



Grain Transportation Report

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

Contact Us

WEEKLY HIGHLIGHTS

December 3, 2020

Contents

Article/
Calendar

Grain
Transportation
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean
Rate Advisory

Datasets

Specialists

Subscription
Information

The next
release is
December 10, 2020

FMCSA Clarifies Agricultural Commodity Definition in Hours-of-Service Regulations

The U.S. Department of Transportation's Federal Motor Carrier Safety Administration (FMCSA) published an [interim final rule](#) (IFR) on November 19, clarifying the definition of "agricultural commodity" in the hours-of-service (HOS) regulations. Currently, drivers transporting agricultural commodities are exempt from the HOS requirements within a 150-air-mile radius from the origin (source of the commodity) to the destination during harvesting and planting seasons. The rulemaking is intended to ensure proper enforcement of the HOS exemption. The interim final rule is effective December 9, 2020. Comments and petitions for reconsideration of the IFR can be submitted by December 24, 2020.

Senate Confirms Two New STB Board Members

On November 18, the Senate confirmed two new members to the Surface Transportation Board (STB), Michelle Schultz and Robert Primus. This marks the first time STB will have a full, five-person Board since the Surface Transportation Board Reauthorization Act of 2015 expanded STB from three to five members. Each member can serve a maximum of two 5-year terms, plus up to 1 additional year until a replacement is confirmed. The current chair, Ann Begeman, is serving her second term, which expires on December 31. STB's two other members, Patrick Fuchs and Martin Oberman, were confirmed in January 2019. STB has broad economic regulatory oversight of railroads, including over rates, service, and mergers and acquisitions.

Grain Inspections Down Slightly but Wheat and Corn Increase

For the week ending November 26, **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 2 percent from the previous week, up 44 percent from last year, and up 23 percent from the 3-year average. Wheat and corn inspections increased 38 percent and 7 percent, respectively, but the increases could not offset the decrease in soybean inspections. Grain inspections increased 9 percent from the previous week in the Pacific Northwest (PNW) and decreased 8 percent in the Mississippi Gulf. During the last 4 weeks, inspections were 35 percent above last year and 30 percent above the 3-year average. Year to date, total grain inspections are 12 percent above the same time last year, with corn up 27 percent and soybeans up 10 percent from last year.

Snapshots by Sector

Export Sales

For the week ending November 19, **unshipped balances** of wheat, corn, and soybeans totaled 61.0 million metric tons (mmt). This was 1 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 1.666 mmt, up 53 percent from the past week. Net **soybean export sales** were 0.768 mmt, down 42 percent from the previous week. Net **wheat export sales** were 0.796 mmt, up significantly from the previous week.

Rail

U.S. Class I railroads originated 25,187 **grain carloads** during the week ending November 21. This was a 14-percent decrease from the previous week, 13 percent more than last year, and 18 percent more than the 3-year average.

Average December shuttle **secondary railcar** bids/offers (per car) were \$55 above tariff for the week ending November 26. This was \$49 more than last week and \$434 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 28, **barge grain movements** totaled 1,117,565 tons. This was 13 percent less than the previous week and 9 percent more than the same period last year.

For the week ending November 28, 707 grain barges **moved down river**—88 barges fewer than the previous week. There were 979 grain barges **unloaded in New Orleans**, 1 percent lower than the previous week.

Ocean

For the week ending November 26, 39 **oceangoing grain vessels** were loaded in the Gulf—8 percent more than the same period last year. Within the next 10 days (starting November 27), 62 vessels were expected to be loaded—38 percent more than the same period last year.

Fuel

For the week ending November 30, the U.S. average **diesel fuel price** increased 4.0 cents from the previous week to \$2.502 per gallon, 56.8 cents below the same week last year.

Feature Article/Calendar

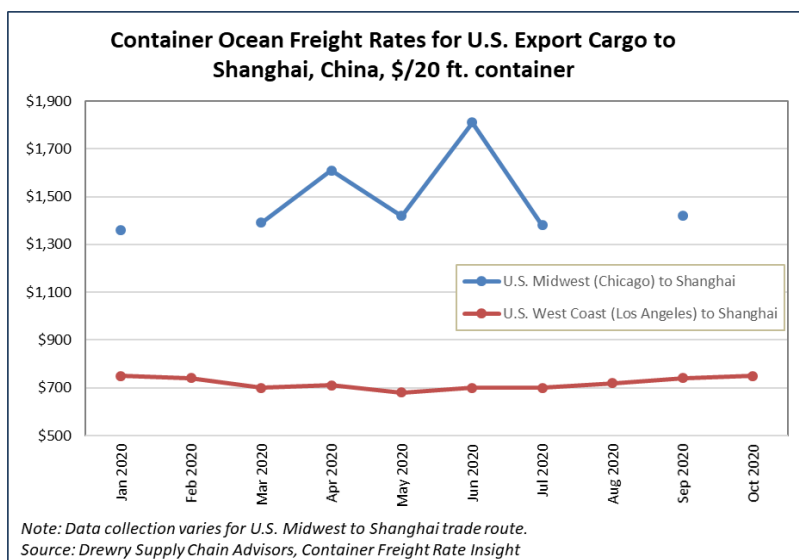
Import Surge Generates Container Shortages and Extra Costs For U.S. Containerized Grain Exporters

Containerized grain exports have remained strong despite facing numerous supply chain challenges in 2020. Shipments have surpassed the 5-year average every month this year (**GTR Figure 19**) and are on pace to exceed the record set in 2018 if ocean freight service keeps up with overseas demand. Soybeans remain the top containerized grain export followed by distillers' dried grains with solubles (DDGS) (see table). Combined, these two commodities represent nearly 80 percent of the U.S. containerized grain market.

Commodities	Metric Tons	TEU	Share
Soybeans	2,939,339	217,964	45%
Distillers dried grains (DDGS)	2,212,635	171,224	34%
Corn	572,957	42,692	9%
Animal feed	504,413	44,255	8%
Residues of starch manufacturing	128,345	9,763	2%
Other	127,420	10,361	2%
Total	6,485,110	496,259	100%

Source: PIERS, IHS Markit
TEU: Twenty-foot equivalent units

Since the beginning of the year, export ocean freight rates have remained relatively stable in the face of immense marketplace volatility (see figure). Spot rates from Los Angeles, CA, to Shanghai, China, have stayed between \$680 and \$750 per 20-foot container since January. However, rates have increased steadily in the last few months—from \$700 in July to \$750 in October.



Rates from inland U.S. locations have been more volatile. Demand spikes for import cargo also put pressure on container availability and rates for the export market. Carriers increased spot rates by more than \$200 per container in April and by almost \$400 in June.

More rate increases are expected through the end of the year as the container freight market becomes tighter in the face of surging import demand.

After months of pent up U.S. consumer demand and now peak holiday shopping season, there is an unprecedented surge in containers carrying Asian imports to U.S. ports. The surge is stretching ocean-container freight service and container availability to their limits. According to the latest “Container Freight Rate Insight” from Drewry Supply Chain Advisors, import rates from Asia more than doubled from April to October. In response, China’s Ministry of Transportation and Communications instructed carriers either to add more vessel capacity or reduce rate increases to mitigate skyrocketing spot rates. The remainder of this article describes the ripple effect of this surge in imports on the agricultural export community.

Service Challenges for Agricultural Exporters

Since early October, many agricultural exporters have experienced a decline in ocean container shipping service as carriers have given priority to the surging Asia-to-U.S. import cargo. This triage has left many would-be agricultural exports from the United States stranded. Exporters are facing a shortage of empty

containers, difficulties making bookings with many ocean carriers, and unexpected transfers of containers to other vessels with later departures—in some cases, with little-to-no notice.

Carriers expect strong import volumes to continue until manufacturing shuts down for the Chinese New Year holiday, mid-February 2021. As a result, some carriers have announced general rate increases (GRIs)—from \$100 to \$1,000 per container—to take effect at the end of November. Most U.S. agricultural exporters cannot absorb a \$1,000 GRI, as profit margins are too thin to sustain this level of increase. Even without an official GRI, export costs from the United States are already increasing with shifting transportation schedules and (for many exporters) costly changes from one shipping company to another.

Carriers are adjusting container allocation and vessel schedules to accommodate the rise in import traffic from Asia. Currently import rates are about 4 times higher than export rates. This sharp disparity encourages carriers to quickly move containers back to Asia empty, opting for higher revenue cargo and exacerbating the U.S. container shortage. Additionally, changing vessel schedules shift the allotted timeframe U.S. exporters are given to pick up and deliver containers to and from port terminals. When the dates and times shift, a ripple effect dramatically increases costs to the exporter. These take the form of higher trucking costs, additional storage costs, extensions of equipment rentals, and delays to the overseas buyer.

Arguing that these practices by the ocean carriers are unreasonable, many agricultural exporters have requested official action from the Federal Maritime Commission (FMC). In response to letters from the agricultural export community and [USDA](#), FMC expanded its investigation into whether carriers in alliances that call on the ports of Long Beach, Los Angeles, New York, and/or New Jersey are violating Federal regulations. Practices under investigation for possible violations concern demurrage and detention, container return, container availability for U.S. export cargoes, and other issues.

FMC's November 19 [Supplemental Order](#) expands the authority of its [Fact Finding 29 Order](#) issued earlier this year. These orders should determine if ocean container carriers' practices related to detention and demurrage, container return, and container availability for U.S. export cargoes violate 46 U.S.C. 41102(c). In the meantime, agricultural shippers [fear the situation may worsen](#) and continue into early 2021, causing continued uncertainty for containerized agricultural exports.

april.taylor@usda.gov

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
12/02/20	168	288	223	258	n/a	n/a
11/25/20	165	288	221	257	186	163

¹Indicator: Base year 2000 = 100. Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan (\$/metric ton); n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

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

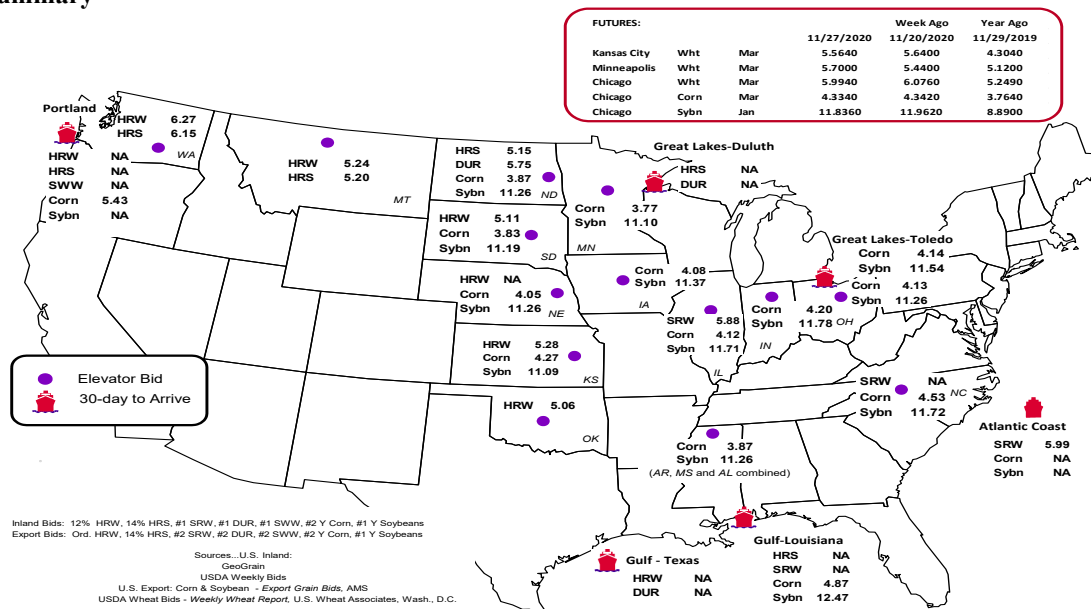
Commodity	Origin-destination	11/27/2020	11/20/2020
Corn	IL-Gulf	-0.75	-0.76
Corn	NE-Gulf	-0.82	-0.92
Soybean	IA-Gulf	-1.10	-1.18
HRW	KS-Gulf	n/a	-2.33
HRS	ND-Portland	n/a	-2.90

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		Pacific	Atlantic &	Total	Week ending	Cross-border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
11/25/2020 ^p	2,439	2,151	7,583	1,004	13,177	11/21/2020	2,794
11/18/2020 ^r	1,616	2,608	8,246	1,286	13,756	11/14/2020	2,140
2020 YTD ^r	36,940	54,805	260,200	19,542	371,487	2020 YTD	114,261
2019 YTD ^r	39,200	49,165	235,749	15,485	339,599	2019 YTD	116,571
2020 YTD as % of 2019 YTD	94	111	110	126	109	% change YTD	98
Last 4 weeks as % of 2019 ²	415	427	139	1,351	193	Last 4wks. % 2019	87
Last 4 weeks as % of 4-year avg. ²	278	189	139	185	161	Last 4wks. % 4 yr.	92
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,674

¹Data is incomplete as it is voluntarily provided.

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

³Cross-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.

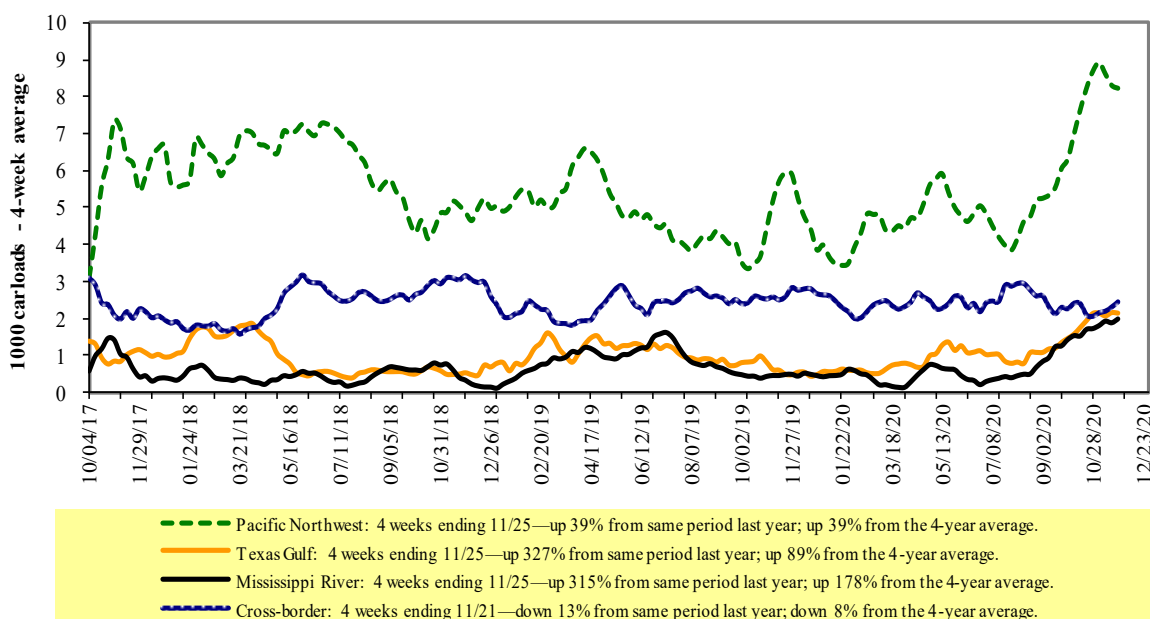
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 11/21/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,164	3,314	11,727	1,290	6,692	25,187	5,991	5,661
This week last year	1,646	2,366	12,605	1,312	4,282	22,211	4,107	5,191
2020 YTD	79,853	115,492	533,233	51,417	256,848	1,036,843	207,342	226,284
2019 YTD	84,218	125,035	514,232	53,499	237,237	1,014,221	191,835	212,071
2020 YTD as % of 2019 YTD	95	92	104	96	108	102	108	107
Last 4 weeks as % of 2019*	132	125	116	98	144	123	135	115
Last 4 weeks as % of 3-yr. avg.**	111	118	120	116	139	123	127	118
Total 2019	91,611	136,952	568,369	58,527	260,269	1,115,728	212,342	235,892

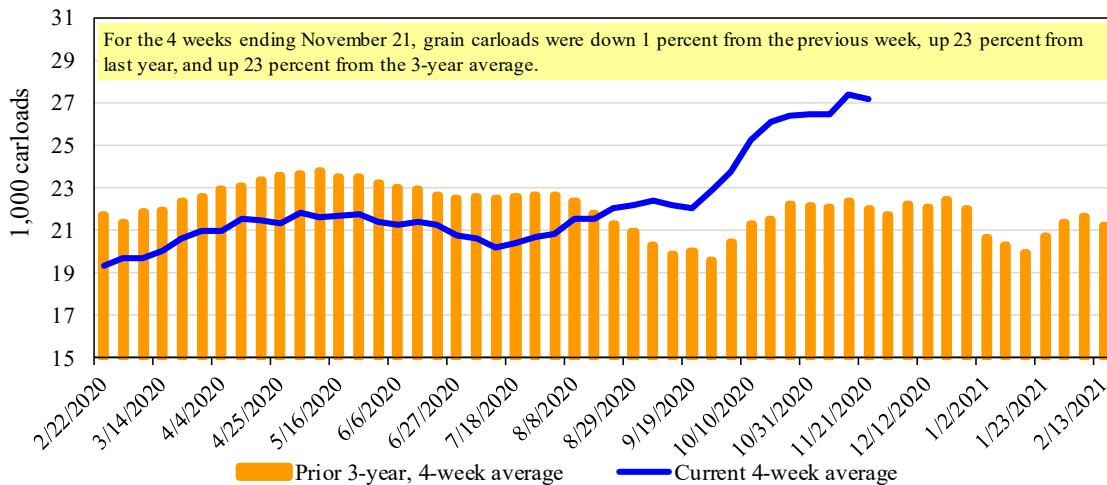
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

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

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads

Source: Association of American Railroads.

Table 5

Railcar auction offerings¹ (\$/car)²

For the week ending: 11/26/2020		Delivery period							
		Dec-20	Dec-19	Jan-21	Jan-20	Feb-21	Feb-20	Mar-21	Mar-20
BNSF ³	COT grain units	no bids	no bid	0	0	no bids	1	no bids	0
	COT grain single-car	0	0	0	0	0	0	0	0
UP ⁴	GCAS/Region 1	no offer	10	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 bid	n/a	n/a

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

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

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

⁴UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

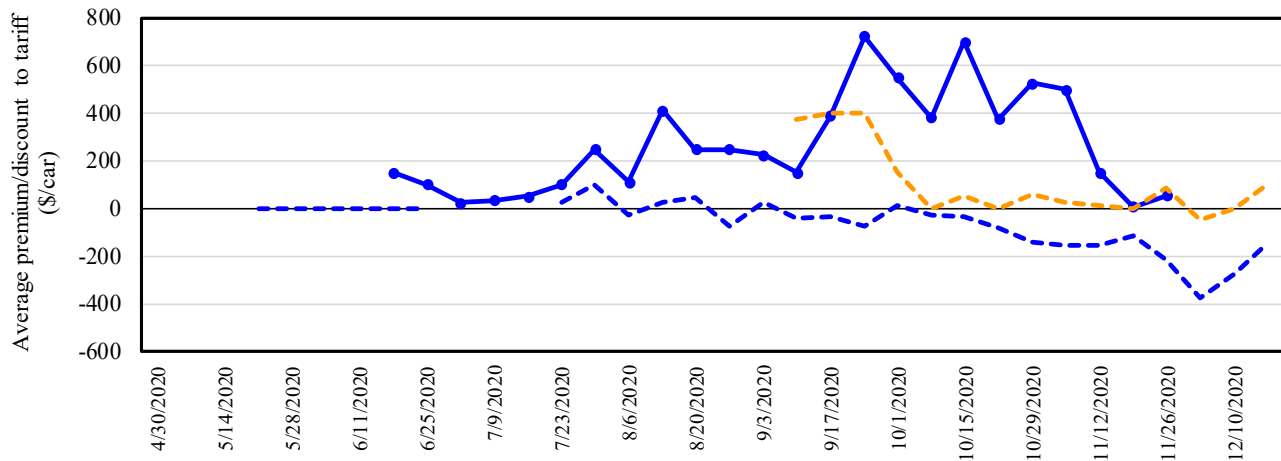
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

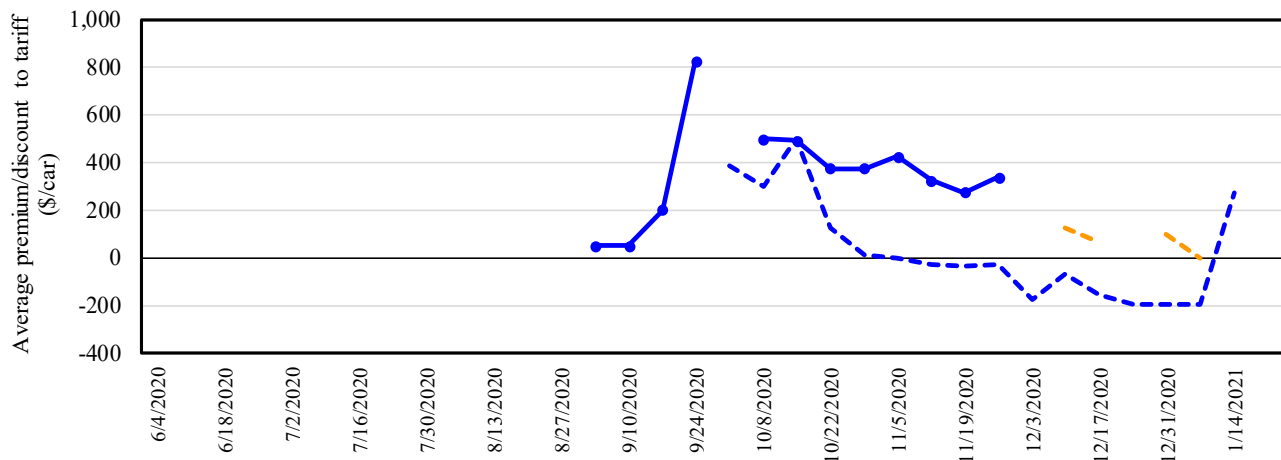
Figure 4
Bids/offers for railcars to be delivered in December 2020, secondary market



11/26/2020	BNSF	UP	Shuttle	Non-shuttle
Non-shuttle	n/a	n/a	Shuttle prior 3-yr. avg. (same week)	Non-shuttle prior 3-yr. avg. (same week)
Shuttle	\$97	\$13	There were no non-shuttle bids/offers this week. Average shuttle bids/offers rose \$49 this week and are \$670 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 January 2021, secondary market

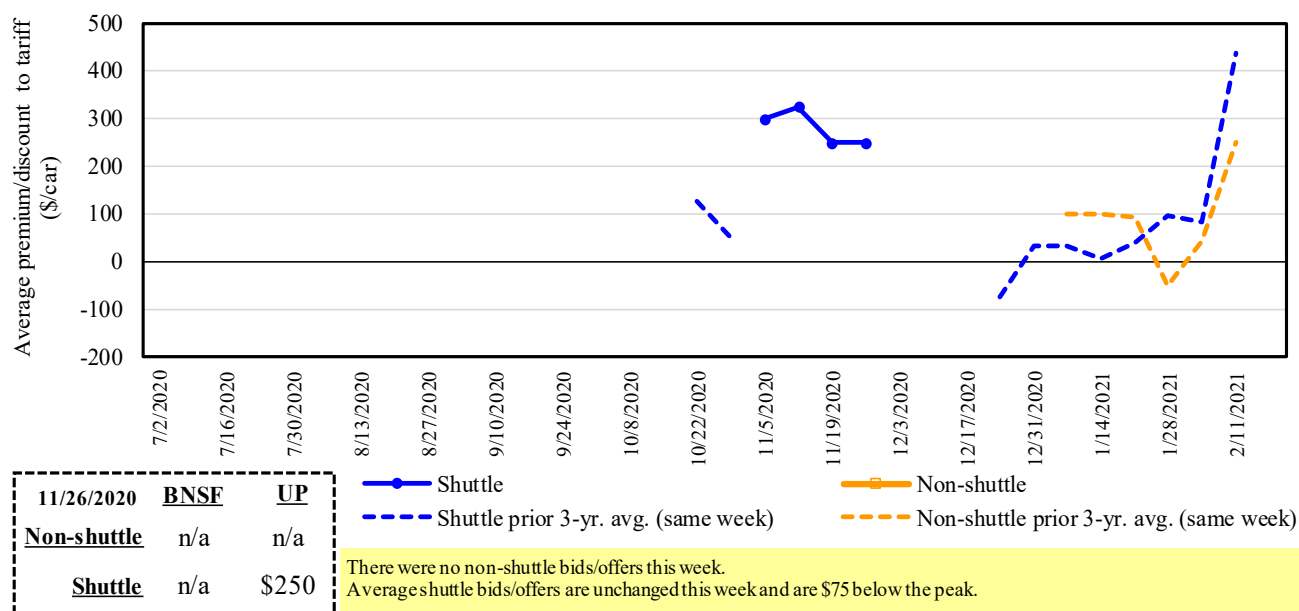


11/26/2020	BNSF	UP	Shuttle	Non-shuttle
Non-shuttle	n/a	n/a	Shuttle prior 3-yr. avg. (same week)	Non-shuttle prior 3-yr. avg. (same week)
Shuttle	\$375	\$300	There were no non-shuttle bids/offers this week. Average shuttle bids/offers rose \$63 this week and are \$488 below the peak.	

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 February 2021, secondary market



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

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending: 11/26/2020		Delivery period					
		Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-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	97	375	n/a	n/a	n/a	n/a
	Change from last week	84	125	n/a	n/a	n/a	n/a
	Change from same week 2019	472	n/a	n/a	n/a	n/a	n/a
	UP-Pool	13	300	250	200	n/a	n/a
	Change from last week	13	0	0	0	n/a	n/a
	Change from same week 2019	396	350	n/a	n/a	n/a	n/a

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

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

BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

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

Table 7

Tariff rail rates for unit and shuttle train shipments¹

December 2020	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$30	\$39.85	\$1.08	-2
	Grand Forks, ND	Duluth-Superior, MN	\$4,208	\$0	\$41.79	\$1.14	-3
	Wichita, KS	Los Angeles, CA	\$7,115	\$0	\$70.66	\$1.92	-2
	Wichita, KS	New Orleans, LA	\$4,525	\$53	\$45.47	\$1.24	-3
	Sioux Falls, SD	Galveston-Houston, TX	\$6,851	\$0	\$68.03	\$1.85	-2
	Colby, KS	Galveston-Houston, TX	\$4,801	\$59	\$48.26	\$1.31	-3
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$81	\$51.66	\$1.41	-4
	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$60	\$39.33	\$1.00	-3
	Toledo, OH	Raleigh, NC	\$7,833	\$0	\$77.79	\$1.98	15
	Des Moines, IA	Davenport, IA	\$2,455	\$13	\$24.51	\$0.62	0
	Indianapolis, IN	Atlanta, GA	\$5,979	\$0	\$59.37	\$1.51	3
	Indianapolis, IN	Knoxville, TN	\$5,040	\$0	\$50.05	\$1.27	3
Soybeans	Des Moines, IA	Little Rock, AR	\$3,900	\$38	\$39.10	\$0.99	0
	Des Moines, IA	Los Angeles, CA	\$5,780	\$109	\$58.48	\$1.49	-3
	Minneapolis, MN	New Orleans, LA	\$3,631	\$22	\$36.28	\$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	\$60	\$46.73	\$1.27	-3	
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	\$96	\$60.65	\$1.65	-4
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	0
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,820	\$60	\$38.53	\$0.98	-4
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
	Des Moines, IA	Amarillo, TX	\$4,320	\$47	\$43.37	\$1.10	0
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,100	\$0	\$50.65	\$1.29	2
	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	\$70	\$49.10	\$1.34	-3
	Toledo, OH	Huntsville, AL	\$4,945	\$0	\$49.11	\$1.34	3
Grand Island, NE	Portland, OR	\$5,260	\$98	\$53.21	\$1.45	-13	

¹A 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.

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

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

⁴Percentage 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: December 2020			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,384	\$0	\$75.45	\$2.05	-2
	OK	Cuautitlan, EM	\$6,713	\$42	\$69.01	\$1.88	-2
	KS	Guadalajara, JA	\$7,471	\$348	\$79.90	\$2.17	-4
	TX	Salinas Victoria, NL	\$4,347	\$25	\$44.67	\$1.21	-1
Corn	IA	Guadalajara, JA	\$8,902	\$280	\$93.82	\$2.38	-3
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	0
	NE	Queretaro, QA	\$8,300	\$86	\$85.68	\$2.17	-2
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,665	\$84	\$79.17	\$2.01	-2
	SD	Torreon, CU	\$7,690	\$0	\$78.57	\$1.99	0
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$264	\$90.02	\$2.45	-2
	NE	Guadalajara, JA	\$9,157	\$271	\$96.33	\$2.62	-3
	IA	El Castillo, JA	\$9,410	\$0	\$96.15	\$2.61	-1
	KS	Torreon, CU	\$8,014	\$179	\$83.71	\$2.28	-2
Sorghum	NE	Celaya, GJ	\$7,772	\$241	\$81.88	\$2.08	-3
	KS	Queretaro, QA	\$8,108	\$52	\$83.37	\$2.12	-1
	NE	Salinas Victoria, NL	\$6,713	\$42	\$69.01	\$1.75	-1
	NE	Torreon, CU	\$7,092	\$159	\$74.09	\$1.88	-3

¹Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

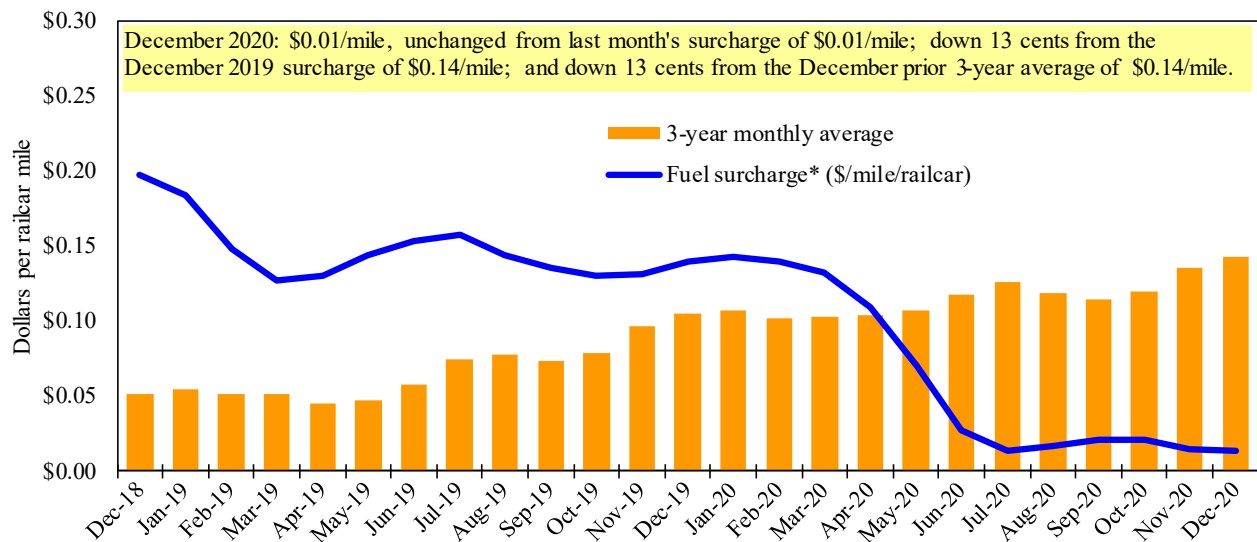
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

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

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

Figure 7

Railroad fuel surcharges, North American weighted average¹

¹ Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

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

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 8

Illinois River barge freight rate^{1,2,3}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

³No 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
Rate¹	12/1/2020	-	431	465	373	473	473	325
	11/24/2020	467	447	463	350	457	457	321
\$/ton	12/1/2020	-	22.93	21.58	14.88	22.18	19.11	10.21
	11/24/2020	28.91	23.78	21.48	13.97	21.43	18.46	10.08
Current week % change from the same week:								
	Last year	-	21	32	49	85	85	41
	3-year avg. ²	-	22	36	51	54	56	44
Rate¹	January	-	-	432	332	378	378	300
	March	-	-	395	303	337	337	278

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

**Figure 9
Benchmark tariff rates**

Calculating barge rate per ton:
(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

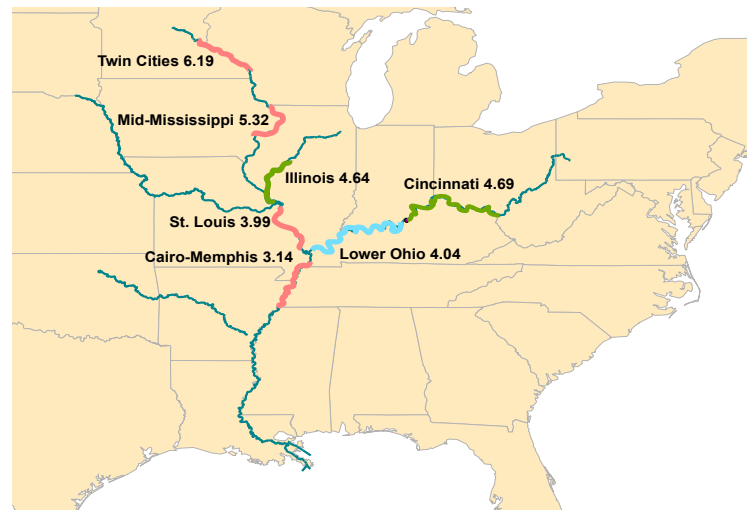
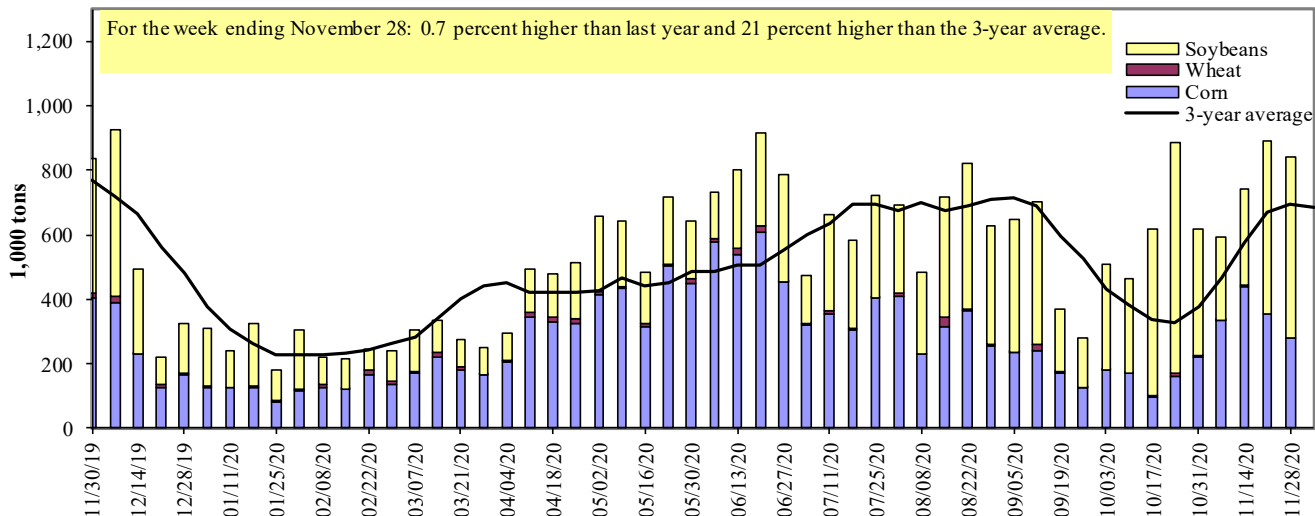


Figure 10

Barge movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



¹ The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers.

Table 10

Barge grain movements (1,000 tons)

For the week ending 11/28/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	82	0	186	0	269
Winfield, MO (L25)	183	0	376	0	559
Alton, IL (L26)	277	0	487	0	764
Granite City, IL (L27)	279	0	562	0	840
Illinois River (La Grange)	113	0	113	0	226
Ohio River (Olmsted)	81	12	136	2	231
Arkansas River (L1)	0	11	35	0	47
Weekly total - 2020	360	23	733	2	1,118
Weekly total - 2019	418	33	569	0	1,021
2020 YTD ¹	16,993	1,689	16,472	211	35,365
2019 YTD ¹	11,674	1,524	13,022	143	26,363
2020 as % of 2019 YTD	146	111	126	148	134
Last 4 weeks as % of 2019 ²	135	61	110	550	119
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.

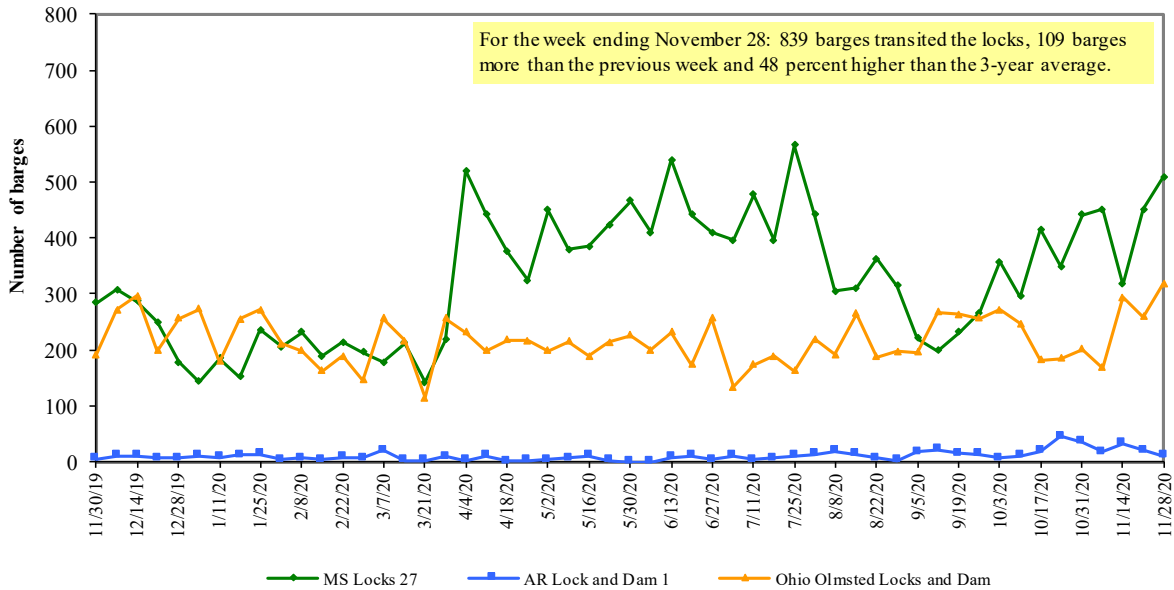
² As a percent of same period in 2019.

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

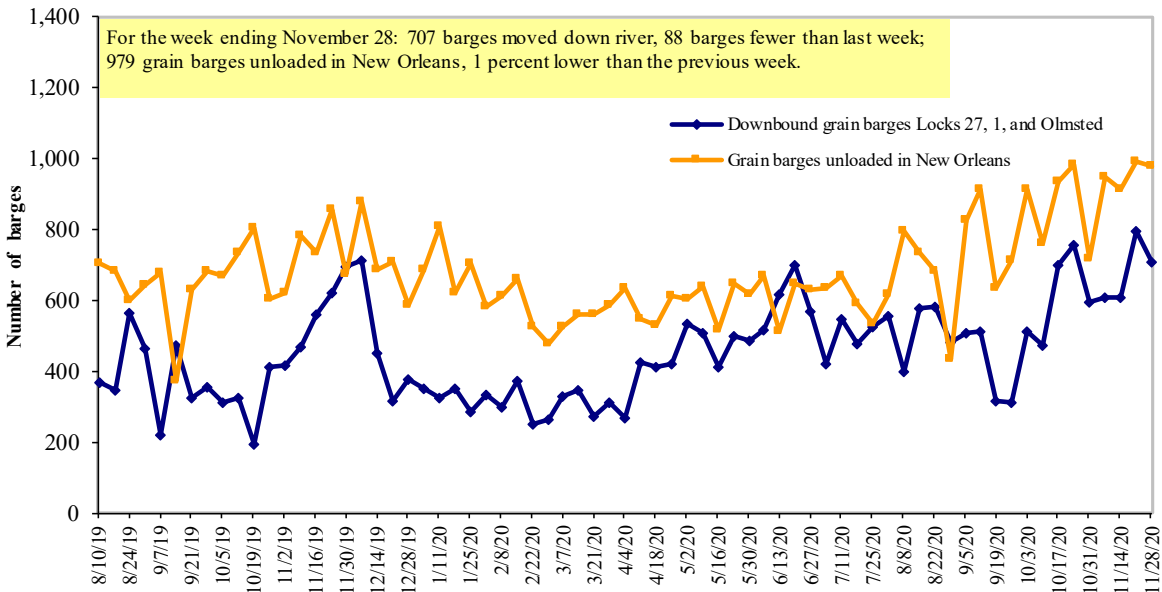
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/30/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.540	0.034	-0.519
	New England	2.575	0.017	-0.503
	Central Atlantic	2.743	0.038	-0.503
	Lower Atlantic	2.400	0.035	-0.528
II	Midwest	2.404	0.045	-0.578
III	Gulf Coast	2.254	0.044	-0.525
IV	Rocky Mountain	2.540	0.025	-0.701
	West Coast	3.040	0.033	-0.664
V	West Coast less California	2.742	0.029	-0.640
	California	3.288	0.035	-0.672
	Total	United States	2.502	0.040

¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

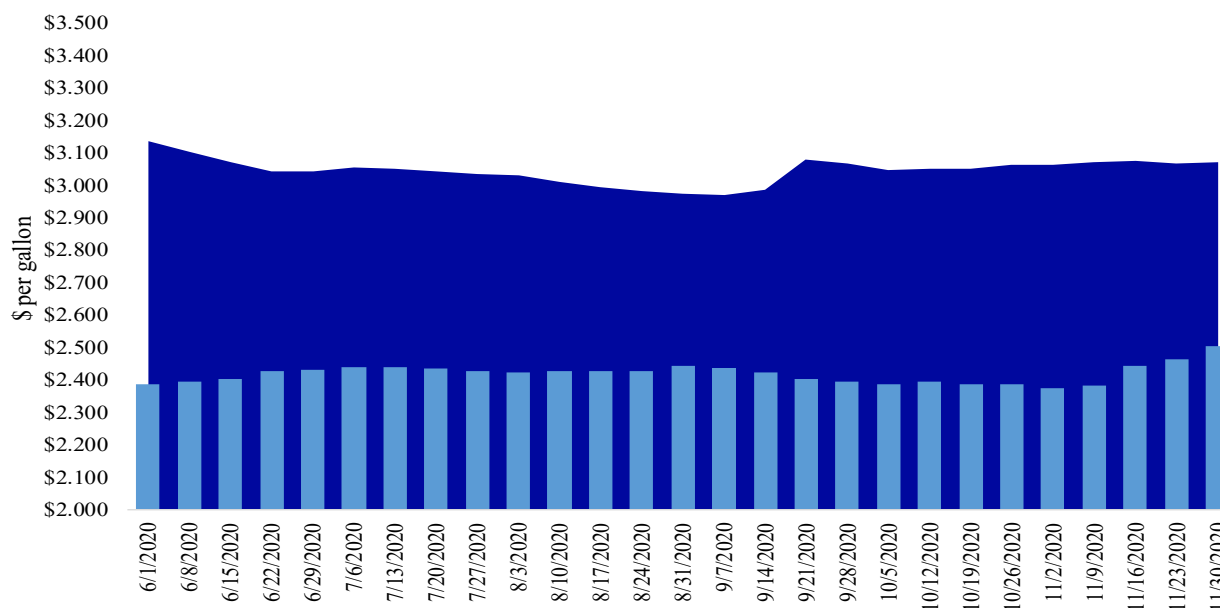
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending November 30, the U.S. average diesel fuel price increased 4.0 cents from the previous week to \$2.502 per gallon, 56.8 cents below the same week last year.

■ Last year ■ Current year
\$3.070 \$2.502



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

Grain Exports

Table 12

U.S. export balances and cumulative exports (1,000 metric tons)

For the week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export balances¹									
11/19/2020	1,533	420	1,510	2,485	177	6,126	27,621	27,297	61,043
This week year ago	1,224	545	1,237	861	211	4,078	8,220	10,771	23,068
Cumulative exports-marketing year²									
2020/21 YTD	4,837	968	3,442	2,304	370	11,920	9,301	24,634	45,855
2019/20 YTD	4,714	1,402	3,279	2,293	462	12,150	5,850	14,490	32,489
YTD 2020/21 as % of 2019/20	103	69	105	100	80	98	159	170	141
Last 4 wks. as % of same period 2019/20*	129	77	124	245	93	143	327	274	270
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 importers¹ of U.S. corn

For the week ending 11/19/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	- 1,000 mt -			
Mexico	7,877	6,818	16	14,869
Japan	4,829	1,832	164	11,221
Columbia	1,973	1,038	90	4,830
Korea	865	25	3,331	4,011
China	11,025	60	18,336	909
Top 5 importers	26,568	9,773	172	35,840
Total U.S. corn export sales	36,922	14,069	162	49,983
% of projected exports	55%	31%		
Change from prior week ²	1,666	807		
Top 5 importers' share of U.S. corn export sales	72%	69%		72%
USDA forecast November 2020	67,430	45,242	49	
Corn use for ethanol USDA forecast, November 2020	128,270	123,241	4	

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers¹ of U.S. soybeans

For the week ending 11/19/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	1,000 mt -			- 1,000 mt -
China	29,192	9,307	214	19,106
Mexico	2,935	2,726	8	4,591
Egypt	1,575	1,116	41	2,980
Indonesia	951	734	30	2,360
Japan	900	934	(4)	2,288
Top 5 importers	35,553	14,817	140	31,324
Total U.S. soybean export sales	51,931	25,261	106	49,352
% of projected exports	87%	55%		
change from prior week ²	768	1,664		
Top 5 importers' share of U.S. soybean export sales	68%	59%		63%
USDA forecast, November 2020	59,946	45,668	131	

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 15

Top 10 importers¹ of all U.S. wheat

For the week ending 11/19/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	1,000 mt -			- 1,000 mt -
Mexico	2,297	2,416	(5)	3,213
Philippines	2,434	2,025	20	2,888
Japan	1,706	1,698	0	2,655
Nigeria	854	987	(13)	1,433
Korea	1,169	867	35	1,372
Indonesia	607	429	41	1,195
Taiwan	771	867	(11)	1,175
Thailand	555	462	20	727
Italy	483	583	(17)	622
Colombia	284	500	(43)	618
Top 10 importers	11,159	10,833	3	15,897
Total U.S. wheat export sales	18,046	16,227	11	23,821
% of projected exports	68%	62%		
change from prior week ²	796	613		
Top 10 importers' share of U.S. wheat export sales	62%	67%		67%
USDA forecast, November 2020	26,567	26,294	1	

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

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

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

Note: A red number in parentheses indicates a negative number.

Source: USDA, Foreign Agricultural Service.

Table 16

Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 11/26/20	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	325	185	176	14,471	12,847	113	95	109	13,961
Corn	135	130	104	8,855	6,986	127	727	95	7,047
Soybeans	495	565	88	11,258	10,927	103	134	173	11,969
Total	955	880	109	34,583	30,760	112	133	141	32,977
Mississippi Gulf									
Wheat	60	8	795	3,338	4,279	78	39	45	4,448
Corn	580	505	115	26,137	19,541	134	148	126	20,763
Soybeans	1,115	1,392	80	30,660	28,110	109	132	124	31,398
Total	1,755	1,904	92	60,136	51,931	116	132	122	56,609
Texas Gulf									
Wheat	39	66	59	4,130	5,807	71	72	58	6,009
Corn	0	32	0	682	579	118	n/a	443	640
Soybeans	124	64	194	1,410	2	n/a	n/a	820	2
Total	163	162	100	6,222	6,388	97	251	169	6,650
Interior									
Wheat	43	70	62	1,986	1,776	112	134	196	1,987
Corn	159	151	105	7,849	7,235	108	79	88	7,857
Soybeans	156	206	76	6,496	6,495	100	136	143	7,043
Total	358	426	84	16,331	15,506	105	105	118	16,887
Great Lakes									
Wheat	32	54	60	805	1,143	70	56	116	1,339
Corn	0	0	n/a	61	11	538	n/a	0	11
Soybeans	47	34	137	852	473	180	n/a	204	493
Total	80	88	90	1,718	1,628	106	230	168	1,844
Atlantic									
Wheat	30	0	n/a	65	37	175	n/a	n/a	37
Corn	0	0	n/a	33	99	33	n/a	3	99
Soybeans	152	90	169	1,404	1,248	113	371	159	1,353
Total	182	90	202	1,503	1,384	109	399	168	1,489
U.S. total from ports*									
Wheat	529	383	138	24,795	25,890	96	85	98	27,781
Corn	874	818	107	43,617	34,452	127	142	112	36,417
Soybeans	2,088	2,350	89	52,081	47,254	110	147	144	52,258
Total	3,492	3,551	98	120,493	107,596	112	135	130	116,457

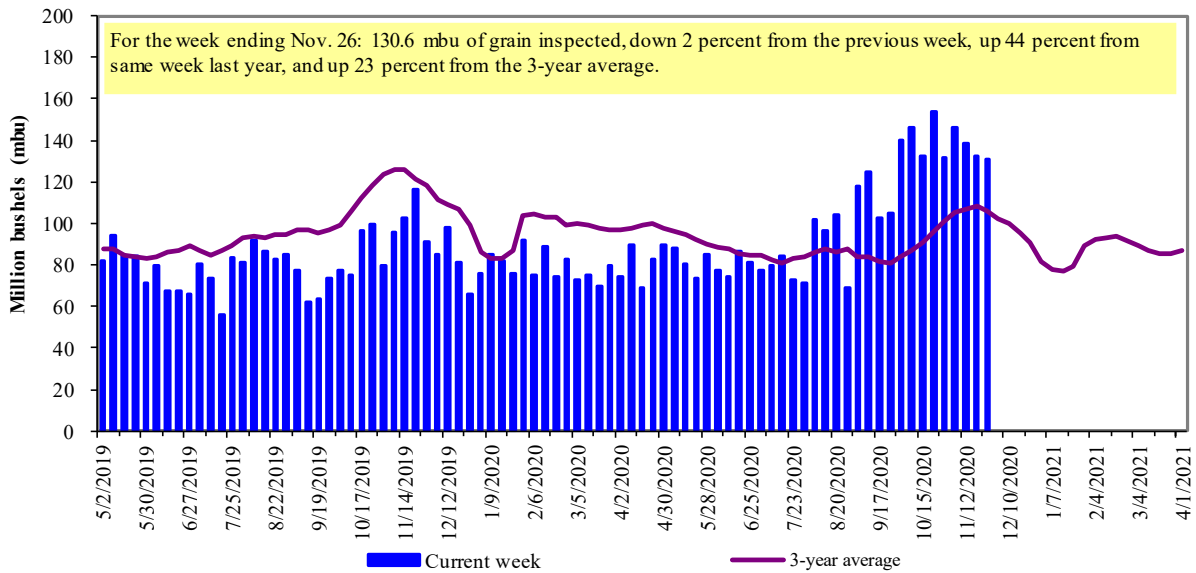
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

Figure 14

U.S. grain inspected for export (wheat, corn, and soybeans)

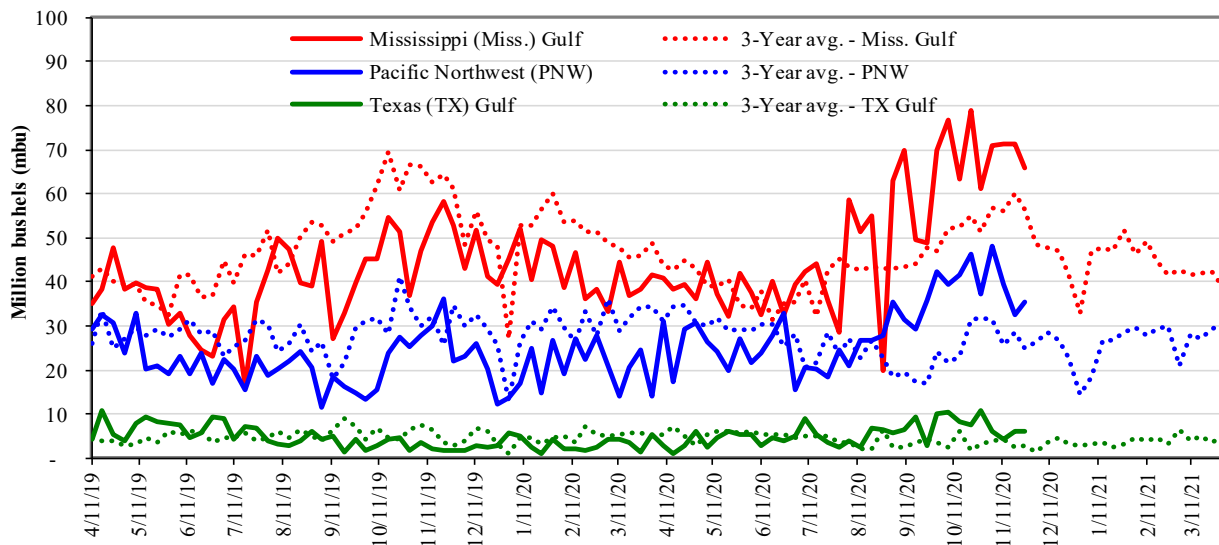


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



Week ending 11/26/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 66.0	Last wk:	down 7	down 1	down 7	up 8
PNW: 35.4	Last Year (same wk):	up 25	up 274	up 32	up 62
TX Gulf: 6.0	3-yr avg. (4-wk. mov. Avg):	up 15	up 83	up 19	up 28

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

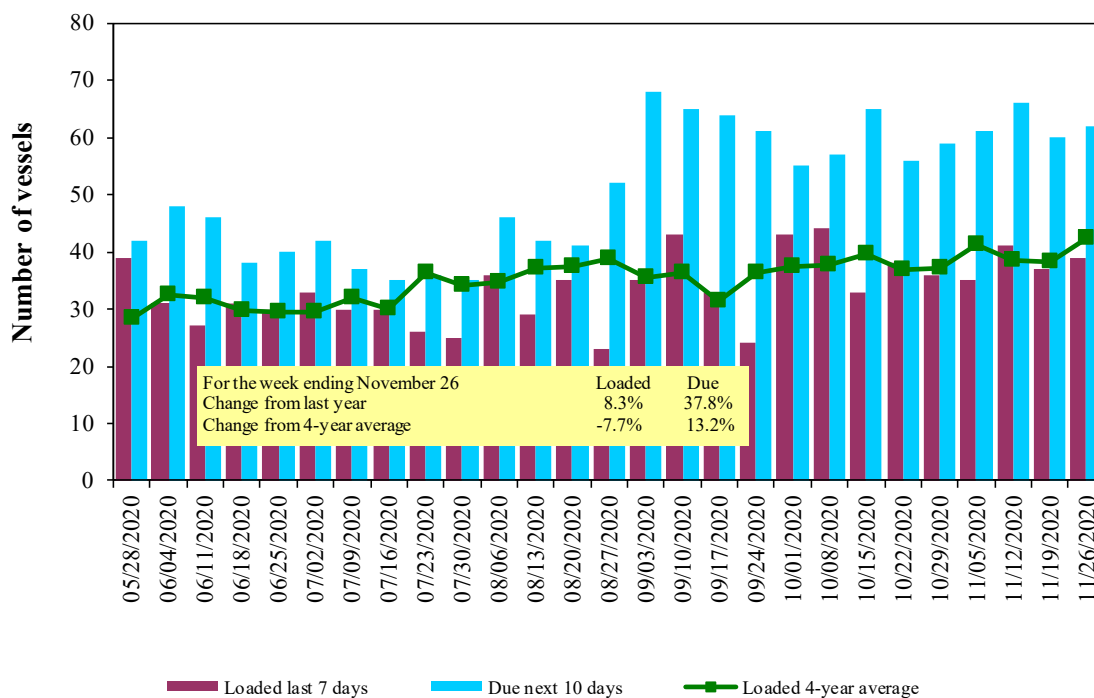
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded	Due next	In port
		7-days	10-days	
11/26/2020	58	39	62	n/a
11/19/2020	59	37	60	20
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service. Note: n/a = not available due to holiday.

Figure 16

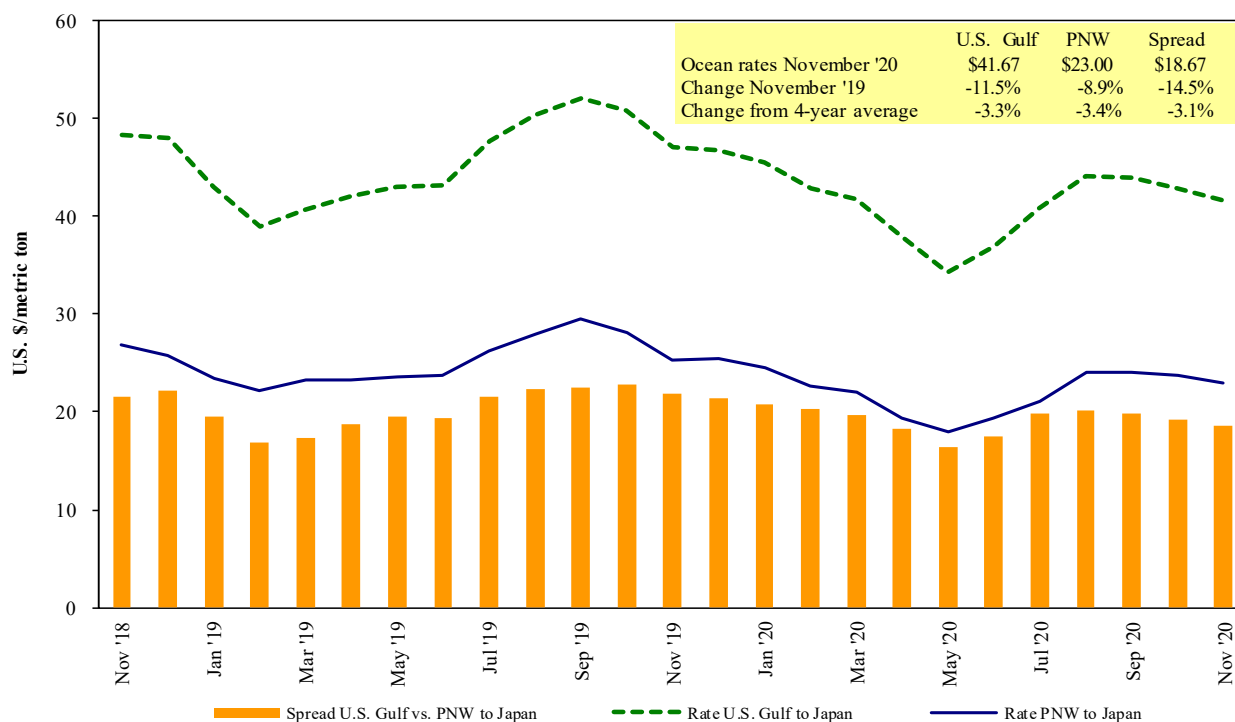
U.S. Gulf¹ vessel loading activity



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

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

Ocean freight rates for selected shipments, week ending 11/28/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Dec 6/11	66,000	39.25
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.

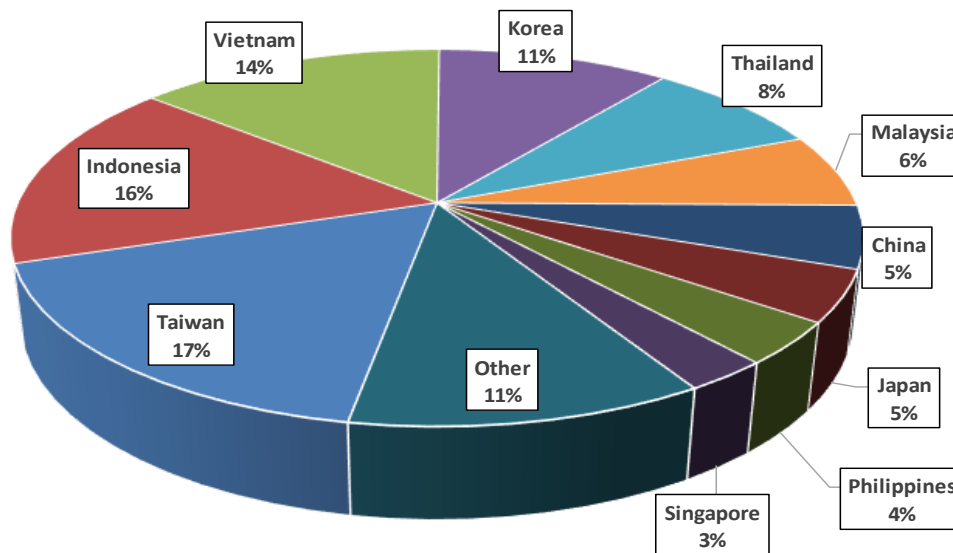
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

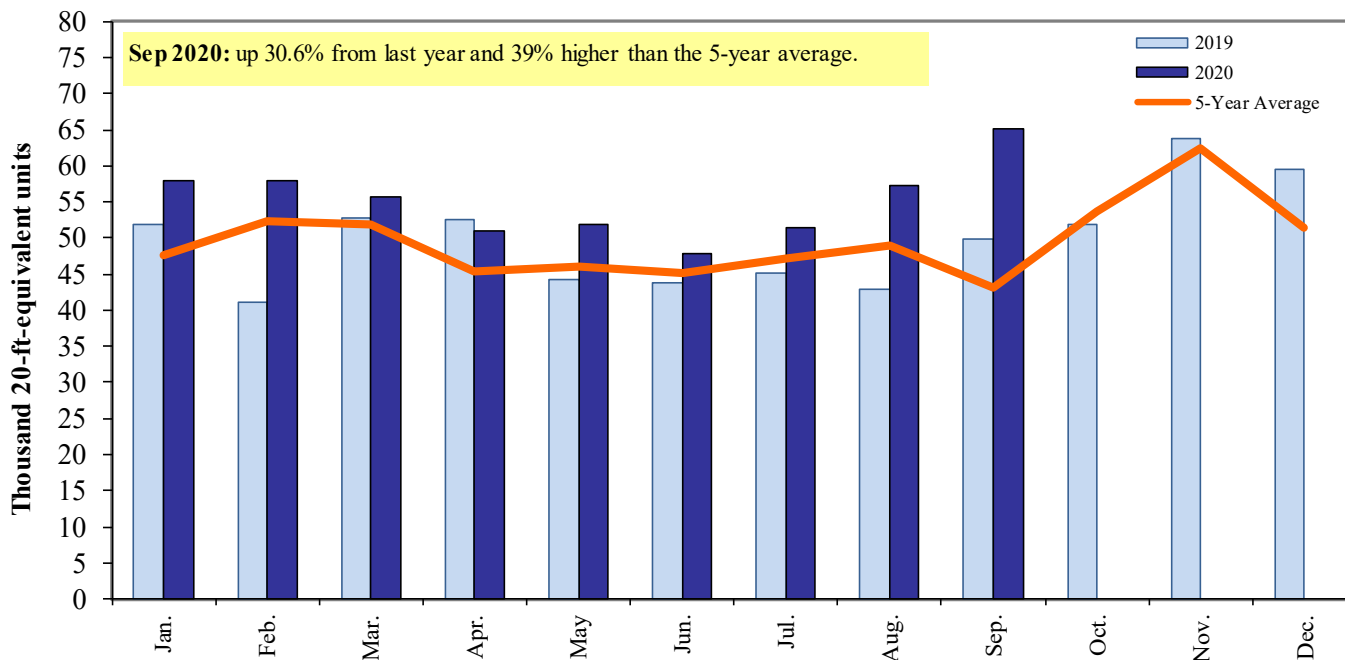
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



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.

Contacts and Links

Coordinators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Maria Williams	maria.williams@usda.gov	(202) 690 - 4430
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299

Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
-------------------------------	--	------------------

Rail Transportation

Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690 - 3244

Barge Transportation

April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299

Truck Transportation

April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299

Grain Exports

Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577

Ocean Transportation

Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@usda.gov	(202) 720 - 7880

Editor

Maria Williams	maria.williams@usda.gov	(202) 690-4430
----------------	--	----------------

Subscription Information: Please sign up to receive regular email announcements of the latest *GTR* issue by entering your email address [here](#) and selecting your preference to receive Transportation Research and Analysis. For any other information, you may contact us at GTRContactUs@usda.gov

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. December 3, 2020. Web: <http://dx.doi.org/10.9752/TS056.12-03-2020>

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at How to File a Program Discrimination Complaint and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C.