United States Department of Agriculture

Grain Transportation Report

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

Contact Us

April 8, 2021

Contents

The next release is April 15, 2021

WEEKLY HIGHLIGHTS

DOT Announces Funding Opportunity for Port Infrastructure

The U.S. Department of Transportation's (DOT) Maritime Administration announced a notice of funding opportunity for port and intermodal infrastructure-related projects through the Port Infrastructure Development Program. A total of $230 million in grant funding is available, with $205 million reserved for grants to coastal seaports and Great Lakes ports. The minimum award size is $1 million. Generally, the Federal cost-share does not exceed 80 percent, though it may be higher for certain categories of projects. Grants are awarded on a competitive basis for projects that strengthen and modernize port infrastructure and support the Nation's long-term economic vitality. DOT will host a series of webinars to provide technical assistance during the grant application process. The deadline to submit an application is July 30, 2021, and more information can be found here.

FHWA Awards 18.7 Million in STSFA Grants

The U.S. Department of Transportation's (DOT) Federal Highway Administration (FHWA) has awarded $18.7 million in Surface Transportation System Funding Alternatives (STSFA) grants to eight projects to explore new user-based funding methods for highways and bridges. The program helps States explore innovative new ways to finance the Highway Trust Fund in the long term. Led by six State DOTs and two transportation coalitions, the STSFA pilot projects allow States to learn about alternative new user fees structures. The new structures can complement traditional funding sources to build and improve the Nation's highway and bridge infrastructure. The full list of grant recipients can be viewed here.

ATRI Invites Motor Carriers To Participate in Insurance Cost Data Collection

The American Transportation Research Institute (ATRI) is asking motor carriers to participate in a survey about the rising costs of trucking insurance and its impact on overall operational costs by Friday, April 23, 2021. Via the online data collection form, participants can convey changes in their deductibles, what insurance they purchase beyond minimum requirements, and ways drivers and fleets weigh insurance costs against rising risk levels. The research will complement ATRI's annual Operational Costs of Trucking survey, providing more detailed information on one of the industry's most unpredictable cost categories.

Snapshots by Sector

Export Sales

For the week ending March 25, **unshipped balances** of wheat, corn, and soybeans totaled 43.3 mmt. This was 3 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 0.797 mmt, down 82 percent from the past week. Net **soybean export sales** were 0.106 mmt, down 4 percent from the previous week. Net **wheat export sales** were 0.250 mmt, down 27 percent from the previous week.

Rail

U.S. Class I railroads originated 24,532 **grain carloads** during the week ending March 27. This was a 10-percent decrease from the previous week, 10 percent more than last year, and 8 percent more than the 3-year average.

Average April shuttle **secondary railcar** bids/offers (per car) were $204 above tariff for the week ending April 1. This was $186 more than last week and $248 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending April 3, **barge grain movements** totaled 776,008 tons. This was 9 percent lower than the previous week and 51 percent higher than the same period last year.

For the week ending April 3, 497 grain barges **moved down river**—29 barges fewer than the previous week. There were 699 grain barges **unloaded in New Orleans**, 12 percent more than the previous week.

Ocean

For the week ending April 1, 38 **oceangoing grain vessels** were loaded in the Gulf—41 percent more than the same period last year. Within the next 10 days (starting April 2, 2021), 45 vessels were expected to be loaded—5 percent more than the same period last year.

As of April 1, the rate for shipping a metric ton of grain from the U.S. Gulf to Japan was $61.50. This was unchanged from the previous week. The rate from the Pacific Northwest to Japan was $36.00 per metric ton, unchanged from the previous week.

Fuel

For the week ending April 5, the U.S. average **diesel fuel price** decreased 1.7 cents from the previous week to $3.144 per gallon, 59.6 cents above the same week last year.

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Feature Article/Calendar

First-Quarter 2021 Grain Inspections Rebound From a Year Ago

Inspections of grain from all U.S. ports increased 50 percent from first quarter 2020 to first quarter 2021 (year to year), to a record 40 million metric tons (mmt), according to USDA's Federal Grain Inspection Service (FGIS) (fig. 1). Higher corn and soybean inspections drove the year-to-year increase in total grain inspections. Also, total inspections in each of the major export regions increased from year to year. First-quarter 2021 inspections marked a 31-percent increase from the 5-year average. Overall, grain inspections increased mainly because of rising demand from Asia and Latin America.

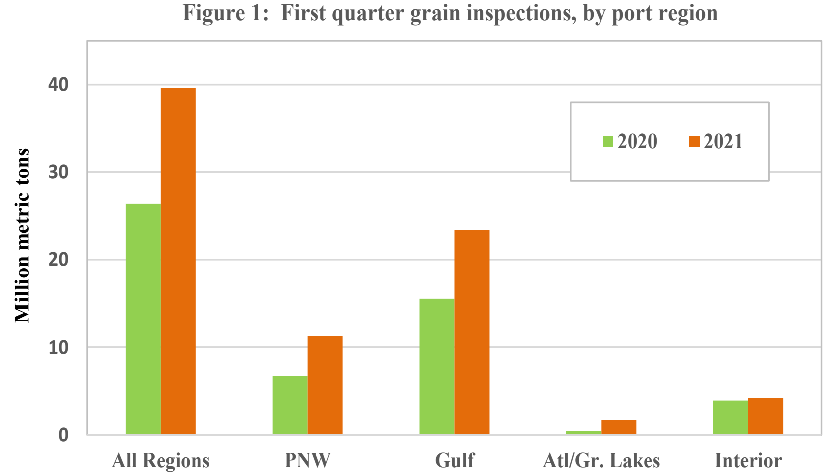
Breakdowns by Region

U.S. Gulf. At 23 mmt, first-quarter 2021 grain inspections at U.S. Gulf ports were up 34 percent from the 5-year average and up 51 percent year to year (fig. 1). Also, U.S. Gulf corn inspections were up 97 percent, and soybean inspections were up 52 percent.[1] Total U.S. Gulf wheat inspections decreased 53 percent, as a result of sizeable drops in shipments to Africa and Latin America. These drop-offs were due likely to stiff competition from Russian and Canadian wheat in the last few years.

The rise in grain inspections is also reflected in first-quarter rail deliveries of grain to U.S. ports, which increased 89 percent (***GTR* table 3**). Barge movements of grain to the U.S. Gulf through the locking sections of the Mississippi, Ohio, and Arkansas Rivers were also up significantly (***GTR* table 10**).

PNW. At 11 mmt, first-quarter grain inspections in PNW ports were up 25 percent from the 5-year average and up 67 percent year to year (see fig. 1). Higher PNW inspections were also reflected in a 49-percent rise in first-quarter rail deliveries of grain to PNW ports (***GTR* table 3**). PNW corn inspections increased over 194 percent, and soybean increased over 89 percent, because of higher demand from Asia. PNW first-quarter wheat inspections, however, were unchanged.

Figure 1: First quarter grain inspections, by port region



Source: USDA, Federal Grain Inspection Service

Atlantic and Great Lakes. At a record-high 1.7 mmt, first-quarter grain inspections for Atlantic and Great Lakes ports were up 171 percent from the 5-year average and up 285 percent from year to year. These large increases mainly reflected higher soybean inspections and record-large wheat

[1] Unless otherwise noted, all changes throughout this article are from year to year.

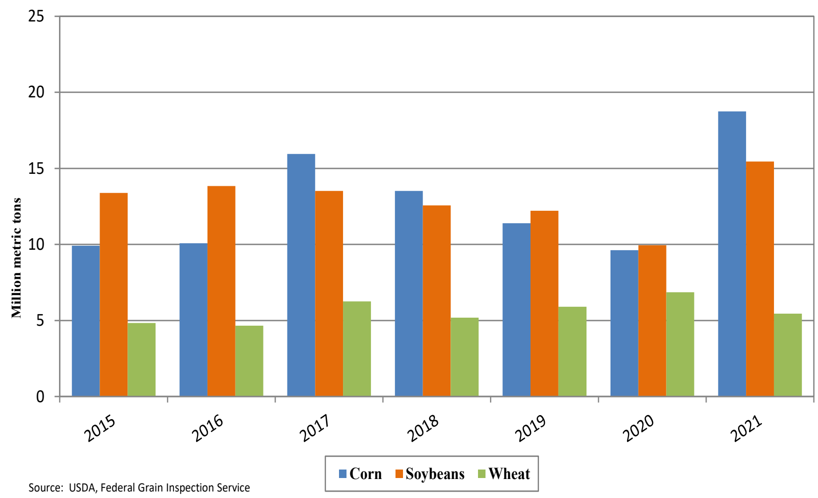
inspections. Total grain inspections in the Atlantic and Great Lakes increased primarily to Asian destinations.

Interior. At 4.2 mmt, first-quarter grain inspections in the Interior were up 25 percent from the 5-year average and up 9 percent from year to year. At 3.1 mmt, Interior shipments of grain to Mexico were up 83 percent. Inspections of corn rose 16 percent, and soybeans and wheat rose 3 percent each.

Breakdowns by Commodity

Corn. At 18.8 mmt, first-quarter 2021 corn inspections were up 55 percent from the 5-year average and up 95 percent from year to year (fig. 2). About 90 percent of first-quarter 2021 total corn shipments were destined to Asia and Latin America. First-quarter U.S. Gulf corn inspections increased 97 percent, and PNW corn inspections jumped 194 percent. Rising demand for grain from China and other Asian countries have boosted U.S. corn exports.

Figure 2: First quarter grain inspections by types



Source: USDA, Federal Grain Inspection Service

Soybeans. At 15.4 mmt, total first-quarter soybean inspections were up 25 percent from the 5-year average and up 55 percent from year to year (fig. 2). First-quarter soybean inspections in the U.S. Gulf jumped 52 percent and jumped 89 percent in PNW. At 7.6 mmt, soybeans inspected for export to China were up 143 percent.

Wheat. At 5.4 mmt, first-quarter wheat inspections were 6 percent below the 5-year average and down 21 percent from year to year. U.S. wheat inspections decreased mainly because of the 53-percent drop in the U.S. Gulf, which resulted from lower African demand—primarily, from Nigeria. Interior and Atlantic-Great Lakes wheat inspections rose year to year.

Market Outlook

According to the March issue of USDA's *World Agricultural Supply and Demand Estimates (WASDE),* the corn, wheat, and soybeans exports forecast for marketing year (MY) 2020/21 are unchanged from their numbers in the February *WASDE*. From MY 2019/20, U.S. corn exports are projected to rise 47 percent; wheat exports are projected to increase 2 percent from MY 2019/20; and soybean exports are projected to rise 34 percent. Cumulative (shipped) marketing year-to-date export sales of corn and soybeans are well above the year-to-date sales for MY 2019/20. Cumulative year-to-date export sales of wheat are unchanged from MY 2019/20 (***GTR* table 12**).
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Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
04/07/21	211	295	227	199	275	255
03/31/21	212	294	222	207	275	255

[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	4/1/2021	3/26/2021
Corn	IL–Gulf	-0.74	-0.80
Corn	NE–Gulf	-0.85	-0.92
Soybean	IA–Gulf	-0.90	n/a
HRW	KS–Gulf	-1.87	-1.87
HRS	ND–Portland	-2.04	-2.03

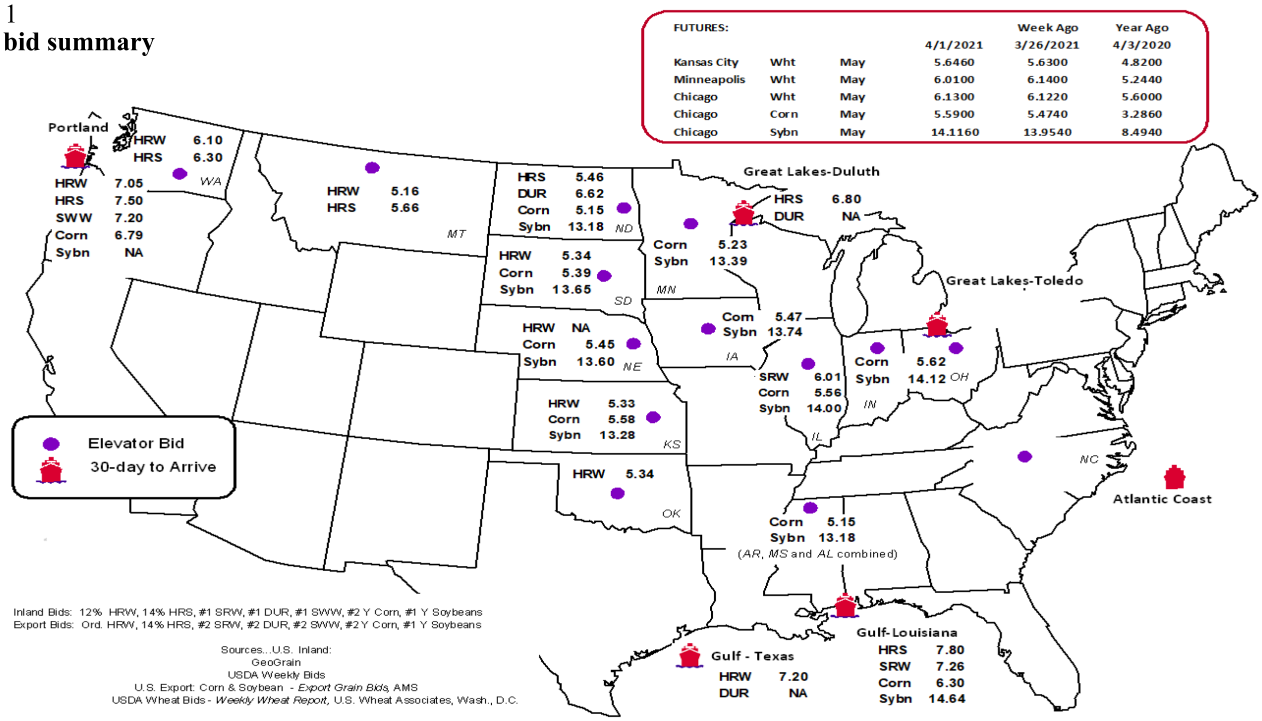
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
3/31/2021[p]	1,689	1,809	5,997	224	9,719	3/27/2021	3,600
3/24/2021[r]	1,564	1,302	6,998	524	10,388	3/20/2021	2,318
2021 YTD[r]	23,485	23,059	87,944	8,223	142,711	2021 YTD	31,995
2020 YTD[r]	4,356	8,489	55,055	2,665	70,565	2020 YTD	29,806
2021 YTD as % of 2020 YTD	539	272	160	309	202	% change YTD	107
Last 4 weeks as % of 2020[2]	1,296	207	151	114	183	Last 4wks. % 2020	124
Last 4 weeks as % of 4-year avg.[2]	258	114	111	78	121	Last 4wks. % 4 yr.	144
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.

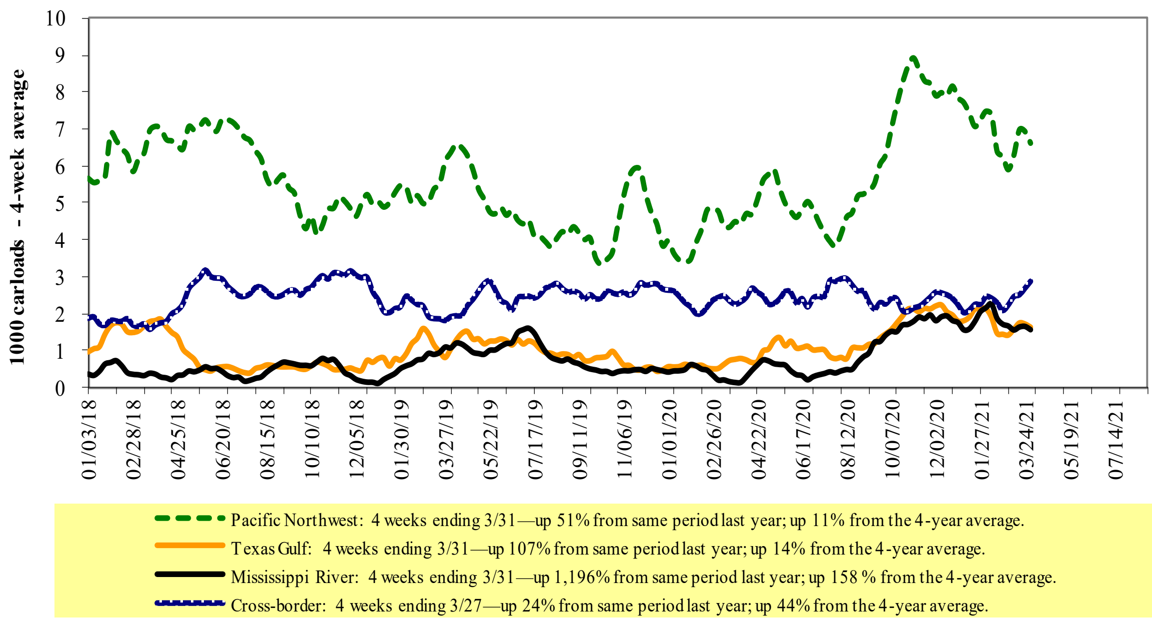
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 3/27/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,140	2,507	12,347	1,165	6,373	24,532	5,549	6,825
This week last year	1,547	2,319	11,651	1,564	5,131	22,212	4,562	4,297
2021 YTD	24,914	31,340	156,639	12,473	78,092	303,458	58,283	61,530
2020 YTD	22,333	29,561	136,327	14,246	58,529	260,996	44,140	48,718
2021 YTD as % of 2020 YTD	112	106	115	88	133	116	132	126
Last 4 weeks as % of 2020*	118	99	123	98	136	122	133	148
Last 4 weeks as % of 3-yr. avg.**	106	93	121	104	132	118	129	143
Total 2020	91,659	130,939	613,630	57,782	296,701	1,190,711	239,077	261,778

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

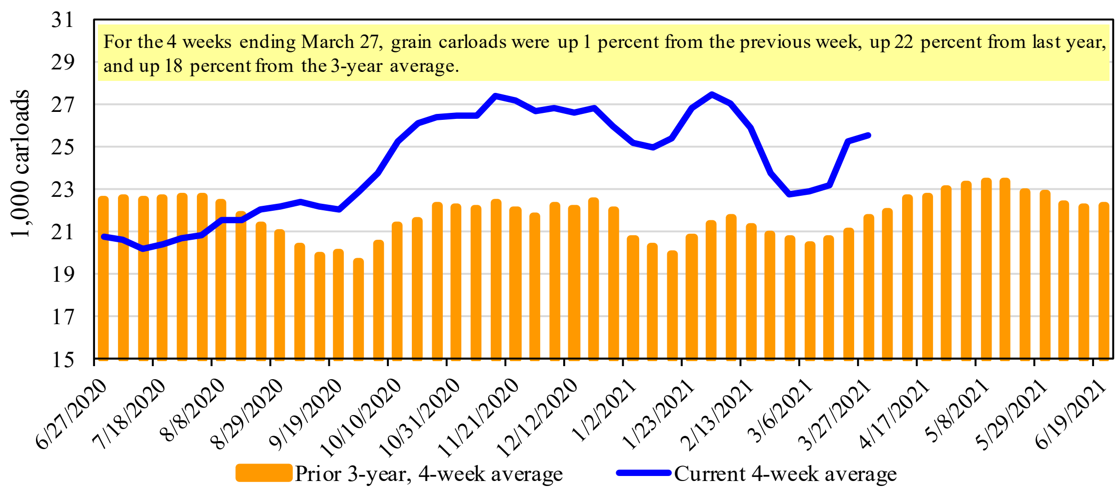
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 4/1/2021		Delivery period							
		Apr-21	Apr-20	May-21	May-20	Jun-21	Jun-20	Jul-21	Jul-20
BNSF[3]	COT grain units	no bids	0	no bids	0	no bids	no bids	no bids	no bids
	COT grain single-car	1	0	0	0	0	0	0	0
UP[4]	GCAS/Region 1	no offer	10	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no bid	n/a	n/a

[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.

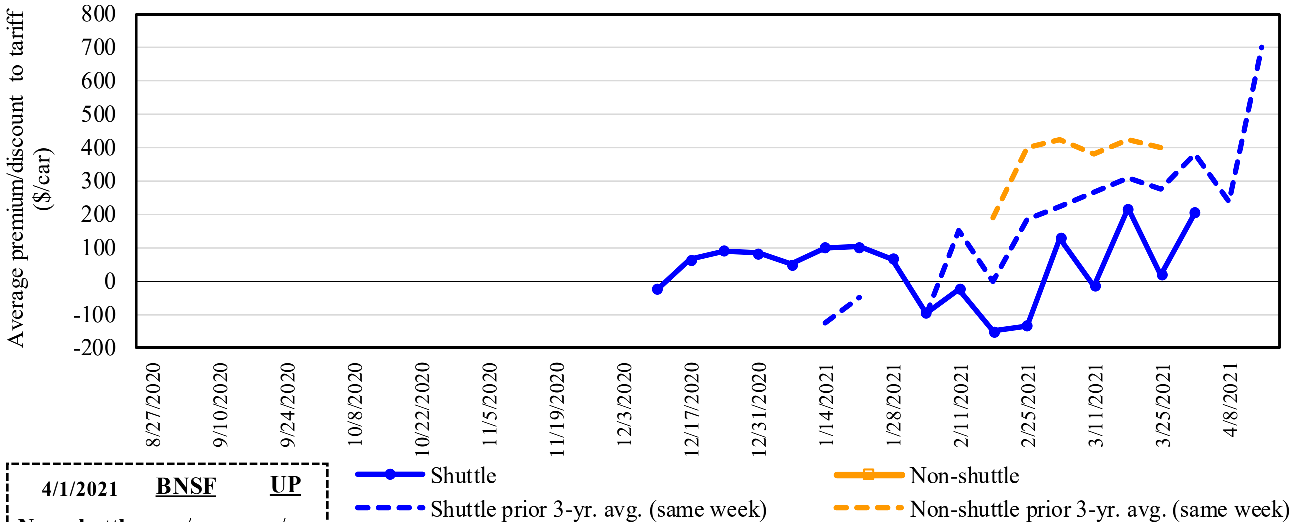
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 April 2021, secondary market

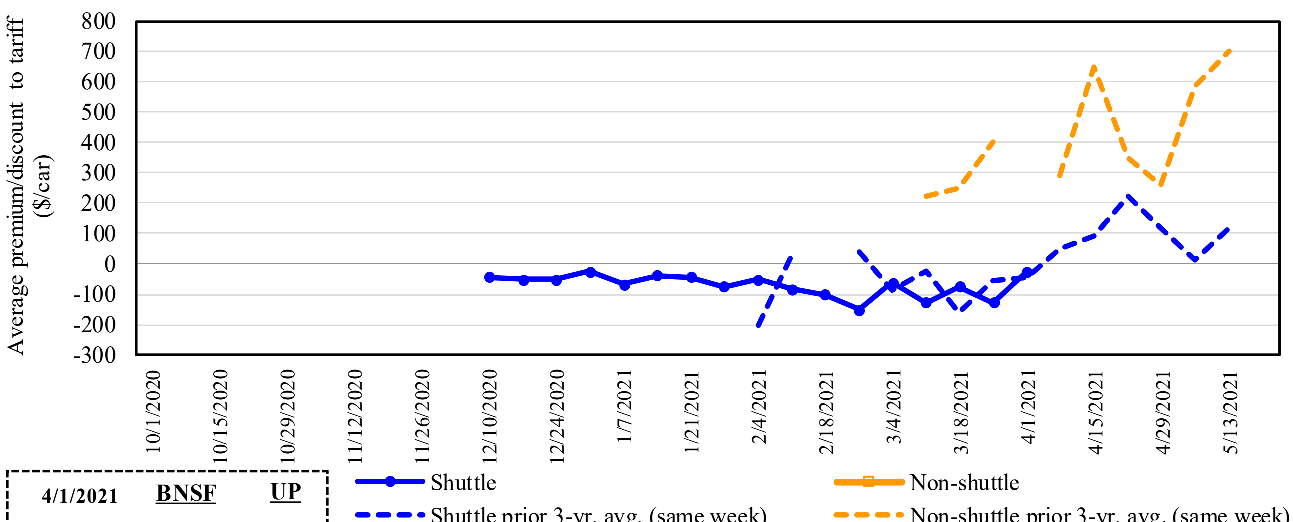


4/1/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$138	$271

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $186 this week and are $13 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 May 2021, secondary market



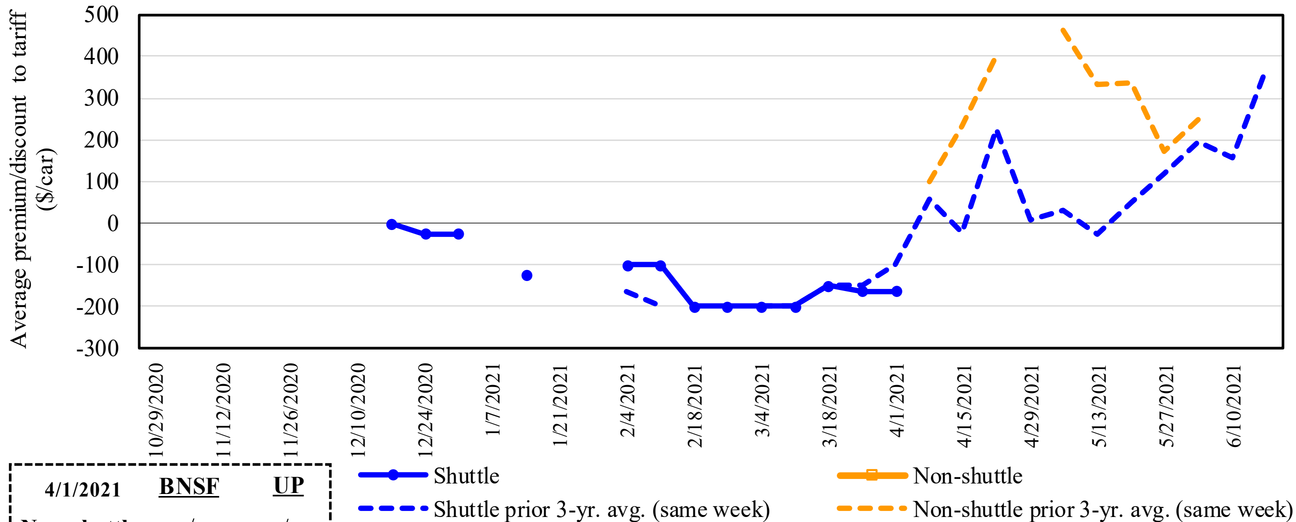
4/1/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$25	-$25

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $102 this week and are at the peak.

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

Figure 6

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



4/1/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$163	n/a

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers are unchanged this week and are $163 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: 4/1/2021	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21
		Delivery period					
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**	**138**	**(25)**	**(163)**	**(175)**	**(150)**	**(150)**
	Change from last week	204	144	26	(25)	0	0
	Change from same week 2020	163	63	n/a	n/a	n/a	n/a
	UP-Pool	**271**	**(25)**	**n/a**	**(150)**	**(200)**	**(150)**
	Change from last week	169	59	n/a	0	0	0
	Change from same week 2020	333	75	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]

April 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	$76	$40.31	$1.10	0
	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	$134	$46.26	$1.26	0
	Sioux Falls, SD	Galveston-Houston, TX	$6,851	$0	$68.03	$1.85	-2
	Colby, KS	Galveston-Houston, TX	$4,801	$146	$49.13	$1.34	0
	Amarillo, TX	Los Angeles, CA	$5,121	$204	$52.88	$1.44	-1
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$151	$40.23	$1.02	0
	Toledo, OH	Raleigh, NC	$7,833	$0	$77.79	$1.98	15
	Des Moines, IA	Davenport, IA	$2,455	$32	$24.70	$0.63	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	$94	$39.66	$1.01	2
	Des Moines, IA	Los Angeles, CA	$5,780	$273	$60.11	$1.53	1
Soybeans	Minneapolis, MN	New Orleans, LA	$5,246	$148	$53.56	$1.46	42
	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	$151	$47.63	$1.30	0
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	$240	$62.08	$1.69	-1
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	$151	$39.43	$1.00	-1
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,320	$118	$44.07	$1.12	2
	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	$174	$50.14	$1.36	0
	Toledo, OH	Huntsville, AL	$4,945	$0	$49.11	$1.34	3
	Grand Island, NE	Portland, OR	$5,260	$246	$54.67	$1.49	-1

[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: April 2021					Tariff rate plus fuel surcharge per:		
Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	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	$105	$69.65	$1.89	-1
	KS	Guadalajara, JA	$7,471	$644	$82.91	$2.25	1
	TX	Salinas Victoria, NL	$4,347	$64	$45.07	$1.23	0
Corn	IA	Guadalajara, JA	$8,902	$531	$96.38	$2.45	1
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,300	$218	$87.04	$2.21	0
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,665	$213	$80.49	$2.04	0
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$500	$92.43	$2.51	1
	NE	Guadalajara, JA	$9,157	$517	$98.84	$2.69	1
	IA	El Castillo, JA	$9,410	$0	$96.15	$2.61	-1
	KS	Torreon, CU	$8,014	$349	$85.45	$2.32	1
Sorghum	NE	Celaya, GJ	$7,772	$463	$84.15	$2.14	1
	KS	Queretaro, QA	$8,108	$131	$84.17	$2.14	0
	NE	Salinas Victoria, NL	$6,713	$105	$69.66	$1.77	0
	NE	Torreon, CU	$7,092	$314	$75.67	$1.92	1

[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.

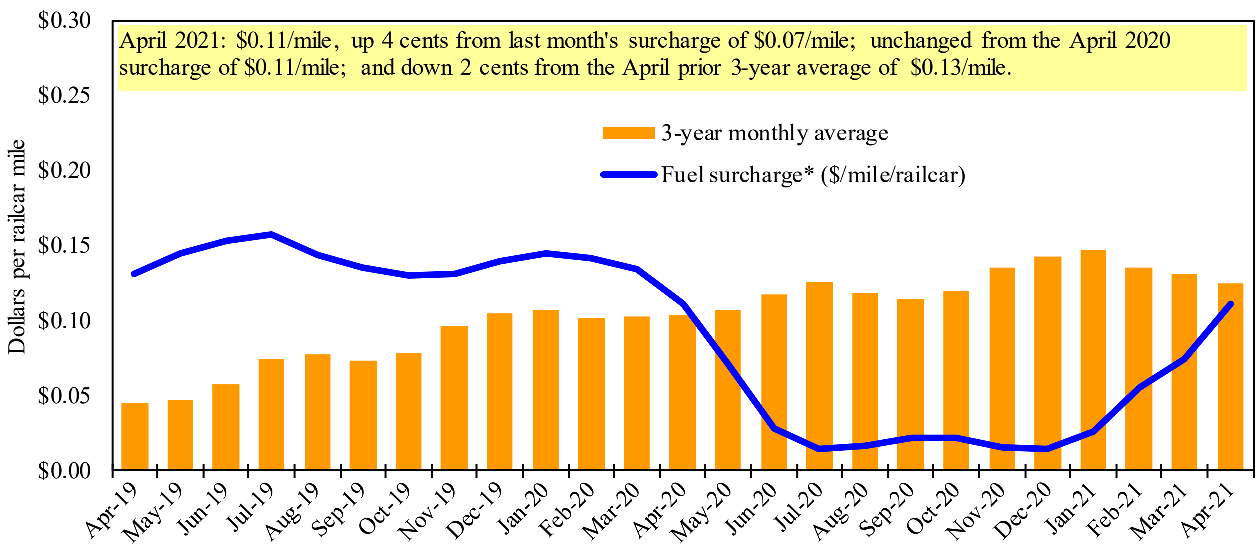
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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]

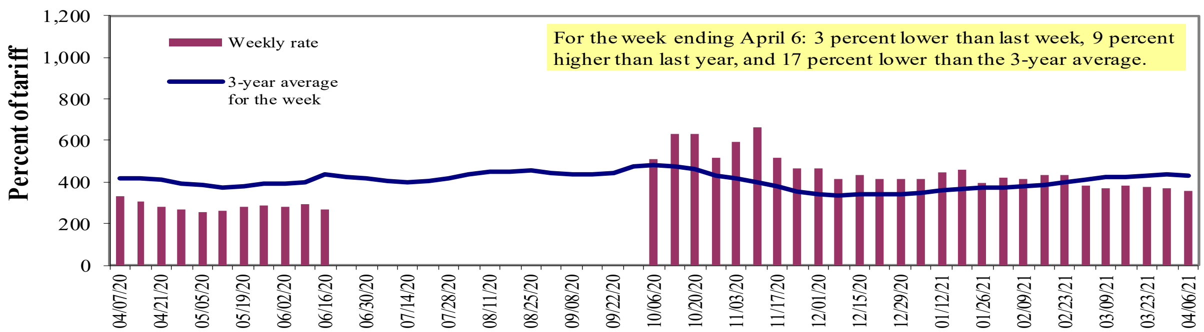


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: 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]	4/6/2021	460	372	359	250	308	308	226
	3/30/2021	490	385	372	262	317	317	238
$/ton	4/6/2021	28.47	19.79	16.66	9.98	14.45	12.44	7.10
	3/30/2021	30.33	20.48	17.26	10.45	14.87	12.81	7.47
Current week % change from the same week:								
	Last year	20	8	9	16	38	38	11
	3-year avg. [2]	-5	-14	-17	-26	-19	-20	-28
Rate[1]	May	444	354	343	246	288	288	225
	July	420	339	338	234	270	270	223

[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

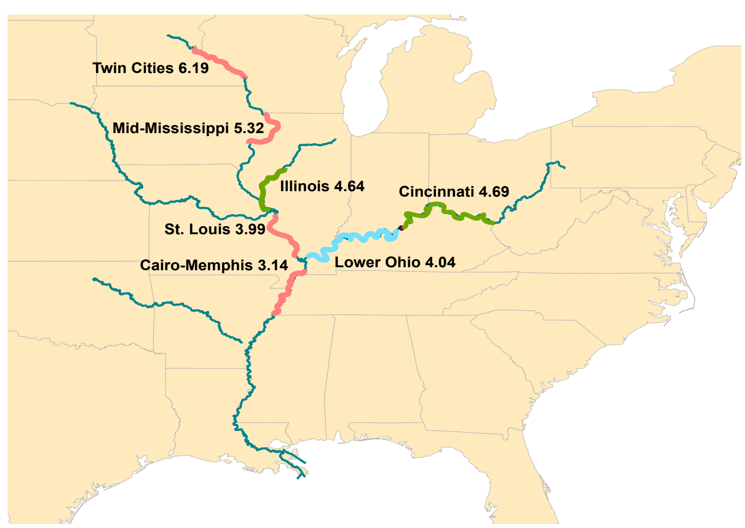
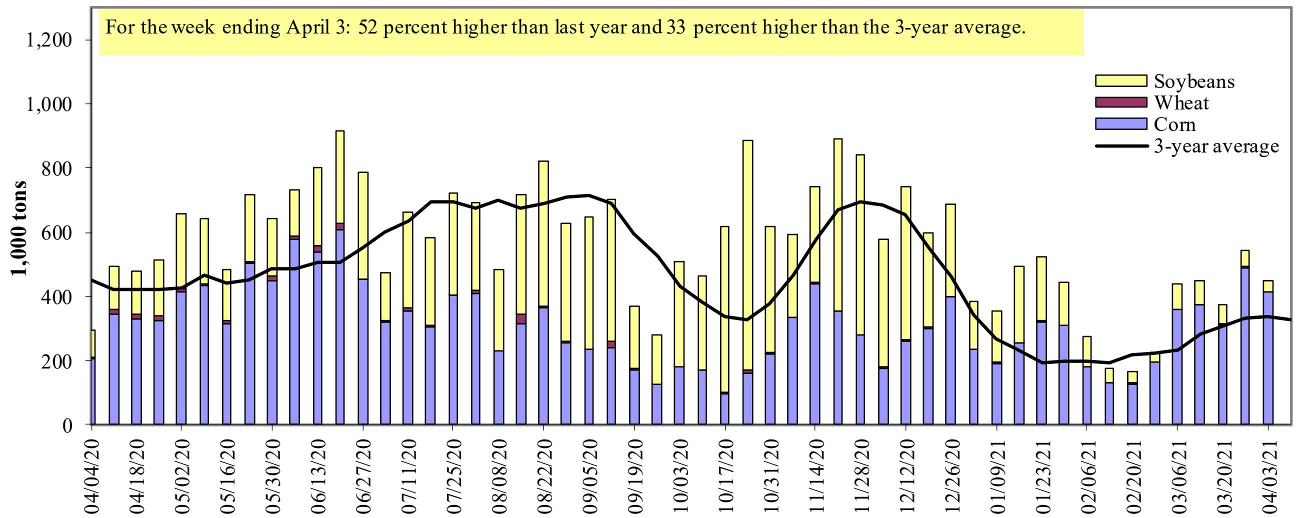


Figure 10

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 04/03/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	43	0	3	0	46
Winfield, MO (L25)	134	0	26	0	160
Alton, IL (L26)	432	0	42	0	474
Granite City, IL (L27)	415	0	35	0	450
Illinois River (La Grange)	0	0	0	0	0
Ohio River (Olmsted)	260	2	44	5	312
Arkansas River (L1)	0	12	3	0	14
Weekly total - 2021	675	13	82	5	776
Weekly total - 2020	319	21	173	2	514
2021 YTD[1]	6,857	229	2,920	108	10,113
2020 YTD[1]	3,314	396	2,778	13	6,501
2021 as % of 2020 YTD	207	58	105	803	156
Last 4 weeks as % of 2020[2]	201	82	93	1,142	163
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.

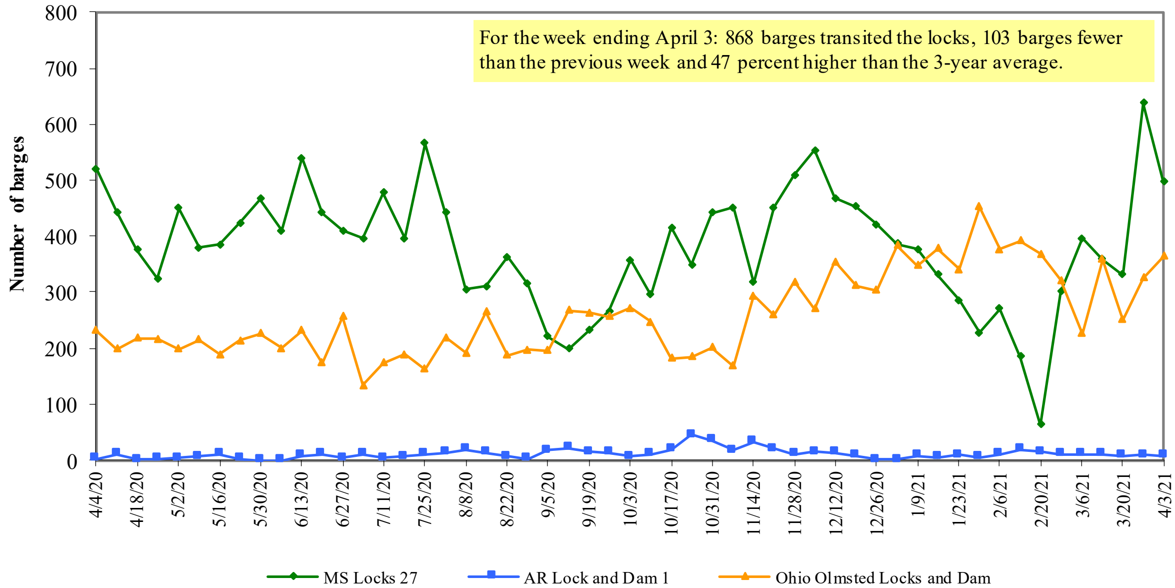
[2] As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. Illinois River La Grange lock and dam records are unavailable this week.

Source: U.S. Army Corps of Engineers.

Figure 11

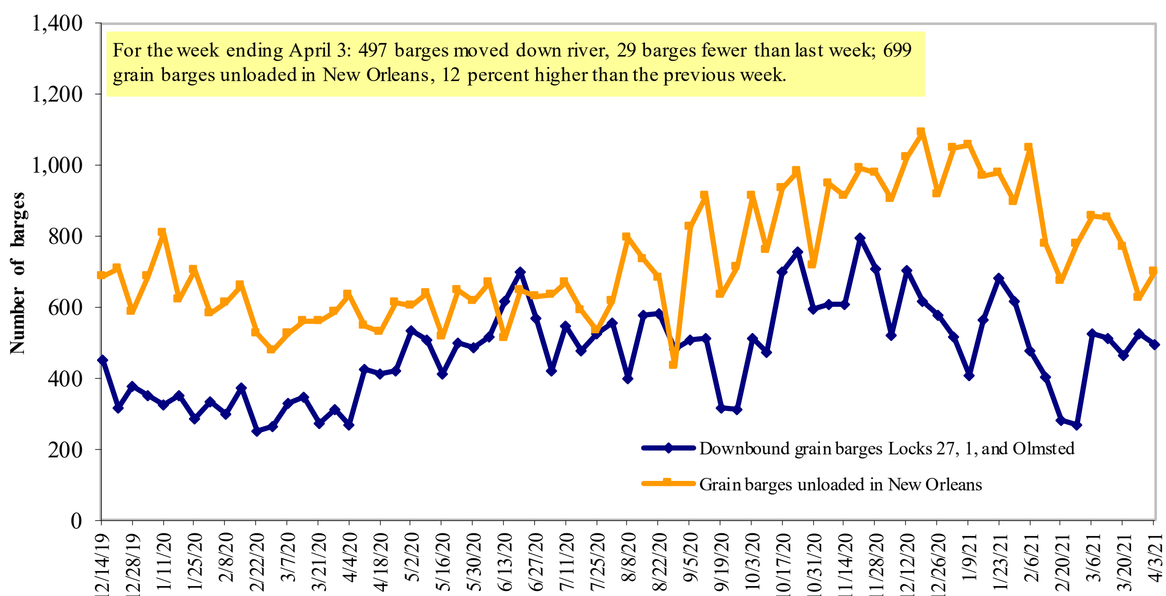
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 4/5/2021 (U.S. $/gallon)

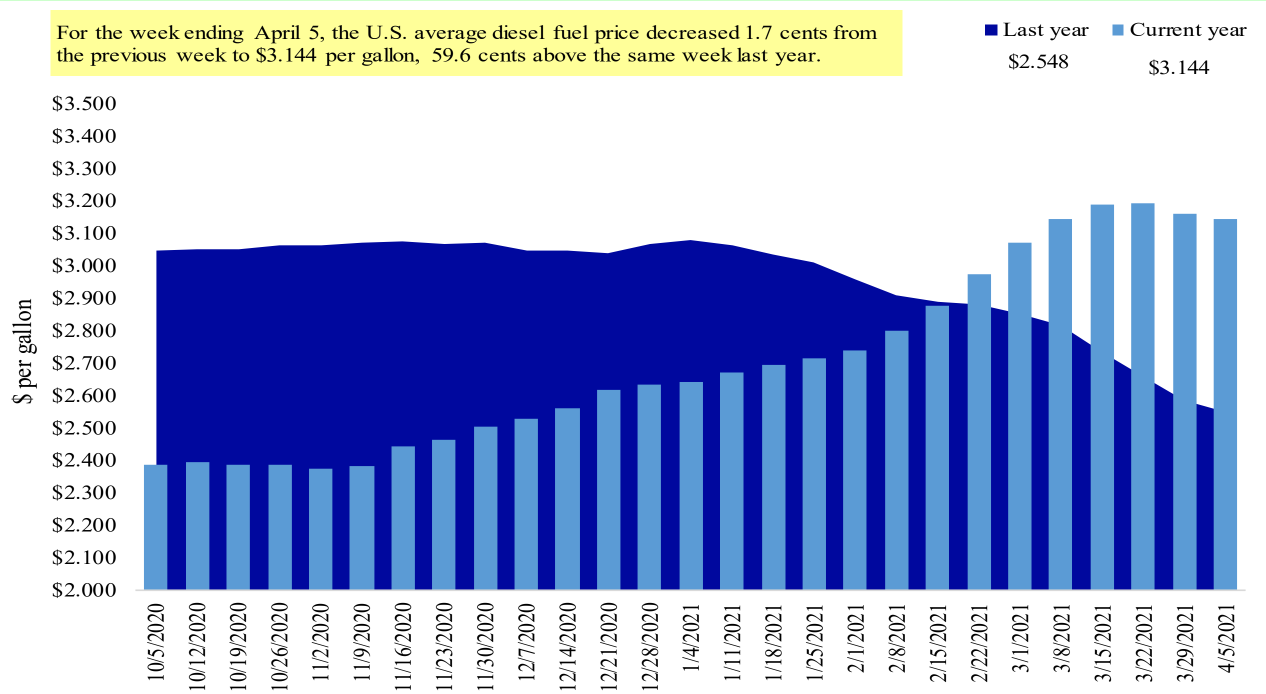
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.114	-0.016	0.480
	New England	3.076	-0.015	0.331
	Central Atlantic	3.268	-0.006	0.441
	Lower Atlantic	3.018	-0.023	0.538
II	Midwest	3.083	-0.021	0.689
III	Gulf Coast	2.934	-0.021	0.609
IV	Rocky Mountain	3.279	-0.015	0.738
V	West Coast	3.653	-0.006	0.563
	West Coast less California	3.259	-0.013	0.505
	California	3.981	-0.001	0.613
Total	United States	3.144	-0.017	0.596

[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)

For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
	Wheat								
Export balances [1]									
3/25/2021	1,427	331	1,551	2,031	78	5,418	31,808	6,025	43,251
This week year ago	1,812	279	1,538	1,149	230	5,008	13,601	5,102	23,711
Cumulative exports-marketing year [2]									
2020/21 YTD	7,087	1,452	5,927	4,629	592	19,686	33,918	54,817	108,421
2019/20 YTD	7,492	2,060	5,710	3,830	682	19,775	18,307	31,607	69,689
YTD 2020/21 as % of 2019/20	95	70	104	121	87	100	185	173	156
Last 4 wks. as % of same period 2019/20*	78	133	112	177	50	113	234	129	186
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 3/25/2021	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 -			
Mexico	12,708	11,650	9	14,869
Japan	8,906	6,849	30	11,221
Columbia	3,232	3,075	5	4,830
Korea	2,406	1,409	71	4,011
China	23,185	817	2,737	909
Top 5 importers	**50,436**	**23,800**	**112**	**35,840**
Total U.S. corn export sales	**65,726**	**31,907**	**106**	**49,983**
% of projected exports	99%	71%		
Change from prior week[2]	**797**	**1,075**		
Top 5 importers' share of U.S. corn export sales	77%	75%		72%
USDA forecast March 2021	**66,158**	**45,242**	**46**	
Corn use for ethanol USDA forecast, March 2021	**125,730**	**123,368**	**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 3/25/2021	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	36,048	12,474	189	19,106
Mexico	4,545	3,971	14	4,591
Egypt	2,552	2,241	14	2,980
Indonesia	1,808	1,527	18	2,360
Japan	1,858	2,002	(7)	2,288
Top 5 importers	**46,811**	**22,215**	**111**	**31,324**
Total U.S. soybean export sales	**60,842**	**36,709**	**66**	**49,352**
% of projected exports	99%	80%		
change from prior week[2]	**106**	**958**		
Top 5 importers' share of U.S. soybean export sales	77%	61%		**63%**
USDA forecast, March 2021	**61,308**	**45,831**	**134**	

[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 3/25/2021	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	3,422	3,544	(3)	3,213
Philippines	3,145	3,206	(2)	2,888
Japan	2,456	2,679	(8)	2,655
Nigeria	1,393	1,472	(5)	1,433
Korea	1,829	1,570	16	1,372
Indonesia	879	997	(12)	1,195
Taiwan	1,138	1,190	(4)	1,175
Thailand	808	854	(5)	727
Italy	570	802	(29)	622
Colombia	368	763	(52)	618
Top 10 importers	**16,007**	**17,076**	(6)	**15,897**
Total U.S. wheat export sales	**25,104**	**24,783**	1	**23,821**
% of projected exports	94%	94%		
change from prior week[2]	**250**	**73**		
Top 10 importers' share of U.S. wheat export sales	64%	69%		67%
USDA forecast, March 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 04/01/21	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	408	156	262	4,022	3,930	102	180	177	15,966
Corn	531	521	102	4,833	1,646	294	229	152	9,969
Soybeans	0	12	0	3,625	2,137	170	58	12	14,028
Total	**939**	**689**	**136**	**12,480**	**7,713**	**162**	**193**	**123**	**39,963**
Mississippi Gulf									
Wheat	58	11	538	479	970	49	60	48	3,422
Corn	1,133	978	116	12,990	7,282	178	176	183	28,781
Soybeans	145	218	67	8,853	7,273	122	85	77	38,013
Total	**1,336**	**1,207**	**111**	**22,322**	**15,526**	**144**	**142**	**139**	**70,215**
Texas Gulf									
Wheat	61	119	52	911	1,031	88	121	100	4,248
Corn	5	23	23	174	168	104	175	164	723
Soybeans	0	29	0	648	7	n/a	n/a	n/a	2,098
Total	**67**	**171**	**39**	**1,734**	**1,206**	**144**	**134**	**112**	**7,068**
Interior									
Wheat	98	38	261	695	655	106	133	195	2,263
Corn	208	168	124	2,251	1,996	113	131	146	8,683
Soybeans	143	138	103	1,903	1,858	102	134	120	7,274
Total	**449**	**344**	**131**	**4,849**	**4,509**	**108**	**132**	**141**	**18,220**
Great Lakes									
Wheat	0	0	n/a	19	1	n/a	n/a	20	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	n/a	1,111
Total	**0**	**0**	**n/a**	**19**	**1**	**n/a**	**n/a**	**20**	**2,113**
Atlantic									
Wheat	0	0	n/a	71	1	n/a	n/a	172	65
Corn	0	0	n/a	0	0	n/a	n/a	0	33
Soybeans	26	66	39	873	296	295	226	111	1,870
Total	**26**	**66**	**39**	**945**	**296**	**319**	**288**	**116**	**1,968**
U.S. total from ports*									
Wheat	625	323	194	6,199	6,588	94	146	136	26,854
Corn	1,879	1,690	111	20,249	11,092	183	180	168	48,301
Soybeans	314	463	68	15,902	11,570	137	99	68	64,394
Total	**2,818**	**2,476**	**114**	**42,350**	**29,250**	**145**	**154**	**132**	**139,548**

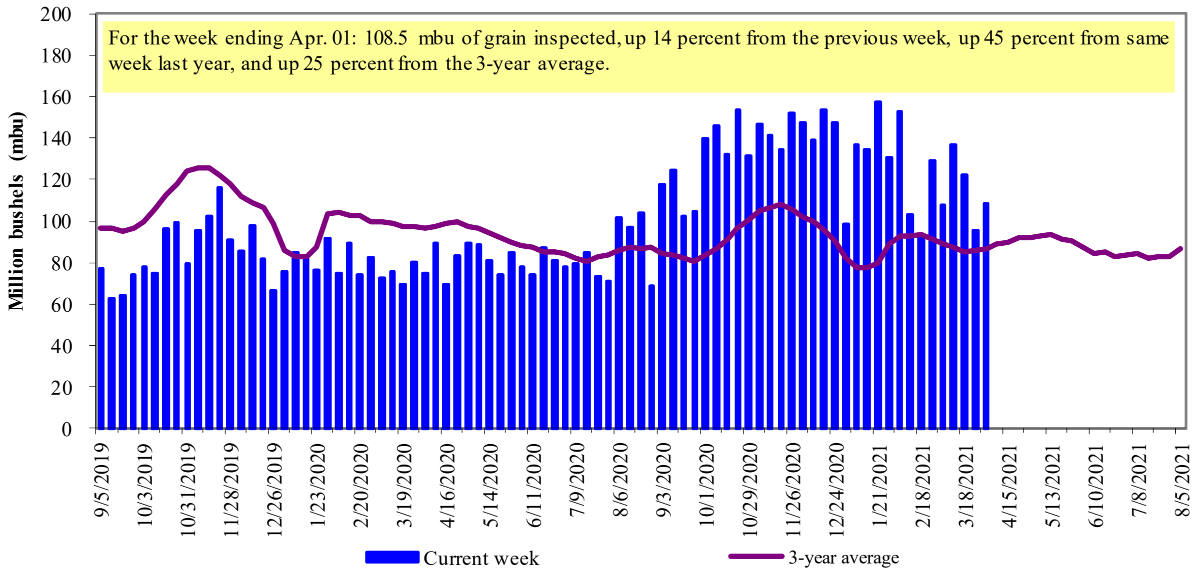
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

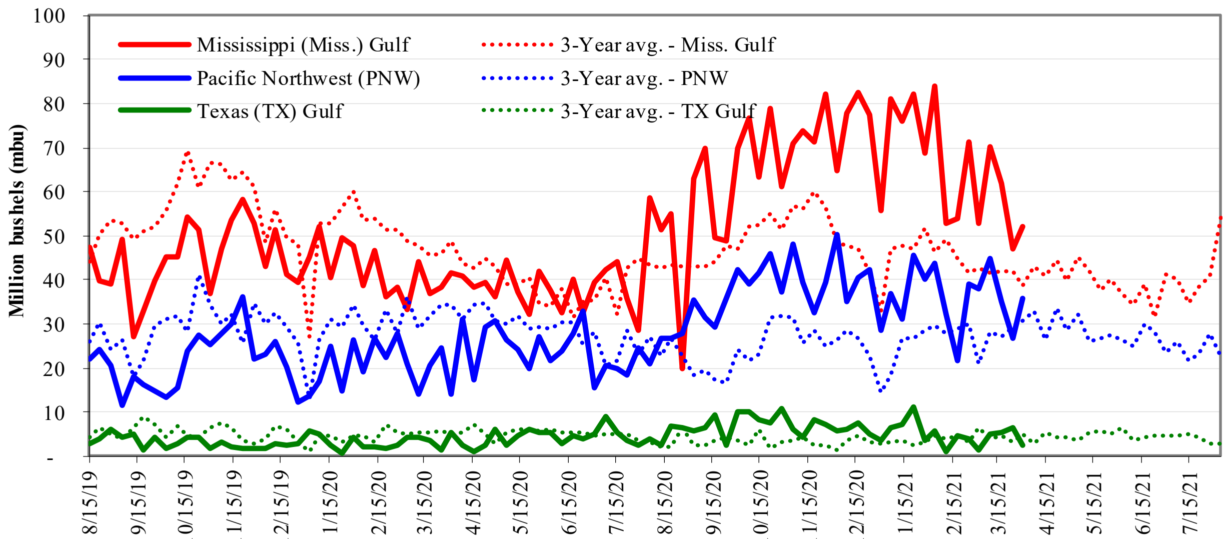


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 04/01/21 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	52.1	Last wk:	up 11	down 61	up 2	up 35
PNW:	35.9	Last Year (same wk):	up 25	down 54	up 16	up 157
TX Gulf:	2.5	3-yr avg. (4-wk. mov. Avg):	up 27	down 42	up 20	up 25

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

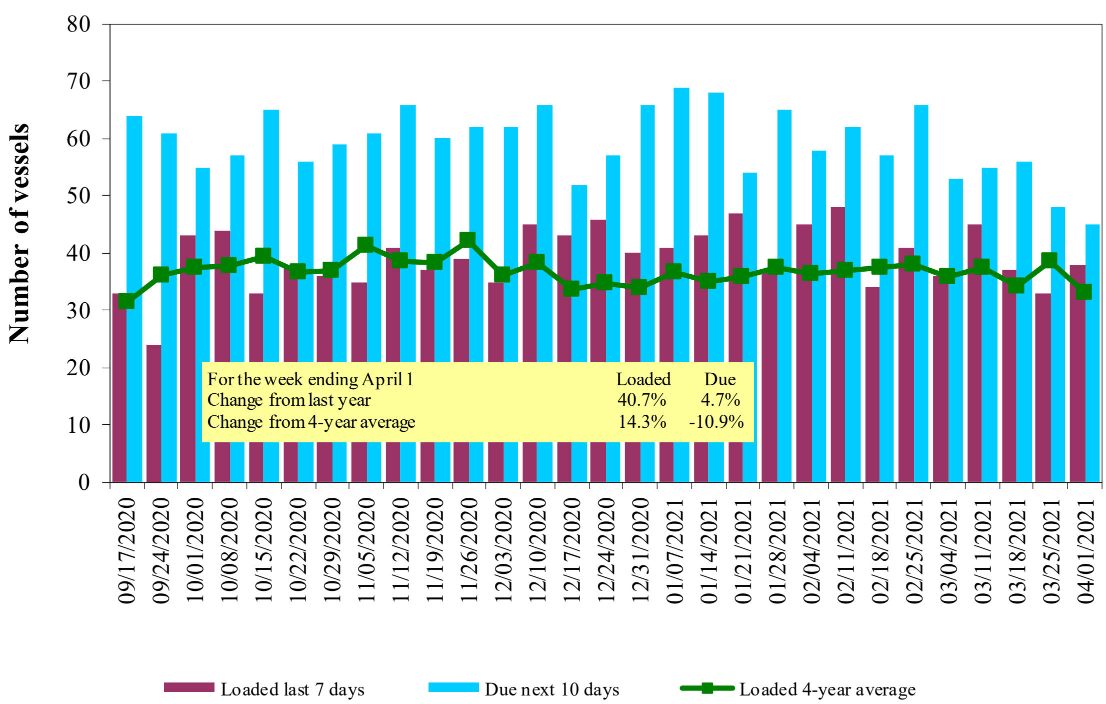
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
4/1/2021	38	38	45	14
3/25/2021	38	33	48	17
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

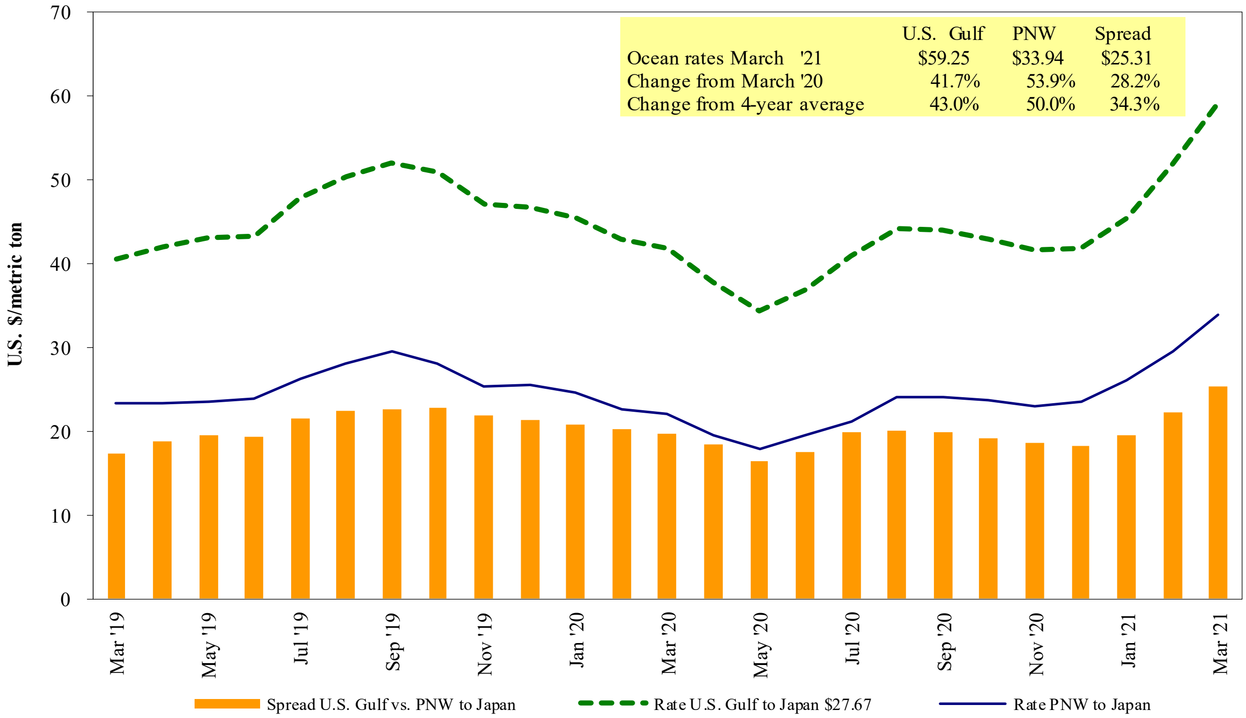
U.S. Gulf[1] vessel loading activity



[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 04/03/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Aug 21/Sep 9	50,000	60.90
U.S. Gulf	Japan	Grain	May 25/Jun 25	50,000	46.85 op 47.85
U.S. Gulf	Japan	Wheat	May 1/15	31,877	58.33
U.S. Gulf	Japan	Wheat	May 1/14	47,405	67.50
U.S. Gulf	Japan	Heavy grain	Apr 15/May 15	50,000	47.00
U.S. Gulf	Japan	Heavy grain	Apr 1/30	48,000	46.75
U.S. Gulf	China	Heavy grain	Apr 14/29	68,000	63.50
U.S. Gulf	South Korea	Heavy grain	Feb 20/28	51,000	51.50
U.S. Gulf	Pt Sudan	Sorghum	Feb 15/25	34,860	143.13*
U.S. Gulf	Vietnam	Corn	Feb 5/15	70,000	47.25
PNW	Japan	Grain	Mar 5/14	28,000	48.10
PNW	Taiwan	Corn	Feb 20/Mar 15	65,000	24.90
Brazil	China	Heavy grain	Mar 21/31	66,000	44.00
Brazil	China	Heavy grain	Mar 21/30	66,000	45.50
River Plate	S. Korea	Corn	May 1/31	68,000	52.60*
Ukraine	China	Corn	Feb 10/17	60,000	36.40 op 38.90

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

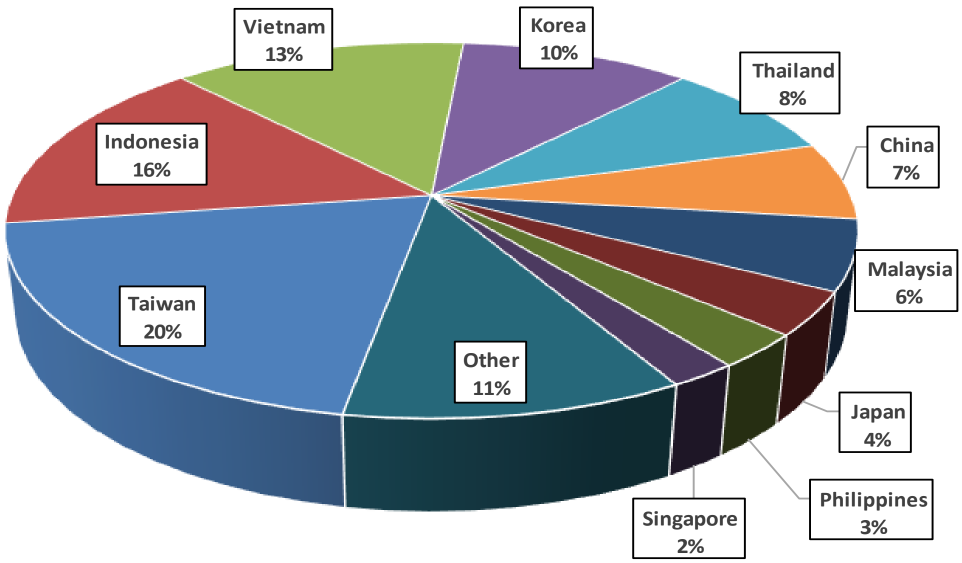
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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-Dec 2020

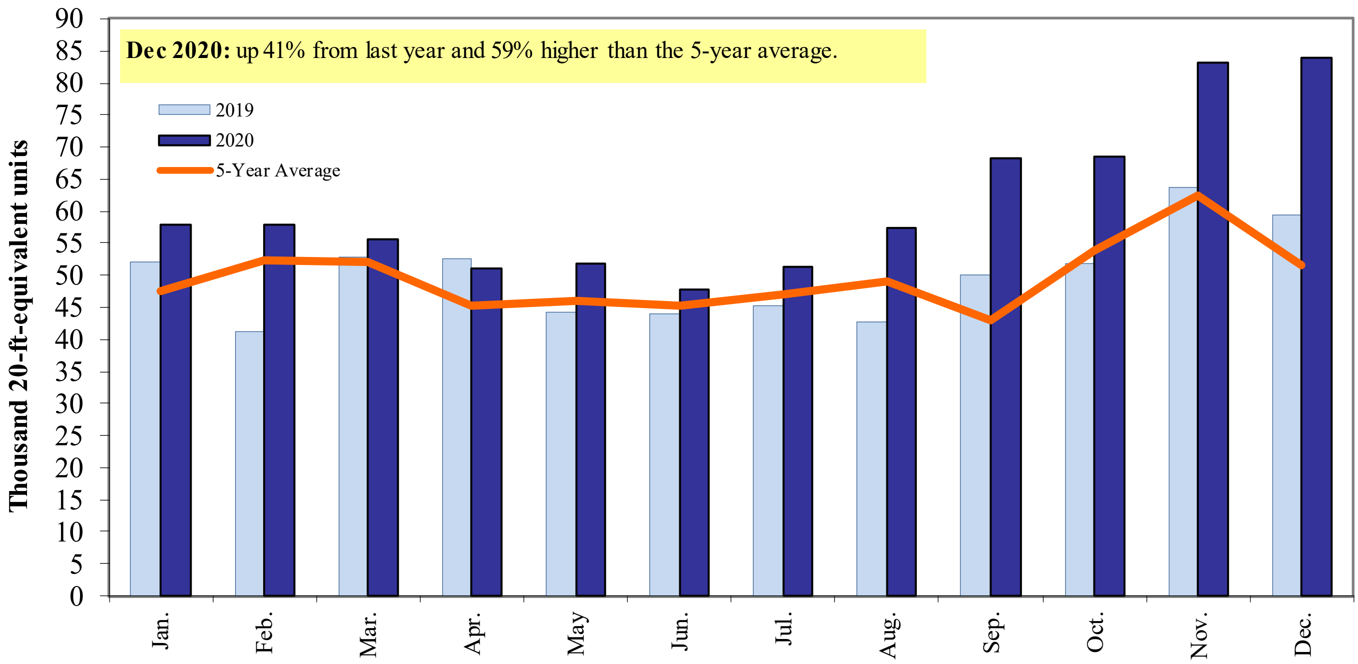


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

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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