USDA United States Department of Agriculture

# Grain Transportation Report

*A weekly publication of the Agricultural Marketing Service*
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**November 5, 2020**

## Contents



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**The next release is November 12, 2020**

## WEEKLY HIGHLIGHTS

### DOT Expands Loan Pilot Program For Modernizing Shortline and Regional Railroad Infrastructure

The U.S. Department of Transportation (DOT) issued a notice of funding opportunity to expand eligibility and access to the Railroad Rehabilitation and Improvement Financing Express (RRIF Express) pilot program. RRIF Express aims to reduce the time and costs required to secure long-term, low-cost loans for modernizing older short line and regional freight and commuter rail infrastructure. The program can provide loans of up to $150 million for qualified borrowers. The notice of funding opportunity increases loan amounts from $50 million to $150 million; makes more projects eligible for loans; raises the portion of a loan eligible for refinancing from 40 percent to 75 percent; and allows consideration of new categories of environmental review. Additionally, the notice raises Credit Risk Premium assistance from 5 percent to up to 10 percent of the loan value, capped at $5 million per application. Applications will be accepted until all available financing is exhausted.

### AGTC and TradeLanes Survey Shippers on Effects of "Earliest Return Date" Changes

According to shippers, shipping lines often poorly communicate changes to "earliest return dates" (ERDs), creating additional costs for shippers. In a recent survey by the Agriculture Transportation Coalition (AgTC) and supply chain technology firm TradeLanes, 92 percent of shipper-respondents wanted to pursue industry action on ERD issues. Over 75 percent of respondents said their carrier bookings did not always have a listed ERD, and 78 percent reported their shipments have incurred extra costs as a result of ERD changes. Most respondents reported more than 25 percent of their shipments had had an ERD change since the start of the COVID-19 pandemic. The complete survey findings are provided here.

### Grain Inspections Recede but Remain Above Average

For the week ending October 29, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 3.2 million metric tons (mmt). Total grain inspections were down 21 percent from the previous week, up 50 percent from last year, and up 19 percent from the 3-year average. The drop in inspections was driven by a 28-percent decrease in wheat inspections, destined primarily to Latin America, and a 26-percent decrease in soybean inspections, destined mainly to Asia. Corn inspections, however, increased 6 percent from week to week. Despite the week-to-week drop in grain inspections, inspections during the last 4 weeks were 56 percent above last year and 36 percent above the 3-year average. Grain inspections decreased 20 percent from the previous week in the Pacific Northwest (PNW) and decreased 28 percent in the Mississippi Gulf. Year to year, total year to date inspections are up 9 percent.

## Snapshots by Sector

### Export Sales

For the week ending October 22, **unshipped balances** of wheat, corn, and soybeans totaled 62.8 million metric tons (mmt). This surpassed last week's previous record high for outstanding sales. Net **corn export sales** were 2.244 mmt, up 23 percent from the past week. Net **soybean export sales** were 1.621 mmt, down 27 percent from the previous week. Net weekly **wheat export sales** were 0.743 mmt, up significantly from the previous week.

### Rail

U.S. Class I railroads originated 26,044 **grain carloads** during the week ending October 24. This was a 2-percent increase from the previous week, 23 percent more than last year, and 14 percent more than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were $488 above tariff for the week ending October 29. This was $50 more than last week and $275 more than this week last year. There were no non-shuttle bids/offers this week.

### Barge

For the week ending October 31, **barge grain movements** totaled 960,442 tons. This was 19 percent less than the previous week and 45 percent more than the same period last year.

For the week ending October 31, 594 grain barges **moved down river**—163 barges fewer than the previous week. There were 718 grain barges **unloaded in New Orleans**, 27 percent lower than the previous week.

### Ocean

For the week ending October 29, 36 **oceangoing grain vessels** were loaded in the Gulf—64 percent more than the same period last year. Within the next 10 days (starting October 30), 59 vessels were expected to be loaded—48 percent more than the same period last year.

As of October 29, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $42.50. This was unchanged from the previous week. The rate from the Pacific Northwest (PNW) to Japan was $23.50 per mt, 1 percent less than the previous week.

### Fuel

For the week ending November 2, the U.S. average **diesel fuel price** decreased 1.3 cents from the previous week to $2.372 per gallon, 69.0 cents below the same week last year.

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# Feature Article/Calendar

## Wheat Transportation Costs Increased From Second Quarter But Landed Costs Varied

From second quarter 2020 to third quarter 2020 (quarter to quarter), there was an increase in transportation costs for shipping wheat from Kansas and North Dakota to Japan through the Pacific Northwest (PNW routes) and U.S. Gulf (Gulf routes). However, for all of these routes, transportation costs decreased from third quarter 2019 to third quarter 2020 (year to year). Total landed costs (farm value plus transportation costs) for shipping via the PNW and Gulf routes varied by route from quarter to quarter, but were down year to year for all routes—mainly because of lower transportation costs (tables 1 and 2).

### Transportation Costs

Quarter to quarter, PNW-route transportation costs for shipping wheat rose by 5 percent with a Kansas origin and by 7 percent with a North Dakota origin. Year to year, PNW-route transportation costs decreased by 4 percent from Kansas and decreased by 2 percent from North Dakota. From quarter to quarter, Gulf-route transportation costs increased by 10 percent from Kansas and by 8 percent from North Dakota. From year to year, these costs decreased by 5 percent for Kansas and by 4 percent for North Dakota.

**Table 1: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the PNW**

| | Kansas | | | | | North Dakota | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Mode | 2019 3rd qtr | 2020 2nd qtr | 2020 3rd qtr | Year-to-year change | Quarterly change | 2019 3rd qtr | 2020 2nd qtr | 2020 3rd qtr | Year-to-year change | Quarterly change |
| | $/metric ton | | | % | % | $/metric ton | | | % | % |
| Truck | 9.18 | 9.70 | 12.38 | 34.86 | 27.63 | 9.18 | 9.70 | 12.38 | 34.86 | 27.63 |
| Rail[1] | 62.93 | 62.83 | 60.76 | -3.45 | -3.29 | 57.39 | 57.61 | 56.78 | -1.06 | -1.44 |
| Ocean vessel | 27.90 | 18.94 | 23.05 | -17.38 | 21.70 | 27.90 | 18.94 | 23.05 | -17.38 | 21.70 |
| Transportation costs | 100.01 | 91.47 | 96.19 | -3.82 | 5.16 | 94.47 | 86.25 | 92.21 | -2.39 | 6.91 |
| Farm value[2] | 147.83 | 162.65 | 158.37 | 7.13 | -2.63 | 162.53 | 169.02 | 161.06 | -0.90 | -4.71 |
| Total landed cost | 247.84 | 254.12 | 254.56 | 2.71 | 0.17 | 257.00 | 255.27 | 253.27 | -1.45 | -0.78 |
| Transport % of landed cost | 40.35 | 35.99 | 37.79 | | | 36.76 | 33.79 | 36.41 | | |

**Table 2: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the U.S. Gulf**

| | Kansas | | | | | North Dakota | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Mode | 2019 3rd qtr | 2020 2nd qtr | 2020 3rd qtr | Year-to-year change | Quarterly change | 2019 3rd qtr | 2020 2nd qtr | 2020 3rd qtr | Year-to-year change | Quarterly change |
| | $/metric ton | | | % | % | $/metric ton | | | % | % |
| Truck | 9.18 | 9.70 | 12.38 | 34.86 | 27.63 | 9.18 | 9.70 | 12.38 | 34.86 | 27.63 |
| Rail[1] | 43.31 | 43.31 | 42.48 | -1.92 | -1.92 | 60.57 | 60.78 | 59.95 | -1.02 | -1.37 |
| Ocean vessel | 50.05 | 36.33 | 42.99 | -14.11 | 18.33 | 50.05 | 36.33 | 42.99 | -14.11 | 18.33 |
| Transportation costs | 102.54 | 89.34 | 97.85 | -4.57 | 9.53 | 119.80 | 106.81 | 115.32 | -3.74 | 7.97 |
| Farm value[2] | 147.83 | 162.65 | 158.37 | 7.13 | -2.63 | 162.53 | 169.02 | 161.06 | -0.90 | -4.71 |
| Total landed cost | 250.37 | 251.99 | 256.22 | 2.34 | 1.68 | 282.33 | 275.83 | 276.38 | -2.11 | 0.20 |
| Transport % of landed cost | 40.96 | 35.45 | 38.19 | | | 42.43 | 38.72 | 41.73 | | |

[1] Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars 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.

[2] USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter).
Note: PNW = Pacific Northwest; qtr = quarter
Source: USDA, Agricultural Marketing Service.

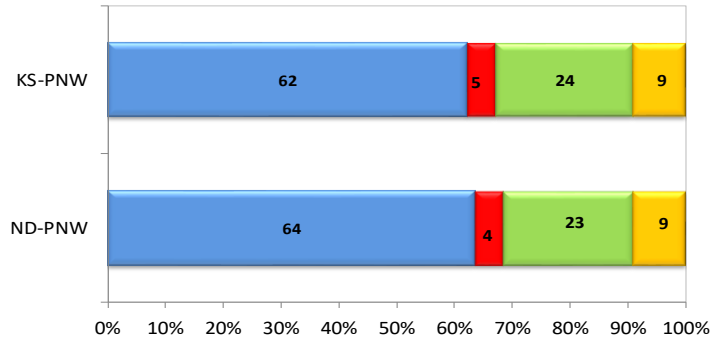
### PNW Landed Costs

In third quarter 2020, the total landed costs for shipping wheat through the PNW routes ranged from $253 per metric ton (mt) to $255 (table 1). Quarter to quarter, landed costs through the PNW routes were unchanged with a Kansas origin but decreased by 1 percent with a North Dakota origin. Year to year, PNW-route landed costs increased 3 percent from Kansas, mainly because of higher farm values, but decreased 2 percent from North Dakota, because of lower transportation costs and farm values.

Rail's share of total PNW-route landed costs from Kansas were slightly below the same time last year, but from North Dakota, were slightly above last year. Third-quarter 2020 farm values were 62 percent of PNW-route landed costs from Kansas and 64 percent of landed costs from North Dakota. For both States, these values were above last year (fig. 1 and table 1).

Quarter to quarter, PNW-route ocean rates increased by 22 percent because of greater demand from Asia. However, year to year, ocean rates decreased by 17 percent in response to market uncertainties (*Grain Transportation Report (GTR),* October 15, 2020). PNW-route rail rates fell by 3 percent from Kansas and by 1 percent from North Dakota, both year to year and quarter to quarter. For both State origins, PNW trucking rates jumped 28 percent from quarter to quarter and 35 percent from year to year. The increases were due partly to higher demand for wheat. PNW-route transportation costs represented 36-38 percent of the total landed costs, above last quarter but below the same time last year (see table 1).

**Figure 1. Landed costs for shipping wheat (Pacific Northwest) to Japan, third quarter 2020**



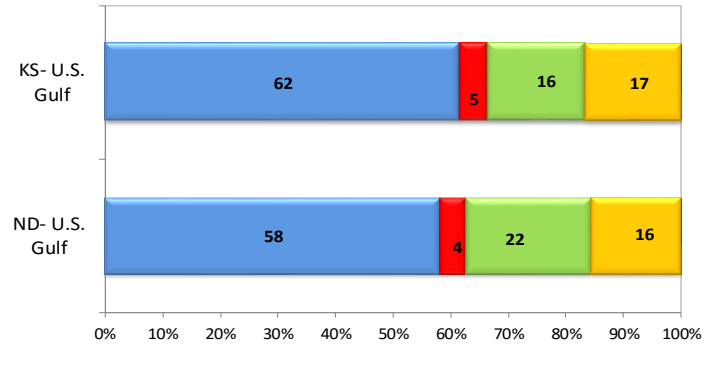

Note: PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.

Source: USDA, Agricultural Marketing Service.

## U.S. Gulf Landed Costs

Total landed costs to ship wheat through the Gulf routes ranged from $256/mt to $276/mt. Quarter to quarter, total landed costs through the Gulf routes rose 2 percent with a Kansas origin and were unchanged from North Dakota. Year to year, Gulf-route landed costs increased by 2 percent from Kansas but decreased by 2 percent from North Dakota (see table 2). Third-quarter 2020 farm values represented 62 percent of Gulf-route landed costs from Kansas and 58 percent from North Dakota, which were below the same time last year for both States (fig. 2 and table 2).

**Figure 2. Landed costs for shipping wheat (U.S. Gulf) to Japan, third quarter 2020**




Note: KS = Kansas; ND = North Dakota.

Source: USDA, Agricultural Marketing Service.

For both State origins, Gulf-route ocean rates for shipping wheat rose by 18 percent from quarter to quarter, but fell by 14 percent from year to year. Also, for both States, Gulf-route rail rates were down slightly from quarter to quarter and from year to year. Year to year, rail's share of Gulf-route landed costs was slightly down from Kansas, but unchanged from North Dakota. In third quarter 2020, Gulf-route transportation costs were 38 percent of landed costs from Kansas and 42 percent of landed costs from North Dakota. For both States, these values were up quarter to quarter and down year to year. (see table 2).

## PNW vs. U.S. Gulf Cost Comparison

Quarter to quarter, transportation costs for shipping wheat through all PNW and Gulf routes increased in third quarter 2020. However, third-quarter 2020 total landed costs varied. Landed costs for shipments of wheat originating in Kansas were either unchanged or up slightly from quarter to quarter and were up slightly (both routes) from year to year. Landed costs for shipments originating in North Dakota were either down slightly or unchanged from quarter to quarter and were down slightly (both routes) from year to year. Year to year, transportation costs for both States were down mainly because of lower ocean rates (see tables 1 and 2).

According to USDA's Federal Grain Inspection Service, third-quarter 2020 wheat inspected for export to Japan totaled .675 million metric tons, up by 17 percent from the same time last year and down by 1 percent from last quarter. Japan accounted for 8 percent of total U.S. third-quarter 2020 wheat exports (8.1 mmt). In third quarter 2020, total U.S. wheat exports rose by 15 percent with rising demand from Asia (*GTR,* October 8, 2020). U.S. wheat exports for marketing year 2020/21 are expected to increase 1 percent, according to the USDA's *World Agricultural Supply and Demand Estimates* October 2020 report.

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# Grain Transportation Indicators

Table 1

**Grain transport cost indicators**[1]

| | Truck | Rail | | Barge | Ocean | |
|---|---|---|---|---|---|---|
| For the week ending | | Unit train | Shuttle | | Gulf | Pacific |
| 11/04/20 | 159 | 288 | 241 | 331 | 190 | 167 |
| 10/28/20 | 160 | 288 | 239 | 287 | 190 | 168 |

[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)**

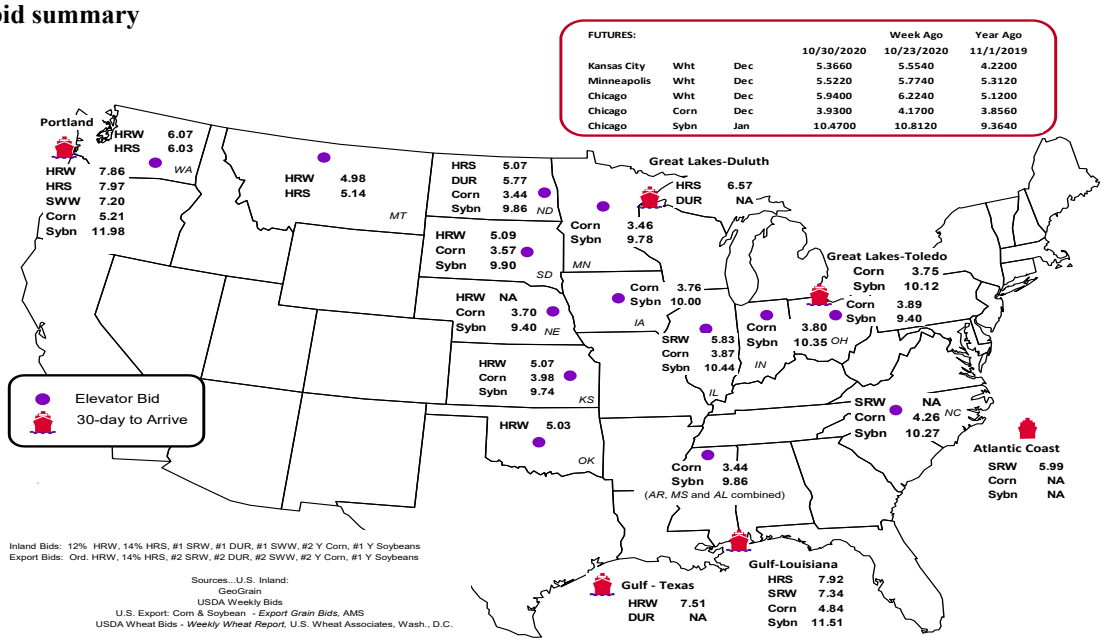
| Commodity | Origin–destination | 10/30/2020 | 10/23/2020 |
|---|---|---|---|
| Corn | IL–Gulf | -0.97 | -0.95 |
| Corn | NE–Gulf | -1.14 | -1.08 |
| Soybean | IA–Gulf | -1.51 | -1.50 |
| HRW | KS–Gulf | -2.44 | -2.44 |
| HRS | ND–Portland | -2.90 | -2.93 |

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] |
|---|---|---|---|---|---|---|---|
| 10/28/2020[p] | 2,026 | 2,206 | 7,900 | 821 | 12,953 | 10/24/2020 | 2,236 |
| 10/21/2020[r] | 1,790 | 2,258 | 9,479 | 678 | 14,205 | 10/17/2020 | 1,697 |
| 2020 YTD[r] | 29,025 | 46,289 | 227,247 | 11,410 | 313,971 | 2020 YTD | 104,384 |
| 2019 YTD[r] | 37,291 | 47,172 | 212,102 | 15,149 | 311,714 | 2019 YTD | 105,153 |
| 2020 YTD as % of 2019 YTD | 78 | 98 | 107 | 75 | 101 | % change YTD | 99 |
| Last 4 weeks as % of 2019[2] | 408 | 256 | 196 | 222 | 221 | Last 4wks. % 2019 | 82 |
| Last 4 weeks as % of 4-year avg.[2] | 145 | 221 | 139 | 94 | 144 | Last 4wks. % 4 yr. | 86 |
| Total 2019 | 40,974 | 51,167 | 251,181 | 16,192 | 359,514 | Total 2019 | 127,622 |
| Total 2018 | 22,118 | 46,532 | 310,449 | 21,432 | 400,531 | Total 2018 | 129,674 |

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

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

[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads. to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

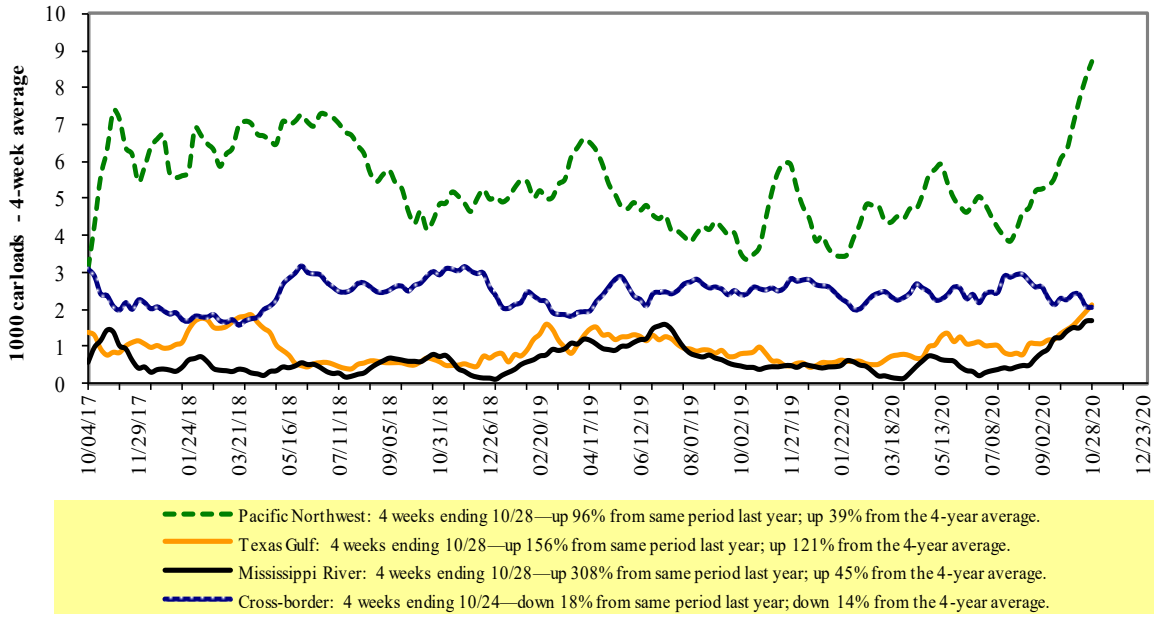
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.**

Source: USDA, Agricultural Marketing Service.

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

Figure 2

**Rail deliveries to port**




Source: USDA, Agricultural Marketing Service.

Table 4

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

| For the week ending: | East | | West | | | U.S. total | Canada | |
|---|---|---|---|---|---|---|---|---|
| 10/24/2020 | CSXT | NS | BNSF | KCS | UP | | CN | CP |
| This week | 1,739 | 3,100 | 12,902 | 1,108 | 7,195 | 26,044 | 6,473 | 6,016 |
| This week last year | 2,000 | 2,042 | 11,263 | 765 | 5,073 | 21,143 | 4,281 | 4,759 |
| 2020 YTD | 71,440 | 102,942 | 478,166 | 46,423 | 229,134 | 928,105 | 183,954 | 202,228 |
| 2019 YTD | 77,848 | 115,018 | 466,726 | 48,422 | 218,010 | 926,024 | 174,486 | 191,062 |
| 2020 YTD as % of 2019 YTD | 92 | 90 | 102 | 96 | 105 | 100 | 105 | 106 |
| Last 4 weeks as % of 2019* | 113 | 132 | 128 | 119 | 135 | 128 | 128 | 117 |
| Last 4 weeks as % of 3-yr. avg.** | 98 | 110 | 118 | 120 | 131 | 119 | 128 | 108 |
| Total 2019 | 91,611 | 136,949 | 568,369 | 58,527 | 260,269 | 1,115,725 | 212,483 | 235,892 |

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

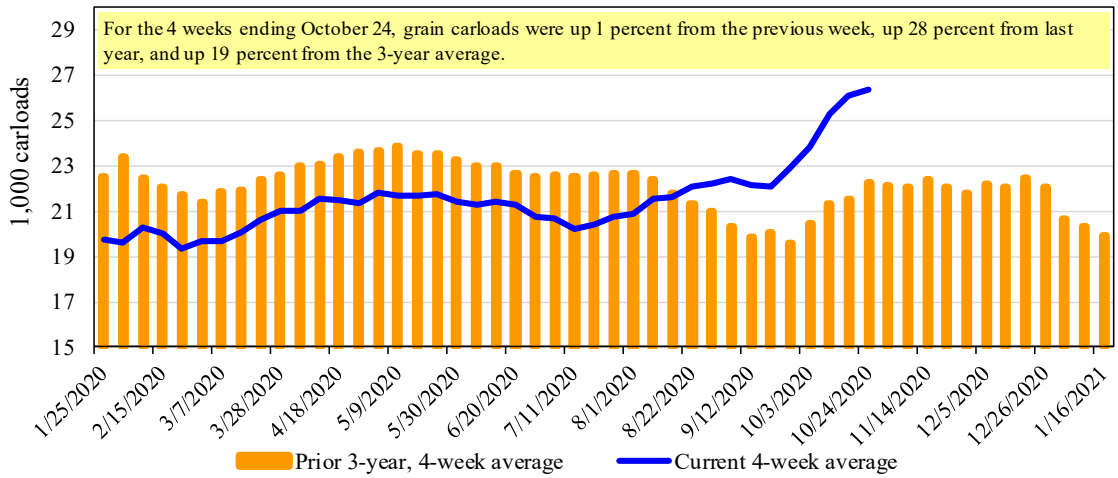
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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

Source: Association of American Railroads.

Figure 3

**Total weekly U.S. Class I railroad grain carloads**




Source: Association of American Railroads.

Table 5

**Railcar auction offerings[1] ($/car)[2]**

| For the week ending: | | Delivery period | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 10/29/2020 | | Nov-20 | Nov-19 | Dec-20 | Dec-19 | Jan-21 | Jan-20 | Feb-21 | Feb-20 |
| BNSF[3] | COT grain units | no bids | 1 | no bids | 0 | no bid | 0 | no bid | 0 |
| | COT grain single-car | 0 | 0 | 6 | 0 | 3 | 0 | 5 | 0 |
| UP[4] | GCAS/Region 1 | no offer | no offer | no offer | no bid | no offer | no offer | n/a | n/a |
| | GCAS/Region 2 | no offer | no bid | no offer | no bid | no offer | no offer | n/a | n/a |

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

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

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

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

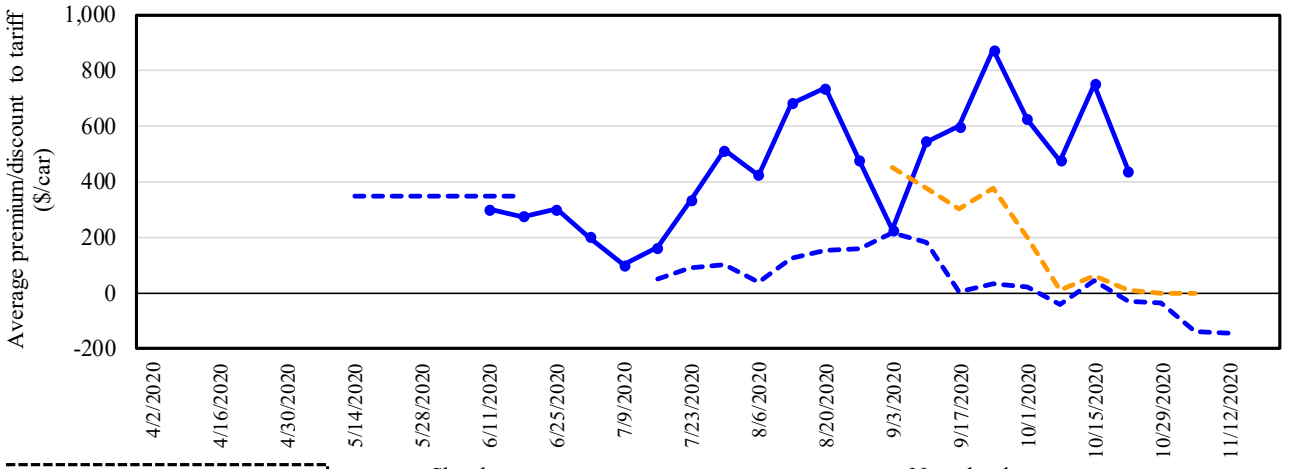
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

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

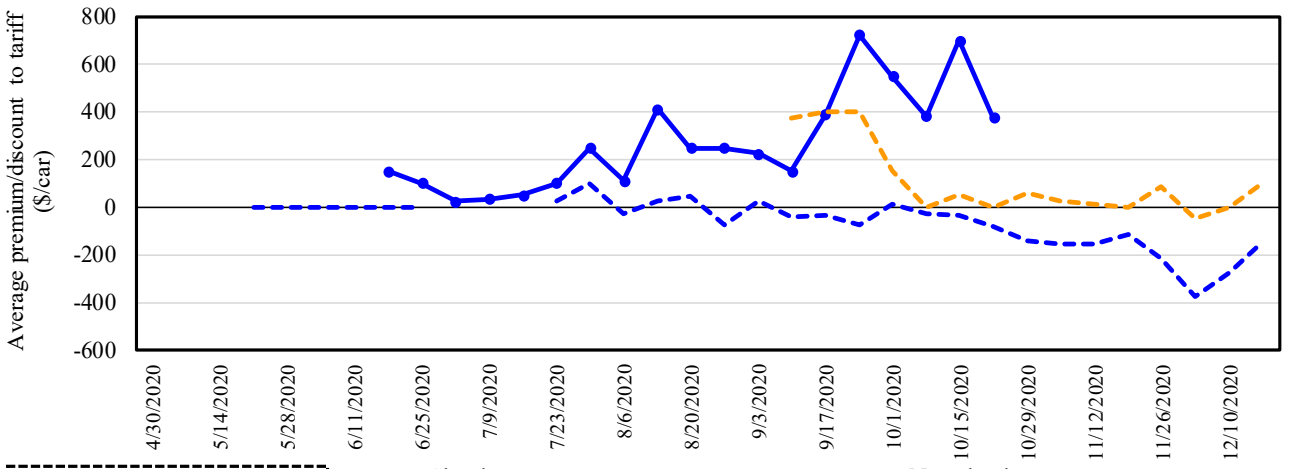



| 10/29/2020 | BNSF | UP |
|---|---|---|
| Non-shuttle | n/a | n/a |
| Shuttle | $675 | $300 |

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $50 this week and are $388 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**



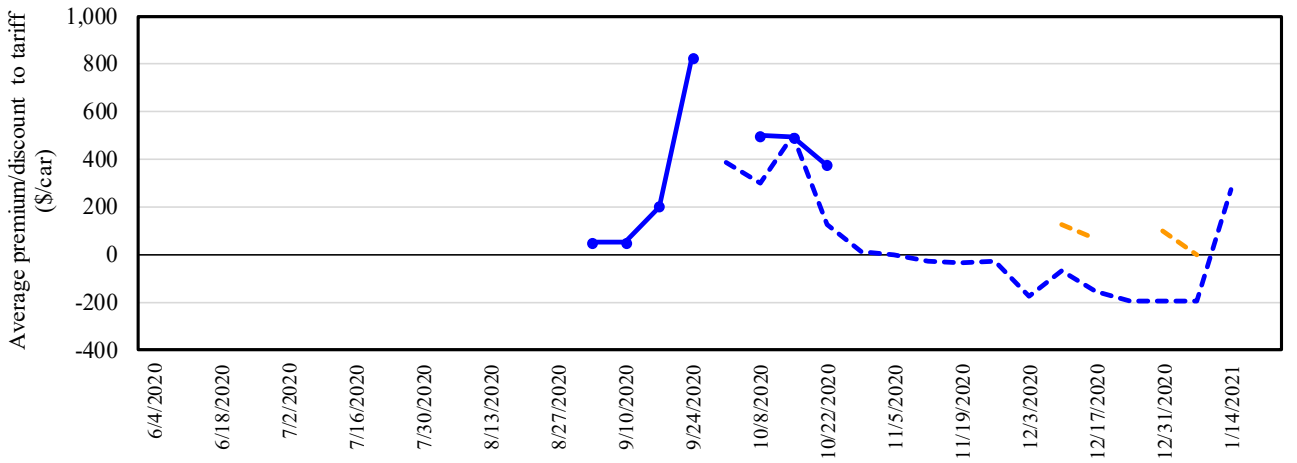

| 10/29/2020 | BNSF | UP |
|---|---|---|
| Non-shuttle | n/a | n/a |
| Shuttle | $700 | $350 |

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $150 this week and are $200 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**




| 10/29/2020 | BNSF | UP |
|---|---|---|
| Non-shuttle | n/a | n/a |
| Shuttle | n/a | $375 |

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers are unchanged this week and are $450 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: 10/29/2020 | 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** | **675** | **700** | **n/a** | **n/a** | **n/a** | **n/a** |
| | Change from last week | 125 | 300 | n/a | n/a | n/a | n/a |
| | Change from same week 2019 | 463 | n/a | n/a | n/a | n/a | n/a |
| | **UP-Pool** | **300** | **350** | **375** | **n/a** | **75** | **n/a** |
| | Change from last week | (25) | 0 | 0 | n/a | (100) | n/a |
| | Change from same week 2019 | n/a | 450 | n/a | n/a | n/a | n/a |

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

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

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

Source: USDA, Agricultural Marketing Service.

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

Table 7

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

| November 2020 | Origin region[3] | Destination region[3] | Tariff rate/car | Fuel surcharge per car | Tariff plus surcharge per: metric ton | Tariff plus surcharge per: bushel[2] | Percent change Y/Y[4] |
|---|---|---|---|---|---|---|---|
| **Unit train** | | | | | | | |
| Wheat | Wichita, KS | St. Louis, MO | $3,983 | $35 | $39.90 | $1.09 | -1 |
| | Grand Forks, ND | Duluth-Superior, MN | $4,208 | $0 | $41.79 | $1.14 | -3 |
| | Wichita, KS | Los Angeles, CA | $7,115 | $0 | $70.66 | $1.92 | -2 |
| | Wichita, KS | New Orleans, LA | $4,525 | $62 | $45.55 | $1.24 | -2 |
| | Sioux Falls, SD | Galveston-Houston, TX | $6,851 | $0 | $68.03 | $1.85 | -2 |
| | Colby, KS | Galveston-Houston, TX | $4,801 | $68 | $48.35 | $1.32 | -2 |
| | Amarillo, TX | Los Angeles, CA | $5,121 | $95 | $51.80 | $1.41 | -3 |
| Corn | Champaign-Urbana, IL | New Orleans, LA | $3,900 | $70 | $39.43 | $1.00 | -3 |
| | Toledo, OH | Raleigh, NC | $7,833 | $0 | $77.79 | $1.98 | 15 |
| | Des Moines, IA | Davenport, IA | $2,455 | $15 | $24.53 | $0.62 | 1 |
| | Indianapolis, IN | Atlanta, GA | $5,979 | $0 | $59.37 | $1.51 | 3 |
| | Indianapolis, IN | Knoxville, TN | $5,040 | $0 | $50.05 | $1.27 | 3 |
| | Des Moines, IA | Little Rock, AR | $3,900 | $44 | $39.16 | $0.99 | 1 |
| | Des Moines, IA | Los Angeles, CA | $5,780 | $128 | $58.67 | $1.49 | -2 |
| Soybeans | Minneapolis, MN | New Orleans, LA | $3,631 | $30 | $36.35 | $0.99 | -4 |
| | Toledo, OH | Huntsville, AL | $6,595 | $0 | $65.49 | $1.78 | 17 |
| | Indianapolis, IN | Raleigh, NC | $7,125 | $0 | $70.75 | $1.93 | 3 |
| | Indianapolis, IN | Huntsville, AL | $5,247 | $0 | $52.11 | $1.42 | 3 |
| | Champaign-Urbana, IL | New Orleans, LA | $4,645 | $70 | $46.83 | $1.27 | -2 |
| **Shuttle train** | | | | | | | |
| Wheat | Great Falls, MT | Portland, OR | $4,018 | $0 | $39.90 | $1.09 | -3 |
| | Wichita, KS | Galveston-Houston, TX | $4,236 | $0 | $42.07 | $1.14 | -3 |
| | Chicago, IL | Albany, NY | $6,376 | $0 | $63.32 | $1.72 | -10 |
| | Grand Forks, ND | Portland, OR | $5,676 | $0 | $56.37 | $1.53 | -2 |
| | Grand Forks, ND | Galveston-Houston, TX | $5,996 | $0 | $59.54 | $1.62 | -2 |
| | Colby, KS | Portland, OR | $6,012 | $112 | $60.81 | $1.66 | -3 |
| Corn | Minneapolis, MN | Portland, OR | $5,180 | $0 | $51.44 | $1.31 | 0 |
| | Sioux Falls, SD | Tacoma, WA | $5,140 | $0 | $51.04 | $1.30 | 0 |
| | Champaign-Urbana, IL | New Orleans, LA | $3,820 | $70 | $38.63 | $0.98 | -3 |
| | Lincoln, NE | Galveston-Houston, TX | $3,880 | $0 | $38.53 | $0.98 | 0 |
| | Des Moines, IA | Amarillo, TX | $4,320 | $55 | $43.45 | $1.10 | 0 |
| | Minneapolis, MN | Tacoma, WA | $5,180 | $0 | $51.44 | $1.31 | 0 |
| | Council Bluffs, IA | Stockton, CA | $5,100 | $0 | $50.65 | $1.29 | 2 |
| Soybeans | Sioux Falls, SD | Tacoma, WA | $5,850 | $0 | $58.09 | $1.58 | 0 |
| | Minneapolis, MN | Portland, OR | $5,900 | $0 | $58.59 | $1.59 | 0 |
| | Fargo, ND | Tacoma, WA | $5,750 | $0 | $57.10 | $1.55 | 0 |
| | Council Bluffs, IA | New Orleans, LA | $4,875 | $81 | $49.22 | $1.34 | -3 |
| | Toledo, OH | Huntsville, AL | $4,945 | $0 | $49.11 | $1.34 | 3 |
| | Grand Island, NE | Portland, OR | $5,260 | $115 | $53.37 | $1.45 | -13 |

[1]A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

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

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

[4]Percentage change year over year (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8

**Tariff rail rates for U.S. bulk grain shipments to Mexico**

| Date: November 2020 | | | | | | | |
|---|---|---|---|---|---|---|---|
| Commodity | Origin state | Destination region | Tariff rate per car[1] | Fuel surcharge per car[2] | Tariff rate plus fuel surcharge per: metric ton[3] | bushel[3] | Percent change[4] Y/Y |
| Wheat | MT | Chihuahua, CI | $7,384 | $0 | $75.45 | $2.05 | -2 |
| | OK | Cuautitlan, EM | $6,713 | $49 | $69.08 | $1.88 | -2 |
| | KS | Guadalajara, JA | $7,471 | $363 | $80.05 | $2.18 | -4 |
| | TX | Salinas Victoria, NL | $4,347 | $28 | $44.71 | $1.22 | -1 |
| Corn | IA | Guadalajara, JA | $8,902 | $295 | $93.97 | $2.38 | -2 |
| | SD | Celaya, GJ | $8,140 | $0 | $83.17 | $2.11 | 0 |
| | NE | Queretaro, QA | $8,300 | $92 | $85.75 | $2.18 | -2 |
| | SD | Salinas Victoria, NL | $6,905 | $0 | $70.55 | $1.79 | 0 |
| | MO | Tlalnepantla, EM | $7,665 | $89 | $79.23 | $2.01 | -2 |
| | SD | Torreon, CU | $7,690 | $0 | $78.57 | $1.99 | 0 |
| Soybeans | MO | Bojay (Tula), HG | $8,547 | $278 | $90.16 | $2.45 | -2 |
| | NE | Guadalajara, JA | $9,157 | $286 | $96.48 | $2.62 | -2 |
| | IA | El Castillo, JA | $9,410 | $0 | $96.15 | $2.61 | -1 |
| | KS | Torreon, CU | $8,014 | $191 | $83.83 | $2.28 | -1 |
| Sorghum | NE | Celaya, GJ | $7,772 | $255 | $82.02 | $2.08 | -2 |
| | KS | Queretaro, QA | $8,108 | $61 | $83.46 | $2.12 | -1 |
| | NE | Salinas Victoria, NL | $6,713 | $49 | $69.09 | $1.75 | -1 |
| | NE | Torreon, CU | $7,092 | $169 | $74.19 | $1.88 | -3 |

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

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

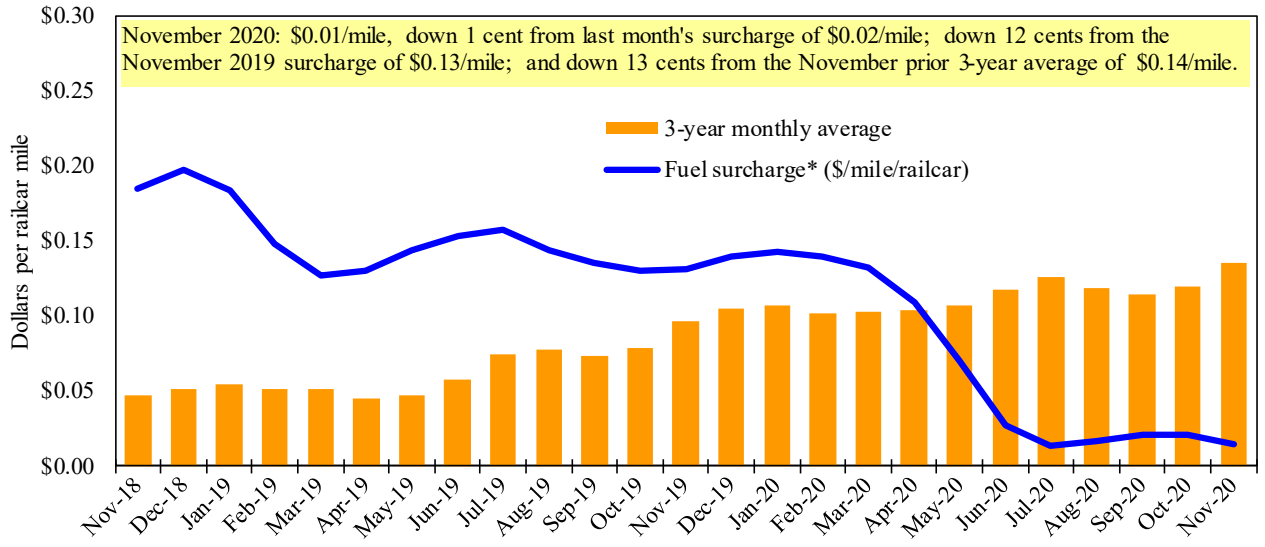
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

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

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

Figure 7

**Railroad fuel surcharges, North American weighted average[1]**




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

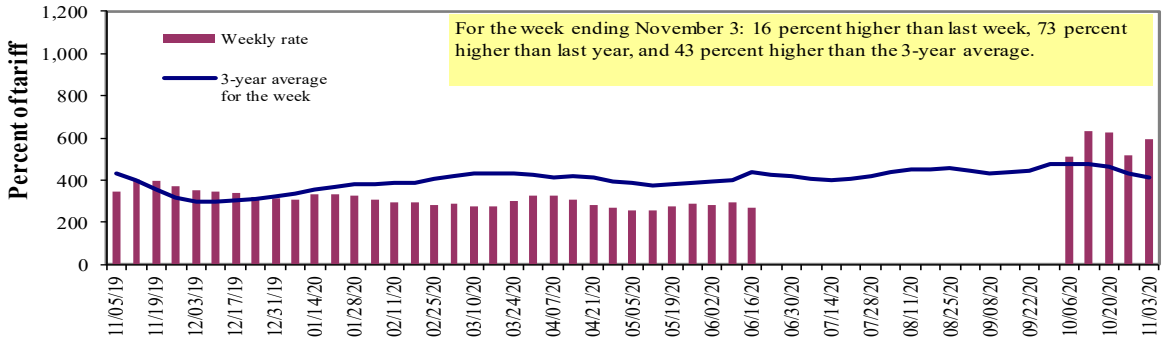
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

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

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

# Barge Transportation

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




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

Table 9
**Weekly barge freight rates: Southbound only**

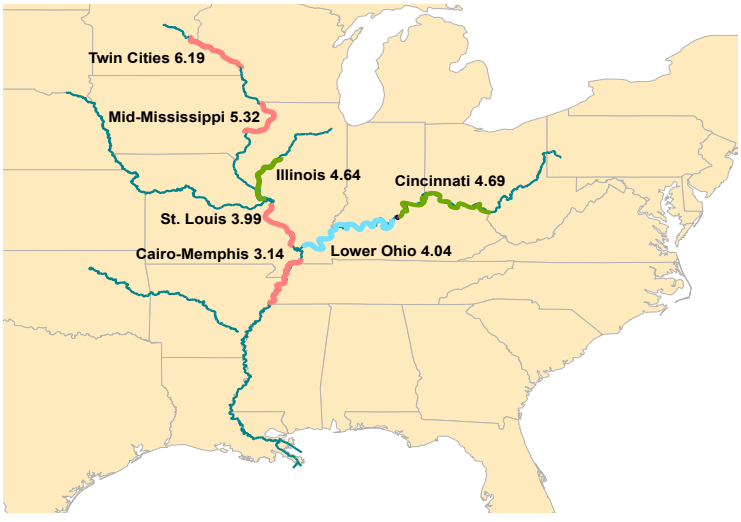
| | | Twin Cities | Mid-Mississippi | Lower Illinois River | St. Louis | Cincinnati | Lower Ohio | Cairo-Memphis |
|---|---|---|---|---|---|---|---|---|
| **Rate[1]** | 11/3/2020 | 673 | 617 | 596 | 479 | 575 | 575 | 492 |
| | 10/27/2020 | 671 | 566 | 516 | 443 | 444 | 444 | 443 |
| **$/ton** | 11/3/2020 | 41.66 | 32.82 | 27.65 | 19.11 | 26.97 | 23.23 | 15.45 |
| | 10/27/2020 | 41.53 | 30.11 | 23.94 | 17.68 | 20.82 | 17.94 | 13.91 |
| **Current week % change from the same week:** | | | | | | | | |
| | Last year | 62 | 77 | 73 | 95 | 127 | 127 | 119 |
| | 3-year avg. [2] | 55 | 49 | 43 | 45 | 47 | 47 | 65 |
| **Rate[1]** | December | - | - | 485 | 388 | 392 | 392 | 364 |
| | February | - | - | 473 | 340 | 340 | 340 | 317 |

[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

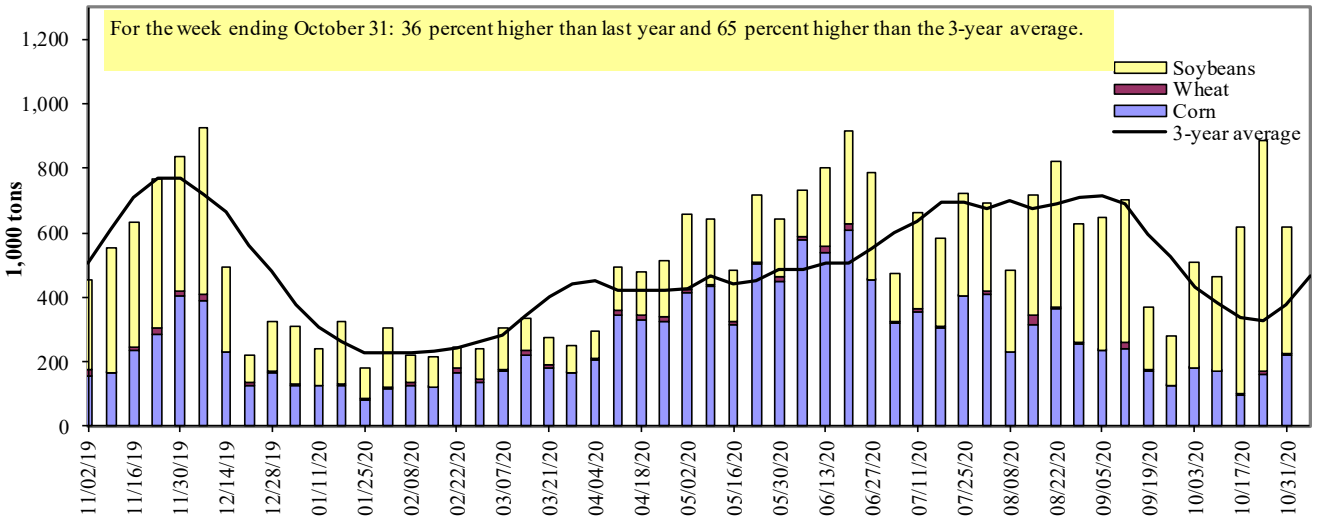
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.




*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 10/31/2020 | Corn | Wheat | Soybeans | Other | Total |
|---|---|---|---|---|---|
| **Mississippi River** | | | | | |
| Rock Island, IL (L15) | 50 | 2 | 306 | 0 | 358 |
| Winfield, MO (L25) | 159 | 3 | 404 | 0 | 566 |
| Alton, IL (L26) | 217 | 3 | 418 | 0 | 639 |
| Granite City, IL (L27) | 222 | 3 | 391 | 0 | 617 |
| **Illinois River (La Grange)** | 63 | 0 | 35 | 0 | 98 |
| **Ohio River (Olmsted)** | 110 | 0 | 164 | 0 | 274 |
| **Arkansas River (L1)** | 0 | 8 | 60 | 1 | 70 |
| | | | | | |
| Weekly total - 2020 | 332 | 12 | 616 | 1 | 960 |
| Weekly total - 2019 | 220 | 21 | 421 | 0 | 662 |
| 2020 YTD[1] | 15,214 | 1,633 | 14,053 | 172 | 31,072 |
| 2019 YTD[1] | 10,352 | 1,432 | 10,829 | 136 | 22,750 |
| 2020 as % of 2019 YTD | 147 | 114 | 130 | 127 | 137 |
| Last 4 weeks as % of 2019[2] | 151 | 79 | 215 | 3,191 | 186 |
| Total 2019 | 12,780 | 1,631 | 14,683 | 154 | 29,247 |

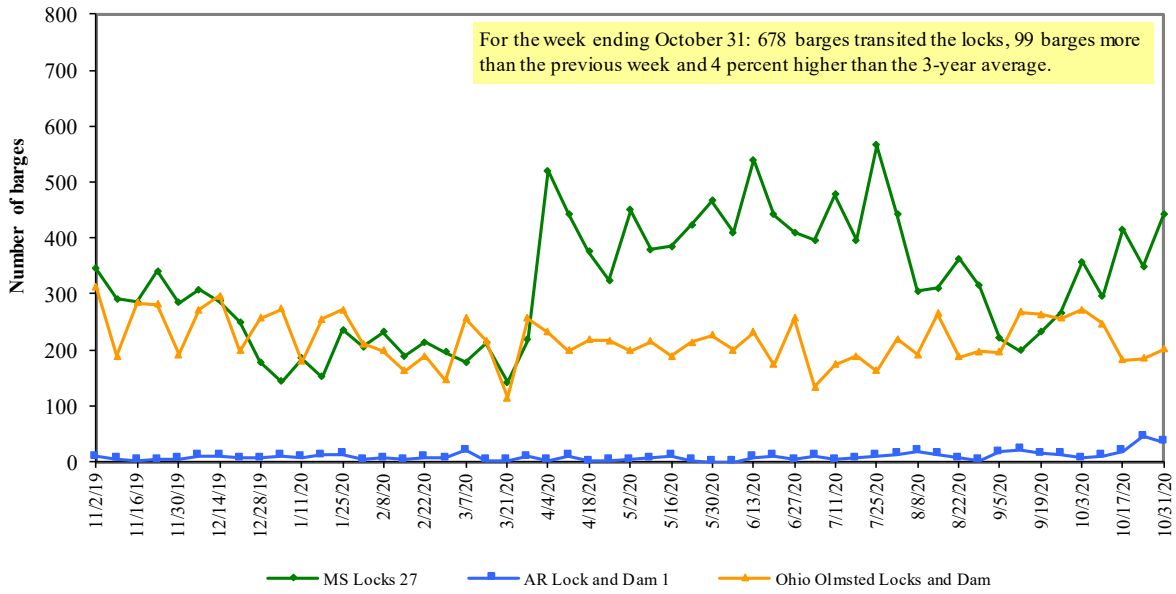
[1] Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

[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

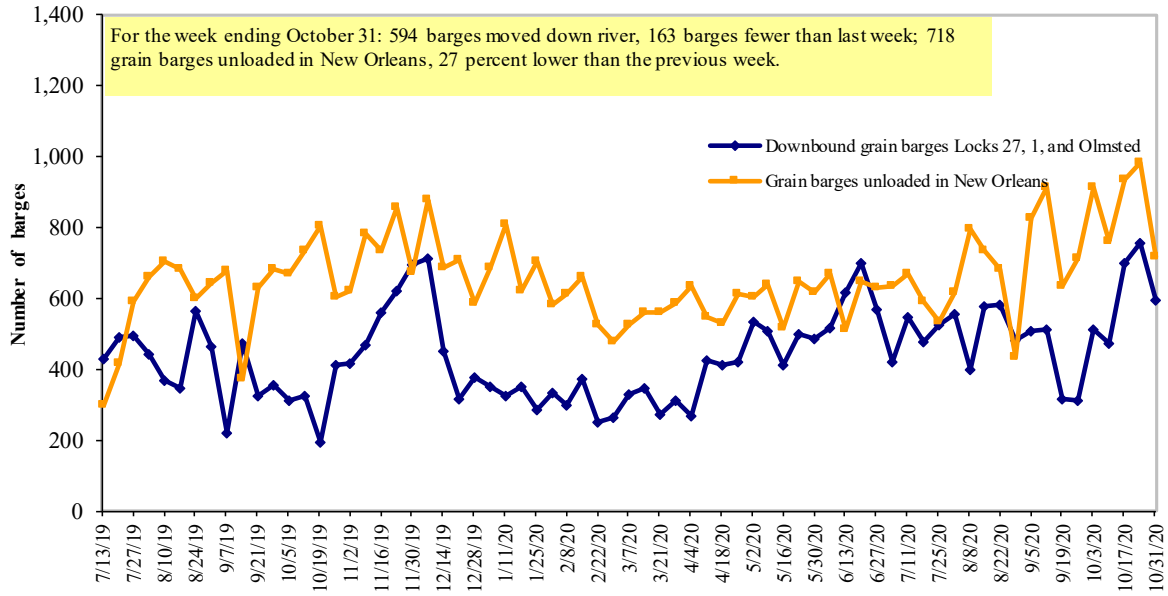
**Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**




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 11/2/2020 (U.S. $/gallon)**

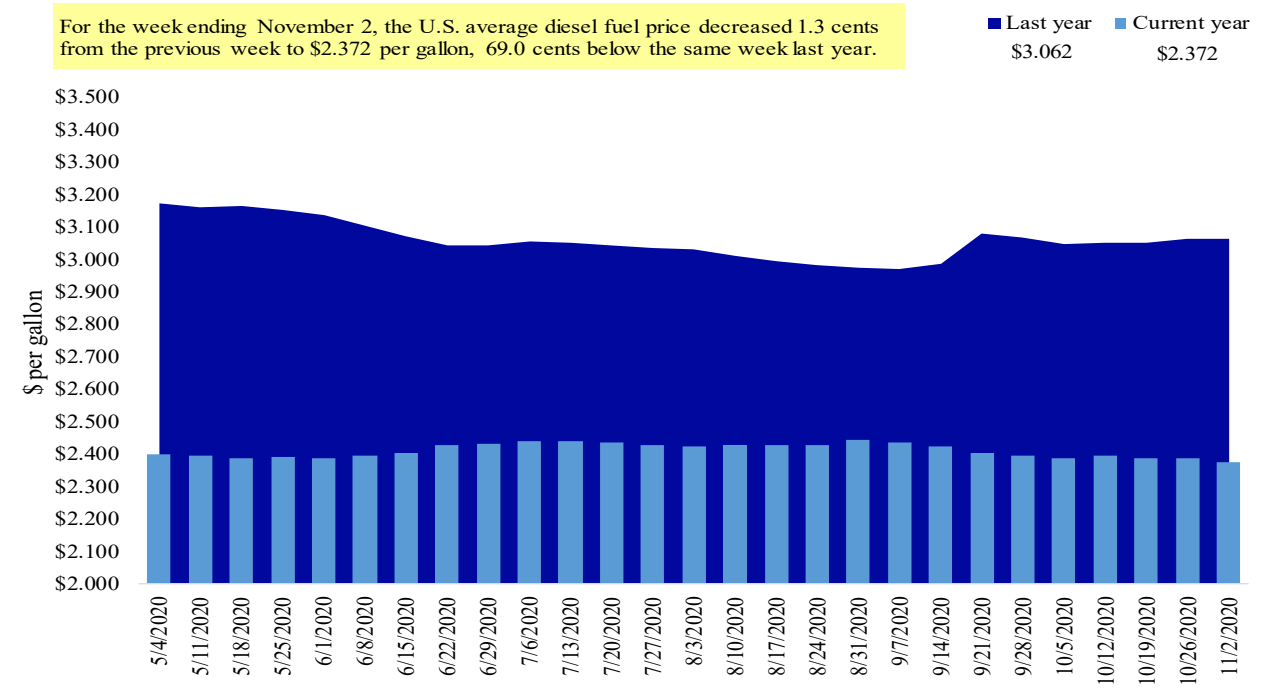
| Region | Location | Price | Change from Week ago | Change from Year ago |
|---|---|---|---|---|
| I | East Coast | 2.444 | -0.017 | -0.597 |
| | New England | 2.556 | -0.018 | -0.478 |
| | Central Atlantic | 2.646 | -0.002 | -0.598 |
| | Lower Atlantic | 2.284 | -0.027 | -0.621 |
| II | Midwest | 2.246 | -0.016 | -0.709 |
| III | Gulf Coast | 2.131 | -0.015 | -0.664 |
| IV | Rocky Mountain | 2.324 | 0.000 | -0.842 |
| V | West Coast | 2.920 | 0.000 | -0.826 |
| | West Coast less California | 2.541 | 0.004 | -0.872 |
| | California | 3.231 | -0.004 | -0.780 |
| Total | United States | 2.372 | -0.013 | -0.690 |

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

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

Figure 13

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




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

# Grain Exports

Table 12

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

| | Wheat | | | | | | Corn | Soybeans | Total |
|---|---|---|---|---|---|---|---|---|---|
| For the week ending | HRW | SRW | HRS | SWW | DUR | All wheat | | | |
| **Export balances**[1] | | | | | | | | | |
| 10/22/2020 | 1,553 | 385 | 1,566 | 1,823 | 201 | 5,528 | 24,453 | 32,851 | 62,832 |
| This week year ago | 1,191 | 573 | 1,234 | 943 | 279 | 4,221 | 7,784 | 11,317 | 23,321 |
| **Cumulative exports-marketing year**[2] | | | | | | | | | |
| 2020/21 YTD | 4,365 | 915 | 2,996 | 2,017 | 339 | 10,632 | 6,125 | 14,119 | 30,877 |
| 2019/20 YTD | 4,196 | 1,249 | 2,759 | 1,837 | 318 | 10,357 | 3,621 | 7,831 | 21,810 |
| YTD 2020/21 as % of 2019/20 | 104 | 73 | 109 | 110 | 106 | 103 | 169 | 180 | 142 |
| Last 4 wks. as % of same period 2019/20* | 131 | 62 | 127 | 160 | 77 | 123 | 294 | 298 | 265 |
| Total 2019/20 | 9,526 | 2,318 | 6,960 | 4,751 | 922 | 24,477 | 42,622 | 43,994 | 111,094 |
| Total 2018/19 | 8,591 | 3,204 | 6,776 | 5,164 | 479 | 24,214 | 48,924 | 46,189 | 119,327 |

[1] Current unshipped (outstanding) export sales to date.

[2] Shipped export sales to date; new marketing year now in effect for wheat, corn, and soybeans.

Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW = soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 13

**Top 5 importers[1] of U.S. corn**

| For the week ending 10/22/2020 | Total commitments[2] | | % change | Exports[3] |
|---|---|---|---|---|
| | 2020/21 current MY | 2019/20 last MY | current MY from last MY | 3-yr. avg. 2017-19 |
| | | - 1,000 mt - | | |
| Mexico | 5,757 | 6,110 | (6) | 14,869 |
| Japan | 4,433 | 1,597 | 178 | 11,221 |
| Columbia | 1,444 | 580 | 149 | 4,830 |
| Korea | 339 | 71 | 378 | 4,011 |
| China | 10,551 | 60 | 17,544 | 909 |
| **Top 5 importers** | **22,524** | **8,418** | **168** | **35,840** |
| **Total U.S. corn export sales** | **30,578** | **11,405** | **168** | **49,983** |
| % of projected exports | 52% | 25% | | |
| Change from prior week[2] | **2,244** | **549** | | |
| **Top 5 importers' share of U.S. corn export sales** | 74% | 74% | | 72% |
| **USDA forecast October 2020** | **59,160** | **45,242** | **31** | |
| **Corn use for ethanol USDA forecast, October 2020** | **128,270** | **123,241** | **4** | |

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 14

**Top 5 importers[1] of U.S. soybeans**

| For the week ending 10/22/2020 | 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 | 25,996 | 6,190 | 320 | 19,106 |
| Mexico | 2,608 | 2,498 | 4 | 4,591 |
| Egypt | 1,032 | 739 | 40 | 2,980 |
| Indonesia | 727 | 504 | 44 | 2,360 |
| Japan | 744 | 781 | (5) | 2,288 |
| **Top 5 importers** | **31,107** | **10,711** | **190** | **31,324** |
| **Total U.S. soybean export sales** | **46,970** | **19,148** | **145** | **49,352** |
| % of projected exports | 78% | 42% | | |
| change from prior week[2] | **1,621** | **887** | | |
| **Top 5 importers' share of U.S. soybean export sales** | 66% | 56% | | **63%** |
| **USDA forecast, October 2020** | **59,946** | **45,668** | **131** | |

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 15

**Top 10 importers[1] of all U.S. wheat**

| For the week ending 10/22/2020 | 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 | 2,230 | 2,216 | 1 | 3,213 |
| Philippines | 2,288 | 1,727 | 32 | 2,888 |
| Japan | 1,514 | 1,517 | (0) | 2,655 |
| Nigeria | 783 | 915 | (14) | 1,433 |
| Korea | 1,053 | 830 | 27 | 1,372 |
| Indonesia | 606 | 335 | 81 | 1,195 |
| Taiwan | 678 | 730 | (7) | 1,175 |
| Thailand | 493 | 418 | 18 | 727 |
| Italy | 479 | 503 | (5) | 622 |
| Colombia | 209 | 467 | (55) | 618 |
| **Top 10 importers** | **10,331** | **9,655** | 7 | **15,897** |
| **Total U.S. wheat export sales** | **16,160** | **14,578** | 11 | **23,821** |
| % of projected exports | 61% | 55% | | |
| change from prior week[2] | **743** | **494** | | |
| **Top 10 importers' share of U.S. wheat export sales** | 64% | 66% | | 67% |
| **USDA forecast, October 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 10/29/20 | Previous week* | Current week as % of previous | 2020 YTD* | 2019 YTD* | 2020 YTD as % of 2019 YTD | Last 4-weeks as % of: Last year | Last 4-weeks as % of: Prior 3-yr. avg. | 2019 total* |
|---|---|---|---|---|---|---|---|---|---|
| **Pacific Northwest** | | | | | | | | | |
| Wheat | 162 | 272 | 60 | 13,485 | 11,806 | 114 | 64 | 85 | 13,961 |
| Corn | 130 | 2 | n/a | 8,387 | 6,922 | 121 | n/a | 47 | 7,047 |
| Soybeans | 708 | 981 | 72 | 8,515 | 8,887 | 96 | 285 | 208 | 11,969 |
| **Total** | **999** | **1,255** | **80** | **30,386** | **27,615** | **110** | **178** | **152** | **32,977** |
| **Mississippi Gulf** | | | | | | | | | |
| Wheat | 31 | 47 | 66 | 3,223 | 4,007 | 80 | 84 | 66 | 4,448 |
| Corn | 429 | 476 | 90 | 24,117 | 18,178 | 133 | 196 | 139 | 20,763 |
| Soybeans | 1,011 | 1,516 | 67 | 24,964 | 24,077 | 104 | 129 | 126 | 31,398 |
| **Total** | **1,472** | **2,039** | **72** | **52,304** | **46,262** | **113** | **143** | **127** | **56,609** |
| **Texas Gulf** | | | | | | | | | |
| Wheat | 76 | 37 | 207 | 3,958 | 5,568 | 71 | 114 | 134 | 6,009 |
| Corn | 0 | 0 | n/a | 621 | 579 | 107 | 852 | 79 | 640 |
| Soybeans | 159 | 169 | 94 | 988 | 2 | n/a | n/a | n/a | 2 |
| **Total** | **235** | **206** | **115** | **5,567** | **6,149** | **91** | **257** | **261** | **6,650** |
| **Interior** | | | | | | | | | |
| Wheat | 20 | 48 | 41 | 1,776 | 1,631 | 109 | 81 | 105 | 1,987 |
| Corn | 143 | 191 | 75 | 7,183 | 6,414 | 112 | 125 | 106 | 7,857 |
| Soybeans | 204 | 196 | 104 | 5,705 | 5,925 | 96 | 131 | 119 | 7,043 |
| **Total** | **366** | **435** | **84** | **14,664** | **13,970** | **105** | **124** | **113** | **16,887** |
| **Great Lakes** | | | | | | | | | |
| Wheat | 11 | 15 | 75 | 709 | 974 | 73 | 47 | 72 | 1,339 |
| Corn | 7 | 0 | n/a | 61 | 11 | 538 | 64 | 31 | 11 |
| Soybeans | 35 | 43 | 81 | 558 | 473 | 118 | n/a | 83 | 493 |
| **Total** | **53** | **58** | **92** | **1,329** | **1,459** | **91** | **177** | **76** | **1,844** |
| **Atlantic** | | | | | | | | | |
| Wheat | 2 | 2 | 115 | 33 | 37 | 89 | n/a | n/a | 37 |
| Corn | 0 | 0 | n/a | 33 | 99 | 33 | 648 | 106 | 99 |
| Soybeans | 75 | 61 | 122 | 938 | 1,138 | 82 | 220 | 193 | 1,353 |
| **Total** | **77** | **63** | **122** | **1,004** | **1,275** | **79** | **229** | **192** | **1,489** |
| **U.S. total from ports*** | | | | | | | | | |
| Wheat | 302 | 421 | 72 | 23,183 | 24,024 | 97 | 75 | 92 | 27,781 |
| Corn | 709 | 669 | 106 | 40,402 | 32,203 | 125 | 182 | 120 | 36,417 |
| Soybeans | 2,192 | 2,967 | 74 | 41,670 | 40,502 | 103 | 177 | 154 | 52,258 |
| **Total** | **3,203** | **4,056** | **79** | **105,255** | **96,729** | **109** | **156** | **136** | **116,457** |

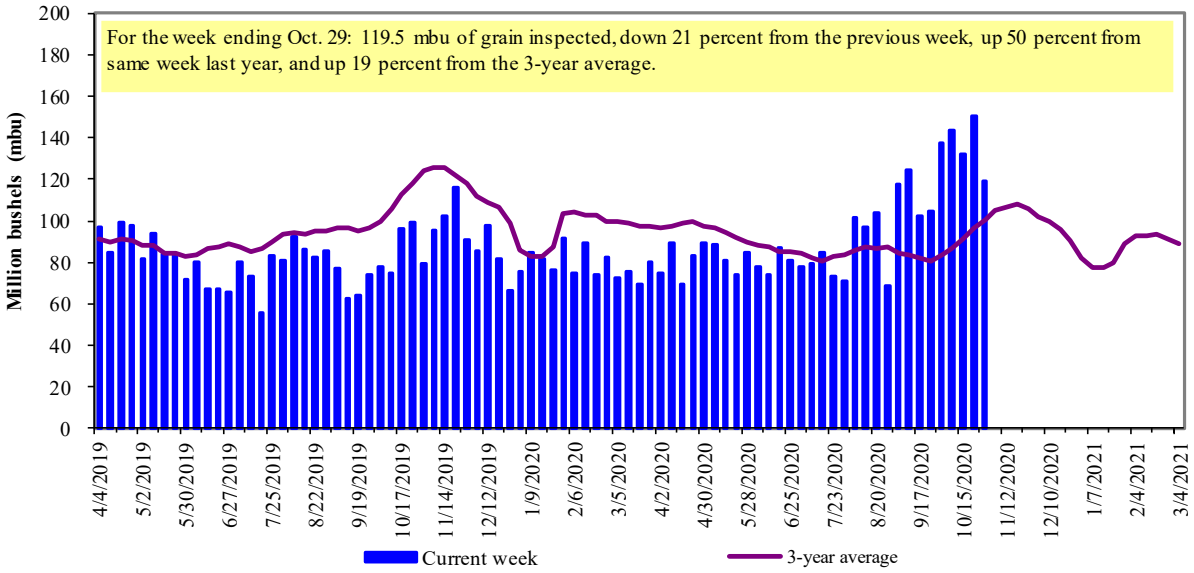
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)**

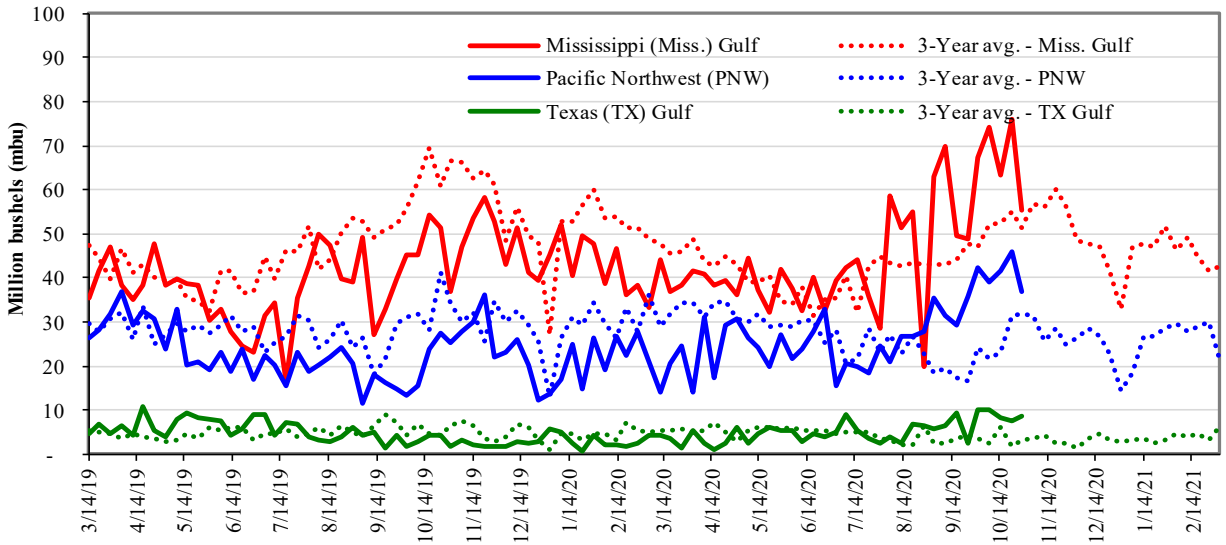



Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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




| Week ending 10/29/20 inspections (mbu): | |
|---|---|
| MS Gulf: | 55.2 |
| PNW: | 37.1 |
| TX Gulf: | 8.6 |

| Percent change from: | MS Gulf | TX Gulf | U.S. Gulf | PNW |
|---|---|---|---|---|
| Last wk: | down 28 | up 15 | down 24 | down 20 |
| Last Year (same wk): | up 50 | up 365 | up 65 | up 47 |
| 3-yr avg. (4-wk. mov. Avg): | up 4 | up 160 | up 14 | up 37 |

Source: USDA, Federal Grain Inspection Service.

Table 17

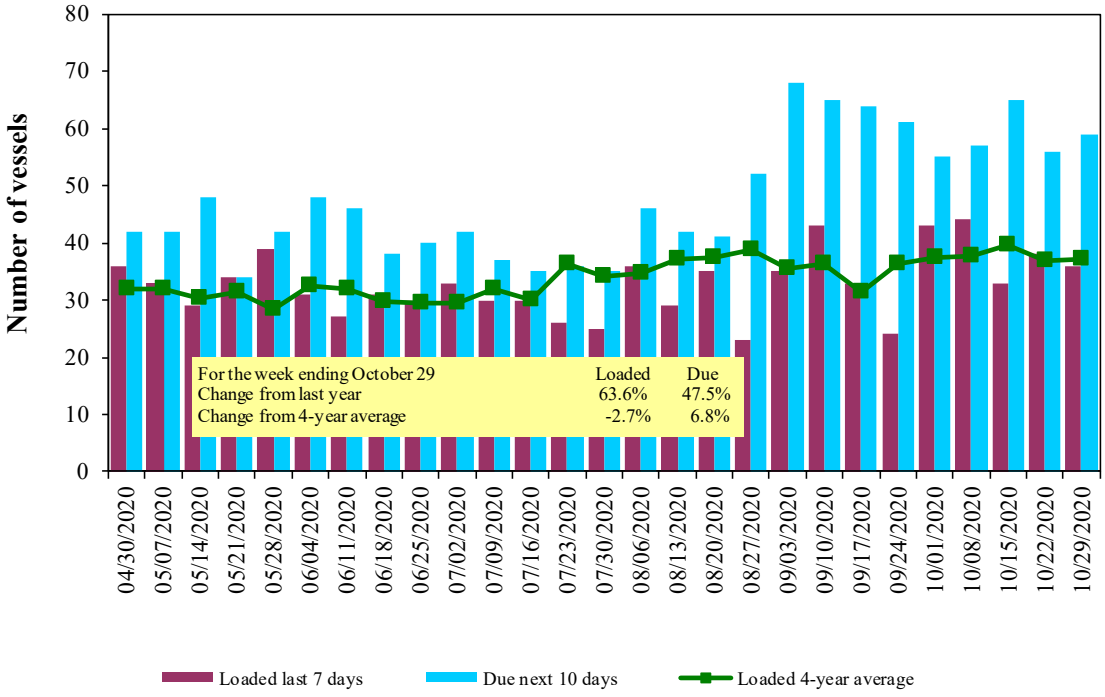
**Weekly port region grain ocean vessel activity (number of vessels)**

| | Gulf | | | Pacific Northwest |
|---|---|---|---|---|
| Date | In port | Loaded 7-days | Due next 10-days | In port |
| 10/29/2020 | 46 | 36 | 59 | 19 |
| 10/22/2020 | 56 | 38 | 56 | 16 |
| 2019 range | (26…61) | (18...44) | (33...69) | (8...33) |
| 2019 average | 40 | 31 | 49 | 17 |

Source: USDA, Agricultural Marketing Service.

Figure 16

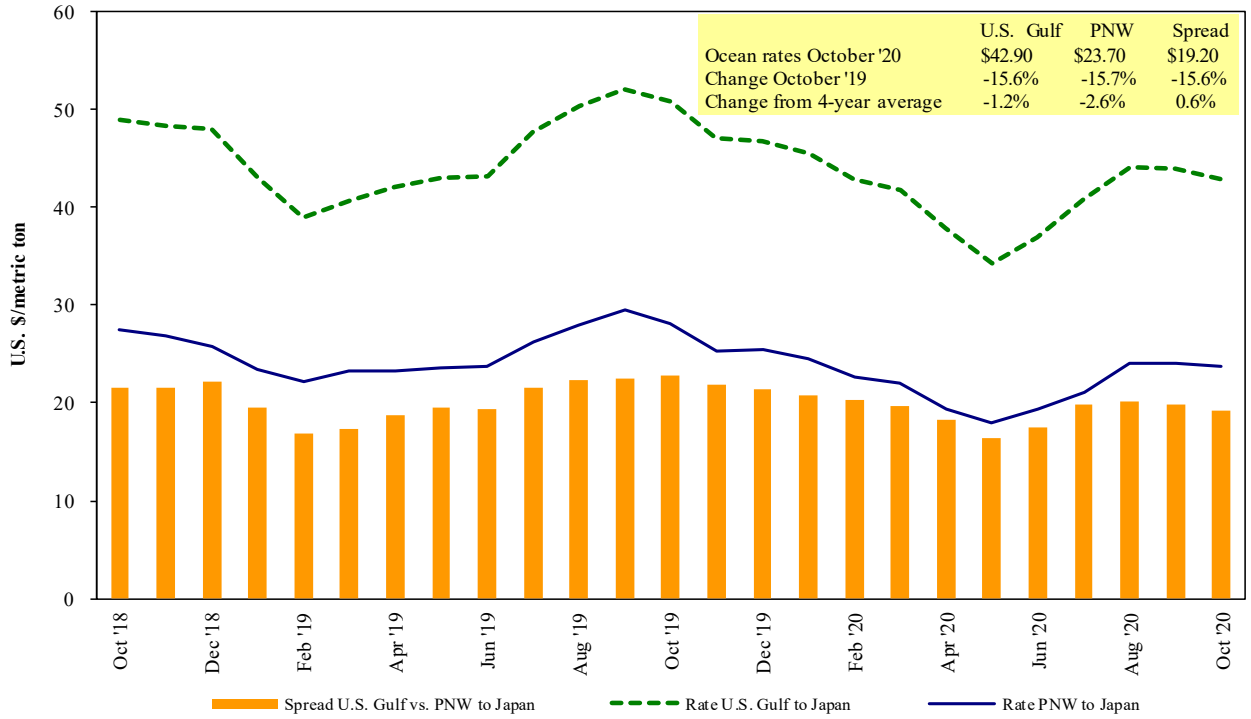
**U.S. Gulf[1] vessel loading activity**




[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 10/31/2020**

| Export region | Import region | Grain types | Loading date | Volume loads (metric tons) | Freight rate (US$/metric ton) |
|---|---|---|---|---|---|
| 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 |

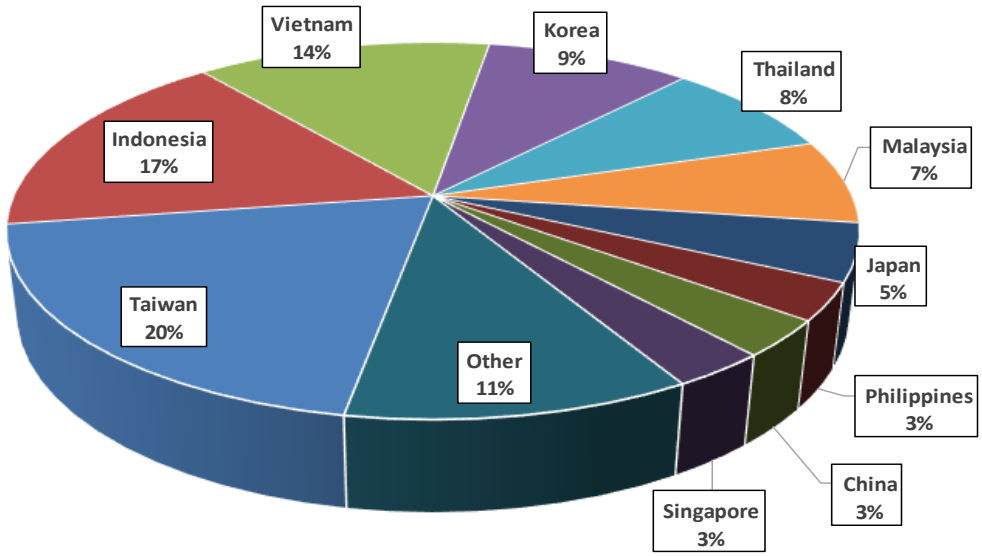
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

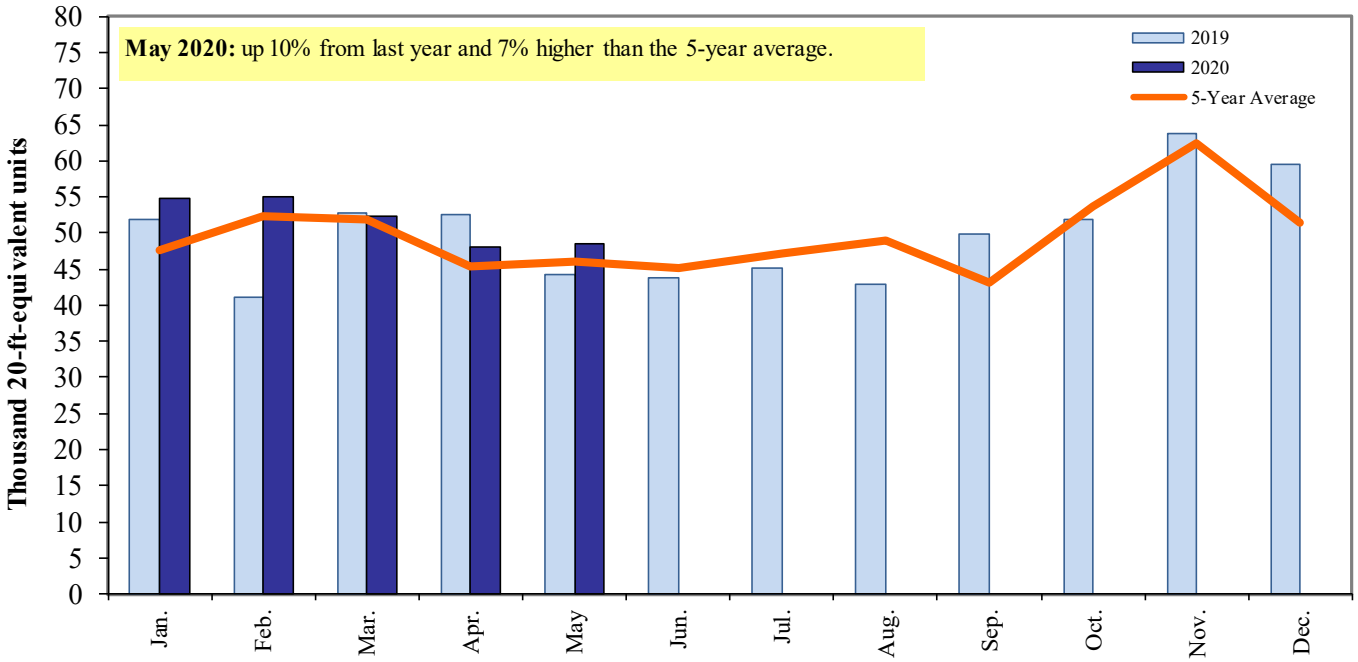
Figure 18
**Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020**




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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