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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May 6, 2021

Contents

The next release is May 13, 2021

WEEKLY HIGHLIGHTS

Agriculture Industry Urges DOT To Protect U.S. Exporters

On April 27, 2021, 300 agriculture and forest product companies sent a letter to the Department of Transportation's (DOT) Secretary urging DOT to help protect their export businesses by intervening with vessel-operating common carriers (VOCCs). Exporters report that, over the last year, global ocean carriers often return containers empty overseas to be loaded and shipped again, rather than loading the containers with U.S. exports. In their letter to DOT, the companies note VOCCs return the containers empty because high import freight rates—combined with congestion and delay at U.S. ports—make it profitable to do so. The letter urges DOT to assist the Federal Maritime Commission in expediting its enforcement options.

Railroads and Agricultural Shippers Collaborate to Improve Food Safety in Covered Hopper Cars

The Association of American Railroads (AAR), a coalition of agricultural shippers, and Railinc (a rail technology developer) are collaborating to improve tracking of recent commodities carried in covered hopper rail cars. Via an online portal with a secure and searchable interface, agricultural shippers will soon be able to identify the contents of the last three loads hauled in a particular rail car. Expected to launch later this year, the portal will provide shippers with better information to help prevent potential cross-contact with food allergens. The portal will also facilitate compliance with the U.S. Food and Drug Administration's food sanitary transportation rules under the Food Safety Modernization Act.

Illinois DOT Issues $7 Million for Improving Roads

The Illinois Department of Transportation (IDOT) awarded $7 million in grants for 21 projects through IDOT's Truck Access Route Program. The program helps counties, municipalities, and towns upgrade roads to make them designated truck routes accommodating 80,000-pound trucks. Up to $900,000 may be awarded to projects that improve connections with other designated truck routes and with freight-traffic-generating businesses. In total, these projects cost $36 million and are expected to manage truck traffic, create jobs, and boost economic activity in Illinois. The full list of awards can be found here.

Snapshots by Sector

Export Sales

For the week ending April 22, **unshipped balances** of wheat, corn, and soybeans totaled 35.2 million metric tons (mmt). This was 5-percent lower than last week, but 50 percent higher than the same time last year. Net **corn export sales** were 0.521 mmt, up 35 percent from the previous week. Net **soybean export sales** were 0.293 mmt, up significantly from the previous week. Net weekly **wheat export sales** were 0.224 mmt, down 7 percent from the previous week.

Rail

U.S. Class I railroads originated 25,467 **grain carloads** during the week ending April 24. This was a 3-percent decrease from the previous week, 18 percent more than last year, and 5 percent more than the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were $42 below tariff for the week ending April 29. This was $80 less than last week and $107 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending May 1, **barge grain movements** totaled 671,536 tons. This was 30 percent less than the previous week and 1 percent more than the same period last year.

For the week ending May 1, 438 grain barges **moved down river**—159 barges fewer than the previous week. There were 809 grain barges **unloaded in New Orleans**, 11 percent more than the previous week.

Ocean

For the week ending April 29, 35 **oceangoing grain vessels** were loaded in the Gulf—3 percent fewer than the same period last year. Within the next 10 days (starting April 30), 52 vessels were expected to be loaded—24 percent more than the same period last year.

As of April 29, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $63.00. This was 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was $36.50 per mt, unchanged from the previous week.

Fuel

For the week ending May 3, the U.S. average **diesel fuel price** increased 1.8 cents from the previous week to $3.142 per gallon, 74.3 cents above the same week last year.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* May 6, 2021.
Web: http://dx.doi.org/10.9752/TS056.05-06-2021

Feature Article/Calendar

First-Quarter Wheat Transportation and Landed Costs Increase

From fourth quarter 2020 to first quarter 2021 (quarter to quarter), transportation costs rose for shipping wheat to Japan from Kansas (KS) and North Dakota (ND)—both via the Pacific Northwest (PNW routes) and the U.S. Gulf (Gulf routes). Quarter to quarter, a jump in ocean freight and trucking rates was the main driver behind the higher transportation costs. Higher trucking and ocean freight rates also drove the rise in transportation costs for shipping wheat via all routes from first quarter 2020 to first quarter 2021 (year to year) (tables 1 and 2). Higher wheat farm values continued to contribute to higher total landed costs for all routes, both from quarter to quarter and year to year. Total U.S. wheat exports to Japan were up moderately from quarter to quarter, but down slightly from year to year.

Transportation Costs

From quarter to quarter, transportation costs for shipping wheat via the Gulf routes increased 13 percent for the Kansas origin and 11 percent for the North Dakota origin. Also, quarter to quarter, transportation costs via the PNW routes from each State increased 10 percent. Year to year, transportation costs via the PNW routes were up 8 percent from Kansas and up 9 percent from North Dakota. For the same period, transportation costs for shipping via the Gulf routes increased 11 percent from Kansas and 9 percent from North Dakota (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	2020 1st qtr	2020 4th qtr	2021 1st qtr	Year-to-year change	Quarterly change	2020 1st qtr	2020 4th qtr	2021 1st qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	10.70	11.38	13.66	27.66	20.04	10.70	11.38	13.66	27.66	20.04
Rail[1]	62.83	60.81	61.24	-2.53	0.71	57.61	56.37	56.37	-2.15	0.00
Ocean vessel	23.10	23.40	29.85	29.22	27.56	23.10	23.40	29.85	29.22	27.56
Transportation costs	96.63	95.59	104.75	8.40	9.58	91.41	91.15	99.88	9.27	9.58
Farm value[2]	160.81	193.39	215.20	33.82	11.28	173.19	186.66	205.27	18.52	9.97
Total landed cost	257.44	288.98	319.95	24.28	10.72	264.60	277.81	305.15	15.33	9.84
Transport % of landed cost	37.53	33.08	32.74			34.55	32.81	32.73		

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

	Kansas					North Dakota				
Mode	2020 1st qtr	2020 4th qtr	2021 1st qtr	Year-to-year change	Quarterly change	2020 1st qtr	2020 4th qtr	2021 1st qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	10.70	11.38	13.66	27.66	20.04	10.70	11.38	13.66	27.66	20.04
Rail[1]	43.31	42.07	42.07	-2.86	0.00	60.78	59.23	59.54	-2.04	0.52
Ocean vessel	43.38	42.11	52.19	20.31	23.94	43.38	42.11	52.19	20.31	23.94
Transportation costs	97.39	95.56	107.92	10.81	12.93	114.86	112.72	125.39	9.17	11.24
Farm value[2]	160.81	193.39	215.20	33.82	11.28	173.19	186.66	205.27	18.52	9.97
Total landed cost	258.20	288.95	323.12	25.14	11.83	288.05	299.38	330.66	14.79	10.45
Transport % of landed cost	37.72	33.07	33.40			39.88	37.65	37.92		

[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.

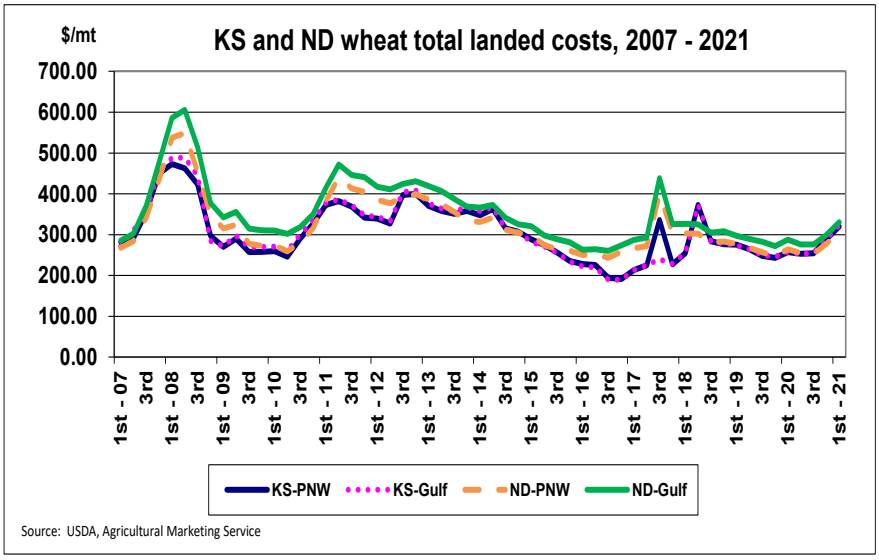
Ocean Freight and Trucking Rates

Quarter to quarter, ocean freight rates for shipping via the PNW routes rose 28 percent and, via the Gulf routes, rose 24 percent (tables 1 and 2). This large increase was due to the reopening of world economies and higher demand for iron ore (*Grain Transportation Report, April 15, 2021*). Year to year, ocean freight rates for shipping wheat via the PNW routes increased 29 percent and, via the Gulf routes, increased 20 percent. Quarter to quarter, trucking rates for transporting grain to a local elevator in both States increased 20 percent, due in part to rising trucking activity in both regions and significant increases in diesel prices. Year to year, trucking rates rose 28 percent.

Rail Tariff Rates

Quarter to quarter, rail tariff rates for shipping wheat to PNW were up 1 percent from Kansas, but unchanged from North Dakota (tables 1 and 2). Year to year, rail rates to PNW decreased 3 percent from

Kansas and 2 percent from North Dakota. Quarter to quarter, rail rates to the Gulf were unchanged from Kansas, but up 1 percent from North Dakota. Year to year, rail rates for shipping wheat to the Gulf were down 3 percent from Kansas and down 2 percent from North Dakota.



Total Landed Costs

Quarter to quarter, total landed costs for shipping wheat from Kansas to Japan rose 11 percent via the KS-PNW route and 12 percent via the KS-Gulf route, as Kansas farm values continued to rise (tables 1 and 2). Year to year, Kansas-to-Japan landed costs increased 24 percent for the PNW routes and 25 percent for the Gulf routes, due mainly to higher ocean freight rates and farm values. Quarter to quarter, total landed costs for shipping wheat from North Dakota to Japan were up 10 percent for each route, ND-PNW and ND-Gulf, reflecting higher North Dakota farm values and ocean rates. Year to year, North Dakota-to-Japan landed costs increased 15 percent for each route, responding to higher trucking and ocean rates, as well as higher farm values.

First-quarter 2021 total landed costs for shipping wheat via the PNW and Gulf routes ranged from $305 per mt to $331 per mt. First-quarter Kansas transportation costs represented 33 percent of total landed costs (for each route—KS-PNW and KS-Gulf)—unchanged from the previous quarter, but below the same period last year. First-quarter North Dakota wheat transportation costs represented 33 percent of total landed costs for the ND-PNW route and 38 percent for the ND-Gulf route, and like the Kansas shares, were unchanged from the previous quarter but below last year.

Export Forecasts

According to USDA's Federal Grain Inspection Service, first-quarter 2021 inspections of wheat for export to Japan totaled .628 million metric tons (mmt)—unchanged from year to year and up 10 percent from quarter to quarter. First-quarter 2021 wheat exports to Japan represented 11 percent of total U.S. wheat exports (*GTR*, April 8, 2021). Current year-to-date outstanding (unshipped) export balances of wheat and cumulative (shipped) exports are unchanged from the same time in 2020 (***GTR* table 12**). According to USDA's April *World Agricultural Supply and Demand Estimates* (WASDE), U.S. wheat exports for marketing year 2020/21 are projected to reach 26.8 mmt, unchanged from the March forecast and up 2 percent from 2019/20. *Johnny.Hill@.usda.gov*

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
05/05/21	211	297	221	189	282	259
04/28/21	210	295	222	192	280	259

[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

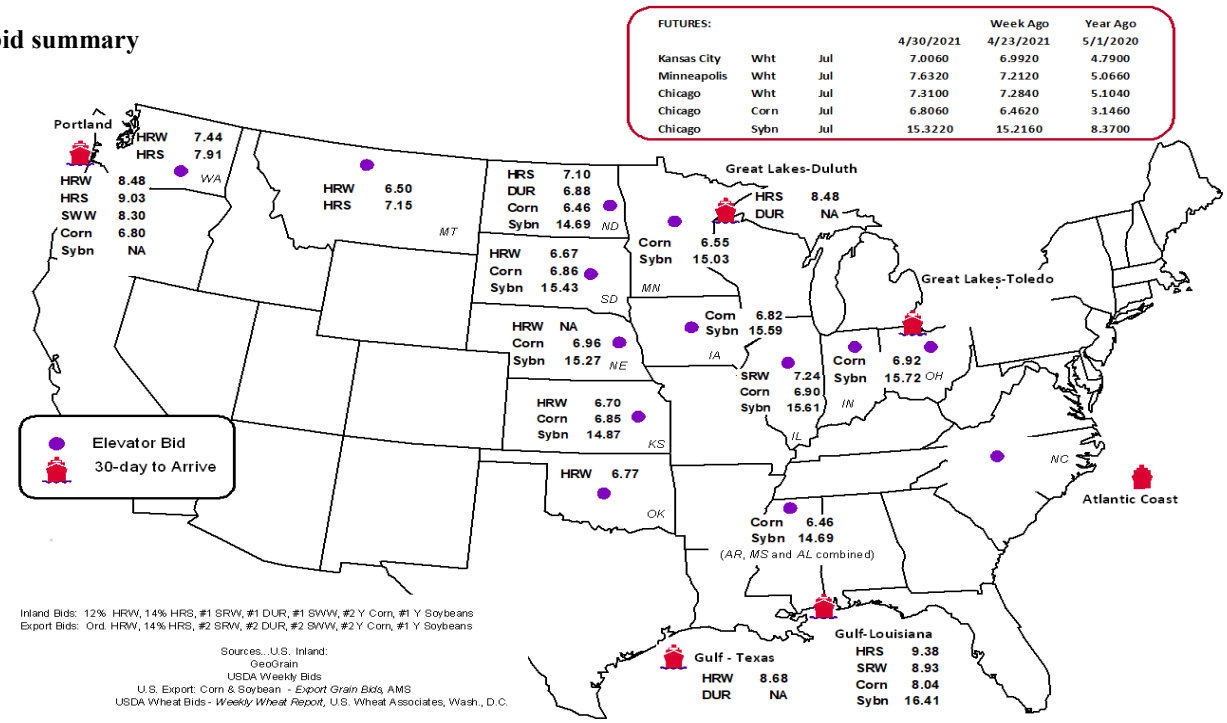
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	4/30/2021	4/23/2021
Corn	IL–Gulf	-1.14	-0.67
Corn	NE–Gulf	-1.08	-0.81
Soybean	IA–Gulf	-0.82	-0.84
HRW	KS–Gulf	-1.98	-2.01
HRS	ND–Portland	-1.93	-1.89

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]
4/28/2021[p]	750	1,667	7,795	259	10,471	4/24/2021	2,767
4/21/2021[r]	1,152	870	6,594	216	8,832	4/17/2021	3,173
2021 YTD[r]	28,799	29,069	115,228	9,381	182,477	2021 YTD	43,698
2020 YTD[r]	6,776	11,375	75,459	3,469	97,079	2020 YTD	40,211
2021 YTD as % of 2020 YTD	425	256	153	270	188	% change YTD	109
Last 4 weeks as % of 2020[2]	179	150	121	131	131	Last 4wks. % 2020	117
Last 4 weeks as % of 4-year avg.[2]	242	117	114	69	121	Last 4wks. % 4 yr.	120
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.

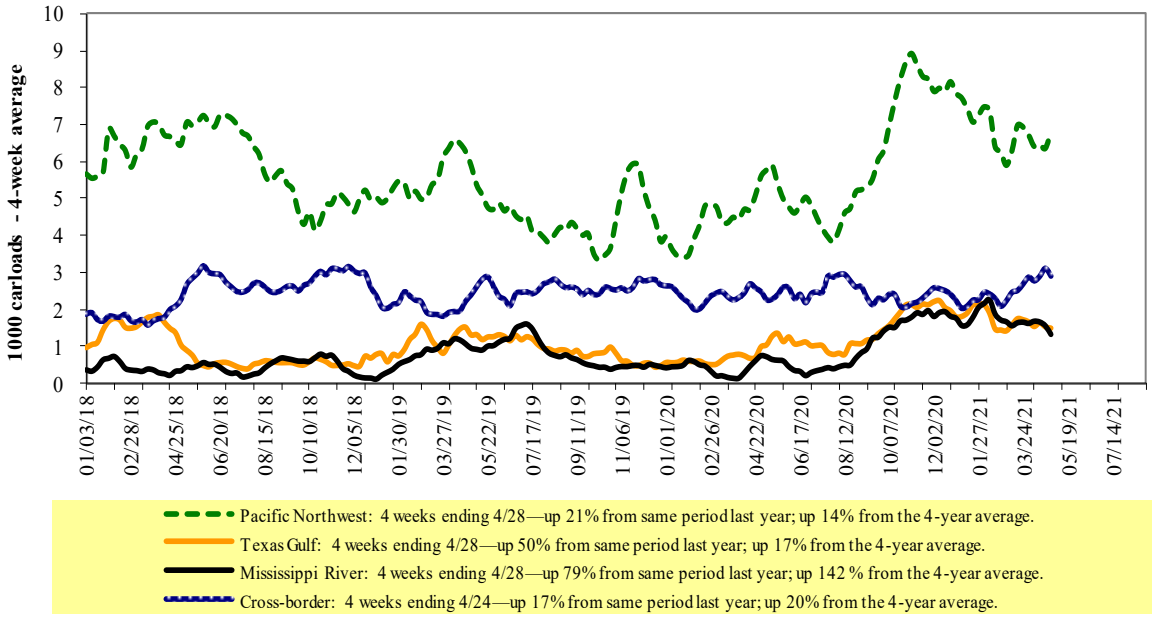
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
4/24/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,589	2,678	13,750	900	6,550	25,467	4,036	6,272
This week last year	1,590	2,410	10,728	892	5,985	21,605	4,220	5,783
2021 YTD	32,034	41,541	209,715	16,480	105,417	405,187	79,093	86,869
2020 YTD	29,150	39,068	180,119	17,988	79,964	346,289	63,238	69,961
2021 YTD as % of 2020 YTD	110	106	116	92	132	117	125	124
Last 4 weeks as % of 2020*	104	107	121	107	127	119	109	119
Last 4 weeks as % of 3-yr. avg.**	92	99	110	102	124	110	107	123
Total 2020	91,659	130,759	613,630	57,782	296,701	1,190,531	238,898	261,778

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

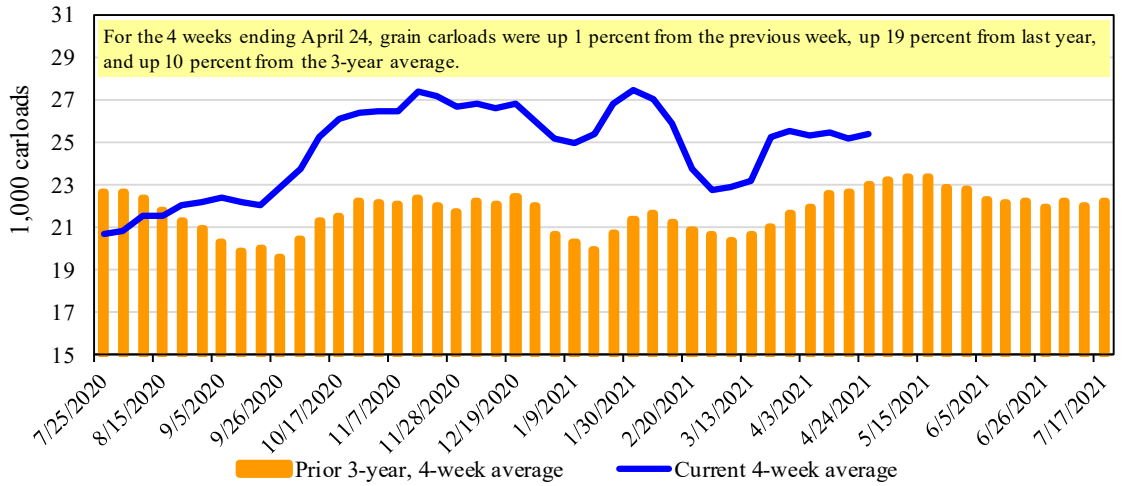
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
4/29/2021		May-21	May-20	Jun-21	Jun-20	Jul-21	Jul-20	Aug-21	Aug-20
BNSF[3]	COT grain units	0	no bids	no bids	no bids	no bids	no bids	no bids	no bids
	COT grain single-car	0	0	0	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.

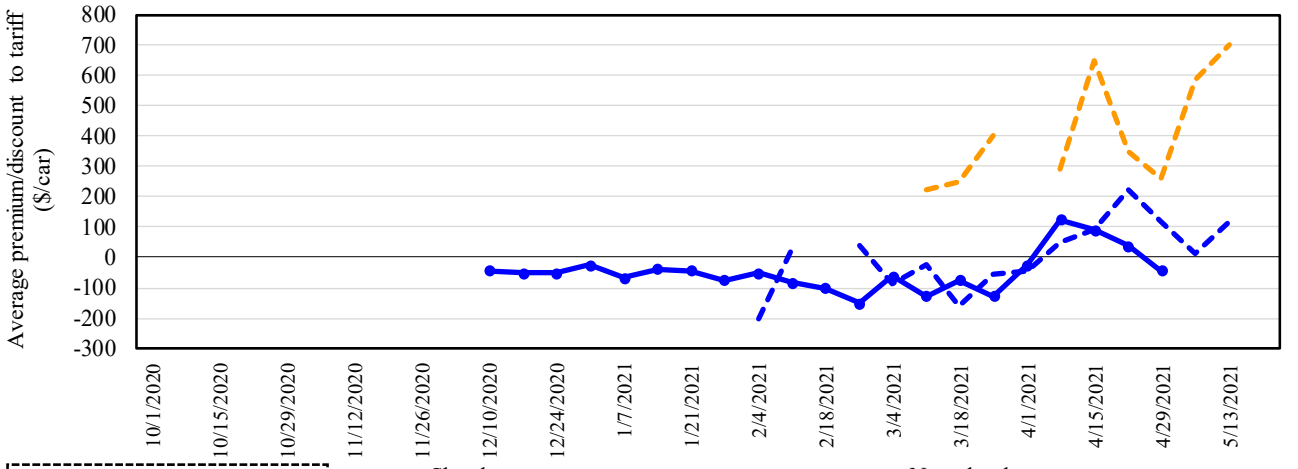
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 May 2021, secondary market

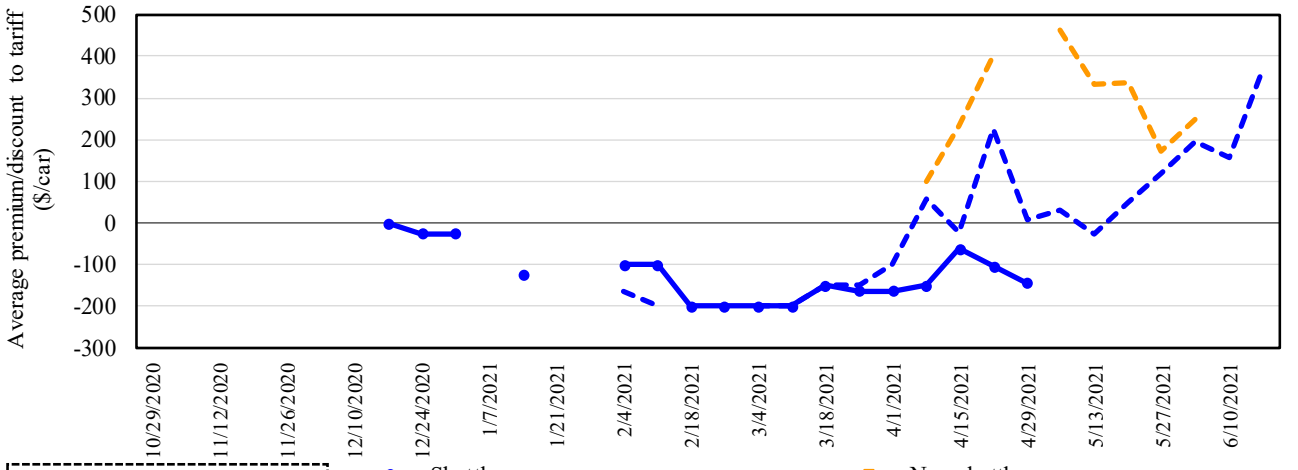


4/29/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$131	$47

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $80 this week and are $167 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 June 2021, secondary market



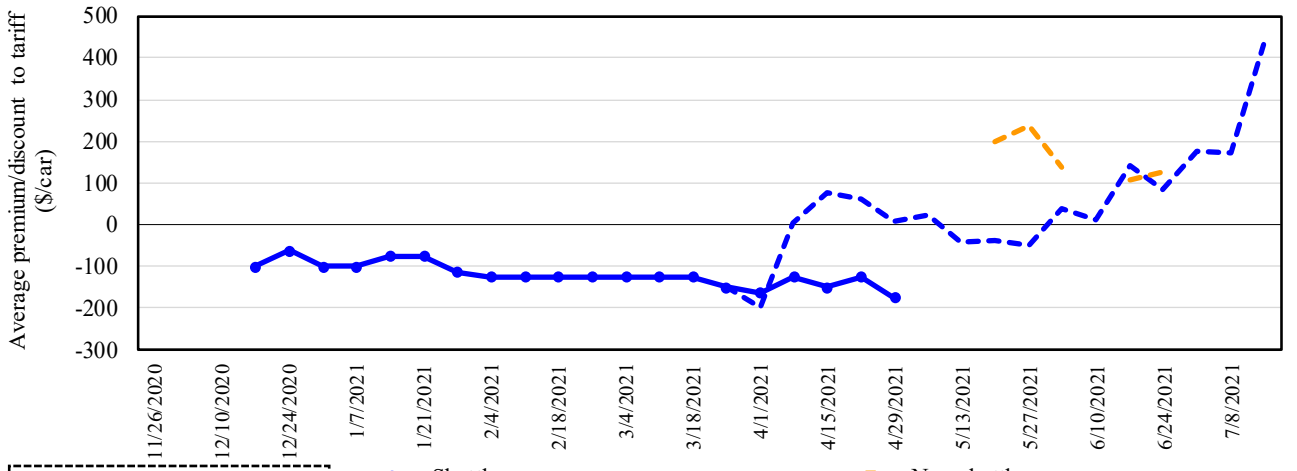
4/29/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$213	-$75

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $41 this week and are $144 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 July 2021, secondary market



4/29/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$200	-$150

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $50 this week and are $113 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: 4/29/2021		Delivery period					
		May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-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**	**(131)**	**(213)**	**(200)**	**(217)**	**(88)**	**1133**
	Change from last week	(81)	(57)	(50)	(17)	(38)	141
	Change from same week 2020	29	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**47**	**(75)**	**(150)**	**(150)**	**(150)**	**700**
	Change from last week	(78)	(25)	(50)	0	0	75
	Change from same week 2020	184	88	n/a	n/a	n/a	800

[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]

May 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	$111	$40.66	$1.11	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	$196	$46.88	$1.28	2
	Sioux Falls, SD	Galveston-Houston, TX	$6,851	$0	$68.03	$1.85	-2
	Colby, KS	Galveston-Houston, TX	$4,801	$215	$49.81	$1.36	2
	Amarillo, TX	Los Angeles, CA	$5,121	$299	$53.82	$1.46	2
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$221	$40.93	$1.04	2
	Toledo, OH	Raleigh, NC	$7,833	$0	$77.79	$1.98	15
	Des Moines, IA	Davenport, IA	$2,455	$47	$24.84	$0.63	2
	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	$138	$40.10	$1.02	4
	Des Moines, IA	Los Angeles, CA	$5,780	$401	$61.38	$1.56	4
Soybeans	Minneapolis, MN	New Orleans, LA	$5,246	$225	$54.33	$1.48	46
	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	$221	$48.32	$1.32	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	$352	$63.20	$1.72	2
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	$221	$40.13	$1.02	2
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,320	$173	$44.62	$1.13	4
	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	$255	$50.95	$1.39	2
	Toledo, OH	Huntsville, AL	$4,945	$0	$49.11	$1.34	3
	Grand Island, NE	Portland, OR	$5,260	$360	$55.81	$1.52	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: May 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	$153	$70.15	$1.91	0
	KS	Guadalajara, JA	$7,471	$663	$83.11	$2.26	3
	TX	Salinas Victoria, NL	$4,347	$93	$45.37	$1.23	1
Corn	IA	Guadalajara, JA	$8,902	$571	$96.79	$2.46	3
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,300	$317	$88.05	$2.23	2
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,665	$309	$81.48	$2.07	2
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$536	$92.80	$2.52	3
	NE	Guadalajara, JA	$9,157	$561	$99.28	$2.70	2
	IA	El Castillo, JA	$9,410	$0	$96.15	$2.61	-1
	KS	Torreon, CU	$8,014	$389	$85.86	$2.33	3
Sorghum	NE	Celaya, GJ	$7,772	$507	$84.59	$2.15	3
	KS	Queretaro, QA	$8,108	$191	$84.80	$2.15	1
	NE	Salinas Victoria, NL	$6,713	$154	$70.16	$1.78	1
	NE	Torreon, CU	$7,092	$357	$76.11	$1.93	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.

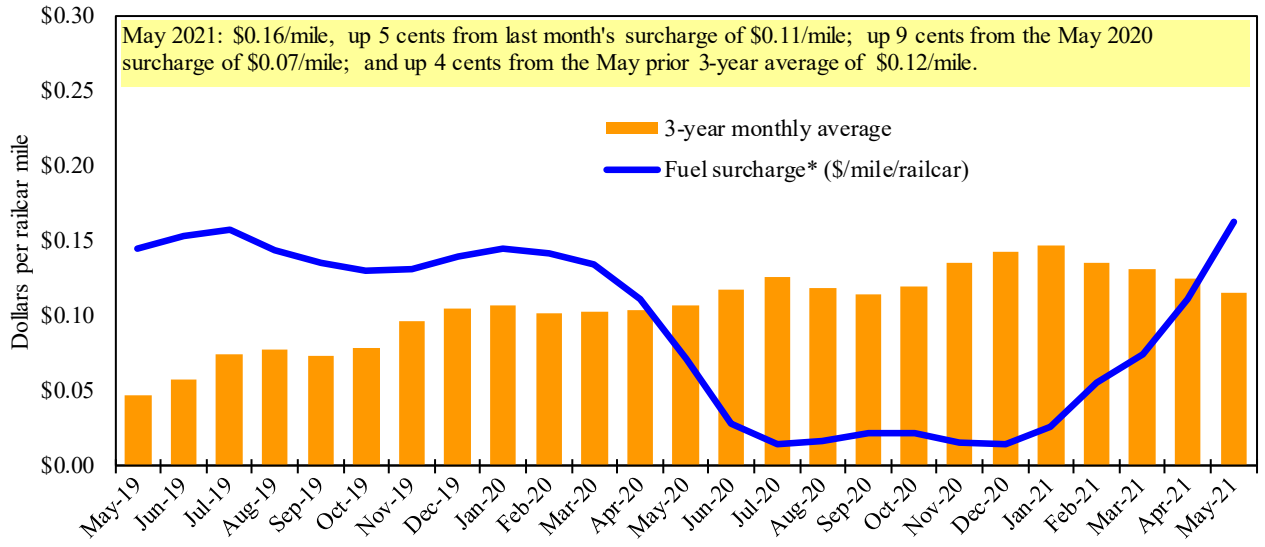
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

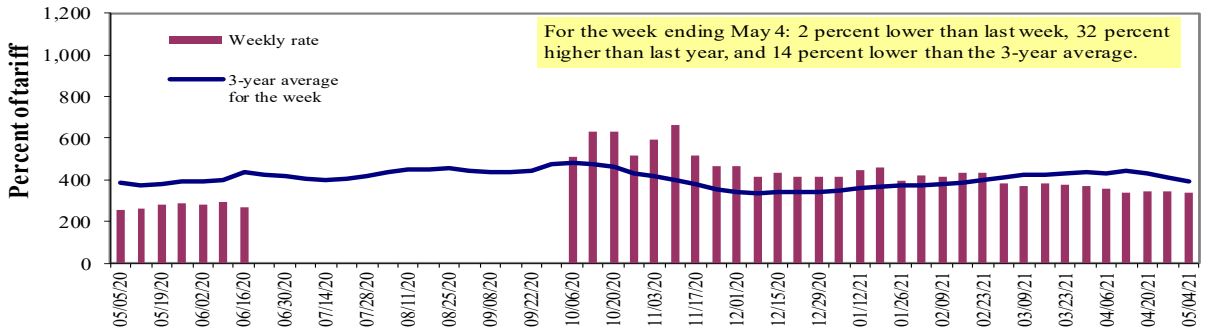
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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]	5/4/2021	431	357	340	243	263	263	220
	4/27/2021	433	350	346	238	271	271	222
$/ton	5/4/2021	26.68	18.99	15.78	9.70	12.33	10.63	6.91
	4/27/2021	26.80	18.62	16.05	9.50	12.71	10.95	6.97
Current week % change from the same week:								
	Last year	34	34	32	38	44	44	32
	3-year avg. [2]	-12	-14	-14	-17	-17	-17	-20
Rate[1]	June	415	341	331	233	258	258	214
	August	416	343	335	250	286	286	265

[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

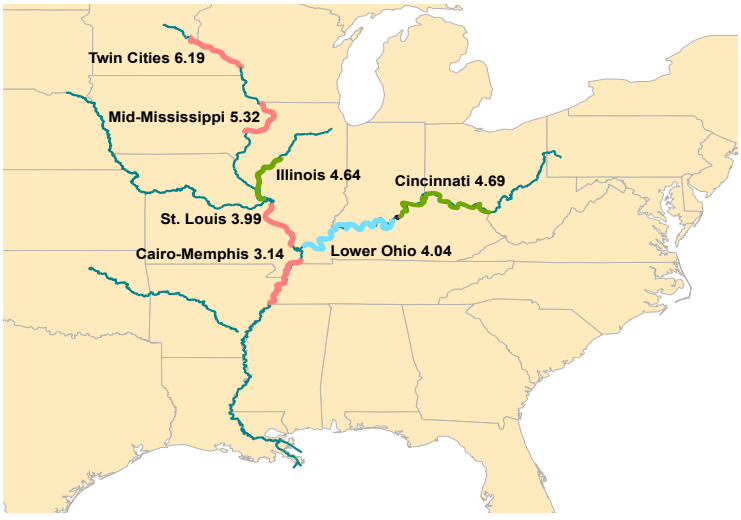
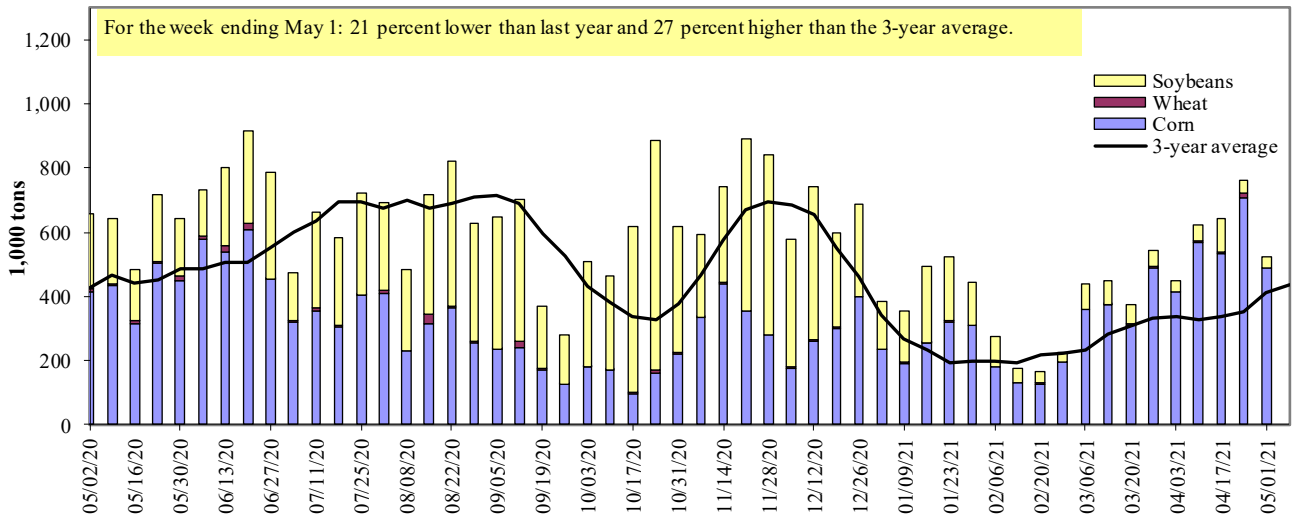


Figure 10

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 05/01/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	274	5	38	0	316
Winfield, MO (L25)	364	2	45	0	411
Alton, IL (L26)	549	2	41	0	591
Granite City, IL (L27)	486	0	35	0	521
Illinois River (La Grange)	184	0	16	0	200
Ohio River (Olmsted)	115	0	9	0	124
Arkansas River (L1)	0	21	6	0	27
Weekly total - 2021	601	21	50	0	672
Weekly total - 2020	383	34	241	5	662
2021 YTD[1]	9,605	371	3,341	126	13,444
2020 YTD[1]	4,786	523	3,577	19	8,905
2021 as % of 2020 YTD	201	71	93	668	151
Last 4 weeks as % of 2020[2]	163	105	43	109	118
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.

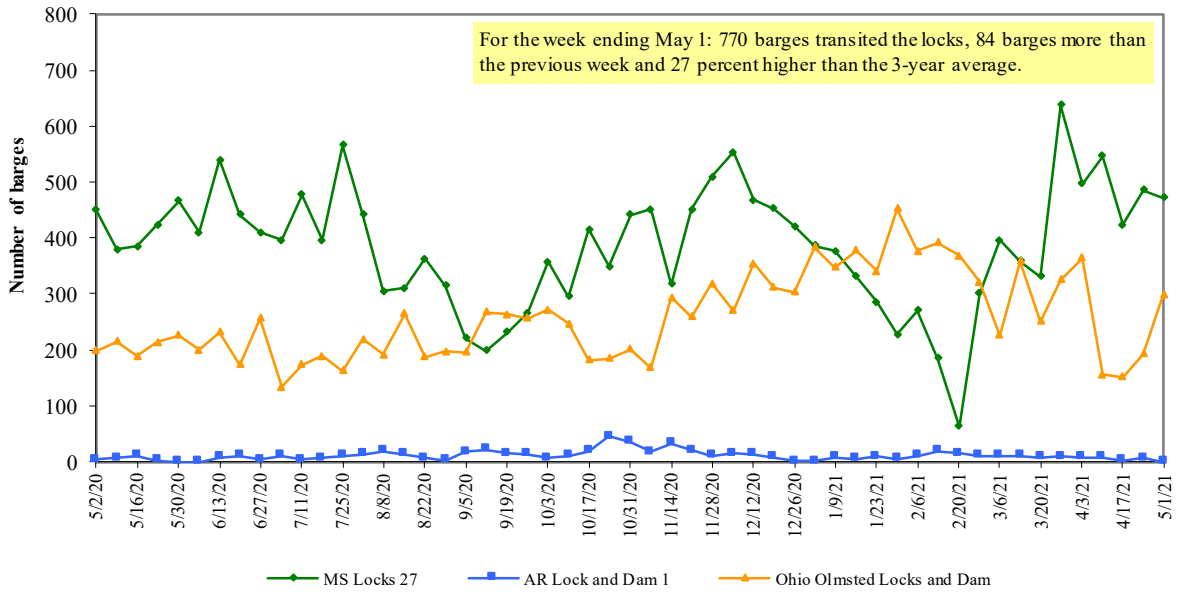
[2] As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility.

Source: U.S. Army Corps of Engineers.

Figure 11

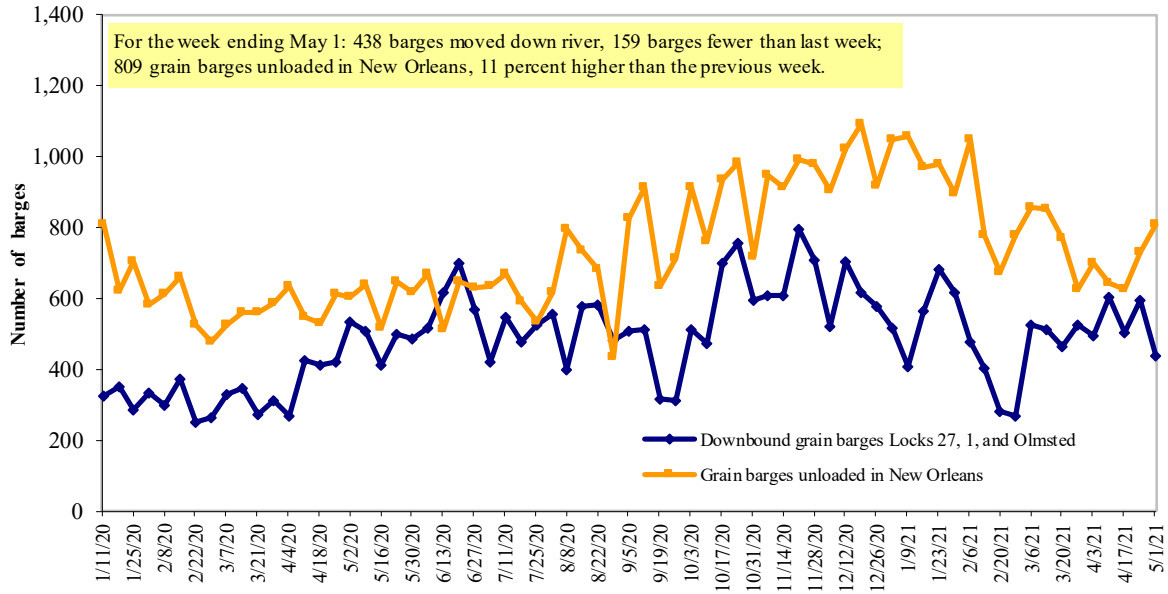
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 5/3/2021 (U.S. $/gallon)

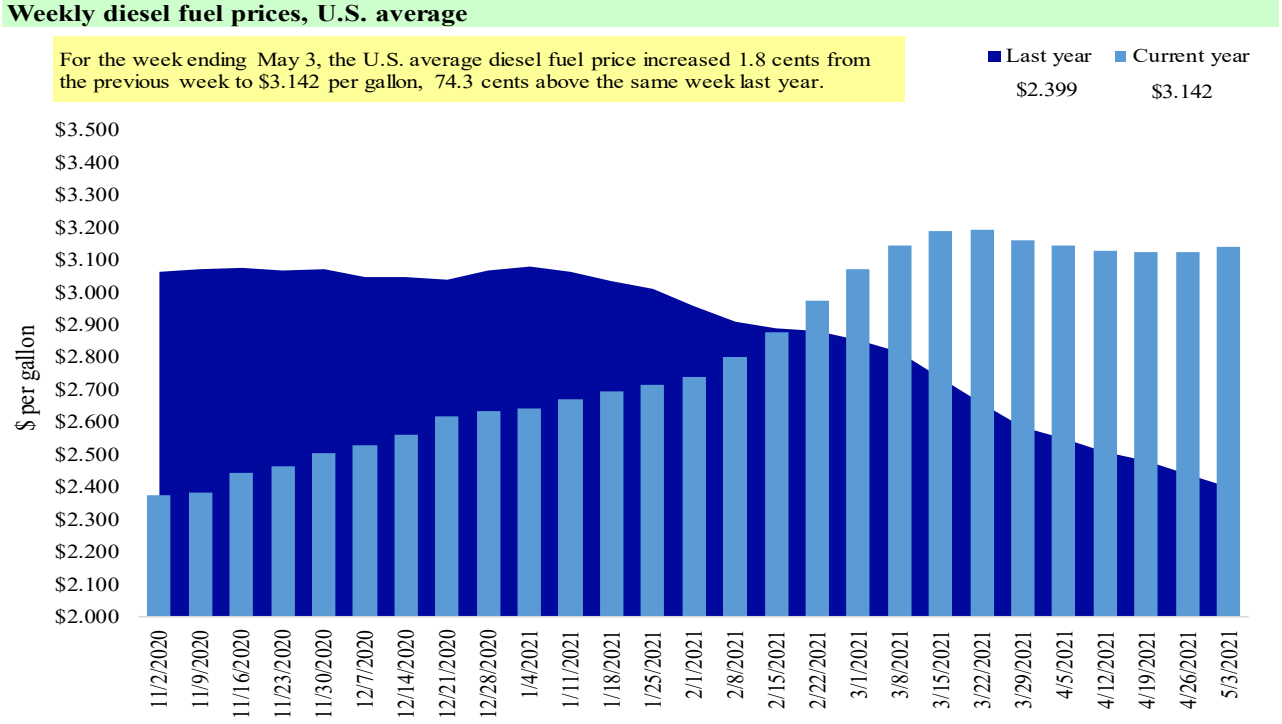
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.113	0.020	0.603
	New England	3.084	0.004	0.432
	Central Atlantic	3.285	0.017	0.597
	Lower Atlantic	3.004	0.024	0.644
II	Midwest	3.085	0.027	0.837
III	Gulf Coast	2.924	0.007	0.755
IV	Rocky Mountain	3.250	0.022	0.880
V	West Coast	3.664	0.013	0.765
	West Coast less California	3.282	0.032	0.737
	California	3.983	-0.003	0.792
Total	United States	3.142	0.018	0.743

[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]									
4/22/2021	1,098	255	1,188	1,084	72	3,696	26,411	5,055	35,162
This week year ago	1,560	200	1,306	875	133	4,075	14,045	5,308	23,428
Cumulative exports-marketing year[2]									
2020/21 YTD	7,627	1,555	6,553	5,568	595	21,897	41,308	56,065	119,270
2019/20 YTD	8,265	2,209	6,281	4,301	802	21,857	22,634	33,593	78,084
YTD 2020/21 as % of 2019/20	92	70	104	129	74	100	183	167	153
Last 4 wks. as % of same period 2019/20*	74	132	98	167	56	104	202	99	162
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 4/22/2021	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	13,578	12,802	6	14,869
Japan	9,530	8,060	18	11,221
Columbia	3,505	3,497	0	4,830
Korea	3,031	1,899	60	4,011
China	23,161	881	2,529	909
Top 5 importers	**52,806**	**27,139**	**95**	**35,840**
Total U.S. corn export sales	**67,720**	**36,679**	**85**	**49,983**
% of projected exports	99%	81%		
Change from prior week[2]	**521**	**1,357**		
Top 5 importers' share of U.S. corn export sales	78%	74%		72%
USDA forecast April 2021	**68,066**	**45,242**	**50**	
Corn use for ethanol USDA forecast, April 2021	**126,365**	**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 4/22/2021	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	35,711	13,252	169	19,106
Mexico	4,679	4,146	13	4,591
Egypt	2,670	2,699	(1)	2,980
Indonesia	1,943	1,681	16	2,360
Japan	1,993	2,133	(7)	2,288
Top 5 importers	**46,996**	**23,911**	**97**	**31,324**
Total U.S. soybean export sales	**61,119**	**38,901**	**57**	**49,352**
% of projected exports	98%	85%		
change from prior week[2]	**293**	**1,078**		
Top 5 importers' share of U.S. soybean export sales	77%	61%		**63%**
USDA forecast, April 2021	**62,125**	**45,831**	**136**	

[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 4/22/2021	Total Commitments 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	3,620	3,785	(4)	3,213
Philippines	3,205	3,386	(5)	2,888
Japan	2,490	2,742	(9)	2,655
Nigeria	1,413	1,568	(10)	1,433
Korea	1,842	1,565	18	1,372
Indonesia	937	1,011	(7)	1,195
Taiwan	1,186	1,442	(18)	1,175
Thailand	808	878	(8)	727
Italy	600	876	(32)	622
Colombia	381	792	(52)	618
Top 10 importers	**16,483**	**18,046**	(9)	**15,897**
Total U.S. wheat export sale	**25,593**	**25,932**	(1)	**23,821**
% of projected exports	95%	99%		
change from prior week[2]	**224**	**467**		
Top 10 importers' share of U.S. wheat export sales	64%	70%		67%
USDA forecast, April 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 04/29/21	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	345	487	71	5,641	5,406	104	109	118	15,966
Corn	682	612	111	7,005	2,614	268	224	140	9,969
Soybeans	3	0	n/a	3,648	2,567	142	5	8	14,028
Total	**1,030**	**1,100**	**94**	**16,294**	**10,587**	**154**	**133**	**119**	**39,963**
Mississippi Gulf									
Wheat	58	68	85	734	1,344	55	68	64	3,422
Corn	1,156	1,093	106	17,430	9,792	178	167	147	28,781
Soybeans	32	182	18	9,367	8,415	111	44	44	38,013
Total	**1,246**	**1,343**	**93**	**27,531**	**19,552**	**141**	**123**	**113**	**70,215**
Texas Gulf									
Wheat	55	16	341	1,158	1,248	93	99	64	4,248
Corn	31	10	301	216	278	78	38	39	723
Soybeans	0	0	n/a	656	7	n/a	n/a	n/a	2,098
Total	**86**	**26**	**326**	**2,030**	**1,533**	**132**	**80**	**59**	**7,068**
Interior									
Wheat	40	41	99	878	840	104	92	112	2,263
Corn	232	197	118	3,123	2,661	117	123	117	8,683
Soybeans	108	103	105	2,384	2,298	104	105	88	7,274
Total	**380**	**341**	**112**	**6,385**	**5,799**	**110**	**113**	**105**	**18,220**
Great Lakes									
Wheat	39	0	n/a	60	130	46	31	36	891
Corn	0	0	n/a	25	0	n/a	n/a	283	111
Soybeans	0	0	n/a	0	8	0	0	0	1,111
Total	**39**	**0**	**n/a**	**84**	**138**	**61**	**47**	**49**	**2,113**
Atlantic									
Wheat	0	0	n/a	72	1	n/a	50	3	65
Corn	0	7	0	14	8	174	174	80	33
Soybeans	8	14	58	975	346	282	95	40	1,870
Total	**8**	**21**	**40**	**1,061**	**355**	**299**	**106**	**42**	**1,968**
U.S. total from ports*									
Wheat	537	612	88	8,542	8,970	95	96	97	26,854
Corn	2,102	1,920	109	27,812	15,352	181	170	139	48,301
Soybeans	151	299	50	17,031	13,642	125	50	50	64,394
Total	**2,789**	**2,830**	**99**	**53,386**	**37,964**	**141**	**121**	**109**	**139,548**

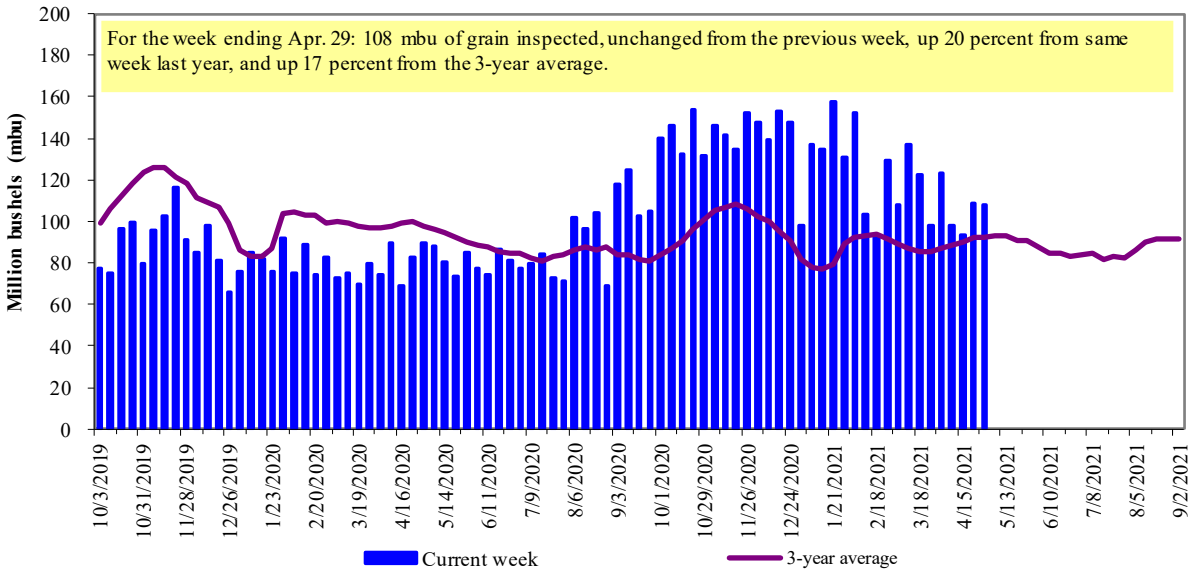
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

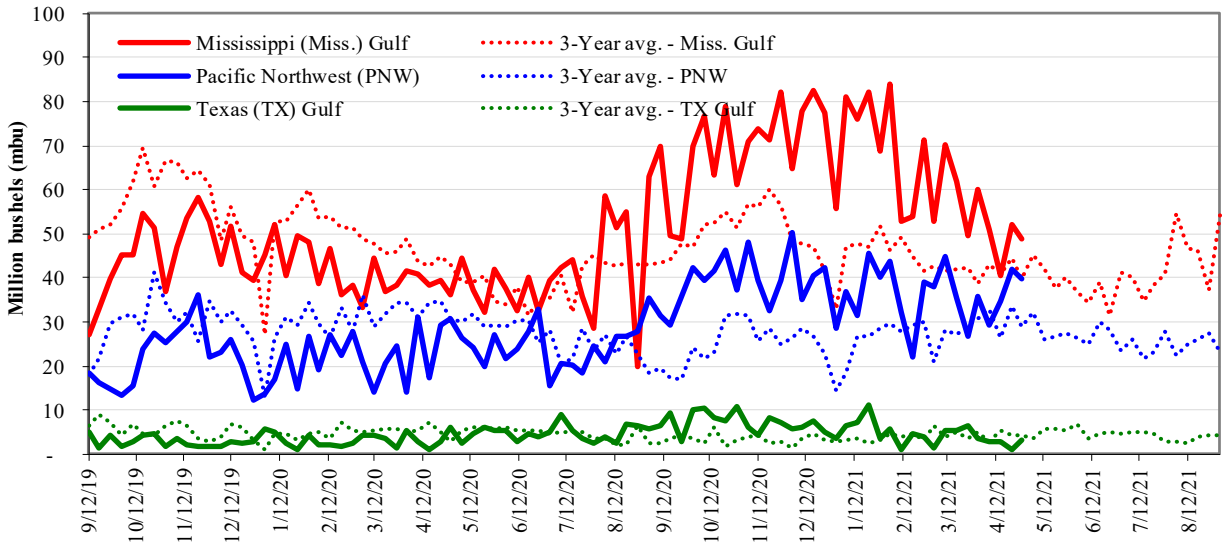


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 04/29/21 inspections (mbu):	
MS Gulf:	48.8
PNW:	39.7
TX Gulf:	3.2

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 7	up 225	down 2	down 6
Last Year (same wk):	up 35	down 47	up 24	up 28
3-yr avg. (4-wk. mov. Avg):	up 16	down 22	up 13	up 30

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

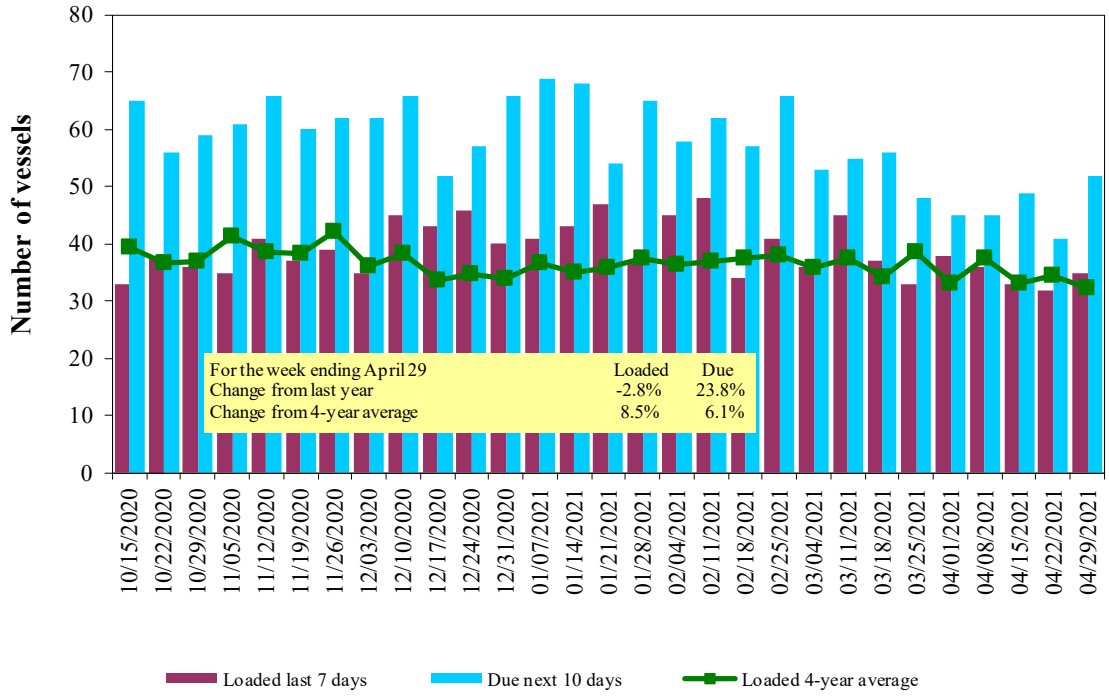
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
4/29/2021	22	35	52	16
4/22/2021	35	32	41	22
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

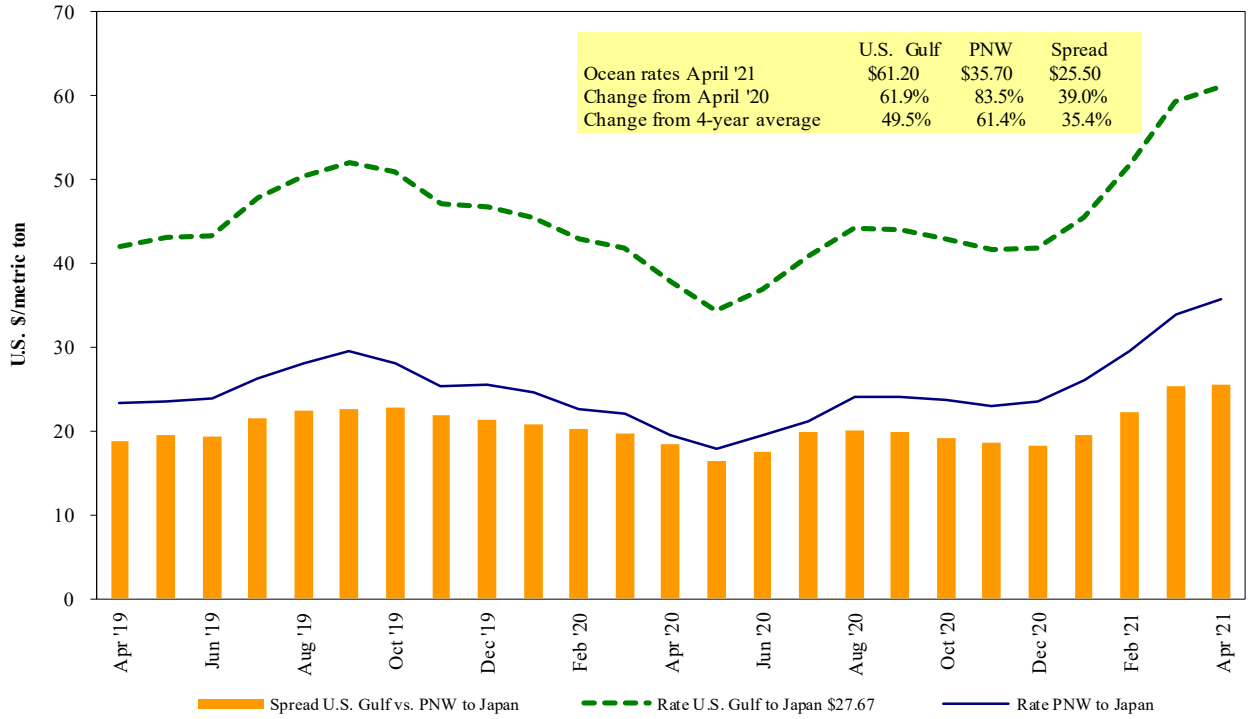
U.S. Gulf[1] vessel loading activity



[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 05/01/2021

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	Sudan	Wheat	May 20/30	48,000	112.75*
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	Wheat	Jun 5/15	50,600	49.30
PNW	Japan	Grain	Mar 5/14	28,000	48.10
PNW	Taiwan	Wheat	May 29/Jun 12	45,665	48.00
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

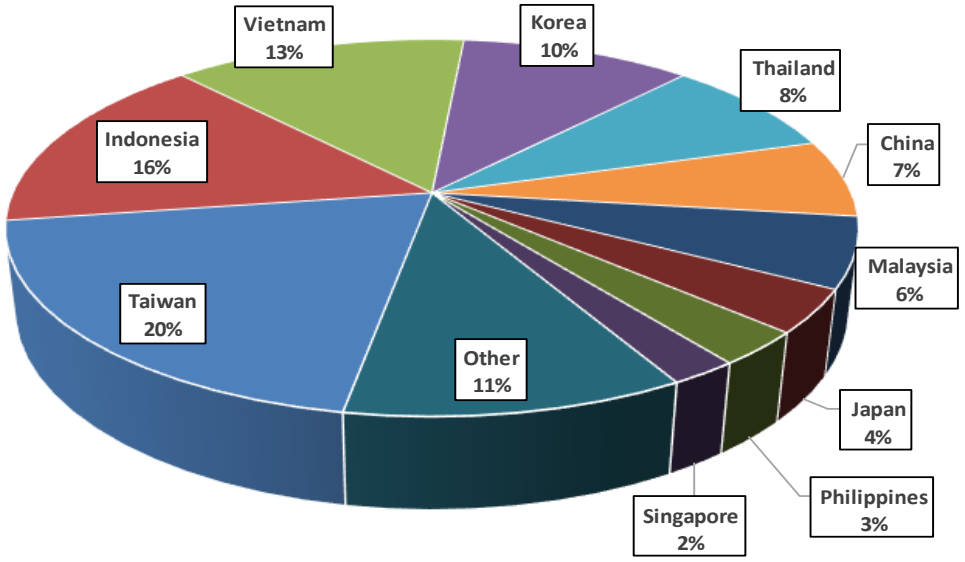
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

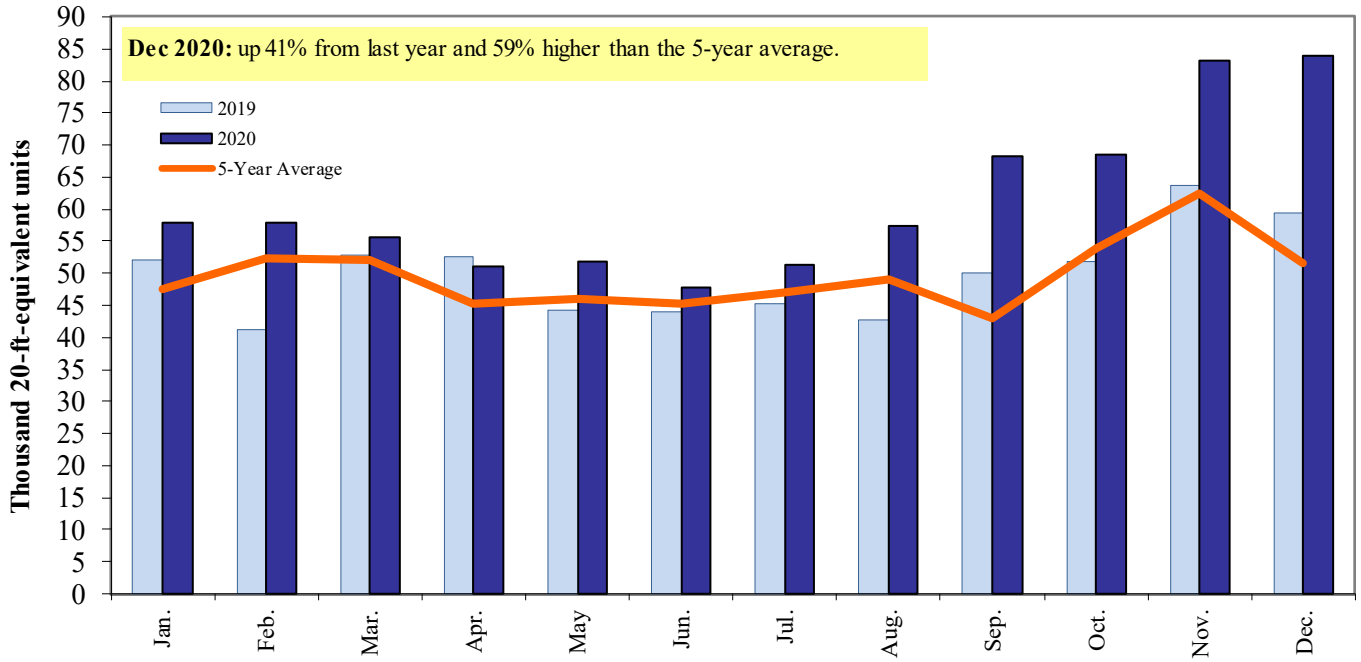
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2020



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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