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 October 21, 2021

WEEKLY HIGHLIGHTS

President Announces Changes, Potential Relief of Supply-Chain Bottlenecks

On Wednesday, October 13, the President announced the Port of Los Angeles would begin operating around the clock, joining Long Beach, which already operates 24/7. The expanded hours are to help relieve growing backlogs in the busiest U.S. container port complex. Convening leaders of business, unions, and ports, the Administration's negotiation efforts have so far secured commitments from shippers and retailers to ensure extended port hours will be well utilized. According to a White House statement, Walmart will increase its container turnover 50 percent over several weeks by increasing its nighttime operations. United Parcel Service plans to increase its 24/7 operations, which will allow it to move 20 percent more containers off the ports. FedEx will work with its trucking and rail providers to double the number of containers it moves at night. Samsung said its warehousing operations will be open 24/7 for the next 90 days in a bid to move 60 percent more containers out of the ports. Containerized agricultural exporters rely heavily on the Los Angeles and Long Beach port complex to move products overseas. The ports' efforts will help regain terminal space by clearing import containers and allow more fluid operations for all users.

Grain Inspections Highest Since Mid May

For the week ending October 7, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 2.86 million metric tons (mmt). Total grain inspections were up 19 percent from the previous week, down 27 percent from last year, and up 11 percent from the 3-year average. Grain inspections were the highest since mid May, with soybean inspections jumping 87 percent from the previous week. From week to week, soybean shipments to China (1.17 mmt) rose over 200 percent, while wheat inspections fell 29 percent and corn inspections fell 14 percent. Also, from the previous week, total inspections increased 45 percent in the Pacific Northwest (PNW) and increased 1 percent in the Mississippi Gulf. The high increase in PNW inspections was reflected in a significant jump in PNW rail deliveries of grain to port (***GTR* table 3**). The high week-to-week increases were a marked departure from the general trend: over the last 4 weeks, total inspections were 38 percent below last year and 21 percent below the 3-year average.

Minnesota Provides HOS Relief To Transport Livestock Feed

Signed on October 4, the Governor of Minnesota's 30-day executive order (EO) 21-32—effective immediately—declares an emergency in Minnesota and waives hours-of-service (HOS) trucking regulations. The HOS waivers are intended to support Minnesota livestock producers in safely and efficiently transporting livestock, water supplies, and livestock-feed-related commodities. Extreme drought in Minnesota has made hay and other forage scarce. With EO 21-32, the Governor extends the HOS waivers originally issued in other EOs in July and August.

Snapshots by Sector

Export Sales

For the week ending September 30, **unshipped balances** of wheat, corn, and soybeans for marketing year 2021/22 totaled 51.1 million metric tons (mmt), down 17 percent from same time last year. Net **corn export sales** were 1.265 mmt, significantly higher than last week. Net **soybean export sales** were 1.042 mmt, down 5 percent from last week. Net weekly **wheat export sales** were 0.333 mmt, up 15 percent from last week.

Rail

U.S. Class I railroads originated 26,007 **grain carloads** during the week ending October 2. This was a 19-percent increase from the previous week, 2 percent less than last year, and 15 percent more than the 3-year average.

Average October shuttle **secondary railcar** bids/offers (per car) were $59 above tariff for the week ending October 7. This was $211 less than last week and $709 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending October 9, **barged grain movements** totaled 590,886 tons. This was 20 percent higher than the previous week and 27 percent lower than the same period last year.

For the week ending October 9, 360 grain barges **moved down river**—65 barges more than the previous week. There were 747 grain barges unloaded in the New Orleans region, 17 percent more than last week.

Ocean

For the week ending October 7, 32 **oceangoing grain vessels** were loaded in the Gulf—27 percent fewer than the same period last year. Within the next 10 days (starting October 8), 53 vessels were expected to be loaded—7 percent fewer than the same period last year.

As of October 7, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $84.25. This was unchanged from the previous week. The rate from PNW to Japan was $46.50 per mt, unchanged from the previous week.

Fuel

For the week ending October 11, the U.S. average **diesel fuel price** increased by 10.9 cents from the previous week to $3.586 per gallon, $1.19 above the same week last year. At $4.42 per gallon, California diesel prices are the highest since September 2012.

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Feature Article/Calendar

Third-Quarter 2021 Ocean Freight Rates Mark Highest Since 2008

In third quarter 2021, ocean freight rates for shipping bulk commodities, including grains, recorded their highest levels since second quarter 2008. The increase was due to strong demand for shipping bulk items, as well as tight vessel supply caused by congestion and other logistic inefficiencies.

Changes in Ocean Freight Rates by Destination and Route

Ocean freight rates for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan averaged $81.71 in third quarter 2021—24 percent more than second quarter 2021 (quarter to quarter), 90 percent more than the same period last year (year to year), and 84 percent more than the 4-year average. The third-quarter 2021 rate to ship grain from the Pacific Northwest (PNW) to Japan was $44.56 per mt, up 16 percent quarter to quarter, up 93 percent year to year, and 84 percent more than the 4-year average. The cost of shipping grain from the U.S. Gulf to Europe averaged $28.21 per mt—up 22 percent quarter to quarter, up 45 percent year to year, and up 49 percent from the 4-year average. The spread—i.e., the difference between the U.S. Gulf and PNW-to-Japan rates—stayed above quarter-to-quarter and year-to-year levels and above the 4-year average (table and figure below).

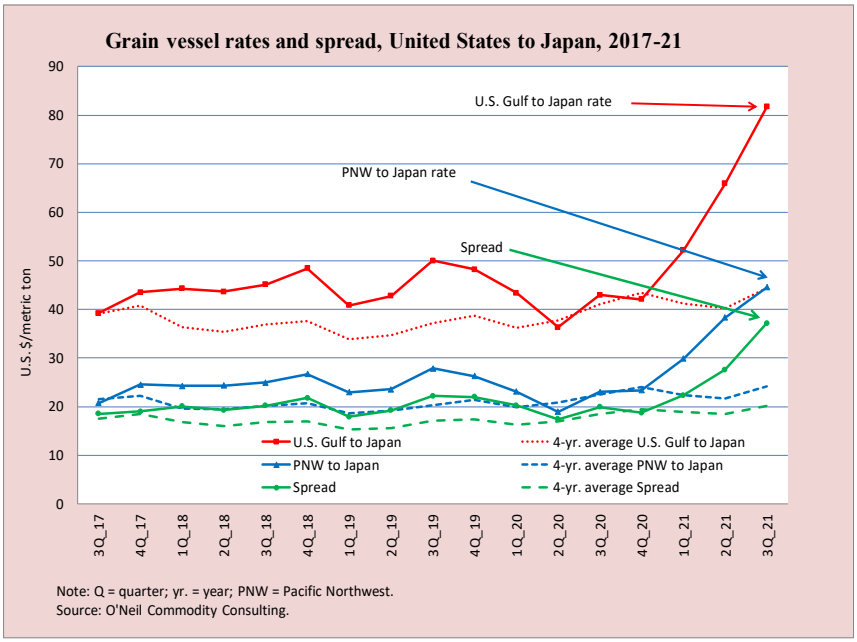
Ocean freight rates for grain routes during third quarter 2021

Route	Jul.	Aug.	Sep.	3rd quarter 2021	Change from 2nd qtr. '21	Change from 3rd qtr. '20	Change from 4-yr. avg.
	--$/mt--			--$/mt--	Percent		
U.S. Gulf to Japan	82.60	80.38	82.15	81.71	24	90	84
PNW to Japan	44.85	43.63	45.20	44.56	16	93	84
Spread	37.75	36.75	36.95	37.15	35	86	84
U.S. Gulf to Europe	23.90	29.38	31.35	28.21	22	45	49

Note: qtr. = quarter; avg. = average; mt = metric ton; yr. = year; PNW = Pacific Northwest.
Source: O'Neil Commodity Consulting.

Factors Driving Up Rates

Rate increases that began in January continued through July, as global trade received a boost from the reopening of major economies around the world. U.S. Gulf- and PNW-to-Japan rates fell slightly in August, but rose again in September. Rates from the U.S. Gulf to Europe increased through August and September. All of the rate increases were driven by port congestion and other factors, as outlined here.



Strong iron ore demand in China and EU. When Chinese manufacturing and construction resumed their expansion in July and August, China's low iron ore inventories drove the country to import large amounts of iron ore—88.5 million tons in July and 97.5 million tons in August (Maritime Logistics Professional

Bloomberg News). At the same time, in the European Union (EU), mass vaccination and reopening economies fueled industrial production (including iron) and boosted iron trade.

Increased coal demand in China and EU. In the EU, rebounding industrial activity spurred a high demand for energy, as well as a shortage of liquified natural gas in July. The gas shortage prompted utility companies to use more coal for power generation, driving up coal imports and the demand for bulk vessels. China's demand for coal demand was also strong in September, triggered by the country's high demand for electricity and low availability of hydroelectricity.

Start of grain market season in EU and Russia. In July, the start of the grain market season in the EU and Russia boosted the demand for Panamax and Supramax vessels. Also generating more demand for Panamax and Supramax vessels, the continued increase in grain exports from Australia to the Middle East (instead of China) led to a rise in average haulage length (ton-miles) (Drewry Maritime Research (Drewry)).

Congestion at ports in China and elsewhere. Although ocean freight rates from the U.S. Gulf and PNW to Japan fell in August, they stayed higher than those recorded from January to June. The rates from the U.S. Gulf to Europe increased in August. The high rates were supported by rising congestion at Chinese ports and elsewhere. According to Drewry, over 50 million deadweight tons (dwt) capacity of dry bulk vessels waited to berth at Chinese ports in August, as the resurgence of COVID-19 exacerbated China's port congestion: several ports renewed restrictions on discharging cargo, which squeezed the vessel supply. In addition, as container-cargo volumes mounted, some container cargoes were diverted to dry bulk vessels, creating more demand for dry bulk vessels. August rates were further supported by congestion at the Australian ports of Newcastle and Hedland. Plus, at Brazilian ports, Capesize vessels of more than 10 million dwt encountered days-long congestion delays.

Current Market Analysis and Outlook

At $82.15 per mt, the monthly ocean freight rates rose again in September to their highest level since September 19, 2008. The rates continued to trend upward thereafter. For the week ending October 7, 2021, the ocean freight rate from the U.S. Gulf to Japan was $84.25 per mt of grain, 95 percent higher than the first available rate in the beginning of the year, and 95 percent higher than the same period a year ago. The rate from PNW to Japan was $46.50 per mt, 89 percent higher than the beginning of the year, and 96 percent higher than a year ago. One rate-raising factor from the third quarter—congestion at Chinese Ports—has continued as the political and economic tussle between Australia and China lingers. According to O'Neil Commodity Consulting (as of October 7), about 34 percent of Capesize fleet is currently anchored at Chinese ports, down from 38 percent earlier.

Possible additional upward pressures. According to Drewry, because of construction in the Black Sea and Turkish Straits, congestion in those regions' ports is expected to worsen in the months ahead. Periodic transit closures could increase the wait time for vessels, leading to reduced vessel supply and further boosting ocean freight rates. In addition, the pace of new vessel deliveries has slowed, with 3.5 million dwt new dry bulk vessels delivered in July, 2.2 million dwt in August, and 1.7 million dwt in September (Drewry). These slowed deliveries may squeeze vessel supply and put upward pressure on ocean freight rates. Peak season for steel production—typically, September and October—may bolster iron ore prices and EU and Chinese imports, leading to high vessel demand and rates.

Possible downward pressures. On the other hand, suspension of coal exports of more than 30 mining companies by the Indonesian Government could dampen the country's exports of non-coking coal (Drewry). The ongoing political turmoil in Guinea could affect port and mining activities, hampering the country's exports of bauxites. China may decrease its fertilizer exports to tackle the soaring prices of fertilizers domestically. In combination, these factors could reduce demand for bulk vessels and put downward pressure on ocean freight rates.

Uncertain effects of recovery from Ida. Meanwhile, grain-loading activity in the U.S. Gulf is recovering from the effects of Hurricane Ida. The number of vessels loaded per week and expected within the next 10 days has risen significantly in the weeks since the hurricane (see ***GTR* fig. 16**). It is not yet known how increased grain-loading activity in the U.S. Gulf will affect ocean freight rates. An increase in loaded vessels may relieve congestion by freeing up capacity and increasing vessel supply, which in turn, may lower rates. On the flip side, sustained high vessel-loading activity could signify increased demand for vessels, putting upward pressure on rates.

Given the multiple factors putting opposing pressures on rates, the sustainability of the current high ocean freight rates is uncertain. *surajudeen.olowolayemo@usda.gov*

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
10/13/21	241	297	235	275	377	330
10/06/21	233	297	241	384	377	330

[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)

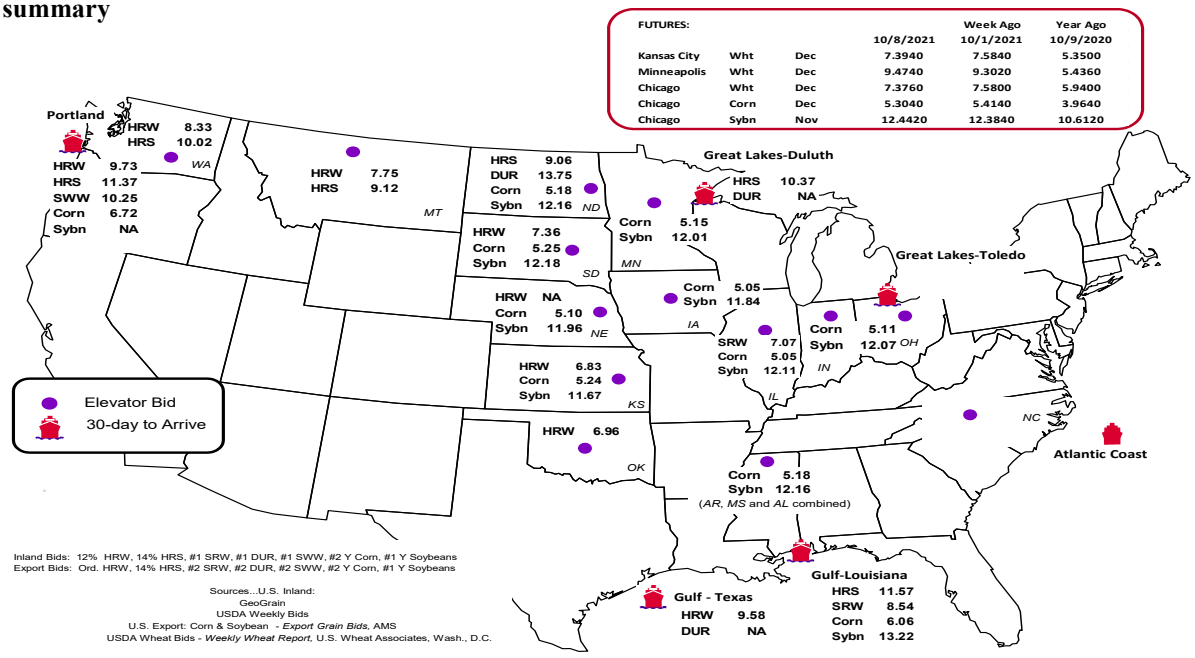
Commodity	Origin–destination	10/8/2021	10/1/2021
Corn	IL–Gulf	-1.01	-1.12
Corn	NE–Gulf	-0.96	-1.04
Soybean	IA–Gulf	-1.38	-1.37
HRW	KS–Gulf	-2.75	-3.02
HRS	ND–Portland	-2.31	-2.30

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]
10/06/2021[p]	514	1,166	7,963	556	10,199	10/02/21	2,786
9/29/2021[r]	206	2,003	4,024	410	6,643	9/25/2021	2,949
2021 YTD[r]	37,815	50,611	210,449	11,599	310,474	2021 YTD	111,570
2020 YTD[r]	22,154	37,805	192,453	10,139	262,551	2020 YTD	98,364
2021 YTD as % of 2020 YTD	171	134	109	114	118	% change YTD	113
Last 4 weeks as % of 2020[2]	17	69	71	52	62	Last 4wks. % 2020	119
Last 4 weeks as % of 4-year avg.[2]	30	92	100	78	89	Last 4wks. % 4 yr.	101
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.

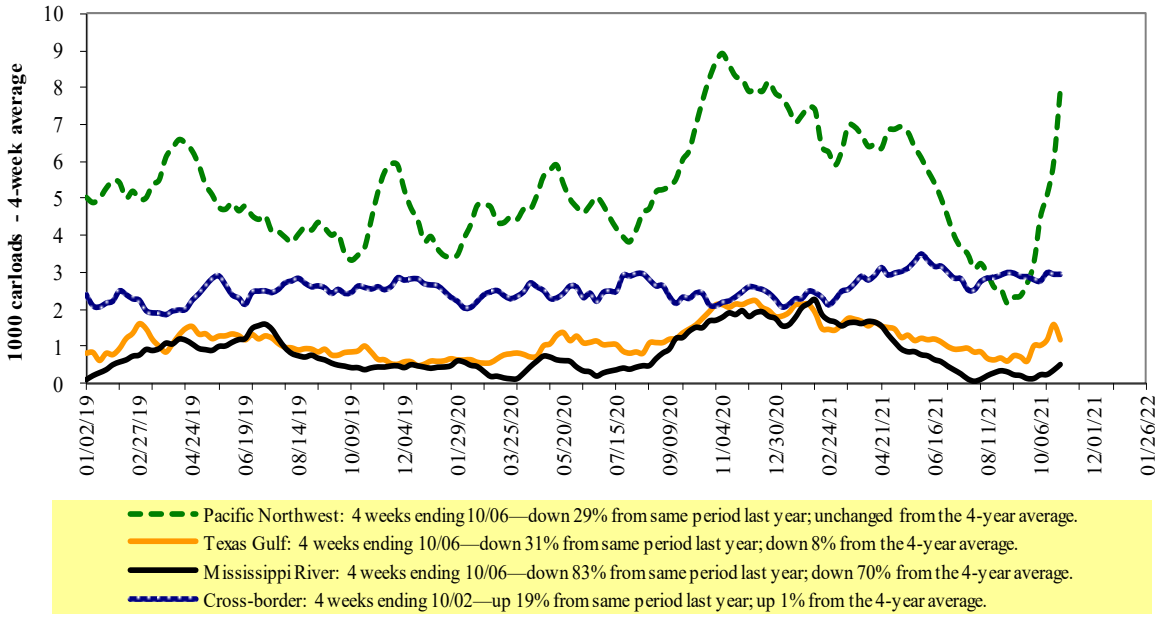
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
10/2/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,773	2,327	13,807	2,004	6,096	26,007	4,211	5,242
This week last year	1,882	2,409	14,673	1,364	6,213	26,541	5,168	5,002
2021 YTD	68,484	93,012	447,718	46,222	237,393	892,829	158,632	185,064
2020 YTD	65,187	93,270	438,749	42,527	208,145	847,878	165,131	184,957
2021 YTD as % of 2020 YTD	105	100	102	109	114	105	96	100
Last 4 weeks as % of 2020*	87	83	83	124	95	88	83	81
Last 4 weeks as % of 3-yr. avg.**	83	75	96	139	107	98	88	86
Total 2020	91,659	129,727	613,630	57,782	296,701	1,189,499	238,132	261,778

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

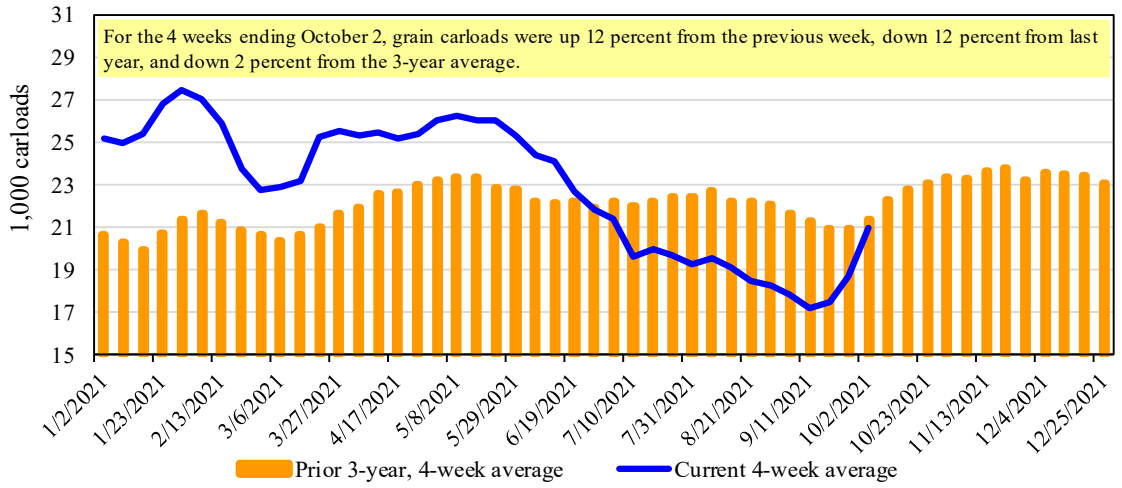
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
10/7/2021		Oct-21	Oct-20	Nov-21	Nov-20	Dec-21	Dec-20	Jan-22	Jan-21
BNSF[3]	COT grain units	No offer	no offer	0	92	no bids	0	no bids	no bid
	COT grain single-car	No offer	no offer	0	8	0	26	no bids	0
UP[4]	GCAS/Region 1	n/a	no offer	n/a	no offer	n/a	no offer	n/a	n/a
	GCAS/Region 2	n/a	no offer	n/a	no offer	n/a	no offer	n/a	n/a

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction. n/a = not available.

[3]BNSF - COT = BNSF Railway Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

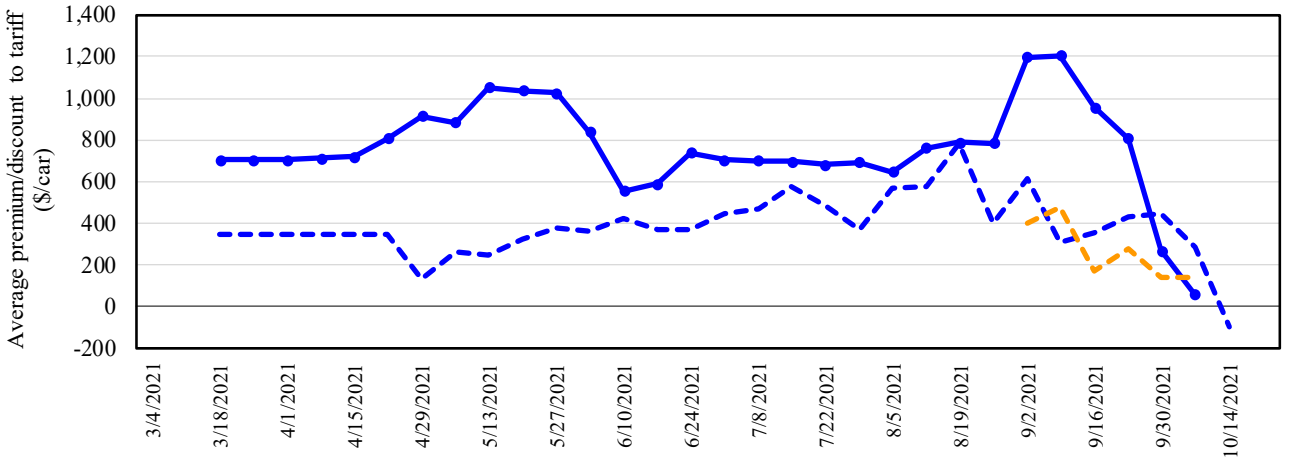
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: USDA, Agricultural Marketing Service.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/ supply.

Figure 4
Bids/offers for railcars to be delivered in October 2021, secondary market

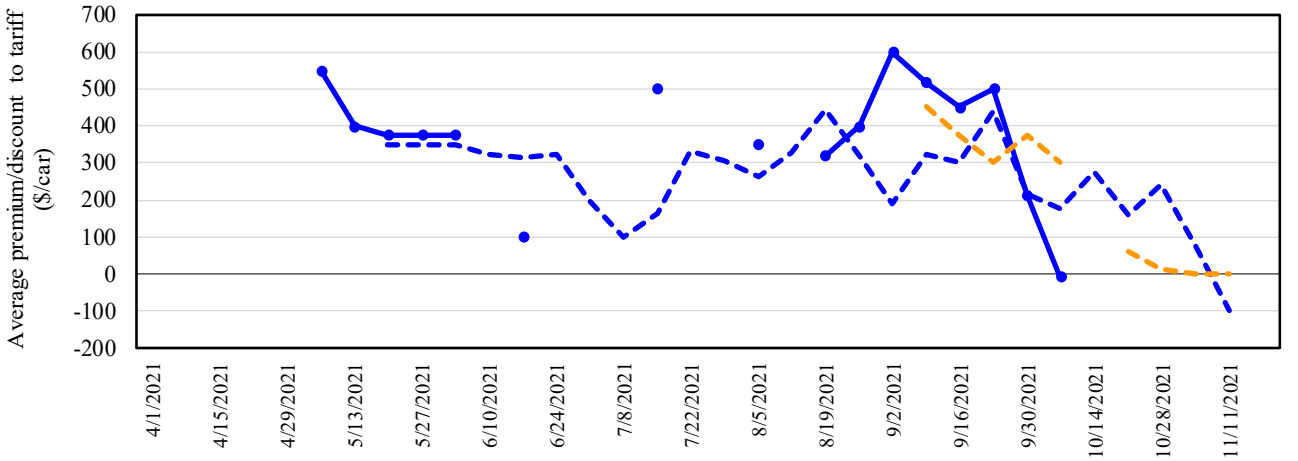


10/7/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$48	$167

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $211 this week and are $1,147 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 November 2021, secondary market



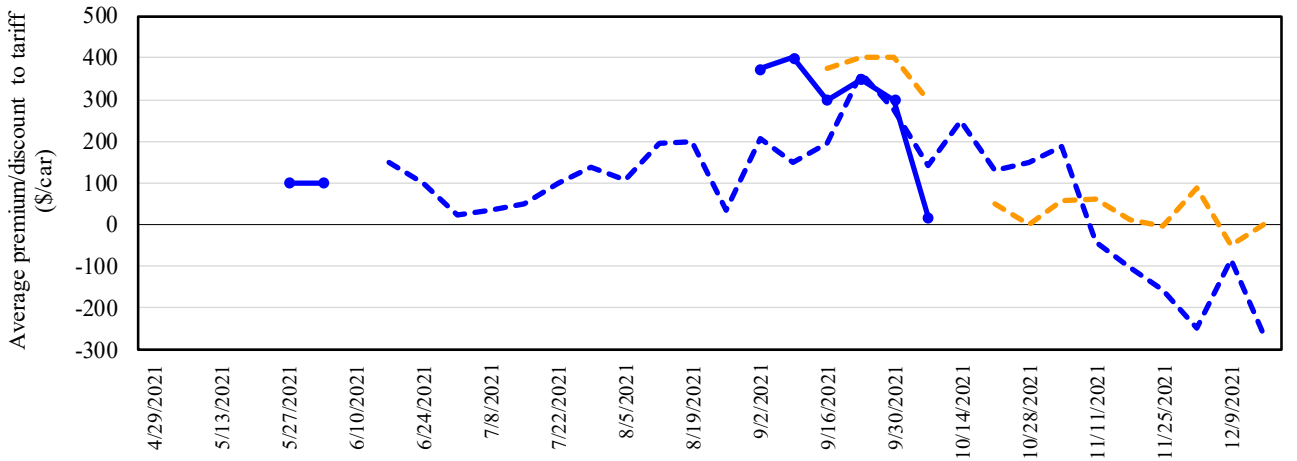
10/7/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$67	$50

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $221 this week and are $608 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 December 2021, secondary market



10/7/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$63	$100

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $281 this week and are $381 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: 10/7/2021	Delivery period					
		Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-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**	**(48)**	**(67)**	**(63)**	**n/a**	**n/a**	**n/a**
	Change from last week	(226)	(167)	n/a	n/a	n/a	n/a
	Change from same week 2020	(1023)	(667)	(563)	n/a	n/a	n/a
	UP-Pool	**167**	**50**	**100**	**n/a**	**n/a**	**n/a**
	Change from last week	(196)	(275)	(200)	n/a	n/a	n/a
	Change from same week 2020	(396)	(300)	(163)	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]

October 2021	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,695	$132	$38.00	$1.03	3
	Grand Forks, ND	Duluth-Superior, MN	$3,658	$0	$36.33	$0.99	-13
	Wichita, KS	Los Angeles, CA	$7,290	$0	$72.39	$1.97	2
	Wichita, KS	New Orleans, LA	$4,525	$231	$47.23	$1.29	4
	Sioux Falls, SD	Galveston-Houston, TX	$7,026	$0	$69.77	$1.90	3
	Colby, KS	Galveston-Houston, TX	$4,801	$254	$50.19	$1.37	4
	Amarillo, TX	Los Angeles, CA	$5,121	$353	$54.36	$1.48	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$262	$42.32	$1.07	7
	Toledo, OH	Raleigh, NC	$8,130	$0	$80.73	$2.05	4
	Des Moines, IA	Davenport, IA	$2,505	$55	$25.43	$0.65	4
	Indianapolis, IN	Atlanta, GA	$6,227	$0	$61.84	$1.57	4
	Indianapolis, IN	Knoxville, TN	$5,247	$0	$52.11	$1.32	4
	Des Moines, IA	Little Rock, AR	$4,000	$163	$41.34	$1.05	6
	Des Moines, IA	Los Angeles, CA	$5,880	$474	$63.10	$1.60	8
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$280	$38.84	$1.06	7
	Toledo, OH	Huntsville, AL	$6,714	$0	$66.67	$1.81	2
	Indianapolis, IN	Raleigh, NC	$7,422	$0	$73.70	$2.01	4
	Indianapolis, IN	Huntsville, AL	$5,367	$0	$53.30	$1.45	2
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$262	$49.72	$1.35	6
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,193	$0	$41.64	$1.13	4
	Wichita, KS	Galveston-Houston, TX	$4,411	$0	$43.80	$1.19	4
	Chicago, IL	Albany, NY	$6,670	$0	$66.24	$1.80	5
	Grand Forks, ND	Portland, OR	$5,851	$0	$58.10	$1.58	3
	Grand Forks, ND	Galveston-Houston, TX	$5,721	$0	$56.81	$1.55	-5
	Colby, KS	Portland, OR	$6,012	$416	$63.83	$1.74	5
Corn	Minneapolis, MN	Portland, OR	$5,380	$0	$53.43	$1.36	4
	Sioux Falls, SD	Tacoma, WA	$5,340	$0	$53.03	$1.35	4
	Champaign-Urbana, IL	New Orleans, LA	$3,920	$262	$41.52	$1.05	7
	Lincoln, NE	Galveston-Houston, TX	$4,080	$0	$40.52	$1.03	5
	Des Moines, IA	Amarillo, TX	$4,420	$205	$45.92	$1.17	6
	Minneapolis, MN	Tacoma, WA	$5,380	$0	$53.43	$1.36	4
	Council Bluffs, IA	Stockton, CA	$5,300	$0	$52.63	$1.34	4
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,050	$0	$60.08	$1.64	3
	Minneapolis, MN	Portland, OR	$6,100	$0	$60.58	$1.65	3
	Fargo, ND	Tacoma, WA	$5,950	$0	$59.09	$1.61	3
	Council Bluffs, IA	New Orleans, LA	$4,975	$302	$52.40	$1.43	6
	Toledo, OH	Huntsville, AL	$4,954	$0	$49.20	$1.34	0
	Grand Island, NE	Portland, OR	$5,360	$426	$57.45	$1.56	8

[1]A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

[2]Approximate load per car = 111 short tons (100.7 metric tons): corn 56 pounds per bushel (lbs/bu), wheat and soybeans 60 lbs/bu.

[3]Regional economic areas are defined by the Bureau of Economic Analysis (BEA).

[4]Percentage change year over year (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8

Tariff rail rates for U.S. bulk grain shipments to Mexico

Date: October 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	$7,699	$0	$78.67	$2.14	4
	OK	Cuautitlan, EM	$6,900	$181	$72.35	$1.97	5
	KS	Guadalajara, JA	$7,619	$687	$84.86	$2.31	5
	TX	Salinas Victoria, NL	$4,420	$110	$46.29	$1.26	4
Corn	IA	Guadalajara, JA	$9,102	$613	$99.27	$2.52	5
	SD	Celaya, GJ	$8,300	$0	$84.81	$2.15	2
	NE	Queretaro, QA	$8,322	$377	$88.88	$2.26	4
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,687	$367	$82.29	$2.09	4
	SD	Torreon, CU	$7,825	$0	$79.95	$2.03	2
Soybeans	MO	Bojay (Tula), HG	$8,647	$570	$94.17	$2.56	4
	NE	Guadalajara, JA	$9,207	$594	$100.14	$2.72	3
	IA	El Castillo, JA	$9,510	$0	$97.17	$2.64	1
	KS	Torreon, CU	$8,109	$420	$87.15	$2.37	4
Sorghum	NE	Celaya, GJ	$7,932	$546	$86.63	$2.20	5
	KS	Queretaro, QA	$8,108	$226	$85.15	$2.16	2
	NE	Salinas Victoria, NL	$6,713	$182	$70.44	$1.79	2
	NE	Torreon, CU	$7,157	$390	$77.11	$1.96	4

[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.

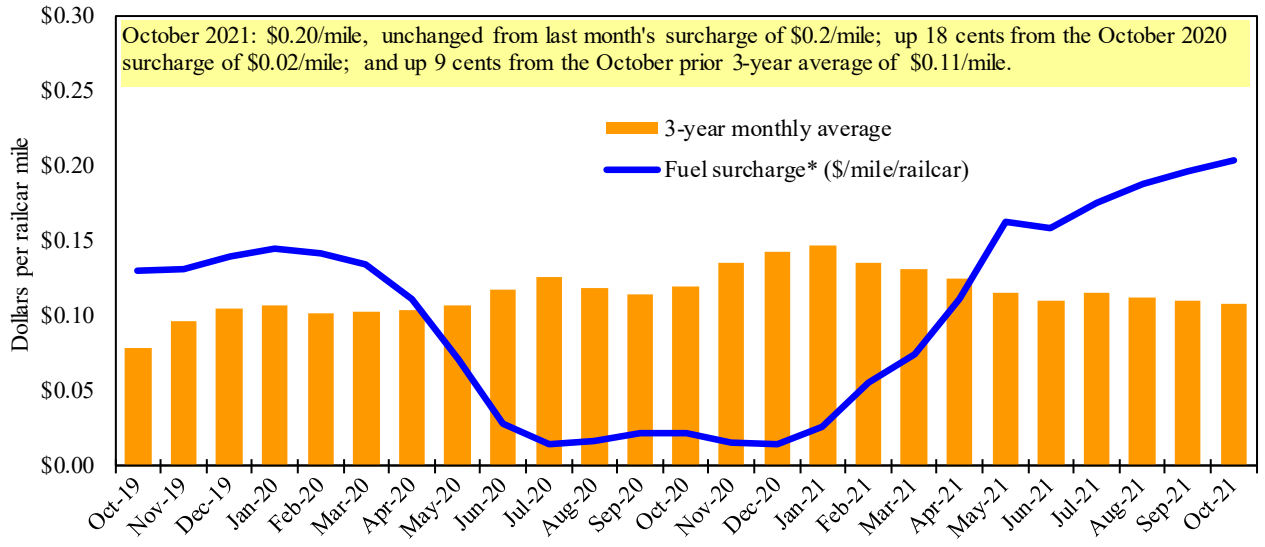
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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.

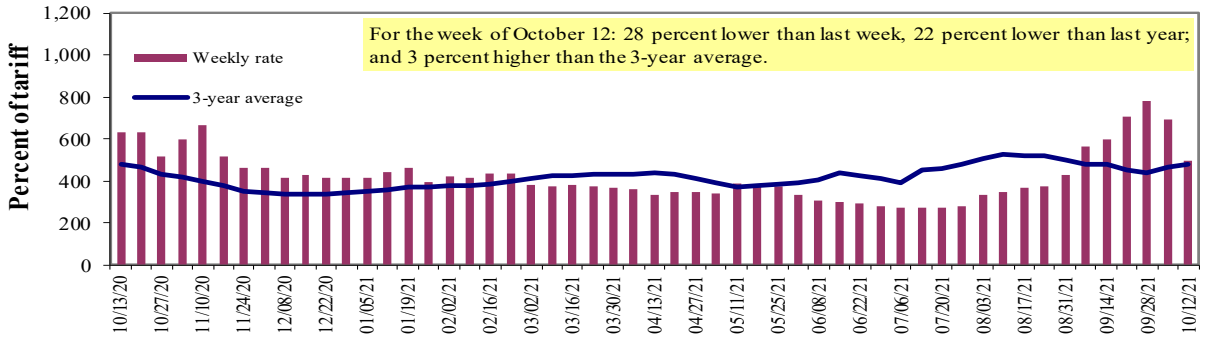
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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

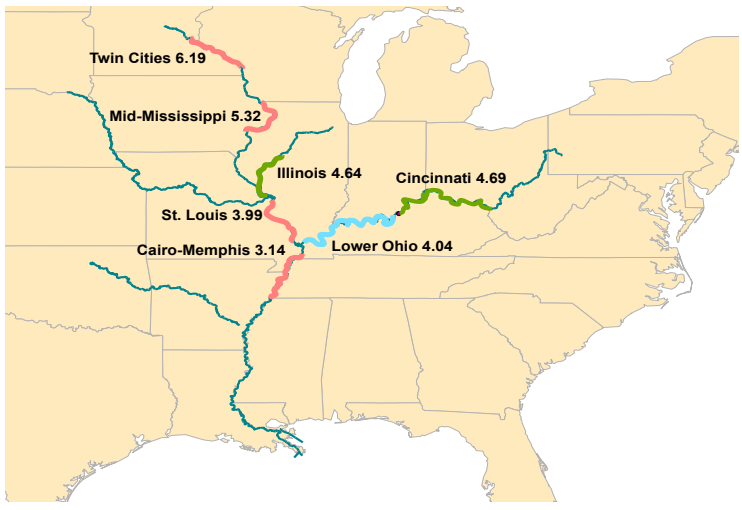
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	10/12/2021	494	519	495	549	573	573	532
	10/5/2021	629	717	692	713	708	708	763
$/ton	10/12/2021	30.58	27.61	22.97	21.91	26.87	23.15	16.70
	10/5/2021	38.94	38.14	32.11	28.45	33.21	28.60	23.96
Current week % change from the same week:								
	Last year	-25	-22	-22	2	11	11	8
	3-year avg. [2]	4	9	13	36	29	29	37
Rate[1]	November	476	482	462	380	435	435	350
	January	-	-	436	319	354	354	305

[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

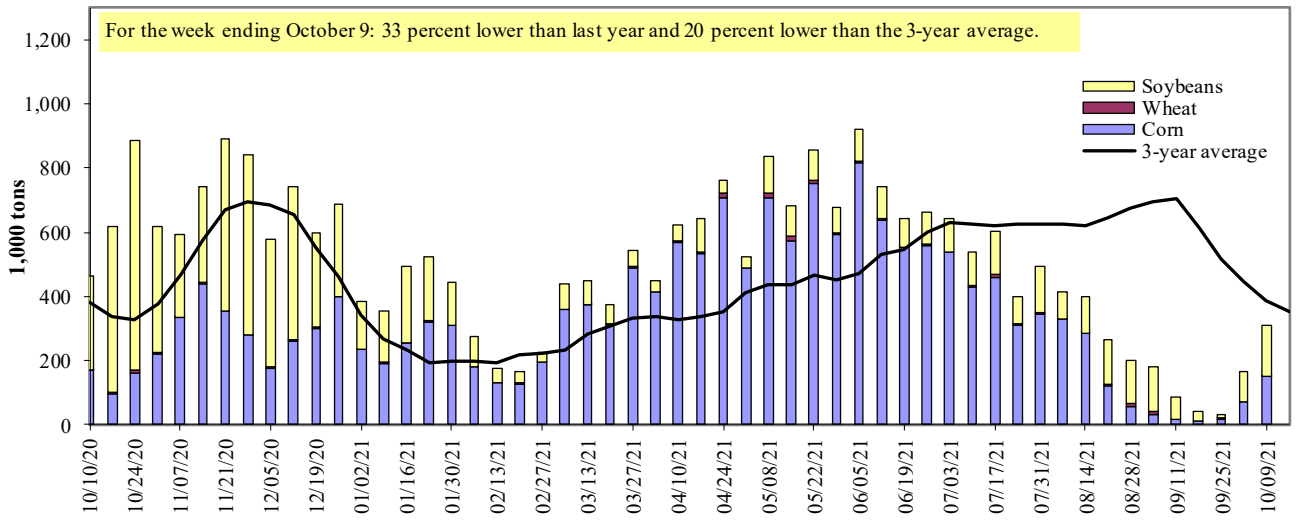
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 10/09/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	6	0	160	0	167
Winfield, MO (L25)	110	2	202	0	314
Alton, IL (L26)	166	2	204	0	372
Granite City, IL (L27)	149	2	158	0	309
Illinois River (La Grange)	32	0	8	0	40
Ohio River (Olmsted)	132	2	129	0	263
Arkansas River (L1)	0	12	7	0	19
Weekly total - 2021	281	15	295	0	591
Weekly total - 2020	345	39	429	0	813
2021 YTD[1]	19,560	1,456	6,537	225	27,778
2020 YTD[1]	14,060	1,532	11,342	121	27,055
2021 as % of 2020 YTD	139	95	58	185	103
Last 4 weeks as % of 2020[2]	70	116	40	92	56
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.

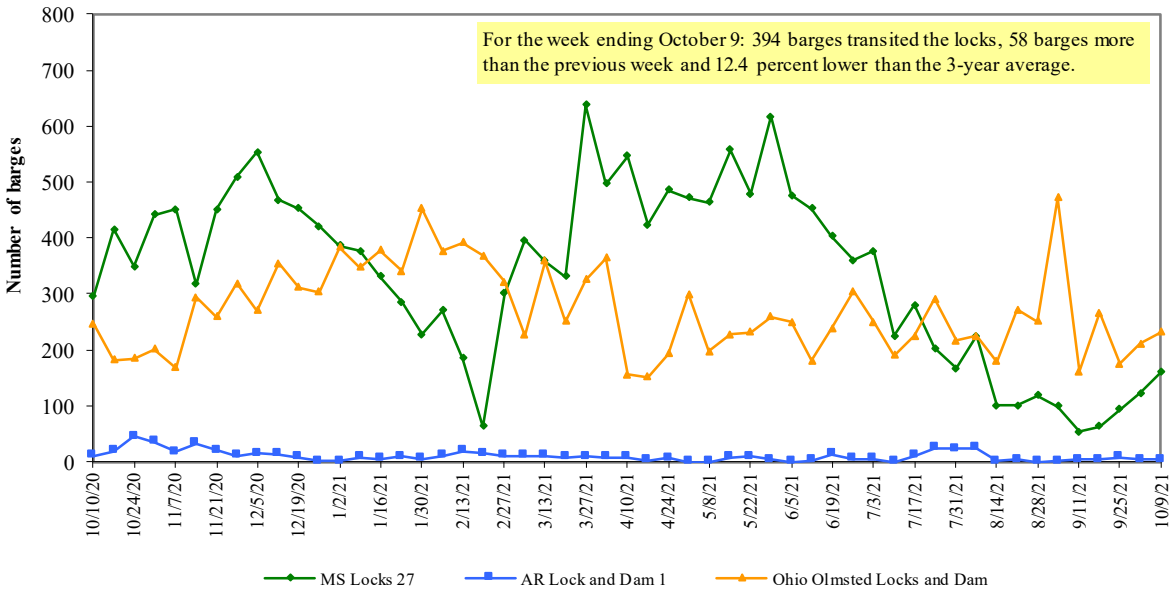
[2] As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

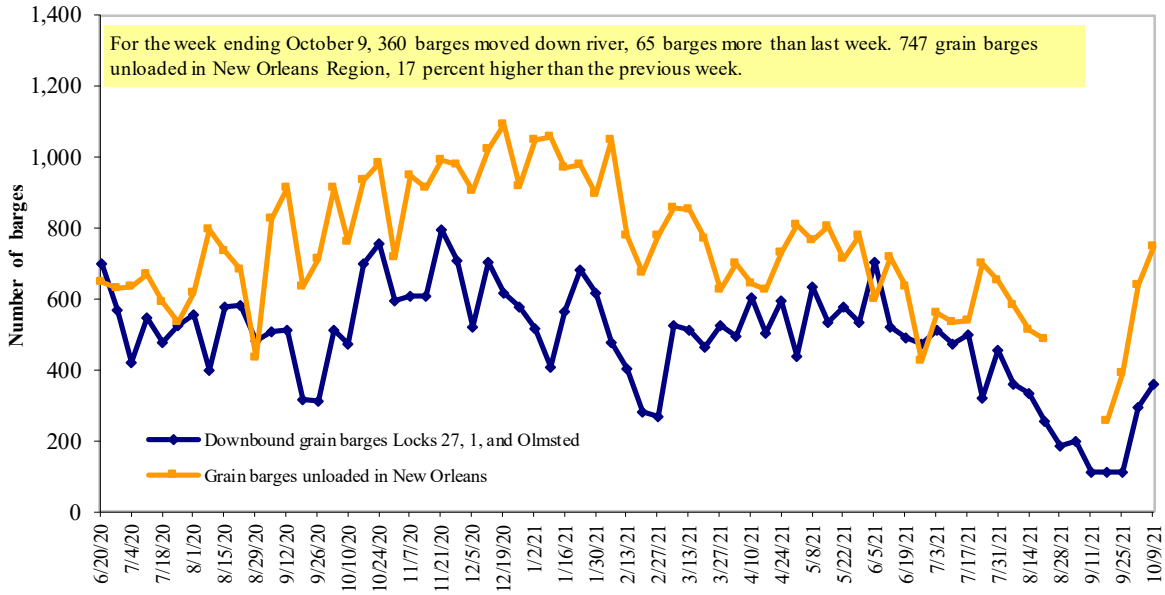
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 10/11/2021 (U.S. $/gallon)

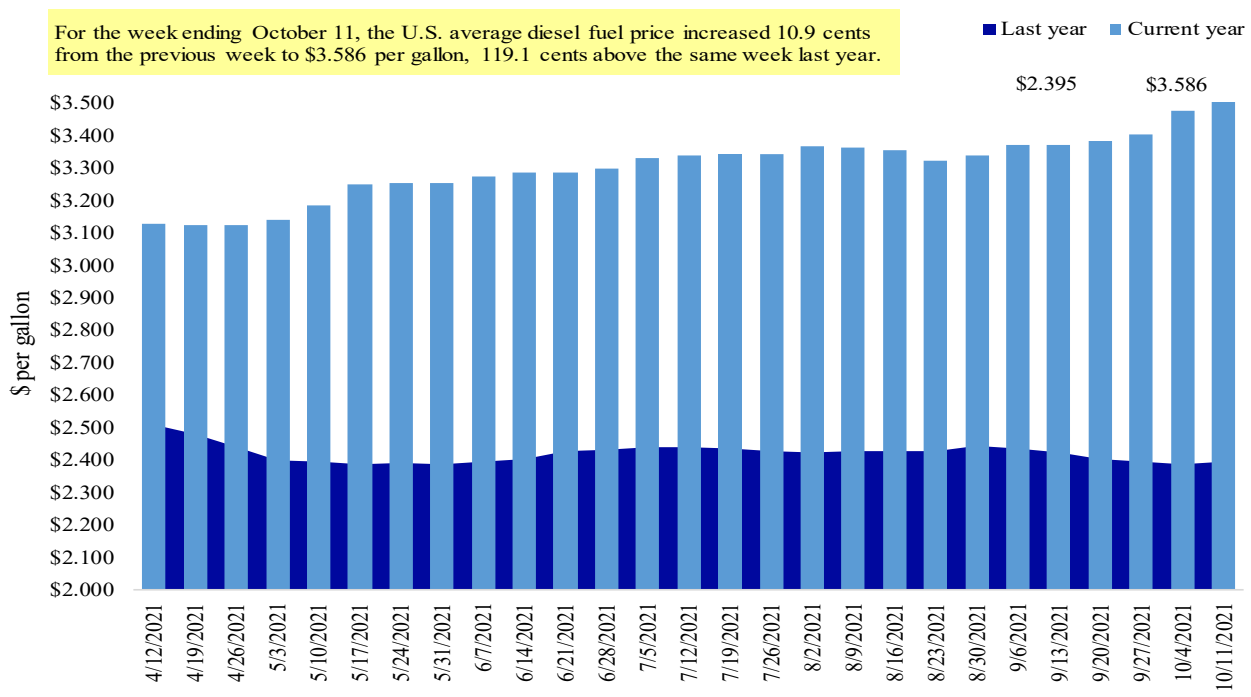
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.562	0.126	1.089
	New England	3.459	0.124	0.881
	Central Atlantic	3.705	0.133	1.056
	Lower Atlantic	3.484	0.122	1.152
II	Midwest	3.538	0.108	1.263
III	Gulf Coast	3.335	0.132	1.187
IV	Rocky Mountain	3.673	0.033	1.343
V	West Coast	4.133	0.061	1.200
	West Coast less California	3.784	0.067	1.246
	California	4.425	0.056	1.167
Total	United States	3.586	0.109	1.191

[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]									
9/30/2021	1,518	672	852	553	61	3,655	24,085	23,327	51,066
This week year ago	1,513	314	1,667	1,316	220	5,030	22,170	33,970	61,170
Cumulative exports-marketing year[2]									
2021/22 YTD	2,839	1,093	2,233	1,526	61	7,753	2,497	2,002	12,251
2020/21 YTD	3,875	850	2,603	1,842	322	9,491	3,678	6,577	19,746
YTD 2021/22 as % of 2020/21	73	129	86	83	19	82	68	30	62
Last 4 wks. as % of same period 2020/21*	106	227	57	43	24	77	108	67	83
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 09/30/2021	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	6,285	4,679	34	14,817
Japan	1,882	3,284	(43)	11,082
China	11,918	9,975	19	7,920
Columbia	1,041	994	5	4,491
Korea	72	347	(79)	3,302
Top 5 importers	**21,198**	**19,278**	**10**	**41,613**
Total U.S. corn export sales	**26,581**	**25,848**	**3**	**53,145**
% of projected exports	42%	37%		
Change from prior week[2]	**1,265**	**1,226**		
Top 5 importers' share of U.S. corn export sales	80%	75%		78%
USDA forecast October 2021	**63,613**	**70,051**	**(9)**	
Corn use for ethanol USDA forecast, October 2021	**132,080**	**127,813**	**3**	

[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 09/30/2021	Total commitments[2] 2021/22 current MY	Total commitments[2] 2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
				- 1,000 mt -
China	12,440	22,108	(44)	21,666
Mexico	1,683	2,114	(20)	4,754
Egypt	588	634	(7)	3,093
Indonesia	288	557	(48)	2,325
Japan	596	630	(5)	2,275
Top 5 importers	**15,594**	**26,043**	**(40)**	**34,113**
Total U.S. soybean export sales	**25,328**	**40,547**	**(38)**	**50,758**
% of projected exports	44%	66%		
change from prior week[2]	**1,042**	**2,534**		
Top 5 importers' share of U.S. soybean export sales	62%	64%		**67%**
USDA forecast, October 2021	**56,948**	**61,717**	**92**	

[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 09/30/2021	Total Commitments[2] 2021/22 current MY	Total Commitments[2] 2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
		1,000 mt -		- 1,000 mt -
Mexico	1,984	1,697	17	3,388
Philippines	1,738	2,196	(21)	3,121
Japan	1,179	1,355	(13)	2,567
Korea	746	858	(13)	1,501
Nigeria	1,263	643	96	1,490
China	848	1,480	(43)	1,268
Taiwan	449	674	(33)	1,187
Indonesia	59	608	(90)	1,131
Thailand	290	363	(20)	768
Italy	118	458	(74)	681
Top 10 importers	**8,674**	**10,332**	(16)	**17,102**
Total U.S. wheat export sales	**11,408**	**14,521**	(21)	**24,617**
% of projected exports	48%	54%		
change from prior week[2]	**333**	**531**		
Top 10 importers' share of U.S. wheat export sales	76%	71%		69%
USDA forecast, October 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 10/07/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	168	400	42	12,009	12,902	93	87	93	15,966
Corn	0	0	n/a	12,368	8,255	150	8	6	9,969
Soybeans	931	358	260	5,275	5,845	90	71	177	14,028
Total	**1,099**	**758**	**145**	**29,652**	**27,002**	**110**	**66**	**95**	**39,963**
Mississippi Gulf									
Wheat	138	59	235	2,626	3,145	84	86	108	3,422
Corn	450	638	70	32,440	22,499	144	83	88	28,781
Soybeans	520	399	130	13,101	21,608	61	34	44	38,013
Total	**1,107**	**1,096**	**101**	**48,168**	**47,252**	**102**	**51**	**63**	**70,215**
Texas Gulf									
Wheat	114	146	79	3,365	3,751	90	77	142	4,248
Corn	32	2	n/a	503	610	82	113	165	723
Soybeans	55	0	n/a	711	544	131	24	71	2,098
Total	**202**	**148**	**136**	**4,579**	**4,905**	**93**	**66**	**132**	**7,068**
Interior									
Wheat	34	20	172	2,447	1,697	144	160	124	2,263
Corn	250	201	124	7,572	6,692	113	139	135	8,683
Soybeans	100	104	96	4,383	5,113	86	53	64	7,274
Total	**385**	**325**	**118**	**14,402**	**13,502**	**107**	**103**	**106**	**18,220**
Great Lakes									
Wheat	2	23	7	343	684	50	43	26	891
Corn	0	0	n/a	94	54	174	n/a	0	111
Soybeans	0	22	0	89	407	22	17	24	1,111
Total	**2**	**45**	**4**	**526**	**1,145**	**46**	**28**	**25**	**2,113**
Atlantic									
Wheat	2	0	n/a	125	28	452	n/a	n/a	65
Corn	1	13	7	57	26	220	140	92	33
Soybeans	58	6	n/a	1,150	740	155	27	56	1,870
Total	**60**	**19**	**319**	**1,331**	**794**	**168**	**44**	**83**	**1,968**
U.S. total from ports*									
Wheat	458	648	71	20,915	22,206	94	88	102	26,854
Corn	733	855	86	53,034	38,137	139	81	80	48,301
Soybeans	1,663	889	187	24,708	34,257	72	45	69	64,394
Total	**2,855**	**2,391**	**119**	**98,658**	**94,600**	**104**	**62**	**79**	**139,548**

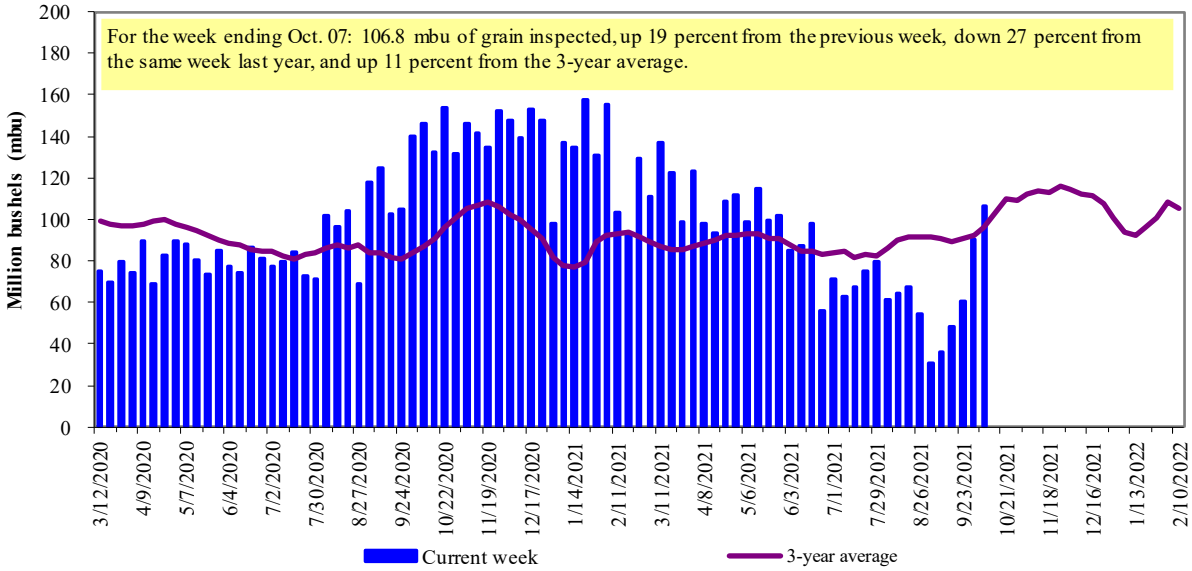
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

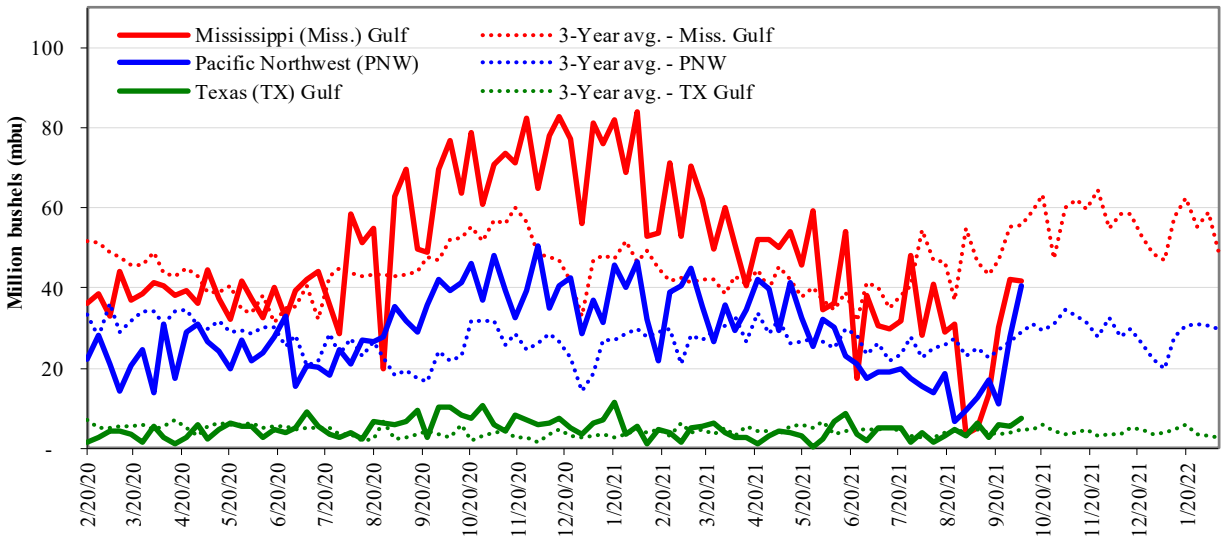


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 10/07/21 inspections (mbu):	
MS Gulf:	41.9
PNW:	40.4
TX Gulf:	7.5

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	unchanged	up 38	up 4	up 45
Last Year (same wk):	down 45	down 27	down 43	up 3
3-yr avg. (4-wk. mov. Avg):	down 17	up 85	down 9	up 57

Source: USDA, Federal Grain Inspection Service.

Table 17

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

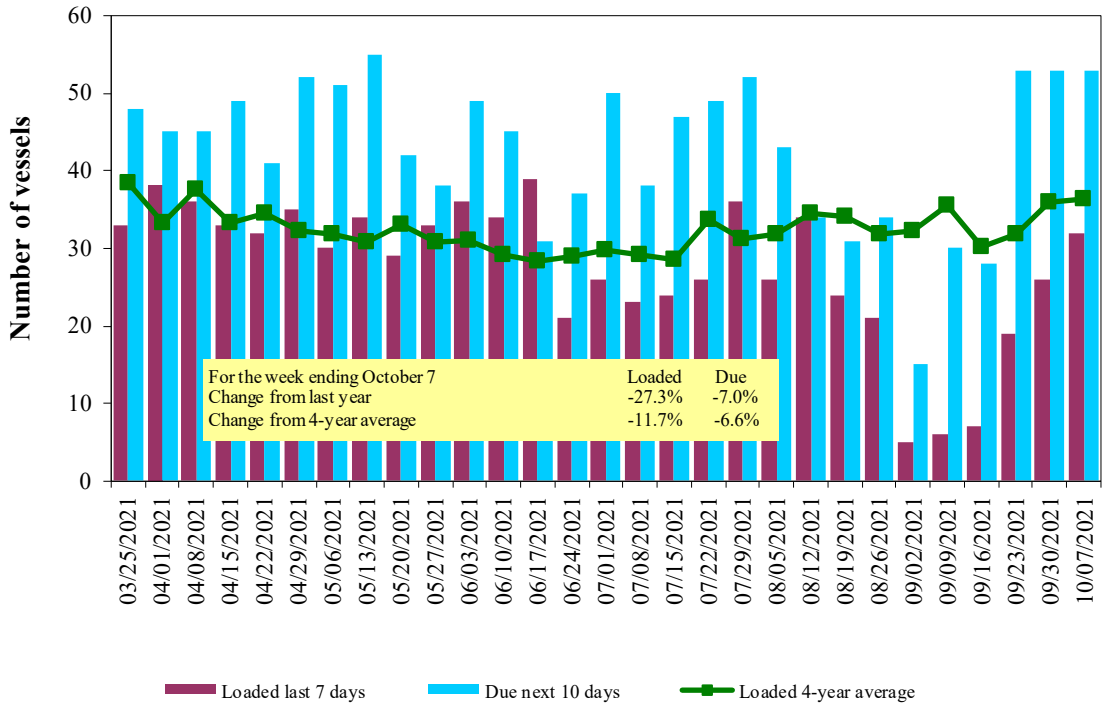
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
10/7/2021	49	32	53	13
9/30/2021	57	26	53	11
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

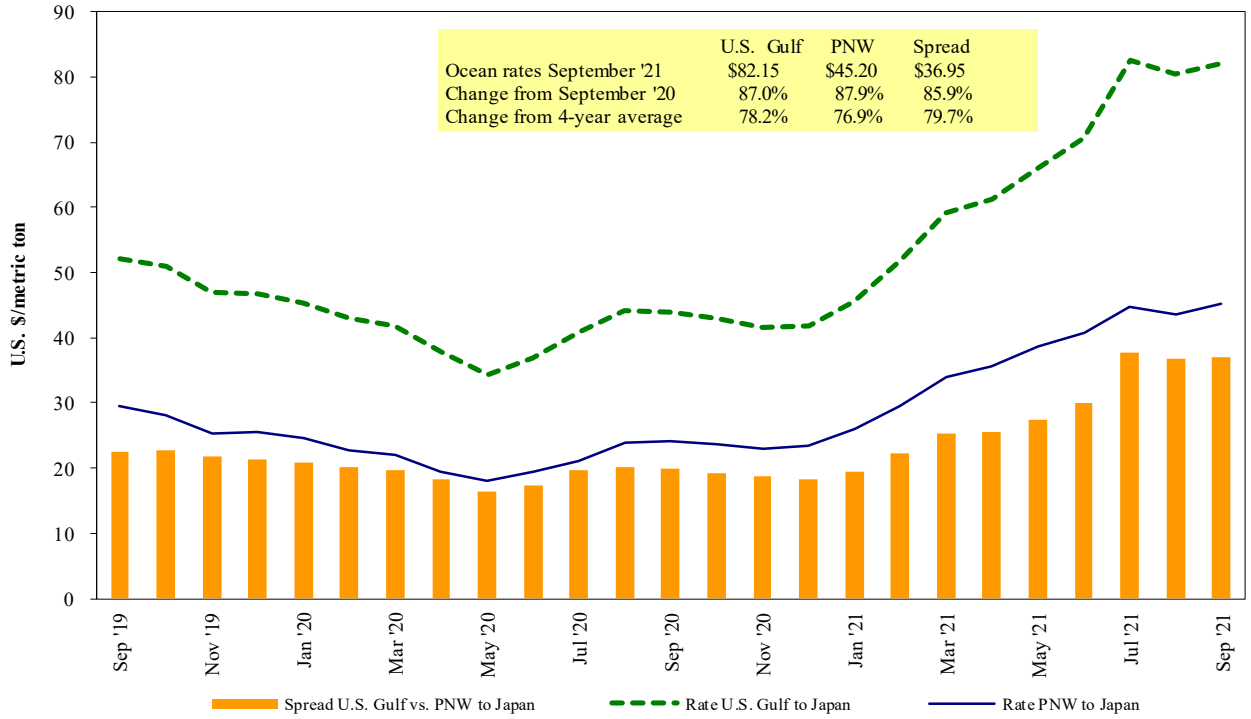
U.S. Gulf[1] vessel loading activity



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

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

Ocean freight rates for selected shipments, week ending 10/09/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Oct 1/10, 2021	48,000	70.10
U.S. Gulf	Japan	Heavy grain	Aug 21/Sep 9, 2021	50,000	60.90
U.S. Gulf	Japan	Heavy grain	Aug 1/10, 2021	50,000	69.75
U.S. Gulf	Sudan	Wheat	Sep 1/10, 2021	49,000	79.12*
U.S. Gulf	China	Heavy grain	Nov 1/10, 2021	66,000	89.00
U.S. Gulf	China	Heavy grain	Oct 1/10, 2021	55,000	81.50
U.S. Gulf	Djibouti	Wheat	Jul 6/16, 2021	5,880	85.70*
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, 2021	55,000	65.50
River Plate	South Korea	Corn	Oct 21	67,000	79.80

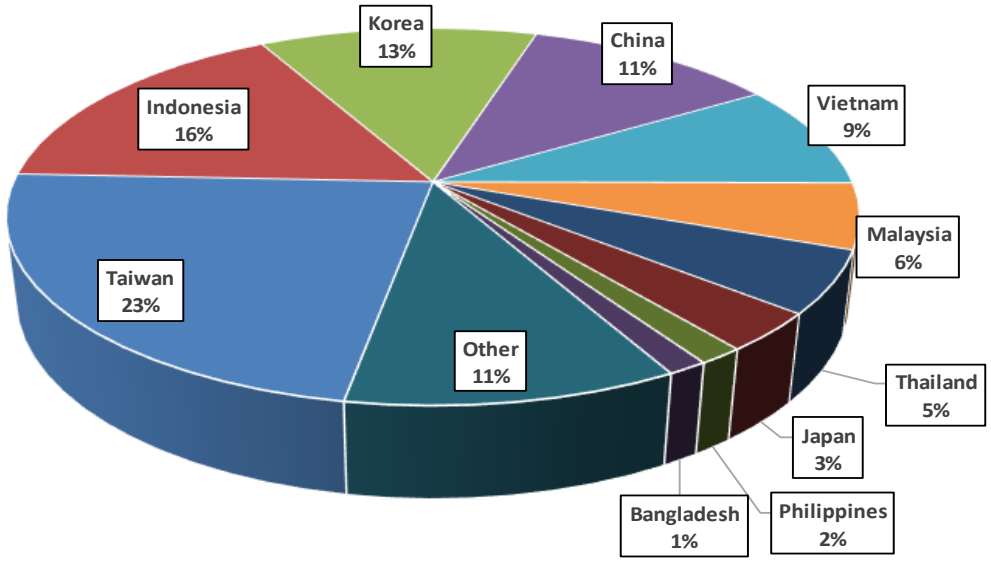
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

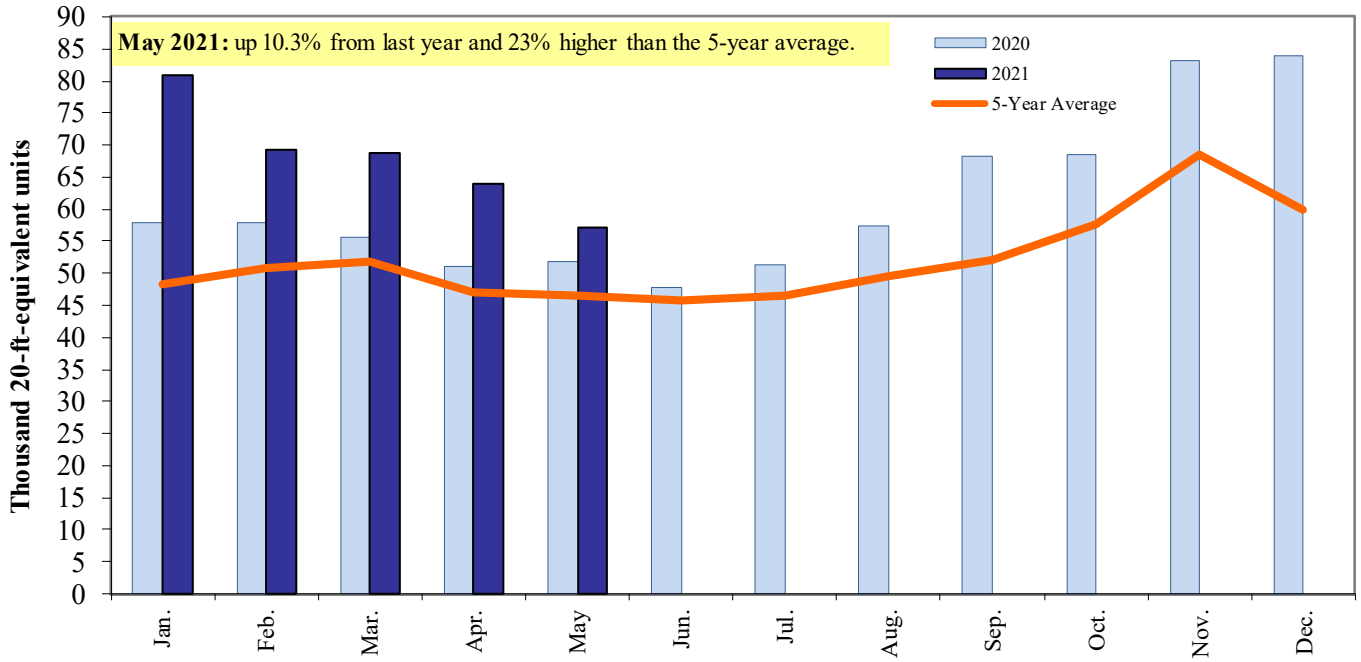
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2021



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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