USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contents

The next release is December 9, 2021

WEEKLY HIGHLIGHTS

North Carolina Inland Port Facility May Help Ease Congestion at Port of Savannah

On November 18, the new Carolina Connector (CCX) intermodal transportation facility opened near Rocky Mount, NC. The 330-acre site allows trucks to bring cargo containers to a rail yard, where they are transferred to trains for transport. The facility is designed to move about 10,000 containers per month and provide regional industries with efficient access to rail. CCX is expected to help ease current congestion at the Port of Savannah—one of the Nation's busiest container ports. In 2019, the Port of Savannah was the top port in the Nation for containerized waterborne agricultural exports (when forestry products are included). Animal feed—mostly, distillers' dried grains with solubles (DDGS)—was also one of the Port's top agricultural exports. Contributing $40 million to the project, CSX Transportation built the facility and will operate it. The North Carolina Department of Transportation invested $118 million for site development and road construction.

FMCSA Grants Another HOS Waiver for Livestock Feed Haulers in North Dakota

On November 24, the Federal Motor Carrier Safety Administration (FMCSA) granted another extension to the hours of service (HOS) waiver for drivers of commercial vehicles transporting water and livestock feed in North Dakota. The waiver is intended to assist the State's livestock producers affected by continuing drought conditions. Originally issued on September 22, the extended waiver will remain in effect through December 24 or until the end of the emergency, whichever is earlier.

Upper Mississippi River 2021 Navigation Season Comes to an End

On November 23, the U.S. Army Corps of Engineers (USACE), St. Paul District, locked the last tow to depart St. Paul, MN, marking the end of the 2021 navigation season on the Upper Mississippi River. Historically, USACE recognizes the date of the last tow departing St. Paul (heading south of Lock and Dam 2 near Hastings, MN) as the unofficial end of the Upper Mississippi River's navigation season. Between 2015 and 2019, via the Mississippi River, barges moved about 13 percent of all U.S. bulk grain and 47 percent of grain destined to export markets. For the week ending on November 27, 2021, the Mississippi River locking system moved 33 million tons of U.S. bulk grain to the Gulf for export markets, 4 percent less than last year and 3 percent less than the 5-year average (***GTR* table 10**).

STB Sets Procedural Schedule for CP-KCS Merger

On November 23, the Surface Transportation Board (STB) accepted Canadian Pacific Railway (CP) and Kansas City Southern Railway's (KCS) merger application for consideration and set the procedural schedule. Notices of intent to participate in this proceeding are due by December 13, 2021. Comments from interested parties are due February 28, 2022, and reply comments, by April 22, 2022. If approved, the new railroad would be called Canadian Pacific Kansas City (CPKC) and would offer the only single-line service connecting Canada to Mexico.

Snapshots by Sector

Export Sales

For the week ending November 18, **unshipped balances** of wheat, corn, and soybeans for marketing year 2021/22 totaled 47.8 million metric tons (mmt), down 19 percent from same time last year and unchanged from the previous week. Net **corn export sales** were 1.429 mmt, up 58 percent from the previous week. Net **soybean export sales** were 1.565 mmt, up 13 percent from the previous week. Net weekly **wheat export sales** were 0.568 mmt, up 42 percent from the previous week.

Rail

U.S. Class I railroads originated 24,494 **grain carloads** during the week ending November 20. This was a 3-percent decrease from the previous week, 3 percent fewer than last year, and 3 percent more than the 3-year average.

Average December shuttle **secondary railcar** bids/offers (per car) were $508 above tariff for the week ending November 25. This was $3 less than last week and $453 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending November 27, **barged grain movements** totaled 684,300 tons. This was 16 percent fewer than the previous week and 48 percent fewer than the same period last year.

For the week ending November 27, 425 grain barges **moved down river**—72 fewer barges than the previous week. There were 908 grain barges unloaded in the New Orleans region, 2 percent more than last week.

Ocean

For the week ending November 25, 21 **oceangoing grain vessels** were loaded in the Gulf—down 46 percent from the same period last year. Within the next 10 days (starting November 26), 29 vessels were expected to be loaded—53 percent fewer than the same period last year.

Fuel

For the week ending November 29, the U.S. average **diesel fuel price decreased** by 0.4 cents from the previous week to $3.72 per gallon, $1.22 above the same week last year. At $3.60 per gallon, the average Midwest diesel price has declined for 4 consecutive weeks and is at its lowest level since October 11, 2021.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* December 2, 2021.
Web: **http://dx.doi.org/10.9752/TS056.12-02-2021**

Feature Article/Calendar

Third-Quarter 2021 Corn and Soybean Transport Costs Up From Last Quarter and Last Year

From second quarter 2021 to third quarter 2021 (quarter to quarter), transportation costs for shipping corn and soybeans from Minneapolis, MN, to Japan increased significantly through the U.S. Gulf (Gulf route) and increased slightly through the Pacific Northwest (PNW route). From third quarter 2020 to third quarter 2021 (year to year), transportation costs increased substantially for shipping corn and soybeans by the two major routes, primarily because of higher ocean freight rates.

Ocean rates increased for both routes, mainly because of strong demand for bulk products and tight vessel supply, reflecting increased demand from Asia (*GTR*, October 14, 2021). Year to year, for both commodities and both routes, Gulf and PNW transportation costs rose notably.

Table 1: Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	3rd qtr. '20	2nd qtr. '21	3rd qtr. '21	Yr. to Yr.	Qtr to Qtr	3rdqtr. '20	2nd qtr. '21	3rd qtr. '21	Yr. to Yr.	Qtr to Qtr
Truck	12.38	13.99	13.19	6.54	-5.72	12.38	13.99	13.19	6.54	-5.72
Barge[1]	29.89	29.60	32.61	9.10	10.17	29.89	29.60	32.61	9.10	10.17
Ocean	42.99	65.94	81.71	90.07	23.92	42.99	65.94	81.71	90.07	23.92
Total transportation cost	85.26	109.53	127.51	49.55	16.42	85.26	109.53	127.51	49.55	16.42
Farm value[3]	116.00	205.89	228.33	96.84	10.90	316.85	529.11	482.57	52.30	-8.80
Total landed cost	201.26	315.42	355.84	76.81	12.81	402.11	638.64	610.08	51.72	-4.47
Transportation % landed cost	42.36	34.73	35.83			21.20	17.15	20.90		

[1] Barge rates are from Minneapolis, MN to the Gulf.

[2] All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[3] USDA, National Agricultural Statistics Service is the source for corn and soybean prices.

Note: qtr. = quarter; yr. = year.

Source: USDA, Agricultural Marketing Service.

U.S. Gulf Costs

Quarter-to-quarter transportation costs. From quarter to quarter, Gulf-route transportation costs rose 16 percent each for corn and soybeans, mainly because of increasing barge and ocean freight rates (table 1). Barge rates for the Gulf route rose with improved demand for barge services. Ocean rates rose 24 percent. Trucking rates decreased 6 percent for moving corn and soybeans from Minnesota farms to local, truck-served grain elevators.

Year-to-year exports. Third-quarter 2021 corn exports through the Gulf route totaled 7 million metric tons (mmt) (up 7 percent year to year), accounting for 64 percent of total corn exports. Gulf-route soybean shipments totaled only 2.2 mmt (down 74 percent), accounting for 56 percent of total soybean exports (*GTR*, October 21, 2021).

Landed costs. Quarter to quarter, Gulf-route landed costs for corn rose moderately, with higher transportation costs, but landed costs for soybeans decreased because of lower farm values (table 1). As a share of landed costs, transportation costs for shipping corn were 36 percent, and transportation costs for shipping soybeans were 21 percent. Farm values accounted for 64 percent of landed costs for corn and 79 percent of the landed costs for soybeans. Farm values for corn increased 97 percent from year to year and rose 11 percent quarter to quarter. For the same periods, soybean farm values increased 52 percent year to year, but dropped 9 percent quarter to quarter.

Table 2: Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	3rd qtr. '20	2nd qtr. '21	3rd qtr. '21	Yr. to Yr.	Qtr to Qtr	3rd qtr. '20	2nd qtr. '21	3rd qtr. '21	Yr. to Yr.	Qtr to Qtr
Truck	12.38	13.99	13.19	6.54	-5.72	12.38	13.99	13.19	6.54	-5.72
Rail[2]	51.44	51.44	51.44	0.00	0.00	58.59	58.59	59.25	1.13	1.13
Ocean	23.05	38.34	44.56	93.32	16.22	23.05	38.34	44.56	93.32	16.22
Total Transportation Cost	86.87	103.77	109.19	25.69	5.22	94.02	110.92	117.00	24.44	5.48
Farm Value [3]	116.00	205.89	228.33	96.84	10.90	316.85	529.11	482.57	52.30	-8.80
Total Landed Cost	202.87	309.66	337.52	66.37	9.00	410.87	640.03	599.57	45.93	-6.32
Transportation % Landed Cost	42.82	33.51	32.35			22.88	17.33	19.51		

[1] Barge rates are from Minneapolis, MN to the Gulf.

[2] All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[3] USDA, National Agricultural Statistics Service is the source for corn and soybean prices.

Note: qtr. = quarter; yr. = year.

Source: USDA, Agricultural Marketing Service.

Pacific Northwest Costs

Quarter-to-quarter transportation costs. With notably higher ocean rates, total transportation costs via the PNW route rose 5 percent for corn and rose 6 percent for soybeans quarter to quarter (table 2). Rail rates were unchanged for corn, but up 1 percent for soybeans.

Year-to-year transportation costs and exports. PNW transportation costs rose 26 percent for corn and rose 24 percent for soybeans from year to year, mainly responding to a sizeable increase in ocean rates. Rail rates did not change for corn, but increased 1 percent for soybeans.

Third-quarter 2021 PNW corn exports totaled 1.6 mmt (14 percent of total third-quarter U.S. corn exports). This was down 45 percent, mainly because of lower demand from Asia (*GTR*, October 21, 2021). Soybean exports were .560 mmt, down 64 percent. Soybean exports were 14 percent of total third-quarter 2020 soybean exports.

Landed costs. Total PNW landed costs for corn increased 9 percent quarter to quarter and rose 66 percent year to year, because of higher transportation costs and higher farm values. Year to year, total landed costs for soybeans increased 46 percent, also because of higher transportation costs and higher farm values. For third-quarter 2021 corn shipments, transportation costs as a share of landed costs decreased to 32 percent, below both the previous quarter and last year.

Quarter to quarter, soybean landed costs in PNW fell 6 percent because of lower farm values. For soybeans, transportation costs accounted for 20 percent of landed costs—above the previous quarter, but below last year. In third quarter 2021, farm values accounted for 67 percent of total landed costs for corn and 81 percent of total landed costs for soybeans.

WASDE *Estimates*

According to USDA's November 2021 *World Agricultural Supply and Demand Estimates (WASDE)*, total U.S. corn exports for marketing year (MY) 2021/22 are expected to decrease 9 percent from MY 2020/21, as tight supplies continue to drive prices higher and foreign demand for U.S. corn has begun to decline. In MY 2021/22, soybean exports are also expected to decrease 9 percent from MY 2020/21, with expected lower shipments to Asia than in MY 2020/21. *Johnny.Hill@usda.gov*

Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
12/01/21	250	297	251	267	n/a	n/a
11/24/21	250	297	251	260	313	266

[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.

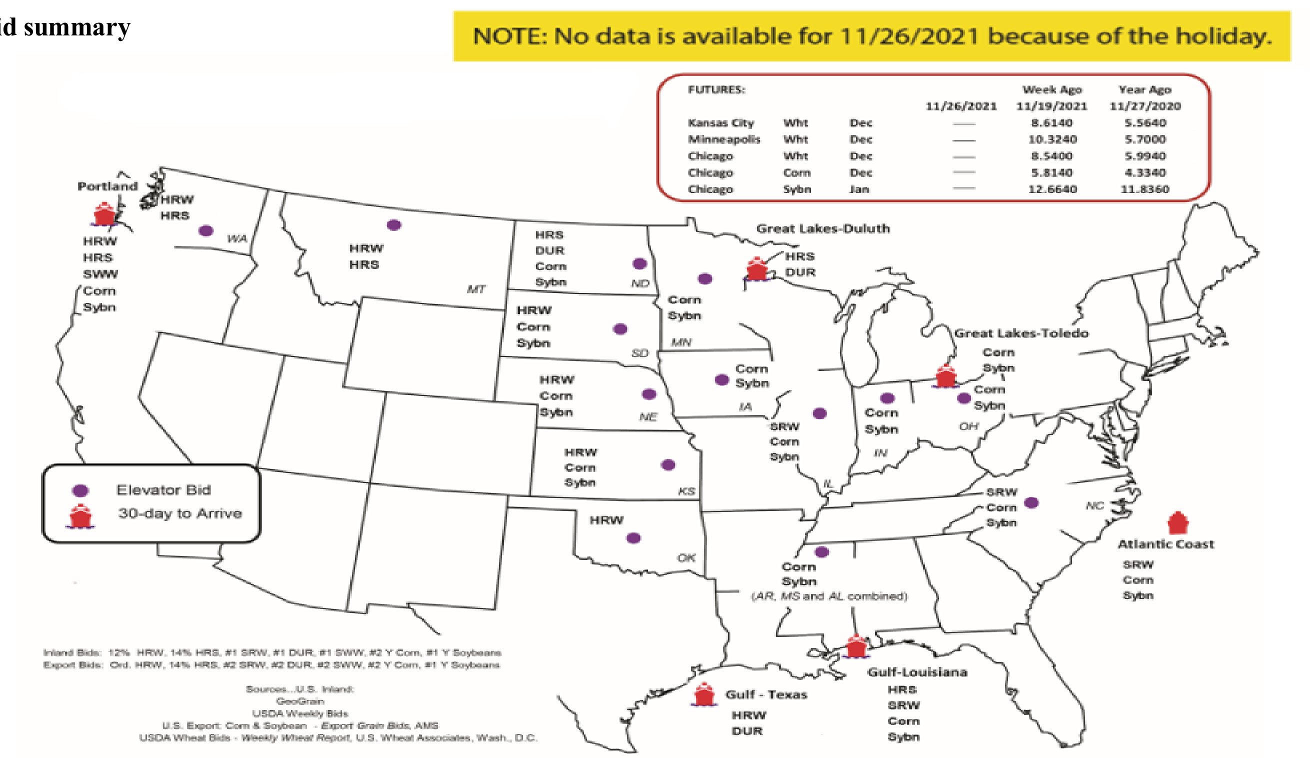
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	11/26/2021	11/19/2021
Corn	IL–Gulf	n/a	-0.70
Corn	NE–Gulf	n/a	-0.78
Soybean	IA–Gulf	n/a	-1.17
HRW	KS–Gulf	n/a	-2.77
HRS	ND–Portland	n/a	-1.37

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]
11/24/2021[p]	1,238	1,233	8,524	820	11,815	11/20/2021	3,826
11/17/2021[r]	1,257	1,512	8,086	1,091	11,946	11/13/2021	2,760
2021 YTD[r]	46,503	61,150	272,158	18,078	397,889	2021 YTD	132,073
2020 YTD[r]	34,501	52,654	252,617	18,538	358,310	2020 YTD	113,774
2021 YTD as % of 2020 YTD	135	116	108	98	111	% change YTD	116
Last 4 weeks as % of 2020[2]	70	69	98	72	87	Last 4wks. % 2020	136
Last 4 weeks as % of 4-year avg.[2]	155	136	129	133	133	Last 4wks. % 4 yr.	120
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	126,407
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622

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

[2] Compared with same 4-weeks in 2020 and prior 4-year average.

[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

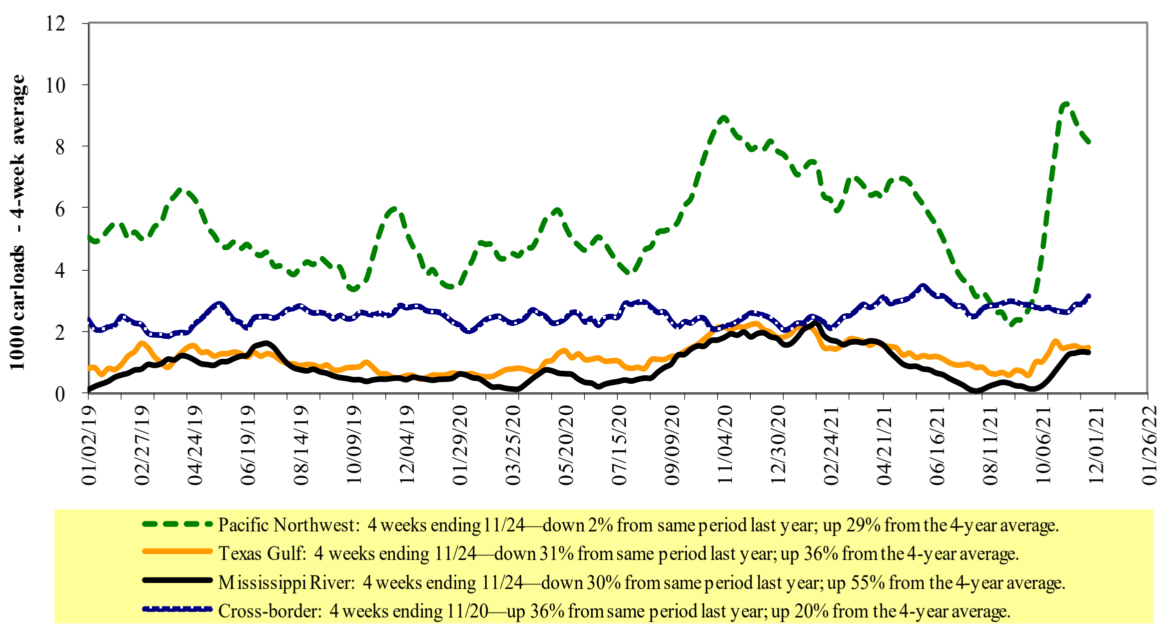
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 11/20/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,836	1,896	12,815	1,383	6,564	24,494	4,043	4,207
This week last year	2,164	3,331	11,727	1,290	6,692	25,204	5,991	5,661
2021 YTD	82,328	107,851	537,861	56,125	283,618	1,067,783	189,124	218,685
2020 YTD	79,853	114,377	533,233	51,417	256,848	1,035,728	206,176	226,284
2021 YTD as % of 2020 YTD	103	94	101	109	110	103	92	97
Last 4 weeks as % of 2020*	100	67	94	104	93	92	74	81
Last 4 weeks as % of 3-yr. avg.**	108	79	104	114	116	105	86	89
Total 2020	91,659	129,814	613,630	57,782	296,701	1,189,586	238,147	261,778

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

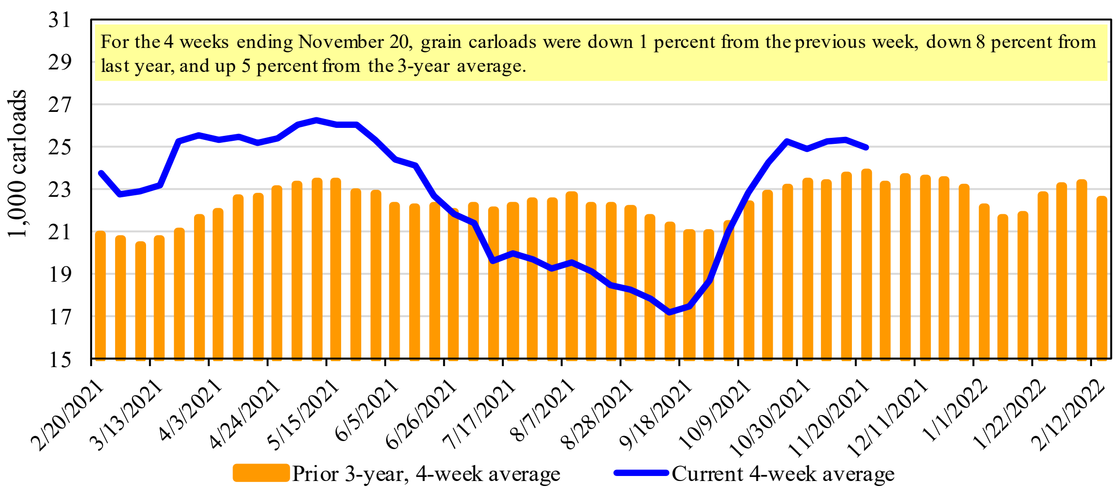
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 11/25/2021		Delivery period							
		Dec-21	Dec-20	Jan-22	Jan-21	Feb-22	Feb-21	Mar-22	Mar-21
BNSF[3]	COT grain units	0	no bids	0	0	0	no bids	no bids	no bids
	COT grain single-car	0	0	0	0	0	0	no bids	0
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	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.

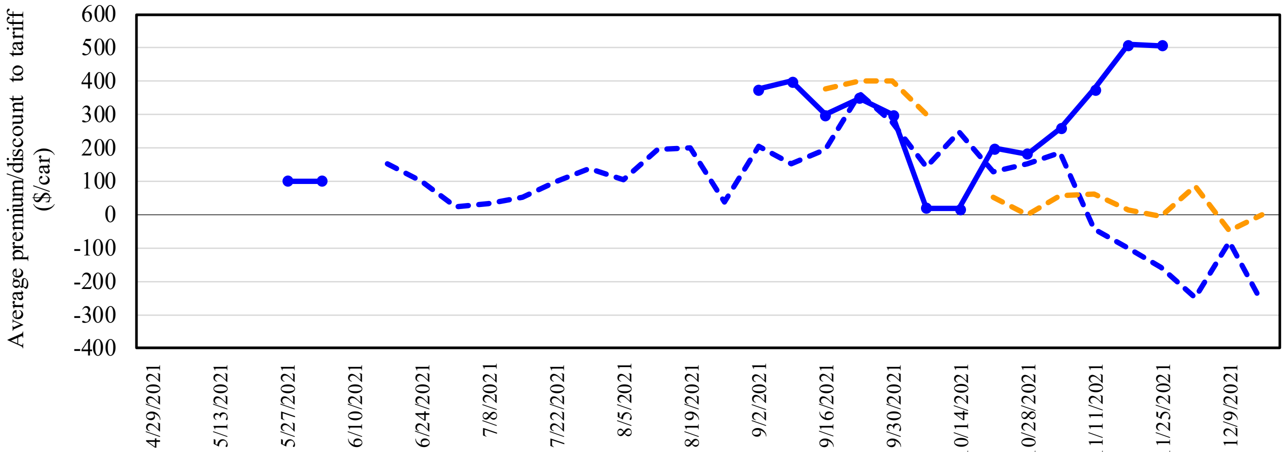
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 December 2021, secondary market



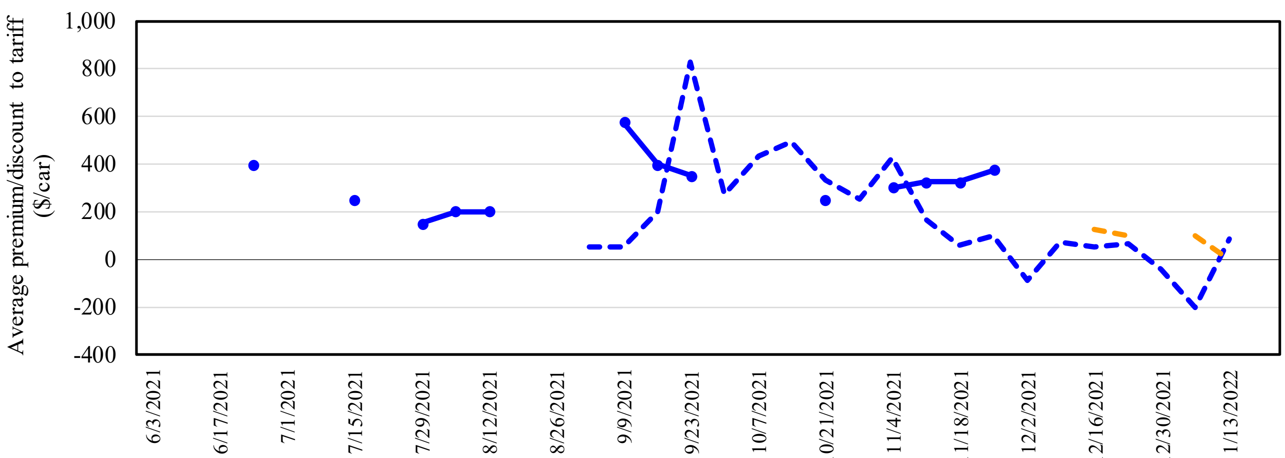
Shuttle — Non-shuttle — Shuttle prior 3-yr. avg. (same week) — Non-shuttle prior 3-yr. avg. (same week)

11/25/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$404	$611

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $3 this week and are $3 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 January 2022, secondary market



Shuttle — Non-shuttle — Shuttle prior 3-yr. avg. (same week) — Non-shuttle prior 3-yr. avg. (same week)

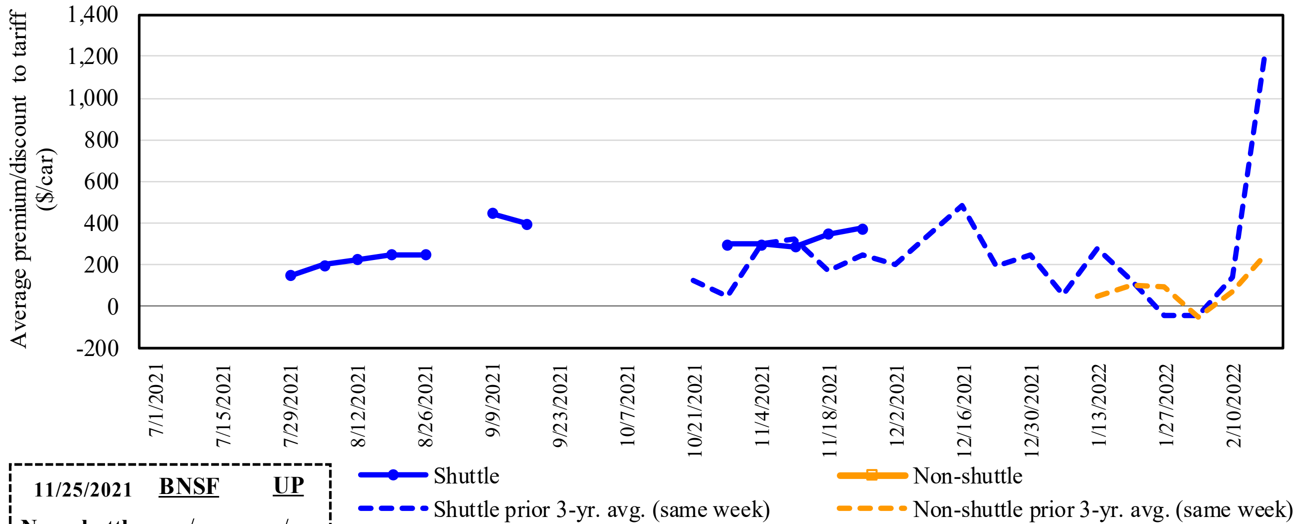
11/25/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$450	$300

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $50 this week and are $200 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 February 2022, secondary market



11/25/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$450	$300

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $25 this week and are $75 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:		Delivery period					
11/25/2021		Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-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**	**404**	**450**	**450**	**n/a**	**(100)**	**n/a**
	Change from last week	0	100	100	n/a	38	n/a
	Change from same week 2020	307	75	n/a	n/a	n/a	n/a
	UP-Pool	**611**	**300**	**300**	**n/a**	**n/a**	**n/a**
	Change from last week	(6)	0	(50)	n/a	n/a	n/a
	Change from same week 2020	598	0	50	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]

December 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	$167	$38.35	$1.04	4
	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	$294	$47.85	$1.30	5
	Sioux Falls, SD	Galveston-Houston, TX	$7,026	$0	$69.77	$1.90	3
	Colby, KS	Galveston-Houston, TX	$4,801	$322	$50.87	$1.38	5
	Amarillo, TX	Los Angeles, CA	$5,121	$448	$55.30	$1.51	7
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$332	$43.02	$1.09	9
	Toledo, OH	Raleigh, NC	$8,130	$0	$80.73	$2.05	4
	Des Moines, IA	Davenport, IA	$2,505	$70	$25.57	$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	$207	$41.77	$1.06	7
	Des Moines, IA	Los Angeles, CA	$5,880	$602	$64.37	$1.63	10
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$412	$40.15	$1.09	11
	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	$332	$50.42	$1.37	8
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	$528	$64.94	$1.77	7
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	$332	$42.22	$1.07	10
	Lincoln, NE	Galveston-Houston, TX	$4,080	$0	$40.52	$1.03	5
	Des Moines, IA	Amarillo, TX	$4,420	$260	$46.47	$1.18	7
	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	$383	$53.21	$1.45	8
	Toledo, OH	Huntsville, AL	$4,954	$0	$49.20	$1.34	0
	Grand Island, NE	Portland, OR	$5,360	$540	$58.59	$1.59	10

[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: December 2021				Fuel	Tariff rate plus fuel surcharge per:		Percent change[4]
Commodity	**Origin state**	**Destination region**	**Tariff rate per car[1]**	**surcharge 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	$230	$72.85	$1.98	6
	KS	Guadalajara, JA	$7,619	$719	$85.19	$2.32	7
	TX	Salinas Victoria, NL	$4,420	$138	$46.57	$1.27	4
Corn	IA	Guadalajara, JA	$9,102	$663	$99.77	$2.53	6
	SD	Celaya, GJ	$8,300	$0	$84.81	$2.15	2
	NE	Queretaro, QA	$8,322	$462	$89.75	$2.28	5
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,687	$450	$83.14	$2.11	5
	SD	Torreon, CU	$7,825	$0	$79.95	$2.03	2
Soybeans	MO	Bojay (Tula), HG	$8,647	$614	$94.63	$2.57	5
	NE	Guadalajara, JA	$9,207	$646	$100.67	$2.74	5
	IA	El Castillo, JA	$9,510	$0	$97.17	$2.64	1
	KS	Torreon, CU	$8,109	$466	$87.61	$2.38	5
Sorghum	NE	Celaya, GJ	$7,932	$597	$87.15	$2.21	6
	KS	Queretaro, QA	$8,108	$287	$85.77	$2.18	3
	NE	Salinas Victoria, NL	$6,713	$231	$70.94	$1.80	3
	NE	Torreon, CU	$7,225	$438	$78.29	$1.99	6

[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.

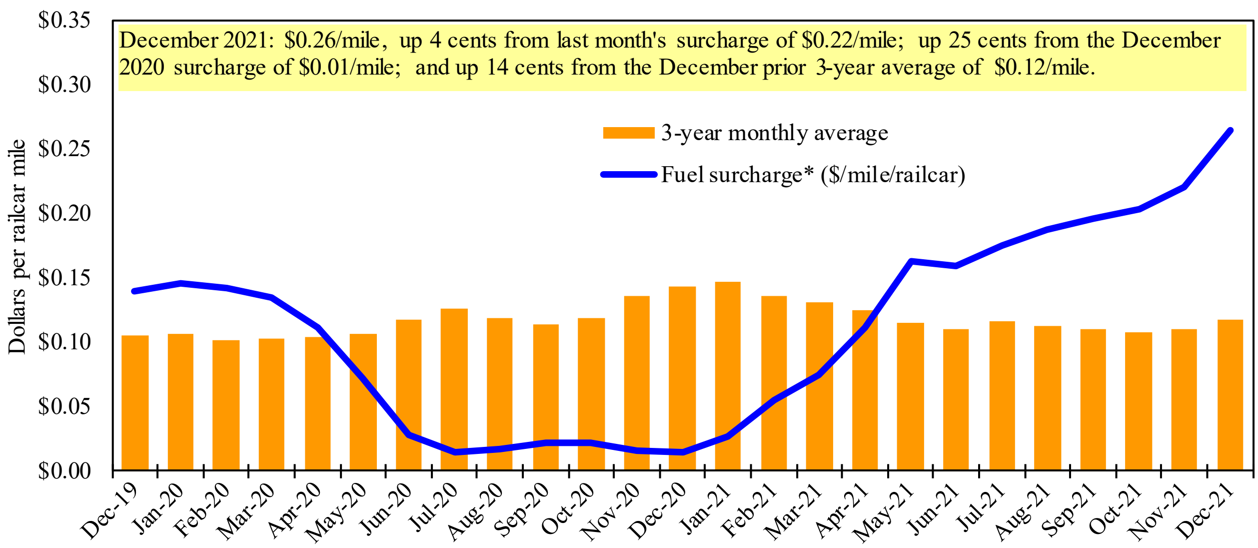
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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

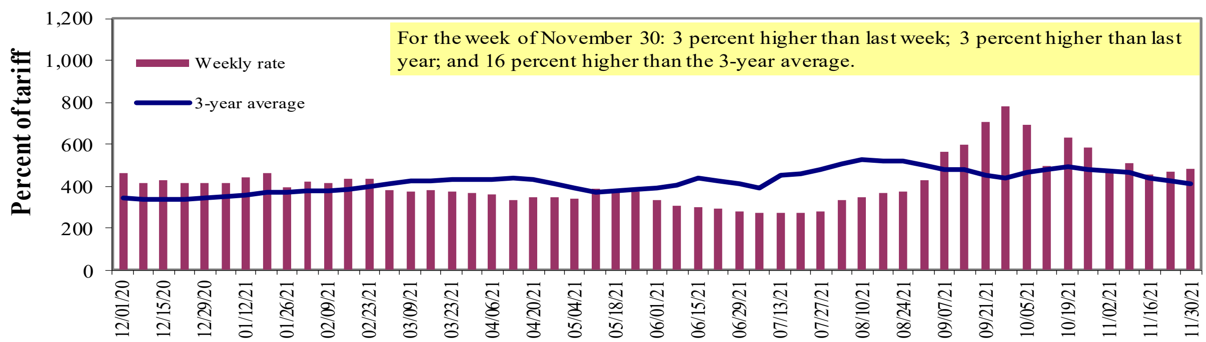
Railroad fuel surcharges, North American weighted average[1]



[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]	11/30/2021	-	485	480	374	480	480	345
	11/23/2021	-	465	468	373	448	448	332
$/ton	11/30/2021	-	25.80	22.27	14.92	22.51	19.39	10.83
	11/23/2021	-	24.74	21.72	14.88	21.01	18.10	10.42
Current week % change from the same week:								
	Last year	-	13	3	0	1	1	6
	3-year avg. [2]	-	17	16	15	31	31	14
Rate[1]	December	-	-	452	344	425	425	320
	February	-	-	422	315	338	338	273

[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

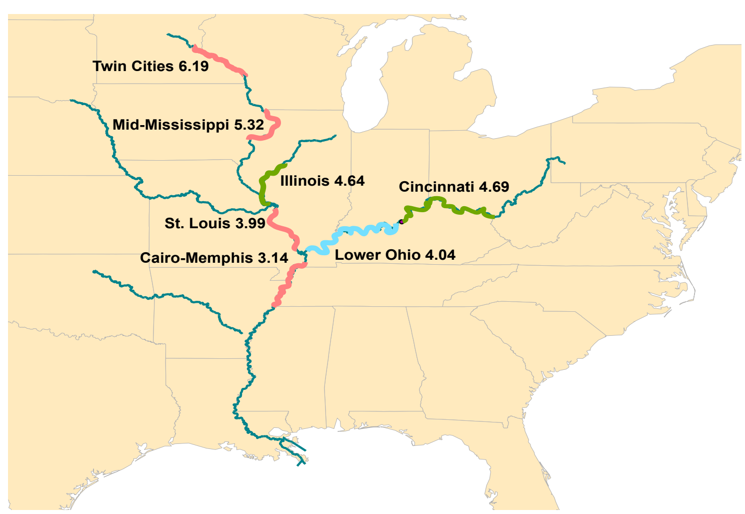
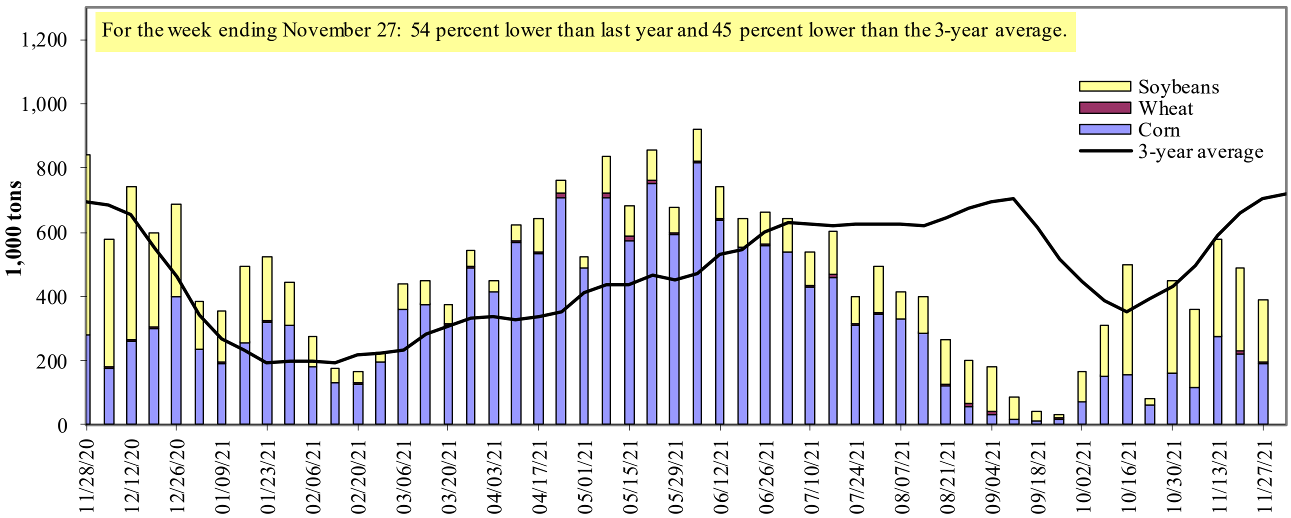


Figure 10

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 11/27/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	113	3	129	0	246
Winfield, MO (L25)	139	8	191	3	341
Alton, IL (L26)	178	5	192	3	379
Granite City, IL (L27)	192	5	190	3	390
Illinois River (La Grange)	39	0	11	0	50
Ohio River (Olmsted)	101	0	144	4	248
Arkansas River (L1)	1	10	36	0	47
Weekly total - 2021	294	14	369	7	684
Weekly total - 2020	452	6	813	6	1,277
2021 YTD[1]	21,732	1,543	9,468	252	32,994
2020 YTD[1]	16,633	1,666	15,740	209	34,248
2021 as % of 2020 YTD	131	93	60	120	96
Last 4 weeks as % of 2020[2]	70	91	70	18	70
Total 2020	18,942	1,765	19,205	237	40,149

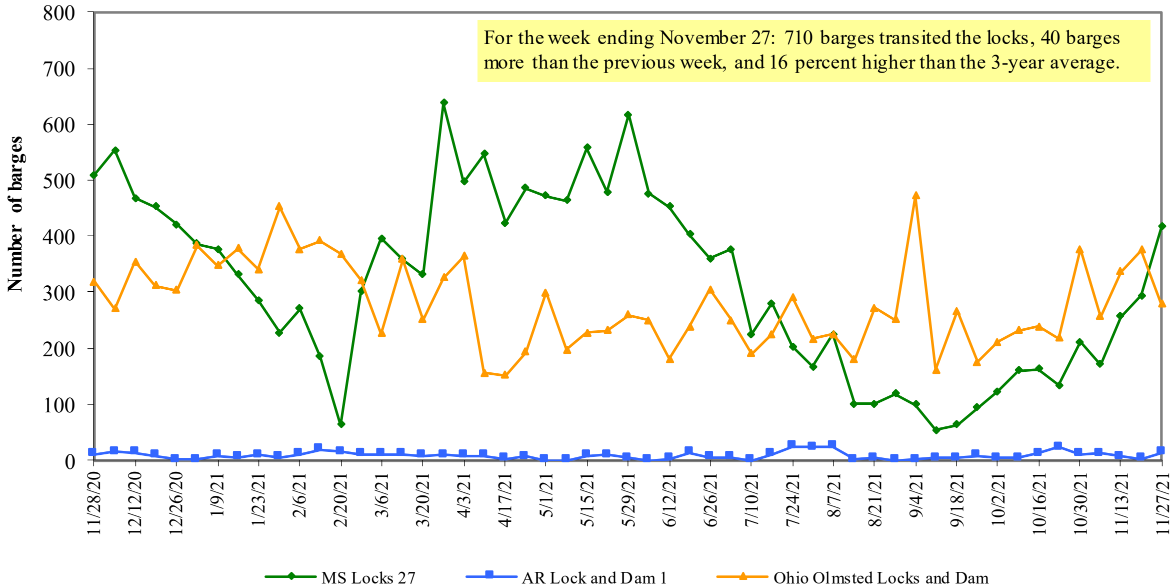
[1] Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye.
Total may not add exactly due to rounding.

[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

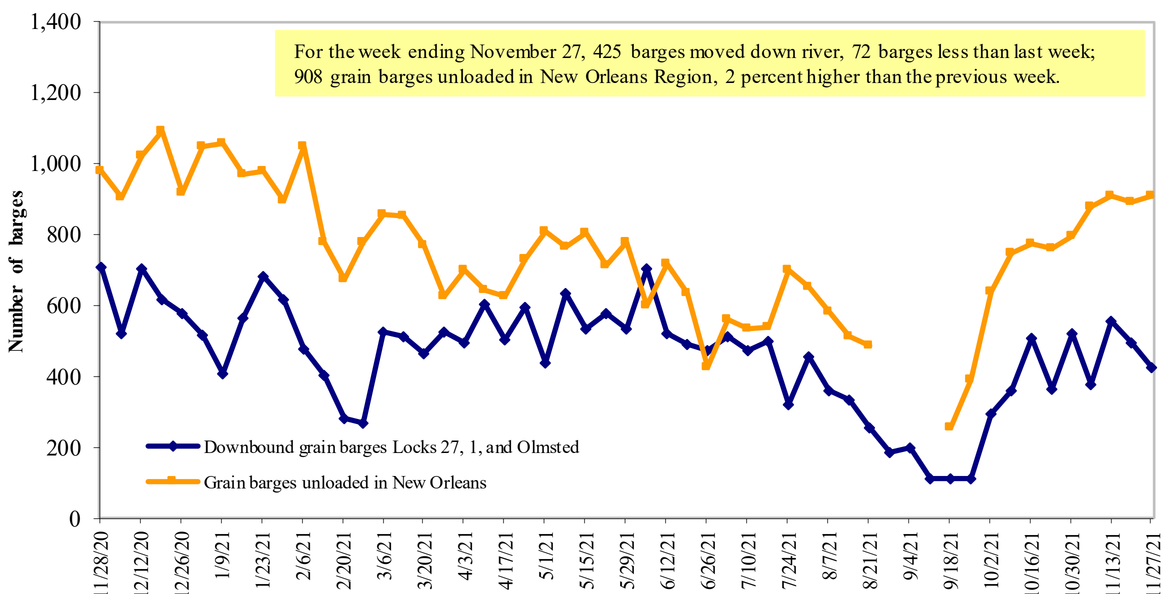
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/29/2021 (U.S. $/gallon)

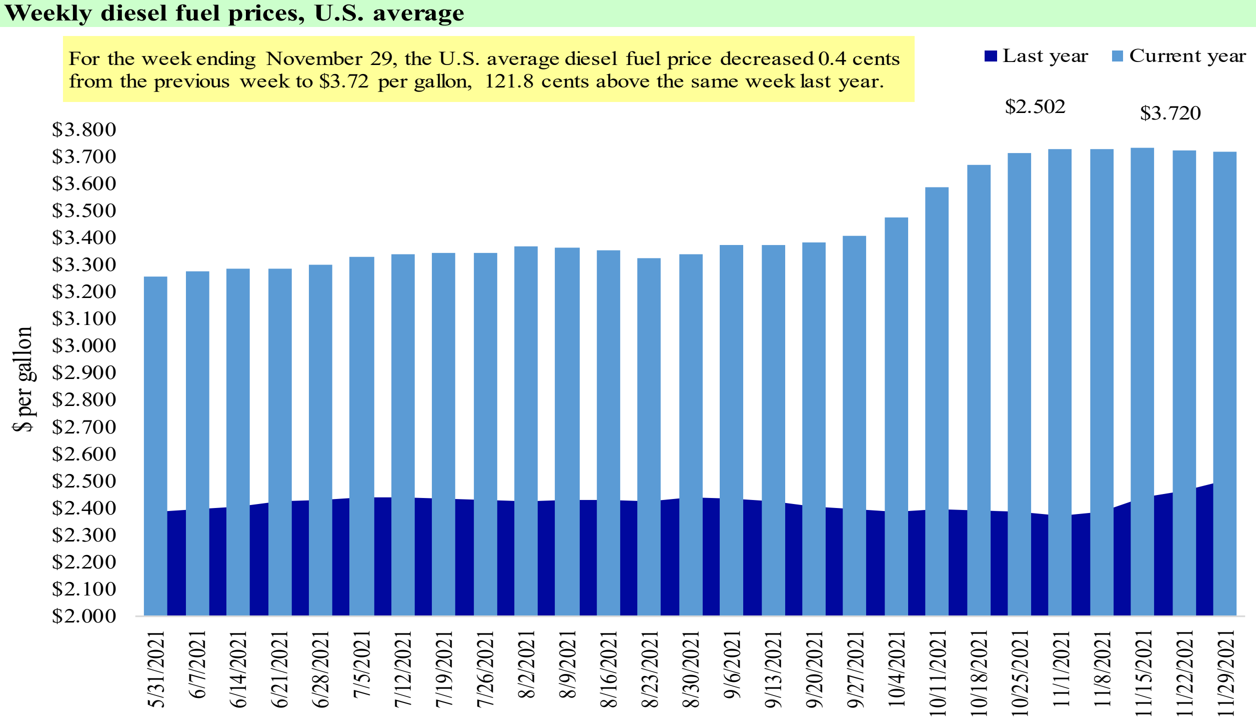
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.684	-0.006	1.144
	New England	3.666	0.000	1.091
	Central Atlantic	3.845	-0.002	1.102
	Lower Atlantic	3.586	-0.009	1.186
II	Midwest	3.602	-0.015	1.198
III	Gulf Coast	3.454	-0.003	1.200
IV	Rocky Mountain	3.824	-0.017	1.284
V	West Coast	4.450	0.029	1.410
	West Coast less California	4.032	0.023	1.290
	California	4.818	0.034	1.530
Total	United States	3.720	-0.004	1.218

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

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

Figure 13

Weekly diesel fuel prices, U.S. average



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

Grain Exports

Table 12

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

For the week ending	Wheat HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
Export balances[1]									
11/18/2021	2,028	602	1,280	823	53	4,786	25,701	17,360	47,848
This week year ago	1,531	394	1,521	2,503	172	6,120	27,920	25,211	59,252
Cumulative exports-marketing year[2]									
2021/22 YTD	3,612	1,456	2,557	1,733	97	9,454	8,708	18,810	36,973
2020/21 YTD	4,949	1,001	3,595	2,434	393	12,372	10,373	27,060	49,804
YTD 2021/22 as % of 2020/21	73	145	71	71	25	76	84	70	74
Last 4 wks. as % of same period 2020/21*	124	138	77	31	32	73	92	69	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 11/18/2021	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	9,724	7,877	23	14,817
Japan	2,964	4,829	(39)	11,082
China	12,003	11,025	9	7,920
Columbia	1,806	1,973	(8)	4,491
Korea	72	865	(92)	3,302
Top 5 importers	**26,570**	**26,568**	**0**	**41,613**
Total U.S. corn export sales	**34,409**	**36,922**	**(7)**	**53,145**
% of projected exports	54%	53%		
Change from prior week[2]	**1,429**	**1,666**		
Top 5 importers' share of U.S. corn export sales	77%	72%		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 11/18/2021	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	19,731	29,192	(32)	21,666
Mexico	2,503	2,935	(15)	4,754
Egypt	1,388	1,575	(12)	3,093
Indonesia	506	951	(47)	2,325
Japan	974	900	8	2,275
Top 5 importers	**25,101**	**35,553**	**(29)**	**34,113**
Total U.S. soybean export sales	**36,171**	**51,931**	**(30)**	**50,758**
% of projected exports	65%	84%		
change from prior week[2]	**1,565**	**768**		
Top 5 importers' share of U.S. soybean export sales	69%	68%		**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 11/18/2021	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	2,514	2,297	9	3,388
Philippines	2,151	2,434	(12)	3,121
Japan	1,577	1,706	(8)	2,567
Korea	858	1,169	(27)	1,501
Nigeria	1,566	854	83	1,490
China	848	2,056	(59)	1,268
Taiwan	597	771	(23)	1,187
Indonesia	67	607	(89)	1,131
Thailand	375	555	(32)	768
Italy	164	483	(66)	681
Top 10 importers	**10,717**	**12,931**	(17)	**17,102**
Total U.S. wheat export sales	**14,241**	**18,046**	(21)	**24,617**
% of projected exports	61%	67%		
change from prior week[2]	**568**	**796**		
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 11/25/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	122	121	101	12,567	14,504	87	40	41	15,966
Corn	0	61	0	12,430	8,855	140	13	9	9,969
Soybeans	715	922	78	11,774	11,330	104	121	194	14,028
Total	**837**	**1,104**	**76**	**36,771**	**34,689**	**106**	**90**	**114**	**39,963**
Mississippi Gulf									
Wheat	25	27	93	3,049	3,338	91	224	113	3,422
Corn	534	506	105	36,450	26,271	139	95	107	28,781
Soybeans	1,097	1,123	98	21,666	31,024	70	89	115	38,013
Total	**1,656**	**1,657**	**100**	**61,165**	**60,633**	**101**	**92**	**112**	**70,215**
Texas Gulf									
Wheat	55	0	n/a	3,669	4,130	89	144	110	4,248
Corn	19	19	98	570	682	84	106	198	723
Soybeans	152	72	211	1,579	1,502	105	97	292	2,098
Total	**226**	**91**	**248**	**5,819**	**6,313**	**92**	**110**	**185**	**7,068**
Interior									
Wheat	60	54	110	2,733	1,987	137	103	134	2,263
Corn	200	225	89	9,044	7,865	115	132	119	8,683
Soybeans	129	178	72	5,771	6,500	89	88	109	7,274
Total	**388**	**458**	**85**	**17,547**	**16,352**	**107**	**107**	**117**	**18,220**
Great Lakes									
Wheat	1	0	n/a	423	803	53	55	47	891
Corn	0	0	n/a	114	61	187	n/a	n/a	111
Soybeans	0	108	0	532	852	62	83	129	1,111
Total	**1**	**108**	**1**	**1,069**	**1,717**	**62**	**82**	**105**	**2,113**
Atlantic									
Wheat	0	0	n/a	125	65	191	0	0	65
Corn	0	0	n/a	81	33	246	533	21	33
Soybeans	108	77	141	1,742	1,407	124	96	152	1,870
Total	**108**	**77**	**141**	**1,949**	**1,505**	**129**	**89**	**145**	**1,968**
U.S. total from ports*									
Wheat	264	203	130	22,566	24,828	91	71	68	26,854
Corn	753	811	93	58,690	43,767	134	91	92	48,301
Soybeans	2,201	2,480	89	43,065	52,614	82	98	138	64,394
Total	**3,217**	**3,494**	**92**	**124,321**	**121,208**	**103**	**94**	**116**	**139,548**

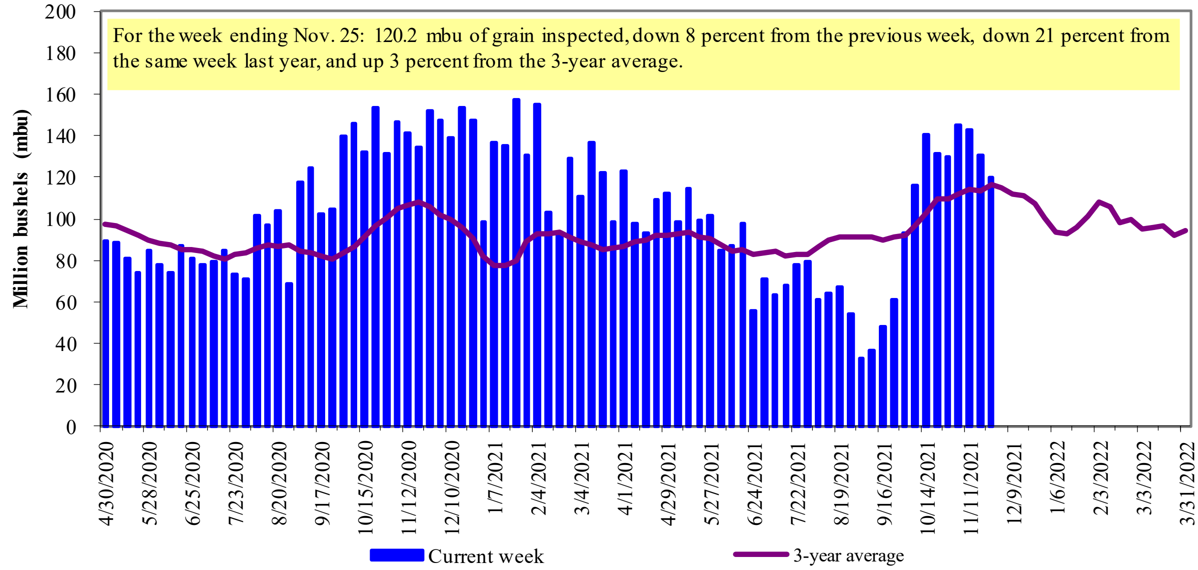
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

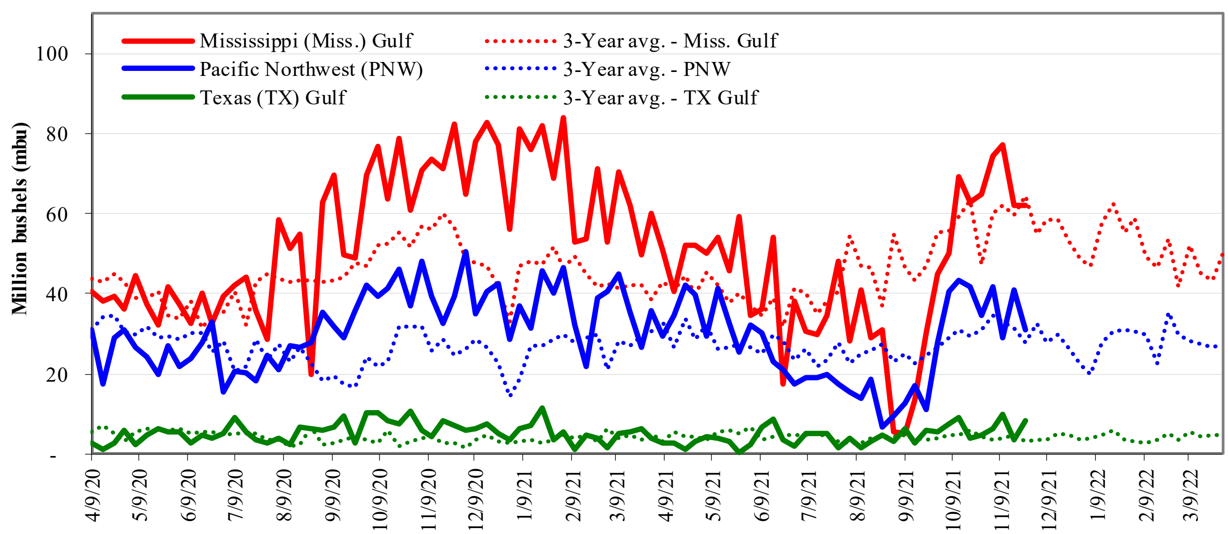


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 11/25/21 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	62.2	Last wk:	unchanged	up 146	up 8	down 24
PNW:	30.8	Last Year (same wk):	down 24	up 16	down 21	down 22
TX Gulf:	8.3	3-yr avg. (4-wk. mov. Avg):	up 1	up 121	up 8	down 3

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

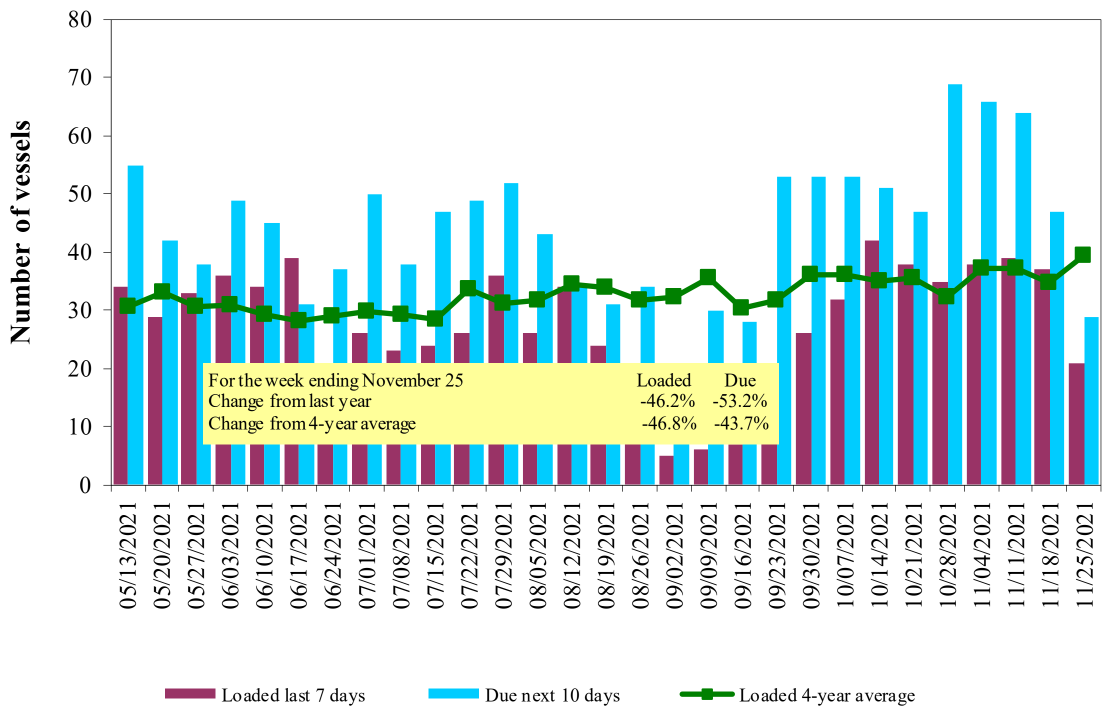
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/25/2021	26	21	29	n/a
11/18/2021	50	37	47	25
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

Note: n/a = not available due to the holiday; numbers may be underreported due to the holiday.

Source: USDA, Agricultural Marketing Service.

Figure 16

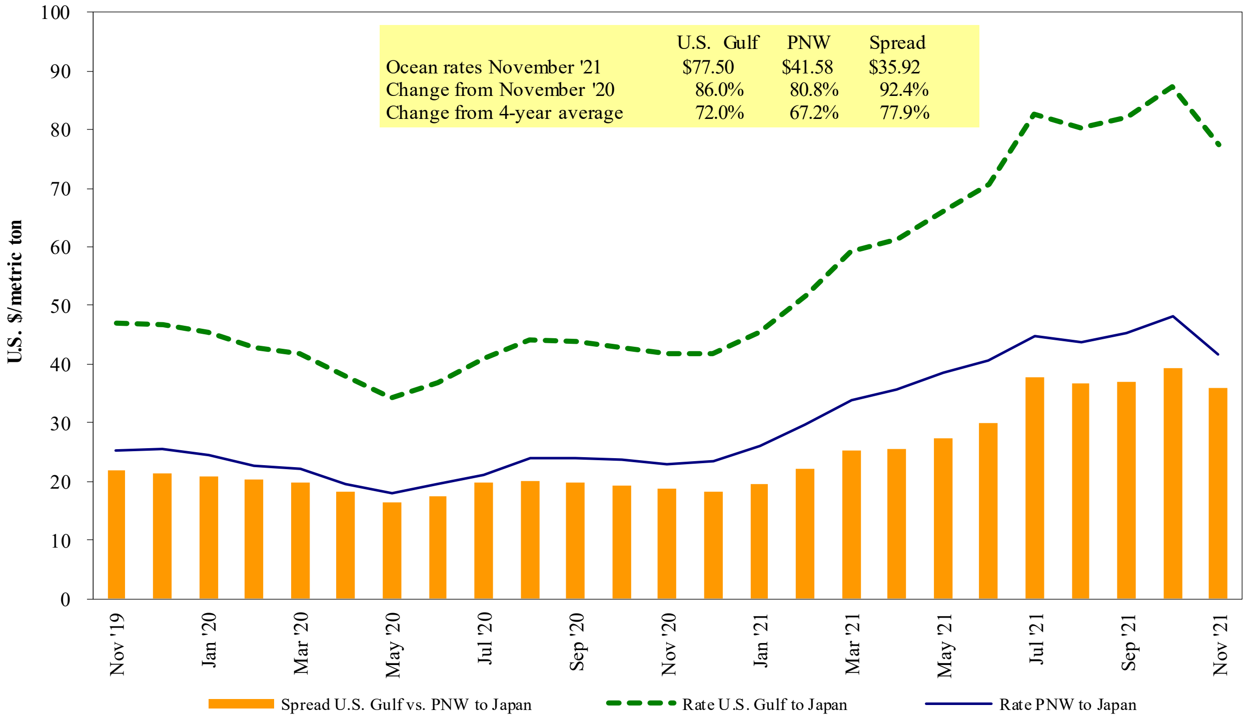
U.S. Gulf[1] vessel loading activity



[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 11/27/2021

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	Dec 1/10, 2021	65,000	76.00
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

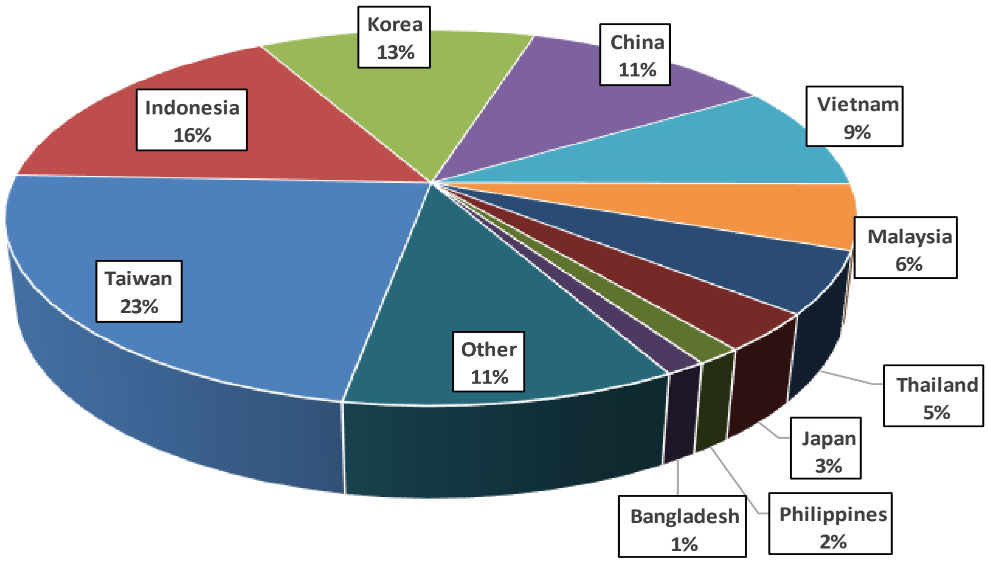
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

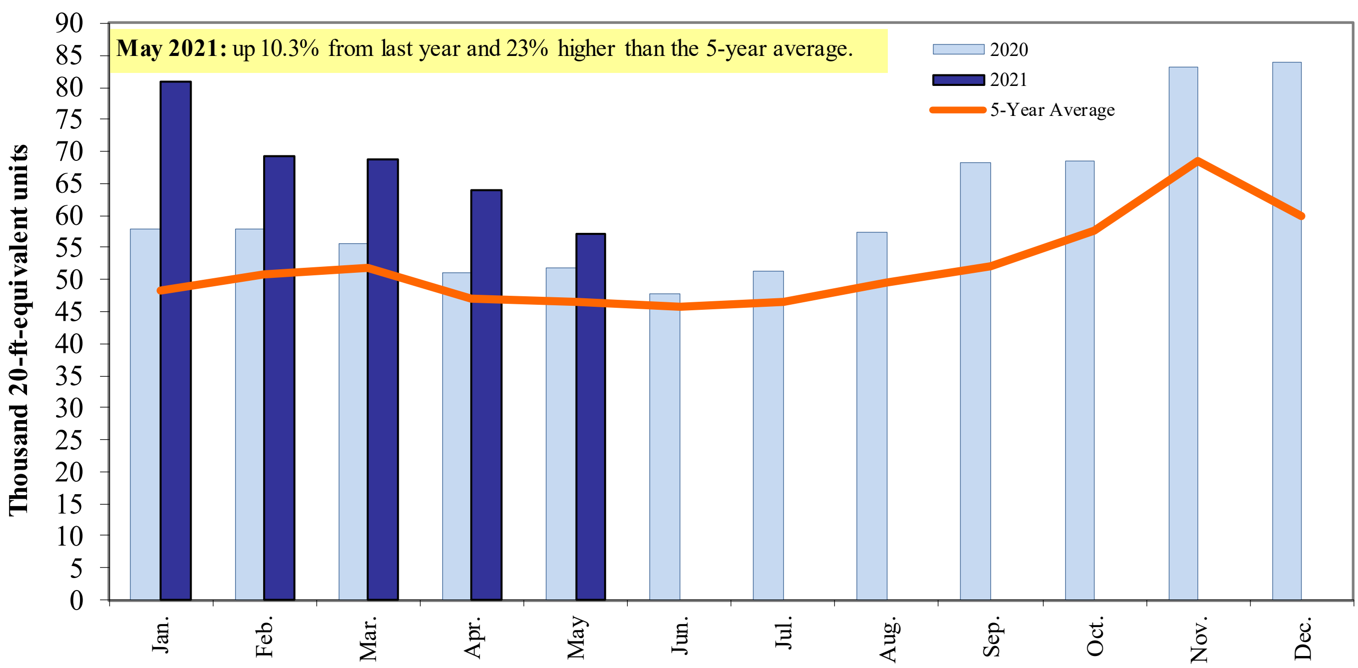
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2021



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.

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