



Grain Transportation Report

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

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December 31, 2020

WEEKLY HIGHLIGHTS

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Federal Spending Package Includes Key Changes to Financing of Inland Waterways Projects

The Federal spending package enacted on December 27 [dedicates resources](#) for the Water Resources Development Act (WRDA) of 2020. Among other initiatives, WRDA 2020 substantially adjusts the financing structure of projects for the construction and major rehabilitation of inland waterways. Under the new law, the Treasury's general fund will finance 65 percent of the cost, and the Inland Waterways Trust Fund will cover 35 percent (modifying the former 50-50 split). The adjusted cost shares apply to projects that begin between fiscal years 2021 and 2031. The funding change should make additional general funds available to the U.S. Army Corps of Engineers for authorized inland waterway construction projects over the next 10 years.

Port of New Orleans Begins Project To Develop New Container Terminal

On December 17, the Board of Commissioners for the Port of New Orleans authorized the Port to acquire a new property in Violet, LA, 7.5 miles southeast of New Orleans. As part of the Port's long-term infrastructure investment, the new \$1.5 billion multimodal container terminal will be developed on the property. [According to the Port's website](#), demand for container business at the Port has doubled since 2010. To accommodate this growing business, the Port is in the process of adding four new 100-gauge gantry cranes and improving its facilities. The new downriver terminal in Violet is expected to enhance the Port's capacity to handle rising demand and support ancillary logistics. Over the next 2 years, the Port plans to work closely with the public and stakeholders to review traffic and environmental concerns and to identify potential alternatives.

Diesel Fuel Prices Reach a 9-Month High

For the week ending December 28, the U.S. [average diesel price](#) increased by 1.6 cents from the previous week to \$2.635 per gallon. This marks an increase for the 8th consecutive week and a 9-month high. The average diesel price is still 43.4 cents below the same time last year. Facing prices that are still sharply lower than last year's, many U.S. refiners have found their revenues are insufficient to support refining margins. [According to the Department of Energy's Energy Information Administration](#), as of September 1, several U.S. refineries had closed permanently, and others had closed temporarily while they were converting into renewable diesel plants.

Snapshots by Sector

Export Sales

For the week ending December 17, [unshipped balances](#) of wheat, corn, and soybeans totaled 55.1 million metric tons (mmt). This was 6 percent lower than last week, but still represented a significant increase in outstanding sales from the same time last year. Net [corn export sales](#) were 0.651 mmt, down 66 percent from the past week. Net [soybean export sales](#) were 0.353 mmt, down 62 percent from the previous week. Net [wheat export sales](#) were 0.394 mmt, down 27 percent from the previous week.

Rail

U.S. Class I railroads originated 25,860 [grain carloads](#) during the week ending December 19. This was a 9-percent decrease from the previous week, 20 percent more than last year, and 13 percent more than the 3-year average.

Average January shuttle [secondary railcar](#) bids/offers (per car) were \$568 above tariff for the week ending December 24. This was \$128 more than last week and \$931 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending December 26, [barge grain movements](#) totaled 1,004,507 tons. This was 1 percent higher than the previous week and 69 percent more than the same period last year.

For the week ending December 26, 579 grain barges [moved down river](#)—38 barges fewer than the previous week. There were 919 grain barges [unloaded in New Orleans](#), 16 percent lower than the previous week.

Ocean

For the week ending December 24, 46 [oceangoing grain vessels](#) were loaded in the Gulf—53 percent more than the same period last year. Within the next 10 days (starting December 25), 57 vessels were expected to be loaded—19 percent more than the same period last year.

Feature Article/Calendar

Dear Readers,

We commend you for your tremendous efforts to keep food moving from farm to table in this extraordinary year. Agricultural and transportation professionals met the challenges of 2020 with great tenacity and resilience. In the highly competitive, ever-evolving business of U.S. grain, we know that insightful, timely, and reliable information is key to your decisions. Through the *Grain Transportation Report (GTR)* and our other products, we strive to provide the information you need. This year, *GTR* staff wrapped up a number of [cooperative research projects funded by USDA's Agricultural Marketing Service](#). These included studies on such topics as the importance of highways for U.S. agriculture, the feasibility of an inland container terminal in the Pacific Northwest, the legal and economic context of railroads' common carrier obligation, and the development and role of rail shipping mechanisms for grain. In June, we rolled out "AgTransport 2.0," an expanded and upgraded version of our [Agricultural Transportation Open Data Platform](#).

Synopsis of Agricultural Transportation in 2020

- **High grain inspections.** Total year-to-date (YTD) grain inspections for export are nearing 2016's record level. As of December 24, YTD inspections were at 136 million metric tons (mmt), up 17 percent from the same time last year, with corn increasing 29 percent and soybeans rising 19 percent. Soybeans inspected for export to China have increased significantly from last year, as demand for feed continued to grow. Higher grain inspections fueled barge and rail grain shipments in 2020.
- **Barge grain movements increase.** Despite a slow start, navigation challenges, and the closure of the Illinois River between July and October, downbound grain barge shipments eventually reached 39.3 million tons by December 26, 34 percent higher than 2019 and slightly less than the 4-year average. Rates followed a similar pattern, starting low in the first two quarters because of weak export demand, adverse water conditions, and market uncertainty. At the beginning of September, rates emerged from their slump and started to increase quickly, driven by higher grain demand from China and a strong early harvest. Unexpected delays and closures on the Illinois and Ohio Rivers are expected to improve early next year.
- **Above-average weekly grain carloads since August.** Grain carloads—which were relatively flat and below average for much of the year—accelerated from mid-July through December. Since September (through December 19), grain carloads originated by U.S. Class I railroads were 20 percent higher than the prior 3-year average, reaching a record weekly total in November. Over the year, increased demand for rail service was associated with higher premiums for rail cars in the secondary auction market. Despite the high volumes, grain train performance was generally good this year—speeds did slow with higher traffic, and most metrics remained on par with recent years.
- **Fuel prices below the 3-year average.** Average diesel fuel prices from January through November were 14 percent below the 3-year average. Sharp drops in fuel demand caused petroleum inventories to reach near record-high levels and pushed prices to unexpected lows. However, the strong holiday shipping season pushed prices up by over 26 cents per gallon in the final weeks of the year.

Happy New Year

We hope our insight and analysis facilitated better transportation and marketing decisions in 2020, and we look forward to continuing to serve you in 2021. Many thanks to all industry and government representatives whose tireless work provides the necessary information and data to produce this report. We wish all our readers and contributors a safe, healthy, and prosperous New Year!

Sincerely,

[The GTR Team](#)

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
12/30/20	177	288	245	232	n/a	n/a
12/23/20	176	288	239	229	188	168

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

Source: USDA, Agricultural Marketing Service.

Table 2

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

Commodity	Origin-destination	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.

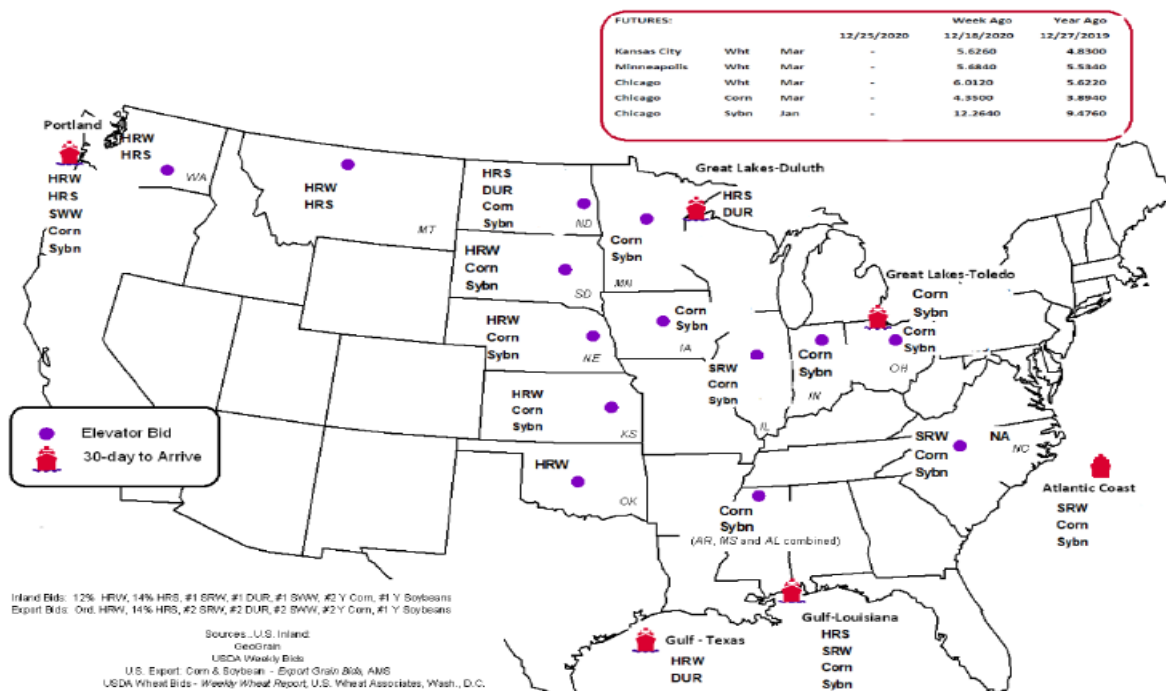
Source: USDA, Agricultural Marketing Service.

Note: No data is available for 12/25 because of the holiday.

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

Note: No data is available for 12/25/2020 because of the holiday.



Rail Transportation

Table 3

Rail deliveries to port (carloads)¹

For the week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
12/23/2020 ^p	1,935	1,801	8,513	747	12,996	12/19/2020	2,385
12/16/2020 ^r	1,713	1,874	7,909	1,054	12,550	12/12/2020	1,939
2020 YTD ^r	44,235	62,661	292,775	23,383	423,054	2020 YTD	123,985
2019 YTD ^r	40,974	51,167	251,181	16,192	359,514	2019 YTD	127,326
2020 YTD as % of 2019 YTD	108	122	117	144	118	% change YTD	97
Last 4 weeks as % of 2019 ²	411	392	211	543	259	Last 4wks. % 2019	90
Last 4 weeks as % of 4-year avg. ²	412	170	145	204	168	Last 4wks. % 4 yr.	107
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,674

¹Data is incomplete as it is voluntarily provided.

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

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

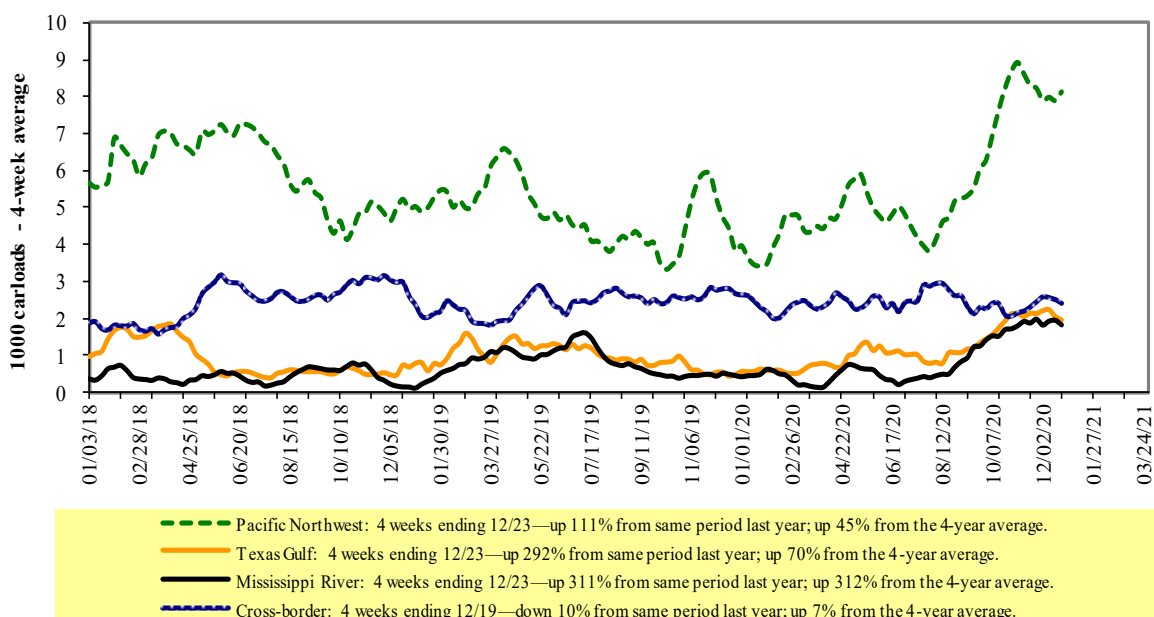
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

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

Figure 2

Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

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

For the week ending: 12/19/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,440	2,583	13,169	1,156	6,512	25,860	5,211	7,475
This week last year	1,789	2,450	11,770	1,272	4,304	21,585	3,989	5,512
2020 YTD	88,505	126,647	589,307	55,943	283,740	1,144,142	230,302	252,576
2019 YTD	90,619	135,084	560,605	57,889	255,988	1,100,185	209,654	232,765
2020 YTD as % of 2019 YTD	98	94	105	97	111	104	110	109
Last 4 weeks as % of 2019*	135	111	121	103	143	125	129	127
Last 4 weeks as % of 3-yr. avg.**	126	105	117	107	135	119	143	128
Total 2019	91,611	136,933	568,369	58,527	260,269	1,115,709	212,354	235,892

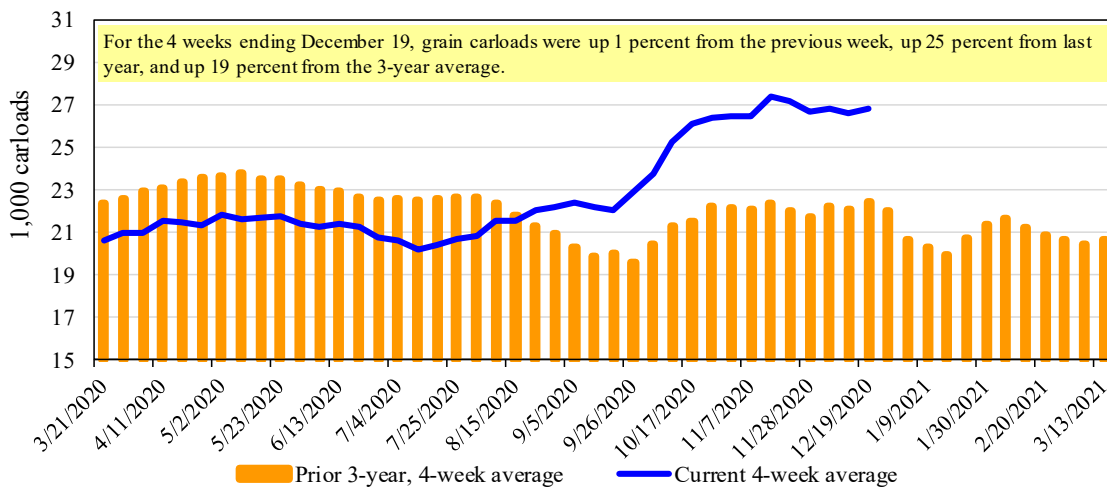
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

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

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

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads

Source: Association of American Railroads.

Table 5

Railcar auction offerings¹ (\$/car)²

For the week ending: 12/24/2020		<u>Delivery period</u>							
		Jan-21	Jan-20	Feb-21	Feb-20	Mar-21	Mar-20	Apr-21	Apr-20
BNSF ³	COT grain units	0	n/a	0	n/a	0	n/a	no bids	n/a
	COT grain single-car	427	n/a	209	n/a	55	n/a	0	n/a
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no bid	n/a	n/a

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

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

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

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

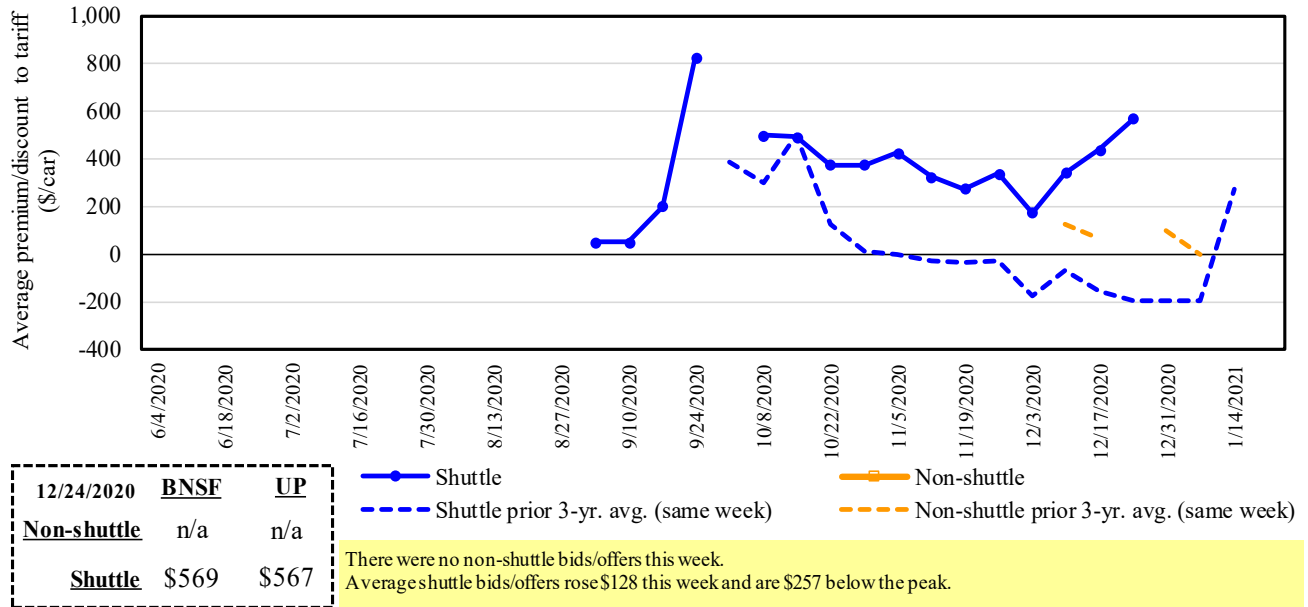
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

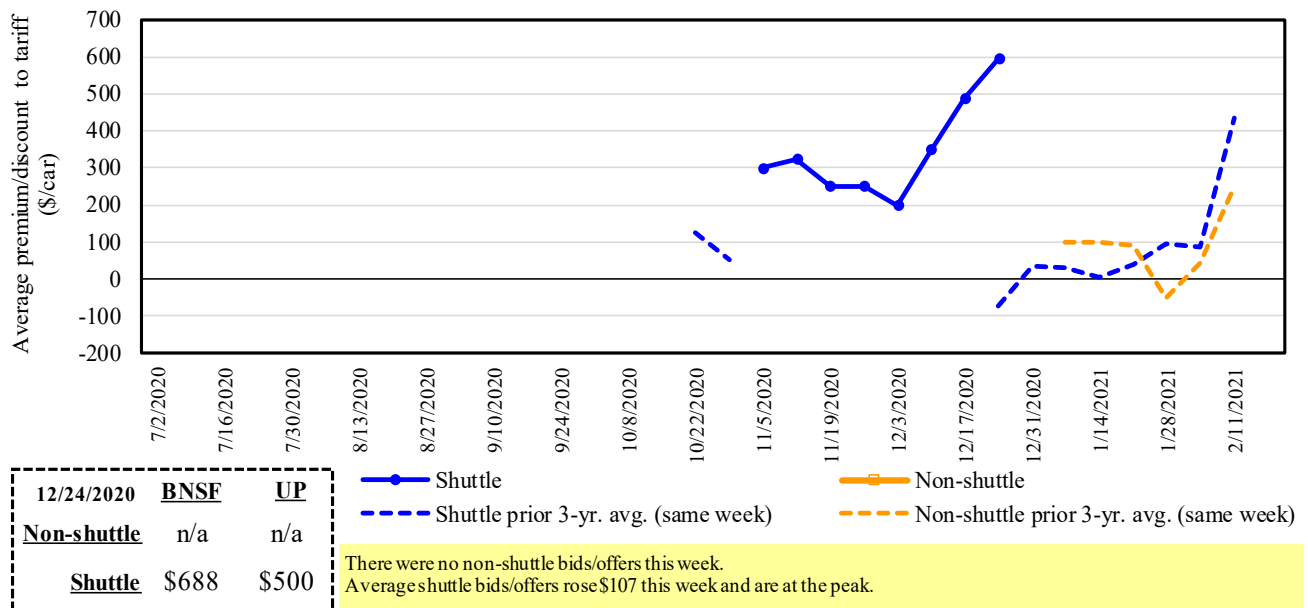
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/offers for railcars to be delivered in January 2021, secondary market



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

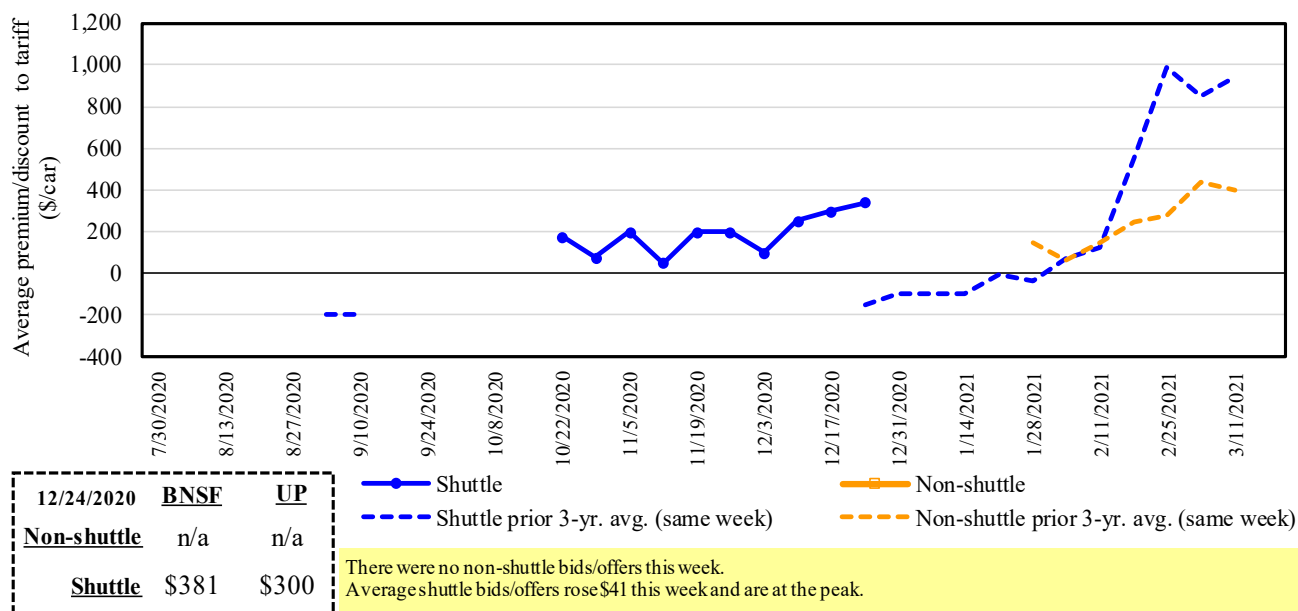
Figure 5
Bids/offers for railcars to be delivered in February 2021, secondary market



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

Figure 6

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



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

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending: 12/24/2020		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	569	688	381	175	(50)	(25)
	Change from last week	19	88	56	37	0	(25)
	Change from same week 2019	919	n/a	n/a	n/a	n/a	n/a
	UP-Pool	567	500	300	8	n/a	n/a
	Change from last week	238	125	25	16	n/a	n/a
	Change from same week 2019	942	700	n/a	n/a	n/a	n/a

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

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

BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

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

Table 7

Tariff rail rates for unit and shuttle train shipments¹

December 2020	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$30	\$39.85	\$1.08	-2
	Grand Forks, ND	Duluth-Superior, MN	\$4,208	\$0	\$41.79	\$1.14	-3
	Wichita, KS	Los Angeles, CA	\$7,115	\$0	\$70.66	\$1.92	-2
	Wichita, KS	New Orleans, LA	\$4,525	\$53	\$45.47	\$1.24	-3
	Sioux Falls, SD	Galveston-Houston, TX	\$6,851	\$0	\$68.03	\$1.85	-2
	Colby, KS	Galveston-Houston, TX	\$4,801	\$59	\$48.26	\$1.31	-3
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$81	\$51.66	\$1.41	-4
	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$60	\$39.33	\$1.00	-3
	Toledo, OH	Raleigh, NC	\$7,833	\$0	\$77.79	\$1.98	15
	Des Moines, IA	Davenport, IA	\$2,455	\$13	\$24.51	\$0.62	0
	Indianapolis, IN	Atlanta, GA	\$5,979	\$0	\$59.37	\$1.51	3
	Indianapolis, IN	Knoxville, TN	\$5,040	\$0	\$50.05	\$1.27	3
Soybeans	Des Moines, IA	Little Rock, AR	\$3,900	\$38	\$39.10	\$0.99	0
	Des Moines, IA	Los Angeles, CA	\$5,780	\$109	\$58.48	\$1.49	-3
	Minneapolis, MN	New Orleans, LA	\$3,631	\$22	\$36.28	\$0.99	-4
	Toledo, OH	Huntsville, AL	\$6,595	\$0	\$65.49	\$1.78	17
	Indianapolis, IN	Raleigh, NC	\$7,125	\$0	\$70.75	\$1.93	3
	Indianapolis, IN	Huntsville, AL	\$5,247	\$0	\$52.11	\$1.42	3
	Champaign-Urbana, IL	New Orleans, LA	\$4,645	\$60	\$46.73	\$1.27	-3
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,018	\$0	\$39.90	\$1.09	-3
	Wichita, KS	Galveston-Houston, TX	\$4,236	\$0	\$42.07	\$1.14	-3
	Chicago, IL	Albany, NY	\$6,376	\$0	\$63.32	\$1.72	-10
	Grand Forks, ND	Portland, OR	\$5,676	\$0	\$56.37	\$1.53	-2
	Grand Forks, ND	Galveston-Houston, TX	\$5,996	\$0	\$59.54	\$1.62	-2
	Colby, KS	Portland, OR	\$6,012	\$96	\$60.65	\$1.65	-4
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	0
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,820	\$60	\$38.53	\$0.98	-4
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
	Des Moines, IA	Amarillo, TX	\$4,320	\$47	\$43.37	\$1.10	0
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,100	\$0	\$50.65	\$1.29	2
	Sioux Falls, SD	Tacoma, WA	\$5,850	\$0	\$58.09	\$1.58	0
	Minneapolis, MN	Portland, OR	\$5,900	\$0	\$58.59	\$1.59	0
	Fargo, ND	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	0
	Council Bluffs, IA	New Orleans, LA	\$4,875	\$70	\$49.10	\$1.34	-3
	Toledo, OH	Huntsville, AL	\$4,945	\$0	\$49.11	\$1.34	3
	Grand Island, NE	Portland, OR	\$5,260	\$98	\$53.21	\$1.45	-13

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of

75-120 cars that meet railroad efficiency requirements.

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

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

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

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

Table 8

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

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

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

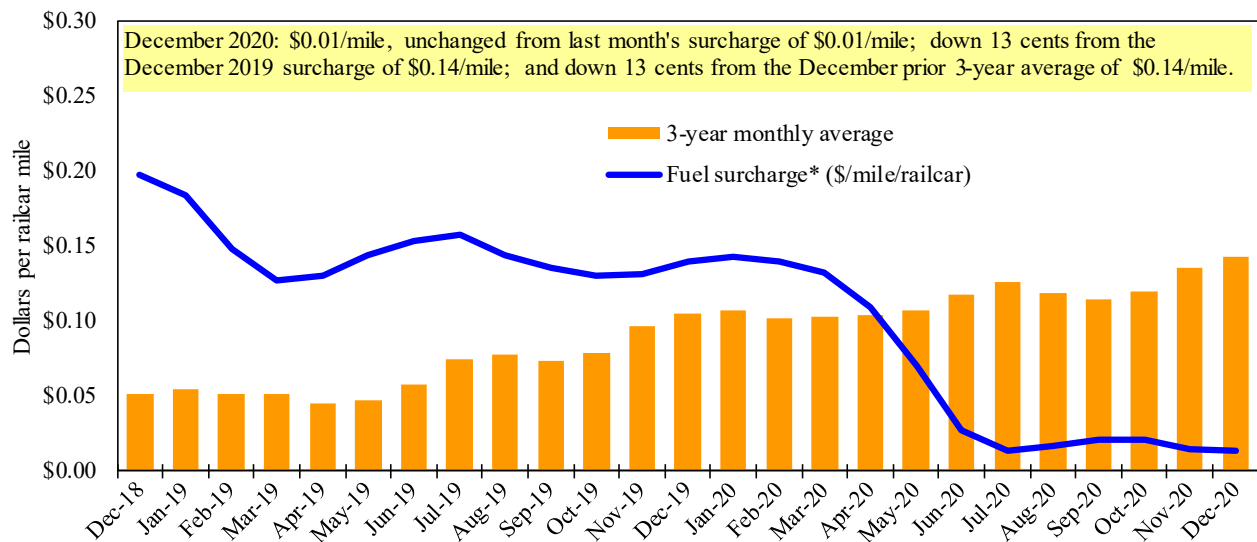
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

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

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

Figure 7

Railroad fuel surcharges, North American weighted average¹

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

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

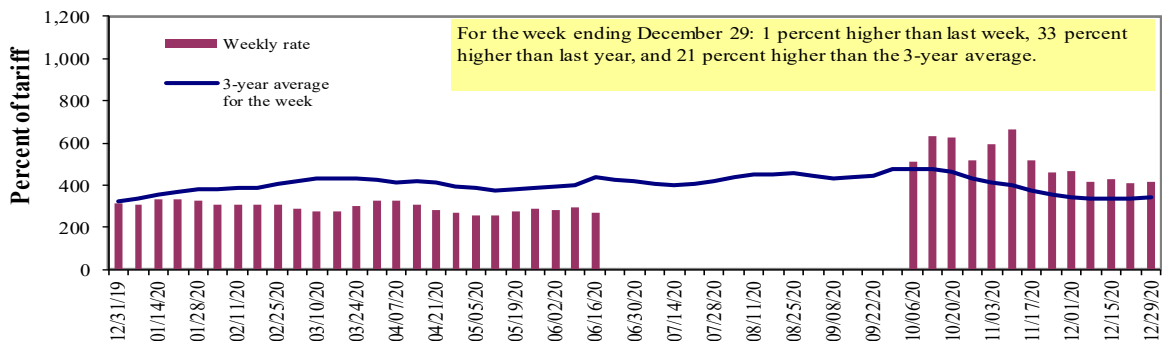
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

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



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

³No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.

Source: USDA, Agricultural Marketing Service.

Table 9

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	12/29/2020	-	-	418	323	348	348	278
	12/22/2020	-	-	413	308	353	353	274
\$/ton	12/29/2020	-	-	19.40	12.89	16.32	14.06	8.73
	12/22/2020	-	-	19.16	12.29	16.56	14.26	8.60
Current week % change from the same week:								
	Last year	-	-	33	46	43	43	32
	3-year avg. ²	-	-	21	27	19	19	24
Rate¹	January	-	-	419	315	334	334	276
	March	-	-	376	283	308	308	263

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

Source: USDA, Agricultural Marketing Service.

**Figure 9
Benchmark tariff rates**

Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

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

Map Credit: USDA, Agricultural Marketing Service

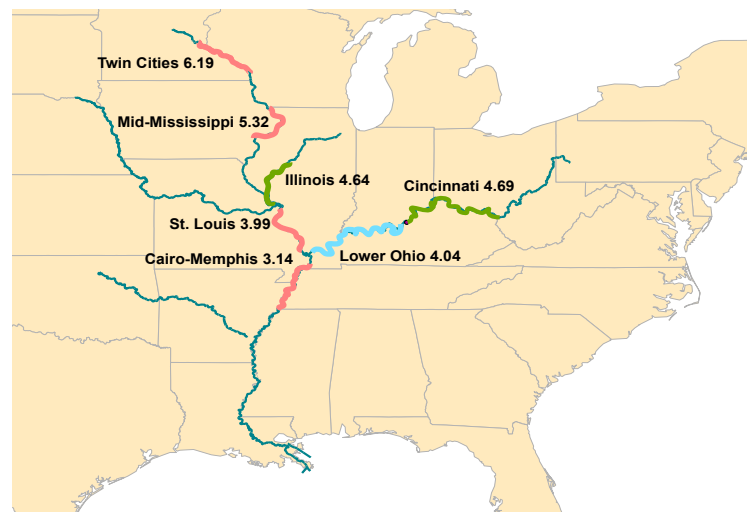
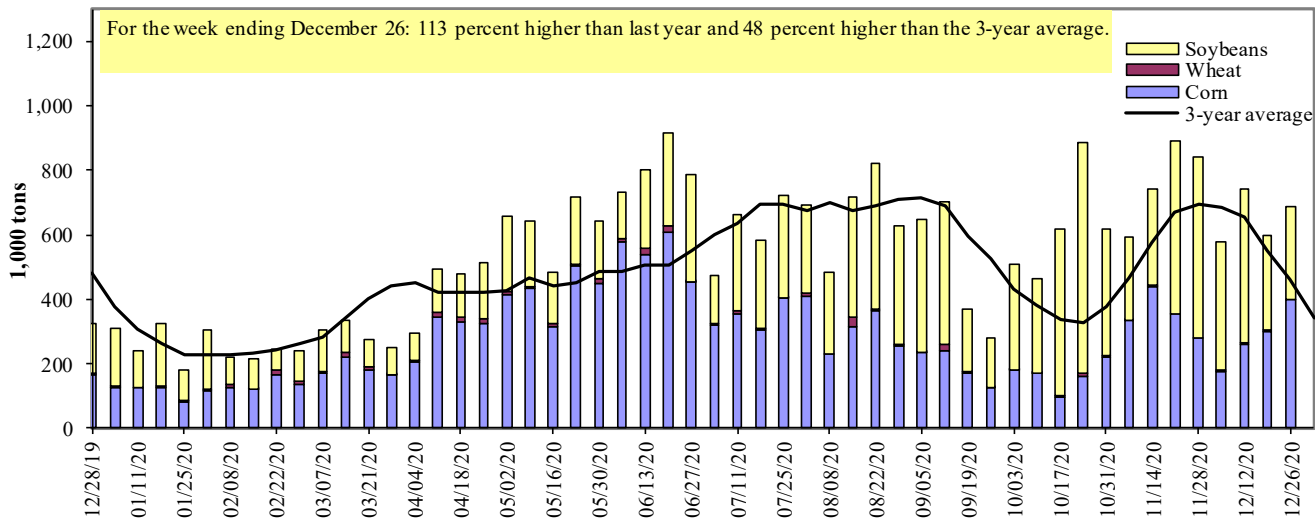


Figure 10

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



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

Source: U.S. Army Corps of Engineers.

Table 10

Barge grain movements (1,000 tons)

For the week ending 12/26/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	52	0	45	0	96
Alton, IL (L26)	413	0	297	0	709
Granite City, IL (L27)	397	0	289	0	685
Illinois River (La Grange)	298	0	203	0	501
Ohio River (Olmsted)	100	0	166	13	279
Arkansas River (L1)	0	13	28	0	40
Weekly total - 2020	497	13	482	13	1,005
Weekly total - 2019	247	15	330	2	595
2020 YTD ¹	18,515	1,752	18,808	237	39,312
2019 YTD ¹	12,780	1,631	14,683	154	29,247
2020 as % of 2019 YTD	145	107	128	154	134
Last 4 weeks as % of 2019 ²	138	59	141	242	137
Total 2019	12,780	1,631	14,683	154	29,247

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

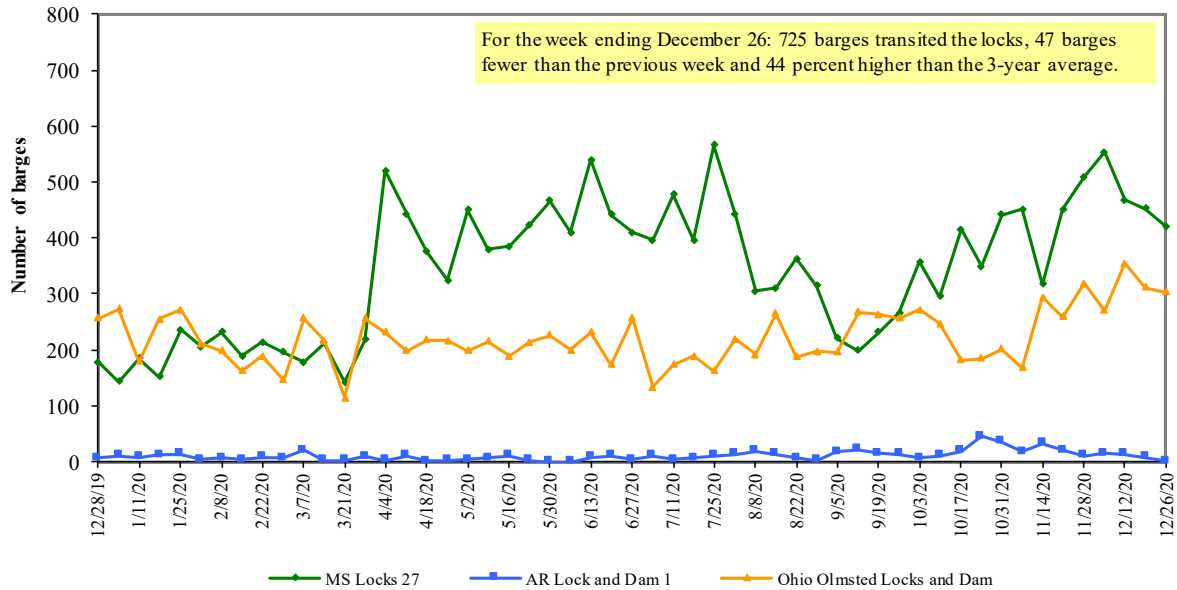
² As a percent of same period in 2019.

Note: Total may not add exactly because of rounding. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

Source: U.S. Army Corps of Engineers.

Figure 11

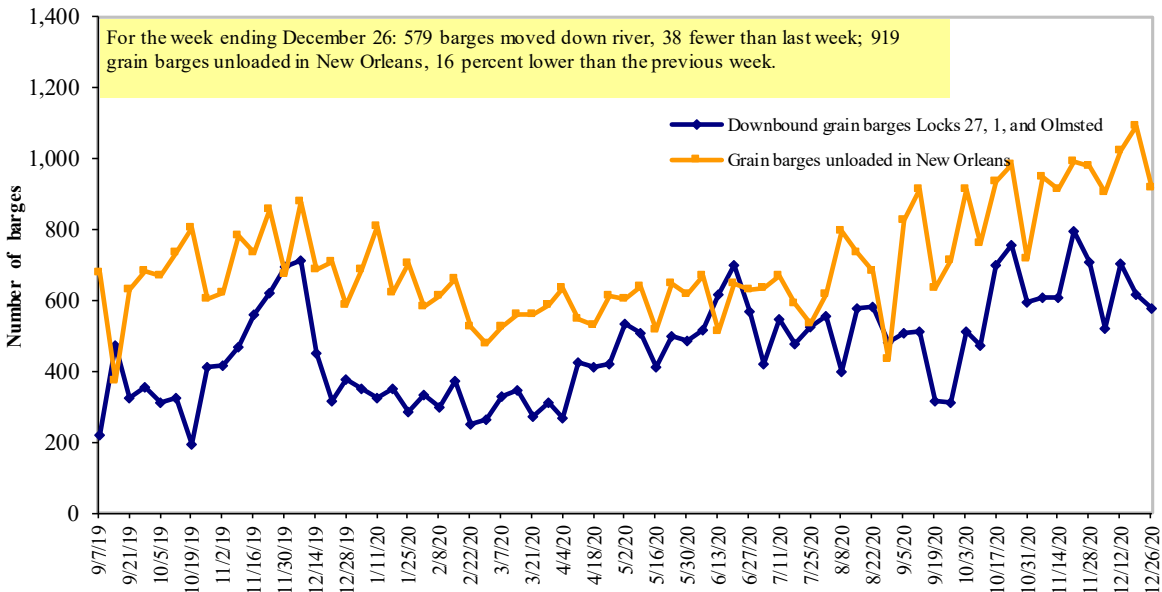
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-highway diesel prices, week ending 12/28/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.659	0.007	-0.437
	New England	2.652	0.018	-0.462
	Central Atlantic	2.850	0.015	-0.421
	Lower Atlantic	2.534	0.001	-0.441
II	Midwest	2.585	0.026	-0.393
III	Gulf Coast	2.393	0.014	-0.415
IV	Rocky Mountain	2.588	0.006	-0.525
	West Coast	3.113	0.016	-0.510
V	West Coast less California	3.399	0.631	0.125
	California	2.770	-0.600	-1.129
Total	United States	2.635	0.016	-0.434

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

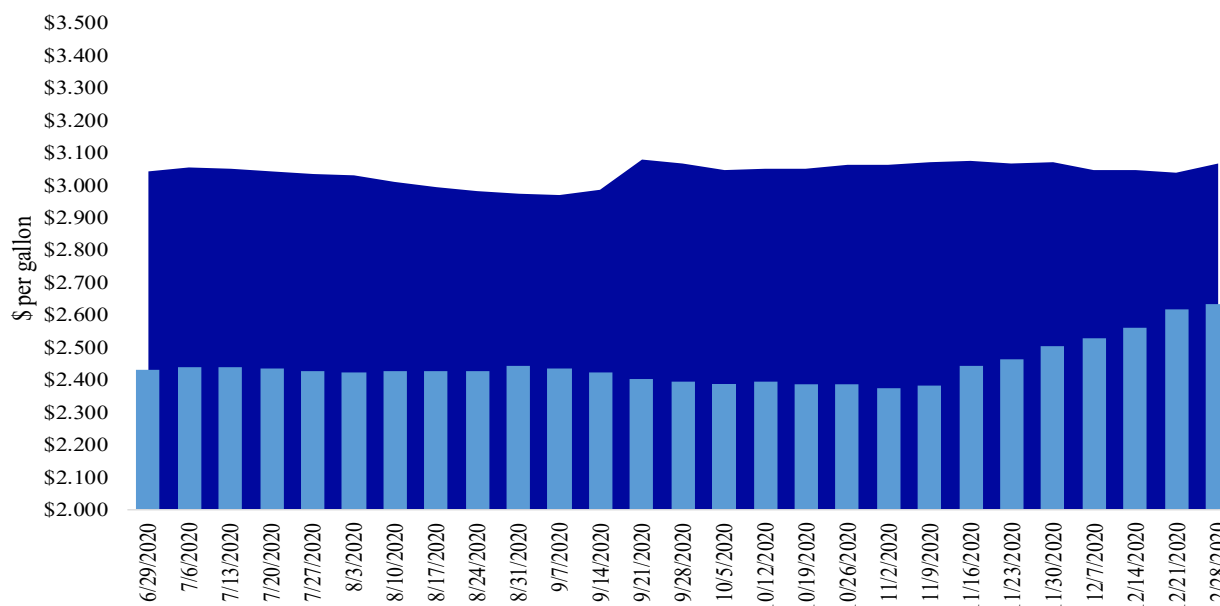
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending December 28, the U.S. average diesel fuel price increased 1.6 cents from the previous week to \$2.635 per gallon, 43.4 cents below the same week last year.

■ Last year ■ Current year
\$3.069 \$2.635



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

Grain Exports

Table 12

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

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances¹									
12/17/2020	1,661	496	1,596	2,633	128	6,514	29,342	19,256	55,112
This week year ago	1,489	558	1,386	1,104	196	4,732	9,896	9,317	23,944
Cumulative exports-marketing year²									
2020/21 YTD	5,408	1,038	3,923	2,699	462	13,529	12,889	34,902	61,320
2019/20 YTD	5,312	1,523	3,821	2,582	572	13,809	7,928	19,769	41,506
YTD 2020/21 as % of 2019/20	102	68	103	105	81	98	163	177	148
Last 4 wks. as % of same period 2019/20*	108	77	112	234	78	134	291	239	240
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327

¹ Current unshipped (outstanding) export sales to date.

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

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

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers¹ of U.S. corn

For the week ending 12/17/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	- 1,000 mt -			
Mexico	9,690	8,748	11	14,869
Japan	5,233	2,628	99	11,221
Columbia	1,946	1,402	39	4,830
Korea	1,060	11	9,623	4,011
China	11,564	60	19,238	909
Top 5 importers	29,492	12,849	130	35,840
Total U.S. corn export sales	42,231	17,823	137	49,983
% of projected exports	63%	39%		
Change from prior week ²	651	625		
Top 5 importers' share of U.S. corn export sales	70%	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 (carry over plus accumulated export); yr. = year; avg. = average.

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

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers¹ of U.S. soybeans

For the week ending 12/17/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	1,000 mt -			- 1,000 mt -
China	31,800	10,937	191	19,106
Mexico	3,387	2,849	19	4,591
Egypt	1,755	1,229	43	2,980
Indonesia	1,040	872	19	2,360
Japan	1,134	1,155	(2)	2,288
Top 5 importers	39,117	17,042	130	31,324
Total U.S. soybean export sales	54,158	29,085	86	49,352
% of projected exports	90%	64%		
change from prior week ²	353	660		
Top 5 importers' share of U.S. soybean export sales	72%	59%		63%
USDA forecast, December 2020	59,946	45,668	131	

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 15

Top 10 importers¹ of all U.S. wheat

For the week ending 12/17/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	1,000 mt -			- 1,000 mt -
Mexico	2,660	2,675	(1)	3,213
Philippines	2,531	2,412	5	2,888
Japan	1,933	1,918	1	2,655
Nigeria	1,009	1,015	(1)	1,433
Korea	1,410	1,006	40	1,372
Indonesia	767	581	32	1,195
Taiwan	857	974	(12)	1,175
Thailand	696	630	10	727
Italy	534	615	(13)	622
Colombia	299	546	(45)	618
Top 10 importers	12,695	12,372	3	15,897
Total U.S. wheat export sales	20,043	18,541	8	23,821
% of projected exports	75%	71%		
change from prior week ²	394	715		
Top 10 importers' share of U.S. wheat export sales	63%	67%		67%
USDA forecast, December 2020	26,839	26,294	2	

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 16

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

Port regions	For the week ending 12/24/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of:		2019 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	183	266	69	15,566	13,961	111	95	87	13,961
Corn	260	247	105	9,697	7,047	138	n/a	160	7,047
Soybeans	426	575	74	13,678	11,969	114	225	224	11,969
Total	869	1,088	80	38,941	32,977	118	192	152	32,977
Mississippi Gulf									
Wheat	25	14	180	3,401	4,448	76	37	28	4,448
Corn	573	325	176	28,032	20,763	135	144	112	20,763
Soybeans	719	1,886	38	36,567	31,398	116	169	177	31,398
Total	1,318	2,226	59	68,000	56,609	120	157	150	56,609
Texas Gulf									
Wheat	26	17	152	4,248	6,009	71	58	42	6,009
Corn	0	13	0	711	640	111	47	70	640
Soybeans	77	169	46	1,978	2	n/a	n/a	n/a	2
Total	104	200	52	6,937	6,650	104	237	182	6,650
Interior									
Wheat	85	61	140	2,233	1,987	112	116	156	1,987
Corn	136	147	93	8,563	7,857	109	112	124	7,857
Soybeans	186	169	110	7,153	7,043	102	119	137	7,043
Total	407	377	108	17,950	16,887	106	116	134	16,887
Great Lakes									
Wheat	0	55	0	891	1,339	67	45	59	1,339
Corn	7	24	28	111	11	980	n/a	n/a	11
Soybeans	25	62	39	1,111	493	225	n/a	497	493
Total	31	141	22	2,113	1,844	115	184	197	1,844
Atlantic									
Wheat	0	0	n/a	65	37	175	n/a	0	37
Corn	0	0	n/a	33	99	33	n/a	0	99
Soybeans	90	90	100	1,792	1,353	132	365	191	1,353
Total	90	90	100	1,890	1,489	127	365	188	1,489
U.S. total from ports*									
Wheat	320	413	77	26,403	27,781	95	83	77	27,781
Corn	976	757	129	47,147	36,417	129	172	125	36,417
Soybeans	1,523	2,952	52	62,280	52,258	119	193	196	52,258
Total	2,819	4,121	68	135,830	116,457	117	165	151	116,457

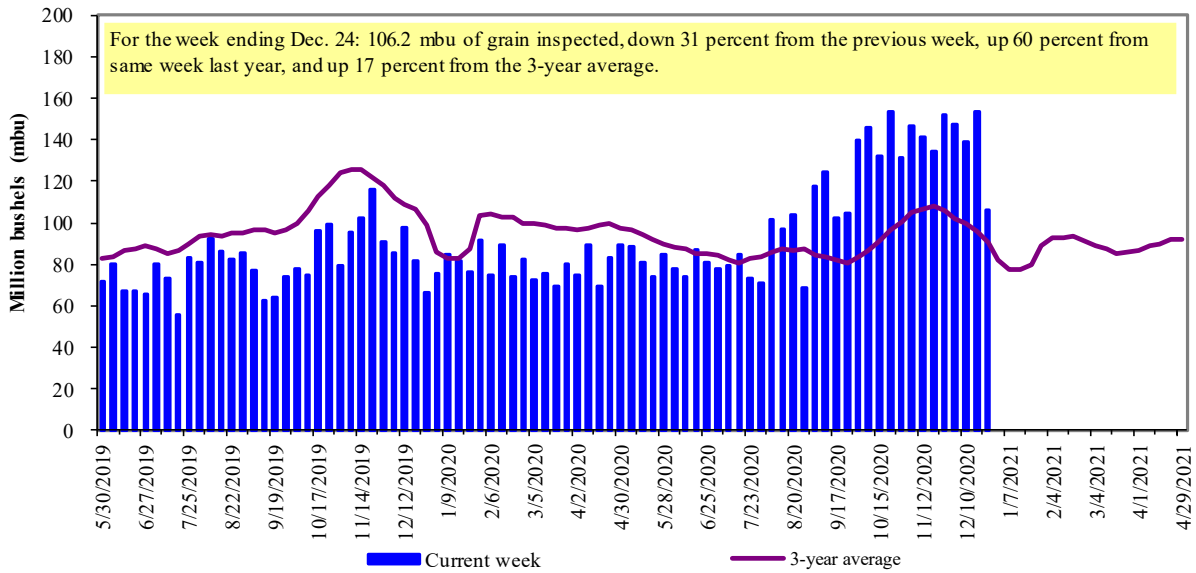
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

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

Figure 14

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

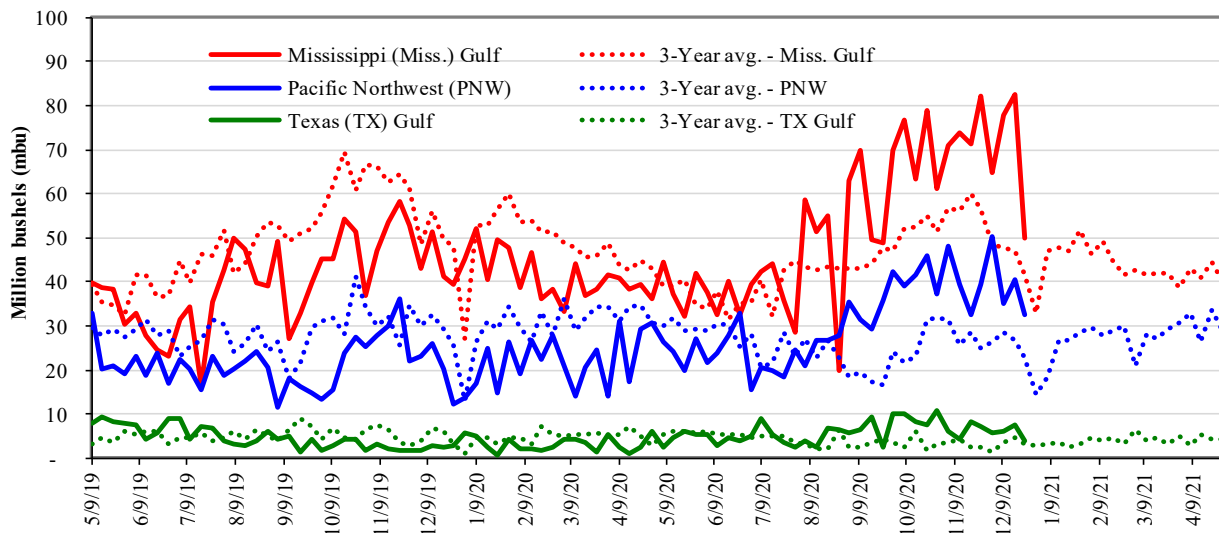


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 12/24/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 49.9	Last wk:	down 40	down 48	down 40	down 20
PNW: 32.6	Last Year (same wk):	up 27	up 38	up 28	up 164
TX Gulf: 3.8	3-yr avg. (4-wk. mov. Avg):	up 8	up 20	up 9	up 25

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

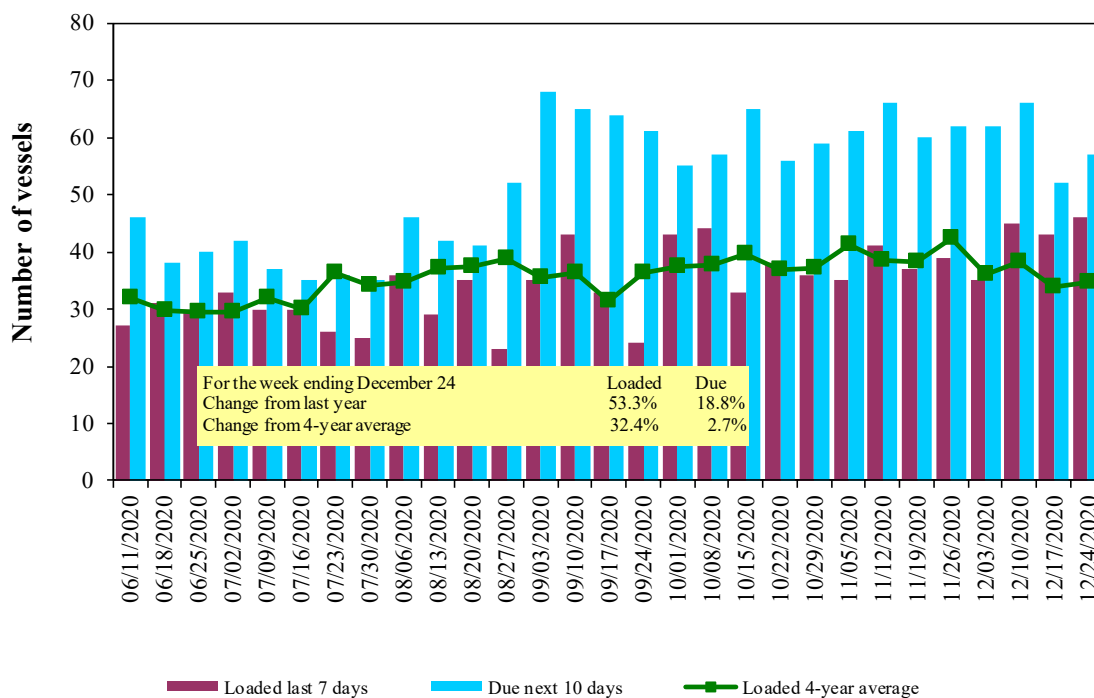
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/24/2020	50	46	57	20
12/17/2020	59	43	52	19
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

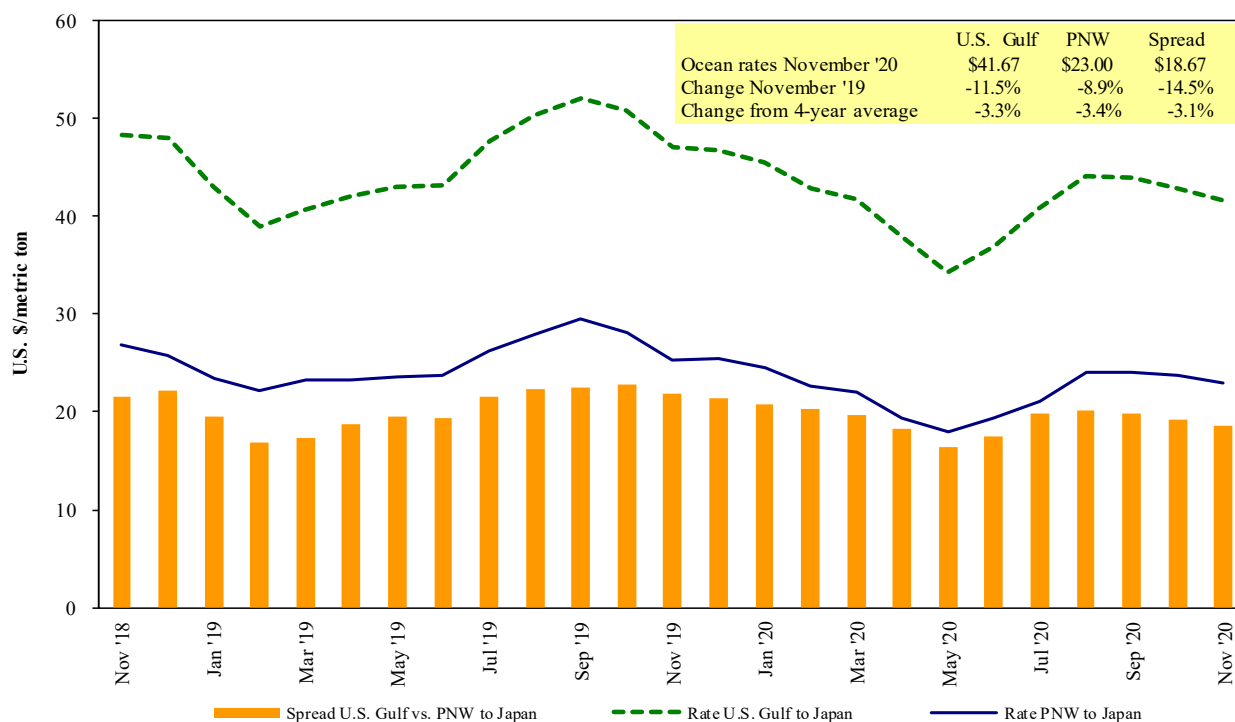
U.S. Gulf¹ vessel loading activity



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

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

Ocean freight rates for selected shipments, week ending 12/26/2020

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.

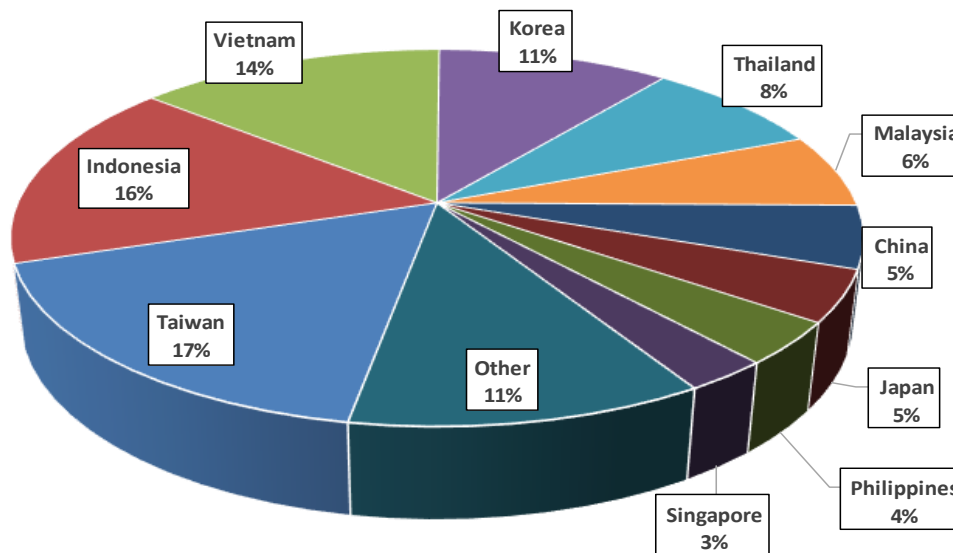
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

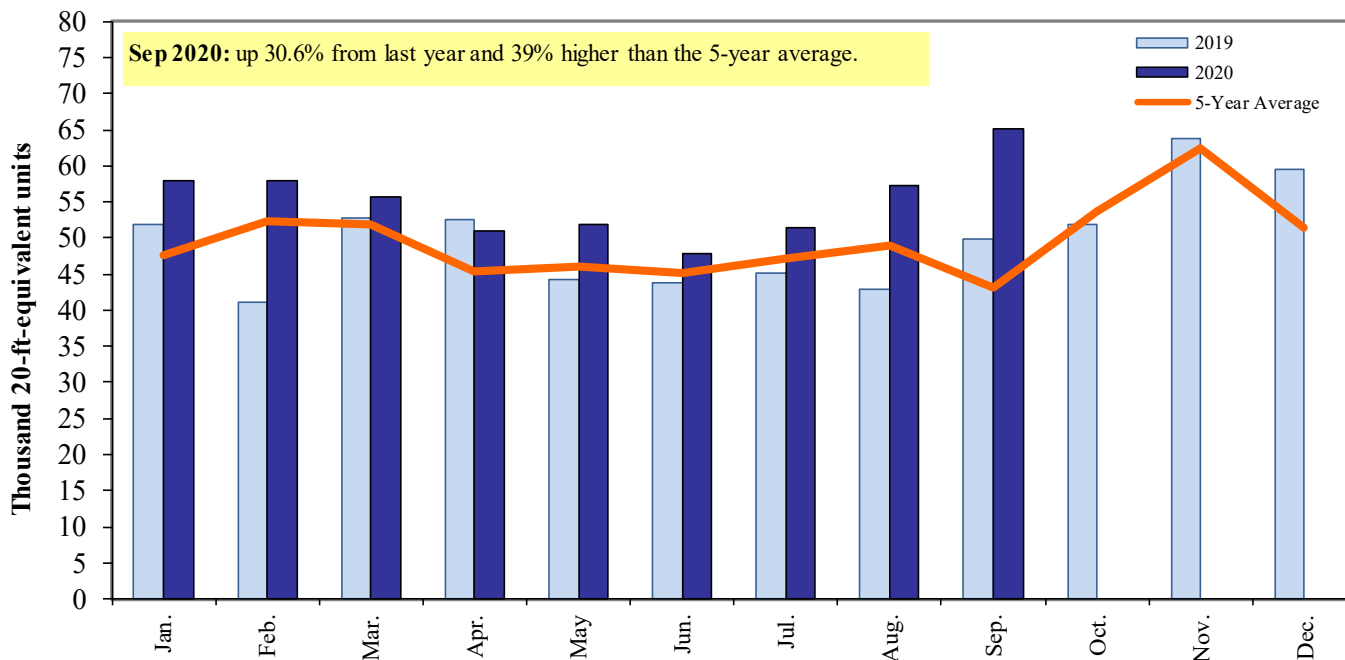
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



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

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

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