USDA United States Department of Agriculture

Grain Transportation Report

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

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February 4, 2021

Contents

The next release is February 11, 2021

WEEKLY HIGHLIGHTS

Export Sales of Corn, Wheat, and Soybeans to China Continue Rising

Large sales of soybean, corn, and wheat to China continue to drive grain transportation demand. By the week ending January 21, total commitments of soybeans to China for marketing year (MY) 2020/21 had reached 34.7 million metric tons (mmt), accounting for 60 percent of total U.S. soybean export sales and almost triple the amount the same time last year for MY 2019/20. Also, by the week ending January 21, total commitments of U.S. corn to China for MY 2020/21 were 11.8 mmt, versus just 0.061 mmt by the same time last year for MY 2019/20. Total commitments of U.S. wheat to China were 2.6 mmt by the week ending January 21, versus 0.194 mmt by the same time last year. For MY 2020/21, China has become the third largest importer of U.S. wheat behind Mexico and the Philippines.

STB Seeks Comments on Railroad Petition To Modify Revenue Adequacy Determination

In late December 2020, the Surface Transportation Board (STB) opened a proceeding to consider a petition by three Class I railroads. The railroads seek changes in STB's procedures for determining whether Class I rail carriers are revenue adequate. Currently, STB makes an annual determination by comparing a railroad's rate of return on net investment (ROI) to the industry cost of capital. The issue of determining revenue adequacy is central to STB's mission of balancing the interests of shippers and carriers. On the one hand, STB is charged with ensuring railroads earn sufficient revenue to attract investment and maintain their networks. On the other, STB must ensure shippers are protected from undue applications of market power and pay reasonable rates. Comments are due by March 1, 2021 and replies, by March 31, 2021.

Mississippi River Locks 27 and Arkansas River Lock 1 Close for Repair

The U.S. Army Corps of Engineers is closing the main chamber of the Mississippi River Chain of Rocks Lock and Dam (Locks No. 27, near Granite City, IL) from February 1 to February 18 for maintenance and repair. During this time, the auxiliary lock will open for traffic. Although February is usually fairly slow for grain movements on this part of the river, the industry expects some level of delays during the closure. Between 2016 to 2020, the average February total tonnage for grain movements through Locks 27 was 1.08 million tons, 4 percent of annual total tonnage through the Lock (***GTR* table 10**). The Corps also closed the Arkansas River Norrell Lock and Dam (Lock No. 1, near Tichnor, AR) to replace the lock interlock system between February 2 and February 6, 2021.

Snapshots by Sector

Export Sales

For the week ending January 21, **unshipped balances** of wheat, corn, and soybeans totaled 48.2 million metric tons (mmt). This was 3 percent lower from last week, but still represented a significant increase in outstanding sales from the same time last year. Net **corn export sales** were 1.850 mmt, up 29 percent from the past week. Net **soybean export sales** were 0.466 mmt, down 74 percent from the previous week. Net **wheat export sales** were 0.381 mmt, up 15 percent from the previous week.

Rail

U.S. Class I railroads originated 27,295 **grain carloads** during the week ending January 23. This was a 1-percent decrease from the previous week, 25 percent more than last year, and 23 percent more than the 3-year average.

Average February shuttle **secondary railcar** bids/offers (per car) were $99 above tariff for the week ending January 28. This was $289 less than last week and $236 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending January 30, **barge grain movements** totaled 1,027,650 tons. This was 7 percent lower than the previous week and 119 percent more than the same period last year.

For the week ending January 30, 618 grain barges **moved down river**—63 barges fewer than the previous week. There were 894 grain barges **unloaded in New Orleans**, 8 percent fewer than the previous week.

Ocean

For the week ending January 28, 37 **oceangoing grain vessels** were loaded in the Gulf—28 percent more than the same period last year. Within the next 10 days (starting January 29, 2021), 65 vessels were expected to be loaded—51 percent more than the same period last year.

As of January 28, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.50. This was 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was $26.75 per mt, 1 percent more than the previous week.

Fuel

For the week ending February 1, the U.S. average **diesel fuel price** increased 2.2 cents from the previous week to $2.738 per gallon, 21.8 cents below the same week last year.

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Web: **http://dx.doi.org/10.9752/TS056.02-04-2021**

Feature Article/Calendar

Fourth-Quarter Wheat Transportation Costs Down, but Landed Costs Increase

From third to fourth quarter 2020 (quarter to quarter), wheat shipping costs decreased from Kansas (KS) and North Dakota (ND) to Japan—both via the Pacific Northwest (PNW routes) and via the U.S. Gulf (Gulf routes) (tables 1, 2). From fourth quarter 2019 to fourth quarter 2020 (year to year), wheat shipping costs via the PNW and Gulf routes decreased moderately, by all modes. Year to year, wheat inspections increased 7 percent, but quarter to quarter, inspections decreased 15 percent (*Grain Transportation Report*, (*GTR*), January 14, 2021).

Transportation Costs

Fourth-quarter transportation costs for shipping wheat totaled $96/metric ton (mt) via the KS-PNW route and $91/mt via the ND-PNW route. Quarter to quarter, the costs were down roughly 1 percent for each PNW route, while ocean freight rates rose slightly (table 1). Year to year, wheat shipping costs fell 5 percent via the KS-PNW route and fell 4 percent via the ND-PNW route. Also, quarter to quarter, the cost to ship wheat was down more than 2 percent for each Gulf route (KS-Gulf and ND-Gulf). Year to year, costs through the Gulf decreased 7 percent from Kansas and 6 percent from North Dakota (table 2). Fourth-quarter wheat transportation costs as a share of the landed cost were 33 percent for each PNW route and 33-38 percent for the Gulf routes (tables 1 and 2).

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

	Kansas					North Dakota				
Mode	2019 4th qtr	2020 3rd qtr	2020 4th qtr	Year-to-year change	Quarterly change	2019 4th qtr	2020 3rd qtr	2020 4th qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	11.46	12.38	11.38	-0.70	-8.08	11.46	12.38	11.38	-0.70	-8.08
Rail[1]	62.77	60.76	60.81	-3.12	0.08	57.61	56.78	56.37	-2.15	-0.72
Ocean vessel	26.28	23.05	23.40	-10.96	1.52	26.28	23.05	23.40	-10.96	1.52
Transportation costs	100.51	96.19	95.59	-4.90	-0.62	95.35	92.21	91.15	-4.40	-1.15
Farm value[2]	142.57	158.37	193.39	35.65	22.11	152.00	161.06	186.66	22.80	15.89
Total landed cost	243.08	254.56	288.98	18.88	13.52	247.35	253.27	277.81	12.31	9.69
Transport % of landed cost	41.35	37.79	33.08			38.55	36.41	32.81		

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

	Kansas					North Dakota				
Mode	2019 4th qtr	2020 3rd qtr	2020 4th qtr	Year-to-year change	Quarterly change	2019 4th qtr	2020 3rd qtr	2020 4th qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	11.46	12.38	11.38	-0.70	-8.08	11.46	12.38	11.38	-0.70	-8.08
Rail[1]	43.31	42.48	42.07	-2.86	-0.97	60.57	59.95	59.23	-2.21	-1.19
Ocean vessel	48.25	42.99	42.11	-12.73	-2.05	48.25	42.99	42.11	-12.73	-2.05
Transportation costs	103.02	97.85	95.56	-7.24	-2.34	120.28	115.32	112.72	-6.28	-2.25
Farm value[2]	142.57	158.37	193.39	35.65	22.11	152.00	161.06	186.66	22.80	15.89
Total landed cost	245.59	256.22	288.95	17.66	12.77	272.28	276.38	299.38	9.95	8.32
Transport % of landed cost	41.95	38.19	33.07			44.18	41.73	37.65		

[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.

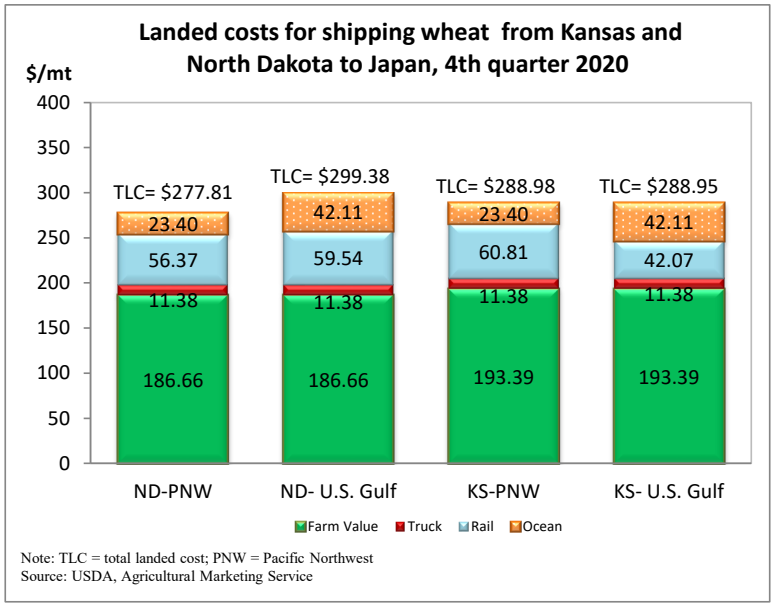
[2] USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter).
Note: PNW = Pacific Northwest; qtr = quarter
Source: USDA, Agricultural Marketing Service.

Total Landed Costs

With substantial rises in wheat farm values in both Kansas and North Dakota, total landed costs for shipping wheat increased for all routes, both from quarter to quarter and year to year. In all cases, rising farm values more than offset declines in transportation costs. Landed costs ranged from $278/mt to $299/mt (see figure). Quarter to quarter, landed costs rose for all routes—by 14 percent for KS-PNW, 10 percent for ND-PNW, 13 percent for KS-Gulf, and 8 percent for ND-Gulf. Landed costs also rose from year to year for all routes—by 19 percent for KS-PNW, 12 percent for ND-PNW, 18 percent for KS-Gulf, and 10 percent for ND-Gulf.

Ocean Freight Rates
Because of several periods of volatility in the bulk markets, ocean freight rates were up slightly in PNW, but down slightly in the Gulf (*GTR*, January 21, 2021).

Quarter to quarter, ocean freight rates for the PNW routes increased 2 percent, but from year to year, decreased 11 percent (table 1). Quarter to quarter, ocean freight rates for the Gulf routes decreased 2 percent and, year to year, decreased 13 percent.



Note: TLC = total landed cost; PNW = Pacific Northwest
Source: USDA, Agricultural Marketing Service

Rail Rates
Quarter to quarter, rail rates for shipping wheat via the KS-PNW route did not change, but rail rates for the ND-PNW route decreased 1 percent. Year to year, rail rates decreased 3 percent for the KS-PNW route and 2 percent for the ND-PNW route. Quarter to quarter, rail rates decreased 1 percent for each Gulf route, but year to year, decreased 3 percent for KS-Gulf and 2 percent for ND-Gulf. Slower demand for wheat in the fourth quarter forced each State's grain trucking rate down 8 percent from the third quarter, but the rate dropped only 1 percent from year to year.

Wheat Market Outlook
Fourth-quarter inspections of wheat destined to Japan reached .571 million metric tons (mmt) in 2020, according to the USDA's Federal Grain Inspection Service (FGIS). Year to year, fourth-quarter wheat exports to Japan decreased 22 percent. In fourth quarter 2020, the share of wheat exports to Japan accounted for 12 percent of the total U.S. wheat exports. For the whole year 2020, annual exports of U.S. wheat to Japan totaled 2.6 mmt, 9 percent of total U.S. wheat exports. This total was up 4 percent from 2019.

In 2020, total U.S. wheat inspected for export reached 29 mmt, up 4 percent from 2019, reflecting a steady demand from Africa and Asia, according to FGIS. According to USDA's January *World Agricultural Supply and Demand Estimates*, wheat exports for marketing year (MY) 2020/21 are projected to increase 2 percent from MY 2019/20. *Johnny.Hill@usda.gov*

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit train	Shuttle		Gulf	Pacific
02/03/21	184	308	223	233	208	190
01/27/21	182	306	234	219	207	188

[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)

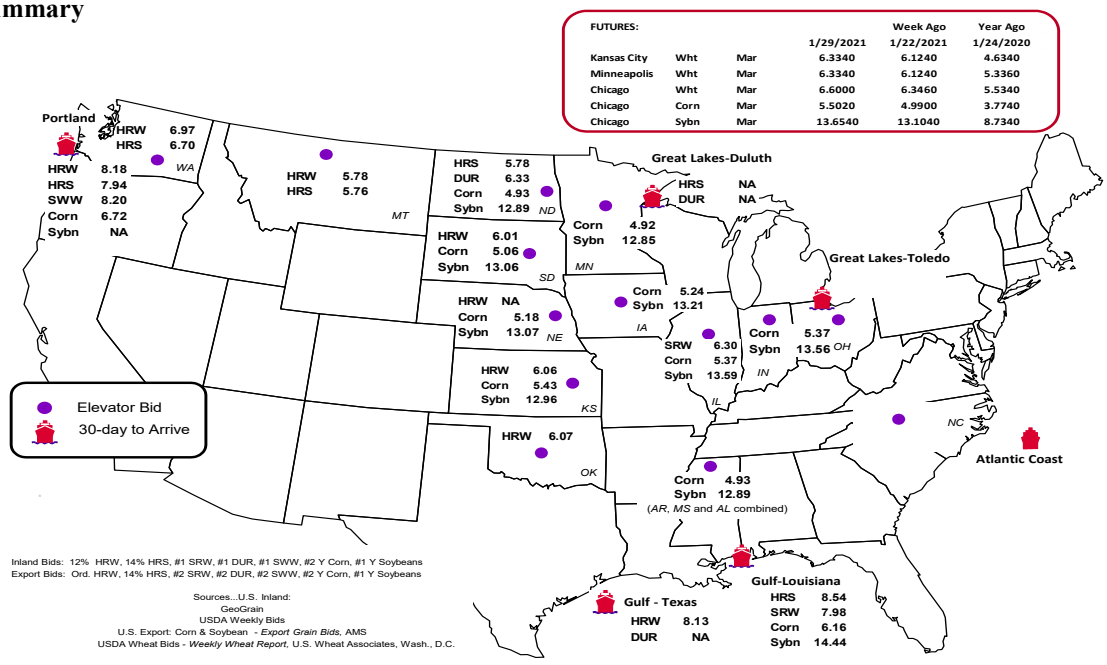
Commodity	Origin–destination	1/29/2021	1/22/2021
Corn	IL–Gulf	-0.79	-0.85
Corn	NE–Gulf	-0.98	-1.04
Soybean	IA–Gulf	-1.23	-1.31
HRW	KS–Gulf	-2.07	-2.08
HRS	ND–Portland	-2.16	-2.26

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]
1/27/2021[p]	2,131	1,517	7,603	990	12,241	1/23/2021	2,457
1/20/2021[r]	2,747	2,650	7,190	868	13,455	1/16/2021	3,005
2021 YTD[r]	8,251	8,539	28,944	4,021	49,755	2021 YTD	9,127
2020 YTD[r]	1,915	2,595	13,739	853	19,102	2020 YTD	9,275
2021 YTD as % of 2020 YTD	431	329	211	471	260	% change YTD	98
Last 4 weeks as % of 2020[2]	337	345	208	642	255	Last 4wks. % 2020	103
Last 4 weeks as % of 4-year avg.[2]	315	178	135	224	162	Last 4wks. % 4 yr.	111
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	126,407
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622

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

[2] Compared with same 4-weeks in 2020 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.

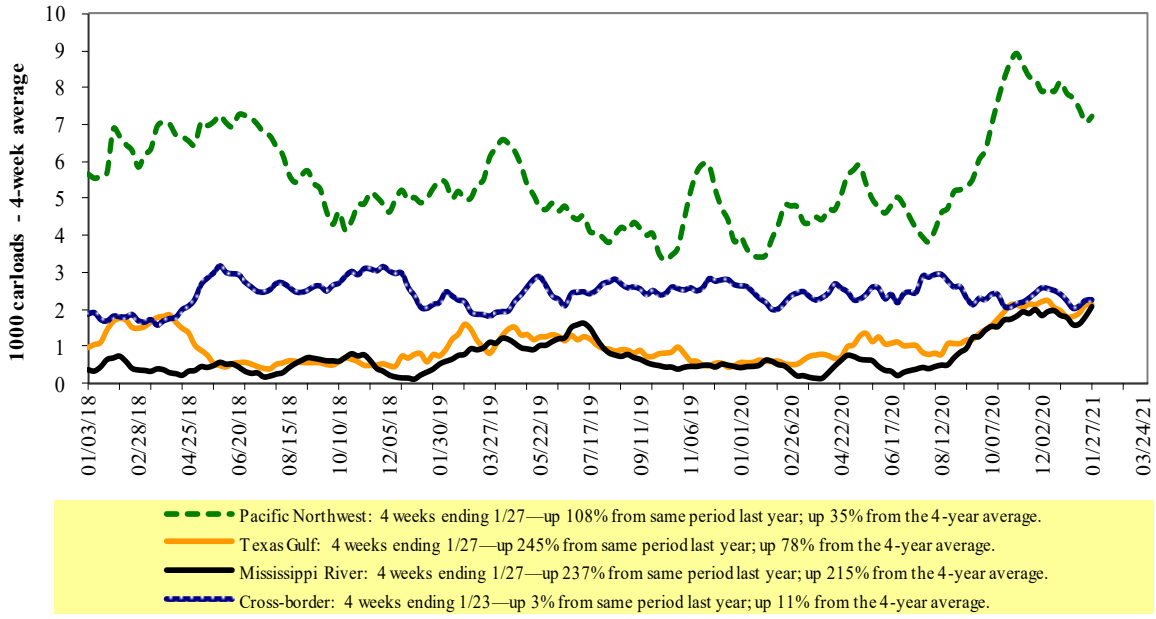
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
1/23/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,606	2,900	14,587	1,031	6,171	27,295	6,200	5,135
This week last year	1,839	2,430	11,558	1,113	4,874	21,814	3,416	3,863
2021 YTD	7,051	9,323	41,685	3,361	21,138	82,558	16,301	15,391
2020 YTD	7,058	9,698	40,834	4,266	17,170	79,026	13,874	13,883
2021 YTD as % of 2020 YTD	100	96	102	79	123	104	117	111
Last 4 weeks as % of 2020*	128	120	133	102	163	136	155	147
Last 4 weeks as % of 3-yr. avg.**	126	116	127	110	147	129	152	131
Total 2020	91,659	130,940	613,630	57,782	296,701	1,190,712	239,162	261,778

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

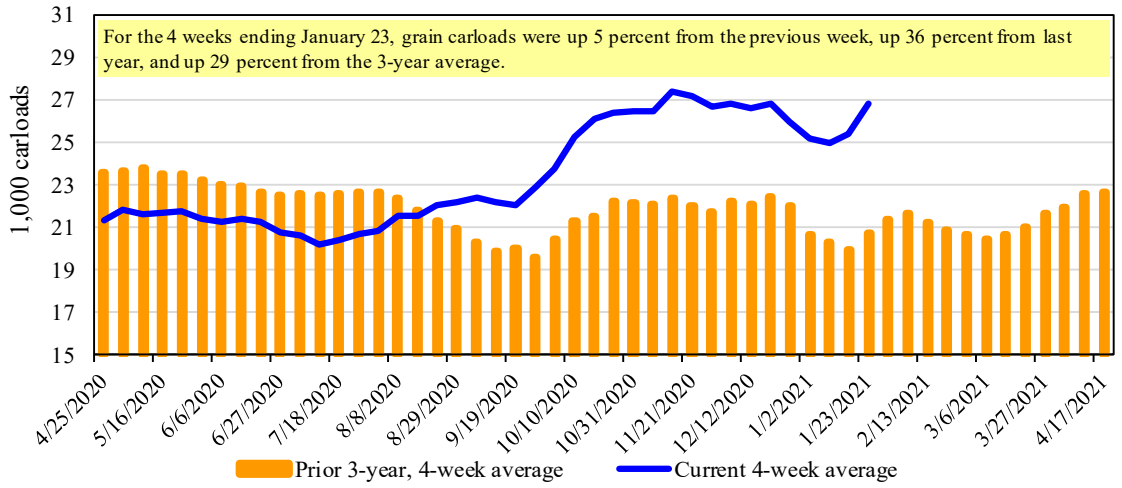
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
1/28/2021		Feb-21	Feb-20	Mar-21	Mar-20	Apr-21	Apr-20	May-21	May-20
BNSF[3]	COT grain units	0	0	0	0	no bids	no bid	no bids	no bid
	COT grain single-car	26	32	17	0	0	0	0	0
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no bid	n/a	n/a

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

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

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

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

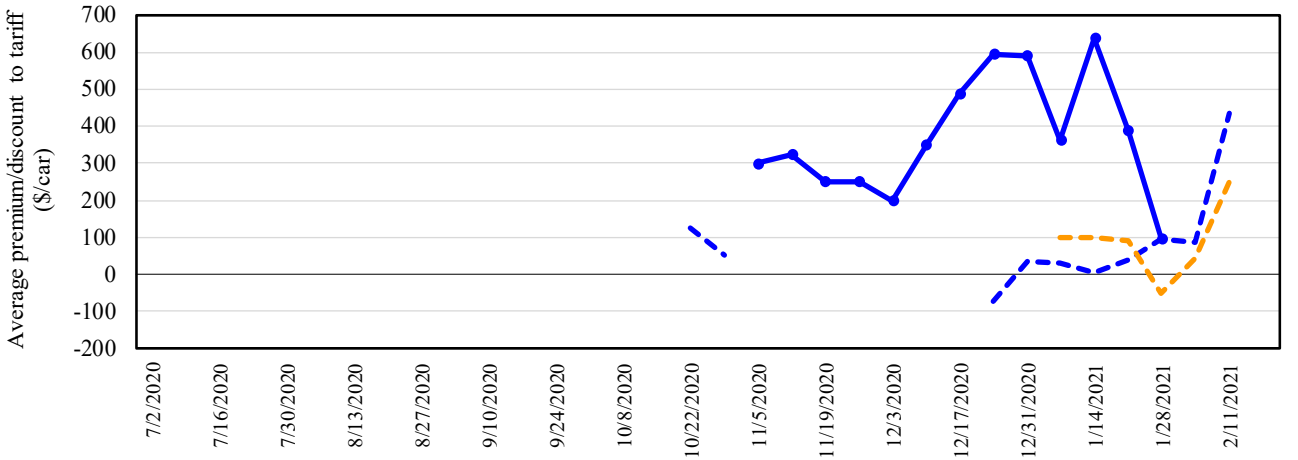
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

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

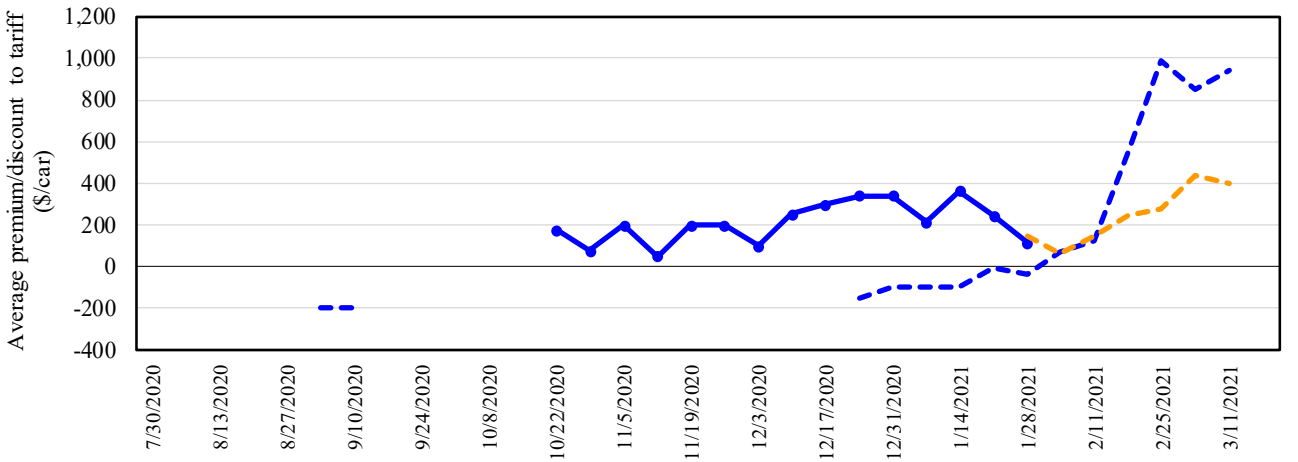


1/28/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$113	$85

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $289 this week and are $539 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 March 2021, secondary market



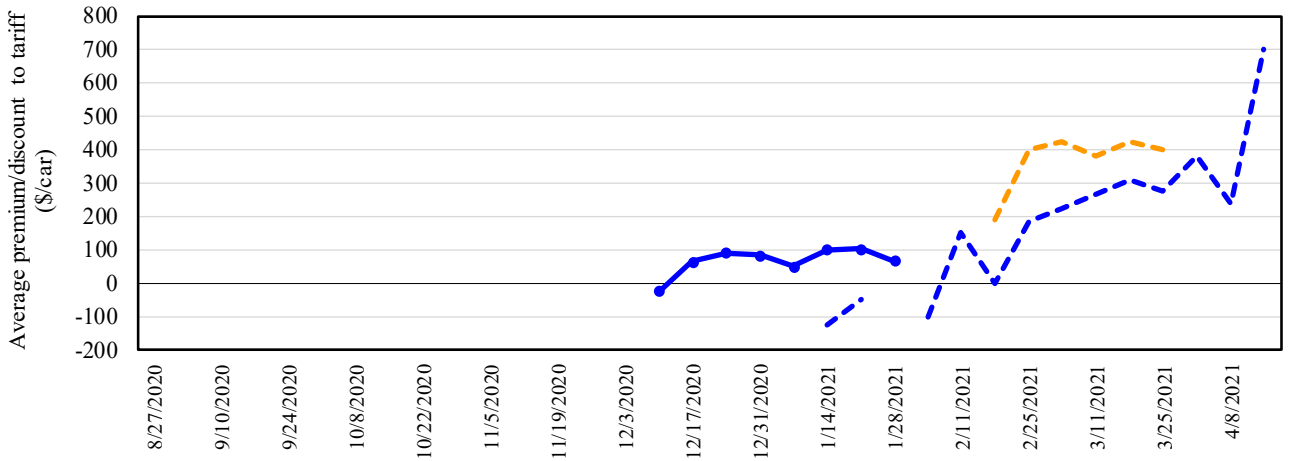
1/28/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$156	$75

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $128 this week and are $247 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 April 2021, secondary market



1/28/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$33	$100

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $35 this week and are $35 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: 1/28/2021	Delivery period					
		Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-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 2020	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 2020	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**113**	**156**	**33**	**(75)**	**n/a**	**(150)**
	Change from last week	(312)	(144)	(130)	(31)	n/a	(75)
	Change from same week 2020	263	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**85**	**75**	**100**	**n/a**	**n/a**	**(75)**
	Change from last week	(265)	(113)	58	n/a	n/a	0
	Change from same week 2020	210	250	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]

February 2021	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	$51	$40.06	$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	$89	$45.82	$1.25	-2
	Sioux Falls, SD	Galveston-Houston, TX	$6,851	$0	$68.03	$1.85	-2
	Colby, KS	Galveston-Houston, TX	$4,801	$98	$48.64	$1.32	-2
	Amarillo, TX	Los Angeles, CA	$5,121	$136	$52.20	$1.42	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$101	$39.73	$1.01	-2
	Toledo, OH	Raleigh, NC	$7,833	$0	$77.79	$1.98	15
	Des Moines, IA	Davenport, IA	$2,455	$21	$24.59	$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	$63	$39.35	$1.00	1
	Des Moines, IA	Los Angeles, CA	$5,780	$182	$59.21	$1.50	-1
Soybeans	Minneapolis, MN	New Orleans, LA	$5,246	$74	$52.83	$1.44	39
	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	$101	$47.13	$1.28	-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	$160	$61.29	$1.67	-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	$101	$38.93	$0.99	-3
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,320	$79	$43.68	$1.11	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	$116	$49.56	$1.35	-2
	Toledo, OH	Huntsville, AL	$4,945	$0	$49.11	$1.34	3
	Grand Island, NE	Portland, OR	$5,260	$164	$53.86	$1.47	-3

[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: February 2021							
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	$70	$69.30	$1.88	-2
	KS	Guadalajara, JA	$7,471	$519	$81.64	$2.22	-2
	TX	Salinas Victoria, NL	$4,347	$43	$44.85	$1.22	-1
Corn	IA	Guadalajara, JA	$8,902	$421	$95.26	$2.42	-1
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,300	$145	$86.29	$2.19	-1
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,665	$142	$79.76	$2.02	-1
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$397	$91.38	$2.48	-1
	NE	Guadalajara, JA	$9,157	$408	$97.73	$2.66	-1
	IA	El Castillo, JA	$9,410	$0	$96.15	$2.61	-1
	KS	Torreon, CU	$8,014	$272	$84.66	$2.30	-1
Sorghum	NE	Celaya, GJ	$7,772	$364	$83.14	$2.11	-1
	KS	Queretaro, QA	$8,108	$87	$83.73	$2.12	-1
	NE	Salinas Victoria, NL	$6,713	$70	$69.30	$1.76	-1
	NE	Torreon, CU	$7,092	$242	$74.94	$1.90	-2

[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.

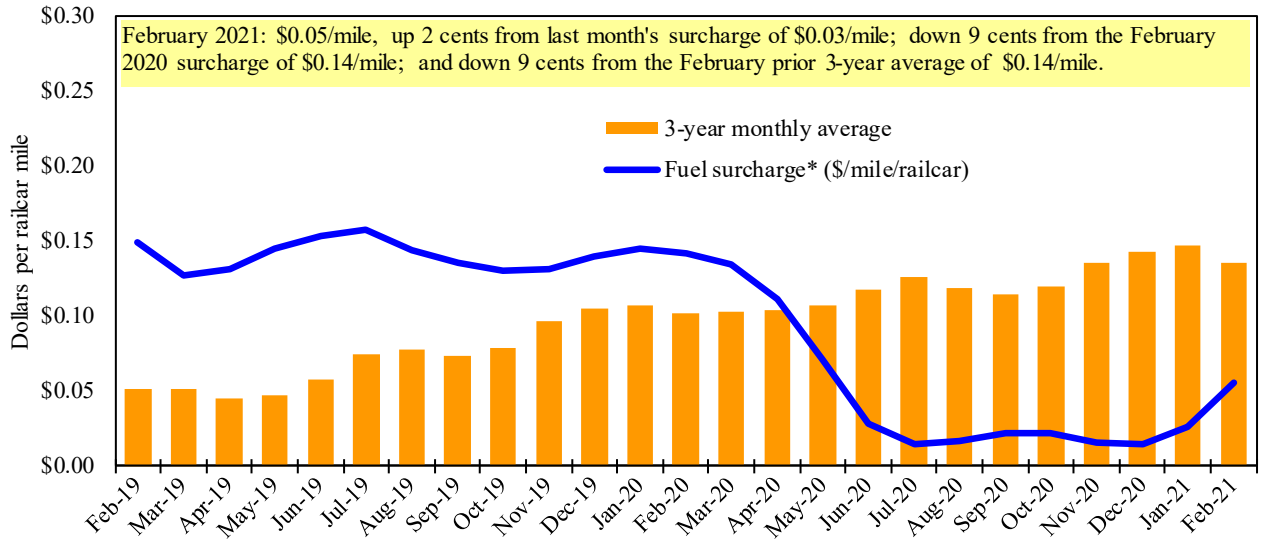
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

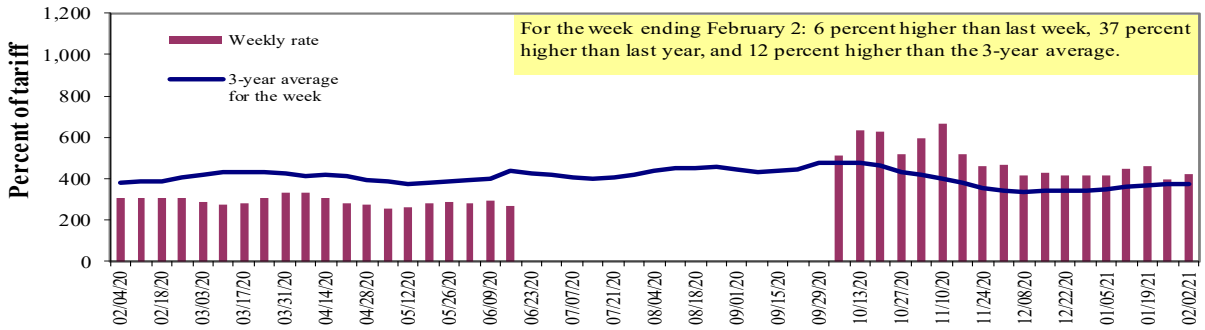
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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

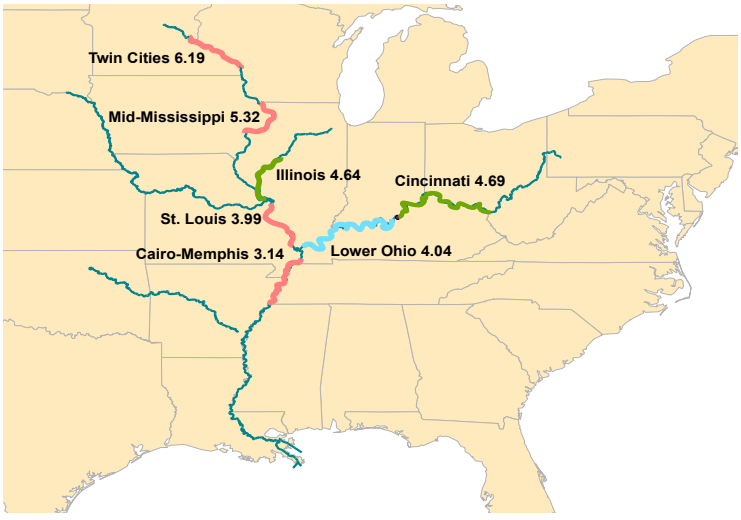
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	2/2/2021	-	-	420	295	323	323	260
	1/26/2021	-	-	395	283	329	329	255
$/ton	2/2/2021	-	-	19.49	11.77	15.15	13.05	8.16
	1/26/2021	-	-	18.33	11.29	15.43	13.29	8.01
Current week % change from the same week:								
	Last year	-	-	37	45	40	40	31
	3-year avg. [2]	-	-	12	4	3	2	3
Rate[1]	March	-	-	391	283	295	295	248
	May	483	385	348	268	277	277	234

[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

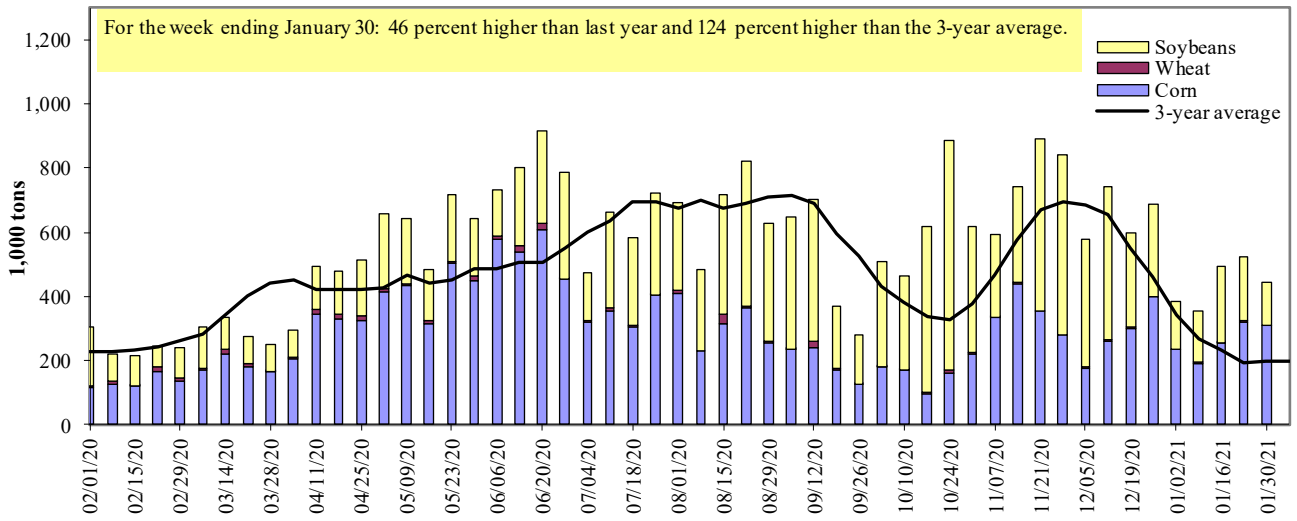
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 01/30/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	288	0	128	9	425
Granite City, IL (L27)	308	0	136	9	453
Illinois River (La Grange)	240	0	120	9	368
Ohio River (Olmsted)	319	2	188	0	509
Arkansas River (L1)	0	7	59	0	66
Weekly total - 2021	627	9	383	9	1,028
Weekly total - 2020	209	18	237	6	470
2021 YTD[1]	2,021	52	1,571	61	3,704
2020 YTD[1]	841	81	1,167	6	2,094
2021 as % of 2020 YTD	240	64	135	1,085	177
Last 4 weeks as % of 2020[2]	225	70	138	1,085	175
Total 2020	18,942	1,765	19,205	237	40,149

[1] Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

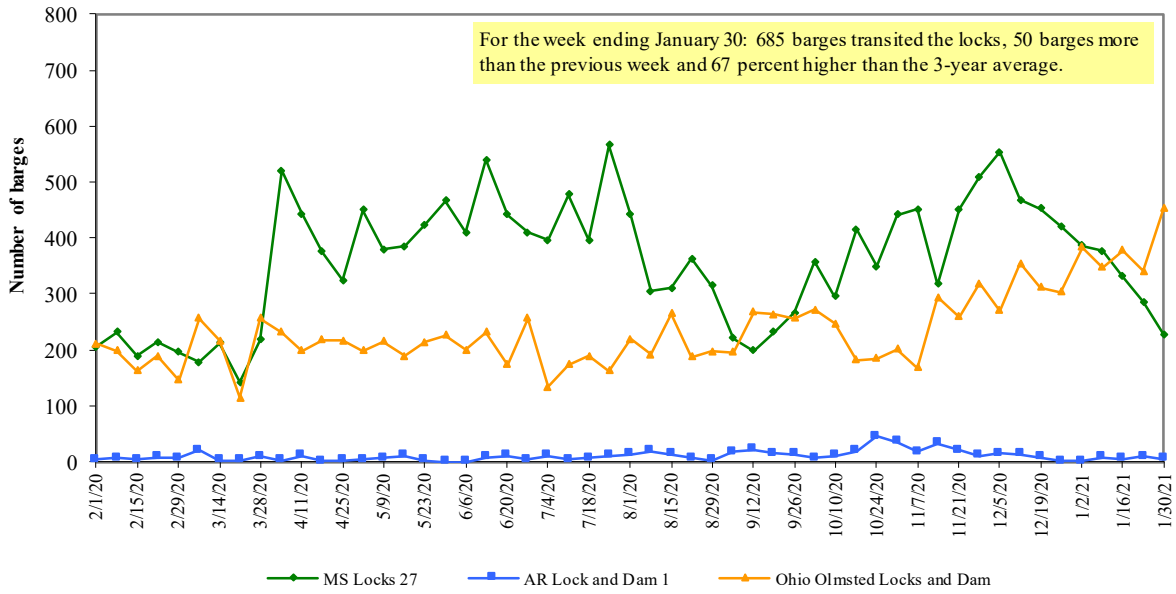
[2] As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

Source: U.S. Army Corps of Engineers.

Figure 11

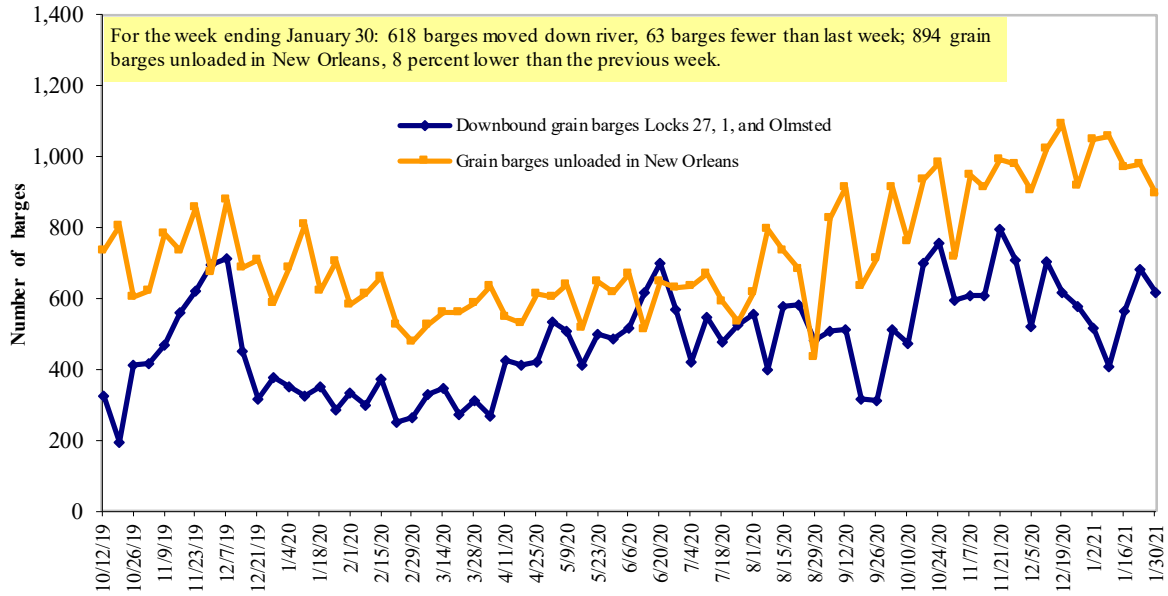
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 2/1/2021 (U.S. $/gallon)

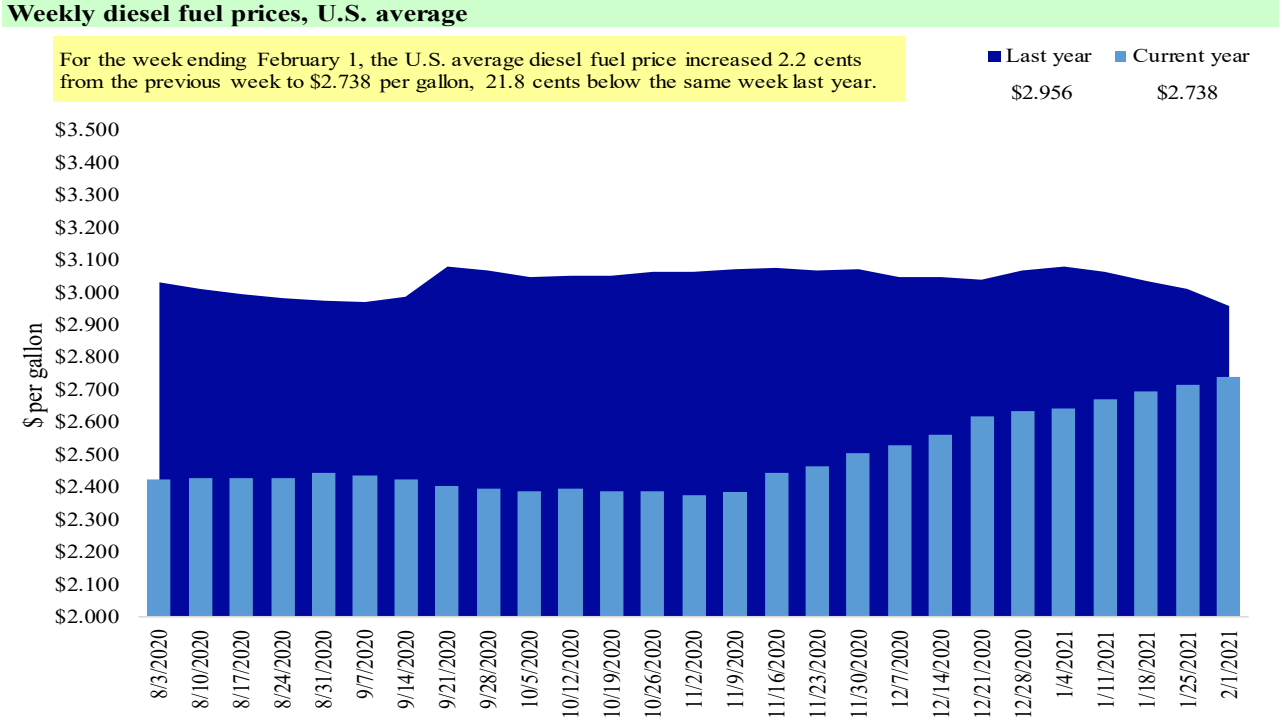
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.791	0.028	-0.212
	New England	2.796	0.015	-0.309
	Central Atlantic	2.964	0.022	-0.216
	Lower Atlantic	2.675	0.033	-0.188
II	Midwest	2.676	0.020	-0.163
III	Gulf Coast	2.500	0.017	-0.210
IV	Rocky Mountain	2.641	0.028	-0.303
V	West Coast	3.199	0.023	-0.318
	West Coast less California	2.841	0.025	-0.305
	California	3.497	0.020	-0.315
Total	United States	2.738	0.022	-0.218

[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]									
1/21/2021	1,356	443	1,894	2,398	168	6,260	29,649	12,271	48,180
This week year ago	1,825	409	1,590	1,210	190	5,224	11,035	6,216	22,474
Cumulative exports-marketing year[2]									
2020/21 YTD	6,001	1,157	4,513	3,350	490	15,511	19,021	45,562	80,094
2019/20 YTD	5,902	1,735	4,428	3,016	624	15,704	10,508	25,388	51,600
YTD 2020/21 as % of 2019/20	102	67	102	111	79	99	181	179	155
Last 4 wks. as % of same period 2019/20*	77	117	116	205	71	122	263	227	220
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; 2020/21 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 1/21/2021	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	10,681	9,521	12	14,869
Japan	7,043	3,689	91	11,221
Columbia	2,426	2,041	19	4,830
Korea	1,205	79	1,428	4,011
China	11,845	61	19,286	909
Top 5 importers	**33,199**	**15,391**	**116**	**35,840**
Total U.S. corn export sales	**48,670**	**21,543**	**126**	**49,983**
% of projected exports	75%	48%		
Change from prior week[2]	**1,850**	**1,235**		
Top 5 importers' share of U.S. corn export sales	68%	71%		72%
USDA forecast January 2021	**64,885**	**45,242**	**43**	
Corn use for ethanol USDA forecast, January 2021	**125,730**	**123,241**	**2**	

[1] Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; 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 1/21/2021	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	34,734	11,975	190	19,106
Mexico	3,841	3,182	21	4,591
Egypt	2,040	1,575	30	2,980
Indonesia	1,374	1,031	33	2,360
Japan	1,363	1,447	(6)	2,288
Top 5 importers	**43,352**	**19,210**	**126**	**31,324**
Total U.S. soybean export sales	**57,834**	**31,604**	**83**	**49,352**
% of projected exports	95%	69%		
change from prior week[2]	**466**	**401**		
Top 5 importers' share of U.S. soybean export sales	75%	61%		**63%**
USDA forecast, January 2021	**60,763**	**45,831**	**133**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; 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 1/21/2021	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	2,871	2,957	(3)	3,213
Philippines	2,702	2,603	4	2,888
Japan	2,077	2,140	(3)	2,655
Nigeria	1,041	1,130	(8)	1,433
Korea	1,473	1,124	31	1,372
Indonesia	915	746	23	1,195
Taiwan	942	1,056	(11)	1,175
Thailand	701	757	(7)	727
Italy	545	708	(23)	622
Colombia	302	575	(48)	618
Top 10 importers	**13,567**	**13,795**	(2)	**15,897**
Total U.S. wheat export sales	**21,771**	**20,927**	4	**23,821**
% of projected exports	81%	80%		
change from prior week[2]	**381**	**646**		
Top 10 importers' share of U.S. wheat export sales	62%	66%		67%
USDA forecast, January 2021	**26,839**	**26,294**	2	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2019/20; 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 01/28/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	330	311	106	1,023	1,345	76	86	102	15,966
Corn	242	411	59	1,090	66	n/a	n/a	169	9,969
Soybeans	502	491	102	1,997	1,221	164	198	192	14,028
Total	**1,074**	**1,213**	**88**	**4,111**	**2,632**	**156**	**182**	**153**	**39,963**
Mississippi Gulf									
Wheat	59	93	63	186	286	65	84	53	3,422
Corn	659	786	84	2,952	1,904	155	195	167	28,781
Soybeans	997	1,297	77	4,924	4,070	121	148	163	38,013
Total	**1,715**	**2,177**	**79**	**8,062**	**6,261**	**129**	**159**	**157**	**70,215**
Texas Gulf									
Wheat	0	139	0	235	409	58	85	80	4,248
Corn	31	11	294	41	74	56	80	107	723
Soybeans	60	157	38	490	0	n/a	n/a	n/a	2,098
Total	**91**	**307**	**30**	**766**	**483**	**159**	**233**	**229**	**7,068**
Interior									
Wheat	26	46	56	154	173	89	105	116	2,263
Corn	153	170	90	610	584	104	134	123	8,683
Soybeans	151	186	81	654	714	92	104	126	7,274
Total	**330**	**402**	**82**	**1,418**	**1,470**	**96**	**115**	**123**	**18,220**
Great Lakes									
Wheat	4	12	31	16	1	n/a	n/a	114	891
Corn	0	0	n/a	0	0	n/a	n/a	n/a	111
Soybeans	0	0	n/a	0	0	n/a	n/a	0	1,111
Total	**4**	**12**	**31**	**16**	**1**	**n/a**	**n/a**	**82**	**2,113**
Atlantic									
Wheat	0	0	n/a	0	0	n/a	n/a	n/a	65
Corn	0	0	n/a	0	0	n/a	n/a	0	33
Soybeans	122	82	148	382	133	288	456	274	1,870
Total	**122**	**82**	**148**	**382**	**133**	**288**	**456**	**265**	**1,968**
U.S. total from ports*									
Wheat	418	602	69	1,615	2,214	73	88	90	26,854
Corn	1,085	1,378	79	4,693	2,628	179	225	159	48,301
Soybeans	1,832	2,214	83	8,447	6,138	138	167	178	64,394
Total	**3,335**	**4,194**	**80**	**14,755**	**10,979**	**134**	**165**	**156**	**139,548**

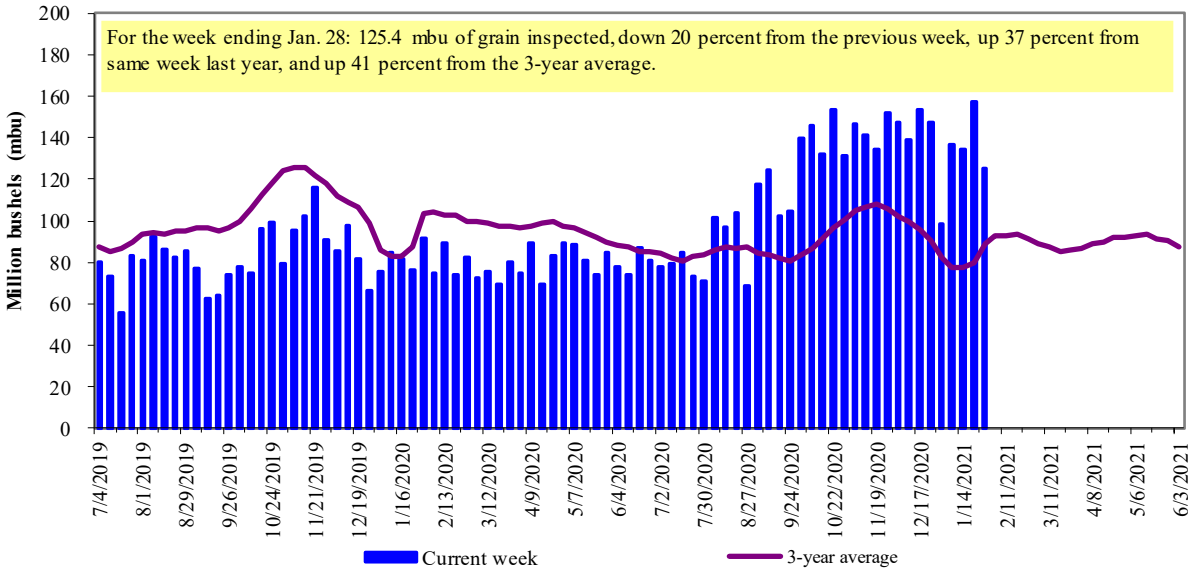
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

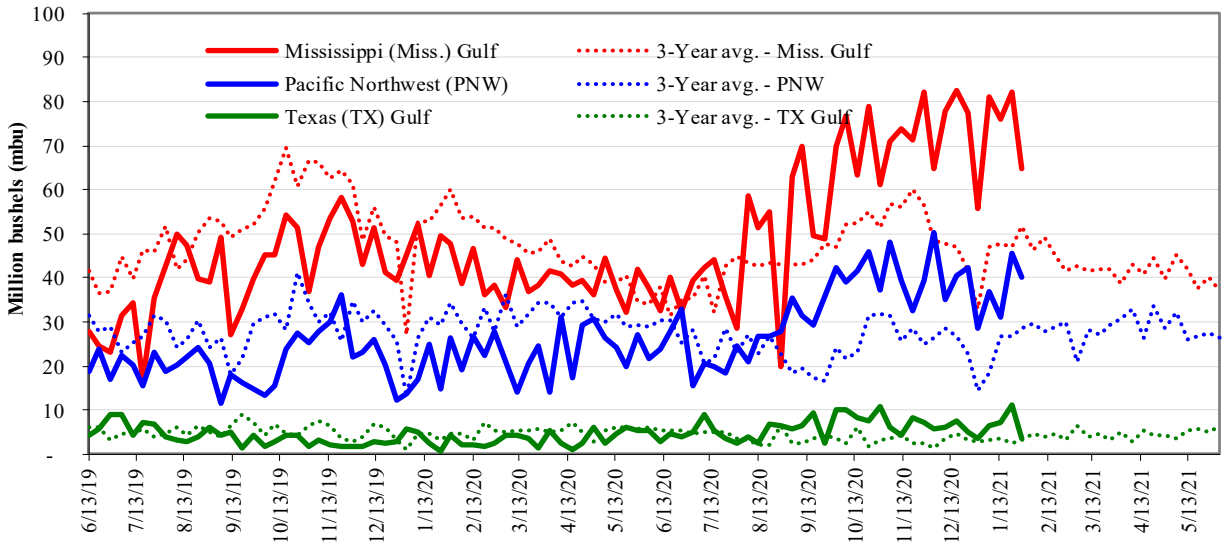


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 01/28/21 inspections (mbu):	
MS Gulf:	64.7
PNW:	40.1
TX Gulf:	3.4

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 21	down 70	down 27	down 12
Last Year (same wk):	up 35	down 17	up 31	up 51
3-yr avg. (4-wk. mov. Avg):	up 34	up 10	up 32	up 59

Source: USDA, Federal Grain Inspection Service.

Table 17

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

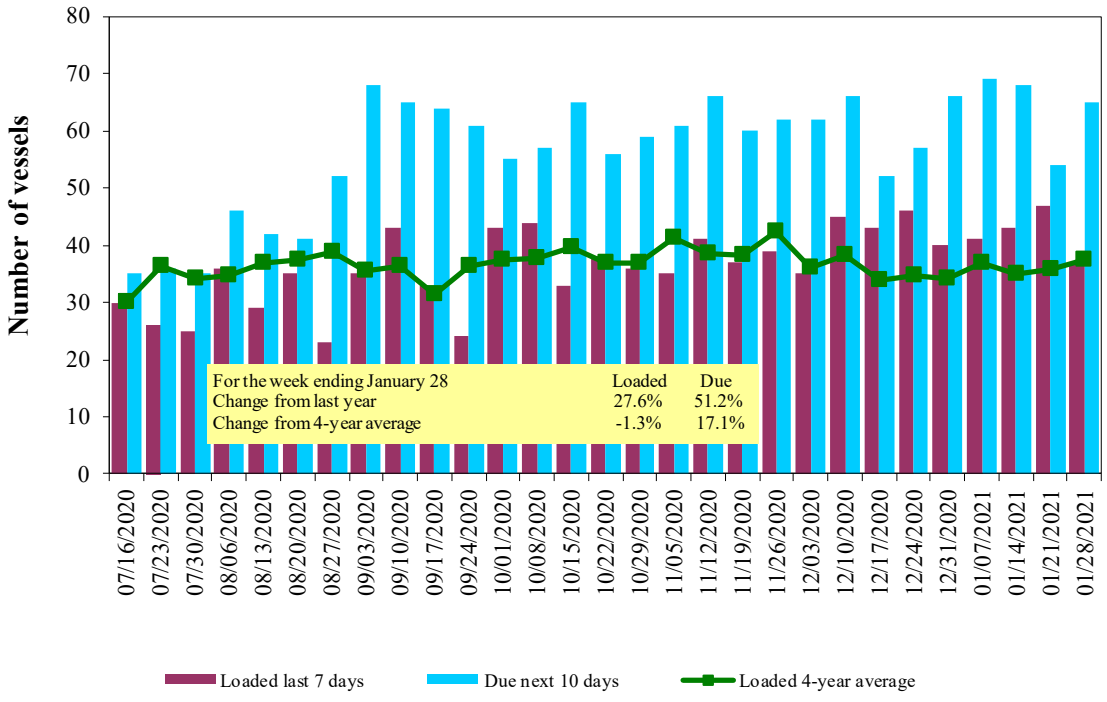
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
1/28/2021	37	37	65	18
1/21/2021	47	47	54	18
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

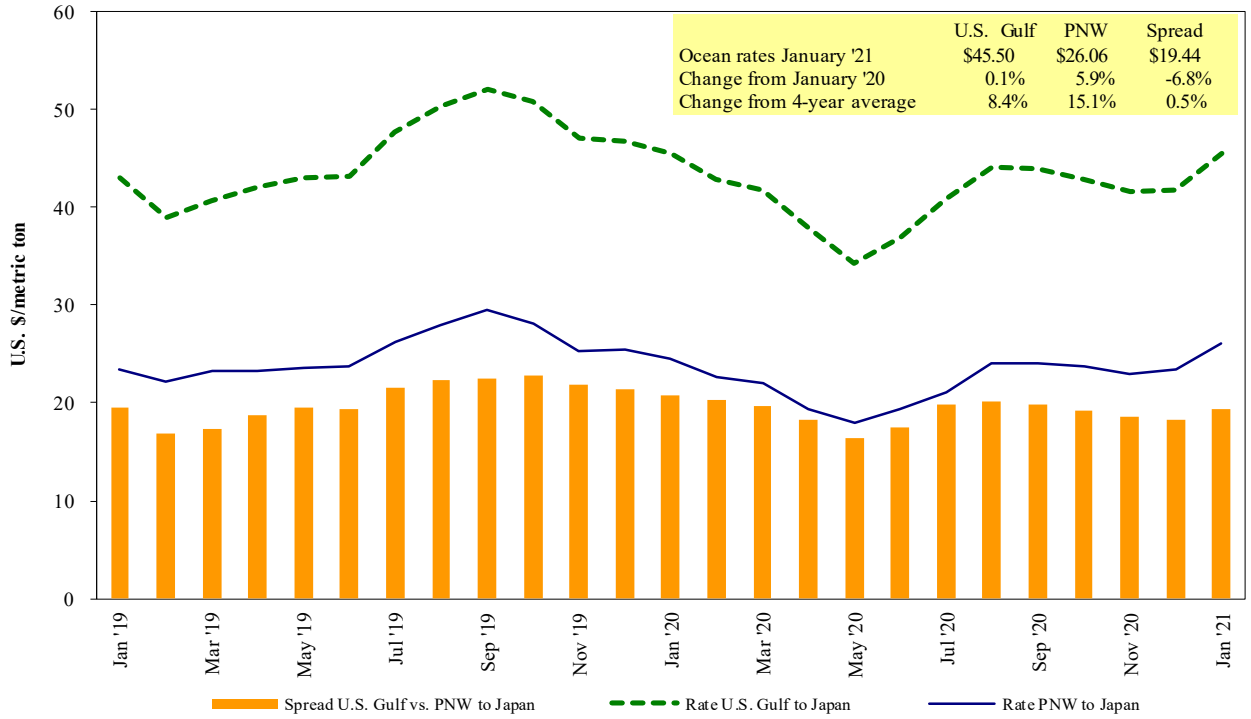
U.S. Gulf[1] vessel loading activity



[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 01/30/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Apr 1/30	48,000	46.75
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	Djibouti	Wheat	Oct 16/26	12,180	94.48*
U.S. Gulf	Vietnam	Corn	Feb 5/15	70,000	47.25
PNW	Taiwan	Wheat	Feb 18/Mar 4	40,925	35.24*
PNW	Taiwan	Corn	Feb 20/Mar 15	65,000	24.90
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*
Ukraine	China	Corn	Feb 10/17	60,000	36.40 op 38.90
Vancouver	Japan	Wheat	Sep 15/30	20,000	24.30
Vancouver	Japan	Canola	Sep 15/30	30,000	24.30
Brazil	Japan	Corn	Sep 11/20	49,000	34.75
Brazil	Japan	Corn	Sep 1/10	60,000	34.00

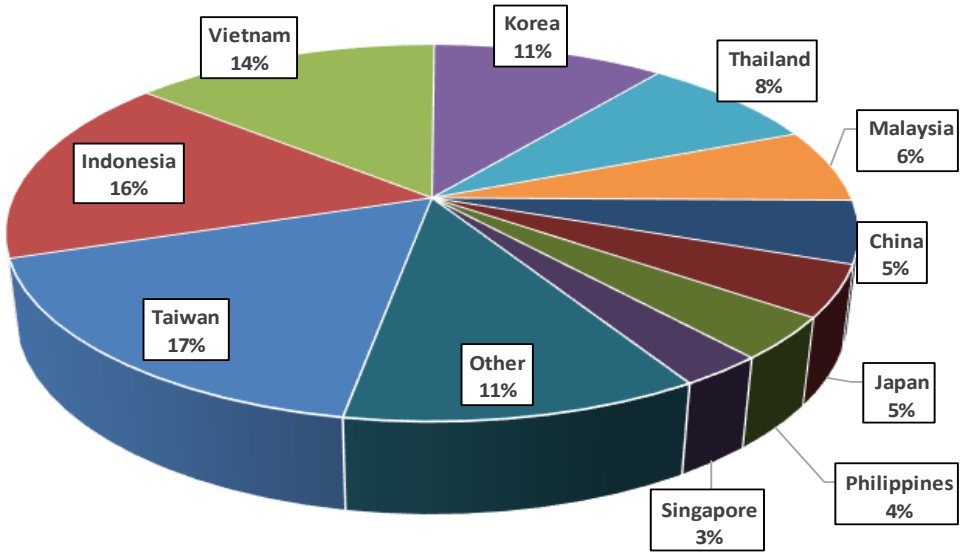
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

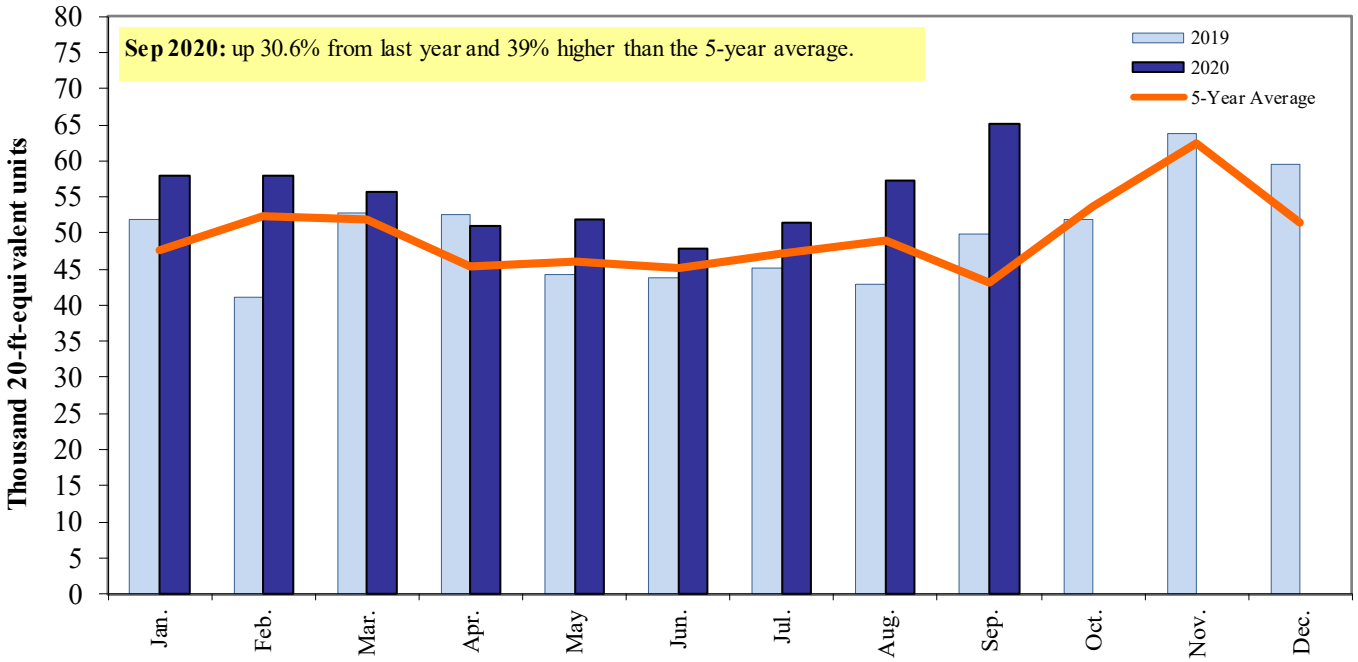
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



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

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

Figure 19
Monthly shipments of containerized grain to Asia



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

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

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