United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

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November 19, 2020

Contents

The next release is November 26, 2020

WEEKLY HIGHLIGHTS

Vessel Loading Activity in U.S. Gulf Up Since Late Third Quarter of 2020

In recent weeks, loading activity of oceangoing grain vessels has accelerated in the U.S. Gulf. From the week ending September 3, 2020, to the week ending November 12, 2020, there has been a weekly average of 47 grain vessels loaded or waiting to load. In comparison, from the week ending January 2, 2020 to the week ending August 27, 2020, there was a weekly average of 36 vessels loaded or waiting to load. Higher U.S. Gulf grain vessel loading activity is partly due to strong grain shipments to Asia, especially China. Year-to-date 2020 (as of November 12, 2020), China imported 23 million metric tons (mmt) of U.S. soybeans, compared to 12.5 mmt for the same period in 2019. In addition, ocean freight rates for shipping bulk items, including grain, were lower than for the same period a year ago.

Corn and Wheat Inspections Increase, but Total Grain Inspections Decrease From Last Week

For the week ending November 12, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 3.5 million metric tons (mmt). Total grain inspections were down 12 percent from the previous week, up 26 percent from last year, and up 21 percent from the 3-year average. However, corn inspections increased 18 percent, and wheat inspections increased 7 percent, from the previous week. Demand for wheat increased primarily from Africa, and demand for corn increased mainly from Asia. Yet, the increases could not offset the 22-percent drop in soybean inspections. From the previous week, grain inspections decreased 19 percent in the Pacific Northwest (PNW) and decreased 12 percent in the Mississippi Gulf. During the last 4 weeks, inspections were up 49 percent from last year and up 32 percent from the 3-year average.

Coalition Asks FMC To Suspend Detention and Demurrage Charges

On November 16, a coalition of truckers, shippers, and customs brokers asked the U.S. Federal Maritime Commission (FMC) to consider immediately suspending detention and demurrage charges at the ports of Los Angeles-Long Beach and New York-New Jersey until congestion at the gateways disperses. A record spike in imports over the past 4 months has created the congestion, leading to a shortage of available appointments for truckers to pick up imports or return empty containers from marine terminals in Los Angeles-Long Beach and New York-New Jersey. In response, the coalition asked FMC to temporarily suspend demurrage charges for storing containers at marine terminals beyond the allotted free time. The coalition also requested a temporary ban on detention charges for returning equipment late. In the long term, the coalition is asking FMC to use the interpretive rule on detention and demurrage as a template for rulemaking.

Diesel Fuel Prices Have Largest Weekly Increase of the Year

For the week ending November 16, the U.S. average **diesel fuel price** increased 5.8 cents from the previous week to $2.441 per gallon. Diesel prices have not had a weekly increase this high in over a year (September 2019). According to a recent *Transport Topics* article, trucking demand is high, putting upward pressure on diesel fuel prices. In its latest *Short-Term Energy Outlook*, the U.S. Energy Information Administration (EIA) expects global oil inventories to continue falling in the coming months. However, EIA expects high global oil inventories and surplus production capacity of crude oil will limit upward pressure on oil prices through the end of 2020.

Snapshots by Sector

Export Sales

For the week ending November 5, **unshipped balances** of wheat, corn, and soybeans totaled 62.4 million metric tons (mmt). This was 3 percent lower than last week, but still represented a significant increase in outstanding sales from the same time last year. Net **corn export sales** were 0.978 mmt, down 63 percent from the past week. Net **soybean export sales** were 1.468 mmt, down 4 percent from the previous week. Net weekly **wheat export sales** were 0.301 mmt, down 50 percent from the previous week.

Rail

U.S. Class I railroads originated 27,426 **grain carloads** during the week ending November 7. This was a 2-percent increase from the previous week, 26 percent more than last year, and 23 percent more than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were $63 above tariff for the week ending November 12. This was $302 less than last week and $175 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 14, **barge grain movements** totaled 972,835 tons. This was 5 percent more than the previous week and 9 percent more than the same period last year.

For the week ending November 14, 607 grain barges **moved down river**—1 barge fewer than the previous week. There were 913 grain barges **unloaded in New Orleans**, 4 percent fewer than the previous week.

Ocean

For the week ending November 12, 41 **oceangoing grain vessels** were loaded in the Gulf—32 percent more than the same period last year. Within the next 10 days (starting November 13), 66 vessels are expected to be loaded—38 percent more than the same period last year.

As of November 12, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $41.25. This was 2 percent less than the previous week. The rate from PNW to Japan was $22.75 per mt, 2 percent less than the previous week.

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Feature Article/Calendar

Third-Quarter Corn and Soybean Transport Costs Up From Last Quarter; Landed Costs Mostly Up

Transportation costs for shipping corn and soybeans to Japan from Minneapolis, MN, increased substantially through the U.S. Gulf (Gulf route) and increased moderately through the Pacific Northwest (PNW route) from second quarter 2020 to third quarter 2020 (quarter to quarter). However, from third quarter 2019 to third quarter 2020 (year to year), transportation costs decreased for shipping corn and soybeans by the two major routes.

Rising truck, barge, and ocean rates were the primary drivers behind the quarter-to-quarter increase in transportation costs for corn and soybeans by the Gulf route. Barge rates for the Gulf route rose in response to improved demand for barge services. Ocean rates increased for both routes as demand from Asia remained strong (*Grain Transportation Report (GTR)*, October 15, 2020). Trucking rates rose partly in response to higher demand for trucking corn and soybeans.

Year to year, for both commodities, Gulf-route transportation costs fell moderately, while PNW-route transportation costs fell only slightly. Quarter to quarter, total landed costs for Gulf-route shipments of corn rose with higher transportation costs. However, for the same period, landed costs for PNW-route corn shipments did not change. For soybean shipments by both routes, landed costs increased both from quarter to quarter and from year to year. (tables 1 and 2).

Table 1: Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	3rd qtr. '19	2nd qtr. '20	3rd qtr. '20	Yr. to Yr.	Qtr to Qtr	3rd qtr. '19	2nd qtr. '20	3rd qtr. '20	Yr. to Yr.	Qtr to Qtr
Truck	10.54	9.70	12.38	17.46	27.63	10.54	9.70	12.38	17.46	27.63
Barge[1]	31.96	24.26	29.89	-6.48	23.21	31.96	24.26	29.89	-6.48	23.21
Ocean	50.05	36.33	42.99	-14.11	18.33	50.05	36.33	42.99	-14.11	18.33
Total transportation cost	92.55	70.29	85.26	-7.88	21.30	92.55	70.29	85.26	-7.88	21.30
Farm value[3]	146.45	122.08	116.00	-20.79	-4.98	303.87	299.71	316.85	4.27	5.72
Total landed cost	239	192.37	201.26	-15.79	4.62	396.42	370.00	402.11	1.44	8.68
Transportation % landed cost	38.72	36.54	42.36			23.35	19.00	21.20		

Table 2: Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	3rd qtr. '19	2nd qtr. '20	3rd qtr. '20	Yr. to Yr.	Qtr to Qtr	3rd qtr. '19	2nd qtr. '20	3rd qtr. '20	Yr. to Yr.	Qtr to Qtr
Truck	10.54	9.70	12.38	17.46	27.63	10.54	9.70	12.38	17.46	27.63
Rail[2]	51.44	51.44	51.44	0.00	0.00	57.60	58.59	58.59	1.72	0.00
Ocean	27.90	18.94	23.05	-17.38	21.70	27.90	18.94	23.05	-17.38	21.70
Total Transportation Cost	89.88	80.08	86.87	-3.35	8.48	96.04	87.23	94.02	-2.10	7.78
Farm Value[3]	146.45	122.08	116.00	-20.79	-4.98	303.87	299.71	316.85	4.27	5.72
Total Landed Cost	236.33	202.16	202.87	-14.16	0.35	399.91	386.94	410.87	2.74	6.18
Transportation % Landed Cost	38.03	39.61	42.82			24.02	22.54	22.88		

[1] Barge rates are from Minneapolis, MN to the Gulf.
[2] All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.
[3] USDA, National Agricultural Statistics Service is the source for corn and soybean prices.

Note: qtr. = quarter; yr. = year; landed cost = transportation cost plus farm value.

Source: USDA, Agricultural Marketing Service.

U.S. Gulf Costs

Quarter to quarter. Quarter to quarter, Gulf-route transportation costs rose 21 percent each for corn and soybeans, mainly because of increased rates for each mode (truck, barge, ocean). Ocean rates rose by over 18 percent, mainly reflecting increased demand from Asia (*GTR*, October 15, 2020). Trucking rates for moving corn and soybeans from Minnesota farms to local, truck-served grain elevators rose by 28 percent, partly because of higher demand for grain.

As a percentage of landed costs, transportation costs for shipping corn were 42 percent, and transportation costs for shipping soybeans were 21 percent (table 1). For both commodities, these shares marked quarter-to-quarter increases. Farm values accounted for 58 percent of Gulf-route landed costs for corn and 79 percent of the landed costs for soybeans (table 1). By the Gulf route, farm values decreased 5 percent for corn shipments but increased 6 percent for soybean shipments.

Year to year. Third-quarter 2020 corn exports through the Gulf route totaled 6.5 million metric tons (mmt) (up 50 percent from year to year), accounting for 55 percent of total corn exports. Gulf-route soybean shipments totaled 8.6 mmt (up 17 percent), accounting for 71 percent of total soybean exports (*GTR*, October 8, 2020).

Pacific Northwest Costs

Quarter to quarter. With significantly higher trucking and ocean rates, total transportation costs via the PNW route rose 8 percent for each commodity from quarter to quarter. Rail rates for shipping through the PNW route did not change for either corn or soybeans.

Total PNW-route landed costs for corn did not change. For third-quarter 2020 corn shipments, transportation costs as a share of landed costs increased to 43 percent, thereby offsetting the drop in farm values. Soybean landed costs increased 6 percent because of higher transportation costs and farm values. For soybeans, transportation costs accounted for 23 percent of landed costs—unchanged from last quarter. In third quarter 2020, farm values accounted for 57 percent of the total landed costs for corn shipped through PNW and 77 percent of total landed costs for soybeans (table 2).

Year to year. PNW-route transportation costs fell 3 percent for corn and 2 percent for soybeans from year to year (table 2), mainly because of a large drop in ocean rates. Rail rates did not change for corn but increased 2 percent for soybeans. Total landed costs for corn were down 14 percent because of lower transportation costs and farm values. Total PNW-route landed costs for soybeans increased 3 percent, mainly because of higher farm values.

Third-quarter 2020 PNW-route corn exports totaled 3 mmt—25 percent of total third-quarter U.S. corn exports and up 311 percent, mainly because of increased demand from Asia (*GTR*, October 8, 2020). PNW-route soybean exports were 1.5 mmt, down 39 percent. PNW soybean exports were 13 percent of total third-quarter 2020 soybean exports.

WASDE *Estimates*

According to USDA's November 2020 *World Agricultural Supply and Demand Estimates (WASDE)* report, total U.S. corn exports for marketing year (MY) 2020/21 are expected to increase 49 percent from MY 2019/20, as tight supplies drive prices higher and foreign demand for corn increases. In 2020/21, soybean exports are expected to increase 31 percent from MY 2019/20 in response to higher export demand, higher prices, and lower supplies. *Johnny.Hill@usda.gov*

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
11/18/20	164	288	223	286	184	161
11/11/20	160	288	236	369	189	165

[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	11/13/2020	11/6/2020
Corn	IL–Gulf	-0.77	-0.83
Corn	NE–Gulf	-0.91	-0.99
Soybean	IA–Gulf	-1.19	-1.40
HRW	KS–Gulf	-2.13	-2.44
HRS	ND–Portland	-2.92	-2.95

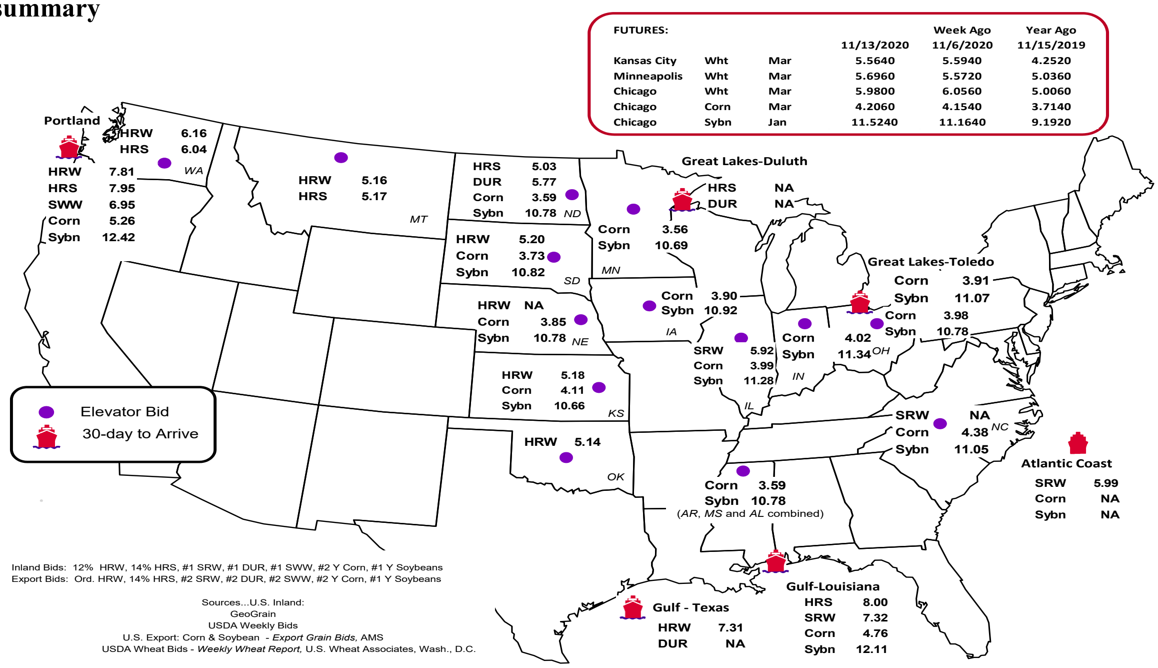
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
11/11/2020[p]	1,942	1,971	7,585	783	12,281	11/7/2020	2,371
11/04/2020[r]	1,918	1,786	9,539	795	14,038	10/31/2020	2,572
2020 YTD[r]	32,885	50,046	244,371	12,988	340,290	2020 YTD	109,327
2019 YTD[r]	38,069	47,885	224,361	15,389	325,704	2019 YTD	110,458
2020 YTD as % of 2019 YTD	86	105	109	84	104	% change YTD	99
Last 4 weeks as % of 2019[2]	432	331	151	263	189	Last 4wks. % 2019	88
Last 4 weeks as % of 4-year avg.[2]	184	199	137	93	145	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.

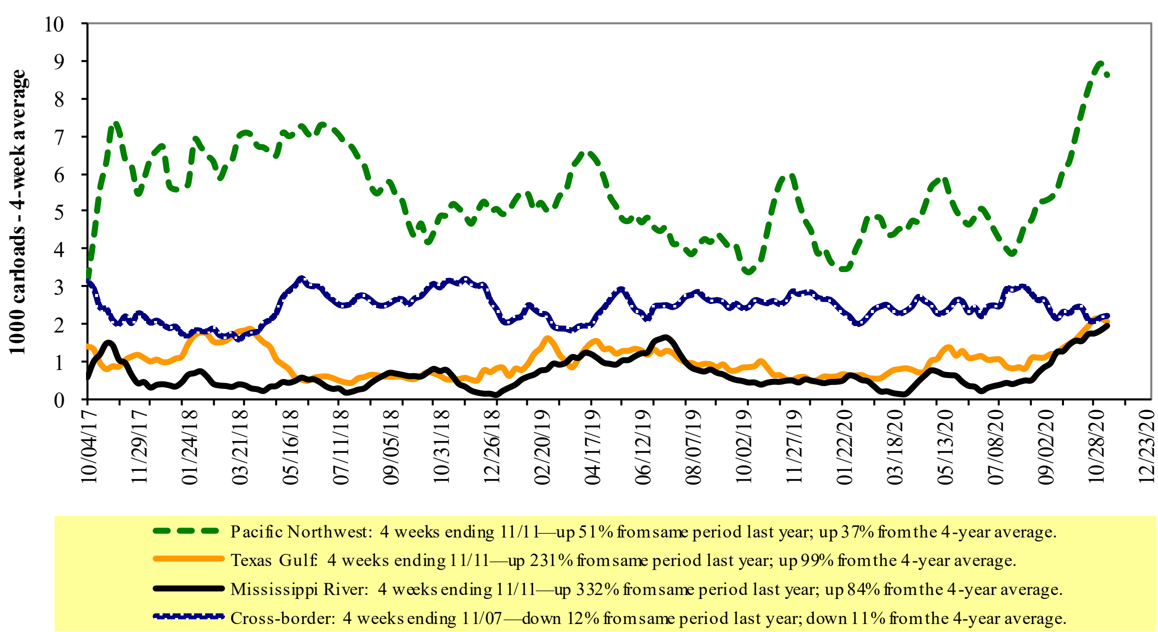
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 11/7/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,650	3,384	14,181	1,110	7,101	27,426	6,186	6,693
This week last year	1,845	2,442	11,119	1,234	5,209	21,849	4,645	5,268
2020 YTD	74,993	109,093	506,472	48,954	243,021	982,533	195,963	214,975
2019 YTD	81,340	119,774	489,318	51,110	228,128	969,670	183,675	201,974
2020 YTD as % of 2019 YTD	92	91	104	96	107	101	107	106
Last 4 weeks as % of 2019*	105	135	122	105	135	124	132	123
Last 4 weeks as % of 3-yr. avg.**	91	118	120	114	134	120	132	119
Total 2019	91,611	136,942	568,369	58,527	260,269	1,115,718	212,471	235,892

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

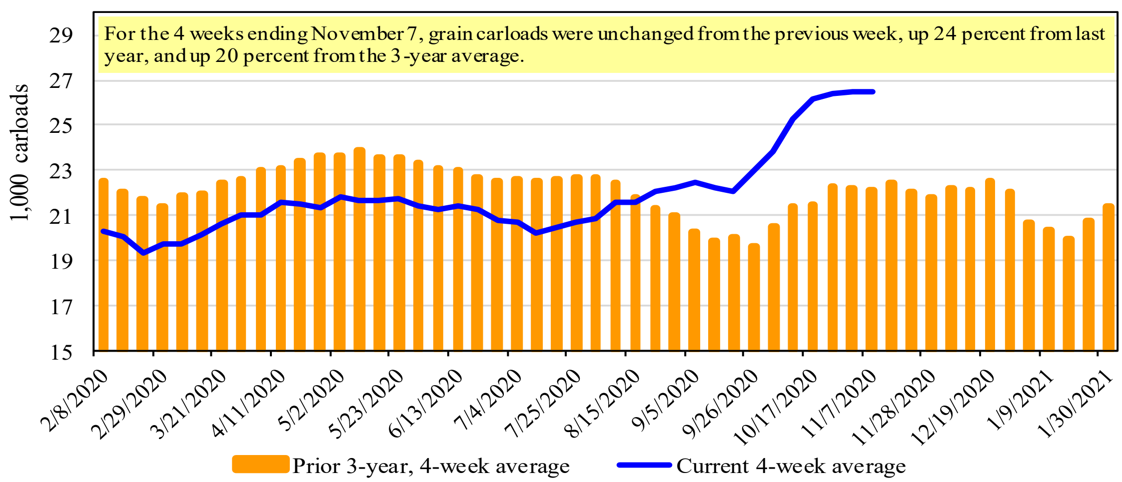
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 11/12/2020		Nov-20	Nov-19	Dec-20	Dec-19	Jan-21	Jan-20	Feb-21	Feb-20
		Delivery period							
BNSF[3]	COT grain units	no offer	no offer	no bids	0	no bids	no bid	no bids	no bid
	COT grain single-car	no offer	no offer	3	1	8	0	0	0
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no bid	no offer	no bid	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.

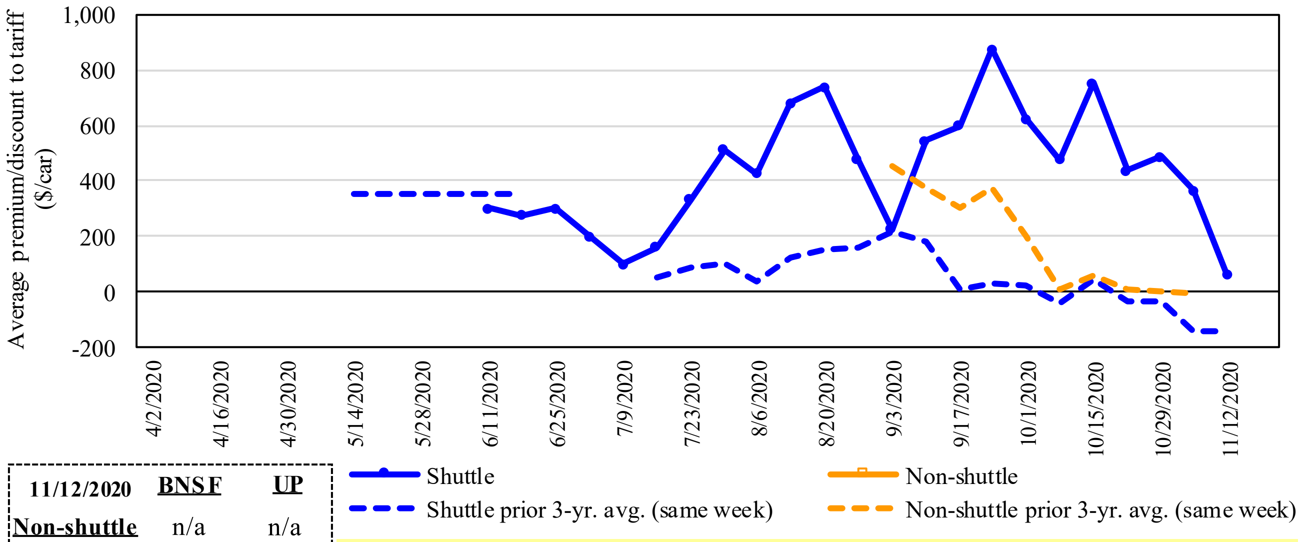
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

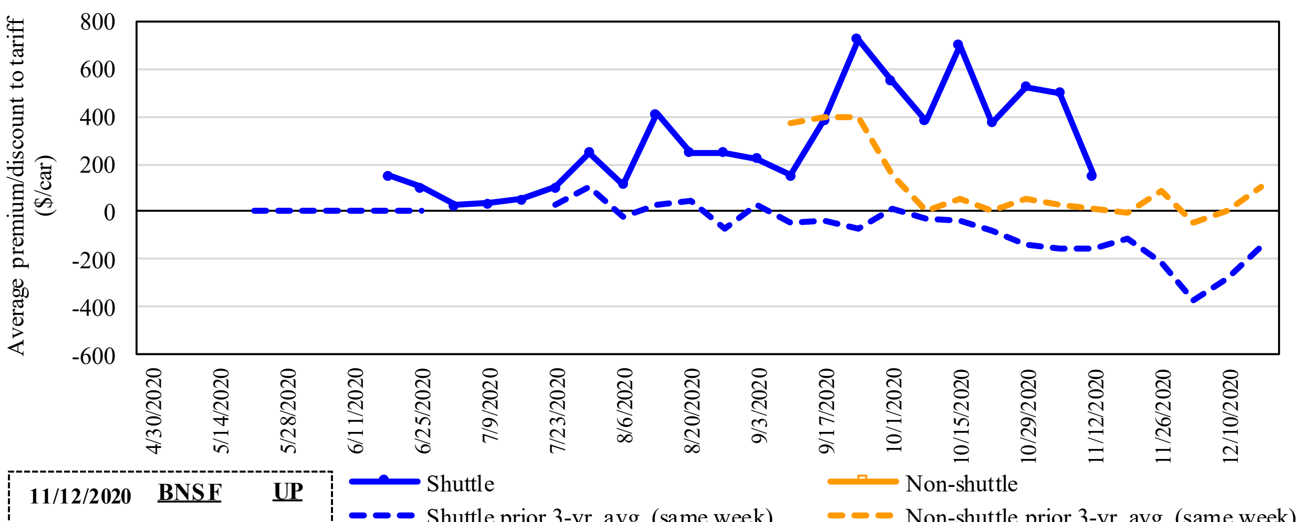


11/12/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$50	$75

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $302 this week and are $813 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



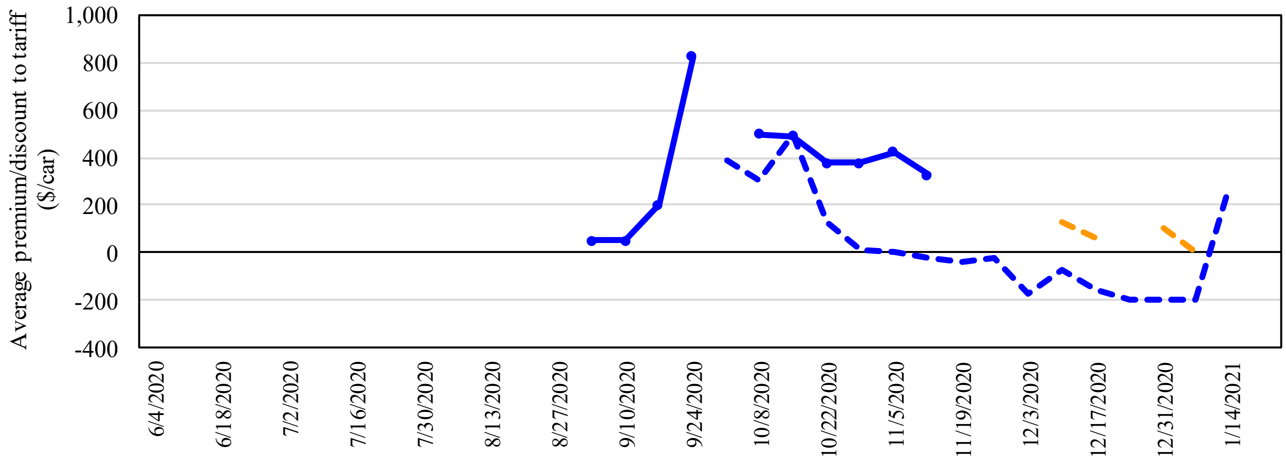
11/12/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$100	$200

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $350 this week and are $575 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



11/12/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	$325

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $100 this week and are $500 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: 11/12/2020	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**	**50**	**100**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(417)	(500)	n/a	n/a	n/a	n/a
	Change from same week 2019	125	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**75**	**200**	**325**	**325**	**50**	**n/a**
	Change from last week	(188)	(200)	(100)	25	(150)	n/a
	Change from same week 2019	225	338	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

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
Date: November 2020							
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.

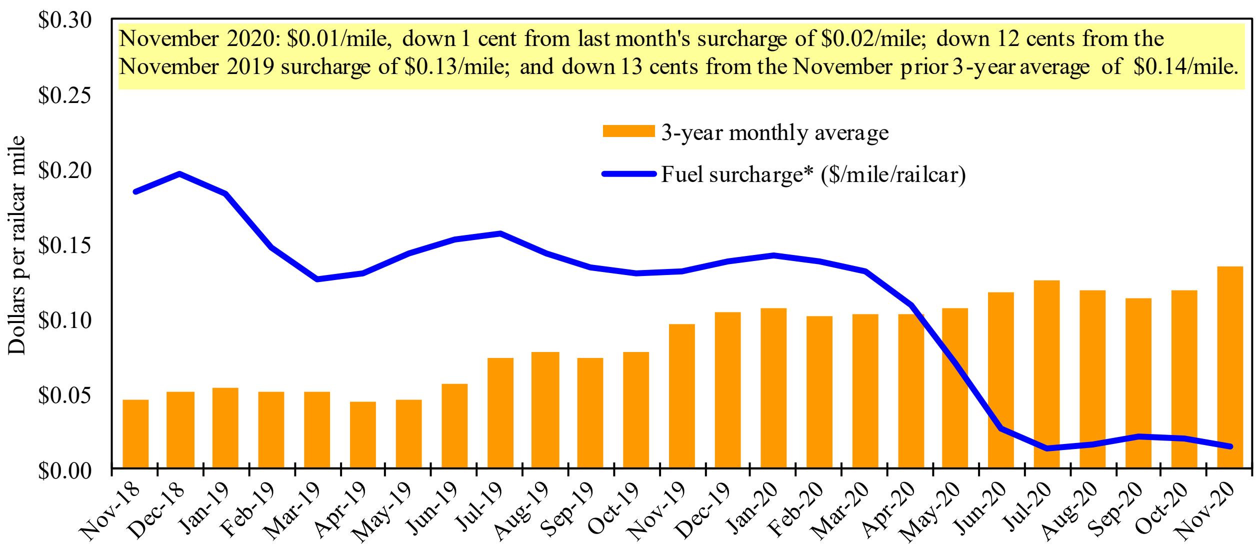
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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

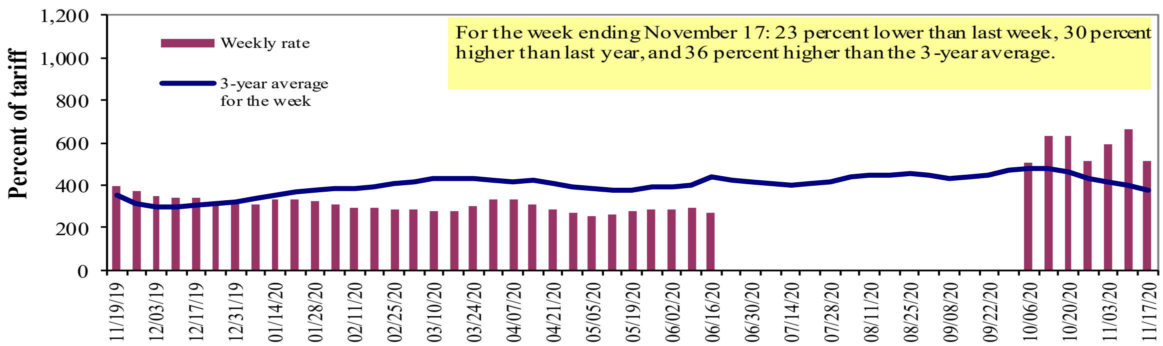
Railroad fuel surcharges, North American weighted average[1]



[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]	11/17/2020	548	518	515	415	535	535	379
	11/10/2020	665	690	665	672	737	737	680
$/ton	11/17/2020	33.92	27.56	23.90	16.56	25.09	21.61	11.90
	11/10/2020	41.16	36.71	30.86	26.81	34.57	29.77	21.35
Current week % change from the same week:								
	Last year	33	24	30	47	91	91	29
	3-year avg. [2]	34	36	36	49	64	64	50
Rate[1]	December	-	-	434	338	391	391	322
	February	-	-	421	315	348	348	291

[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

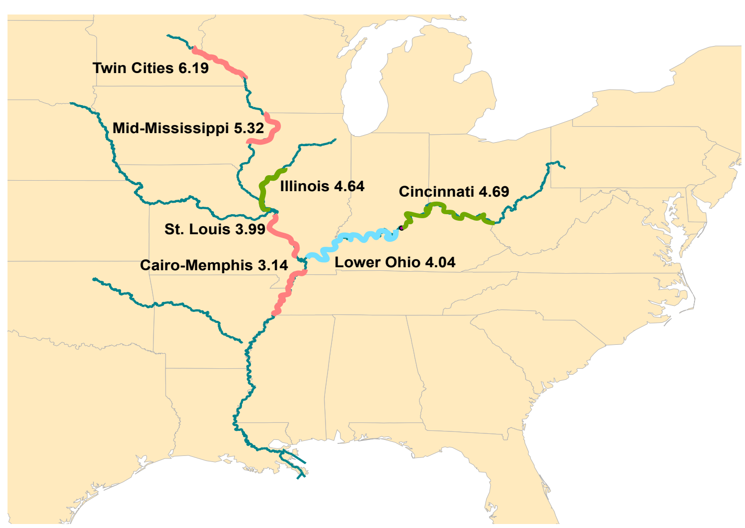
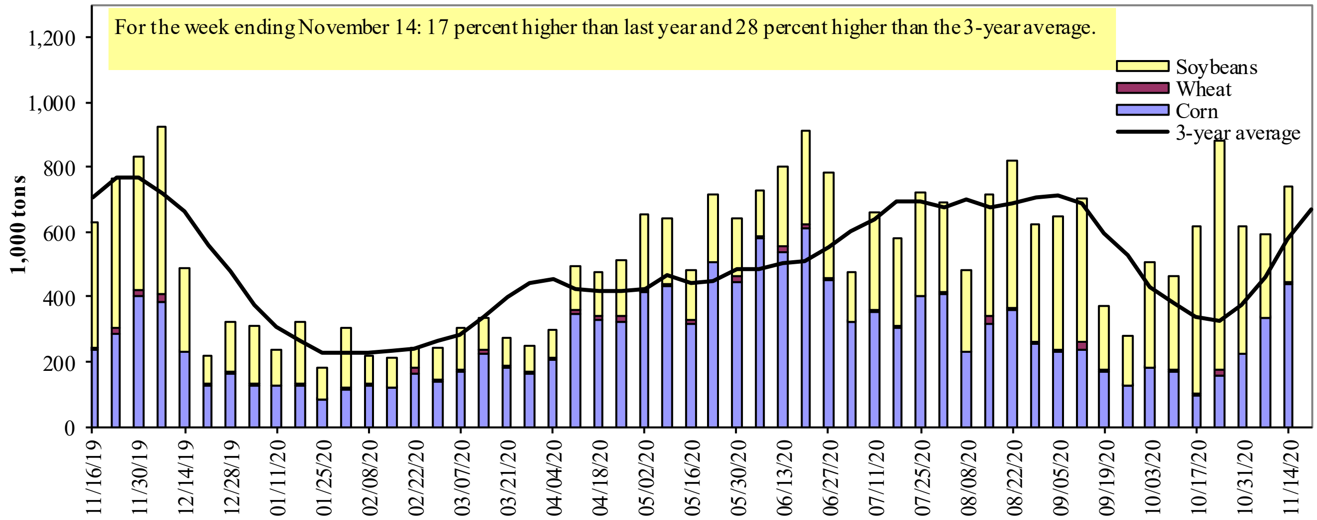


Figure 10

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 11/14/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	152	0	217	0	369
Winfield, MO (L25)	306	5	227	0	537
Alton, IL (L26)	471	5	307	0	783
Granite City, IL (L27)	438	5	298	0	740
Illinois River (La Grange)	73	0	67	0	140
Ohio River (Olmsted)	60	6	100	0	165
Arkansas River (L1)	0	7	60	0	67
Weekly total - 2020	497	18	458	0	973
Weekly total - 2019	325	29	532	4	889
2020 YTD[1]	16,181	1,660	14,926	203	32,970
2019 YTD[1]	10,905	1,469	11,868	141	24,384
2020 as % of 2019 YTD	148	113	126	144	135
Last 4 weeks as % of 2019[2]	161	69	126	799	137
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.

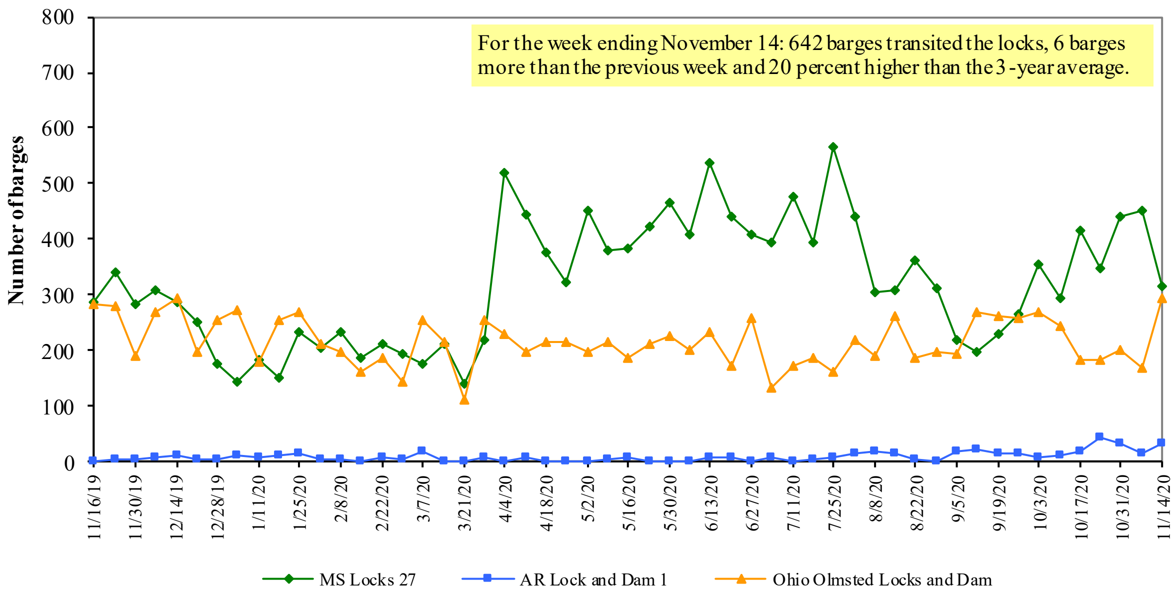
[2] As a percent of same period in 2019.

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

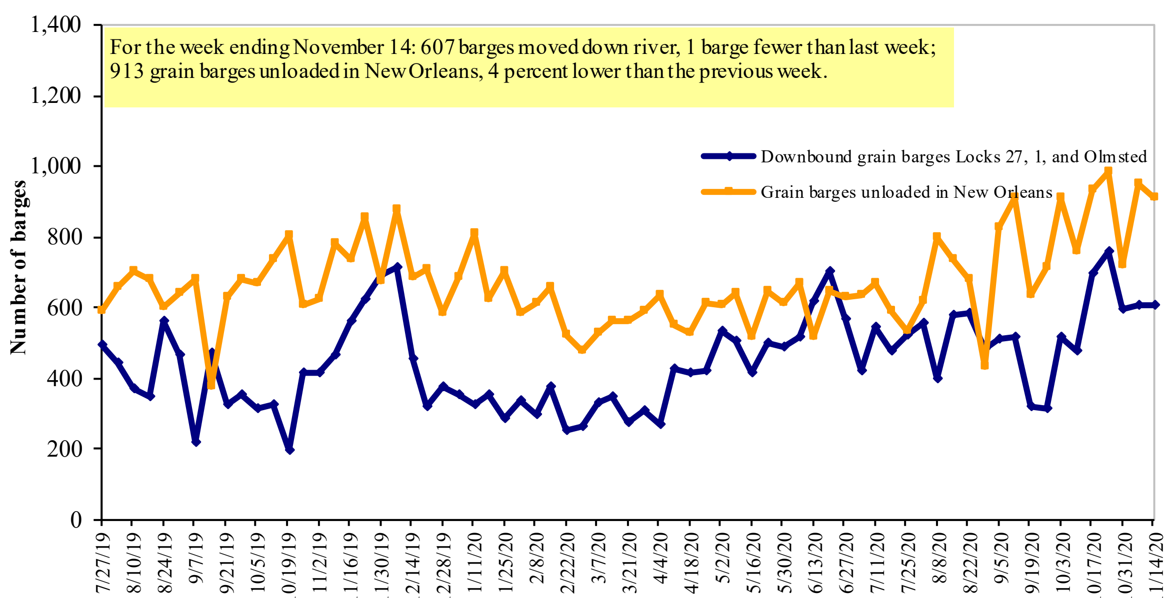
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/16/2020 (U.S. $/gallon)

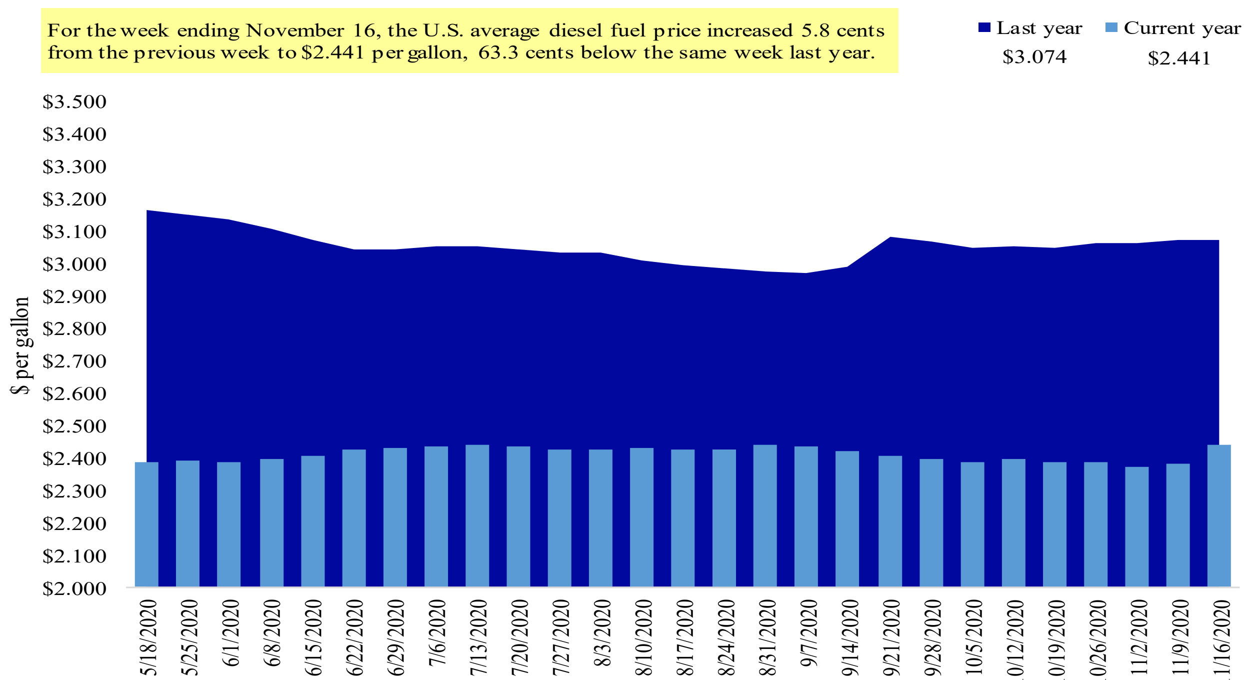
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.487	0.037	-0.566
	New England	2.552	-0.002	-0.497
	Central Atlantic	2.684	0.039	-0.562
	Lower Atlantic	2.337	0.041	-0.585
II	Midwest	2.339	0.078	-0.632
III	Gulf Coast	2.180	0.048	-0.612
IV	Rocky Mountain	2.490	0.118	-0.742
V	West Coast	2.990	0.053	-0.766
	West Coast less California	2.686	0.114	-0.758
	California	3.240	0.003	-0.763
Total	United States	2.441	0.058	-0.633

[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]									
11/5/2020	1,601	421	1,554	1,973	203	5,751	26,583	30,112	62,445
This week year ago	1,117	533	1,190	841	277	3,958	7,933	11,543	23,434
Cumulative exports-marketing year[2]									
2020/21 YTD	4,585	945	3,275	2,162	340	11,306	7,585	19,789	38,680
2019/20 YTD	4,435	1,313	3,003	2,077	393	11,219	4,541	10,595	26,355
YTD 2020/21 as % of 2019/20	103	72	109	104	87	101	167	187	147
Last 4 wks. as % of same period 2019/20*	144	76	131	214	74	141	316	279	268
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 11/05/2020	Total commitments[2]		% change	Exports[3]
	2020/21	2019/20	current MY	3-yr. avg.
	current MY	last MY	from last MY	2017-19
	- 1,000 mt -			
Mexico	7,078	6,344	12	14,869
Japan	4,592	1,709	169	11,221
Columbia	1,654	650	154	4,830
Korea	600	75	698	4,011
China	10,774	61	17,620	909
Top 5 importers	**24,698**	**8,839**	**179**	**35,840**
Total U.S. corn export sales	**34,168**	**12,475**	**174**	**49,983**
% of projected exports	51%	28%		
Change from prior week[2]	**978**	**581**		
Top 5 importers' share of U.S. corn export sales	72%	71%		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 11/05/2020	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	27,553	7,907	248	19,106
Mexico	2,721	2,614	4	4,591
Egypt	1,332	920	45	2,980
Indonesia	773	572	35	2,360
Japan	837	887	(6)	2,288
Top 5 importers	**33,216**	**12,900**	**157**	**31,324**
Total U.S. soybean export sales	**49,969**	**22,138**	**126**	**49,352**
% of projected exports	83%	48%		
change from prior week[2]	**1,468**	**1,239**		
Top 5 importers' share of U.S. soybean export sales	66%	58%		**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 11/05/2020	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	2,249	2,290	(2)	3,213
Philippines	2,373	1,827	30	2,888
Japan	1,571	1,574	(0)	2,655
Nigeria	791	958	(17)	1,433
Korea	1,166	865	35	1,372
Indonesia	606	341	78	1,195
Taiwan	769	772	(0)	1,175
Thailand	495	463	7	727
Italy	487	537	(9)	622
Colombia	268	469	(43)	618
Top 10 importers	**10,775**	**10,094**	7	**15,897**
Total U.S. wheat export sales	**17,058**	**15,177**	12	**23,821**
% of projected exports	64%	58%		
change from prior week[2]	**301**	**239**		
Top 10 importers' share of U.S. wheat export sales	63%	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 11/12/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2019 total*
Pacific Northwest									
Wheat	228	246	93	13,960	12,367	113	85	102	13,961
Corn	136	65	209	8,589	6,949	124	n/a	79	7,047
Soybeans	694	990	70	10,198	9,869	103	177	174	11,969
Total	**1,058**	**1,301**	**81**	**32,748**	**29,185**	**112**	**154**	**142**	**32,977**
Mississippi Gulf									
Wheat	26	7	370	3,264	4,207	78	40	46	4,448
Corn	449	471	95	25,037	18,946	132	159	122	20,763
Soybeans	1,192	1,420	84	27,932	25,798	108	149	130	31,398
Total	**1,666**	**1,898**	**88**	**56,234**	**48,950**	**115**	**144**	**124**	**56,609**
Texas Gulf									
Wheat	51	16	312	4,025	5,719	70	56	70	6,009
Corn	0	29	0	650	579	112	n/a	156	640
Soybeans	63	115	55	1,222	2	n/a	n/a	820	2
Total	**113**	**160**	**71**	**5,897**	**6,300**	**94**	**239**	**223**	**6,650**
Interior									
Wheat	29	51	57	1,873	1,709	110	137	167	1,987
Corn	218	113	193	7,531	6,830	110	100	105	7,857
Soybeans	183	218	84	6,122	6,230	98	122	119	7,043
Total	**431**	**382**	**113**	**15,526**	**14,768**	**105**	**113**	**116**	**16,887**
Great Lakes									
Wheat	8	0	n/a	717	1,041	69	24	39	1,339
Corn	0	0	n/a	61	11	538	64	69	11
Soybeans	85	127	67	771	473	163	n/a	187	493
Total	**93**	**127**	**73**	**1,549**	**1,526**	**102**	**223**	**131**	**1,844**
Atlantic									
Wheat	1	0	n/a	35	37	95	n/a	n/a	37
Corn	0	0	n/a	33	99	33	n/a	0	99
Soybeans	87	71	124	1,157	1,168	99	277	152	1,353
Total	**88**	**71**	**125**	**1,225**	**1,305**	**94**	**282**	**148**	**1,489**
U.S. total from ports*									
Wheat	343	320	107	23,874	25,079	95	72	89	27,781
Corn	803	678	118	41,902	33,415	125	154	110	36,417
Soybeans	2,305	2,940	78	47,402	43,540	109	171	149	52,258
Total	**3,450**	**3,938**	**88**	**113,178**	**102,034**	**111**	**149**	**132**	**116,457**

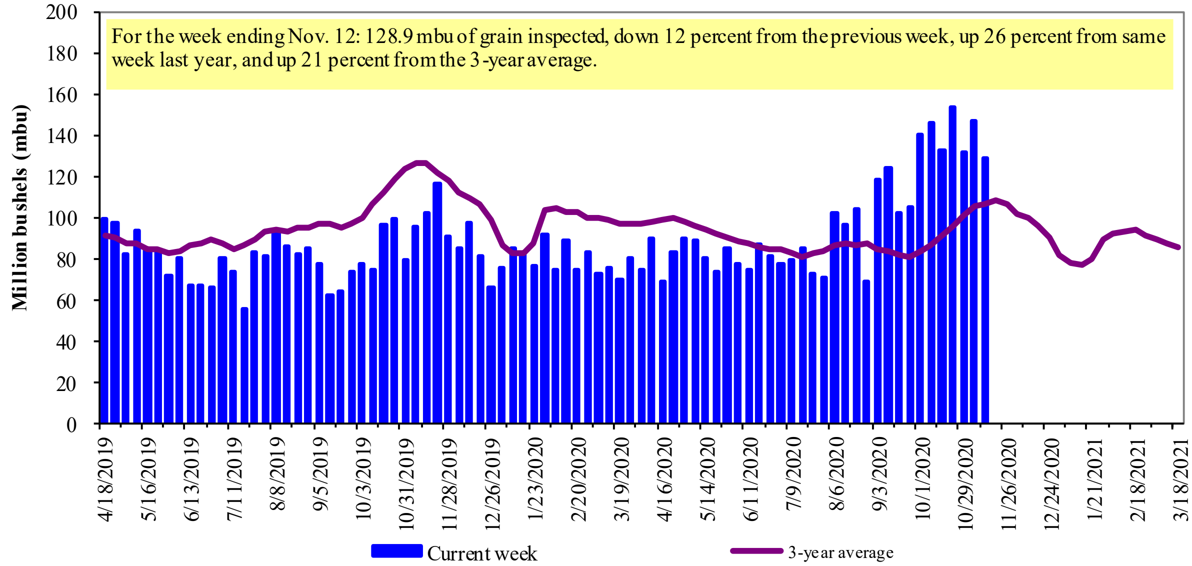
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

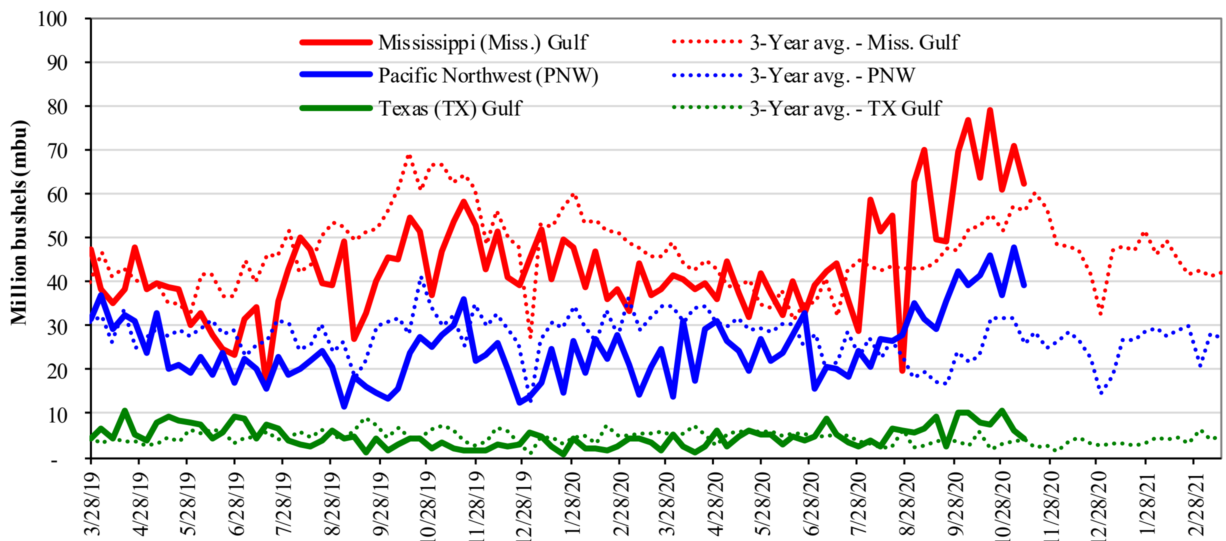


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 11/12/20 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	62.4	Last wk:	down 12	down 30	down 13	down 18
PNW:	39.3	Last Year (same wk):	up 16	up 91	up 19	up 31
TX Gulf:	4.2	3-yr avg. (4-wk. mov. Avg):	up 14	up 31	up 15	up 30

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

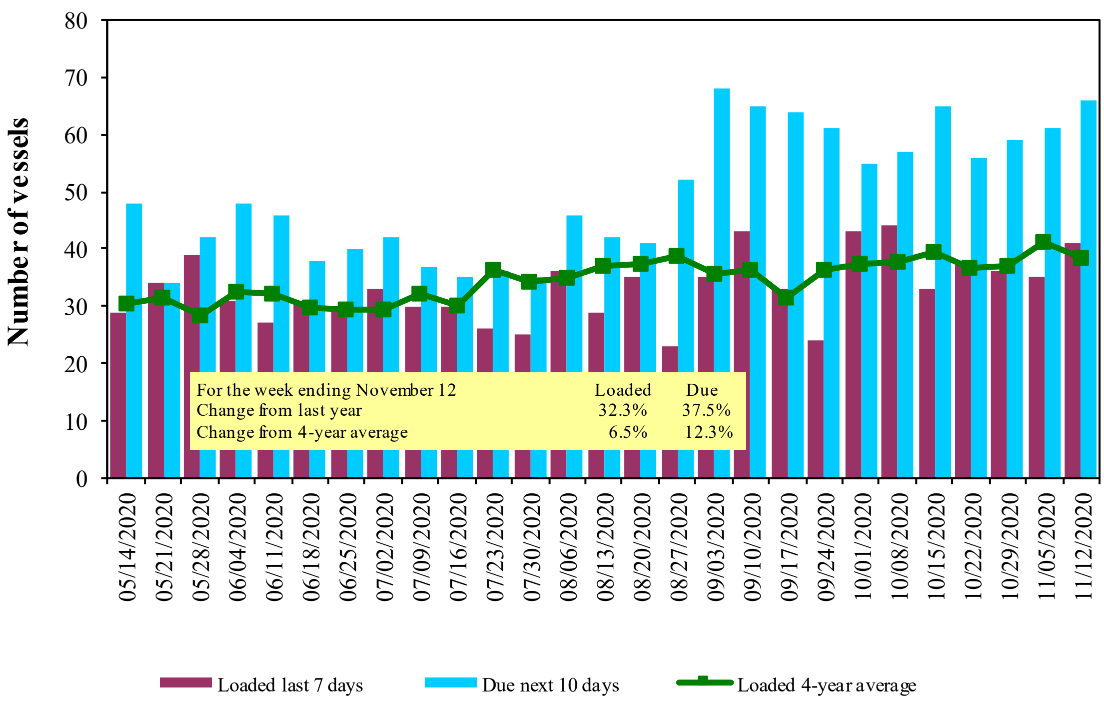
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/12/2020	52	41	66	17
11/5/2020	50	35	61	12
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

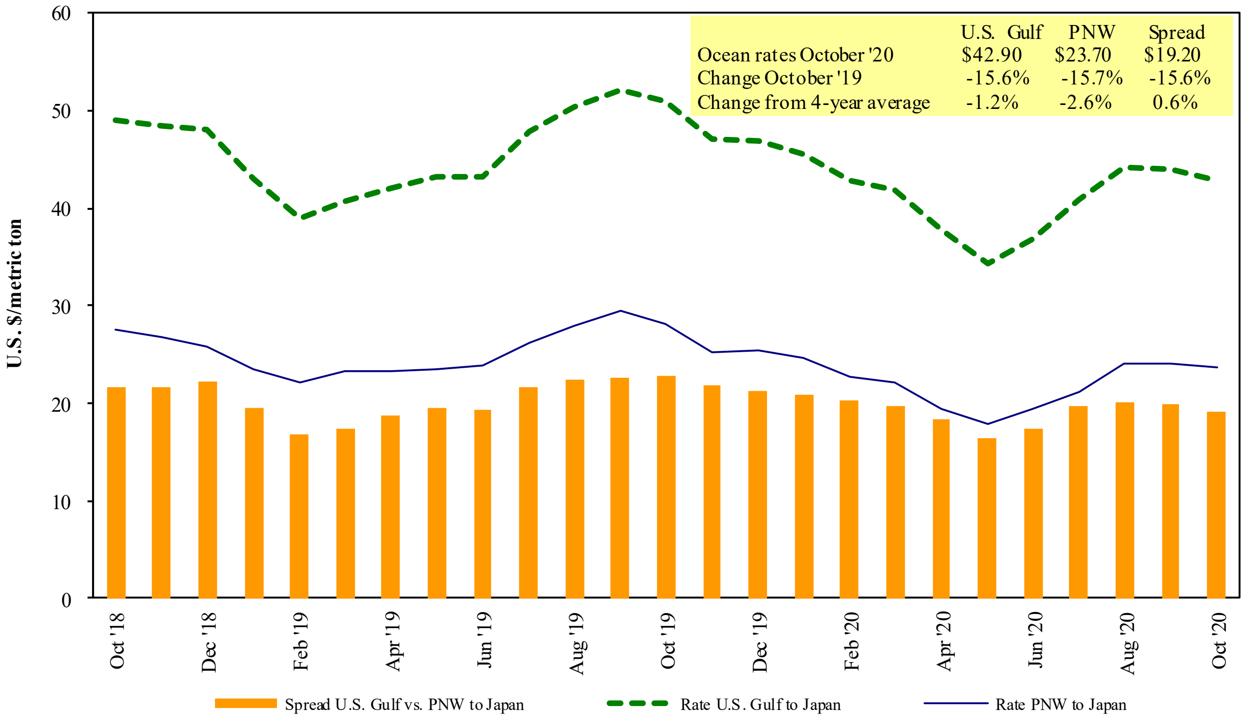
U.S. Gulf[1] vessel loading activity



[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 11/14/2020

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.

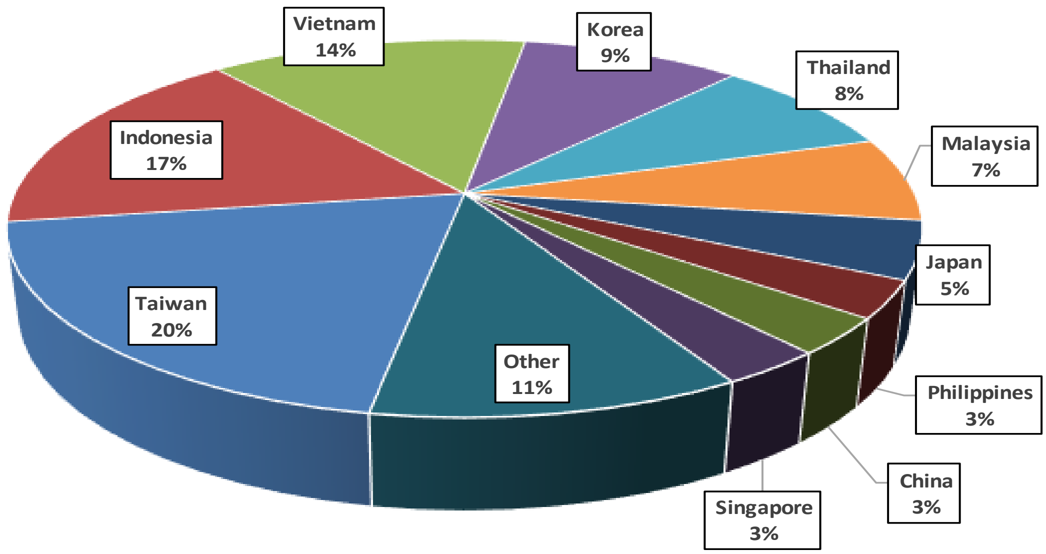
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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

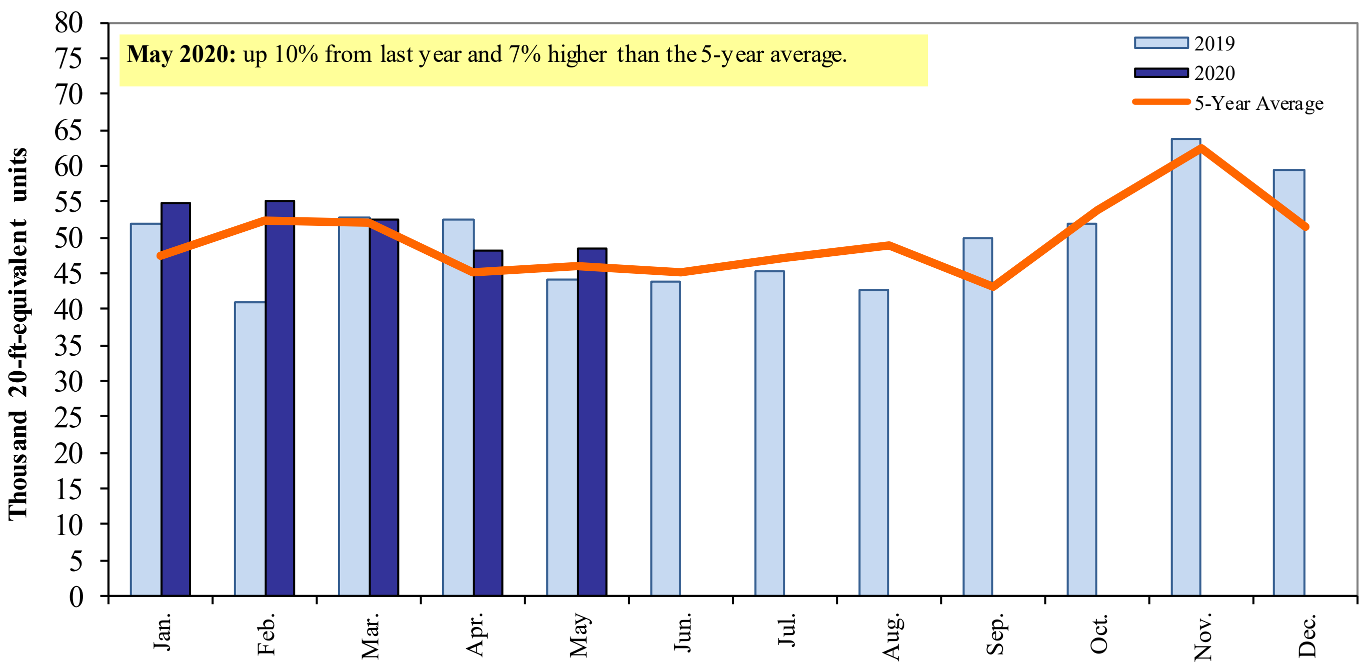


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

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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