USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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November 11, 2021

Contents

The next release is November 18, 2021

WEEKLY HIGHLIGHTS

STB Proposes a Procedural Schedule in the CP-KCS Merger

On October 29, Canadian Pacific Railway (CP) and Kansas City Southern Railway (KCS) filed a merger application at the Surface Transportation Board (STB). If STB approved the merger, the new railroad would be called Canadian Pacific Kansas City (CPKC) and would offer the only single-line service connecting Canada to Mexico. Based on 2017-21 originated carload numbers from STB, CP and KCS are the smallest of the Class I railroads. With their combined traffic, CPKC would still be the smallest Class I. However, because there are only seven Class I railroads currently, any merger is significant. So far in 2021, CP has originated 7.3 percent of grain carloads and KCS originated 2.7 percent. However, KCS represents 18 percent of received grain carloads so far in 2021, second only to Union Pacific, which reflects KCS's role as a critical gateway for receiving and delivering railed grain to Mexico. On November 2, STB proposed a procedural schedule for application review that extends through July of next year. Comments on the proposed schedule are due November 12. If the proposed schedule is unchanged, comments from the public would be due January 27, 2022 and replies would be due March 23, 2022.

DOT Partners With State of California To Address Supply Chain Infrastructure

On October 28, the State of California and the U.S. Department of Transportation (DOT) announced a partnership to expedite several existing and new projects to upgrade port and other supply-chain infrastructure. These projects represent long-term plans to alleviate congestion at Southern California's ports and improve the capacity and resiliency of the goods supply chain. To fund the upgrades, the partnership will help match project sponsors with "innovative financing opportunities," which partly include DOT credit assistance programs. Possible projects to be funded through this agreement include port-specific upgrades; expanded capacity for freight rail; development of inland port facilities for more warehouse storage; railyard and truck electrification; highway upgrades to improve truck travel times; and expanded land ports of entry.

Minnesota Waives Hours-of-Service Regulations To Transport Feed

On November 3, the Minnesota Governor signed executive order 21-33, which supports Minnesota livestock producers who have had difficulty accessing feed because of the State's historic drought. In effect for 30 days (starting November 3), the order waives hours-of-service (HOS) regulations to give livestock producers access to high-quality feed. Since July, the Governor has issued executive orders relaxing HOS restrictions for drivers and vehicles transporting livestock, hay, forage, water supplies, and supplemental feed commodities.

Snapshots by Sector

Export Sales

For the week ending October 28 **unshipped balances** of wheat, corn, and soybeans for marketing year 2021/22 totaled 50.9 million metric tons (mmt), down 21 percent from same time last year and down less than 1 percent from the previous week. Net **corn export sales** were 1.224 mmt, up 37 percent from the previous week. Net **soybean export sales** were 1.864 mmt, up 58 percent from the previous week. Net weekly **wheat export sales** were 0.400 mmt, up 49 percent from the previous week.

Rail

U.S. Class I railroads originated 24,711 **grain carloads** during the week ending October 30. This was a 4-percent decrease from the previous week, 9 percent less than last year, and 3 percent more than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were $375 above tariff for the week ending November 4. This was $94 more than last week and $10 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 6, **barged grain movements** totaled 611,996 tons. This was 26 percent lower than the previous week and 36 percent lower than the same period last year.

For the week ending November 6, 377 grain barges **moved down river**—144 barges fewer than the previous week. There were 878 grain barges unloaded in the New Orleans region, 11 percent more than last week.

Ocean

For the week ending November 4, 38 **oceangoing grain vessels** were loaded in the Gulf—9 percent more than the same period last year. Within the next 10 days (starting November 5), 66 vessels were expected to be loaded—8 percent more than the same period last year.

As of November 4, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $84.50. This was 6 percent lower than the previous week. The rate from the Pacific Northwest to Japan was $45.25 per mt, 8 percent lower than the previous week.

Fuel

For the week ending November 8, the U.S. average **diesel fuel price** increased by .3 cents from the previous week to $3.73 per gallon, $1.35 above the same week last year. This is the 8th consecutive week that the national average diesel price has increased.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* November 11, 2021.
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Feature Article/Calendar

Transportation and Landed Costs of Grain to Mexico in Third Quarter 2021

Mexico continues to be one of the leading importers of U.S. grain (***GTR* tables 13-15**). Low transportation and landed costs for U.S.-Mexico routes are vital to the competitiveness of U.S. grain in Mexico and globally. U.S. grain is transported to Mexico either by cross-border land movements or by sea 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 (table 1).

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 3rd qtr.	2021 2nd qtr.	2021 3rd qtr.	Percent change Yr. to yr.	Percent change Qtr. to qtr.	2020 3rd qtr.	2021 2nd qtr.	2021 3rd qtr.	Percent change Yr. to yr.	Percent change Qtr. to qtr.
					Corn					
Origin			**IL**					**IA**		
Truck	12.38	13.99	13.19	6.5	-5.7	3.93	4.98	4.93	25.4	-1.0
Rail [1]	-	-	-	-	-	94.63	96.73	97.06	2.6	0.3
Barge[2]	21.58	17.29	22.10	2.4	27.8	-	-	-	-	-
Ocean[3]	14.39	23.75	27.68	92.4	16.5	-	-	-	-	-
Total transportation cost	48.35	55.03	62.97	30.2	14.4	98.56	101.71	101.99	3.5	0.3
Farm value[4]	128.34	229.91	232.93	81.5	1.3	126.11	230.57	238.83	89.4	3.6
Landed cost[5]	176.69	284.94	295.90	67.5	3.8	224.67	332.28	340.82	51.7	2.6
Transport % of landed cost	27	19	21	-	-	44	31	30	-	-
					Soybeans					
Origin			**IL**					**NE**		
Truck	12.38	13.99	13.19	6.5	-5.7	3.93	4.98	4.93	25.4	-1.0
Rail	-	-	-	-	-	97.11	99.21	99.56	2.5	0.4
Barge	21.58	17.29	22.10	2.4	27.8	-	-	-	-	-
Ocean	14.39	23.75	27.68	92.4	16.5	-	-	-	-	-
Total transportation cost	48.35	55.03	62.97	30.2	14.4	101.04	104.19	104.49	3.41	0.3
Farm value	331.06	527.88	492.37	48.7	-6.7	312.81	519.31	485.02	55.1	-6.6
Landed cost	379.41	582.91	555.34	46.4	-4.7	413.85	623.50	589.51	42.4	-5.5
Transport % of landed cost	13	9	11	-	-	24	17	18	-	-
					Wheat					
Origin			**KS**					**KS**		
Truck	3.93	4.98	4.93	25.4	-1.0	3.93	4.98	4.93	25.4	-1.0
Rail	42.07	42.07	42.07	0.0	0.0	81.17	83.37	83.99	3.5	0.7
Ocean	14.39	23.75	27.68	92.4	16.5	-	-	-	-	-
Total transportation cost	60.39	70.80	74.68	23.7	5.5	85.10	88.35	88.92	4.5	0.6
Farm value	158.37	227.44	239.45	51.2	5.3	158.37	227.44	239.45	51.2	5.3
Landed cost	218.76	298.24	314.13	43.6	5.3	243.47	315.79	328.37	34.9	4.0
Transport % of landed cost	28	24	24	-	-	35	28	27	-	-

[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: "-" indicates data not required or applicable. 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 through the water routes increased from second quarter 2021 to third quarter 2021 (quarter to quarter). Rising water-route shipping costs reflected higher barge and ocean freight rates.[1] Land-route shipping costs remained relatively stable, as falling truck rates

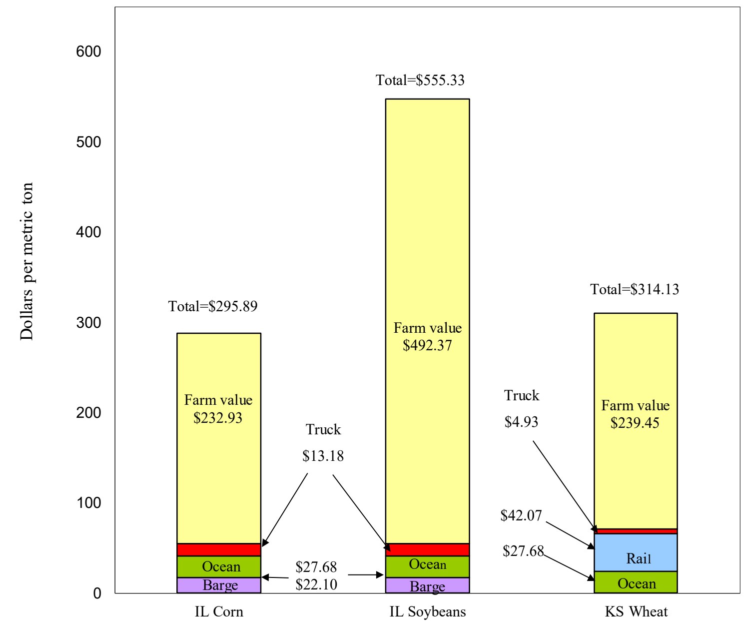
[1] Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

mostly offset a slight rise in rail rates (public tariff, plus fuel surcharge). Barge rates rose amid high demand for empty barges, more scrapping activity, and new logistical challenges related to Hurricane Ida (*GTR*, October 28, 2021).

Responding to strong demand for shipping bulk items, ocean freight rates rose to their highest levels since second quarter 2008, while congestion and other logistic inefficiencies constricted vessel supply (*GTR*, October 14, 2021). Despite already high diesel fuel prices, which continued rising in the third quarter, truck rates fell. Quarter to quarter, the trucking use index in the Midwest was down, reflecting falling demand for trucking services (*Grain Truck and Ocean Rate Advisory*). Rail tariff rates remained relatively unchanged.

Year-to-year transportation costs. From third quarter 2020 to third quarter 2021 (year to year), total costs of shipping all grain (U.S. corn, soybeans, and wheat) to Mexico by the water routes rose because of higher truck, barge, and ocean rates. Likewise, total costs of shipping all grain to Mexico by the land routes rose because of higher truck and rail tariff rates.

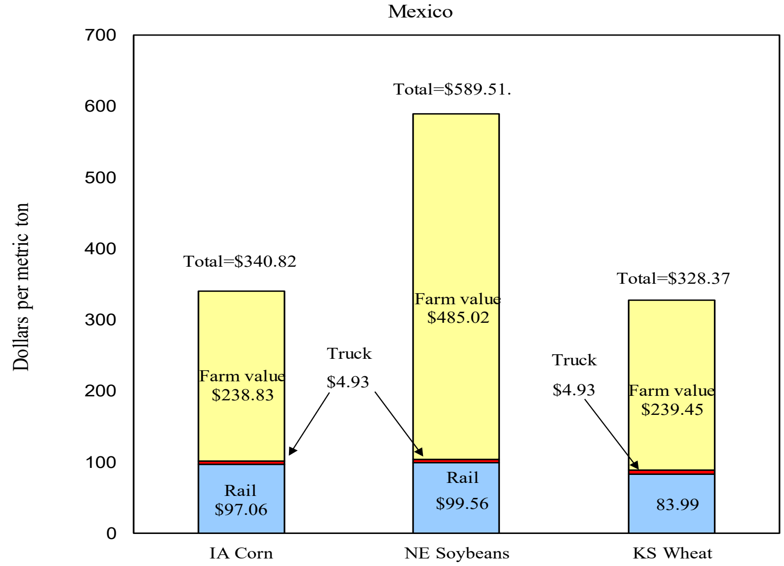
Figure 1. Third-quarter 2021 water-route landed costs to Veracruz, Mexico



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

Quarter-to-quarter landed costs. Quarter to quarter, landed costs rose for corn and wheat shipped via the water and land routes. Increased landed costs reflected both higher farm values and higher transport costs—though the rise in transport costs was less sharp for the land routes (table 1 and figs. 1 and 2). Falling farm values pushed down soybean landed costs. The share of landed costs comprising transportation ranged from 11 percent to 24 percent for the water routes and from 18 percent to 30 percent for the land routes.

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



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

Year-to-year landed costs. Year to year, landed costs increased for both waterborne and land-route grains, because of both higher transportation costs and higher farm values.

U.S. Exports to Mexico. According to USDA's Federal Grain Inspection Service, Mexico imported 3.62 million metric tons (mmt) of U.S. corn, 0.91 mmt of U.S. soybeans, and 1.23 mmt of U.S. wheat in third quarter 2021. Quarter to quarter, U.S. inspections for export to Mexico decreased 18 percent for corn, decreased 1 percent for soybeans, and increased 22 percent for wheat. Year to year, U.S. inspections destined to Mexico rose 12 percent for corn, fell 12 percent for soybeans, and rose 70 percent for wheat. Despite the increases in farm prices and transportation costs, total U.S. grain shipments to Mexico have been strong, as corn and wheat shipments have increased year to year.

surajudeen.olowolayemo@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
11/10/21	250	297	245	282	378	321
11/03/21	250	297	241	263	400	348

[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.

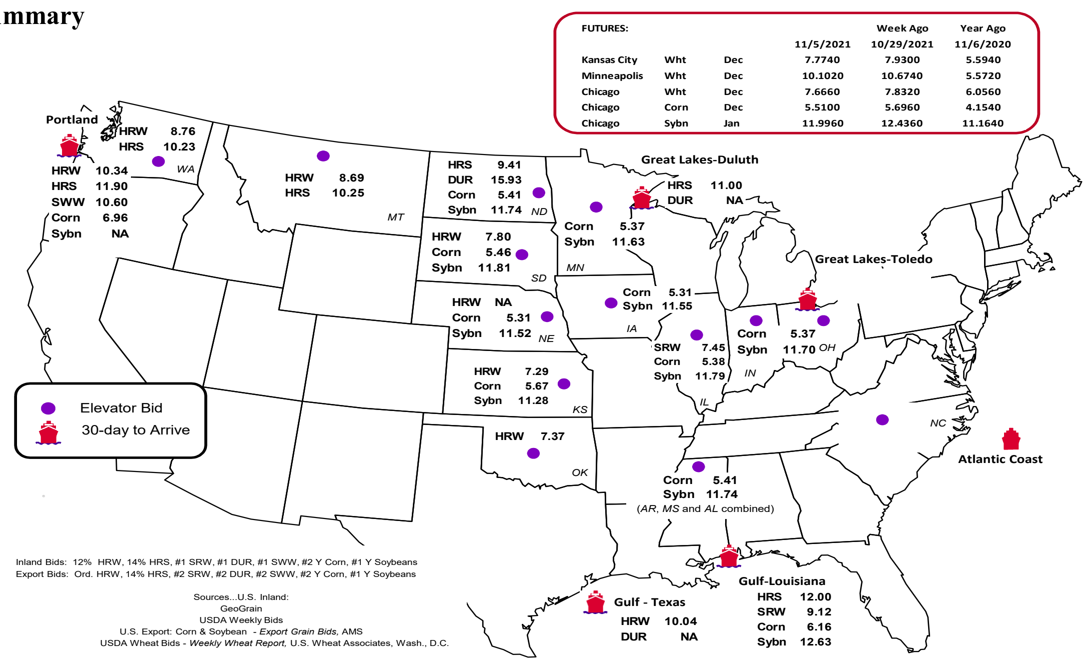
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	11/5/2021	10/29/2021
Corn	IL–Gulf	-0.78	-0.80
Corn	NE–Gulf	-0.85	-0.81
Soybean	IA–Gulf	-1.08	-1.16
HRW	KS–Gulf	-2.75	-2.75
HRS	ND–Portland	-2.49	-2.40

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
11/03/2021[p]	1,539	1,319	8,389	850	12,097
10/27/2021[r]	1,314	1,114	9,581	1,186	13,195
2021 YTD[r]	42,781	56,581	247,926	15,508	362,796
2020 YTD[r]	29,025	46,289	227,247	15,003	317,564
2021 YTD as % of 2020 YTD	147	122	109	103	114
Last 4 weeks as % of 2020[2]	72	70	108	80	95
Last 4 weeks as % of 4-year avg.[2]	113	145	142	126	138
Total 2020	45,294	64,116	299,882	24,458	433,750
Total 2019	40,974	51,167	251,181	16,192	359,514

Week ending	Cross-border Mexico[3]
10/30/2021	2,950
10/23/2021	2,973
2021 YTD	122,360
2020 YTD	106,691
% change YTD	115
Last 4wks. % 2020	130
Last 4wks. % 4 yr.	108
Total 2020	126,407
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.

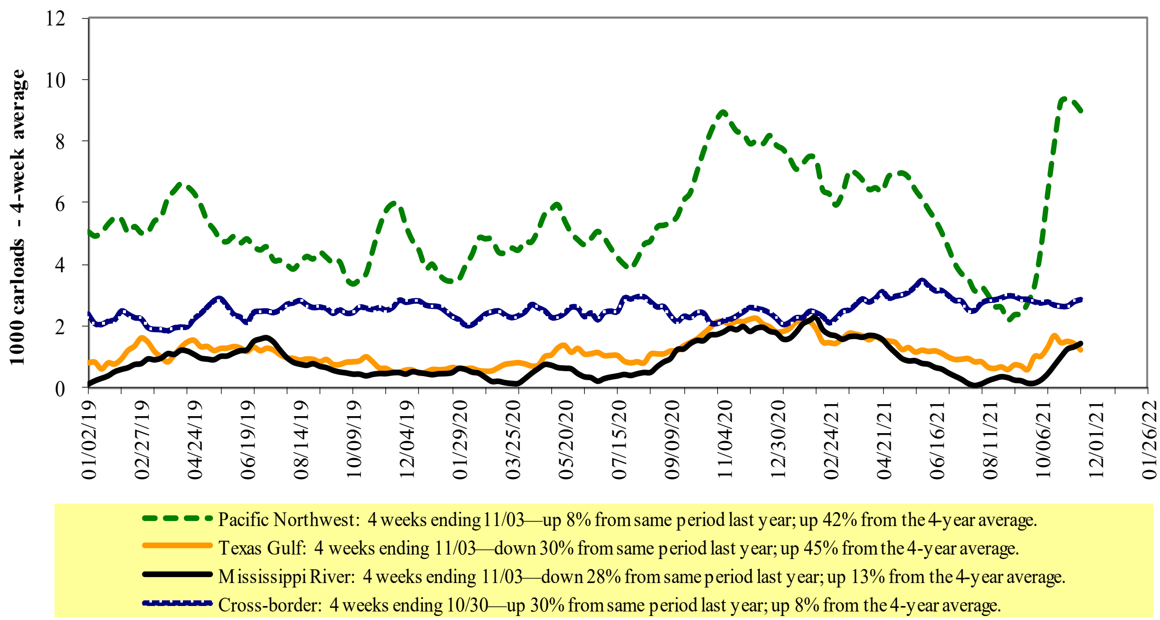
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 10/30/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,309	2,174	12,368	1,389	6,471	24,711	4,735	4,864
This week last year	1,903	2,816	14,125	1,421	6,786	27,051	5,824	6,054
2021 YTD	76,191	101,597	498,262	52,313	264,204	992,567	176,593	204,132
2020 YTD	73,343	104,593	492,291	47,844	235,920	953,991	188,607	208,282
2021 YTD as % of 2020 YTD	104	97	101	109	112	104	94	98
Last 4 weeks as % of 2020*	94	76	94	115	97	94	77	82
Last 4 weeks as % of 3-yr. avg.**	95	86	104	133	120	106	91	90
Total 2020	91,659	129,813	613,630	57,782	296,701	1,189,585	238,143	261,778

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

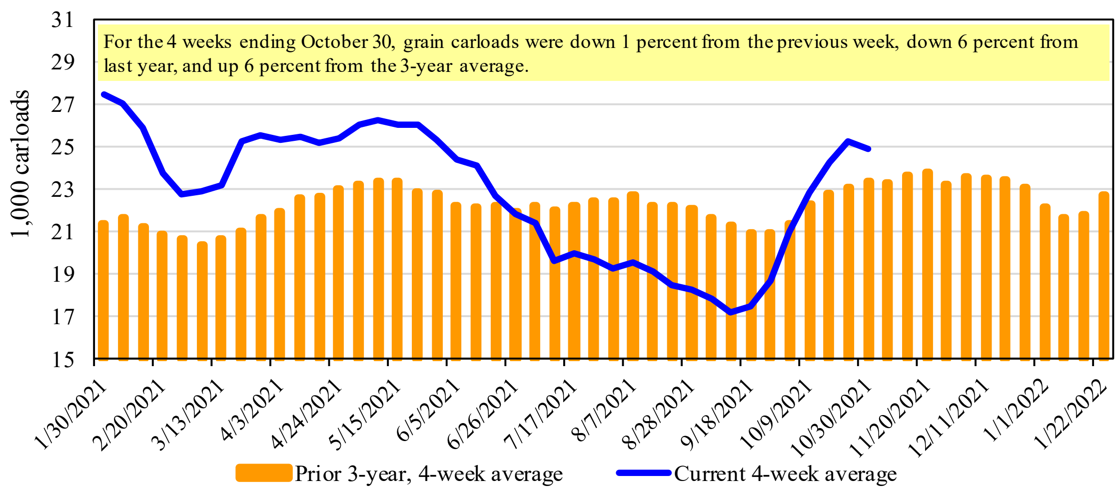
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 11/4/2021		Nov-21	Nov-20	Dec-21	Dec-20	Jan-22	Jan-21	Feb-22	Feb-21
		Delivery period							
BNSF[3]	COT grain units	0	no bids	0	no bids	0	9	0	0
	COT grain single-car	106	0	69	0	1	17	1	0
UP[4]	GCAS/Region 1	n/a	no offer	n/a	no offer	n/a	no offer	n/a	n/a
	GCAS/Region 2	n/a	no offer	n/a	no offer	n/a	no offer	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.

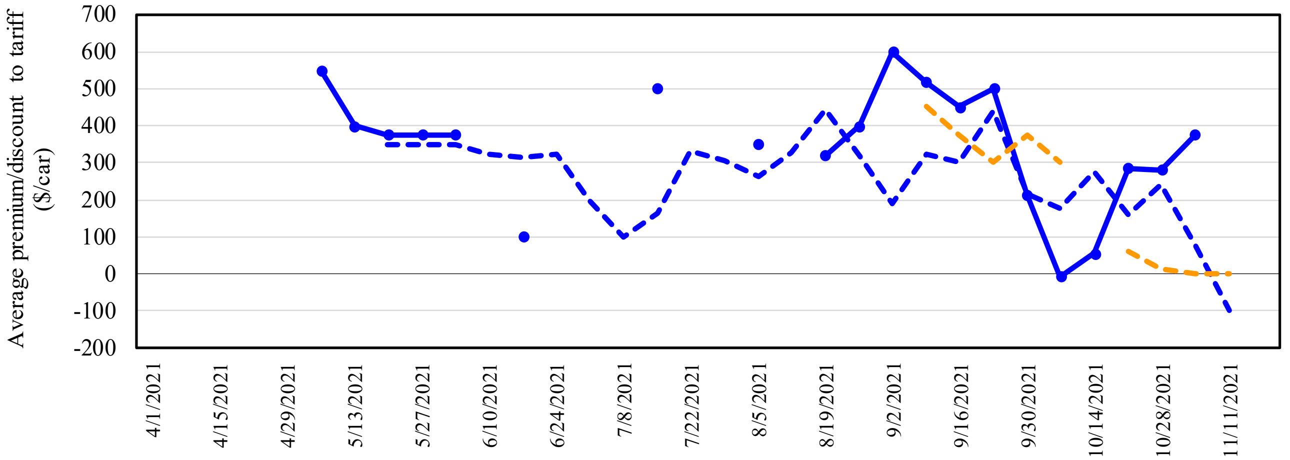
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 November 2021, secondary market

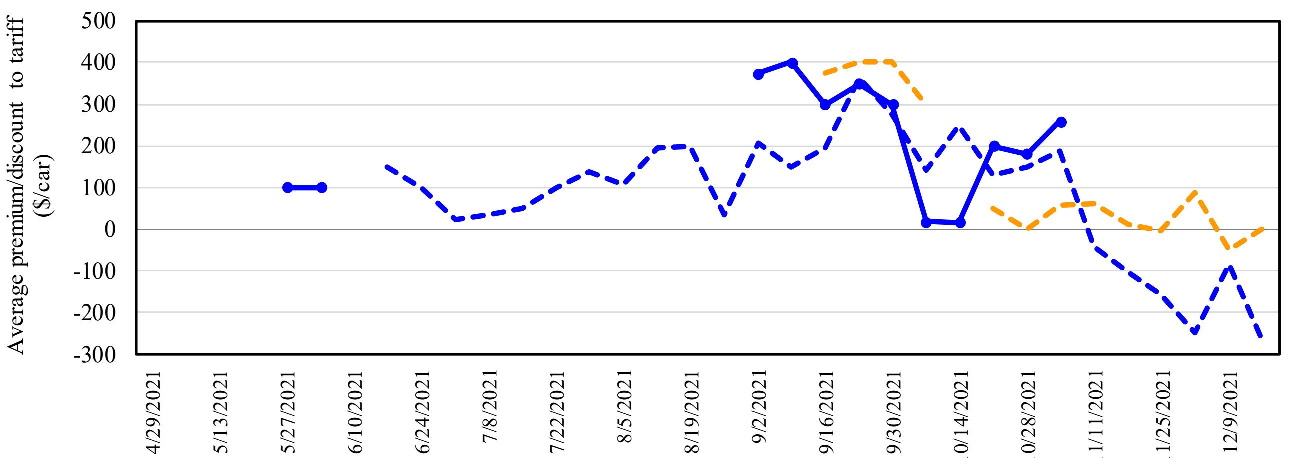


11/4/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$475	$275

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $94 this week and are $225 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 December 2021, secondary market



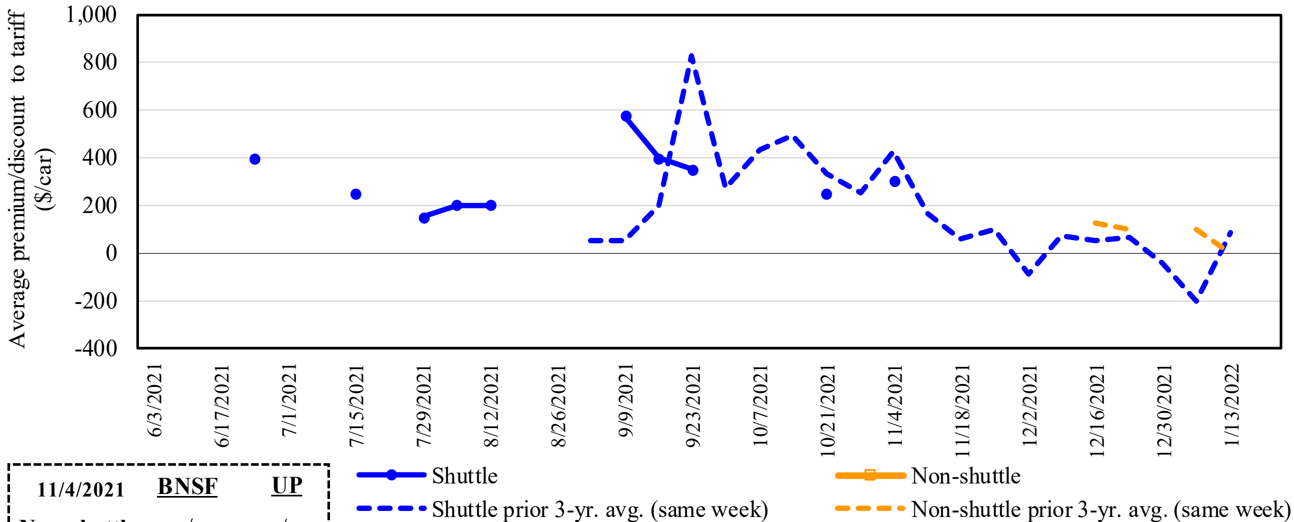
11/4/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$306	$213

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $78 this week and are $141 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 January 2022, secondary market



11/4/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$300	n/a

There were no non-shuttle bids/offers this week.
There were no shuttle bids/offers last week. Average non-shuttle bids/offers this week are $275 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: 11/4/2021	Delivery period					
		Nov-21	**Dec-21**	**Jan-22**	**Feb-22**	**Mar-22**	**Apr-22**
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**	**475**	**306**	**300**	**300**	**150**	**(200)**
	Change from last week	232	143	n/a	0	n/a	0
	Change from same week 2020	8	(294)	n/a	n/a	n/a	n/a
	UP-Pool	**275**	**213**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(44)	13	n/a	n/a	n/a	n/a
	Change from same week 2020	13	(188)	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]

November 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	$3,695	$132	$38.00	$1.03	3
	Grand Forks, ND	Duluth-Superior, MN	$3,658	$0	$36.33	$0.99	-13
	Wichita, KS	Los Angeles, CA	$7,290	$0	$72.39	$1.97	2
	Wichita, KS	New Orleans, LA	$4,525	$231	$47.23	$1.29	4
	Sioux Falls, SD	Galveston-Houston, TX	$7,026	$0	$69.77	$1.90	3
	Colby, KS	Galveston-Houston, TX	$4,801	$254	$50.19	$1.37	4
	Amarillo, TX	Los Angeles, CA	$5,121	$353	$54.36	$1.48	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$262	$42.32	$1.07	7
	Toledo, OH	Raleigh, NC	$8,130	$0	$80.73	$2.05	4
	Des Moines, IA	Davenport, IA	$2,505	$55	$25.43	$0.65	4
	Indianapolis, IN	Atlanta, GA	$6,227	$0	$61.84	$1.57	4
	Indianapolis, IN	Knoxville, TN	$5,247	$0	$52.11	$1.32	4
	Des Moines, IA	Little Rock, AR	$4,000	$163	$41.34	$1.05	6
	Des Moines, IA	Los Angeles, CA	$5,880	$474	$63.10	$1.60	8
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$342	$39.45	$1.07	9
	Toledo, OH	Huntsville, AL	$6,714	$0	$66.67	$1.81	2
	Indianapolis, IN	Raleigh, NC	$7,422	$0	$73.70	$2.01	4
	Indianapolis, IN	Huntsville, AL	$5,367	$0	$53.30	$1.45	2
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$262	$49.72	$1.35	6
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,193	$0	$41.64	$1.13	4
	Wichita, KS	Galveston-Houston, TX	$4,411	$0	$43.80	$1.19	4
	Chicago, IL	Albany, NY	$6,670	$0	$66.24	$1.80	5
	Grand Forks, ND	Portland, OR	$5,851	$0	$58.10	$1.58	3
	Grand Forks, ND	Galveston-Houston, TX	$5,721	$0	$56.81	$1.55	-5
	Colby, KS	Portland, OR	$6,012	$416	$63.83	$1.74	5
Corn	Minneapolis, MN	Portland, OR	$5,380	$0	$53.43	$1.36	4
	Sioux Falls, SD	Tacoma, WA	$5,340	$0	$53.03	$1.35	4
	Champaign-Urbana, IL	New Orleans, LA	$3,920	$262	$41.52	$1.05	7
	Lincoln, NE	Galveston-Houston, TX	$4,080	$0	$40.52	$1.03	5
	Des Moines, IA	Amarillo, TX	$4,420	$205	$45.92	$1.17	6
	Minneapolis, MN	Tacoma, WA	$5,380	$0	$53.43	$1.36	4
	Council Bluffs, IA	Stockton, CA	$5,300	$0	$52.63	$1.34	4
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,050	$0	$60.08	$1.64	3
	Minneapolis, MN	Portland, OR	$6,100	$0	$60.58	$1.65	3
	Fargo, ND	Tacoma, WA	$5,950	$0	$59.09	$1.61	3
	Council Bluffs, IA	New Orleans, LA	$4,975	$302	$52.40	$1.43	6
	Toledo, OH	Huntsville, AL	$4,954	$0	$49.20	$1.34	0
	Grand Island, NE	Portland, OR	$5,360	$426	$57.45	$1.56	8

[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: November 2021				**Fuel**	**Tariff rate plus**		**Percent**
	Origin		**Tariff rate**	**surcharge**	**fuel surcharge per:**		**change[4]**
Commodity	**state**	**Destination region**	**per car[1]**	**per car[2]**	**metric ton[3]**	**bushel[3]**	**Y/Y**
Wheat	MT	Chihuahua, CI	$7,699	$0	$78.67	$2.14	4
	OK	Cuautitlan, EM	$6,900	$181	$72.35	$1.97	5
	KS	Guadalajara, JA	$7,619	$711	$85.11	$2.31	6
	TX	Salinas Victoria, NL	$4,420	$111	$46.30	$1.26	4
Corn	IA	Guadalajara, JA	$9,102	$632	$99.46	$2.52	6
	SD	Celaya, GJ	$8,300	$0	$84.81	$2.15	2
	NE	Queretaro, QA	$8,322	$384	$88.95	$2.26	4
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,687	$374	$82.37	$2.09	4
	SD	Torreon, CU	$7,825	$0	$79.95	$2.03	2
Soybeans	MO	Bojay (Tula), HG	$8,647	$588	$94.35	$2.57	5
	NE	Guadalajara, JA	$9,207	$611	$100.31	$2.73	4
	IA	El Castillo, JA	$9,510	$0	$97.17	$2.64	1
	KS	Torreon, CU	$8,109	$431	$87.26	$2.37	4
Sorghum	NE	Celaya, GJ	$7,932	$562	$86.79	$2.20	6
	KS	Queretaro, QA	$8,108	$226	$85.15	$2.16	2
	NE	Salinas Victoria, NL	$6,713	$182	$70.44	$1.79	2
	NE	Torreon, CU	$7,225	$399	$77.90	$1.98	5

[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.

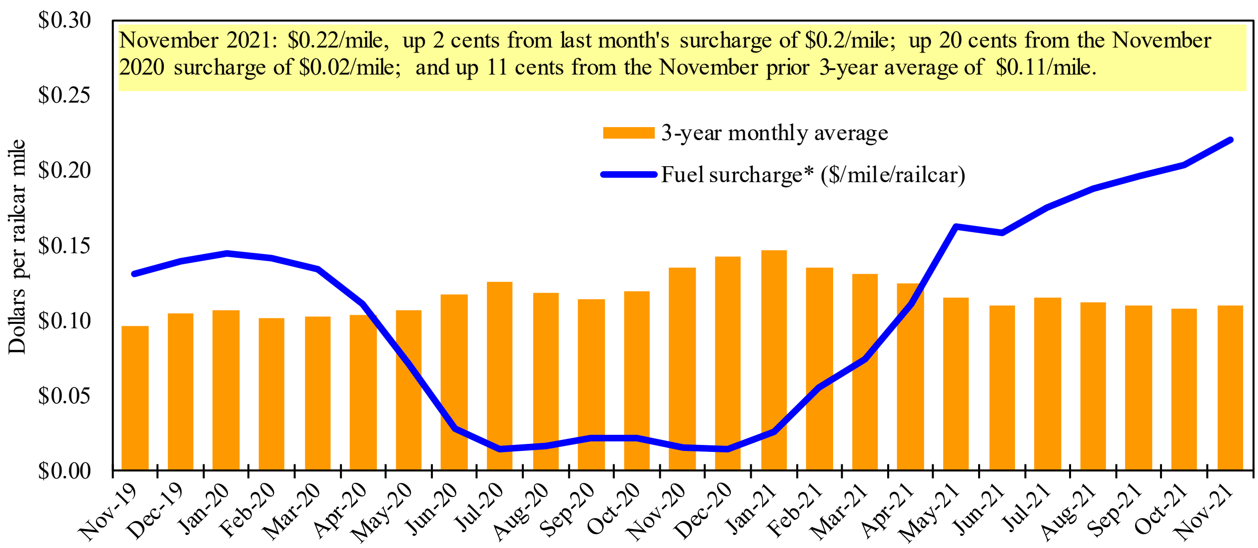
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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]

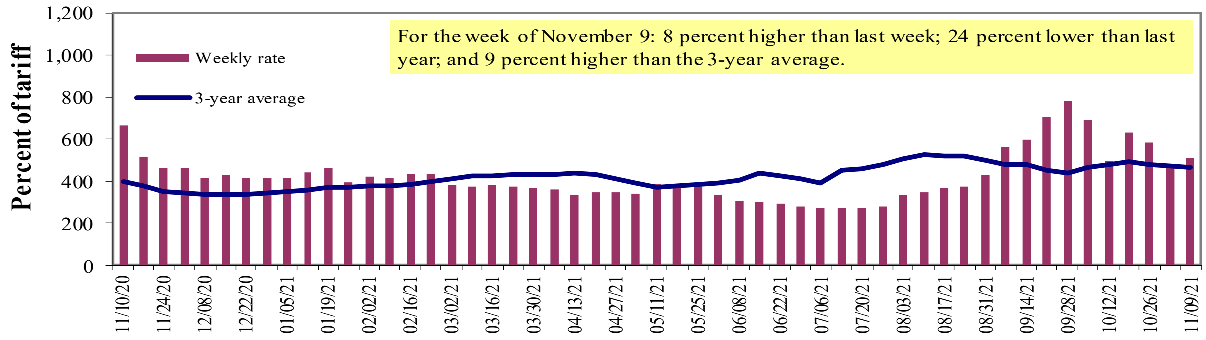


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: 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]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
*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]	11/9/2021	445	500	508	416	498	498	390
	11/2/2021	496	488	473	404	481	481	359
$/ton	11/9/2021	27.55	26.60	23.57	16.60	23.36	20.12	12.25
	11/2/2021	30.70	25.96	21.95	16.12	22.56	19.43	11.27
Current week % change from the same week:								
	Last year	-33	-28	-24	-38	-32	-32	-43
	3-year avg. [2]	-12	4	28	10	25	25	8
Rate[1]	December			414	325	352	352	294
	February	-	-	421	302	330	330	276

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to lock 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

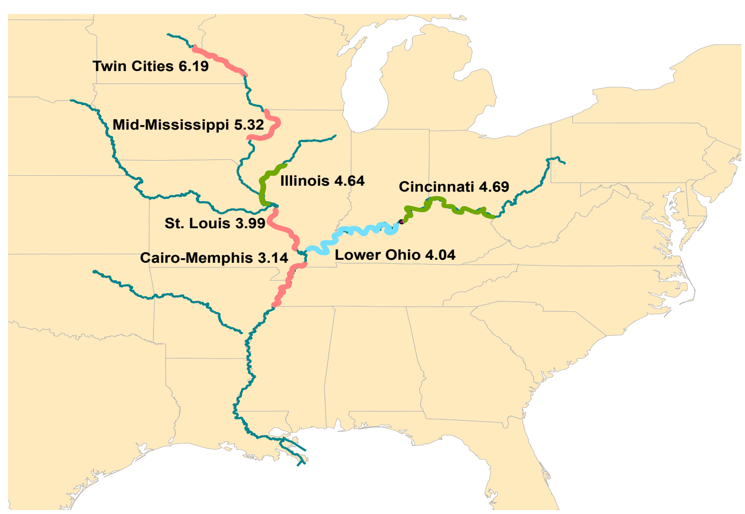
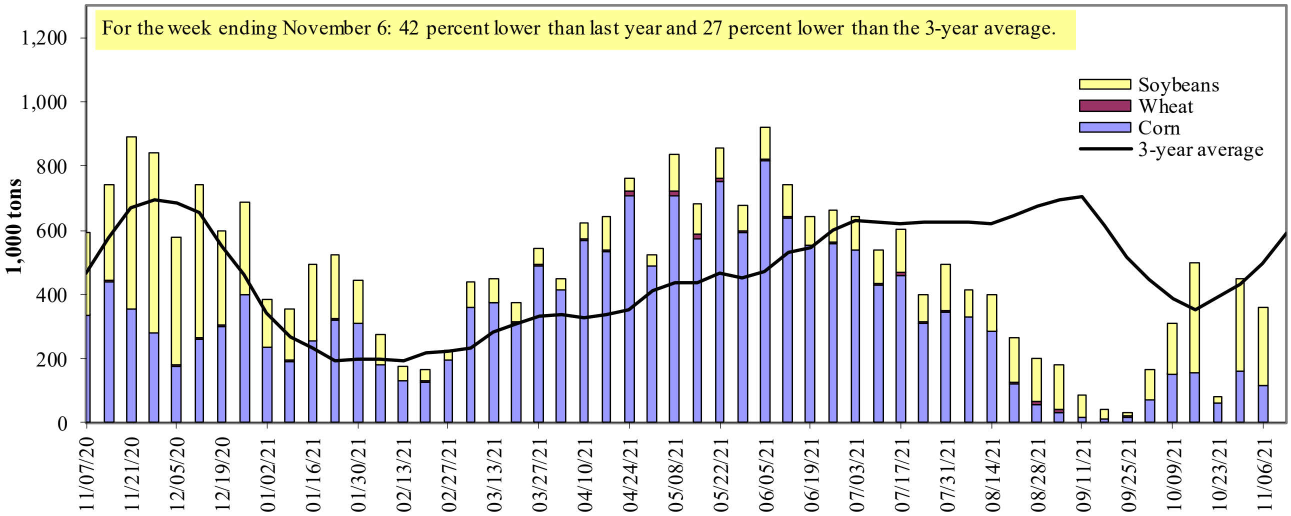


Figure 10

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 11/06/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	31	2	101	0	134
Winfield, MO (L25)	84	0	179	0	262
Alton, IL (L26)	104	0	213	0	317
Granite City, IL (L27)	117	0	243	0	360
Illinois River (La Grange)	27	0	5	0	32
Ohio River (Olmsted)	121	5	85	0	212
Arkansas River (L1)	0	4	36	0	40
Weekly total - 2021	238	10	365	0	612
Weekly total - 2020	332	12	616	1	960
2021 YTD[1]	20,728	1,502	8,132	245	30,607
2020 YTD[1]	15,214	1,633	14,053	172	31,072
2021 as % of 2020 YTD	136	92	58	142	99
Last 4 weeks as % of 2020[2]	88	53	59	26	68
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.

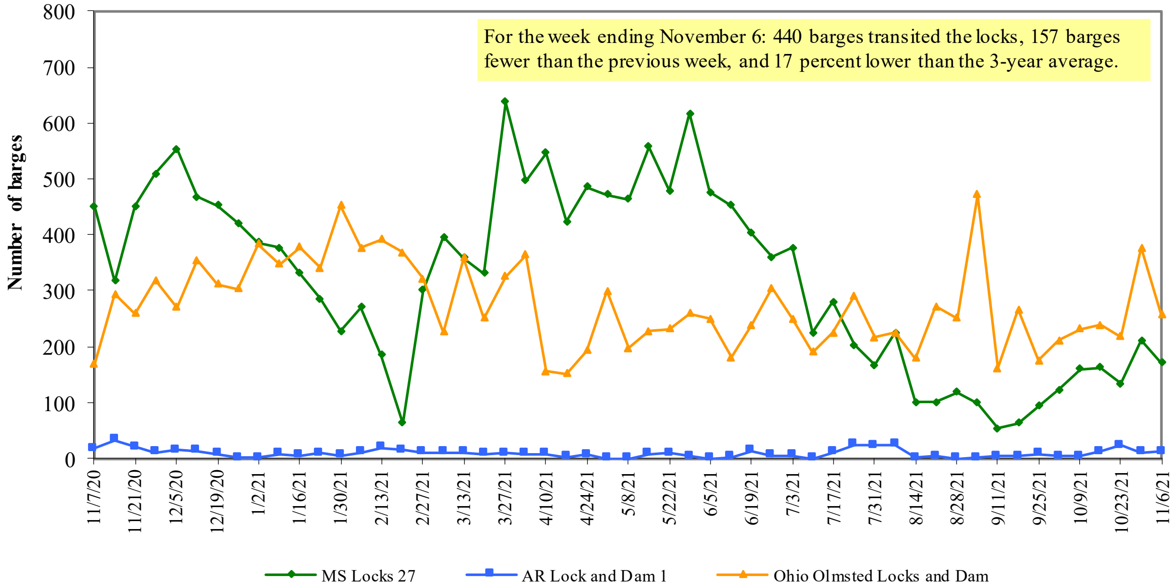
[2] As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

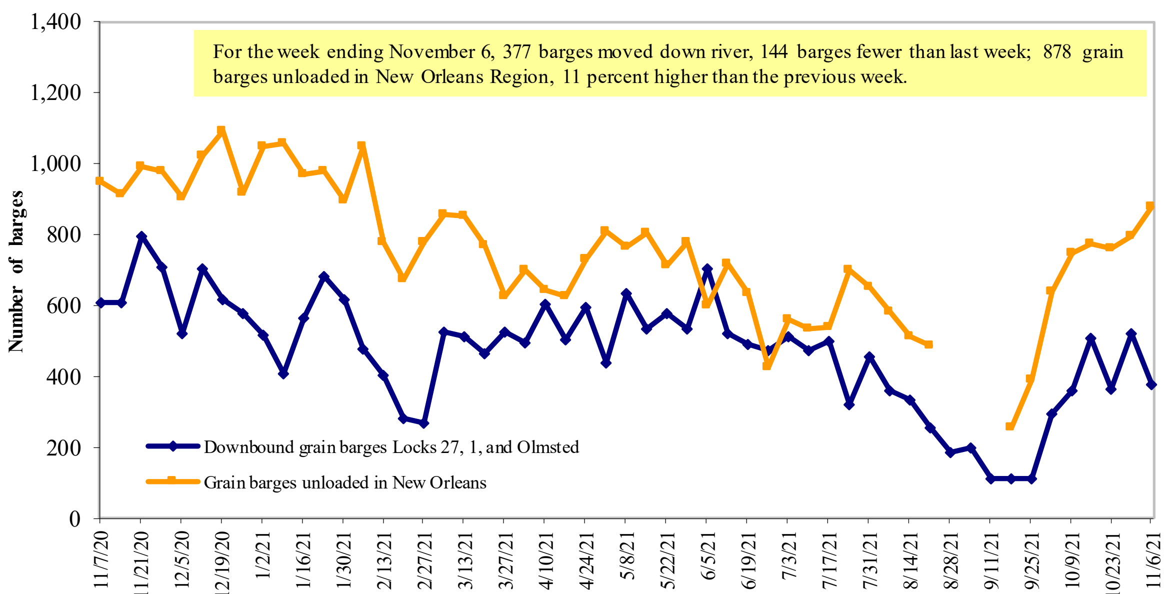
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/8/2021 (U.S. $/gallon)

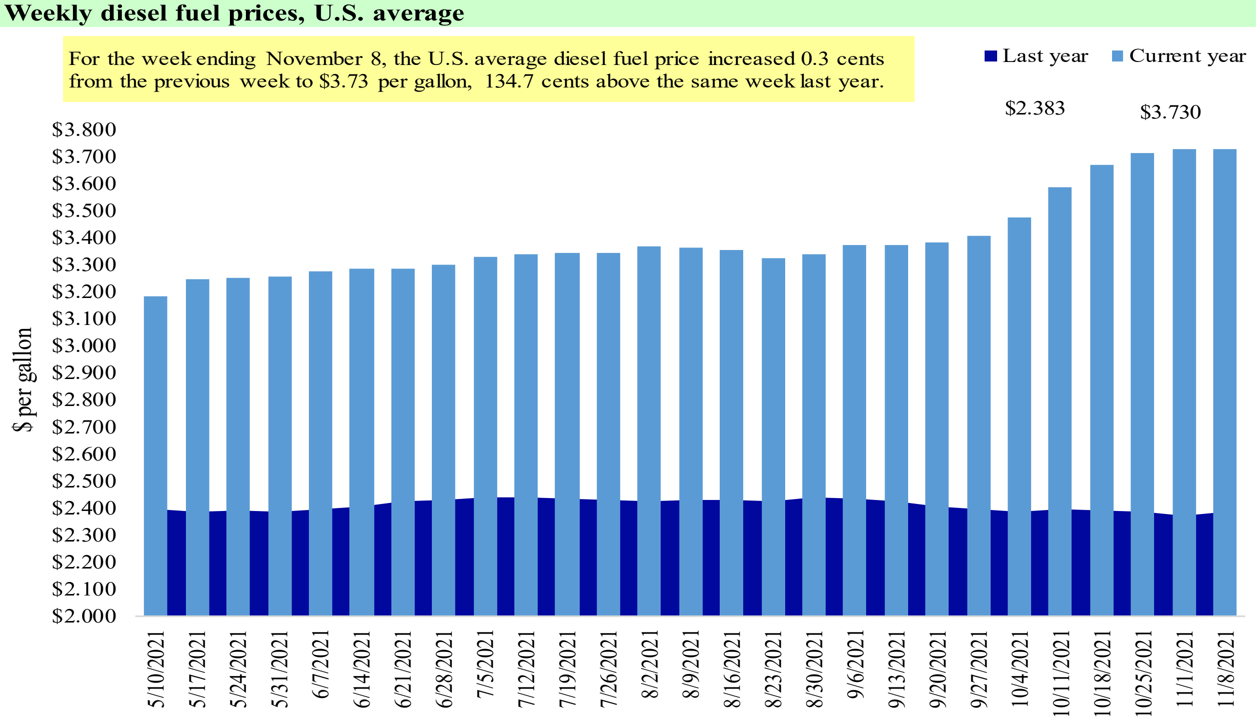
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.712	-0.005	1.262
	New England	3.656	0.005	1.102
	Central Atlantic	3.858	-0.004	1.213
	Lower Atlantic	3.624	-0.007	1.328
II	Midwest	3.633	-0.006	1.372
III	Gulf Coast	3.482	-0.004	1.350
IV	Rocky Mountain	3.833	0.019	1.461
V	West Coast	4.371	0.047	1.434
	West Coast less California	3.974	0.042	1.402
	California	4.701	0.050	1.464
Total	United States	3.730	0.003	1.347

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

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

Figure 13

Weekly diesel fuel prices, U.S. average



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

Grain Exports

Table 12

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

For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
	Wheat								
Export balances [1]									
10/28/2021	1,887	600	1,025	729	72	4,314	25,115	21,423	50,851
This week year ago	1,633	419	1,617	1,936	201	5,806	26,335	31,853	63,994
Cumulative exports-marketing year [2]									
2021/22 YTD	3,273	1,308	2,428	1,608	77	8,694	5,894	10,893	25,480
2020/21 YTD	4,484	938	3,109	2,081	340	10,951	6,854	16,579	34,384
YTD 2021/22 as % of 2020/21	73	140	78	77	23	79	86	66	74
Last 4 wks. as % of same period 2020/21*	104	145	62	34	31	69	93	70	80
Total 2020/21	8,331	1,744	7,337	6,281	654	24,347	66,702	60,287	151,336
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094

[1] Current unshipped (outstanding) export sales to date.

[2] Shipped export sales to date; 2021/22 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 10/28/2021	Total commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
	1,000 mt -			
Mexico	8,612	6,819	26	14,817
Japan	2,491	4,501	(45)	11,082
China	11,925	10,763	11	7,920
Columbia	1,380	1,572	(12)	4,491
Korea	72	472	(85)	3,302
Top 5 importers	**24,481**	**24,127**	**1**	**41,613**
Total U.S. corn export sales	**31,009**	**33,189**	**(7)**	**53,145**
% of projected exports	49%	47%		
Change from prior week[2]	**1,224**	**2,611**		
Top 5 importers' share of U.S. corn export sales	79%	73%		78%
USDA forecast November 2021	**63,613**	**70,051**	**(9)**	
Corn use for ethanol USDA forecast, November 2021	**133,350**	**127,711**	**4**	

[1] Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; 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 10/28/2021	Total commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
				- 1,000 mt -
China	17,252	26,807	(36)	21,666
Mexico	2,218	2,701	(18)	4,754
Egypt	984	1,316	(25)	3,093
Indonesia	380	743	(49)	2,325
Japan	780	774	1	2,275
Top 5 importers	**21,615**	**32,340**	**(33)**	**34,113**
Total U.S. soybean export sales	**32,315**	**48,432**	**(33)**	**50,758**
% of projected exports	58%	78%		
change from prior week[2]	**1,864**	**1,531**		
Top 5 importers' share of U.S. soybean export sales	67%	67%		**67%**
USDA forecast, November 2021	**55,858**	**61,717**	**(9)**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; 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 10/28/2021	Total Commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
		1,000 mt -		- 1,000 mt -
Mexico	2,355	2,266	4	3,388
Philippines	1,887	2,347	(20)	3,121
Japan	1,303	1,515	(14)	2,567
Korea	818	1,139	(28)	1,501
Nigeria	1,410	791	78	1,490
China	848	1,598	(47)	1,268
Taiwan	549	766	(28)	1,187
Indonesia	59	610	(90)	1,131
Thailand	371	495	(25)	768
Italy	154	481	(68)	681
Top 10 importers	**9,754**	**12,007**	(19)	**17,102**
Total U.S. wheat export sales	**13,007**	**16,757**	(22)	**24,617**
% of projected exports	56%	62%		
change from prior week[2]	**400**	**597**		
Top 10 importers' share of U.S. wheat export sales	75%	72%		69%
USDA forecast, November 2021	**23,433**	**27,030**	(13)	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; 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 11/04/21	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	60	29	209	12,223	13,732	89	26	21	15,966
Corn	0	0	n/a	12,369	8,453	146	0	0	9,969
Soybeans	994	915	109	9,366	9,505	99	112	202	14,028
Total	**1,055**	**944**	**112**	**33,958**	**31,689**	**107**	**92**	**127**	**39,963**
Mississippi Gulf									
Wheat	108	68	159	2,918	3,239	90	309	138	3,422
Corn	366	425	86	34,775	24,589	141	98	110	28,781
Soybeans	1,241	1,242	100	17,827	26,740	67	90	114	38,013
Total	**1,715**	**1,735**	**99**	**55,519**	**54,568**	**102**	**95**	**114**	**70,215**
Texas Gulf									
Wheat	0	6	0	3,423	3,974	86	26	21	4,248
Corn	0	0	n/a	506	650	78	8	11	723
Soybeans	168	119	141	1,301	1,159	112	96	288	2,098
Total	**168**	**125**	**134**	**5,230**	**5,783**	**90**	**74**	**131**	**7,068**
Interior									
Wheat	52	35	149	2,584	1,843	140	85	98	2,263
Corn	187	221	85	8,366	7,321	114	125	120	8,683
Soybeans	178	240	74	5,261	5,939	89	104	116	7,274
Total	**417**	**496**	**84**	**16,211**	**15,103**	**107**	**110**	**116**	**18,220**
Great Lakes									
Wheat	24	0	n/a	395	709	56	202	98	891
Corn	0	0	n/a	94	61	153	0	0	111
Soybeans	12	93	13	300	685	44	76	115	1,111
Total	**36**	**93**	**38**	**789**	**1,456**	**54**	**85**	**100**	**2,113**
Atlantic									
Wheat	0	0	n/a	125	34	364	0	0	65
Corn	0	13	0	81	33	245	334	314	33
Soybeans	138	73	188	1,490	1,069	139	103	175	1,870
Total	**138**	**86**	**159**	**1,695**	**1,137**	**149**	**106**	**179**	**1,968**
U.S. total from ports*									
Wheat	244	138	177	21,667	23,531	92	56	44	26,854
Corn	553	659	84	56,190	41,107	137	97	98	48,301
Soybeans	2,731	2,683	102	35,545	45,098	79	99	145	64,394
Total	**3,528**	**3,480**	**101**	**113,402**	**109,736**	**103**	**94**	**119**	**139,548**

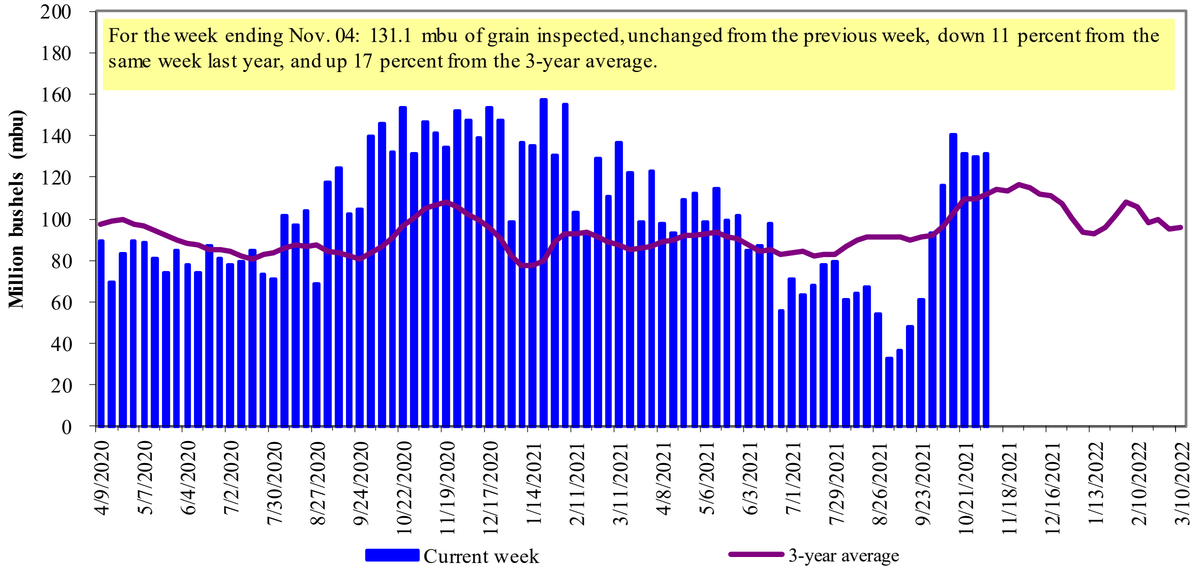
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 2020.

Figure 14

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

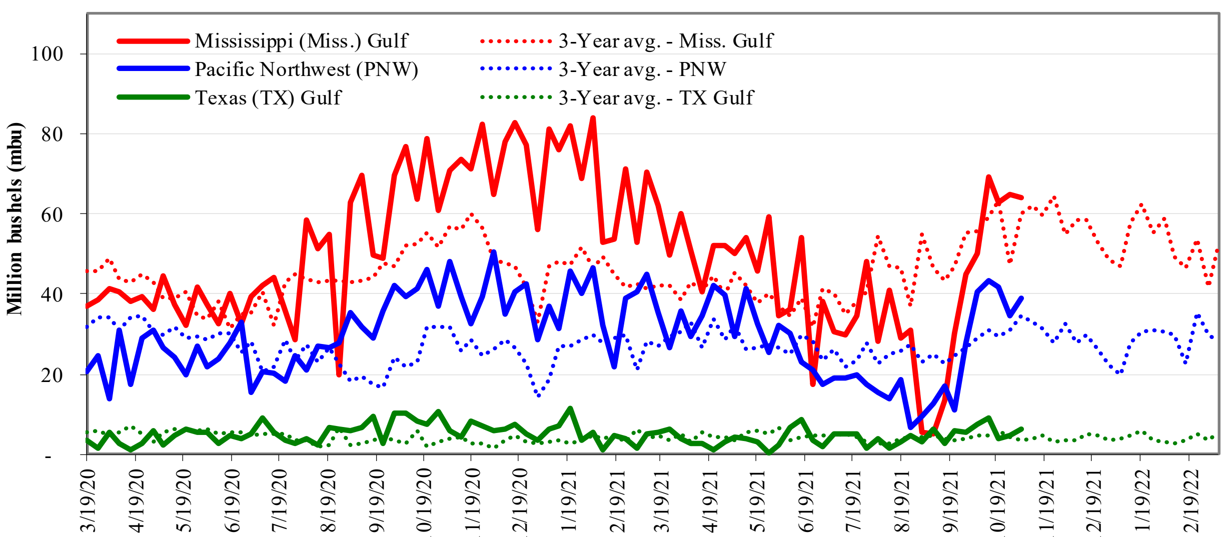


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 11/04/21 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	64.0	Last wk:	down 1	up 34	up 1	up 12
PNW:	38.8	Last Year (same wk):	down 10	up 4	down 9	down 19
TX Gulf:	6.2	3-yr avg. (4-wk. mov. Avg):	up 12	up 34	up 13	up 23

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

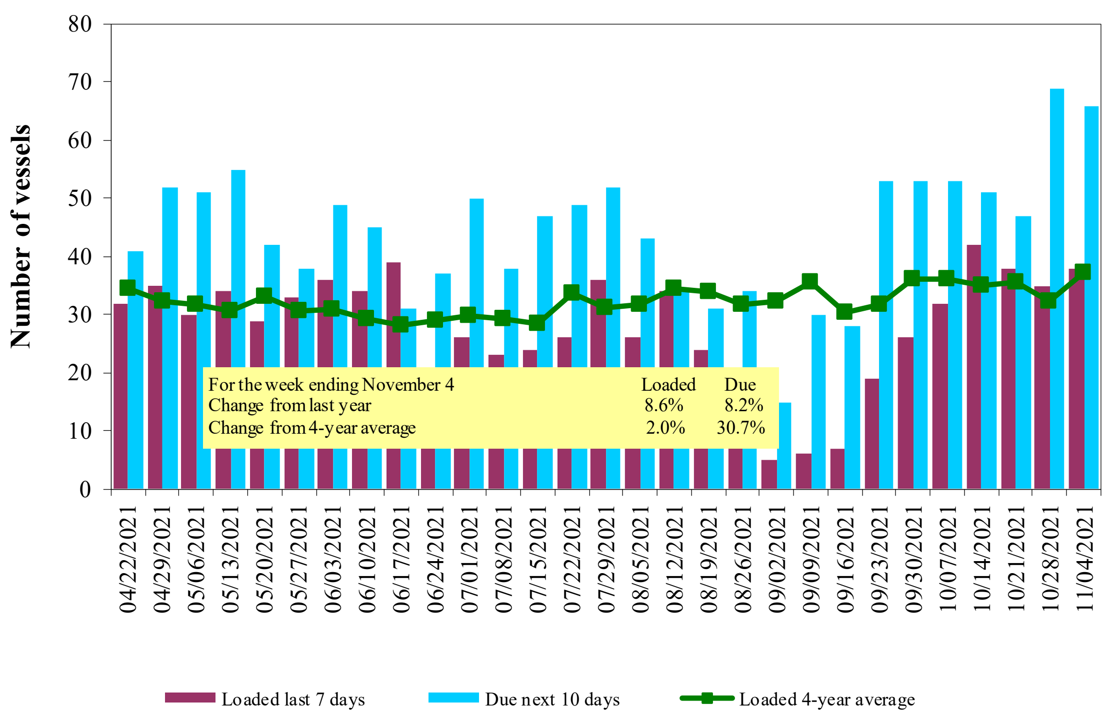
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/4/2021	44	38	66	14
10/28/2021	41	35	69	15
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

Note: n/a = not available due to holiday; *Incomplete data due to Hurricane Ida

Source: USDA, Agricultural Marketing Service.

Figure 16

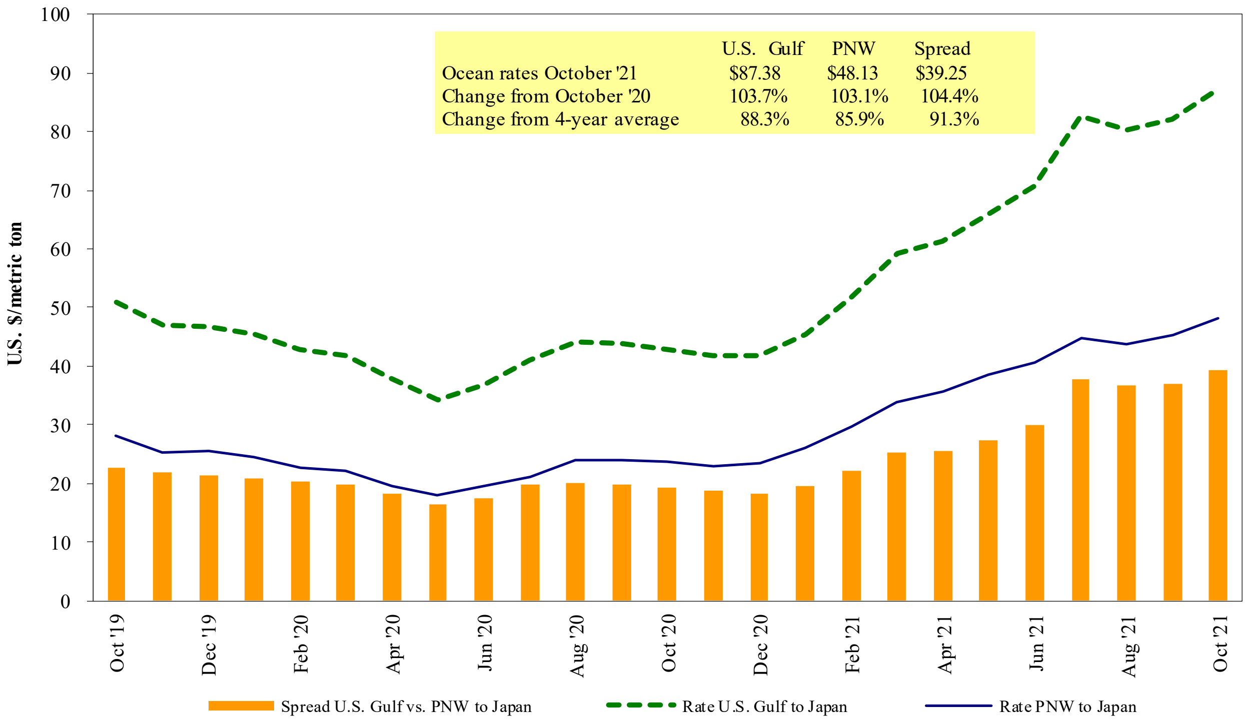
U.S. Gulf[1] vessel loading activity



[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 11/06/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Oct 1/10, 2021	48,000	70.10
U.S. Gulf	Japan	Heavy grain	Aug 21/Sep 9, 2021	50,000	60.90
U.S. Gulf	Japan	Heavy grain	Aug 1/10, 2021	50,000	69.75
U.S. Gulf	Sudan	Wheat	Sep 1/10, 2021	49,000	79.12*
U.S. Gulf	China	Heavy grain	Nov 1/10, 2021	66,000	89.00
U.S. Gulf	China	Heavy grain	Oct 1/10, 2021	55,000	81.50
U.S. Gulf	Djibouti	Wheat	Jul 6/16, 2021	5,880	85.70*
U.S. Gulf	S. Korea	Heavy grain	Dec 1/10, 2021	51,000	940.00
PNW	Japan	Wheat	Sep 1, 2021	52,170	56.55*
PNW	Japan	Wheat	Jul 25/ Aug 5, 2021	32,590	64.00
PNW	Taiwan	Wheat	Nov 1/10, 2021	49,580	67.30
PNW	Taiwan	Heavy grain	Aug 20/30, 2021	35,000	64.20*
PNW	Taiwan	Wheat	Aug 1/10, 2021	55,000	54.95
Brazil	N. China	Heavy grain	Jan 1/5, 2022	64,000	58.25
Australia	Japan	Barley	Nov 1/10, 2021	55,000	65.50
River Plate	South Korea	Corn	Oct 21, 2021	67,000	79.80

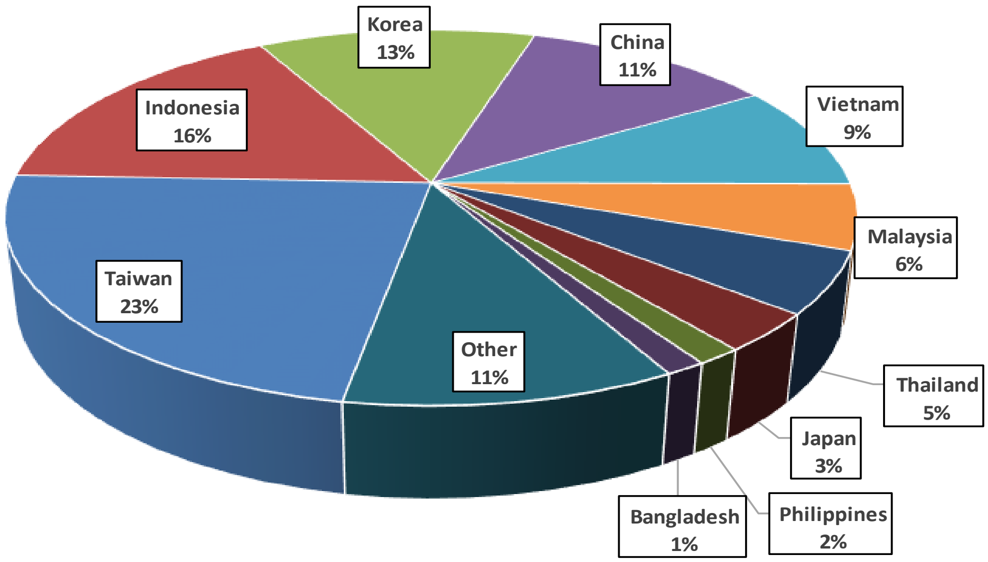
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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 2020, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 66 percent of U.S. waterborne grain exports in 2020 went to Asia, of which 14 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

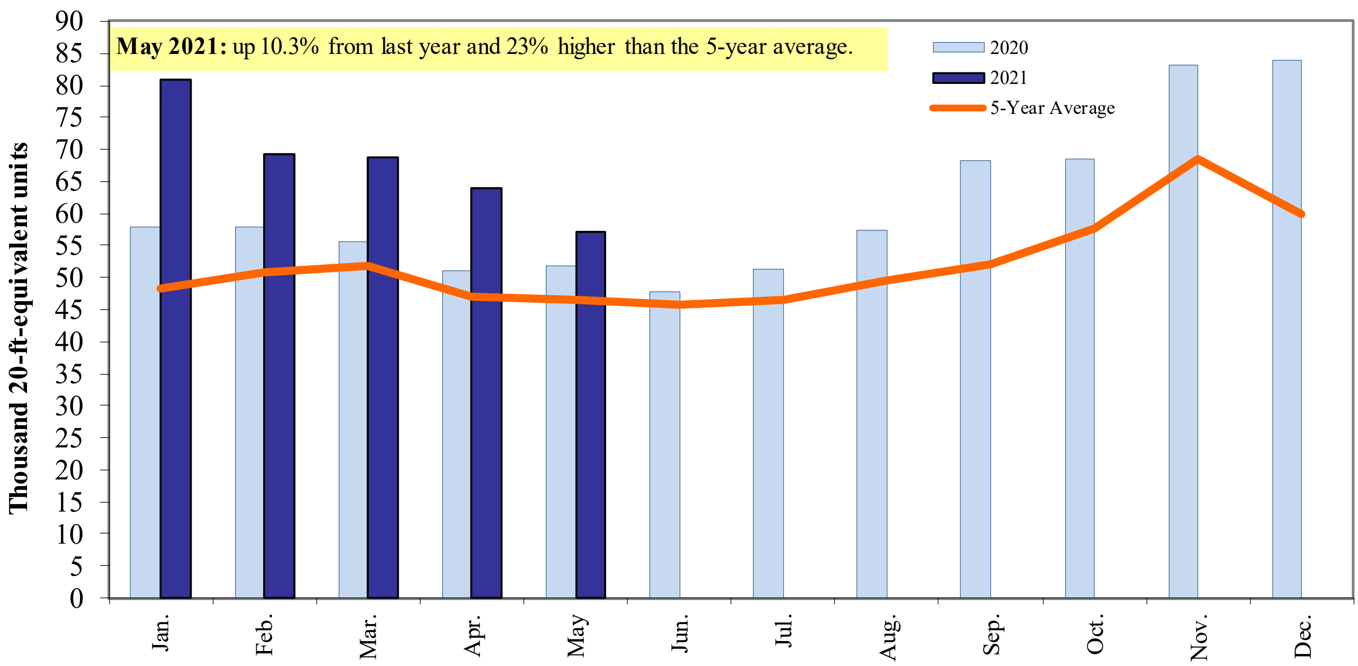
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2021



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 U.S. containerized grain exports



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.

Contacts and Links

Coordinators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Maria Williams	maria.williams@usda.gov	(202) 690 - 4430
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Rail Transportation		
Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690 - 3244
Barge Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Truck Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Grain Exports		
Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@usda.gov	(202) 720 - 7880
Editor		
Maria Williams	maria.williams@usda.gov	(202) 690-4430

Subscription Information: Please sign up to receive regular email announcements of the latest *GTR* issue by entering your email address **here** and selecting your preference to receive Transportation Research and Analysis. For any other information, you may contact us at **GTRContactUs@usda.gov**.

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