USDA United States Department of Agriculture

Grain Transportation Report

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

Contact Us

December 24, 2020

Contents

The next release is December 31, 2020

WEEKLY HIGHLIGHTS

USDA Releases Report on Highway Freight

On December 17, USDA released a new study, *The Importance of Highways to U.S Agriculture*. The report gives stakeholders a strategic overview of the challenges and opportunities for moving freight across the Nation's highways. Major contributions include quantifying the economic significance of the roadways to agriculture, identifying key issues facing U.S. agricultural freight movements by truck, analyzing current and future freight flows, and identifying infrastructure investment gaps. The report's novel approach analyzes select performance challenges on 17 high-volume domestic agriculture highway (HDAH) corridors, which account for more than 80 percent of annual agricultural tonnage by truck. The HDAH-corridor challenges examined include optimal commodity flows, safety, quality infrastructure, and roadway reliability. The report estimates current State-planned highway freight investments will save truck operators $540 million per year and produce total benefits worth more than double the investment costs. The report was produced under a cooperative agreement administered by USDA's Agricultural Marketing Service with the Department of Transportation's Volpe National Transportation Systems Center.

Grain Inspections Rise After 2-Week Decline

For the week ending December 17, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 3.8 million metric tons (mmt). Total grain inspections were up 3 percent from the previous week, up 75 percent from last year, and up 49 percent from the 3-year average. Wheat inspections jumped 49 percent from the previous week as shipments destined primarily to Asia and Latin America increased. Also, from the previous week, soybean inspections increased 5 percent, but corn inspections decreased 17 percent as shipments to Latin America receded notably. Pacific Northwest (PNW) grain inspections increased 1 percent from the previous week, but Mississippi Gulf inspections remained unchanged. During the last 4 weeks, grain inspections were 64 percent above the same time last year and 53 percent above the 3-year average.

OOIDA Requests Adding "Feed" to FMCSA's List of Qualifying Agricultural Commodities

On December 17, the Owner-Operator Independent Drivers Association filed comments asking the Federal Motor Carrier Safety Administration (FMCSA) to add "feed ingredients" to its list of qualifying agricultural commodities. Proposing the change for FMCSA's interim final rule on the definition, OOIDA maintains feed ingredients are integral to agricultural and livestock supply chains. Furthermore, given the unpredictable nature of the feed production process, drivers often experience lengthy delays at processing and distribution facilities. To maximize efficiency and clarity for drivers, OOIDA argues feed ingredients should be covered in the agricultural commodities definition.

Snapshots by Sector

Export Sales

For the week ending December 10, **unshipped balances** of wheat, corn, and soybeans totaled 57.4 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 1.925 mmt, up 41 percent from the past week. Net **soybean export sales** were 0.922 mmt, up 62 percent from the previous week. Net **wheat export sales** were 0.540 mmt, down 12 percent from the previous week.

Rail

U.S. Class I railroads originated 28,390 **grain carloads** during the week ending December 12. This was a 2-percent increase from the previous week, 37 percent more than last year, and 27 percent more than the 3-year average.

Average January shuttle **secondary railcar** bids/offers (per car) were $440 above tariff for the week ending December 17. This was $99 more than last week and $808 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending December 19, **barge grain movements** totaled 996,816 tons. This was 11 percent less than the previous week and 109 percent more than the same period last year.

For the week ending December 19, 617 grain barges **moved down river**—86 barges fewer than the previous week. There were 1,092 grain barges **unloaded in New Orleans**, 7 percent higher than the previous week.

Ocean

For the week ending December 17, 43 **oceangoing grain vessels** were loaded in the Gulf—65 percent more than the same period last year. Within the next 10 days (starting December 18), 52 vessels were expected to be loaded—30 percent more than the same period last year.

As of December 17, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $42.00. This was 1 percent higher than the previous week. The rate from PNW to Japan was $23.75 per mt, 2 percent higher than the previous week.

Fuel

For the week ending December 21, the U.S. average **diesel fuel price** increased 6 cents from the previous week to $2.619 per gallon, 42.2 cents below the same week last year.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* December 24, 2020.
Web: **http://dx.doi.org/10.9752/TS056.12-24-2020**

Feature Article/Calendar

Date	Event	Format	Website for More Information
	The following list contains information and links to upcoming events in 2021, most of which are online or virtual.		
Jan. 11	**AgTC/USDA Ag Shipper Workshop** Each year, the Agriculture Transportation Coalition (AgTC) and USDA offer a series of Ag Shipper Workshops, convening exporters to discuss the state of agricultural transportation.	Online	https://agtrans.org/events/
Jan. 20	**Midwest Association of Rail Shippers Winter Meeting** The association's 255th meeting (online for the first time) will feature presentations from Canadian Pacific Railway, BNSF Railway, GATX Corporation, and others.	Online	https://www.mwrailshippers.com/event/2021-winter-meeting/
Jan. 20-22	**TEGMA 2021 Annual Meeting** The Transportation, Elevator and Grain Merchants Association (TEGMA) provides a forum for the grain-based agribusiness industry to debate, discuss, and find resolution of operational and business issues. Various industry representatives will present.	Online	https://www.tegma.org/2021-annual-meeting
Jan. 21-22 & 25-29	**2021 Transportation Research Board (TRB) Annual Meeting** At the 100th annual TRB meeting, a number of sessions and workshops will focus on the 2021 meeting's spotlight theme, "Launching a New Century of Mobility and Quality of Life." The meeting will also focus on how COVID-19 has affected transportation and how transportation professionals and researchers have responded.	Online	http://www.trb.org/AnnualMeeting/AnnualMeeting.aspx
Jan. 25	**AgTC/USDA Ag Shipper Workshop** Each year, the Agriculture Transportation Coalition (AgTC) and USDA offer a series of Ag Shipper Workshops, convening exporters to discuss the state of agricultural transportation.	Online	https://agtrans.org/events/
Feb. 2-6	**National Association of Wheat Growers 2021 Wheat Industry Meeting** The National Association of Wheat Growers will host its 2021 Wheat Industry Winter Meeting in Washington, DC. The conference agenda will be updated soon.	In-Person	https://www.wheatworld.org/newsroom/meetings-events/wheat-industry-winter-conference/
Feb. 10-11	**39th Annual Mississippi Valley Trade and Transport Conference** The Mississippi Valley Trade and Transport Council will host its Annual Mississippi Valley Trade and Transport Conference in New Orleans, LA. Panelists will discuss many topics, including commodities, river statistics, and port updates.	In-Person	http://mvttc.com/mvttc_conference/
Feb. 18-19	**USDA's Agricultural Outlook Forum** This year will mark USDA's 97th annual Forum. Its theme is "Building on Innovation: A Pathway to Resilience."	Online	https://www.usda.gov/oce/ag-outlook-forum
Feb. 23-24	**Waterway Council, Inc., Annual Washington Meeting** The Waterway Council will host its 2021 Annual Washington Meeting in Washington, DC. Past meetings have featured keynote speakers from the Congress, government agencies, and industry and addressed important and timely waterways legislation and infrastructure issues.	In-Person	https://waterwayscouncil.org/get-involved/annual-washington-meetings
Mar. 8-10	**National Waterways Conference 2021 Legislative Summit** The National Waterways Conference will host its 2021 Legislative Summit in Washington, DC. Addressing waterways legislation and infrastructure issues, past speakers have hailed from Congress, government agencies, and industry.	TBD	https://waterways.org/future-meetings/
Mar. TBD	**Freight Waves Intermodal Summit** Freight Waves Live will host a virtual Intermodal Summit. The Summit will examine the impact of the volatility and uncertainty in 2020 on the intermodal sector and discuss the outlook for rail and intermodal in 2021.	Online	https://live.freightwaves.com/intermodal-summit
Apr. 6-8	**Transportation Research Forum's (TRF) 62nd Annual Meeting** TRF will hold its 2021 annual meeting virtually over 3 days for 2 hours in the morning followed by another 2 hours later in the day. Sessions will cover topics in transportation, logistics, and economics.	Online	http://annualforum.trforum.org/

Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
12/23/20	176	288	239	229	188	168
12/16/20	172	288	233	239	186	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.

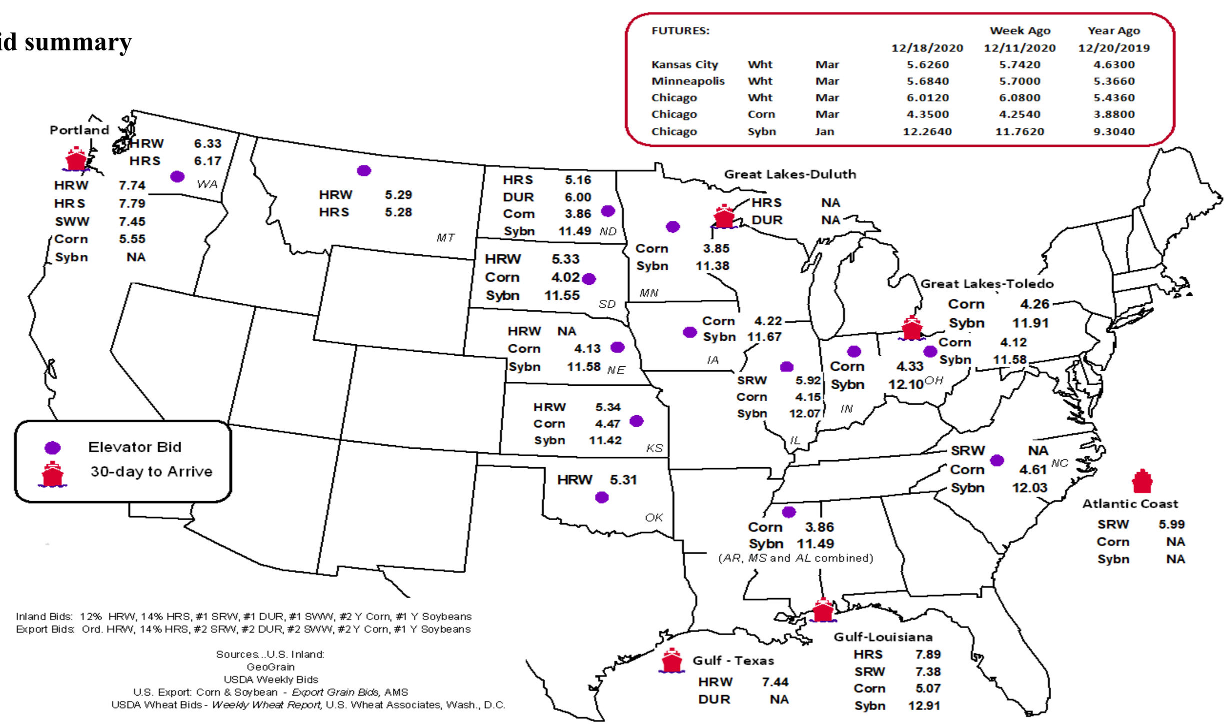
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	12/18/2020	12/11/2020
Corn	IL–Gulf	-0.92	-0.76
Corn	NE–Gulf	-0.94	-0.92
Soybean	IA–Gulf	-1.24	-1.22
HRW	KS–Gulf	-2.10	-2.10
HRS	ND–Portland	-2.63	-2.59

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]
12/16/2020[p]	1,713	1,874	7,909	1,054	12,550	12/12/2020	1,939
12/09/2020[r]	2,364	2,081	7,911	1,108	13,464	12/5/2020	2,275
2020 YTD[r]	42,300	60,860	284,262	22,636	410,058	2020 YTD	121,600
2019 YTD[r]	40,541	50,605	248,020	16,095	355,261	2019 YTD	124,664
2020 YTD as % of 2019 YTD	104	120	115	141	115	% change YTD	98
Last 4 weeks as % of 2019[2]	409	445	178	672	234	Last 4wks. % 2019	90
Last 4 weeks as % of 4-year avg.[2]	402	177	135	218	162	Last 4wks. % 4 yr.	101
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,674

[1]Data is incomplete as it is voluntarily provided.

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

[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads.

to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

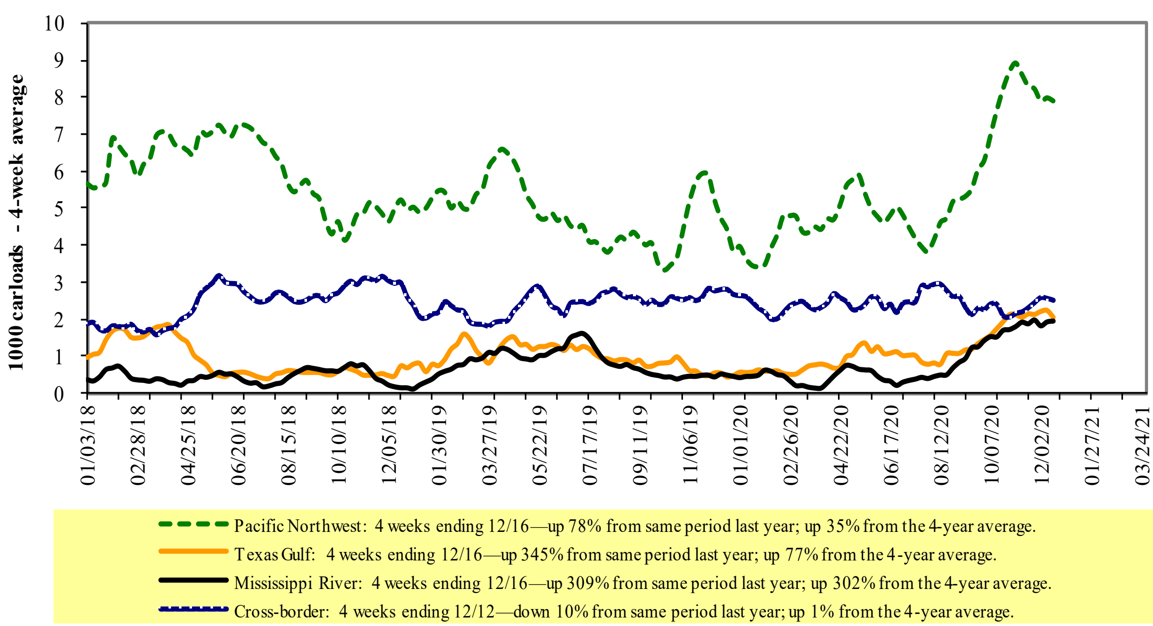
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending:	East		West			U.S. total	Canada	
12/12/2020	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,933	2,736	15,795	974	6,952	28,390	5,594	5,967
This week last year	1,554	2,237	11,424	870	4,692	20,777	5,492	4,596
2020 YTD	86,065	124,064	576,138	54,787	277,228	1,118,282	225,091	245,101
2019 YTD	88,830	132,634	548,835	56,617	251,684	1,078,600	205,665	227,253
2020 YTD as % of 2019 YTD	97	94	105	97	110	104	109	108
Last 4 weeks as % of 2019*	134	119	116	105	145	123	132	120
Last 4 weeks as % of 3-yr. avg.**	124	112	115	114	140	121	142	122
Total 2019	91,611	136,940	568,369	58,527	260,269	1,115,716	212,348	235,892

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

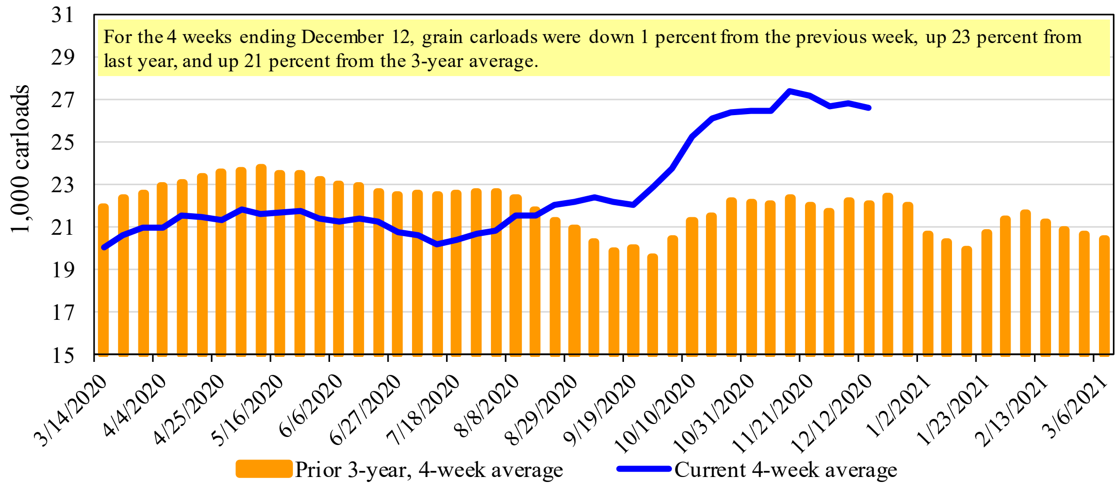
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 12/17/2020		Jan-21	Jan-20	Feb-21	Feb-20	Mar-21	Mar-20	Apr-21	Apr-20
		Delivery period							
BNSF[3]	COT grain units	1	0	0	no bid	0	no bid	0	no bid
	COT grain single-car	401	0	236	0	128	0	0	0
UP[4]	GCAS/Region 1	no offer	n/a	no offer	n/a	no offer	n/a	n/a	n/a
	GCAS/Region 2	no offer	n/a	no offer	n/a	no offer	n/a	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.

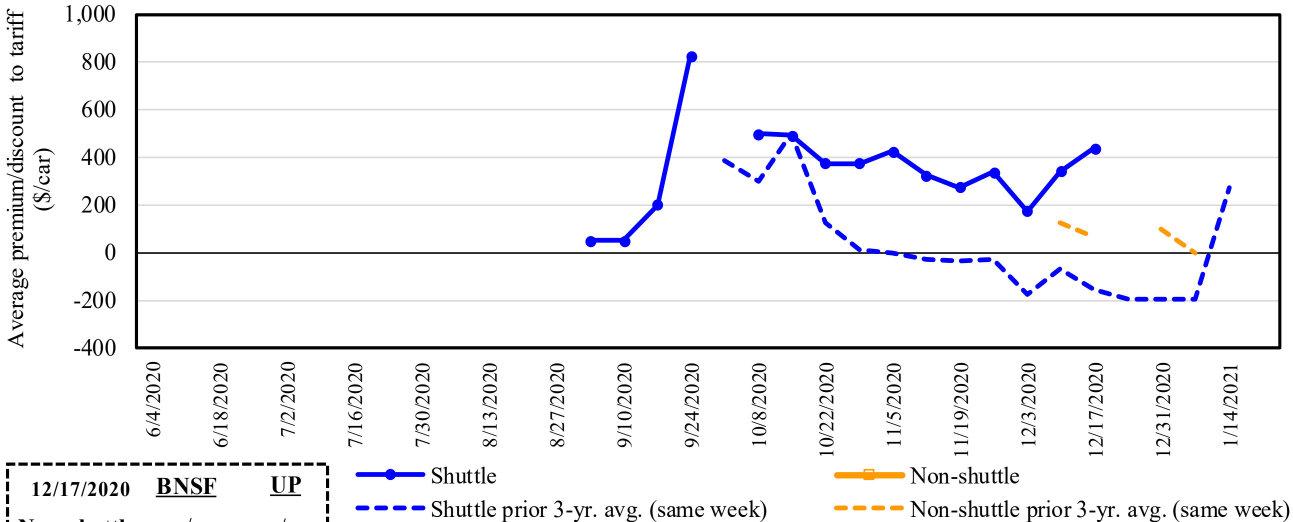
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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 January 2021, secondary market



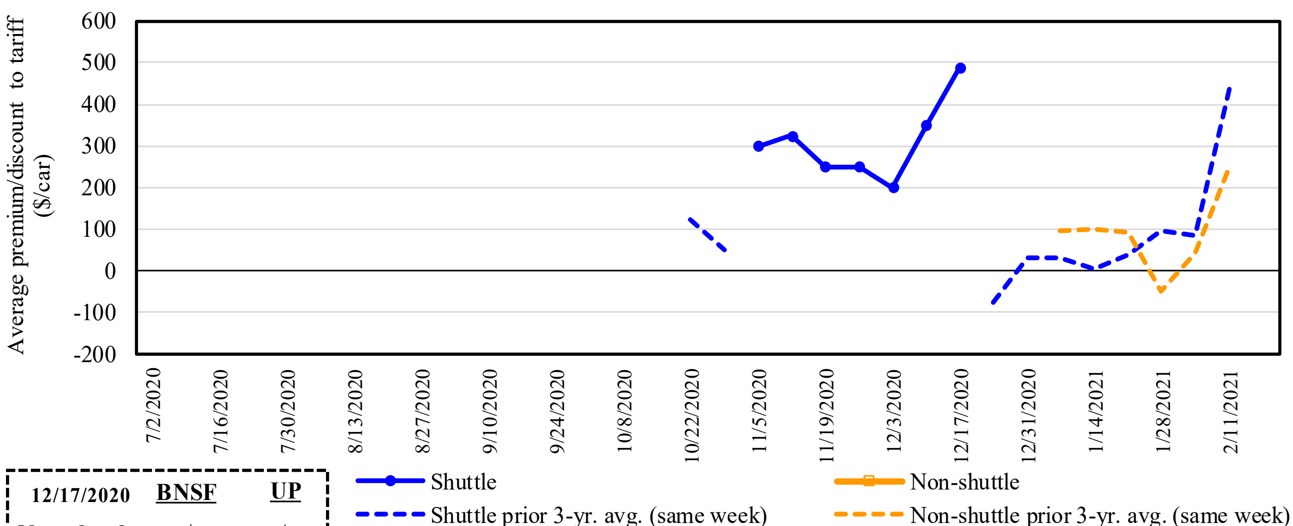
12/17/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$550	$329

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $99 this week and are $385 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 February 2021, secondary market



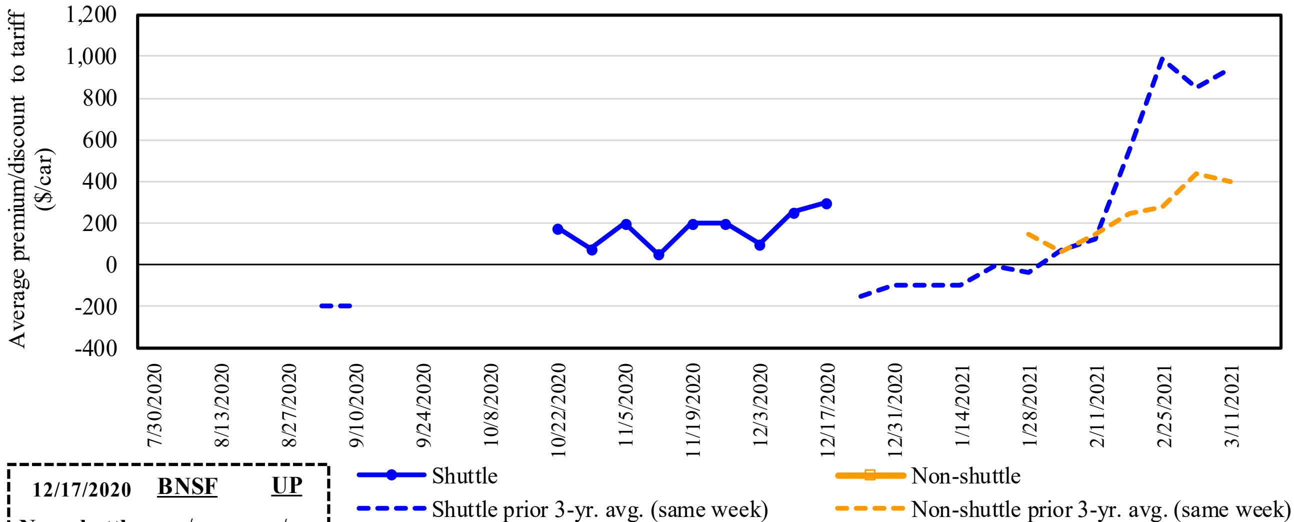
12/17/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$600	$375

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $138 this week and are at the peak.

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

Figure 6

Bids/offers for railcars to be delivered in March 2021, secondary market



12/17/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$325	$275

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $47 this week and are at the peak.

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

Table 6

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

	For the week ending: 12/17/2020	Delivery period Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-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**	**550**	**600**	**325**	**138**	**(50)**	**0**
	Change from last week	119	100	19	138	(6)	n/a
	Change from same week 2019	975	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**329**	**375**	**275**	**(8)**	**n/a**	**n/a**
	Change from last week	79	175	75	42	n/a	n/a
	Change from same week 2019	642	n/a	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]

December 2020	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,983	$30	$39.85	$1.08	-2
	Grand Forks, ND	Duluth-Superior, MN	$4,208	$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
	Amarillo, TX	Los Angeles, CA	$5,121	$81	$51.66	$1.41	-4
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$60	$39.33	$1.00	-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
	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
Soybeans	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
	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	$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

[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: December 2020							
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	Tlalnepantla, 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

[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.

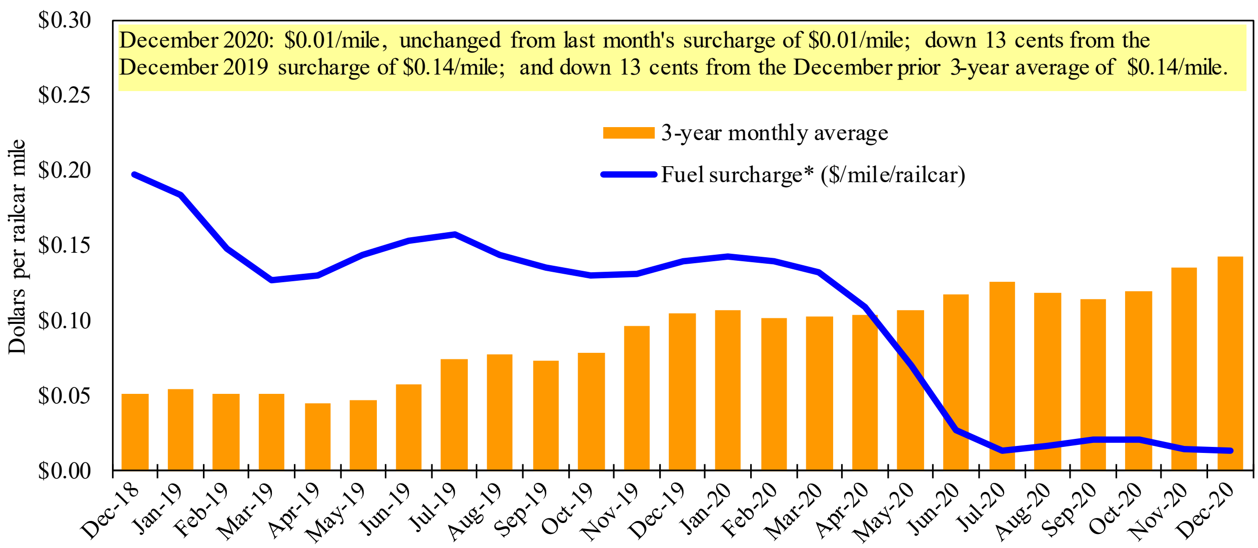
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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

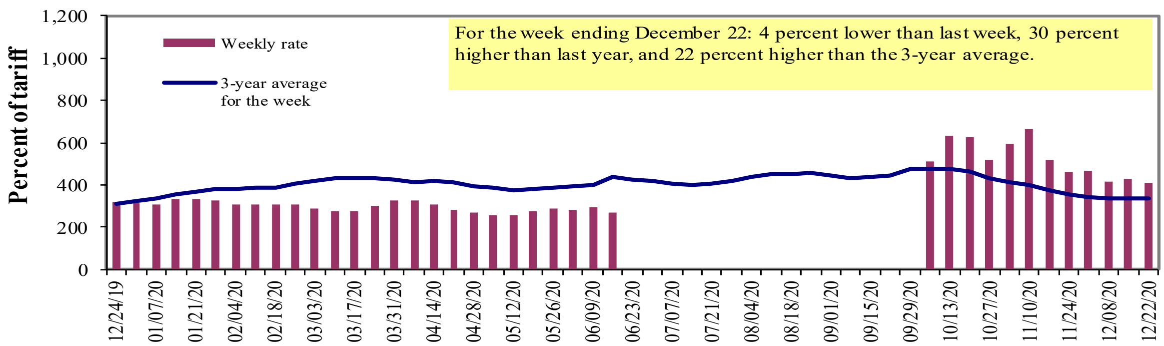
Railroad fuel surcharges, North American weighted average[1]



[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]	12/22/2020	-	-	413	308	353	353	274
	12/15/2020	-	-	431	301	405	405	299
$/ton	12/22/2020	-	-	19.16	12.29	16.56	14.26	8.60
	12/15/2020	-	-	20.00	12.01	18.99	16.36	9.39
Current week % change from the same week:								
	Last year	-	-	30	37	49	49	30
	3-year avg. [2]	-	-	22	24	23	23	24
Rate[1]	January	-	-	411	294	341	341	268
	March	-	-	379	275	310	310	256

[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

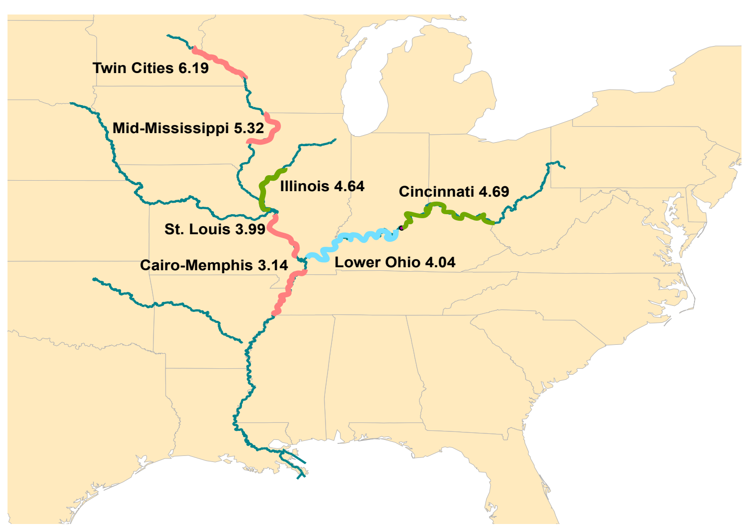
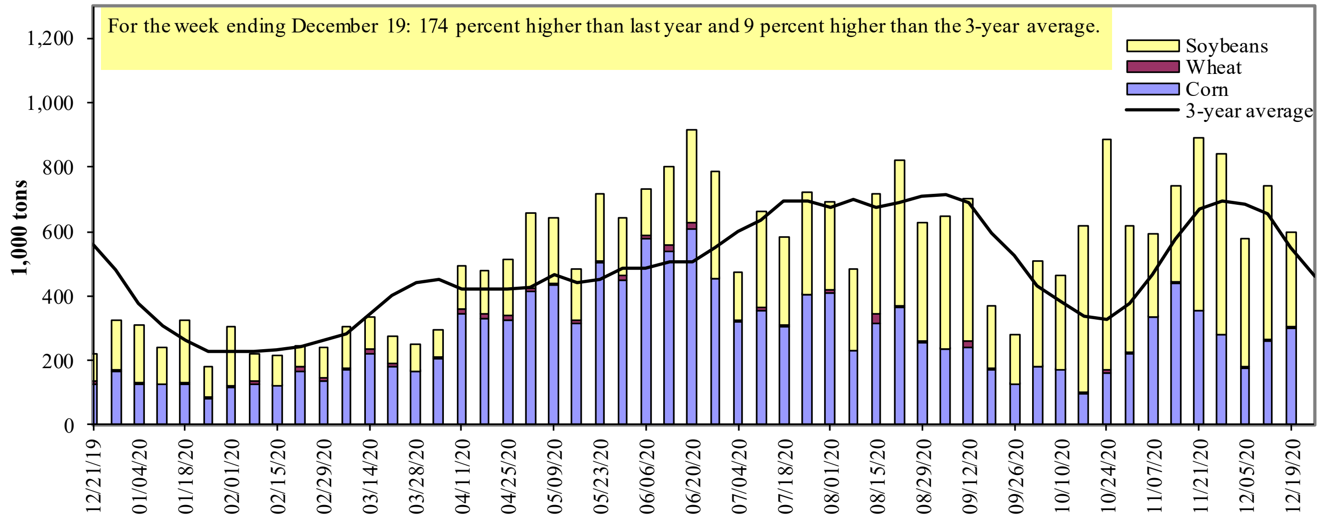


Figure 10

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 12/19/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	2	0	0	0	2
Winfield, MO (L25)	116	0	157	0	273
Alton, IL (L26)	311	0	284	2	596
Granite City, IL (L27)	301	2	294	2	597
Illinois River (La Grange)	209	0	159	2	369
Ohio River (Olmsted)	116	5	239	0	360
Arkansas River (L1)	0	4	35	0	39
Weekly total - 2020	417	11	568	2	997
Weekly total - 2019	152	44	273	9	478
2020 YTD[1]	18,018	1,740	18,325	224	38,308
2019 YTD[1]	12,533	1,615	14,353	152	28,653
2020 as % of 2019 YTD	144	108	128	148	134
Last 4 weeks as % of 2019[2]	108	60	136	171	123
Total 2019	12,780	1,631	14,683	154	29,247

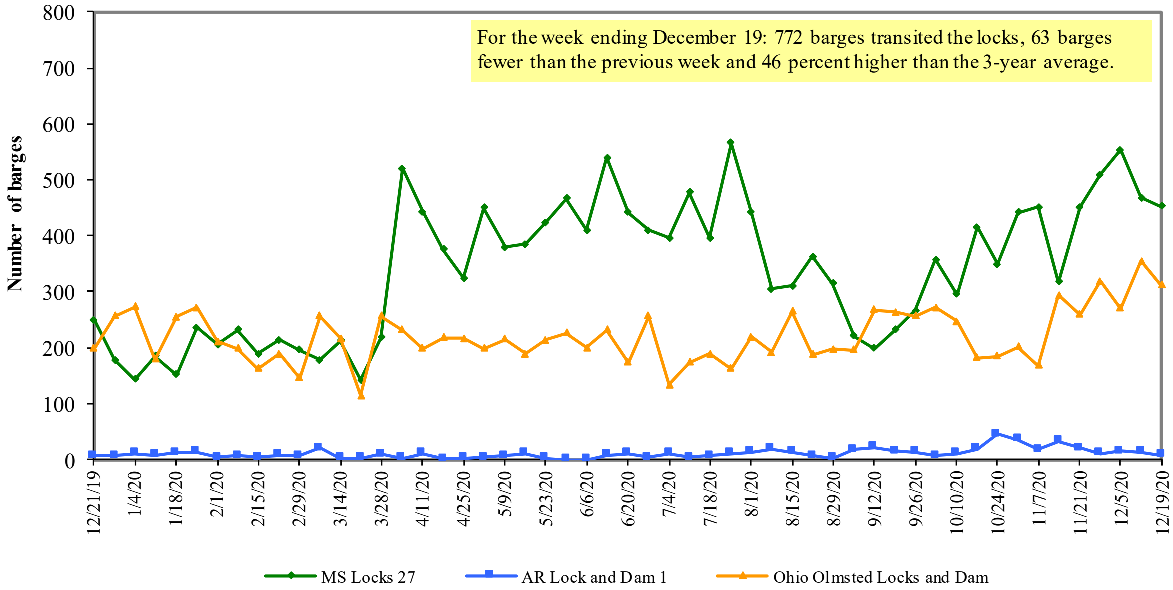
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

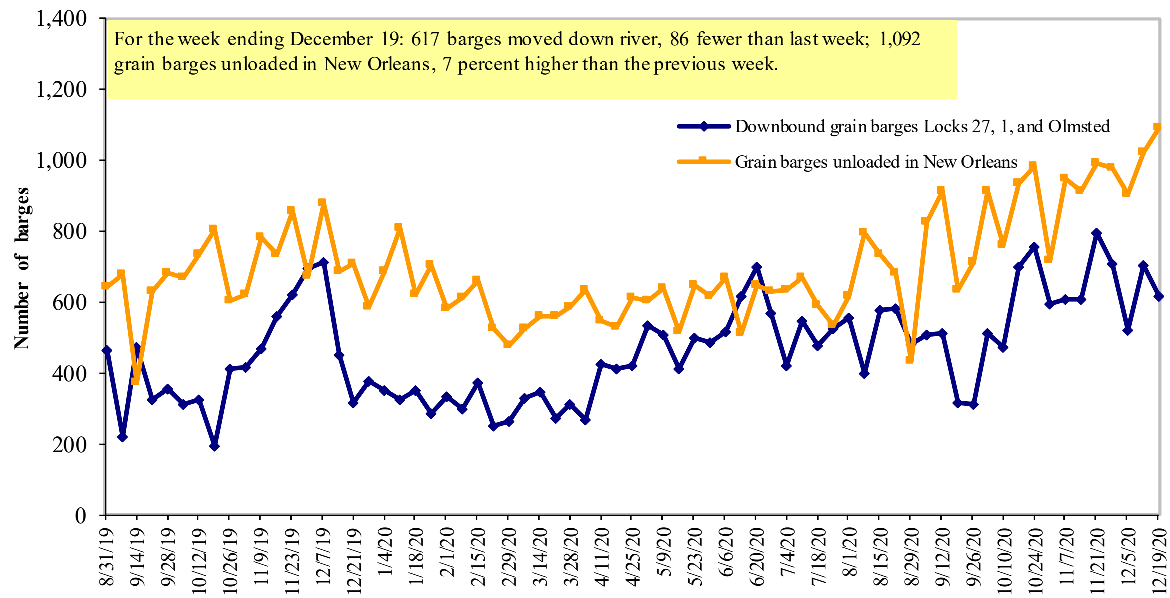
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 12/21/2020 (U.S. $/gallon)

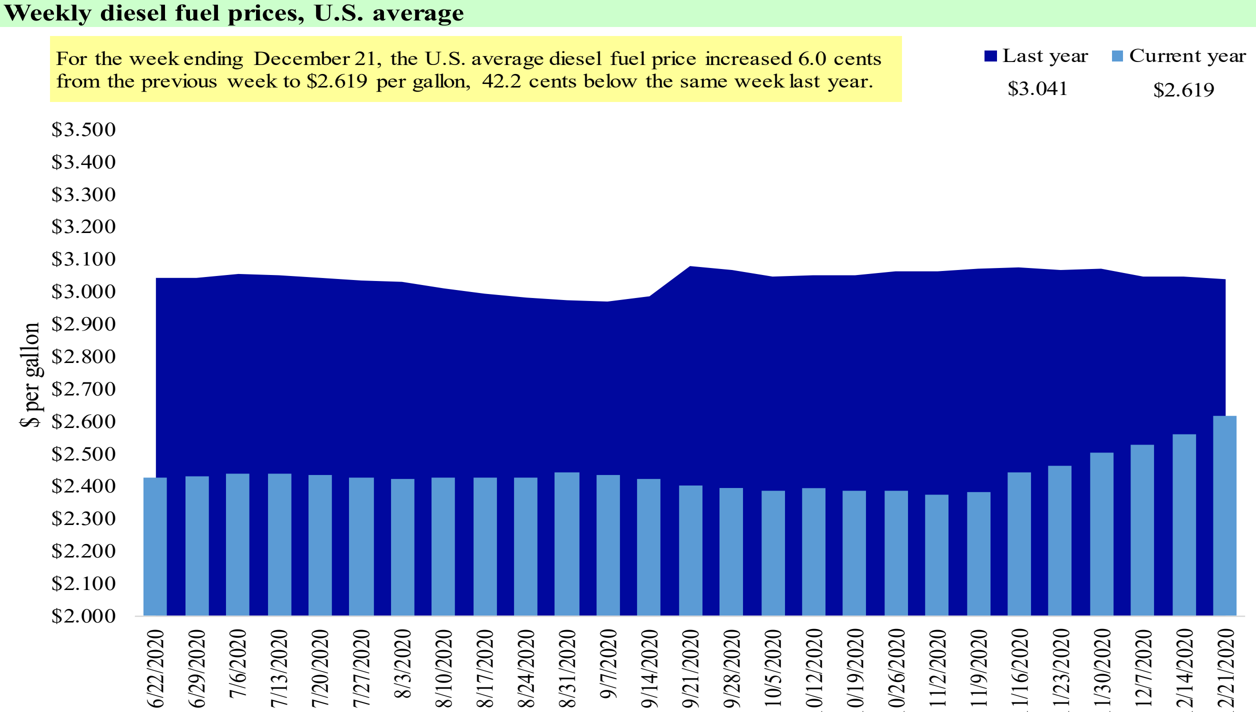
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.652	0.049	-0.400
	New England	2.634	0.027	-0.464
	Central Atlantic	2.835	0.033	-0.410
	Lower Atlantic	2.533	0.062	-0.380
II	Midwest	2.559	0.081	-0.409
III	Gulf Coast	2.379	0.072	-0.384
IV	Rocky Mountain	2.582	0.026	-0.545
V	West Coast	3.097	0.024	-0.497
	West Coast less California	2.768	0.017	-0.484
	California	3.370	0.028	-0.496
Total	United States	2.619	0.060	-0.422

[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]									
12/10/2020	1,645	438	1,595	2,649	159	6,486	29,527	21,422	57,435
This week year ago	1,441	542	1,374	1,028	141	4,525	9,603	9,588	23,716
Cumulative exports-marketing year[2]									
2020/21 YTD	5,251	1,028	3,846	2,604	433	13,163	12,053	32,407	57,623
2019/20 YTD	5,134	1,485	3,632	2,490	560	13,301	7,596	18,837	39,734
YTD 2020/21 as % of 2019/20	102	69	106	105	77	99	159	172	145
Last 4 wks. as % of same period 2019/20*	109	76	111	248	118	138	296	253	248
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 12/10/2020	Total commitments[2] 2020/21 current MY	Total commitments[2] 2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
	- 1,000 mt -			
Mexico	9,657	8,532	13	14,869
Japan	5,146	2,460	109	11,221
Columbia	1,909	1,281	49	4,830
Korea	1,060	26	4,008	4,011
China	11,552	60	19,218	909
Top 5 importers	**29,324**	**12,359**	**137**	**35,840**
Total U.S. corn export sales	**41,580**	**17,198**	**142**	**49,983**
% of projected exports	62%	38%		
Change from prior week[2]	**1,925**	**1,709**		
Top 5 importers' share of U.S. corn export sales	71%	72%		72%
USDA forecast December 2020	**67,430**	**45,242**	**49**	
Corn use for ethanol USDA forecast, December 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 12/10/2020	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	31,274	10,537	197	19,106
Mexico	3,384	2,787	21	4,591
Egypt	1,660	1,229	35	2,980
Indonesia	1,029	833	24	2,360
Japan	1,059	1,106	(4)	2,288
Top 5 importers	**38,404**	**16,492**	**133**	**31,324**
Total U.S. soybean export sales	**53,829**	**28,425**	**89**	**49,352**
% of projected exports	90%	62%		
change from prior week[2]	**922**	**1,431**		
Top 5 importers' share of U.S. soybean export sales	71%	58%		**63%**
USDA forecast, December 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 12/10/2020	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	2,590	2,599	(0)	3,213
Philippines	2,501	2,264	10	2,888
Japan	1,880	1,884	(0)	2,655
Nigeria	907	991	(8)	1,433
Korea	1,353	1,003	35	1,372
Indonesia	707	581	22	1,195
Taiwan	856	869	(2)	1,175
Thailand	693	630	10	727
Italy	534	624	(14)	622
Colombia	292	510	(43)	618
Top 10 importers	**12,312**	**11,956**	3	**15,897**
Total U.S. wheat export sales	**19,649**	**17,827**	10	**23,821**
% of projected exports	73%	68%		
change from prior week[2]	**540**	**869**		
Top 10 importers' share of U.S. wheat export sales	63%	67%		67%
USDA forecast, December 2020	**26,839**	**26,294**	2	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2018/19; Marketing year (MY) = Jun 1 - May 31.
[2] Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.
[3] FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.
Note: A red number in parentheses indicates a negative number.
Source: USDA, Foreign Agricultural Service.

Table 16

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

Port regions	For the week ending 12/17/20	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	265	235	112	15,382	13,718	112	119	104	13,961
Corn	247	137	181	9,437	7,027	134	n/a	162	7,047
Soybeans	437	569	77	13,115	11,897	110	168	190	11,969
Total	**949**	**940**	**101**	**37,933**	**32,643**	**116**	**174**	**150**	**32,977**
Mississippi Gulf									
Wheat	14	0	n/a	3,375	4,436	76	46	40	4,448
Corn	325	541	60	27,459	20,532	134	151	114	20,763
Soybeans	1,740	1,542	113	35,635	30,588	117	170	178	31,398
Total	**2,079**	**2,082**	**100**	**66,470**	**55,555**	**120**	**160**	**152**	**56,609**
Texas Gulf									
Wheat	17	26	67	4,221	5,967	71	64	47	6,009
Corn	13	15	88	711	608	117	99	95	640
Soybeans	169	123	138	1,901	2	n/a	n/a	n/a	2
Total	**200**	**164**	**122**	**6,833**	**6,577**	**104**	**307**	**217**	**6,650**
Interior									
Wheat	61	15	394	2,148	1,980	108	88	127	1,987
Corn	140	196	71	8,420	7,738	109	108	116	7,857
Soybeans	168	165	102	6,965	6,910	101	118	131	7,043
Total	**368**	**376**	**98**	**17,533**	**16,628**	**105**	**108**	**123**	**16,887**
Great Lakes									
Wheat	55	0	n/a	891	1,314	68	53	76	1,339
Corn	24	19	125	105	11	921	n/a	n/a	11
Soybeans	62	43	147	1,087	473	230	n/a	477	493
Total	**141**	**62**	**228**	**2,082**	**1,798**	**116**	**196**	**205**	**1,844**
Atlantic									
Wheat	0	0	n/a	65	37	175	n/a	n/a	37
Corn	0	0	n/a	33	99	33	n/a	0	99
Soybeans	89	91	98	1,701	1,344	127	382	212	1,353
Total	**89**	**91**	**98**	**1,799**	**1,480**	**122**	**408**	**222**	**1,489**
U.S. total from ports*									
Wheat	412	277	149	26,082	27,453	95	95	90	27,781
Corn	750	908	83	46,164	36,015	128	171	123	36,417
Soybeans	2,666	2,531	105	60,404	51,214	118	184	191	52,258
Total	**3,827**	**3,716**	**103**	**132,650**	**114,683**	**116**	**164**	**153**	**116,457**

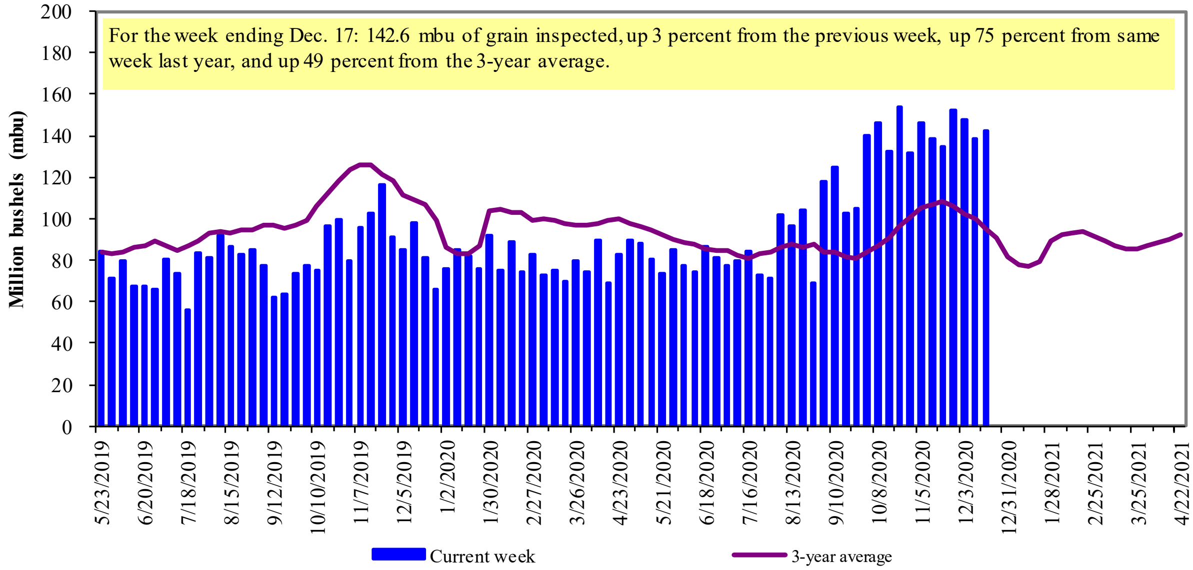
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

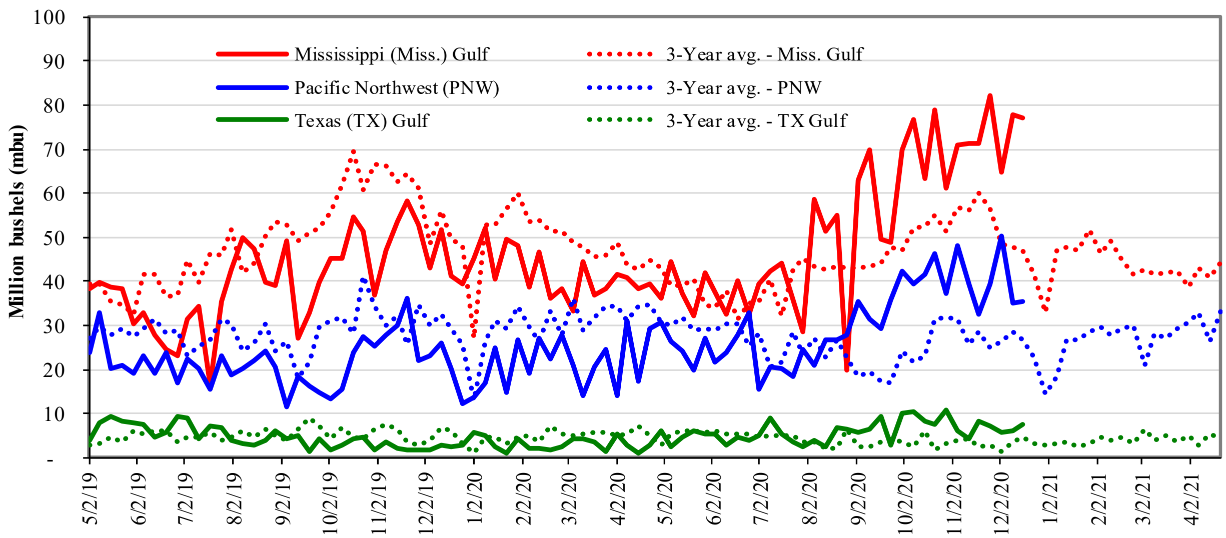


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 12/17/20 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	77.3	Last wk:	unchanged	up 22	unchanged	up 2
PNW:	35.5	Last Year (same wk):	up 88	up 191	up 94	up 77
TX Gulf:	7.4	3-yr avg. (4-wk. mov. Avg):	up 55	up 142	up 60	up 34

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

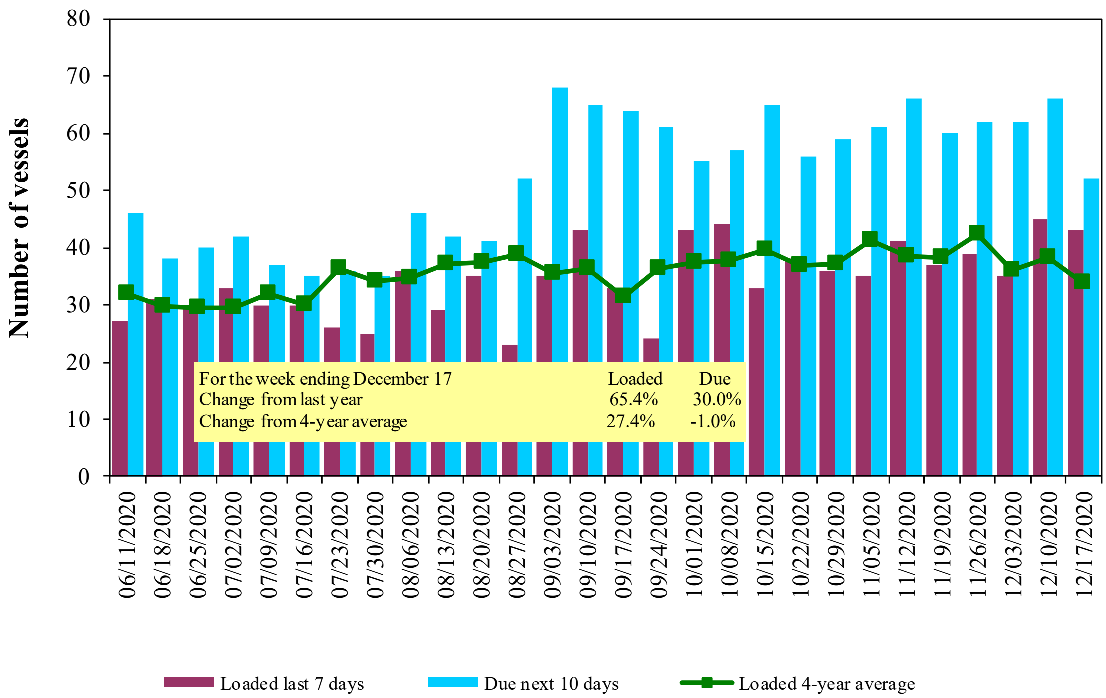
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
12/17/2020	59	43	52	19
12/10/2020	52	45	66	20
2019 range	(26…61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Note: n/a = not available due to holiday.

Figure 16

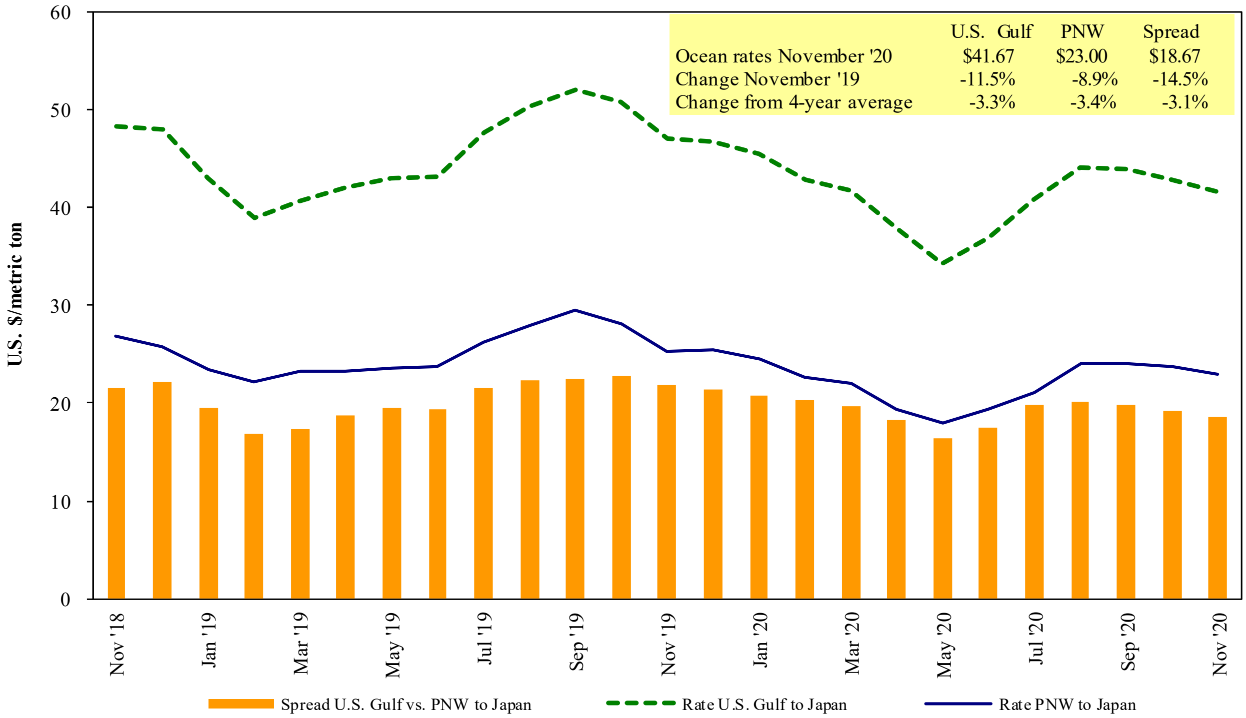
U.S. Gulf[1] vessel loading activity



[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 12/19/2020

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.

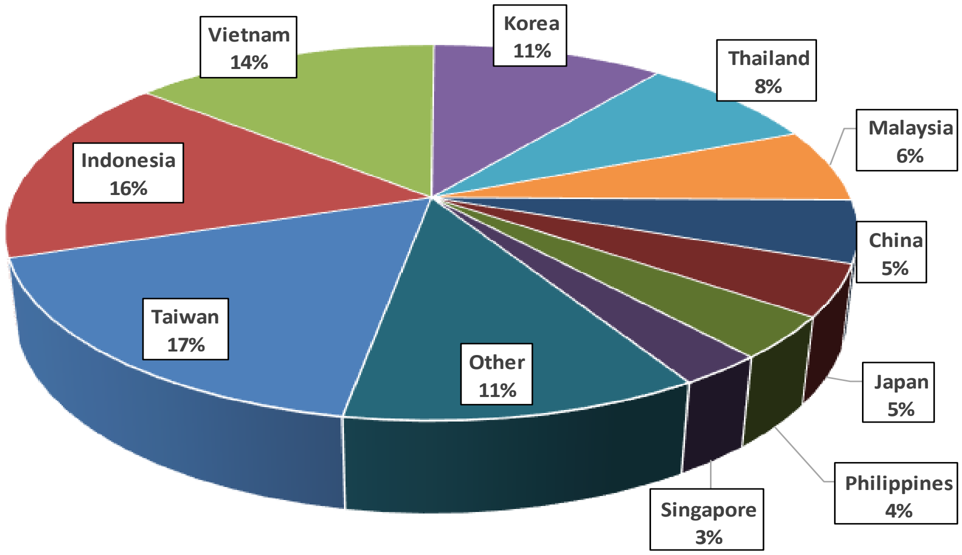
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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

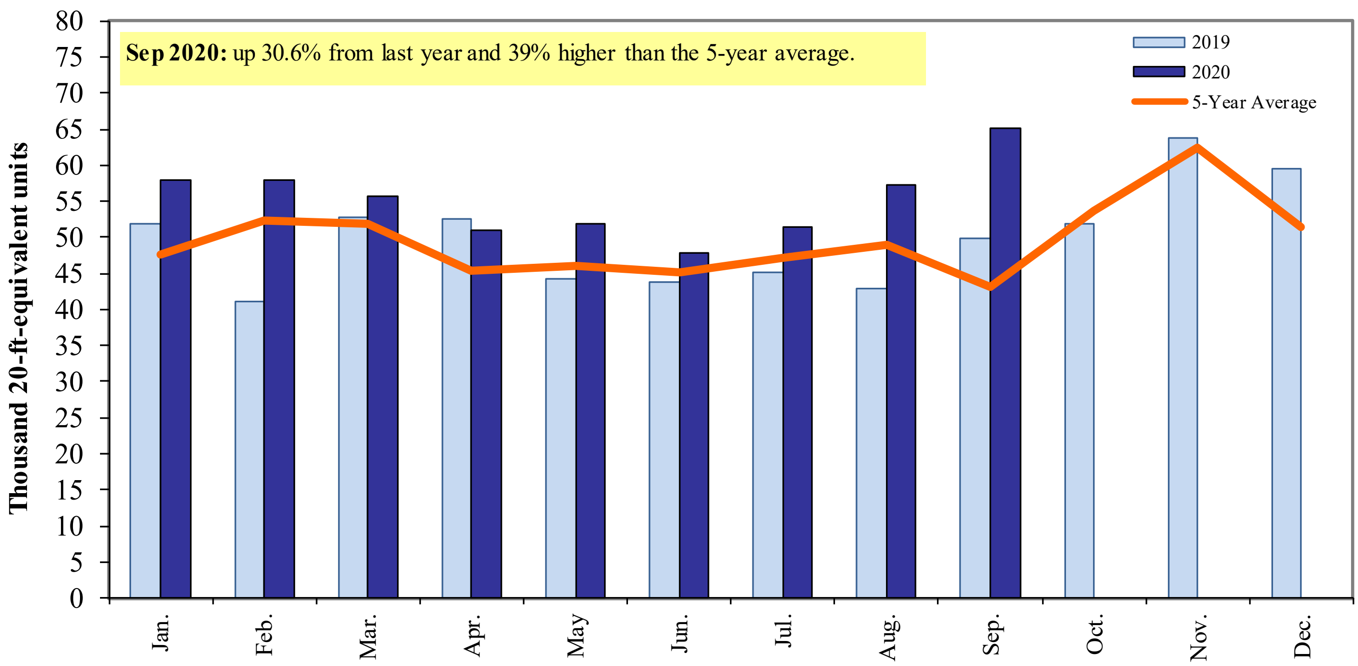


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

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.

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