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 13, 2021

Contents

The next release is May 20, 2021

WEEKLY HIGHLIGHTS

Low Ethanol Stocks May Support Production and Increased Transportation Demand

For the week ending May 7, 2021, the U.S. Energy Information Administration's (EIA) total domestic ethanol stocks were reported at 19.34 million barrels, their lowest level for the week since 2014. Currently, ethanol stocks in three of the five Petroleum Administrations for Defense Districts (PADDs) are at their lowest level since 2016. Ethanol stocks in the West coast region (PADD 5), which includes Nevada and Arizona, are their second lowest level since 2011. Potentially boosted by a need to replenish these stocks, ethanol production is also expected to rise in accord with seasonal patterns, according to EIA data. EIA reports current national ethanol production at 979,000 barrels/day. As the U.S. economy continues to reopen and driving miles increase, domestic ethanol and byproduct production should continue to rise and support truck and rail demand.

Grain Barge Tonnages Reached Record High Last Week

For the week ending May 8, year-to-date (YTD) total barged grain movements reached a record-high 14.5 million tons, 47 percent higher than last year, 33 percent higher than 5-year average, and 38 percent higher than the 10-year average (***GTR* table 10**). The exceptionally high YTD tonnage mostly reflects a high demand for corn exports. At 10.4 million tons, YTD total barged corn movements also set a record. This total was 98 percent higher than last year, 65 percent higher than the 5-year average, and 77 percent higher than the 10-year average. A couple of factors contributed to the high grain and corn totals: First, water conditions that had complicated barge logistics earlier this year have substantially improved. Second, the Asian market, especially China, has shown a continuously strong demand for imported grain.

Closure of I-40 Bridge Shuts Down Barge Traffic on Mississippi River

According to the Tennessee Department of Transportation (TDOT), beginning May 11 the I-40 Hernando DeSoto bridge was closed, after a routine inspection revealed a crack on the bottom of the bridge truss. As of May 13, both highway traffic over the bridge and river traffic under the bridge continue to be shut down until further notice. Contract crews must investigate the extent of the crack and make emergency repairs. It is unclear how long the repairs will take. Currently, vehicular traffic is being rerouted, and Coast Guard officials are working with barge operators to determine the safest alternative to resume barge traffic.

Snapshots by Sector

Export Sales

For the week ending April 29, **unshipped balances** of wheat, corn, and soybeans totaled 32.3 million metric tons (mmt). This was 8-percent lower than last week, but 42 percent higher than the same time last year. Net **corn export sales** were 0.137 mmt, down 74 percent from the past week. Net **soybean export sales** were 0.165 mmt, down 44 percent from the previous week. Net weekly **wheat export sales** were -0.096 mmt, down significantly from the previous week.

Rail

U.S. Class I railroads originated 28,097 **grain carloads** during the week ending May 1. This was a 10-percent increase from the previous week, 24 percent more than last year, and 22 percent more than the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were $96 below tariff for the week ending May 6. This was $54 less than last week and $117 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending May 8, **barge grain movements** totaled 1,004,586 tons. This was 50 percent more than the previous week and 18 percent more than the same period last year.

For the week ending May 8, 633 grain barges **moved down river**—195 more barges than the previous week. There were 765 grain barges **unloaded in New Orleans**, 5 percent less than the previous week.

Ocean

For the week ending May 6, 30 **oceangoing grain vessels** were loaded in the Gulf—9 percent fewer than the same period last year. Within the next 10 days (starting May 7), 51 vessels were expected to be loaded—21 percent more than the same period last year.

As of May 6, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $65.00. This was 3 percent more than the previous week. The rate from the Pacific Northwest (PNW) to Japan was $38.00 per mt, 4 percent more than the previous week.

Fuel

For the week ending May 10, the U.S. average **diesel fuel price** increased 4.4 cents from the previous week to $3.186 per gallon, 79.2 cents above the same week last year.

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Feature Article/Calendar

Transportation Costs and Farm Prices Pushed Up Grain Landed Cost to Mexico in First Quarter 2021

Given Mexico's status as a nearby, major importer of U.S. grain, the United States has a vested interest in sustaining low transportation and landed costs for U.S.-Mexico routes. Efficient costs for shipping U.S. grain to Mexico help sustain the competitiveness of U.S. grain in Mexico, as well as globally. As of April 22, 2021, Mexico's total commitments for marketing year 2020/21 were 13.58 million metric tons (mmt) of U.S. corn (***GTR* table 13**), 4.68 mmt of U.S. soybeans (***GTR* table 14**), and 3.62 mmt of U.S. wheat (***GTR* table 15**). U.S. grain is transported to Mexico either by cross-border land movements or by seaborne movements to Mexican ports for inland distribution. This article examines the costs of transporting U.S. grain to Mexico over land to Guadalajara (land routes) and by sea to Veracruz (water routes), tracking changes over time (see table).

Table 1. Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico

	Water route (to Veracruz) $/metric ton					Land route (to Guadalajara) $/metric ton				
	2020 1st qtr.	2020 4th qtr.	2021 1st qtr.	Percent change Yr. to yr.	Qtr. to qtr.	2020 1st qtr.	2020 4th qtr.	2021 1st qtr.	Percent change Yr. to yr.	Qtr. to qtr.
Corn										
Origin			**IL**					**IA**		
Truck	10.70	11.38	13.66	27.7	20.0	4.62	4.85	4.88	5.6	0.6
Rail [1]						96.35	94.04	95.30	-1.1	1.3
Barge[2]	15.55	25.88	20.87	34.2	-19.4					
Ocean[3]	13.64	14.43	19.19	40.7	33.0					
Total transportation cost	39.89	51.69	53.72	34.7	3.9	100.97	98.89	100.18	-0.8	1.3
Farm value[4]	138.05	147.50	180.44	30.7	22.3	146.45	150.65	185.82	26.9	23.3
Landed cost[5]	177.94	199.19	234.16	31.6	17.6	247.42	249.54	286.00	15.6	14.6
Transport % of landed cost	22	26	23			41	40	35		
Soybeans										
Origin			**IL**					**NE**		
Truck	10.70	11.38	13.66	27.7	20.0	4.62	4.85	4.88	5.6	0.6
Rail						98.97	96.55	97.77	-1.2	1.3
Barge	15.55	25.88	20.87	34.2	-19.4					
Ocean	13.64	14.43	19.19	40.7	33.0					
Total transportation cost	39.89	51.69	53.72	34.7	3.9	103.59	101.40	102.65	-0.9	1.2
Farm value	325.55	370.25	442.15	35.8	19.4	307.30	368.05	445.82	45.1	21.1
Landed cost	365.44	421.94	495.87	35.7	17.5	410.89	469.45	548.47	33.5	16.8
Transport % of landed cost	11	12	11			25	22	19		
Wheat										
Origin			**KS**					**KS**		
Truck	4.62	4.85	4.88	5.6	0.6	4.62	4.85	4.88	5.6	0.6
Rail	43.31	42.07	42.07	-2.9	0.0	83.27	80.17	81.72	-1.9	1.9
Ocean	13.64	14.43	19.19	40.7	33.0					
Total transportation cost	61.57	61.35	66.14	7.4	7.8	87.89	85.02	86.60	-1.5	1.9
Farm value	160.81	193.39	215.20	33.8	11.3	160.81	193.39	215.20	33.8	11.3
Landed cost	222.38	254.74	281.34	26.5	10.4	248.70	278.41	301.80	21.4	8.4
Transport % of landed cost	28	24	24			35	31	29		

[1]Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table.

[2]Due to the closure of several lock and dam facilities on Illinois River between July 1 and October 27, 2020, mid-Mississippi barge rate was substituted for Illinois rate as the benchmark for calculating cost index during the closures.

[3]Source for ocean freight rates: O'Neil Commodity Consulting.

[4]Source for farm values: USDA, National Agricultural Statistics Service.

[5]Landed cost is total transportation cost plus farm value.

Note: Total may not add exactly because of rounding.

Source: Compiled by the USDA, Agricultural Marketing Service.

Quarter-to-quarter transportation costs. Total transportation costs for U.S. corn, soybeans, and wheat increased from fourth quarter 2020 to first quarter 2021. By the water routes, shipping costs increased with higher truck and ocean freight

rates.[1] After major economies started reopening in January and February, strong trade of both grain and iron ore drove the increase in ocean freight rates for shipping bulk commodities (*GTR*, April 15, 2021). By the land routes, shipping costs rose slightly with higher rates for truck and rail (public tariff, plus fuel surcharge). Truck rates rose partly because of higher diesel fuel prices (***GTR* figure 13**). Rail rates increased partly because of rising fuel surcharges (***GTR* figure 7**).

Year-to-year transportation costs. From first quarter 2020 to first quarter 2021, higher truck, barge, and ocean rates drove rising total costs of shipping U.S. corn, soybeans, and wheat to Mexico by the water routes. Meanwhile, by the land routes, lower rail tariff rates pushed down costs of shipping all grain (corn, soybeans, and wheat) to Mexico.

Quarter-to-quarter landed costs. From quarter to quarter, landed costs increased for all grain shipped via both routes. For both the land and water routes, landed costs rose with higher transport costs and higher farm values (table 1 and figs. 1 and 2). The transportation share of landed costs ranged from 11 percent to 24 percent for the water routes and from 19 percent to 35 percent for land routes (see table).

Year-to-year landed costs. From year to year, landed costs increased for waterborne corn, soybeans, and wheat because of higher transportation costs and farm values. For all grains shipped by land routes, rising landed costs were mainly driven by higher farm values.

U.S. Exports to Mexico. According to USDA's Federal Grain Inspection Service, Mexico imported 3.29 mmt of U.S. corn, 1.23 mmt of U.S. soybeans, and 0.79 mmt of U.S. wheat in first quarter 2021. Quarter to quarter, U.S. inspections for export to Mexico declined 4 percent for corn and 14 percent for soybeans, but increased 17 percent for wheat. Year to year, U.S. inspections destined to Mexico rose 5 percent for corn, 10 percent for soybeans, and 4 percent for wheat.

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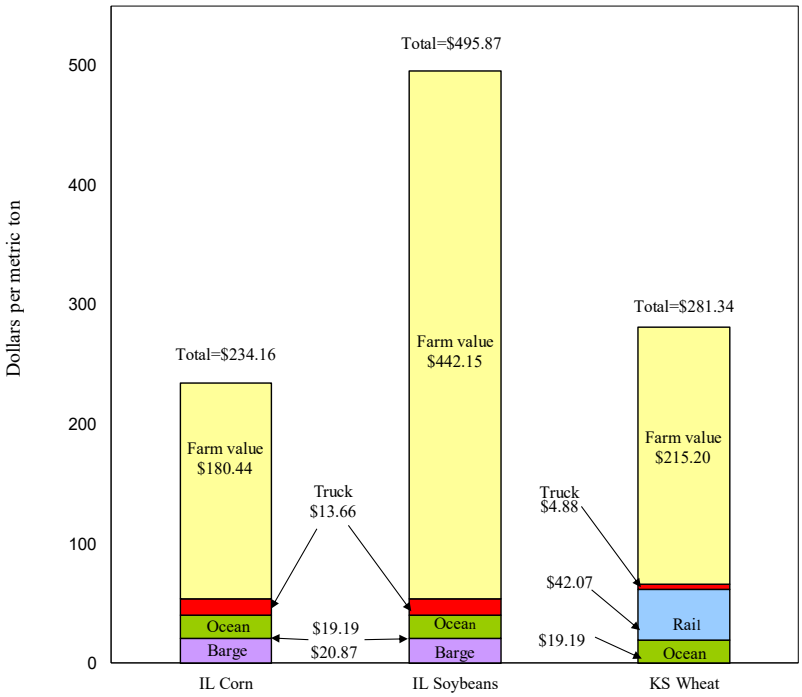
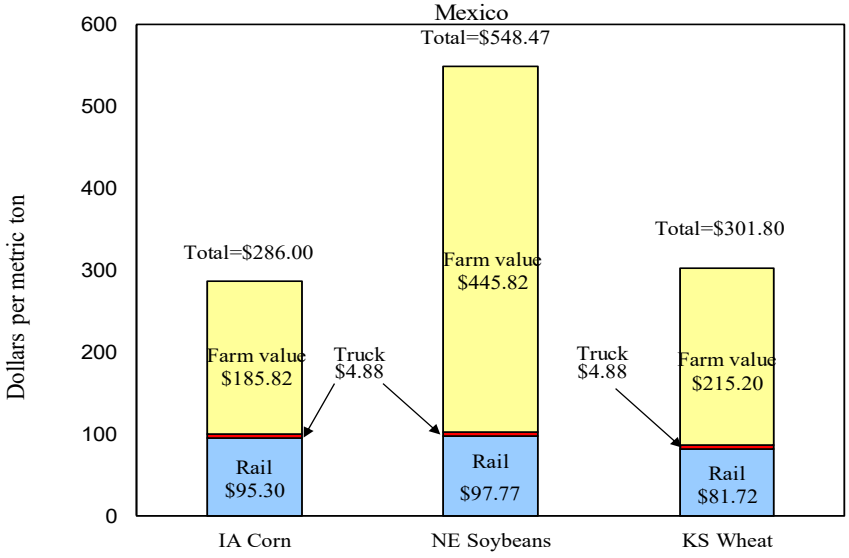
Figure 1. Fourth-quarter water-route landed costs to Veracruz, Mexico



Note: IL = Illinois; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Figure 2. Fourth-quarter land-route landed costs to Guadalajara, Mexico



Note: IA = Iowa; NE = Nebraska; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

[1] Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
05/12/21	214	297	219	216	291	270
05/05/21	211	297	221	189	282	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)

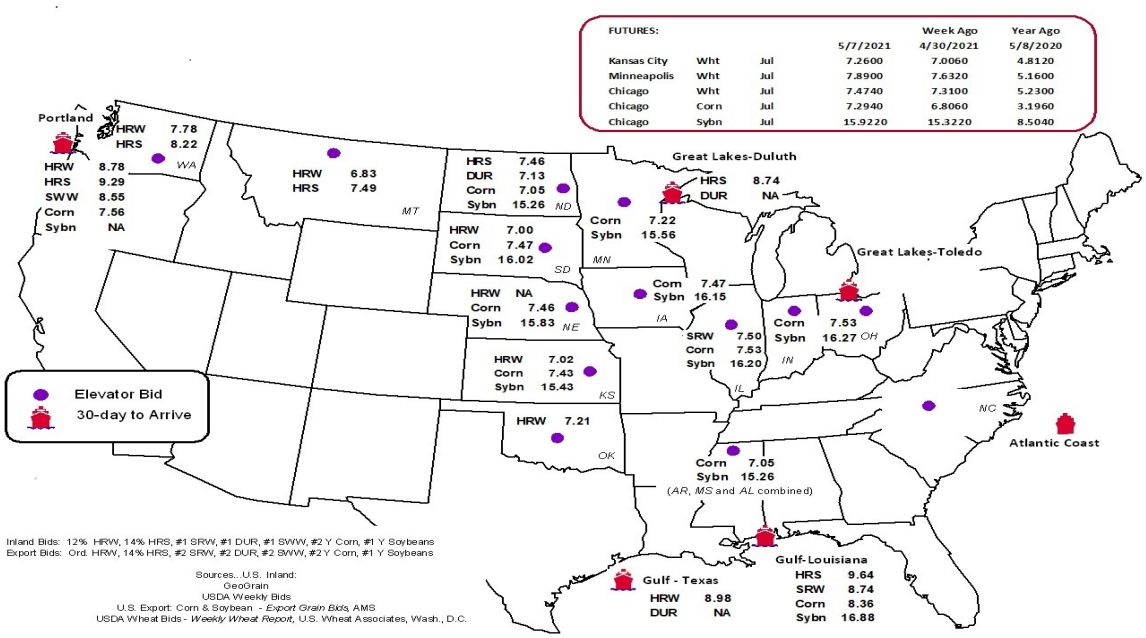
Commodity	Origin–destination	5/7/2021	4/30/2021
Corn	IL–Gulf	-0.83	-1.14
Corn	NE–Gulf	-0.90	-1.08
Soybean	IA–Gulf	-0.73	-0.82
HRW	KS–Gulf	-1.96	-1.98
HRS	ND–Portland	-1.83	-1.93

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
Source: USDA, Agricultural Marketing Service.

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

Grain bid summary



Rail Transportation

Table 3

Rail deliveries to port (carloads)[1]

For the week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-border Mexico[3]
5/05/2021[p]	1,184	1,268	6,864	198	9,514	5/1/2021	2,769
4/28/2021[r]	750	1,667	7,909	259	10,585	4/24/2021	3,235
2021 YTD[r]	29,983	30,337	122,206	9,579	192,105	2021 YTD	46,467
2020 YTD[r]	7,438	13,157	81,939	3,790	106,324	2020 YTD	42,294
2021 YTD as % of 2020 YTD	403	231	149	253	181	% change YTD	110
Last 4 weeks as % of 2020[2]	157	138	119	112	125	Last 4wks. % 2020	131
Last 4 weeks as % of 4-year avg.[2]	209	111	116	55	118	Last 4wks. % 4 yr.	117
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.

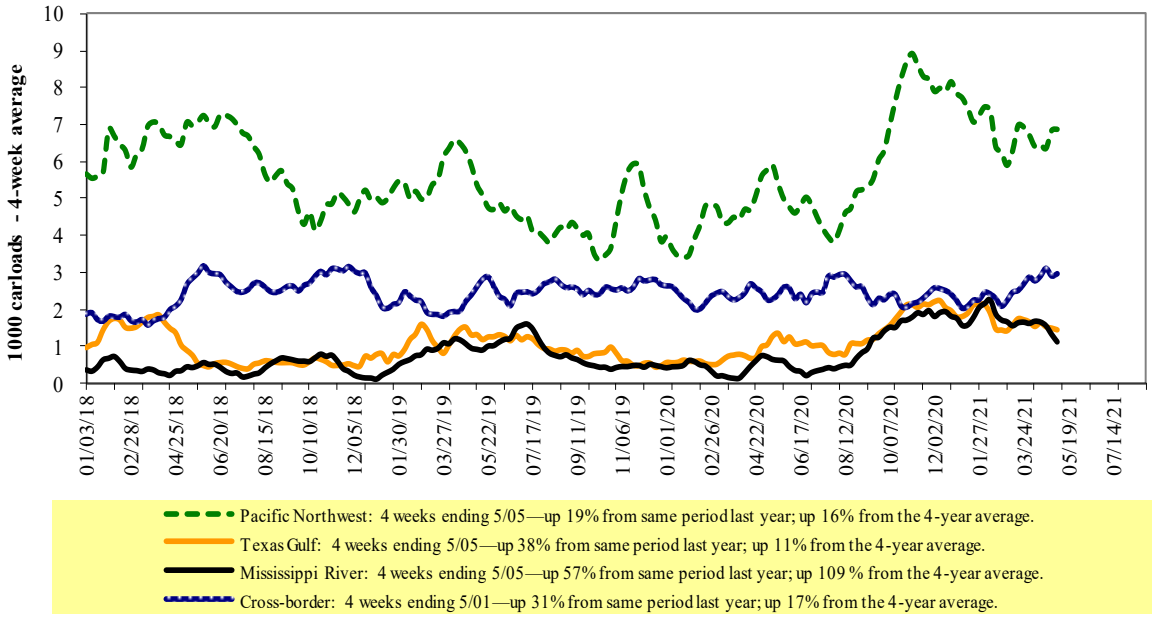
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
5/1/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,366	2,219	14,774	1,680	7,058	28,097	5,099	6,371
This week last year	2,065	2,565	11,462	876	5,681	22,649	5,221	5,098
2021 YTD	34,400	43,760	224,489	18,160	112,475	433,284	84,192	93,240
2020 YTD	31,215	41,633	191,581	18,864	85,645	368,938	68,459	75,059
2021 YTD as % of 2020 YTD	110	105	117	96	131	117	123	124
Last 4 weeks as % of 2020*	105	108	120	130	126	120	108	118
Last 4 weeks as % of 3-yr. avg.**	96	94	112	121	124	112	106	126
Total 2020	91,659	130,755	613,630	57,782	296,701	1,190,527	238,897	261,778

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

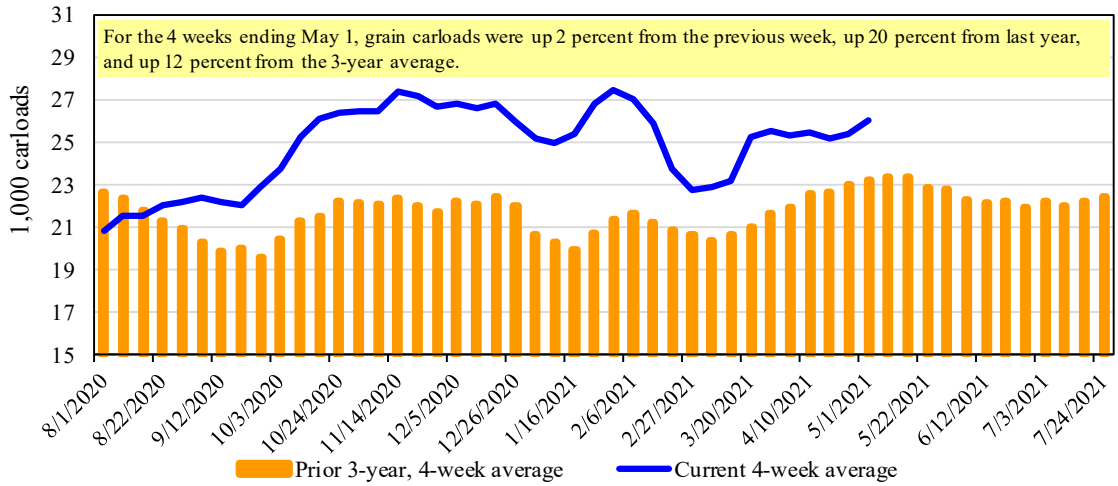
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
5/6/2021		May-21	May-20	Jun-21	Jun-20	Jul-21	Jul-20	Aug-21	Aug-20
BNSF[3]	COT grain units	no offer	no bids	4	0	no bids	no bids	0	0
	COT grain single-car	no offer	0	0	0	0	0	0	no bids
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.

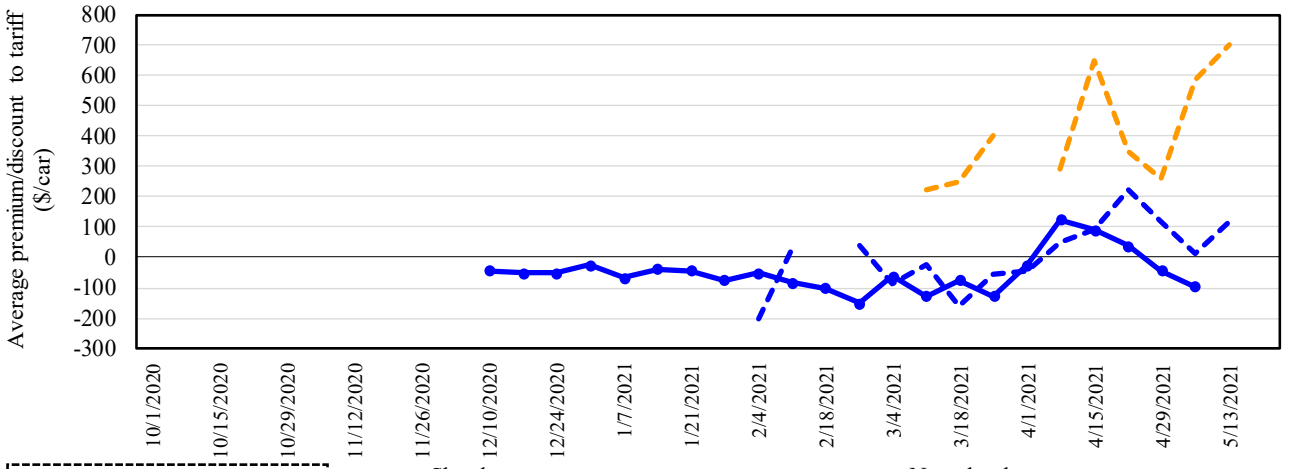
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

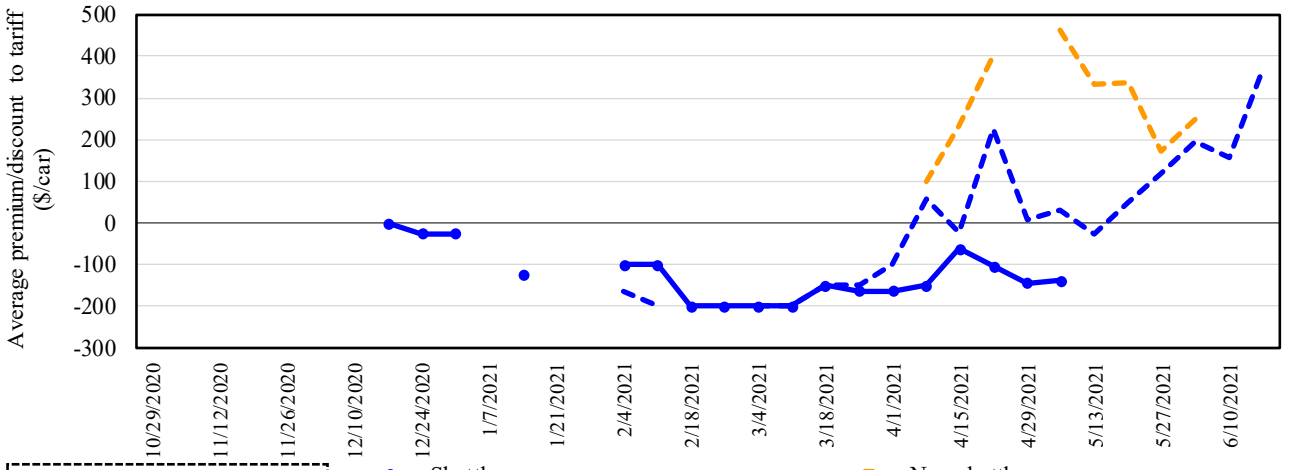


5/6/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$67	-$125

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $54 this week and are $221 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



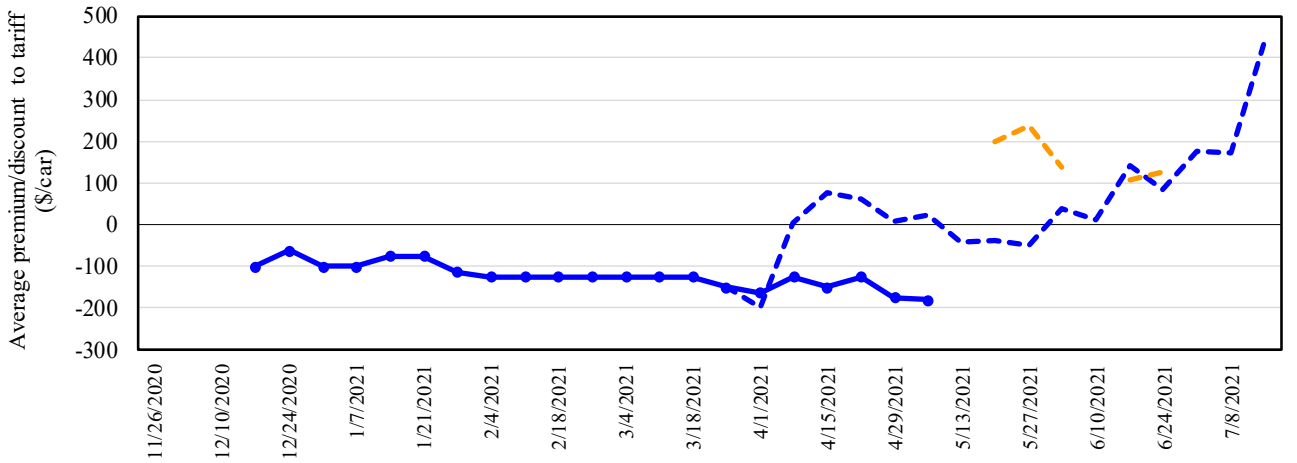
5/6/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$175	-$100

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $6 this week and are $138 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



5/6/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$213	-$150

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $6 this week and are $119 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: 5/6/2021		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**	**(67)**	**(175)**	**(213)**	**(250)**	**288**	**1117**
	Change from last week	64	38	(13)	(33)	376	(16)
	Change from same week 2020	233	n/a	n/a	n/a	n/a	892
	UP-Pool	**(125)**	**(100)**	**(150)**	**(150)**	**(150)**	**650**
	Change from last week	(172)	(25)	0	0	0	(50)
	Change from same week 2020	0	n/a	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]

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.

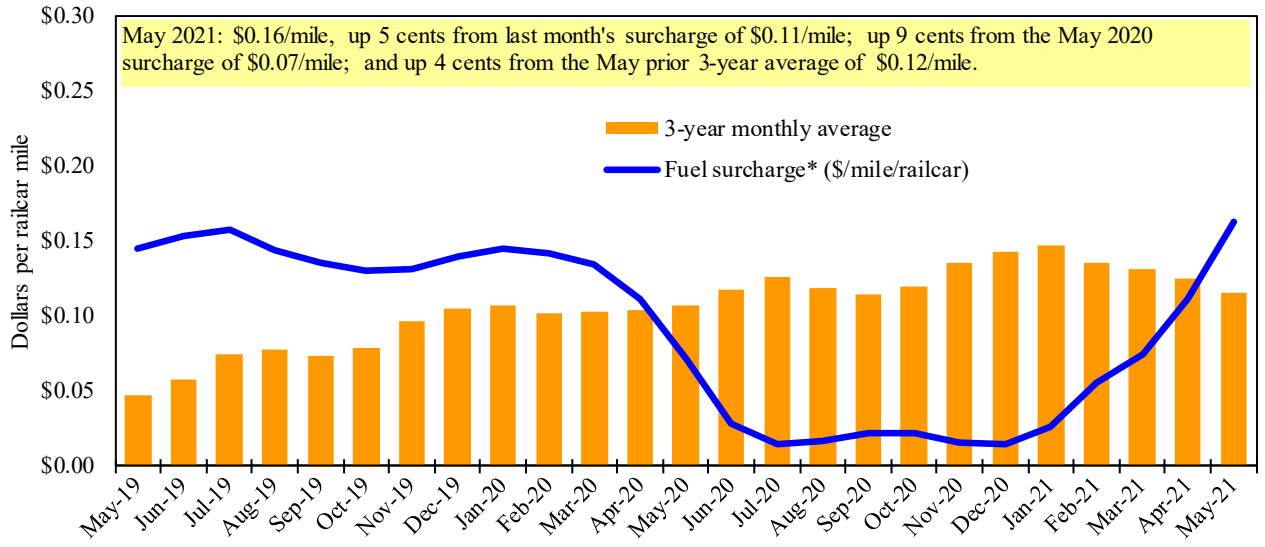
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

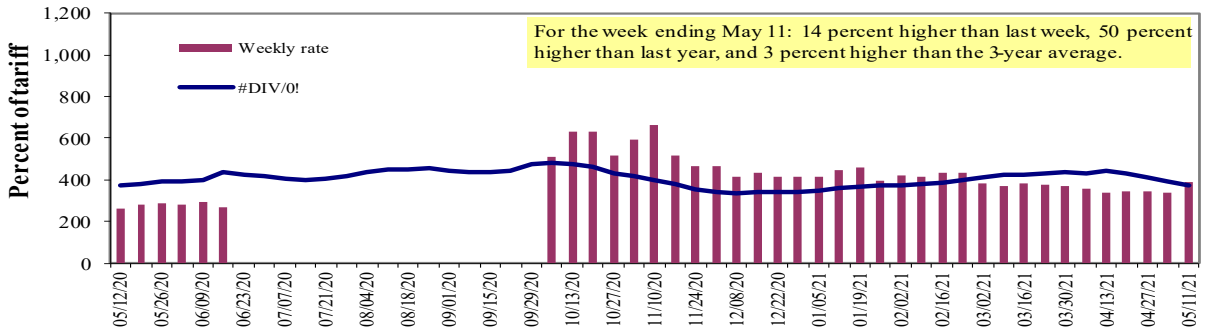
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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

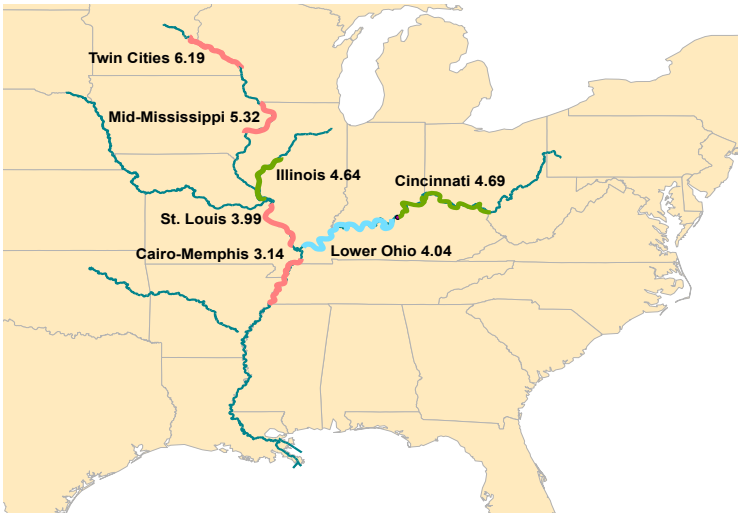
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	5/11/2021	457	394	388	267	261	261	234
	5/4/2021	431	357	340	243	263	263	220
$/ton	5/11/2021	28.29	20.96	18.00	10.65	12.24	10.54	7.35
	5/4/2021	26.68	18.99	15.78	9.70	12.33	10.63	6.91
Current week % change from the same week:								
	Last year	44	50	50	50	48	48	41
	3-year avg. [2]	3	4	3	-2	-12	-12	-9
Rate[1]	June	430	378	344	245	259	259	223
	August	414	352	345	268	308	308	274

[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

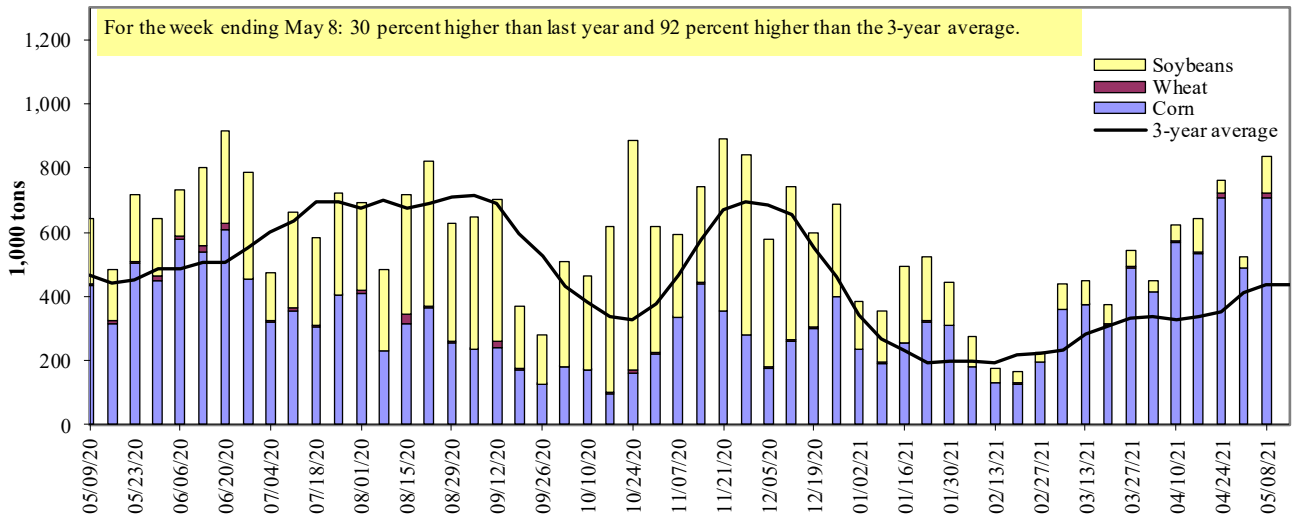
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 05/08/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	196	2	13	3	214
Winfield, MO (L25)	421	5	90	13	528
Alton, IL (L26)	681	13	126	13	832
Granite City, IL (L27)	709	14	112	13	848
Illinois River (La Grange)	201	8	13	0	222
Ohio River (Olmsted)	116	4	14	0	134
Arkansas River (L1)	0	8	14	0	22
Weekly total - 2021	826	26	140	13	1,005
Weekly total - 2020	482	35	322	11	850
2021 YTD[1]	10,431	398	3,481	138	14,448
2020 YTD[1]	5,268	558	3,899	30	9,755
2021 as % of 2020 YTD	198	71	89	463	148
Last 4 weeks as % of 2020[2]	161	106	40	90	116
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.

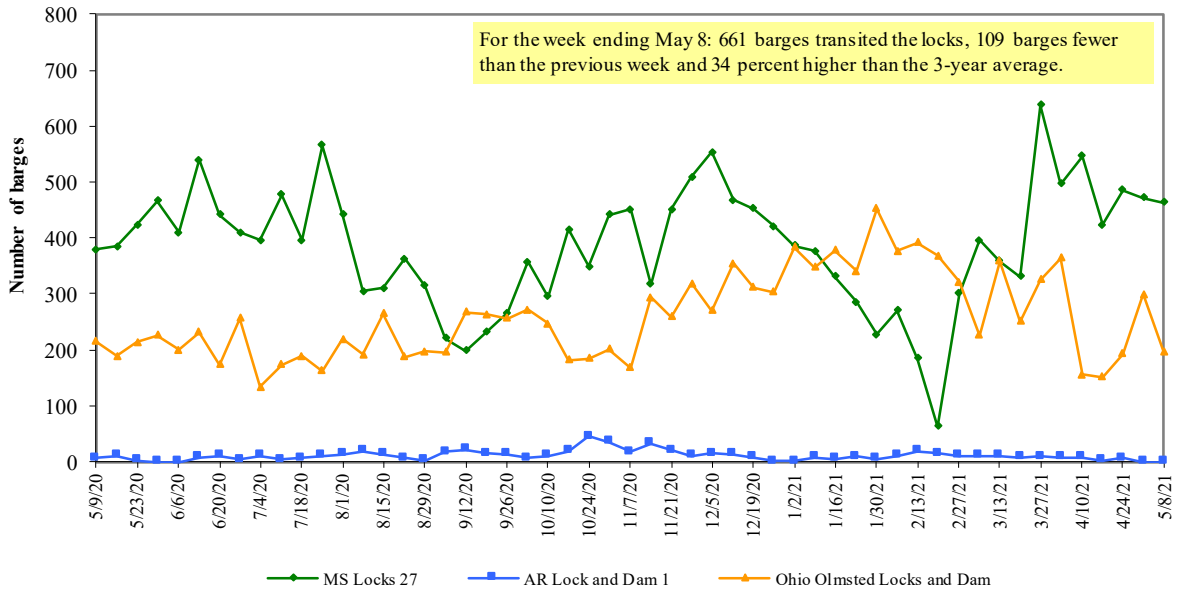
[2] As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

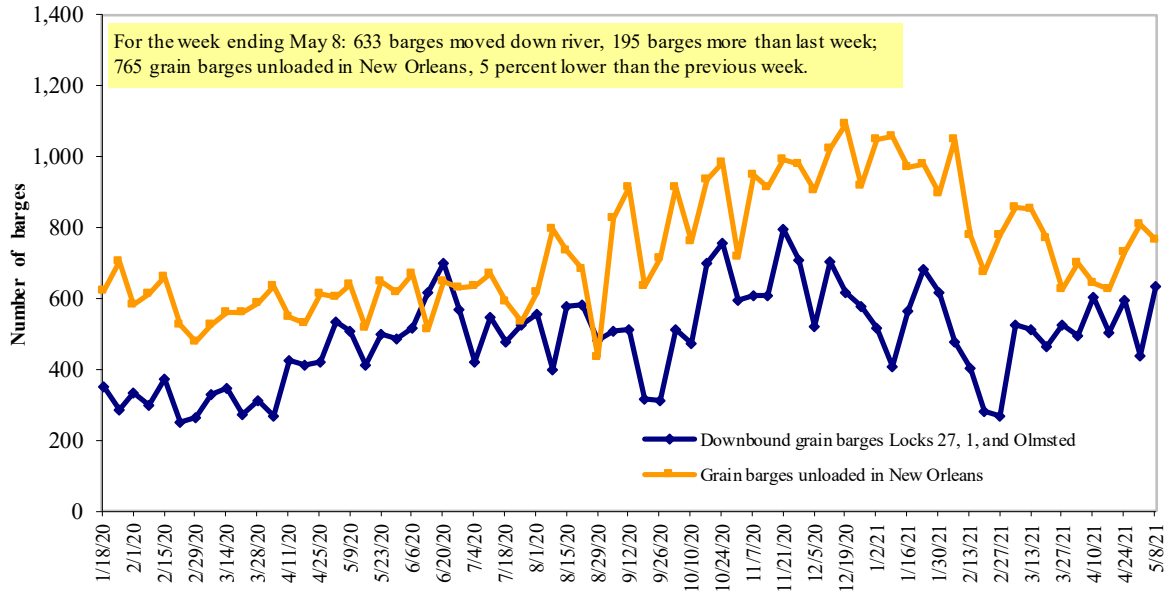
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 5/10/2021 (U.S. $/gallon)

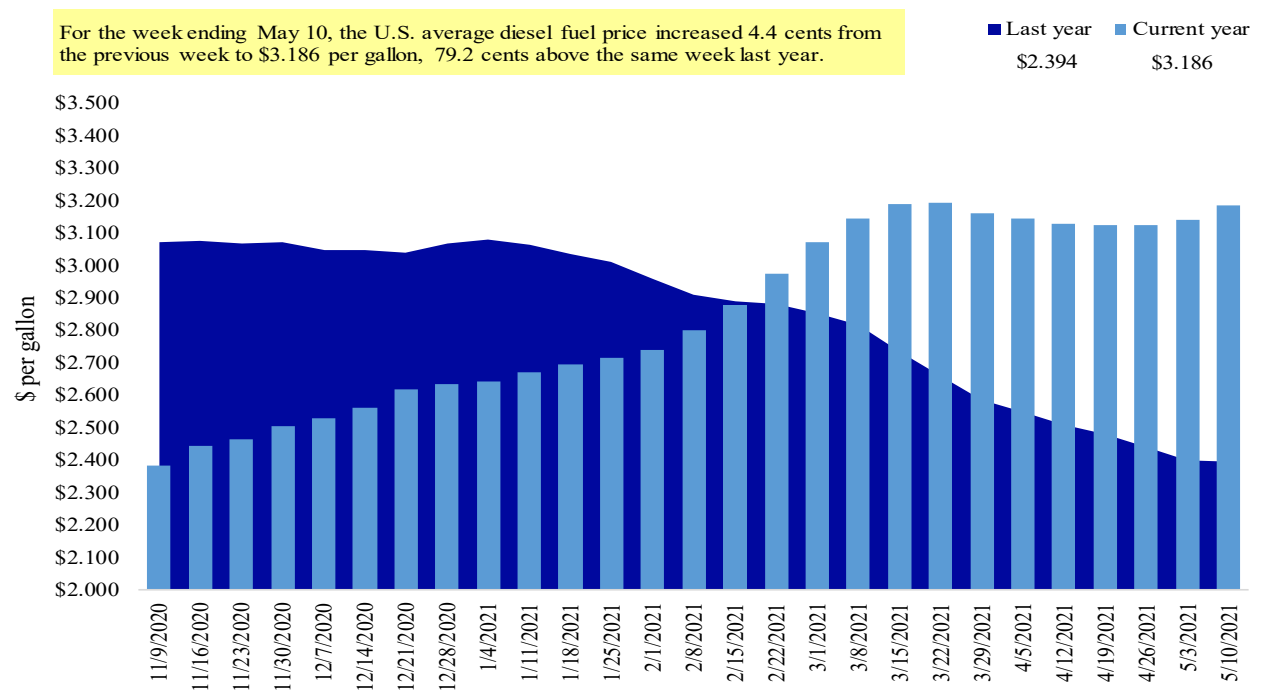
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.160	0.047	0.662
	New England	3.115	0.031	0.485
	Central Atlantic	3.336	0.051	0.656
	Lower Atlantic	3.051	0.047	0.703
II	Midwest	3.130	0.045	0.890
III	Gulf Coast	2.968	0.044	0.790
IV	Rocky Mountain	3.307	0.057	0.961
V	West Coast	3.692	0.028	0.792
	West Coast less California	3.313	0.031	0.756
	California	4.008	0.025	0.826
Total	United States	3.186	0.044	0.792

[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]									
4/29/2021	922	235	910	878	70	3,015	24,354	4,956	32,324
This week year ago	1,411	173	1,244	832	90	3,750	13,419	5,520	22,689
Cumulative exports-marketing year[2]									
2020/21 YTD	7,779	1,601	6,746	5,762	595	22,483	43,503	56,329	122,315
2019/20 YTD	8,463	2,225	6,496	4,391	851	22,427	24,034	34,034	80,495
YTD 2020/21 as % of 2019/20	92	72	104	131	70	100	181	166	152
Last 4 wks. as % of same period 2019/20*	76	143	93	147	81	100	200	92	158
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 4/29/2021	Total commitments[2]			% change	Exports[3]
	2021/22 next MY	2020/21 current MY	2019/20 last MY	current MY from last MY	3-yr. avg. 2017-19
			- 1,000 mt -		
Mexico	1,567	13,720	12,943	6	14,869
Japan	453	9,737	8,134	20	11,221
Columbia	0	3,624	3,637	(0)	4,830
Korea	0	3,153	1,900	66	4,011
China	0	23,244	882	2,536	909
Top 5 importers	**2,020**	**53,478**	**27,496**	**94**	**35,840**
Total U.S. corn export sales	**2,791**	**67,857**	**37,454**	**81**	**49,983**
% of projected exports	4%	96%	83%		
Change from prior week[2]	**106**	**137**	**774**		
Top 5 importers' share of U.S. corn export sales	72%	79%	73%		72%
USDA forecast May 2021	**62,341**	**70,611**	**45,242**	**56**	
Corn use for ethanol USDA forecast, May 2021	**132,080**	**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 4/29/2021	Total commitments[2]			% change	Exports[3]
	2021/22	2020/21	2019/20	current MY	3-yr. avg.
	next MY	current MY	last MY	from last MY	2017-19
			1,000 mt -		- 1,000 mt -
China	3,062	35,702	13,540	164	19,106
Mexico	167	4,625	4,217	10	4,591
Egypt	0	2,670	2,750	(3)	2,980
Indonesia	0	1,954	1,700	15	2,360
Japan	69	2,049	2,137	(4)	2,288
Top 5 importers	**3,298**	**47,000**	**24,345**	**93**	**31,324**
Total U.S. soybean export sales	**6,824**	**61,285**	**39,554**	**55**	**49,352**
% of projected exports	12%	99%	86%		
change from prior week[2]	**193**	**165**	**653**		
Top 5 importers' share of U.S. soybean export sales	48%	77%	62%		**63%**
USDA forecast, May 2021	**56,540**	**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 4/29/2021	Total Commitment			% change	Exports[3]
	2021/22	2020/21	2019/20	current MY	3-yr. avg.
	next MY	current MY	last MY	from last MY	2017-19
			1,000 mt -		- 1,000 mt -
Mexico	394.4	3,652	3,811	(4)	3,213
Philippines	603	3,209	3,454	(7)	2,888
Japan	180.3	2,492	2,745	(9)	2,655
Nigeria	168	1,426	1,568	(9)	1,433
Korea	142	1,846	1,615	14	1,372
Indonesia	0	937	1,066	(12)	1,195
Taiwan	51	1,186	1,442	(18)	1,175
Thailand	0	810	876	(8)	727
Italy	0	600	885	(32)	622
Colombia	82.5	381	791	(52)	618
Top 10 importers	**1,621**	**16,538**	**18,254**	(9)	**15,897**
Total U.S. wheat export sale	**2,992**	**25,498**	**26,177**	(3)	**23,821**
% of projected exports	12%	97%	100%		
change from prior week[2]	**400**	**-96**	**245**		
Top 10 importers' share of U.S. wheat export sales	54%	65%	70%		67%
USDA forecast, May 2021	**24,523**	**26,294**	**26,294**	0	

[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 05/06/21	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	321	345	93	5,962	5,639	106	137	128	15,966
Corn	433	682	63	7,437	2,979	250	197	133	9,969
Soybeans	10	3	316	3,658	2,664	137	3	5	14,028
Total	**763**	**1,030**	**74**	**17,057**	**11,281**	**151**	**139**	**120**	**39,963**
Mississippi Gulf									
Wheat	62	68	92	806	1,377	59	75	61	3,422
Corn	1,105	1,226	90	18,604	10,585	176	165	156	28,781
Soybeans	116	32	364	9,484	8,748	108	36	34	38,013
Total	**1,283**	**1,325**	**97**	**28,894**	**20,710**	**140**	**121**	**112**	**70,215**
Texas Gulf									
Wheat	111	55	203	1,271	1,311	97	124	69	4,248
Corn	0	31	0	216	278	78	38	48	723
Soybeans	0	0	n/a	656	7	n/a	0	0	2,098
Total	**111**	**86**	**130**	**2,143**	**1,596**	**134**	**94**	**65**	**7,068**
Interior									
Wheat	55	54	102	947	874	108	112	123	2,263
Corn	140	234	60	3,265	2,885	113	114	108	8,683
Soybeans	101	109	92	2,486	2,424	103	99	82	7,274
Total	**295**	**397**	**74**	**6,698**	**6,182**	**108**	**108**	**100**	**18,220**
Great Lakes									
Wheat	25	39	65	85	130	66	51	53	891
Corn	0	0	n/a	25	0	n/a	n/a	105	111
Soybeans	11	0	n/a	11	8	132	132	397	1,111
Total	**37**	**39**	**94**	**121**	**138**	**88**	**74**	**68**	**2,113**
Atlantic									
Wheat	0	0	n/a	72	1	n/a	n/a	n/a	65
Corn	0	0	n/a	14	8	174	86	35	33
Soybeans	11	8	144	987	355	278	107	44	1,870
Total	**11**	**8**	**138**	**1,073**	**365**	**294**	**104**	**43**	**1,968**
U.S. total from ports*									
Wheat	574	561	102	9,143	9,332	98	118	102	26,854
Corn	1,677	2,172	77	29,560	16,734	177	163	140	48,301
Soybeans	249	152	164	17,282	14,205	122	44	43	64,394
Total	**2,500**	**2,885**	**87**	**55,985**	**40,272**	**139**	**123**	**109**	**139,548**

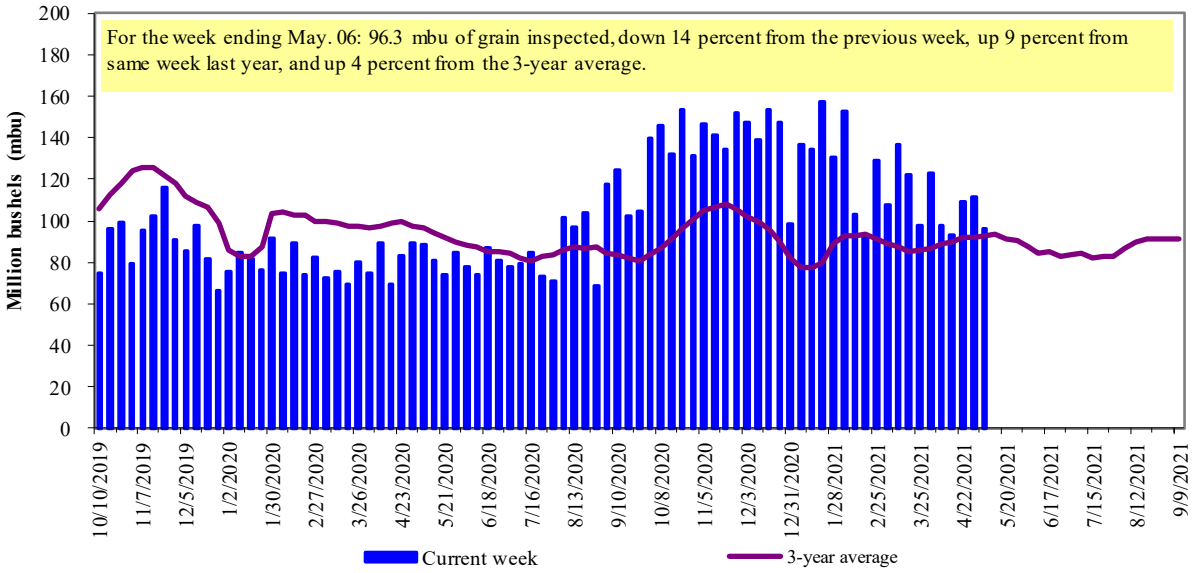
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

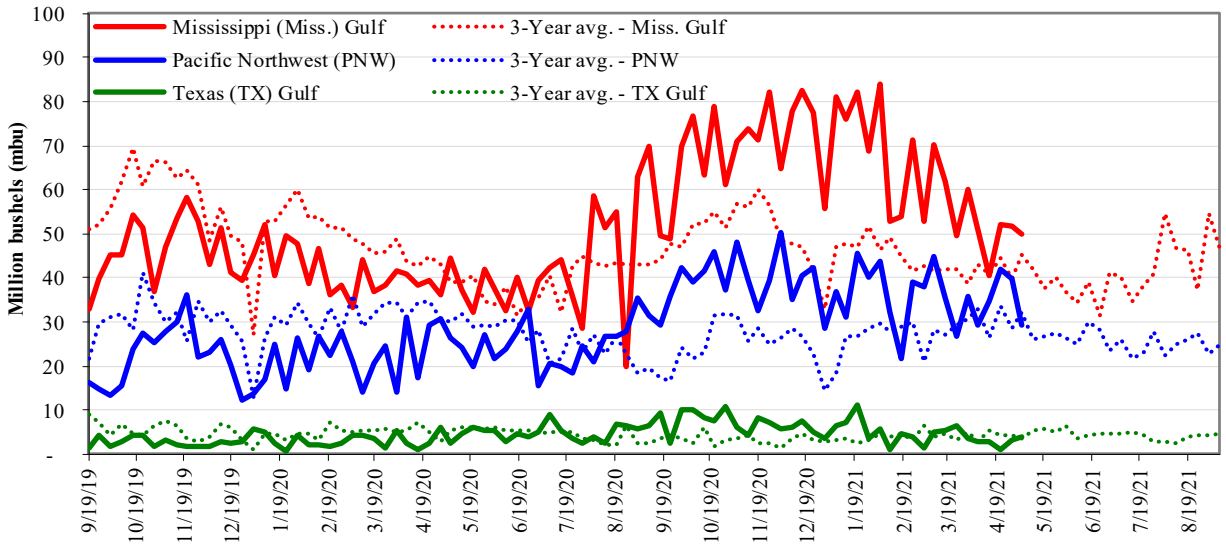


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 05/06/21 inspections (mbu):	
MS Gulf:	50.0
PNW:	29.2
TX Gulf:	4.1

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 4	up 26	down 2	down 26
Last Year (same wk):	up 12	up 77	up 15	up 10
3-yr avg. (4-wk. mov. Avg):	up 18	down 5	up 15	down 3

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

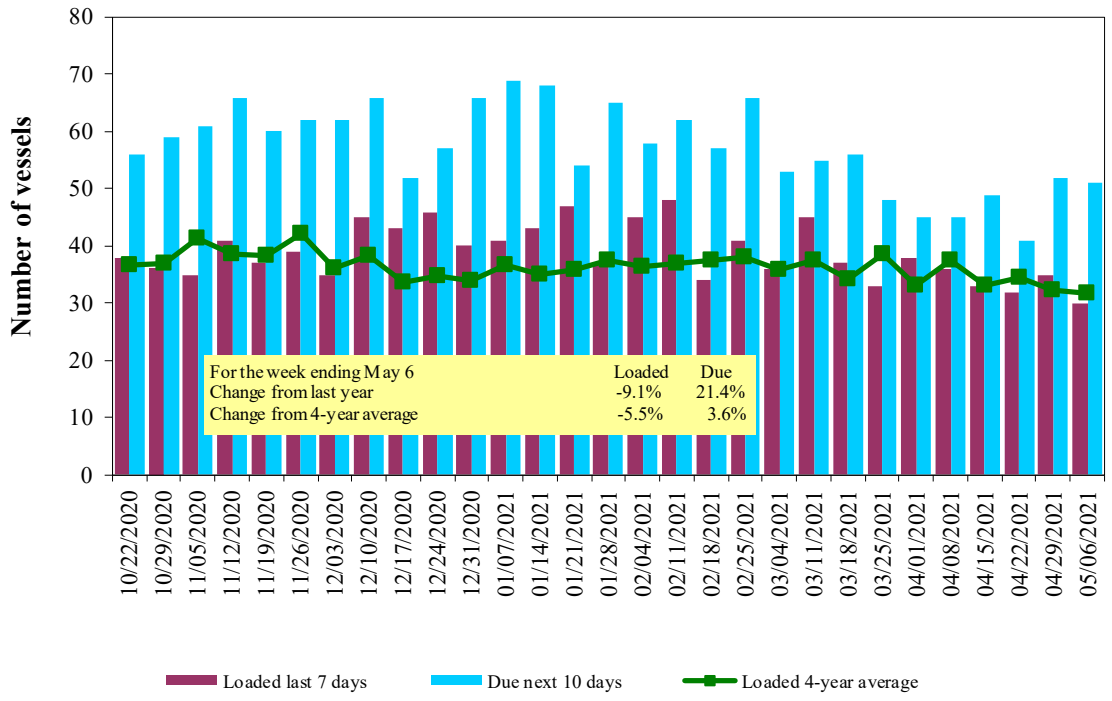
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
5/6/2021	24	30	51	18
4/29/2021	22	35	52	16
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

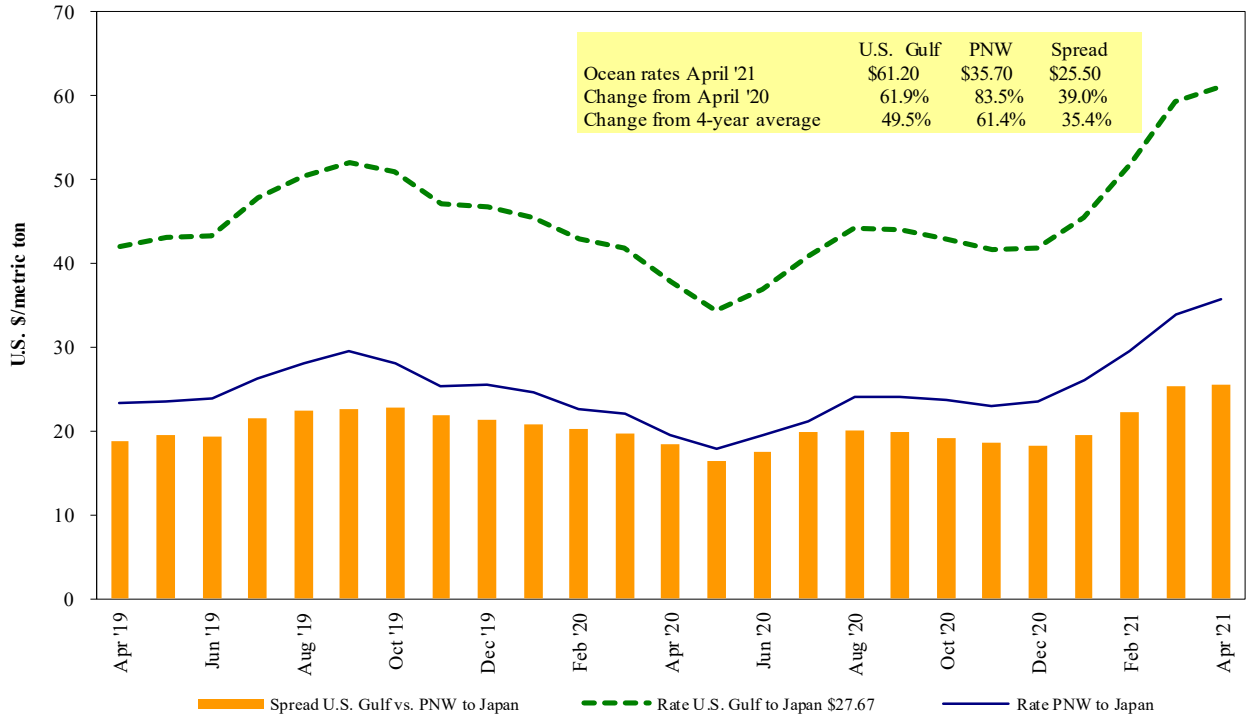
U.S. Gulf[1] vessel loading activity



[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 05/08/2021

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

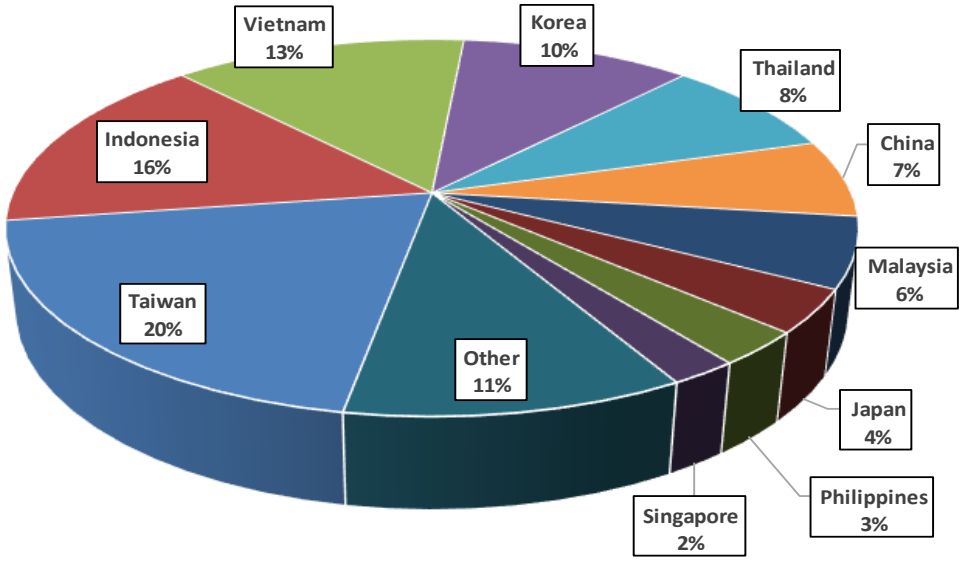
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

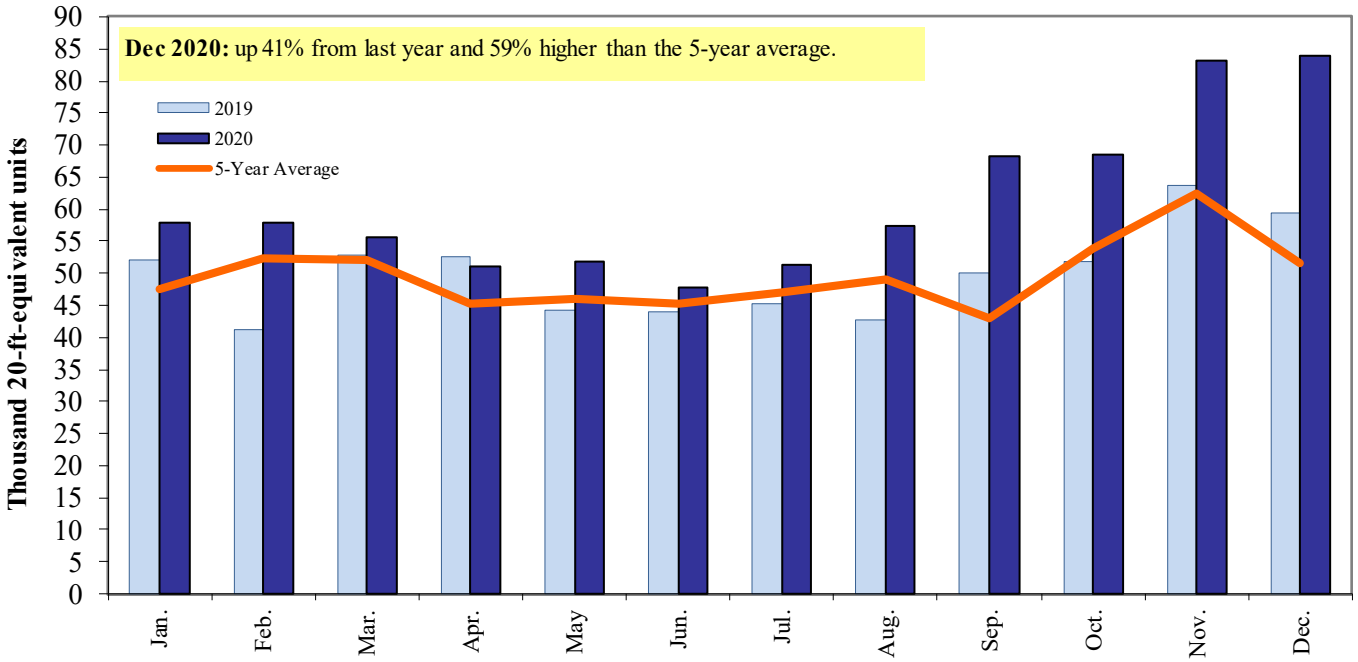
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2020



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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