USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE

# Grain Transportation Report

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

Contact Us

**July 22, 2021**

## Contents



---

**The next release is July 29, 2021**

## WEEKLY HIGHLIGHTS

### Bunge Completed Sales of 35 U.S. Elevators to Zen-Noh Grain

On July 9, Bunge North America announced completion of the sale of 35 interior elevators to Zen-Noh Grain Corp., a subsidiary of the National Federation of Agricultural Cooperative Associations of Japan. At the same time, Zen-Noh immediately divested itself of 9 of these facilities—along with a 10th terminal operated by Zen-Noh's Consolidated Grain and Barge Co. (CGB) affiliate—selling these to Viserion Grain, LLC. The sales to Viserion were made to maintain market competitiveness as mandated by the U.S. Department of Justice (DOJ). Most of these 35 elevators are located along the Mississippi River and its tributaries where grain shippers rely heavily on barges to deliver grain to the export markets. Headquartered in Covington, LA, Zen-Noh operates an export terminal in nearby Convent, LA. According to DOJ, Zen-Noh's divestiture ensures that other grain buyers will be well positioned to compete with larger companies in trading corn and soybeans. The preservation of competition should benefit farmers, as well as grain shippers.

### Weekly Grain Inspections Unchanged, but Year-to-Date Volume Remains Above 2020

For the week ending July 15, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 1.65 million metric tons (mmt). Total grain inspections were unchanged from the previous week, down 25 percent from last year, and down 23 percent from the 3-year average. From week to week, total wheat inspections increased 15 percent; corn remained unchanged; and soybeans decreased 28 percent. Although inspections during the last 4 weeks were 23 percent below last year and 24 percent below the 3-year average, year-to-date grain inspections are up 27 percent. From the previous week, total grain inspections decreased 15 percent in the Pacific Northwest (PNW) and decreased 5 percent in the Mississippi Gulf.

### FMC To Audit Top Container Lines on Billing of Detention and Demurrage Charges

On July 20, the Federal Maritime Commission (FMC) began auditing how carriers bill customers for detention and demurrage charges. The audit applies to container lines with the largest share of U.S. cargoes: Cosco Group, CMA CGM, Ocean Network Express, Evergreen, Maersk, Mediterranean Shipping Co., HMM, Yang Ming, and Hapag-Lloyd. FMC's newly formed Vessel-Operating Common Carrier Audit program and dedicated audit team will assess carrier compliance with the agency's rule on detention and demurrage. Each carrier must respond to the audit and provide monthly updates to regulators. The audit is a response to ongoing complaints from shippers, as well as recent guidelines by Congress and the White House to track unreasonable storage fees tied to persistent port congestion. This action also follows from the White House's "Executive Order on Promoting Competition in the American Economy," issued July 9. For more on the executive order's implications for maritime (and railroad) shipping, please see **this week's *GTR* feature**.

## Snapshots by Sector

### Export Sales

For the week ending July 8, **unshipped balances** of wheat, corn, and soybeans totaled 18.5 mmt. This was 5 percent lower than last week and 11 percent lower than the same time last year. Net **corn export sales** were 0.139 mmt, 20 percent lower than the past week. Net **soybean export sales** were 0.022 mmt, down 66 percent from the previous week. Net weekly **wheat export sales** were 0.425 mmt, up 45 percent from last week.

### Rail

U.S. Class I railroads originated 17,136 **grain carloads** during the week ending July 10. This was a 14-percent decrease from the previous week, 11 percent less than last year, and 21 percent fewer than the 3-year average.

Average July shuttle **secondary railcar** bids/offers (per car) were $92 below tariff for the week ending July 15. This was $105 more than last week. There were no shuttle bids/offers this week last year. There were no non-shuttle bids/offers this week.

### Barge

For the week ending July 17, **barged grain movements** totaled 748,927 tons. This was 7 percent higher than the previous week and 9 percent fewer than the same period last year.

For the week ending July 17, 499 grain barges **moved down river**—26 more barges than the previous week. There were 539 grain barges **unloaded in New Orleans**, 1 percent more than the previous week.

### Ocean

For the week ending July 15, 24 **oceangoing grain vessels** were loaded in the Gulf—20 percent fewer than the same period last year. Within the next 10 days (starting July 16), 47 vessels were expected to be loaded—34 percent more than the same period last year.

As of July 15, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $84.00. This was 1 percent less than the previous week. The rate from PNW to Japan was $45.00 per mt, 3 percent less than the previous week.

### Fuel

For the week ending July 19, the U.S. average **diesel fuel price** increased 0.6 cents from the previous week to $3.344 per gallon, 91.1 cents above the same week last year. This is the 12th consecutive week that the national average diesel price has increased.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* July 22, 2021.
Web: **http://dx.doi.org/10.9752/TS056.07-22-2021**

# Feature Article/Calendar

## Overview of the "Promoting Competition" Executive Order on Maritime and Rail Industries

On July 9, the White House issued an executive order (EO) to curb potential anticompetitive behavior among 72 industries, including the maritime and freight rail sectors. The order is premised on the principle that fair and competitive markets are foundational to the American economy. From this premise, the order addresses ongoing concerns from shippers and other stakeholders that several decades of industry consolidation have increased prices, suppressed innovation, and reduced choice.

In the maritime and freight rail industries, multiple rounds of consolidation have prompted repeated expressions of concern by shippers to the Federal Maritime Commission (FMC) and the Surface Transportation Board (STB). For years, shippers have routinely questioned whether rising rates, fees, and service issues are being driven by competition in the market or the lack thereof. Most recently, shippers have noted these longstanding issues are worsening, as rising U.S. demand for many commodities has strained supply chains, causing long delays in both ocean and rail transportation. As a corrective—by encouraging agencies to adopt "pro-competitive regulations"—the July 9 EO aims to ensure carriers operate efficiently and charge reasonable rates. Any changes stemming from the EO could significantly impact agricultural shippers.

This article provides historical context and discusses the details of some of the regulations recommended in the EO, with respect to the maritime and freight rail sectors.

### Consolidation and Regulatory Options in the Maritime Industry

Ocean carriers benefit from large economies of scale. Continually expanding ship sizes allow carriers to move larger volumes of cargo per voyage at a lower per-unit cost. In 1956, the first container ship carried 58 reinforced highway trailers on the deck of an old World War II tanker vessel. The latest generation of container ships can carry nearly 24,000 20-foot equivalent units. For shippers, one drawback of these bigger ships is they make fewer vessel calls at U.S. ports.

Another problem with bigger ships is that capacity can outpace demand and create overcapacity. Overcapacity lowers rates for U.S. importers and exporters, but reduces profits for ocean carriers. Nonetheless, despite ongoing overcapacity issues for the past decade, the industry has continued to build more and bigger ships. From 2012 to 2015, the global container vessel fleet's capacity grew 21 percent. Reduced profits from this excess capacity incentivized carriers to consolidate through mergers and acquisitions. Since 2016, the number of major ocean carriers in the U.S. east-west trade routes dropped from around 15 to fewer than 10. To better use capacity, carriers have formed vessel-sharing agreements. However, some exporters say these alliances further limit service options, particularly to smaller destinations.

Adding to these longstanding issues, a deluge of containerized imports to the United States over the past year, has made it extremely difficult to export containerized products—including agricultural products. Stresses posed by record-high volumes have created unprecedented challenges to secure ocean service, find available containers, and absorb rising freight rates and ancillary charges (*Grain Transportation Report*, June 24, 2021).

Even before the EO, FMC had taken steps to address port congestion and ocean carrier practices. In March 2020, the FMC initiated a fact-finding investigation to find operational solutions in delivery-system issues due to COVID-19. In November, the investigation expanded to examine ocean carriers operating in alliances and calling the Ports of Long Beach and Los Angeles or the Port of New York and New Jersey. On June 15, 2021, the U.S. House of Representatives' Subcommittee on the Coast Guard and Maritime Transportation held a hearing on impacts of shipping container shortages, delays, and excessive demand on the North American Supply Chain. Building on FMC's previous work to date, the EO outlines possible directions for FMC to consider in response to shipper concerns. For instance, the order urged FMC to

- Vigorously enforce existing rules against carriers charging American exporters exorbitant fees such as those for port delays;
- Consider further rulemakings to improve detention and demurrage practices and enforcement of related Shipping Act prohibitions; and
- Work with the Department of Justice (DOJ) to prosecute companies for anti-competitive conduct.

The order also establishes a White House Competition Council "to address overconcentration, monopolization, and unfair competition." Council members include the Secretary of Agriculture and Secretary of Transportation, and the FMC and STB chairs are also invited to participate.

**Consolidation and Regulation in the Freight Rail Industry**

The Staggers Rail Act of 1980 partially deregulated the railroad industry, enabling railroads to respond to competitive market forces and eliminating heavy-handed rate and route regulations. Increased price flexibility was intended to generate enough return that railroads could improve and invest in infrastructure. In this way, they would meet the capacity demands of shippers. Although some shippers would still face higher rates than others—particularly for routes and commodities with limited competition—all rates were required to be reasonable. At present, the main regulatory option for shippers facing limited competition is to dispute their rates through STB. However, shippers have described STB's processes as too lengthy and expensive to be effective.[1]

Between 1980 and 2000, railroads consolidated significantly, and railroad rates generally declined. In 1976, there were 30 Class I railroads, but there have been only 7 operating since the late 1990s.[2] In recent years, the top 2 railroads accounted for 68 percent of originated Class I grain carloads. The top four railroads are geographically concentrated, with two railroads dominating in each half of the country. Because of the rail industry's consolidation, many grain shippers are a "captive" market, having access to only a single railroad. Following a series of mergers in the 1990s, railroad rates between 2000 and 2019 generally increased. As rates have increased, regulatory attention has focused on enhancing competition within the consolidated industry and improving the rate dispute process.

In late 2016, STB proposed new reciprocal switching rules, which would require an incumbent railroad to interchange with nearby competitors for a set interchange fee. However, STB has not yet acted on the proposal. In 2019, the STB also proposed Final Offer Rate Review, a new rate dispute procedure for use in smaller cases.

The July 9 EO recommended STB consider "competitive access solutions" to shippers' concerns. This broad category of policies attempts to enhance competition within the constraints of the existing infrastructure and geography by providing shippers more access to competitors' network and service. The various competitive access solutions differ from each other in the details of exactly how they provide access to competitors. For instance, the EO encouraged STB to

- Revisit the idea of reciprocal switching;
- Consider adopting bottleneck rate rules, which would require railroads to quote a price for service to any interchange point on its network; and
- Look into concerns over interchange commitments (also known as "paper barriers"). These arrangements arise when a Class I railroad sells track to a short line railroad while requiring the short line to interchange only with that Class I.

**Looking Ahead**

The EO has already generated Federal regulatory action that could lead to changes in ocean and rail shipping. Following the order, the U.S. Department of Justice and FMC signed a Memorandum of Understanding on July 12 to foster increased cooperation and communication in their respective oversight and enforcement responsibilities of the ocean liner shipping industry.

In a July 9 statement, the current STB chair encouraged the other "Board members to prioritize and strongly consider the concepts embodied in several measures, which are already pending or have been recommended by Board staff or stakeholders, including but not limited to reforming the Board's competitive access policies; enhancing shipper visibility into first mile/last mile service; and increasing the practical accessibility of rate relief measures to shippers in market dominant situations."

*Jesse.Gastelle@usda.gov*, *April.Taylor@usda.gov*, *Kranti.Mulik@usda.gov*, *PeterA.Caffarelli@usda.gov*

[1] See, for example, shipper comments in STB docket Ex Parte No. 665 (Sub-No. 2), "Expanding Access to Rate Relief."
[2] Railroad classification depends on annual freight revenue. In 2019, Class I railroads earned revenues above $504.80 million; Class II railroads earned between $40.38 and $504.80 million; and Class III earned below $40.38 million.

# Grain Transportation Indicators

Table 1
**Grain transport cost indicators[1]**

| | Truck | Rail | | Barge | Ocean | |
|---|---|---|---|---|---|---|
| For the week ending | | Non-Shuttle | Shuttle | | Gulf | Pacific |
| 07/21/21 | 224 | 292 | 217 | 153 | 376 | 319 |
| 07/14/21 | 224 | 292 | 214 | 153 | 380 | 328 |

[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.

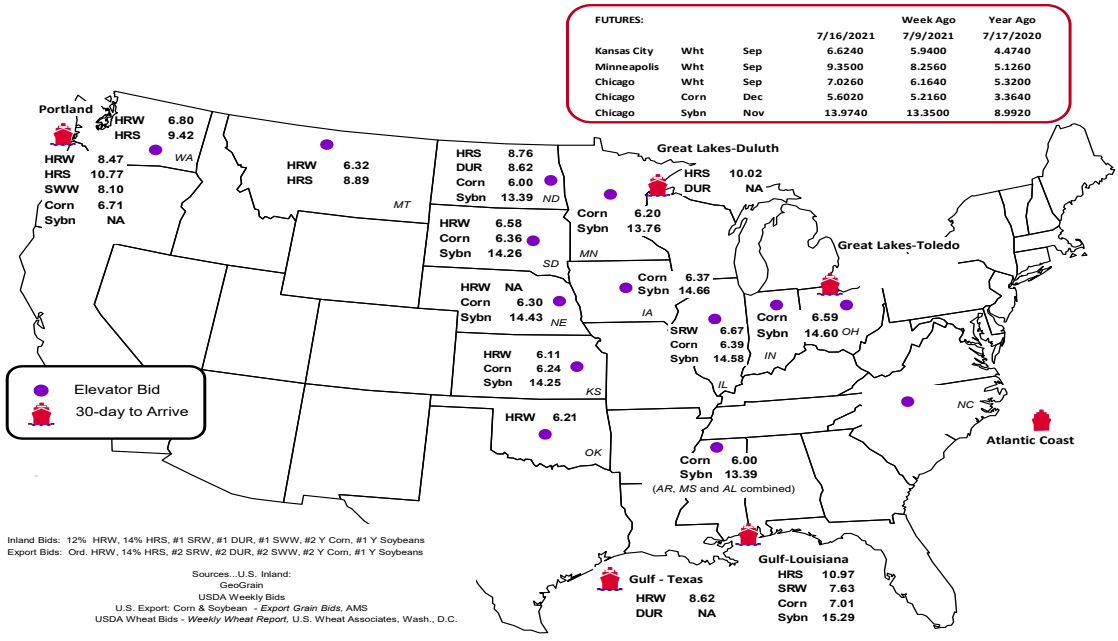
Table 2
**Market Update: U.S. origins to export position price spreads ($/bushel)**

| Commodity | Origin–destination | 7/16/2021 | 7/9/2021 |
|---|---|---|---|
| Corn | IL–Gulf | -0.62 | -0.44 |
| Corn | NE–Gulf | -0.71 | -0.52 |
| Soybean | IA–Gulf | -0.63 | -0.62 |
| HRW | KS–Gulf | -2.51 | -2.40 |
| HRS | ND–Portland | -2.01 | -1.85 |

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] |
|---|---|---|---|---|---|---|---|
| 7/14/2021[p] | 22 | 1,218 | 3,302 | 0 | 4,542 | 7/10/2021 | 2,812 |
| 7/07/2021[r] | 106 | 659 | 2,960 | 0 | 3,725 | 7/3/2021 | 2,037 |
| 2021 YTD[r] | 35,100 | 40,983 | 171,023 | 9,887 | 256,993 | 2021 YTD | 77,378 |
| 2020 YTD[r] | 11,407 | 24,262 | 129,497 | 5,523 | 170,689 | 2020 YTD | 66,808 |
| 2021 YTD as % of 2020 YTD | 308 | 169 | 132 | 179 | 151 | % change YTD | 116 |
| Last 4 weeks as % of 2020[2] | 77 | 88 | 81 | 0 | 80 | Last 4wks. % 2020 | 113 |
| Last 4 weeks as % of 4-year avg.[2] | 47 | 92 | 73 | 0 | 71 | Last 4wks. % 4 yr. | 114 |
| Total 2020 | 45,294 | 64,116 | 299,882 | 24,458 | 433,750 | Total 2020 | 126,407 |
| Total 2019 | 40,974 | 51,167 | 251,181 | 16,192 | 359,514 | Total 2019 | 127,622 |

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

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

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

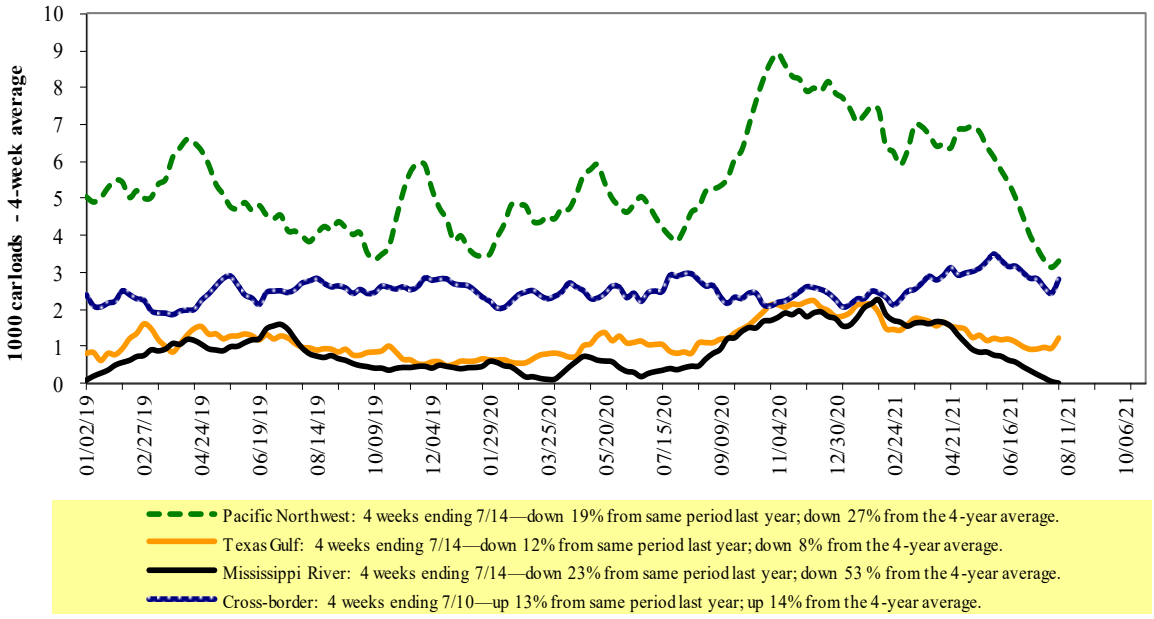
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.**

Source: USDA, Agricultural Marketing Service.

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

Figure 2

**Rail deliveries to port**




Source: USDA, Agricultural Marketing Service.

Table 4

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

| For the week ending: | East | | West | | | U.S. total | Canada | |
|---|---|---|---|---|---|---|---|---|
| 7/10/2021 | CSXT | NS | BNSF | KCS | UP | | CN | CP |
| This week | 2,087 | 2,212 | 7,715 | 896 | 4,226 | 17,136 | 2,245 | 2,891 |
| This week last year | 1,209 | 2,440 | 9,389 | 1,034 | 5,184 | 19,256 | 4,510 | 4,097 |
| 2021 YTD | 51,996 | 69,374 | 335,591 | 29,973 | 172,169 | 659,103 | 120,688 | 140,727 |
| 2020 YTD | 45,922 | 65,495 | 297,892 | 28,966 | 139,034 | 577,309 | 111,485 | 124,680 |
| 2021 YTD as % of 2020 YTD | 113 | 106 | 113 | 103 | 124 | 114 | 108 | 113 |
| Last 4 weeks as % of 2020* | 121 | 93 | 91 | 108 | 106 | 98 | 68 | 88 |
| Last 4 weeks as % of 3-yr. avg.** | 100 | 84 | 82 | 104 | 102 | 89 | 75 | 93 |
| Total 2020 | 91,659 | 130,335 | 613,630 | 57,782 | 296,701 | 1,190,107 | 238,468 | 261,778 |

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

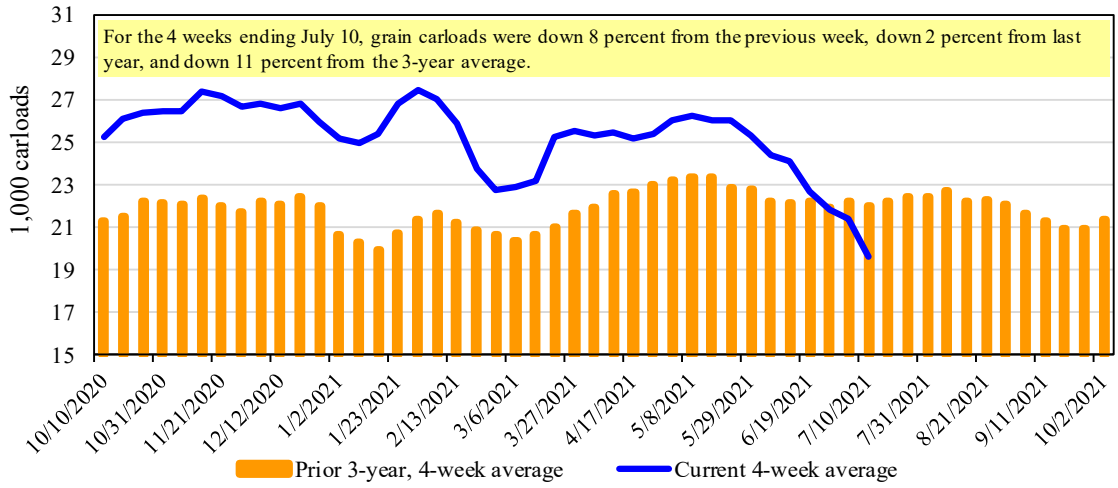
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

**Total weekly U.S. Class I railroad grain carloads**




Source: Association of American Railroads.

Table 5

**Railcar auction offerings[1] ($/car)[2]**

| For the week ending: | | Delivery period | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| 7/15/2021 | | Jul-21 | Jul-20 | Aug-21 | Aug-20 | Sep-21 | Sep-20 | Oct-21 | Oct-20 |
| BNSF[3] | COT grain units | no offer | n/a | 0 | 0 | no bids | 0 | no bids | 0 |
| | COT grain single-car | no offer | n/a | 0 | 0 | 0 | 3 | 2 | 0 |
| UP[4] | GCAS/Region 1 | no offer | n/a | no offer | no offer | no offer | no offer | n/a | no offer |
| | GCAS/Region 2 | no offer | n/a | no offer | no bid | no offer | no bid | n/a | no offer |

[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.

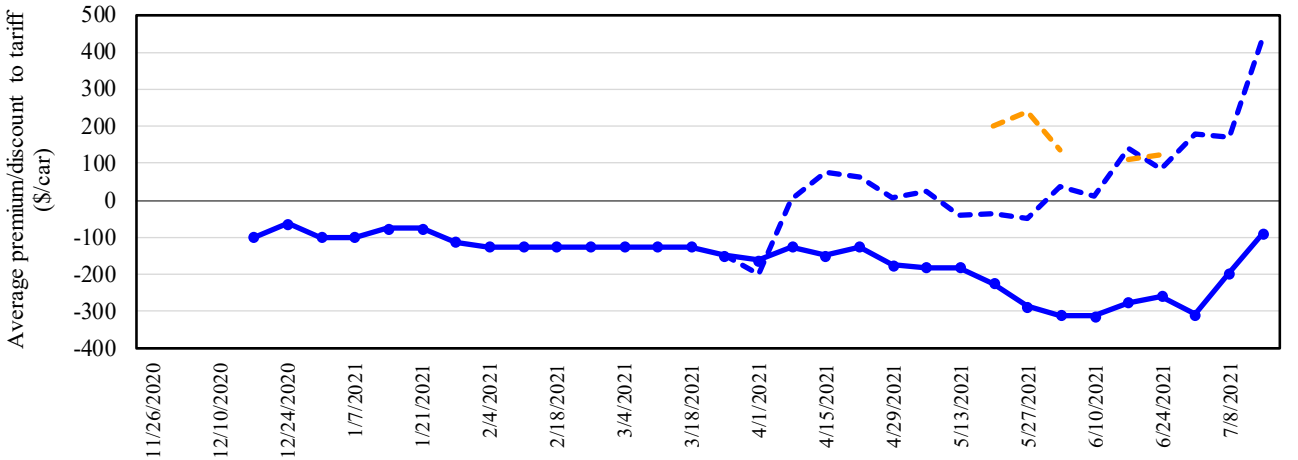
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 July 2021, secondary market**

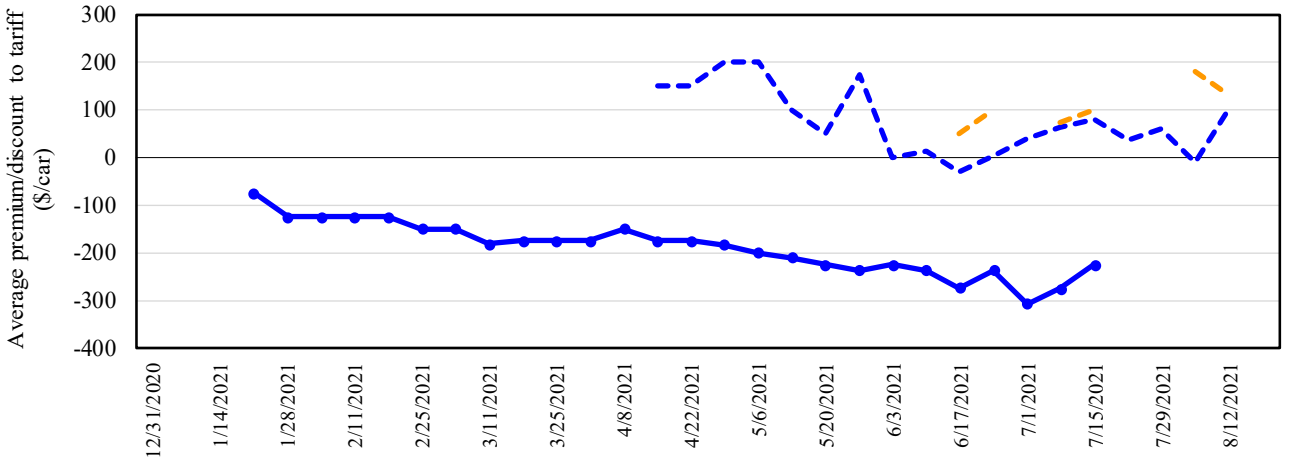



| 7/15/2021 | BNSF | UP |
|---|---|---|
| Non-shuttle | n/a | n/a |
| Shuttle | -$233 | $50 |

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $105 this week and are $29 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 August 2021, secondary market**



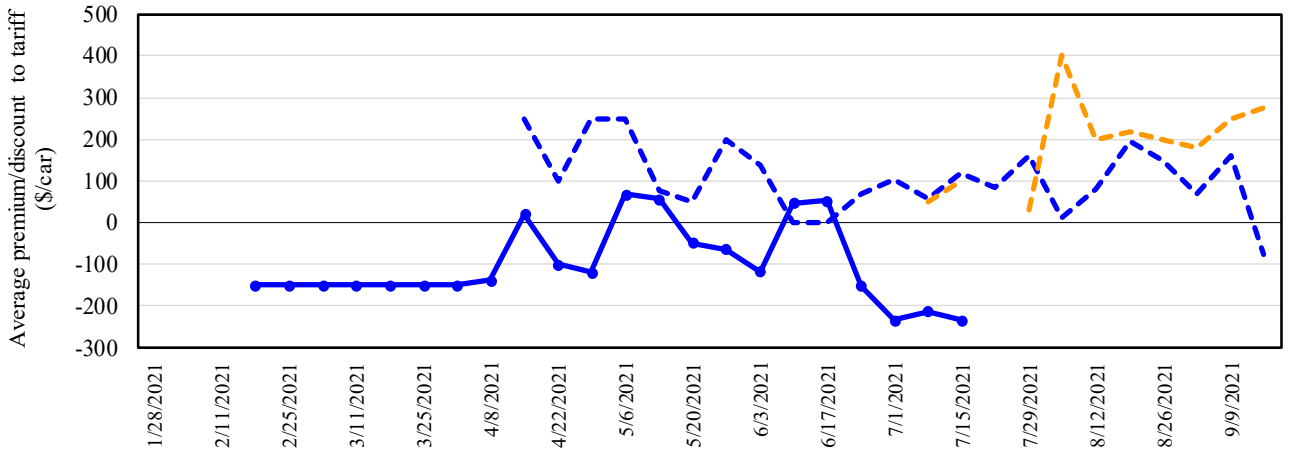

| 7/15/2021 | BNSF | UP |
|---|---|---|
| Non-shuttle | n/a | n/a |
| Shuttle | -$288 | -$163 |

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $50 this week and are $150 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 September 2021, secondary market**




| 7/15/2021 | BNSF | UP |
|---|---|---|
| Non-shuttle | n/a | n/a |
| Shuttle | -$267 | -$200 |

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $21 this week and are $302 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: 7/15/2021 | Delivery period | | | | | |
|---|---|---|---|---|---|---|---|
| | | Jul-21 | Aug-21 | Sep-21 | Oct-21 | Nov-21 | Dec-21 |
| Non-shuttle | **BNSF-GF** | **n/a** | **n/a** | **n/a** | **n/a** | **n/a** | **n/a** |
| | Change from last week | n/a | n/a | n/a | n/a | n/a | n/a |
| | Change from same week 2020 | n/a | n/a | n/a | n/a | n/a | n/a |
| | **UP-Pool** | **n/a** | **n/a** | **n/a** | **n/a** | **n/a** | **n/a** |
| | Change from last week | n/a | n/a | n/a | n/a | n/a | n/a |
| | Change from same week 2020 | n/a | n/a | n/a | n/a | n/a | n/a |
| Shuttle | **BNSF-GF** | **(233)** | **(288)** | **(267)** | **694** | **500** | **n/a** |
| | Change from last week | 48 | 38 | (42) | (19) | n/a | n/a |
| | Change from same week 2020 | n/a | (538) | (567) | (56) | n/a | n/a |
| | **UP-Pool** | **50** | **(163)** | **(200)** | **700** | **n/a** | **n/a** |
| | Change from last week | 163 | 63 | 0 | 12 | n/a | n/a |
| | Change from same week 2020 | n/a | (300) | (250) | 275 | 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]**

| July 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 | $116 | $37.85 | $1.03 | 5 |
| | Grand Forks, ND | Duluth-Superior, MN | $4,208 | $0 | $41.79 | $1.14 | -3 |
| | Wichita, KS | Los Angeles, CA | $7,115 | $0 | $70.66 | $1.92 | -2 |
| | Wichita, KS | New Orleans, LA | $4,525 | $205 | $46.97 | $1.28 | 3 |
| | Sioux Falls, SD | Galveston-Houston, TX | $6,851 | $0 | $68.03 | $1.85 | -2 |
| | Colby, KS | Galveston-Houston, TX | $4,801 | $224 | $49.90 | $1.36 | 3 |
| | Amarillo, TX | Los Angeles, CA | $5,121 | $312 | $53.95 | $1.47 | 4 |
| Corn | Champaign-Urbana, IL | New Orleans, LA | $3,900 | $231 | $41.03 | $1.04 | 4 |
| | Toledo, OH | Raleigh, NC | $7,833 | $0 | $77.79 | $1.98 | 15 |
| | Des Moines, IA | Davenport, IA | $2,455 | $49 | $24.87 | $0.63 | 3 |
| | Indianapolis, IN | Atlanta, GA | $5,979 | $0 | $59.37 | $1.51 | 3 |
| | Indianapolis, IN | Knoxville, TN | $5,040 | $0 | $50.05 | $1.27 | 3 |
| | Des Moines, IA | Little Rock, AR | $3,900 | $144 | $40.16 | $1.02 | 5 |
| | Des Moines, IA | Los Angeles, CA | $5,780 | $419 | $61.56 | $1.56 | 7 |
| Soybeans | Minneapolis, MN | New Orleans, LA | $3,631 | $241 | $38.45 | $1.05 | 6 |
| | Toledo, OH | Huntsville, AL | $6,595 | $0 | $65.49 | $1.78 | 17 |
| | Indianapolis, IN | Raleigh, NC | $7,125 | $0 | $70.75 | $1.93 | 3 |
| | Indianapolis, IN | Huntsville, AL | $5,247 | $0 | $52.11 | $1.42 | 3 |
| | Champaign-Urbana, IL | New Orleans, LA | $4,645 | $231 | $48.42 | $1.32 | 4 |
| **Shuttle train** | | | | | | | |
| Wheat | Great Falls, MT | Portland, OR | $4,018 | $0 | $39.90 | $1.09 | -3 |
| | Wichita, KS | Galveston-Houston, TX | $4,236 | $0 | $42.07 | $1.14 | -3 |
| | Chicago, IL | Albany, NY | $6,376 | $0 | $63.32 | $1.72 | -10 |
| | Grand Forks, ND | Portland, OR | $5,676 | $0 | $56.37 | $1.53 | -2 |
| | Grand Forks, ND | Galveston-Houston, TX | $5,996 | $0 | $59.54 | $1.62 | -2 |
| | Colby, KS | Portland, OR | $6,012 | $368 | $63.35 | $1.72 | 4 |
| Corn | Minneapolis, MN | Portland, OR | $5,180 | $0 | $51.44 | $1.31 | 0 |
| | Sioux Falls, SD | Tacoma, WA | $5,140 | $0 | $51.04 | $1.30 | 0 |
| | Champaign-Urbana, IL | New Orleans, LA | $3,820 | $231 | $40.23 | $1.02 | 4 |
| | Lincoln, NE | Galveston-Houston, TX | $3,880 | $0 | $38.53 | $0.98 | 0 |
| | Des Moines, IA | Amarillo, TX | $4,320 | $181 | $44.70 | $1.14 | 5 |
| | Minneapolis, MN | Tacoma, WA | $5,180 | $0 | $51.44 | $1.31 | 0 |
| | Council Bluffs, IA | Stockton, CA | $5,100 | $0 | $50.65 | $1.29 | 2 |
| Soybeans | Sioux Falls, SD | Tacoma, WA | $5,850 | $0 | $58.09 | $1.58 | 0 |
| | Minneapolis, MN | Portland, OR | $5,900 | $0 | $58.59 | $1.59 | 0 |
| | Fargo, ND | Tacoma, WA | $5,750 | $0 | $57.10 | $1.55 | 0 |
| | Council Bluffs, IA | New Orleans, LA | $4,875 | $267 | $51.06 | $1.39 | 4 |
| | Toledo, OH | Huntsville, AL | $4,945 | $0 | $49.11 | $1.34 | 3 |
| | Grand Island, NE | Portland, OR | $5,260 | $377 | $55.97 | $1.52 | 5 |

[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: July 2021 | | | | | | | |
|---|---|---|---|---|---|---|---|
| Commodity | Origin state | Destination region | Tariff rate per car[1] | Fuel surcharge per car[2] | Tariff rate plus fuel surcharge per: metric ton[3] | bushel[3] | Percent change[4] Y/Y |
| Wheat | MT | Chihuahua, CI | $7,384 | $0 | $75.45 | $2.05 | -2 |
| | OK | Cuautitlan, EM | $6,813 | $160 | $71.25 | $1.94 | 2 |
| | KS | Guadalajara, JA | $7,531 | $703 | $84.13 | $2.29 | 4 |
| | TX | Salinas Victoria, NL | $4,347 | $97 | $45.41 | $1.23 | 2 |
| Corn | IA | Guadalajara, JA | $8,902 | $604 | $97.13 | $2.46 | 3 |
| | SD | Celaya, GJ | $8,140 | $0 | $83.17 | $2.11 | 0 |
| | NE | Queretaro, QA | $8,300 | $330 | $88.18 | $2.24 | 3 |
| | SD | Salinas Victoria, NL | $6,905 | $0 | $70.55 | $1.79 | 0 |
| | MO | Tlalnepantla, EM | $7,665 | $322 | $81.61 | $2.07 | 3 |
| | SD | Torreon, CU | $7,690 | $0 | $78.57 | $1.99 | 0 |
| Soybeans | MO | Bojay (Tula), HG | $8,547 | $567 | $93.12 | $2.53 | 3 |
| | NE | Guadalajara, JA | $9,157 | $593 | $99.61 | $2.71 | 3 |
| | IA | El Castillo, JA | $9,410 | $0 | $96.15 | $2.61 | -1 |
| | KS | Torreon, CU | $8,014 | $411 | $86.08 | $2.34 | 3 |
| Sorghum | NE | Celaya, GJ | $7,772 | $535 | $84.88 | $2.15 | 3 |
| | KS | Queretaro, QA | $8,108 | $200 | $84.88 | $2.15 | 2 |
| | NE | Salinas Victoria, NL | $6,713 | $161 | $70.23 | $1.78 | 2 |
| | NE | Torreon, CU | $7,092 | $376 | $76.31 | $1.94 | 3 |

[1]Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

[2]Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

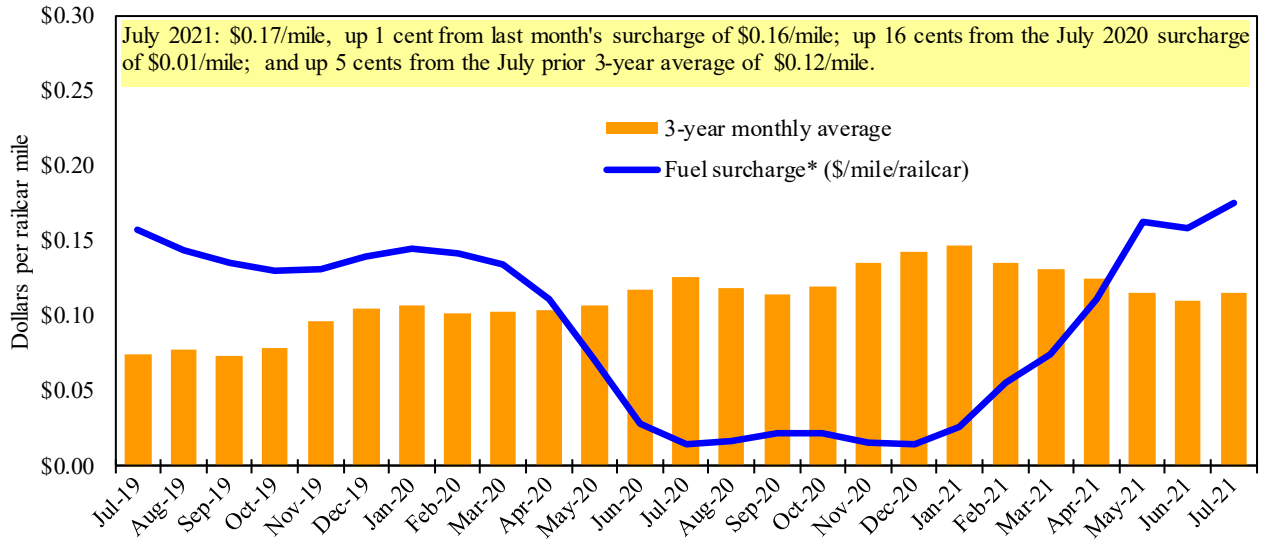
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

Figure 7

**Railroad fuel surcharges, North American weighted average[1]**




[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

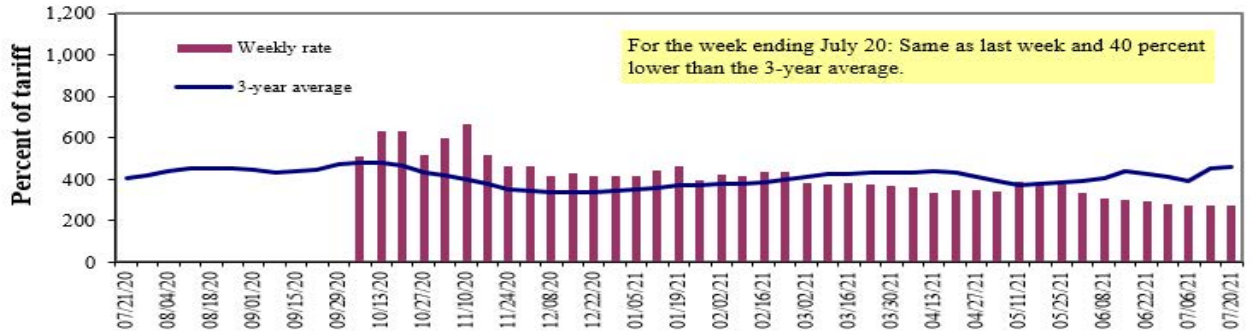
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

# Barge Transportation

Figure 8
**Illinois River barge freight rate[1,2,3]**




[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
[3]No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.
The 3-yr avg counts the avearge of MY2018 and MY2019. MY2020 data is not available. *Source: USDA, Agricultural Marketing Service.

Table 9
**Weekly barge freight rates: Southbound only**

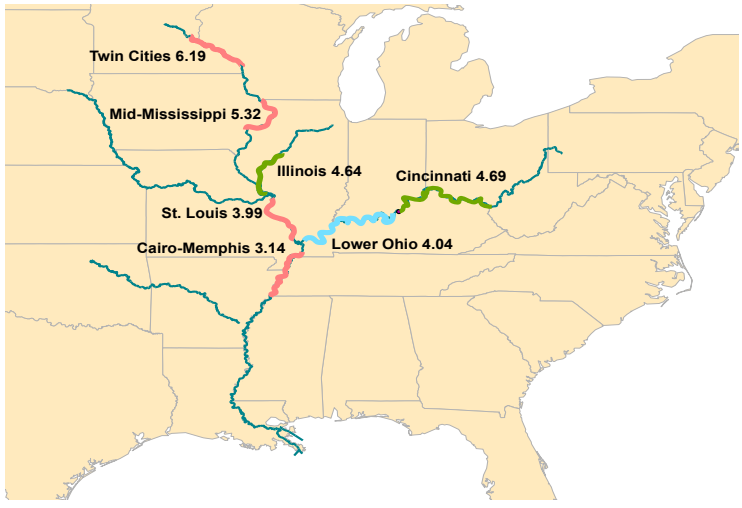
| | | Twin Cities | Mid-Mississippi | Lower Illinois River | St. Louis | Cincinnati | Lower Ohio | Cairo-Memphis |
|---|---|---|---|---|---|---|---|---|
| **Rate[1]** | 7/20/2021 | 356 | 281 | 276 | 203 | 204 | 204 | 188 |
| | 7/13/2021 | 354 | 278 | 275 | 200 | 209 | 209 | 188 |
| **$/ton** | 7/20/2021 | 22.04 | 14.95 | 12.81 | 8.10 | 9.57 | 8.24 | 5.90 |
| | 7/13/2021 | 21.91 | 14.79 | 12.76 | 7.98 | 9.80 | 8.44 | 5.90 |
| **Current week % change from the same week:** | | | | | | | | |
| | Last year | -16 | -18 | - | -5 | -6 | -6 | -6 |
| | 3-year avg. [2] | -20 | -31 | -40 | -29 | -26 | -27 | -25 |
| **Rate[1]** | August | 406 | 320 | 311 | 260 | 266 | 266 | 240 |
| | October | 581 | 545 | 540 | 438 | 540 | 540 | 419 |

[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.
ILL River 3-year avg. is the 4-week moving average of MY18 and MY19. Data for MY20 is unavialble. Source: USDA, Agricultural Marketing Service.

**Figure 9**
**Benchmark tariff rates**

**Calculating barge rate per ton:**
(Rate * 1976 tariff benchmark rate per ton)/100

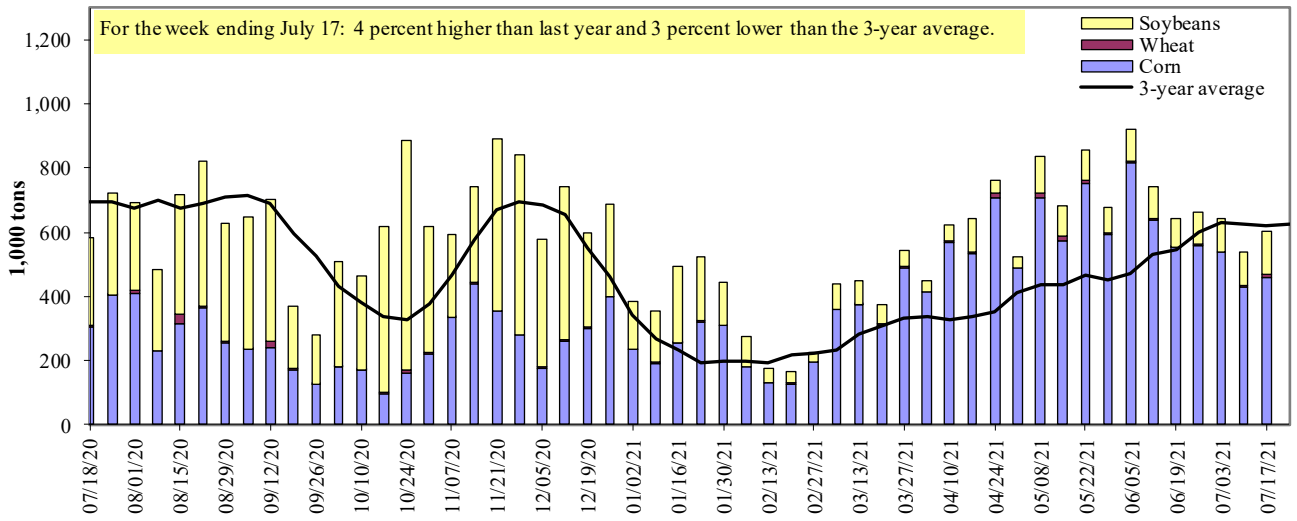
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.




*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 07/17/2021 | Corn | Wheat | Soybeans | Other | Total |
|---|---|---|---|---|---|
| **Mississippi River** | | | | | |
| Rock Island, IL (L15) | 251 | 6 | 56 | 3 | 317 |
| Winfield, MO (L25) | 359 | 8 | 89 | 3 | 459 |
| Alton, IL (L26) | 440 | 8 | 118 | 3 | 569 |
| Granite City, IL (L27) | 459 | 8 | 137 | 3 | 607 |
| **Illinois River (La Grange)** | 73 | 3 | 25 | 0 | 101 |
| **Ohio River (Olmsted)** | 63 | 18 | 25 | 2 | 108 |
| **Arkansas River (L1)** | 0 | 34 | 0 | 0 | 34 |
| | | | | | |
| Weekly total - 2021 | 522 | 60 | 162 | 5 | 749 |
| Weekly total - 2020 | 409 | 71 | 344 | 2 | 825 |
| 2021 YTD[1] | 17,072 | 834 | 4,811 | 198 | 22,915 |
| 2020 YTD[1] | 10,240 | 1,019 | 6,569 | 92 | 17,921 |
| 2021 as % of 2020 YTD | 167 | 82 | 73 | 215 | 128 |
| Last 4 weeks as % of 2020[2] | 140 | 77 | 44 | 53 | 96 |
| 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.

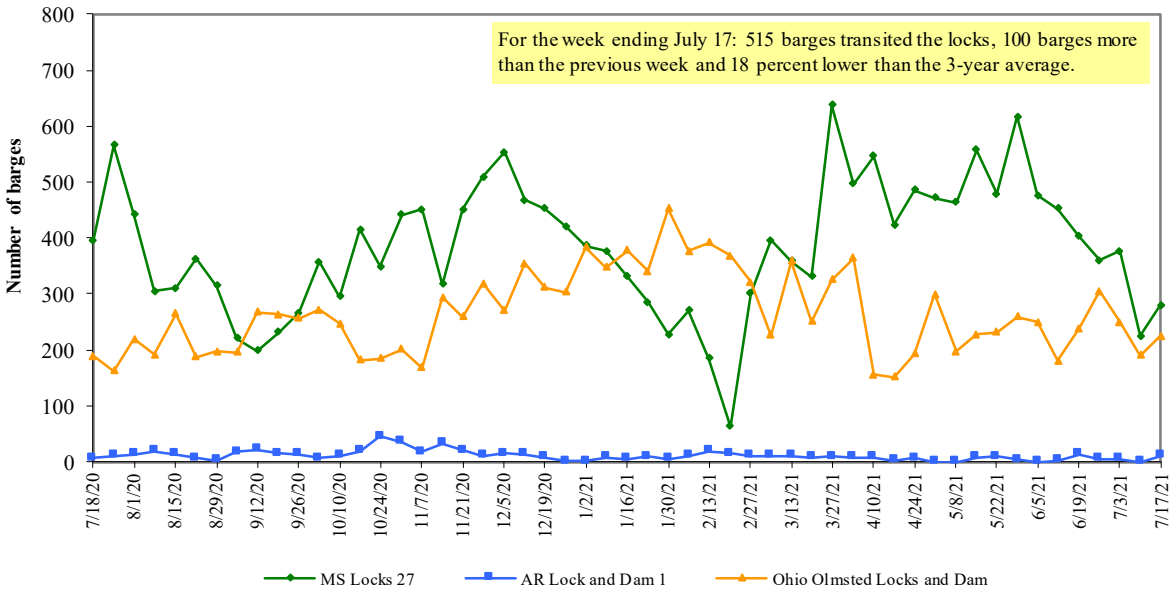
[2] As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

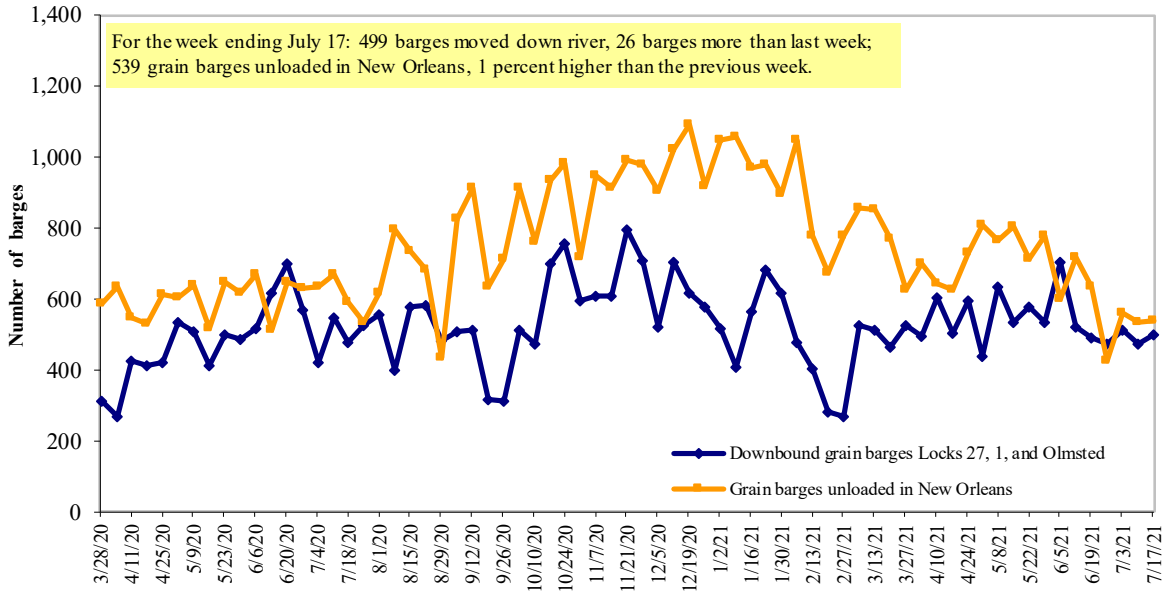
**Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**




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 7/19/2021 (U.S. $/gallon)**

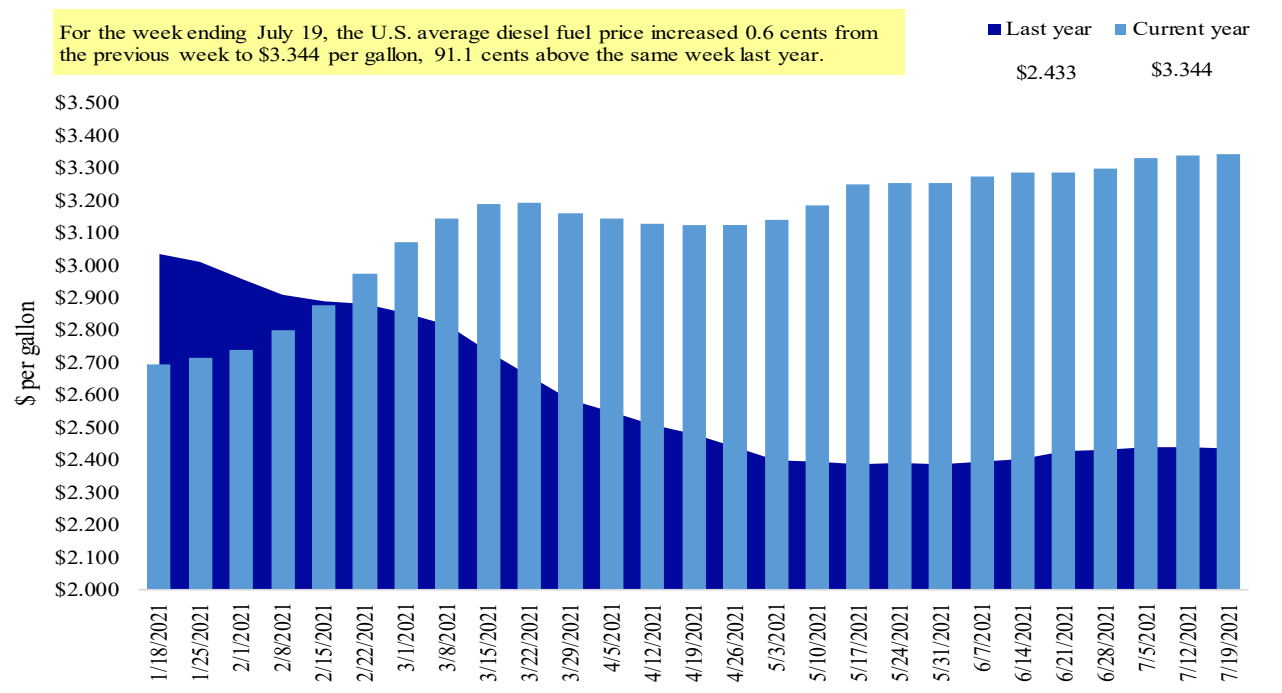
| Region | Location | Price | Change from Week ago | Change from Year ago |
|---|---|---|---|---|
| I | East Coast | 3.312 | 0.000 | 0.792 |
| | New England | 3.251 | 0.006 | 0.625 |
| | Central Atlantic | 3.478 | 0.001 | 0.779 |
| | Lower Atlantic | 3.211 | -0.002 | 0.834 |
| II | Midwest | 3.264 | 0.003 | 0.955 |
| III | Gulf Coast | 3.083 | 0.000 | 0.885 |
| IV | Rocky Mountain | 3.634 | 0.040 | 1.291 |
| V | West Coast | 3.929 | 0.024 | 0.975 |
| | West Coast less California | 3.598 | 0.030 | 1.001 |
| | California | 4.205 | 0.018 | 0.957 |
| Total | United States | 3.344 | 0.006 | 0.911 |

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

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

Figure 13

**Weekly diesel fuel prices, U.S. average**




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

# Grain Exports

Table 12

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

| | Wheat | | | | | | Corn | Soybeans | Total |
|---|---|---|---|---|---|---|---|---|---|
| For the week ending | HRW | SRW | HRS | SWW | DUR | All wheat | | | |
| **Export balances**[1] | | | | | | | | | |
| 7/8/2021 | 1,614 | 884 | 1,585 | 1,112 | 8 | 5,203 | 10,111 | 3,234 | 18,549 |
| This week year ago | 1,871 | 536 | 1,680 | 1,151 | 190 | 5,428 | 7,509 | 7,968 | 20,904 |
| **Cumulative exports-marketing year**[2] | | | | | | | | | |
| 2020/21 YTD | 739 | 231 | 577 | 324 | 42 | 1,913 | 59,748 | 58,692 | 120,352 |
| 2019/20 YTD | 1,312 | 208 | 772 | 399 | 137 | 2,827 | 35,981 | 38,120 | 76,928 |
| YTD 2020/21 as % of 2019/20 | 56 | 111 | 75 | 81 | 31 | 68 | 166 | 154 | 156 |
| Last 4 wks. as % of same period 2019/20* | 83 | 181 | 93 | 94 | 4 | 95 | 155 | 43 | 97 |
| Total 2019/20 | 9,526 | 2,318 | 6,960 | 4,751 | 922 | 24,477 | 42,622 | 43,994 | 111,094 |
| Total 2018/19 | 8,591 | 3,204 | 6,776 | 5,164 | 479 | 24,214 | 48,924 | 46,189 | 119,327 |

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

[2] Shipped export sales to date; 2021/22 marketing year now in effect for wheat while corn and soybeans remain in effect for the 2020/21 marketing year.

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 07/08/2021 | Total commitments[2] | | | % change | Exports[3] |
|---|---|---|---|---|---|
| | 2021/22 next MY | 2020/21 current MY | 2019/20 last MY | current MY from last MY | 3-yr. avg. 2017-19 |
| | | | - 1,000 mt - | | |
| Mexico | 2,044 | 15,095 | 14,294 | 6 | 14,869 |
| Japan | 864 | 10,859 | 9,648 | 13 | 11,221 |
| Columbia | 5 | 3,883 | 4,483 | (13) | 4,830 |
| Korea | 65 | 3,526 | 2,567 | 37 | 4,011 |
| China | 10,744 | 23,261 | 2,126 | 994 | 909 |
| **Top 5 importers** | **13,722** | **56,623** | **33,117** | **71** | **35,840** |
| **Total U.S. corn export sales** | **16,080** | **69,859** | **43,490** | **61** | **49,983** |
| % of projected exports | 25% | 96% | 96% | | |
| Change from prior week[2] | **133** | **139** | **981** | | |
| **Top 5 importers' share of U.S. corn export sales** | 85% | 81% | 76% | | 72% |
| **USDA forecast July 2021** | **63,613** | **72,519** | **45,216** | **60** | |
| **Corn use for ethanol USDA forecast, July 2021** | **132,080** | **128,270** | **123,368** | **4** | |

[1] Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.

[2] Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales.

[3] FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

**Top 5 importers[1] of U.S. soybeans**

| For the week ending 07/08/2021 | Total commitments[2] | | | % change | Exports[3] |
|---|---|---|---|---|---|
| | 2021/22 | 2020/21 | 2019/20 | current MY | 3-yr. avg. |
| | next MY | current MY | last MY | from last MY | 2017-19 |
| | | | 1,000 mt - | | - 1,000 mt - |
| China | 4,130 | 35,827 | 16,231 | 121 | 19,106 |
| Mexico | 812 | 4,785 | 4,731 | 1 | 4,591 |
| Egypt | 0 | 2,777 | 3,562 | (22) | 2,980 |
| Indonesia | 10 | 2,318 | 2,158 | 7 | 2,360 |
| Japan | 170 | 2,326 | 2,385 | (2) | 2,288 |
| **Top 5 importers** | **5,122** | **48,033** | **29,067** | **65** | **31,324** |
| **Total U.S. soybean export sales** | **9,689** | **61,926** | **46,087** | **34** | **49,352** |
| % of projected exports | 17% | 100% | 101% | | |
| change from prior week[2] | **291** | **22** | **313** | | |
| **Top 5 importers' share of U.S. soybean export sales** | 53% | 78% | 63% | | **63%** |
| **USDA forecast, July 2021** | **56,540** | **61,853** | **45,749** | **135** | |

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.

[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.

[3]FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 15

**Top 10 importers[1] of all U.S. wheat**

| For the week ending 07/08/2021 | Total Commitments[2] | | % change | Exports[3] |
|---|---|---|---|---|
| | 2021/22 | 2020/21 | current MY | 3-yr. avg. |
| | current MY | last MY | from last MY | 2018-20 |
| | | 1,000 mt - | | - 1,000 mt - |
| Mexico | 1,152 | 855 | 35 | 3,388 |
| Philippines | 1,081 | 1,185 | (9) | 3,121 |
| Japan | 812 | 805 | 1 | 2,567 |
| Korea | 451 | 549 | (18) | 1,501 |
| Nigeria | 516 | 396 | 30 | 1,490 |
| China | 348 | 885 | (61) | 1,268 |
| Taiwan | 239 | 359 | (34) | 1,187 |
| Indonesia | 2 | 269 | (99) | 1,131 |
| Thailand | 124 | 174 | (29) | 768 |
| Italy | 54 | 236 | (77) | 681 |
| **Top 10 importers** | **4,778** | **5,712** | (16) | **17,102** |
| **Total U.S. wheat export sales** | **7,116** | **8,255** | (14) | **24,617** |
| % of projected exports | 30% | 31% | | |
| change from prior week[2] | **425** | **764** | | |
| **Top 10 importers' share of U.S. wheat export sales** | 67% | 69% | | 69% |
| **USDA forecast, July 2021** | **23,842** | **27,030** | (12) | |

[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 07/15/21 | Previous week* | Current week as % of previous | 2021 YTD* | 2020 YTD* | 2021 YTD as % of 2020 YTD | Last 4-weeks as % of: | | 2020 total* |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | Last year | Prior 3-yr. avg. | |
| **Pacific Northwest** | | | | | | | | | |
| Wheat | 223 | 172 | 130 | 8,559 | 8,700 | 98 | 54 | 63 | 15,966 |
| Corn | 199 | 322 | 62 | 11,600 | 5,965 | 194 | 110 | 104 | 9,969 |
| Soybeans | 0 | 0 | n/a | 3,758 | 2,759 | 136 | 30 | 2 | 14,028 |
| **Total** | **422** | **494** | **85** | **23,917** | **17,424** | **137** | **82** | **73** | **39,963** |
| **Mississippi Gulf** | | | | | | | | | |
| Wheat | 129 | 114 | 114 | 1,550 | 2,123 | 73 | 132 | 131 | 3,422 |
| Corn | 564 | 528 | 107 | 27,039 | 16,788 | 161 | 94 | 108 | 28,781 |
| Soybeans | 69 | 157 | 44 | 10,573 | 11,698 | 90 | 25 | 24 | 38,013 |
| **Total** | **763** | **799** | **95** | **39,162** | **30,609** | **128** | **72** | **77** | **70,215** |
| **Texas Gulf** | | | | | | | | | |
| Wheat | 51 | 134 | 38 | 2,216 | 2,576 | 86 | 58 | 70 | 4,248 |
| Corn | 51 | 0 | n/a | 322 | 428 | 75 | 94 | 107 | 723 |
| Soybeans | 0 | 0 | n/a | 656 | 7 | n/a | n/a | n/a | 2,098 |
| **Total** | **102** | **135** | **76** | **3,193** | **3,011** | **106** | **61** | **73** | **7,068** |
| **Interior** | | | | | | | | | |
| Wheat | 87 | 30 | 293 | 1,557 | 1,242 | 125 | 203 | 175 | 2,263 |
| Corn | 170 | 134 | 127 | 5,222 | 4,682 | 112 | 86 | 95 | 8,683 |
| Soybeans | 78 | 44 | 179 | 3,355 | 3,471 | 97 | 73 | 58 | 7,274 |
| **Total** | **335** | **207** | **162** | **10,134** | **9,396** | **108** | **94** | **90** | **18,220** |
| **Great Lakes** | | | | | | | | | |
| Wheat | 25 | 0 | n/a | 253 | 342 | 74 | 58 | 53 | 891 |
| Corn | 0 | 0 | n/a | 39 | 0 | n/a | n/a | 20 | 111 |
| Soybeans | 0 | 8 | 0 | 34 | 61 | 56 | n/a | 11 | 1,111 |
| **Total** | **25** | **8** | **307** | **326** | **402** | **81** | **93** | **26** | **2,113** |
| **Atlantic** | | | | | | | | | |
| Wheat | 1 | 1 | n/a | 78 | 6 | n/a | 416 | 272 | 65 |
| Corn | 0 | 0 | n/a | 14 | 8 | 174 | n/a | 0 | 33 |
| Soybeans | 4 | 3 | 121 | 1,061 | 422 | 252 | 90 | 18 | 1,870 |
| **Total** | **5** | **4** | **123** | **1,153** | **436** | **265** | **98** | **19** | **1,968** |
| **U.S. total from ports*** | | | | | | | | | |
| Wheat | 516 | 450 | 115 | 14,213 | 14,988 | 95 | 75 | 83 | 26,854 |
| Corn | 983 | 985 | 100 | 44,236 | 27,871 | 159 | 97 | 104 | 48,301 |
| Soybeans | 152 | 212 | 72 | 19,437 | 18,417 | 106 | 36 | 27 | 64,394 |
| **Total** | **1,651** | **1,647** | **100** | **77,886** | **61,277** | **127** | **77** | **76** | **139,548** |

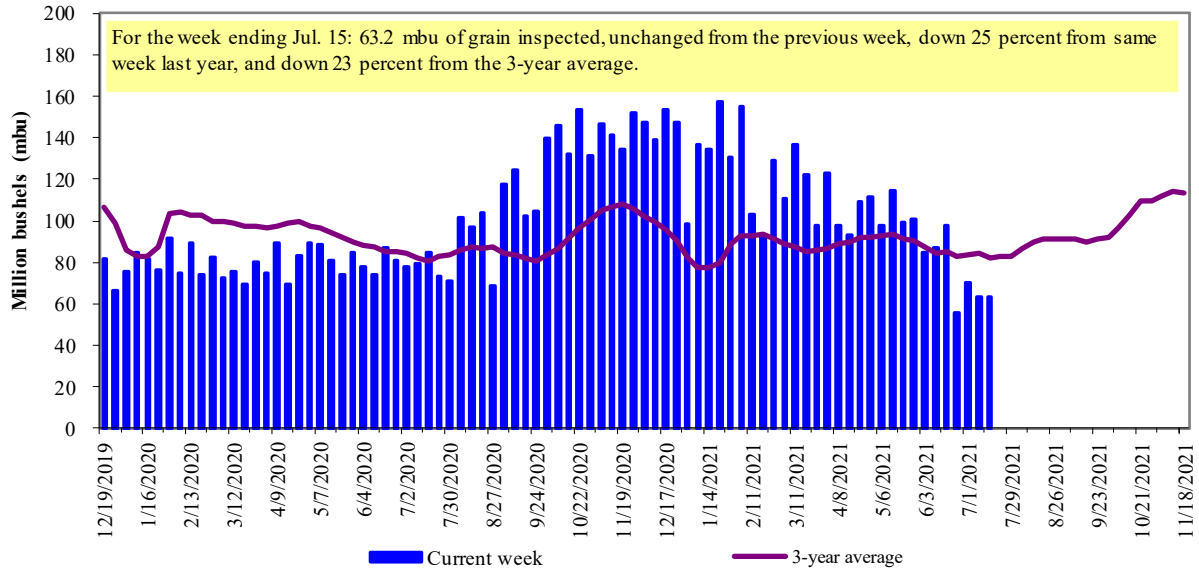
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

Figure 14

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

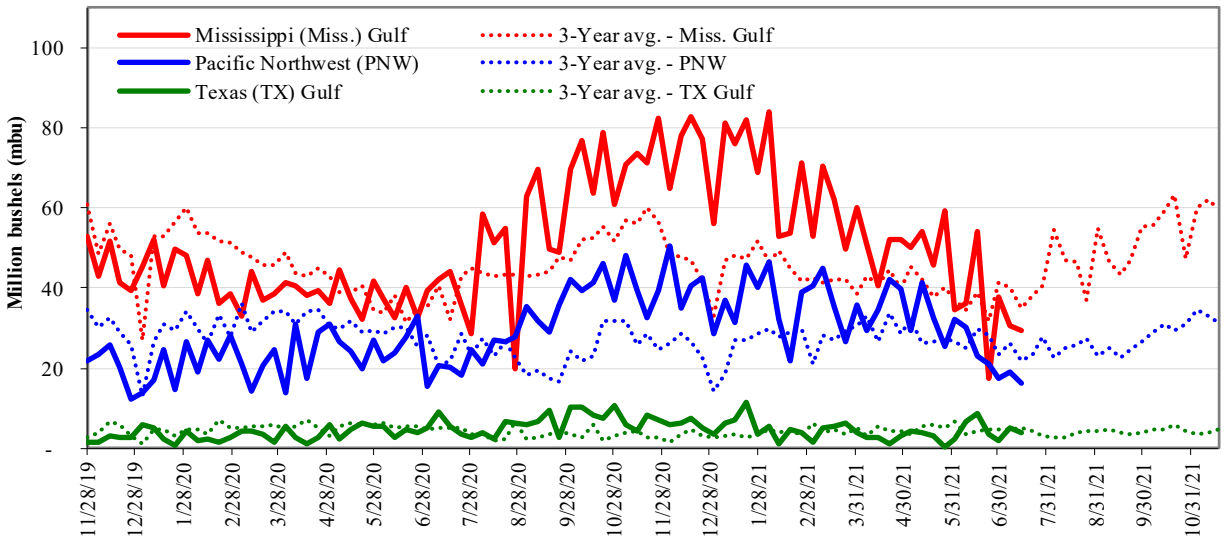



Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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




| Week ending 07/15/21 inspections (mbu): | |
|---|---|
| MS Gulf: | 29.5 |
| PNW: | 16.0 |
| TX Gulf: | 3.9 |

| Percent change from: | MS Gulf | TX Gulf | U.S. Gulf | PNW |
|---|---|---|---|---|
| Last wk: | down 4 | down 22 | down 6 | down 16 |
| Last Year (same wk): | down 33 | down 26 | down 33 | down 20 |
| 3-yr avg. (4-wk. mov. Avg): | down 20 | down 20 | down 20 | down 35 |

Source: USDA, Federal Grain Inspection Service.

# Ocean Transportation

Table 17

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

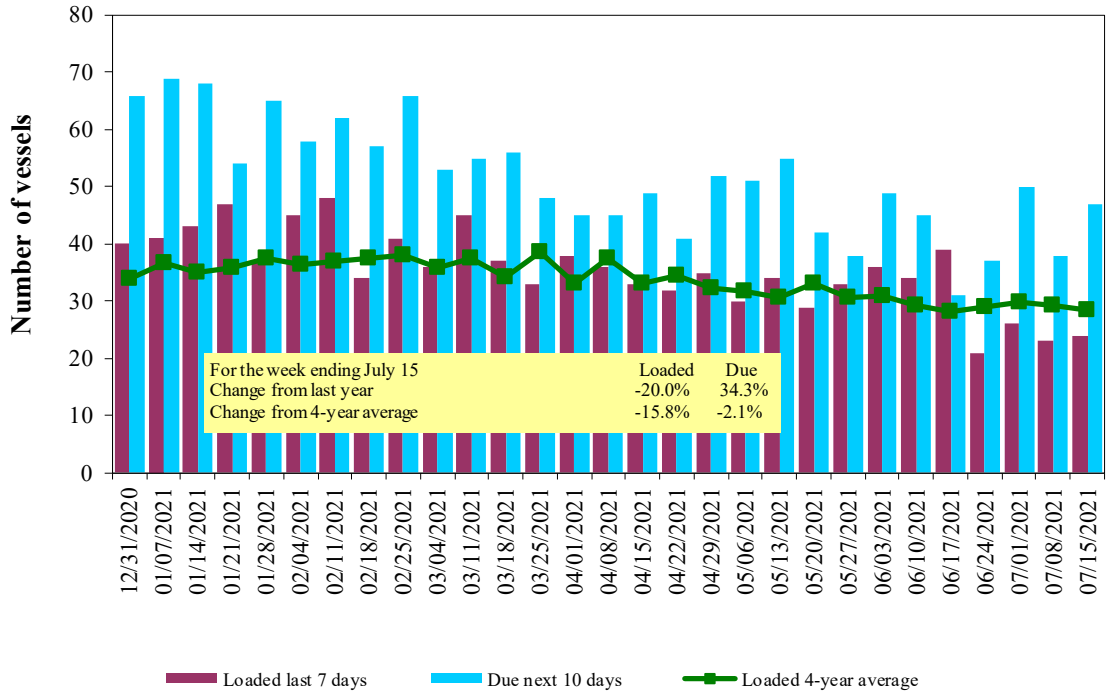
| | Gulf | | | Pacific Northwest |
|---|---|---|---|---|
| Date | In port | Loaded 7-days | Due next 10-days | In port |
| 7/15/2021 | 27 | 24 | 47 | 9 |
| 7/8/2021 | 20 | 23 | 38 | 5 |
| 2020 range | (22…60) | (23...46) | (34...68) | (7…24) |
| 2020 average | 37 | 33 | 49 | 15 |

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

Source: USDA, Agricultural Marketing Service.

Figure 16

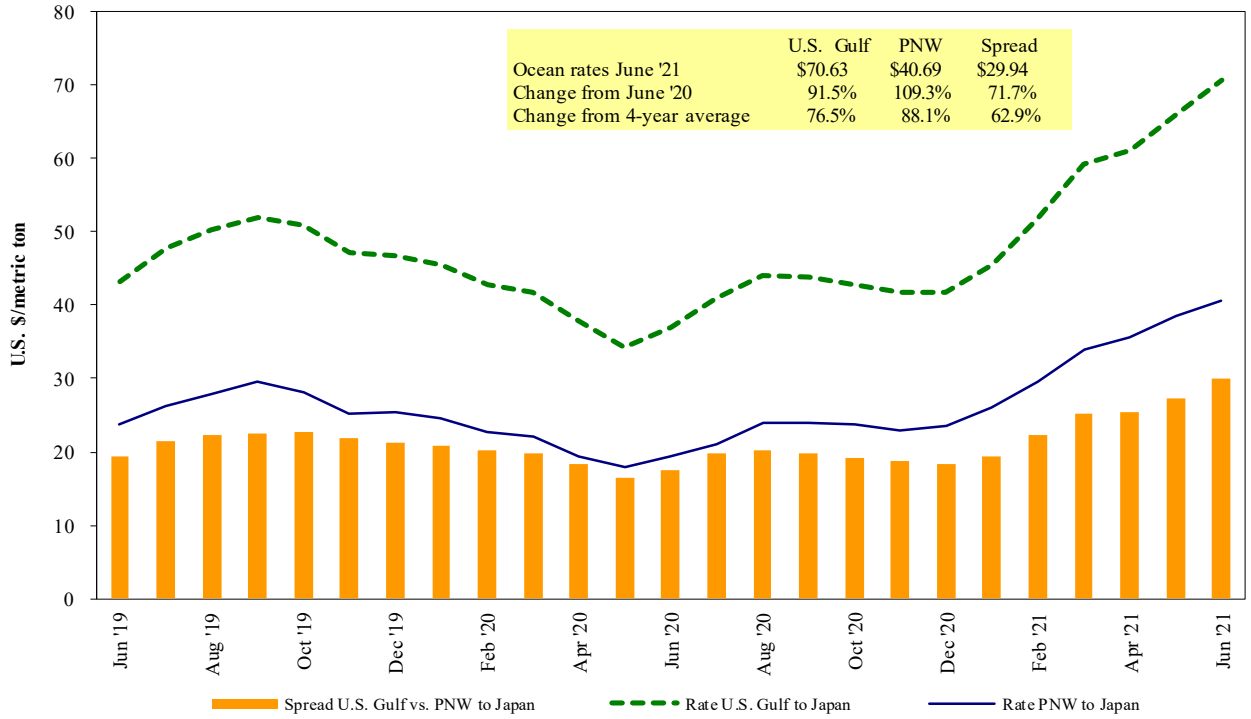
**U.S. Gulf[1] vessel loading activity**




[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source:USDA, Agricultural Marketing Service.

Figure 17

**Grain vessel rates, U.S. to Japan**




Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

**Ocean freight rates for selected shipments, week ending 07/17/2021**

| 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 | 48,000 | 70.10 |
| U.S. Gulf | Japan | Heavy grain | Aug 21/Sep 9 | 50,000 | 60.90 |
| U.S. Gulf | Japan | Heavy grain | Aug 1/10 | 50,000 | 69.75 |
| U.S. Gulf | Japan | Heavy grain | Jul 1/15 | 50,000 | 64.10 |
| U.S. Gulf | Japan | Grain | May 25/Jun 25 | 50,000 | 46.85 op 47.85 |
| U.S. Gulf | Japan | Heavy grain | Apr 15/May 15 | 50,000 | 47.00 |
| U.S. Gulf | Sudan | Wheat | May 20/30 | 48,000 | 112.75* |
| U.S. Gulf | Djibouti | Wheat | Jul 6/16 | 5,880 | 85.70* |
| PNW | Japan | Wheat | Jul 25/ Aug 5 | 32,590 | 64.00 |
| PNW | Japan | Wheat | Jul 16/31 | 30,250 | 64.35 |
| PNW | Japan | Wheat | Jun 5/15 | 50,600 | 49.30 |
| PNW | Yemen | Wheat | Jun 10/20 | 22,230 | 132.25* |
| PNW | Taiwan | Heavy grain | Aug 20/30 | 35,000 | 64.20* |
| PNW | Taiwan | Wheat | Aug 1/10 | 55,000 | 54.95 |
| PNW | Taiwan | Wheat | May 29/Jun 12 | 45,665 | 48.00 |

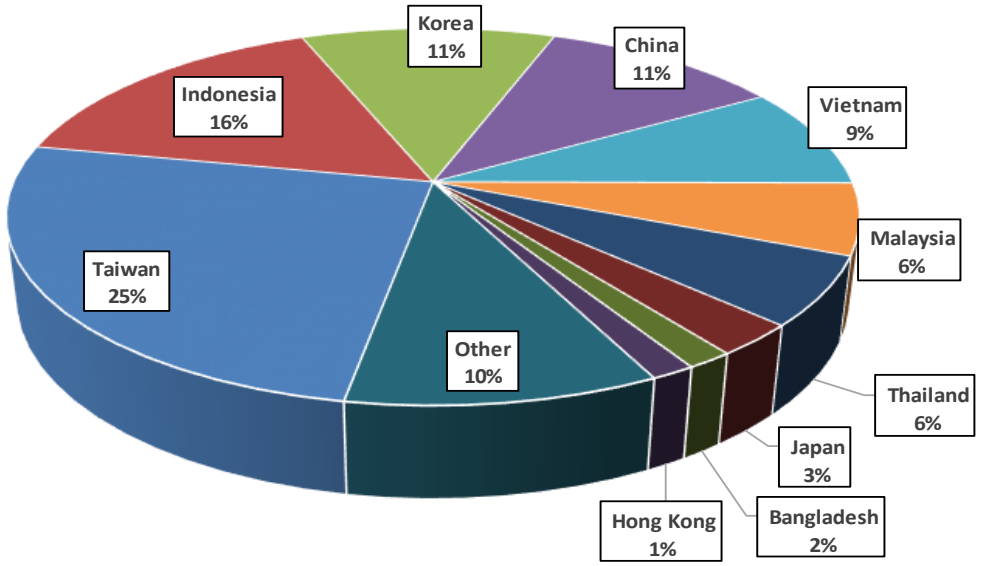
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

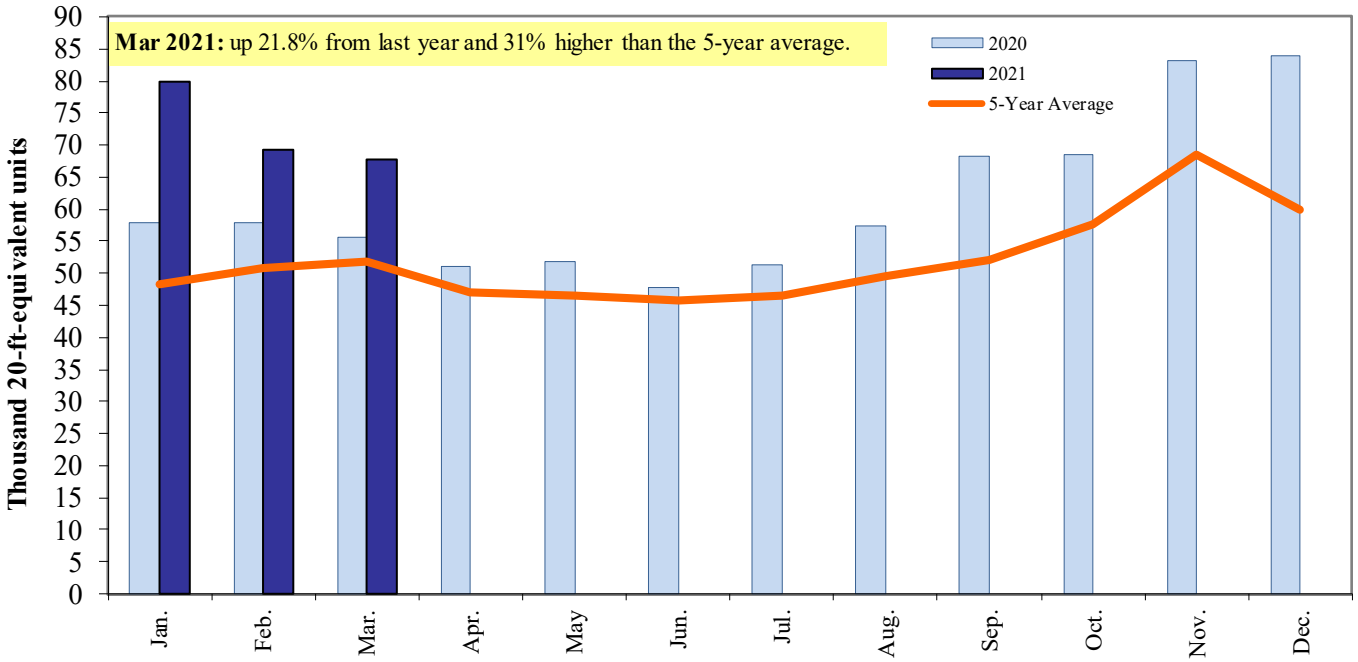
Figure 18
**Top 10 destination markets for U.S. containerized grain exports, Jan-Mar 2021**




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 |
| Bernadette Winston | bernadette.winston@usda.gov | (202) 690 - 0487 |
| 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**

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* July 22, 2021. Web: **http://dx.doi.org/10.9752/TS056.07-22-2021**