



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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October 21, 2021

WEEKLY HIGHLIGHTS

Downbound Barged Grain Movements Increase With the Harvest and Recovery From Ida

Downbound barged grain movements and barge-unload operations in the New Orleans region appear to have gradually recovered from Hurricane Ida's impacts, including damaged hopper barges (among other logistical challenges), as the grain harvest has progressed. Right after the hurricane, in early September, weekly downbound barged grain movements dropped to their lowest level since May 2013. For a few weeks after the hurricane, barge-unload operations in the New Orleans region were mostly halted, but they have slowly recovered since late September. Barge movements and unloads typically increase around this time of the year, as river States progress with their harvests. For the week ending October 16, downbound barged grain movements through the Mississippi River locking system reached 813,670 tons, 38 percent higher than last week and more than 2.8 times higher than the average weekly tonnage in September (**GTR table 10**). For the week ending October 16, 772 barges were unloaded, 1.38 times more than the weekly average in September after operations resumed (**GTR fig. 12**).

FMC Urges Ocean Carriers To Adopt Detention and Demurrage Best Practices

The Federal Maritime Commission (FMC) recently [sent a letter](#) to all major ocean carriers calling on them to adopt three best practices related to detention and demurrage. The best practices are intended to promote clarity and certainty about how and when fees will be assessed and how charges can be disputed. Based on information collected from the top nine ocean carriers last year, FMC urged carriers to adopt the following industry standards: display charges clearly and prominently on their websites or customer portals; develop and document clear internal processes on all matters regarding detention and demurrage; and clearly define (on websites and invoices) dispute resolution procedures, contacts, and necessary documents. If adopted, these new best practices would serve as an initial step toward aligning carrier documents and policies with the goals of the FMC's Interpretive Rule on Demurrage and Detention Under the Shipping Act, enacted in May 2020.

Port of Savannah Increases Container Capacity

The Georgia Ports Authority (GPA) recently announced it will add 1.6 million 20-foot-equivalent units (TEU) in container-handling capacity [to the Port of Savannah](#). Including another 230 acres of container-handling space, the expansion will come online in phases, with the first to be completed as early as December. The entire project is expected to be fully completed in 2023. In 2020, the Port of Savannah [ranked sixth in the Nation](#) for containerized waterborne agricultural exports. Animal feed—mostly distillers' dried grains with solubles (DDGS)—was one of the Port's top agricultural exports (a 17-percent share).

Snapshots by Sector

Export Sales

For the week ending October 7, **unshipped balances** of wheat, corn, and soybeans for marketing year 2021/22 totaled 50.7 million metric tons (mmt), down 17 percent from same time last year and down 1 percent from last week. Net **corn export sales** were 1.040 mmt, down 18 percent from last week. Net **soybean export sales** were 1.148 mmt, up 10 percent from last week. Net weekly **wheat export sales** were 0.568 mmt, up 70 percent from last week.

Rail

U.S. Class I railroads originated 24,037 **grain carloads** during the week ending October 9. This was an 8-percent decrease from the previous week, 13 percent less than last year, and 1 percent more than the 3-year average.

Average October shuttle **secondary railcar** bids/offers (per car) were \$128 above tariff for the week ending October 14. This was \$69 more than last week. There were no non-shuttle bids/offers this week.

Barge

For the week ending October 16, **barged grain movements** totaled 813,670 tons. This was 38 percent higher than the previous week and 8 percent higher than the same period last year.

For the week ending October 16, 510 grain barges **moved down river**—150 barges more than the previous week. There were 772 grain barges unloaded in the New Orleans region, 3 percent more than last week.

Ocean

For the week ending October 14, 42 **oceangoing grain vessels** were loaded in the Gulf—27 percent more than the same period last year. Within the next 10 days (starting October 15), 51 vessels were expected to be loaded—22 percent fewer than the same period last year.

As of October 14, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$84.75. This was 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$47.00 per mt, 1 percent more than the previous week.

Fuel

For the week ending October 18, the U.S. average **diesel fuel price** increased by 8.5 cents from the previous week to \$3.671 per gallon, \$1.28 above the same week last year. At \$4.53 per gallon, California diesel prices are the highest since August 2008.

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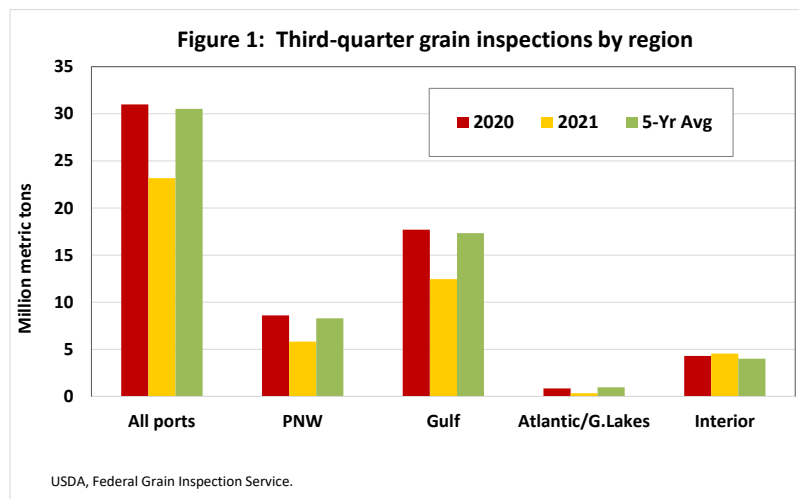
Year-to-Year Grain Inspections Recede for Third Quarter 2021

From third quarter 2020 to third quarter 2021 (year to year), inspections of grain (wheat, corn, and soybeans) fell 29 percent, to 23.2 million metric tons (mmt). Down 24 percent from the 5-year average, this volume was the lowest since third quarter 2015. Year to year, inspections of corn were down slightly, while wheat inspections increased moderately. Soybean inspections fell sharply year to year, as shipments to China receded. In the Pacific Northwest (PNW) and the U.S. Gulf—the Nation’s two top export regions—total inspections of grain decreased notably, both year to year and from the 5-year averages.

Total Inspections by Region

U.S. Gulf. Third-quarter grain inspections in the U.S. Gulf were 12.5 mmt, down 30 percent from year to year (fig. 1) and 28 percent below the 5-year average. Third-quarter U.S. Gulf soybean inspections (2.2 mmt)—down 74 percent from last year and 70 percent below average—were the main component driving declines in total U.S. Gulf grain inspections. U.S. Gulf corn inspections (7 mmt) increased by 7 percent year to year. U.S. Gulf wheat inspections were up 26 percent year to year and up 30 percent from the 5-year average. The U.S. Gulf’s share (54 percent) of total grain exports was down year to year. Over the same time period, third-quarter rail deliveries of grain to the U.S. Gulf ports fell 42 percent, while barged grain movements through the Mississippi River locks to the U.S. Gulf fell 39 percent.

PNW. Third-quarter PNW grain inspections totaled 5.8 mmt, down 32 percent year to year (fig. 1) and 30 percent below the 5-year average. The decreases mainly reflected falling corn and soybean inspections. Like U.S. total third-quarter grain inspections, PNW inspections were the lowest since 2015. Third-quarter PNW corn inspections (1.6 mmt) dropped 45 percent year to year, while soybean inspections (.560 mmt) dropped 64 percent. Drops in inspections of both these commodities reflected declining shipments to Asia. Year to year, PNW inspections of soybeans destined to China were down 64 percent. PNW wheat inspections (3.6 mmt) were down 12 percent year to year—4 percent above the 5-year average. Third-quarter rail deliveries of grain to PNW ports decreased 47 percent year to year.



Atlantic-Great Lakes. Third-quarter Atlantic-Great Lakes grain inspections totaled .348 mmt, down 59 percent year to year and 65 percent below the 5-year average. Year to year, corn inspections in the region increased 60 percent. However, wheat inspections decreased 55 percent (59 percent below the 5-year average), and soybean inspections decreased 78 percent year to year—79 percent below the 5-year average. Total Atlantic-Great Lakes wheat inspections were down 55 percent year to year and 59 percent below average.

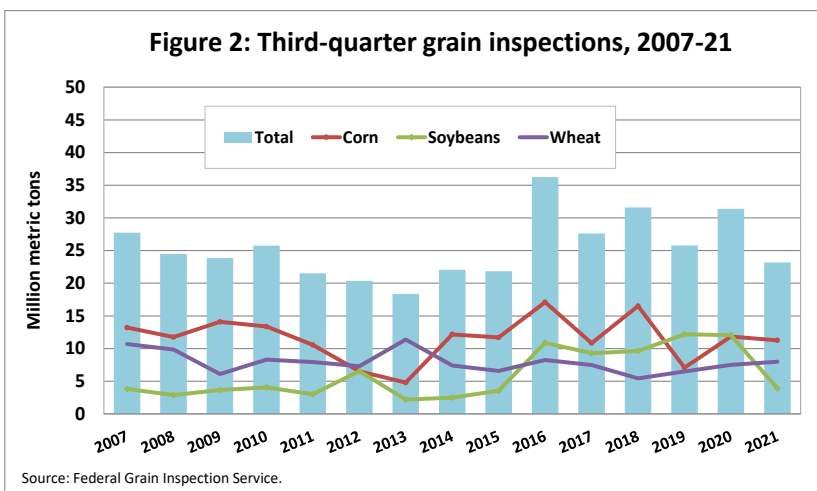
Interior. Third-quarter Interior inspections of grain reached a record 4.6 mmt, up 7 percent year to year and up 14 percent from the 5-year average. The Interior accounted for 20 percent of the U.S. total third-quarter grain inspections. Exports to Mexico accounted for 89 percent of total third-quarter Interior grain inspections—a year-to-year rise. Exports to Asia accounted for 11 percent of total Interior grain inspections, down 48 percent year to year. Interior soybean inspections (.997 mmt) were down 32 percent year to year and down 26 percent from the 5-year average. However, year to year, as demand from Mexico remained strong, corn inspections reached a record 2.6 mmt (an 11-percent increase). Likewise, supported

by solid demand from Mexico, as well as a substantial rise in shipments to Asia, wheat inspections reached a record .998 mmt (a 104-percent increase).

Inspections by Commodity—Corn, Soybeans, and Wheat

Third-quarter U.S. corn inspections totaled 11.3 mmt, down 5 percent year to year (fig. 2). Third-quarter U.S. corn exports were 11 percent below the 5-year average. Year to year, total third-quarter corn inspections from all port regions to Asia did not change and, to Latin America, decreased 24 percent.

Third-quarter soybean inspections were 3.9 mmt, down 68 percent year to year (fig. 2) and down 64 percent from the 5-year average. Soybean inspections were also the lowest since 2015, with soybean shipments destined to China dropping 67 percent year to year and accounting for only 30 percent of total U.S. third-quarter soybean inspections. About 55 percent of U.S. third-quarter soybean exports were destined to Asia, down 64 percent year to year and 62 percent below the 5-year average.



Third-quarter inspections of wheat totaled 8 mmt, up 7 percent year to year (fig. 2) and 14 percent above the 5-year average. At 3.1 mmt, third-quarter export total inspections of wheat destined to Asia decreased 21 percent year to year. At 2 mmt, total wheat inspected for export to Latin America decreased 5 percent year to year.

Market Outlook

According to the October *World Agricultural Supply and Demand Estimates (WASDE)*, exports of corn, soybeans, and wheat are expected to decrease 9 percent from marketing year (MY) 2020/21 to MY 2021/22. Since the September *WASDE*, MY 2021/22 projections are adjusted up 1 percent for corn exports, but are unchanged for soybean and wheat exports. Compared to MY 2020/21, cumulative (shipped) export sales for MY 2021/22 are currently down 24 percent for corn, down 59 percent for soybeans, and down 18 percent for wheat (*GTR table 12*). Johnny.Hill@usda.gov

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Non-Shuttle	Shuttle		Gulf	Pacific
10/20/21	246	297	234	350	379	333
10/13/21	241	297	235	275	377	330

¹Indicator: 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)

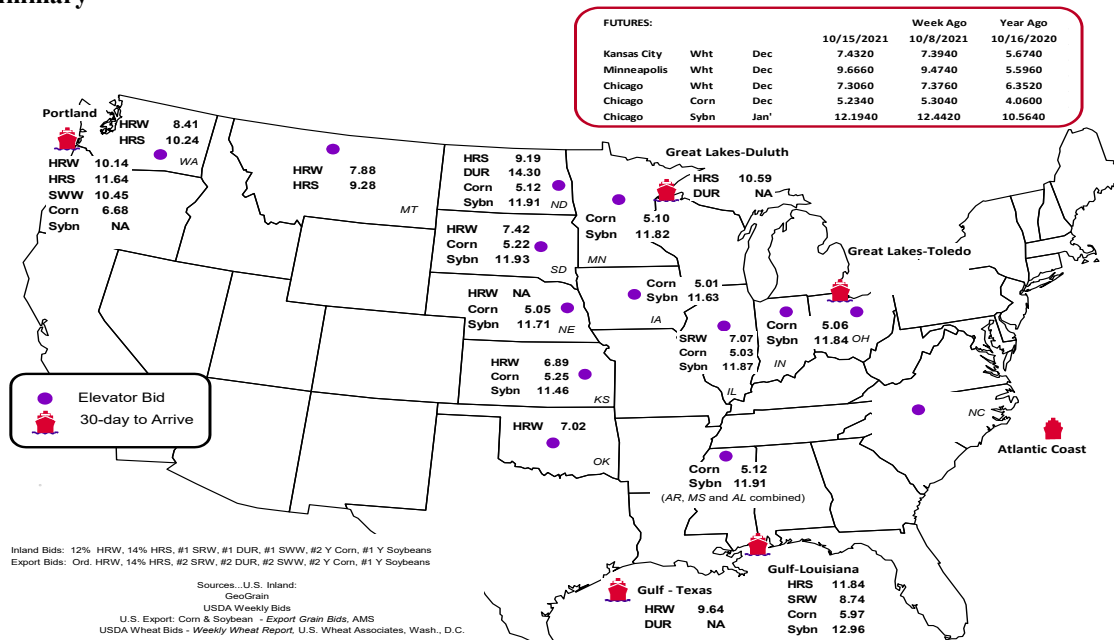
Commodity	Origin-destination	10/15/2021	10/8/2021
Corn	IL-Gulf	-0.94	-1.01
Corn	NE-Gulf	-0.92	-0.96
Soybean	IA-Gulf	-1.33	-1.38
HRW	KS-Gulf	-2.75	-2.75
HRS	ND-Portland	-2.45	-2.31

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		Pacific	Atlantic &	Total	Week ending	Cross-border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
10/13/2021 ^P	906	1,703	9,478	1,136	13,223	10/9/2021	2,189
10/06/2021 ^r	514	1,166	7,972	556	10,208	10/2/2021	2,786
2021 YTD ^r	38,721	52,314	219,936	12,735	323,706	2021 YTD	113,759
2020 YTD ^r	23,742	39,567	201,046	11,437	275,792	2020 YTD	100,543
2021 YTD as % of 2020 YTD	163	132	109	111	117	% change YTD	113
Last 4 weeks as % of 2020 ²	27	83	89	75	78	Last 4wks. % 2020	113
Last 4 weeks as % of 4-year avg. ²	45	112	127	118	114	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

¹Data is incomplete as it is voluntarily provided.

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

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

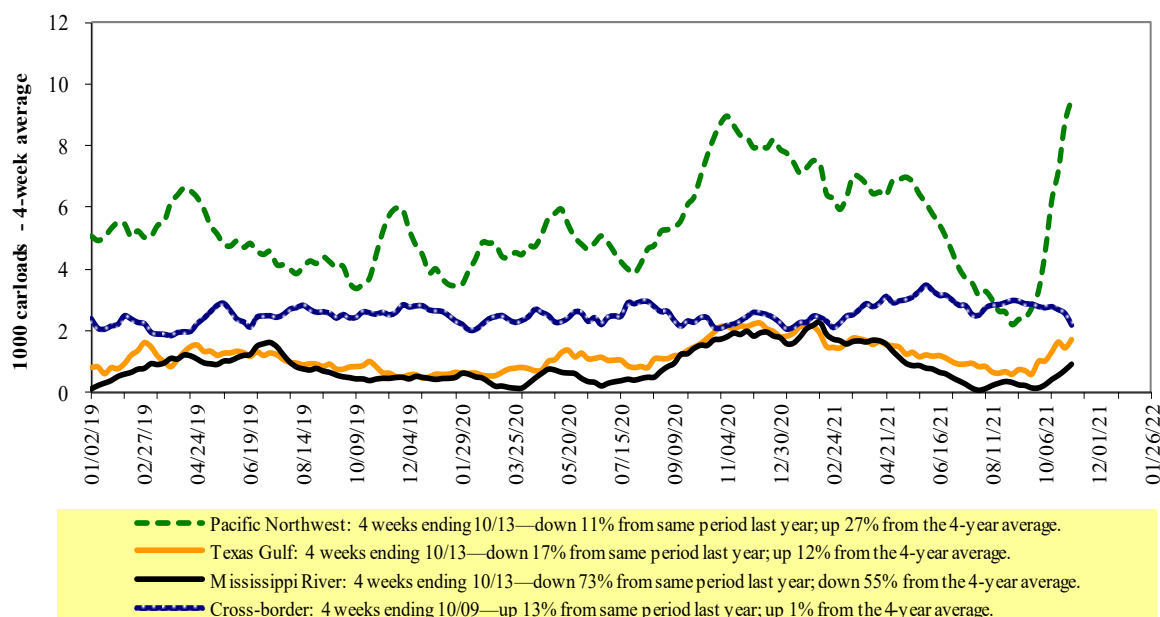
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

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

Figure 2

Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

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

For the week ending: 10/9/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,307	2,112	12,027	1,453	7,138	24,037	4,355	4,177
This week last year	2,017	2,819	13,680	1,558	7,446	27,520	5,295	5,344
2021 YTD	69,791	95,124	459,745	47,675	244,531	916,866	162,987	189,241
2020 YTD	67,204	96,089	452,429	44,085	215,591	875,398	170,426	190,301
2021 YTD as % of 2020 YTD	104	99	102	108	113	105	96	99
Last 4 weeks as % of 2020*	78	87	86	115	99	90	81	82
Last 4 weeks as % of 3-yr. avg.**	79	83	99	134	117	102	86	87
Total 2020	91,659	129,813	613,630	57,782	296,701	1,189,585	238,133	261,778

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

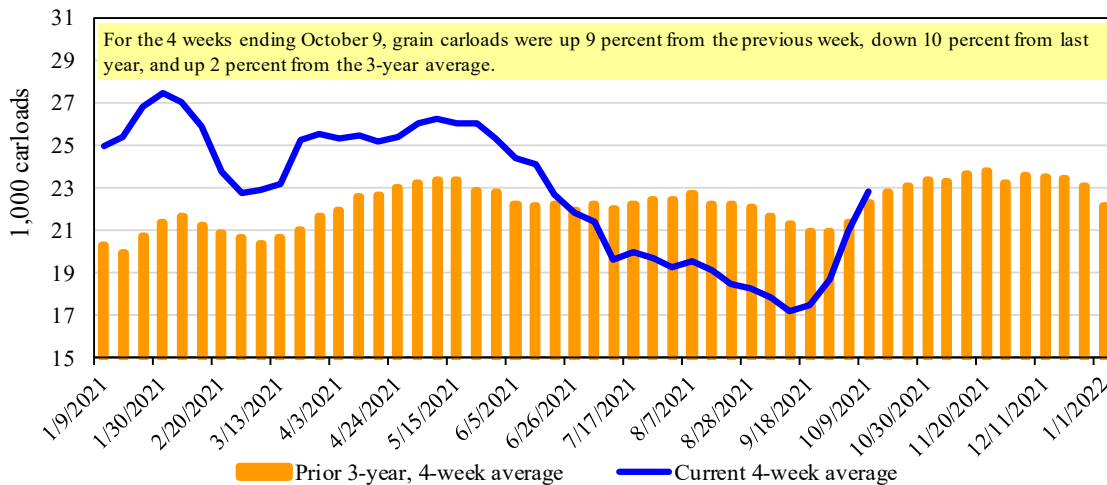
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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 offerings¹ (\$/car)²

For the week ending: 10/14/2021		Delivery period							
		Oct-21	Oct-20	Nov-21	Nov-20	Dec-21	Dec-20	Jan-22	Jan-21
BNSF ³	COT grain units	No offer	n/a	0	0	no bids	15	no bids	0
	COT grain single-car	No offer	n/a	134	0	1	0	0	0
UP ⁴	GCAS/Region 1	n/a	n/a	n/a	no offer	n/a	no offer	n/a	no offer
	GCAS/Region 2	n/a	n/a	n/a	no offer	n/a	no offer	n/a	no offer

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

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

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

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

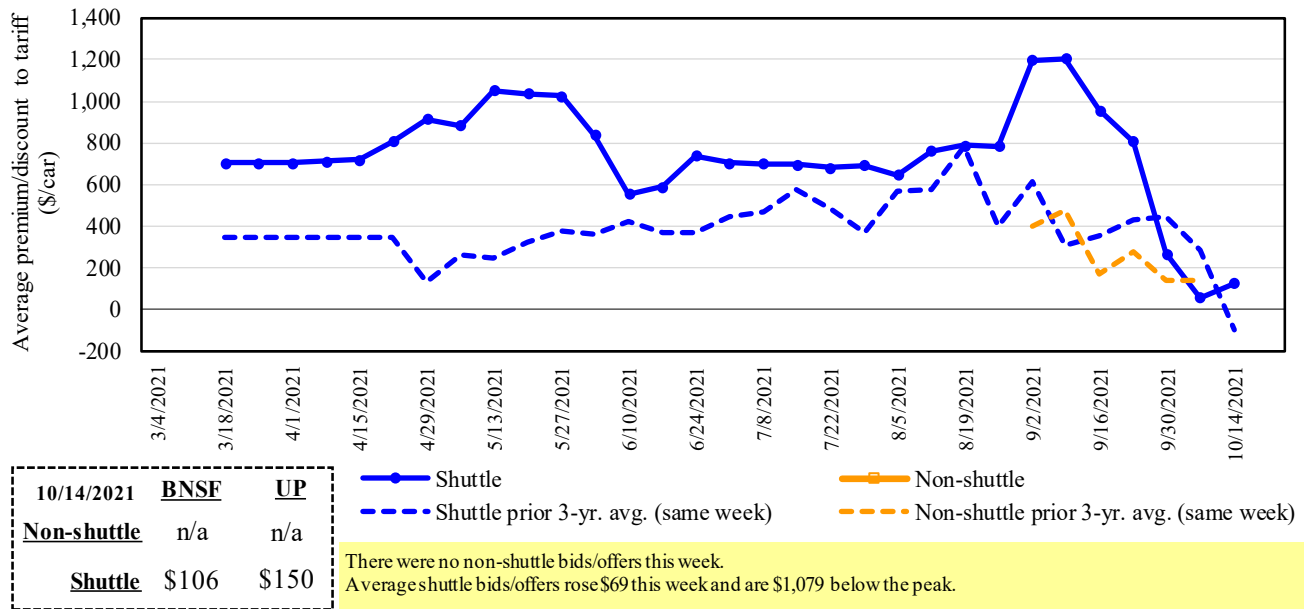
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

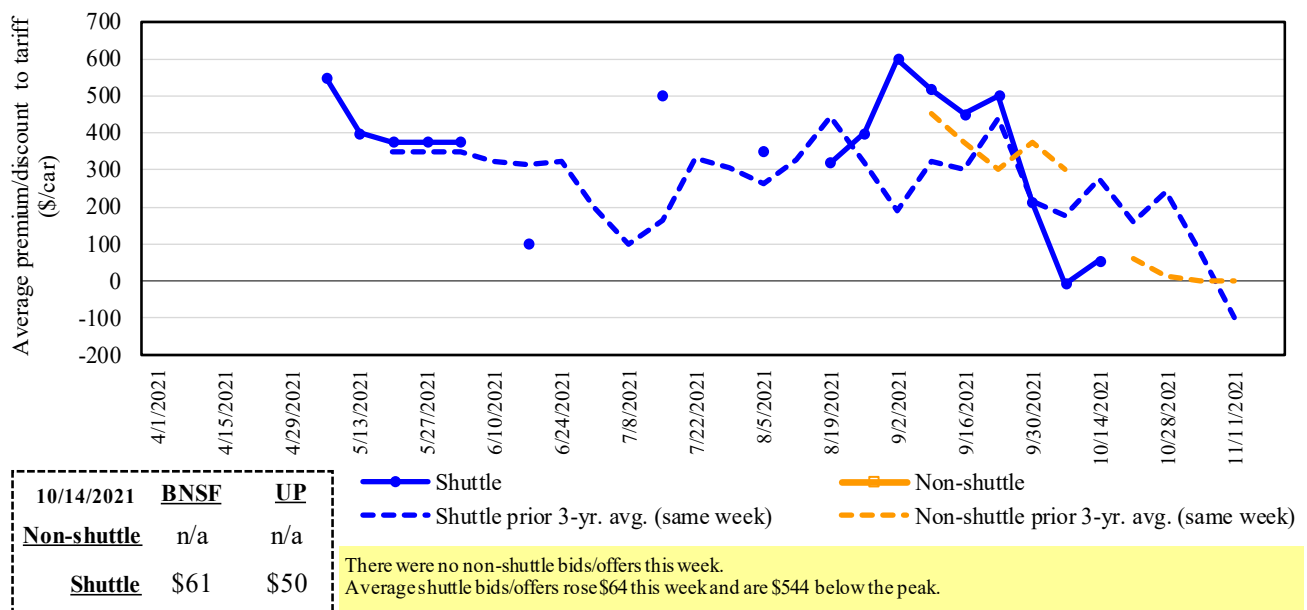
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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.

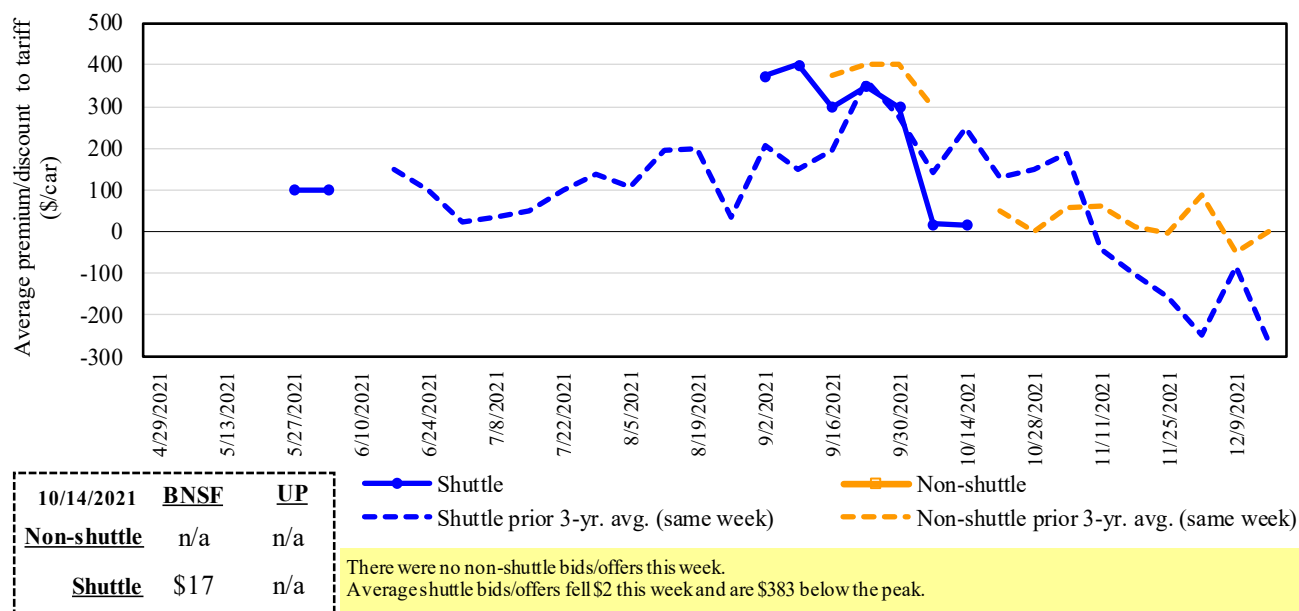
Figure 5
Bids/offers for railcars to be delivered in November 2021, secondary market



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



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
 Source: USDA, Agricultural Marketing Service.

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending:		Delivery period					
		Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22
10/14/2021							
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	106	61	17	n/a	n/a	n/a
	Change from last week	154	128	80	n/a	n/a	n/a
	Change from same week 2020	n/a	(806)	(883)	n/a	n/a	n/a
	UP-Pool	150	50	n/a	n/a	n/a	n/a
	Change from last week	(17)	0	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	(588)	n/a	n/a	n/a	n/a

¹Average 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 shipments¹

October 2021	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴	
					metric ton	bushel ²		
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	
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$353	\$54.36	\$1.48	5	
	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	
Soybeans	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	
	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	
Shuttle train	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$262	\$49.72	\$1.35	6	
	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
	Soybeans	Council Bluffs, IA	Stockton, CA	\$5,300	\$0	\$52.63	\$1.34	4
		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

¹A 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.

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

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

⁴Percentage 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			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
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	Tlahnepantla, EM	\$7,687	\$367	\$82.29	\$2.09	4
	SD	Torreón, 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	Torreón, 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	Torreón, CU	\$7,157	\$390	\$77.11	\$1.96	4

¹Rates 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.

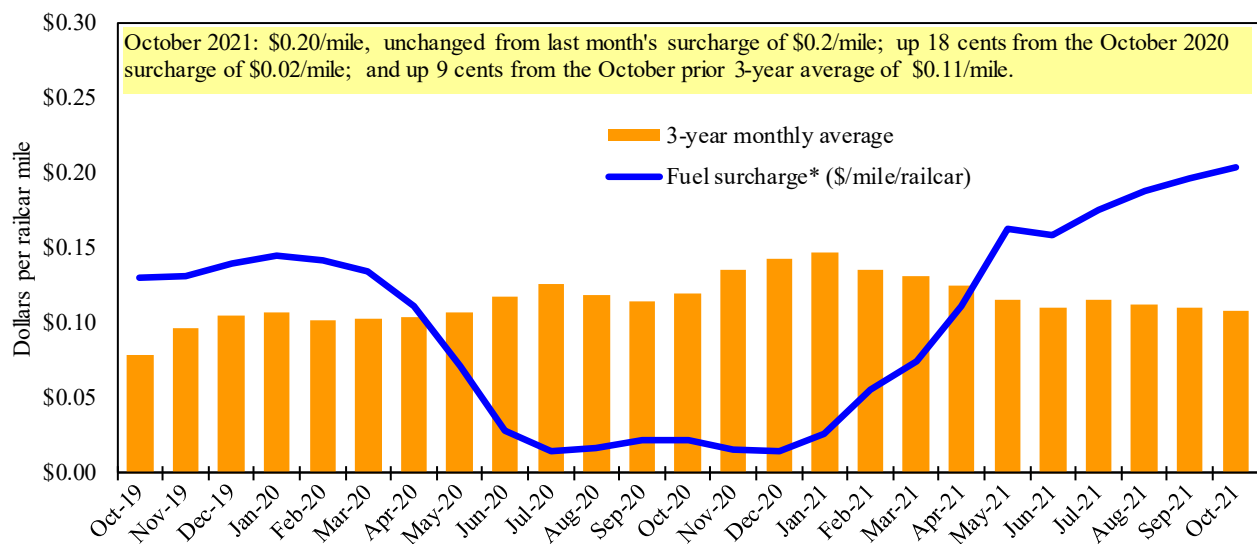
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

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

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

Figure 7

Railroad fuel surcharges, North American weighted average¹

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.

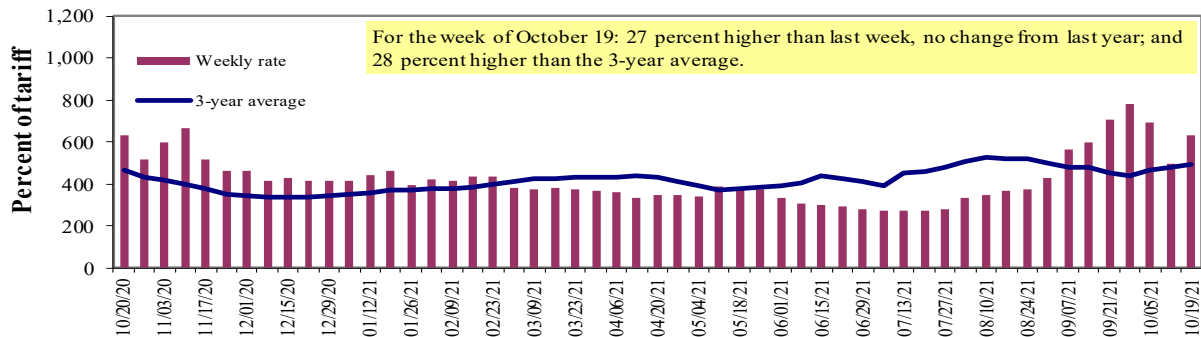
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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	10/19/2021	562	650	630	789	817	817	713
	10/12/2021	494	519	495	549	573	573	532
\$/ton	10/19/2021	34.79	34.58	29.23	31.48	38.32	33.01	22.39
	10/12/2021	30.58	27.61	22.97	21.91	26.87	23.15	16.70
Current week % change from the same week:								
	Last year	-13	2	0	45	54	54	22
	3-year avg. ²	14	31	42	89	82	82	78
Rate ¹	November	494	501	480	397	464	464	368
	January	-	-	433	322	351	351	302

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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

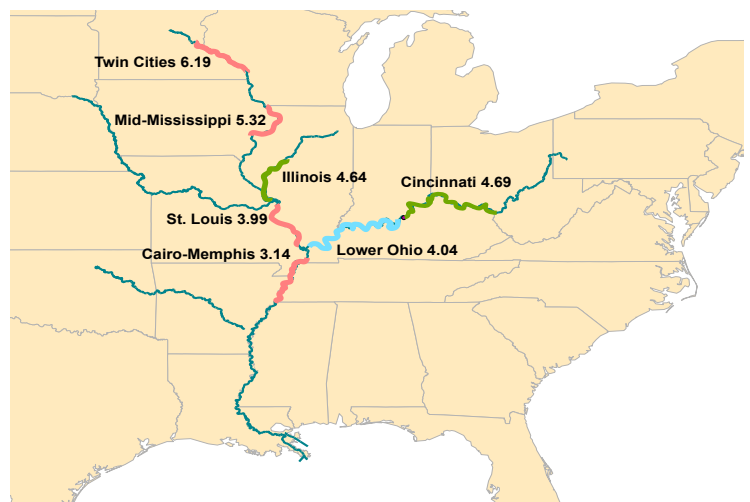
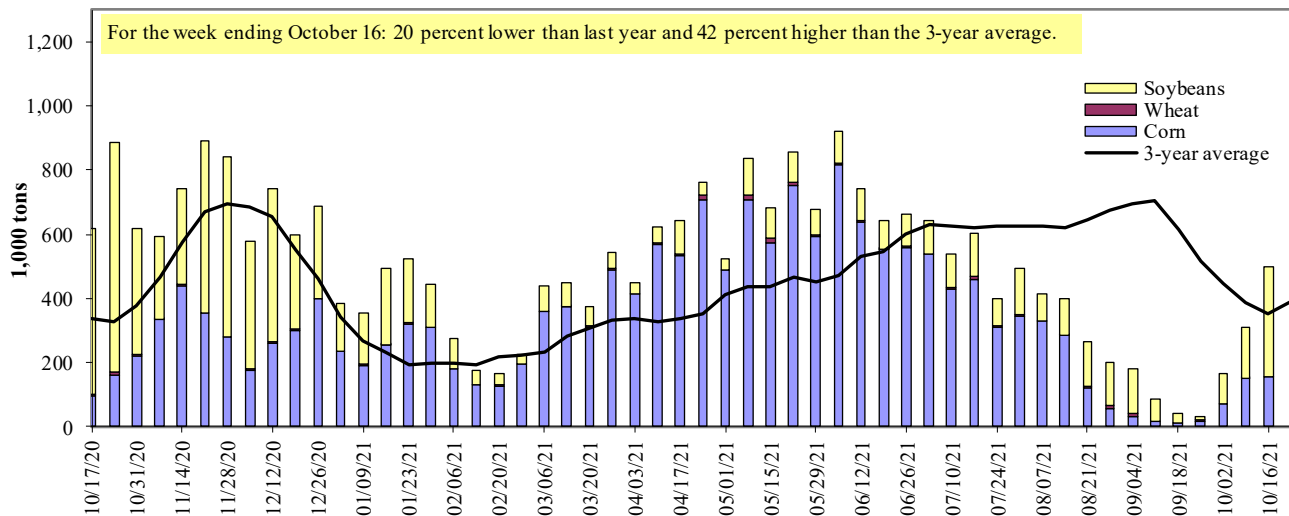


Figure 10

Barge movements on the Mississippi River¹ (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 10/16/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	25	2	127	0	154
Winfield, MO (L25)	80	0	207	0	287
Alton, IL (L26)	158	0	283	0	441
Granite City, IL (L27)	158	0	340	0	498
Illinois River (La Grange)					
	56	0	28	0	84
Ohio River (Olmsted)					
	185	2	75	2	264
Arkansas River (L1)					
	0	11	38	3	52
Weekly total - 2021	343	13	453	5	814
Weekly total - 2020	294	24	433	3	755
2021 YTD ¹	19,904	1,469	6,989	229	28,592
2020 YTD ¹	14,354	1,557	11,775	125	27,810
2021 as % of 2020 YTD	139	94	59	184	103
Last 4 weeks as % of 2020 ²	94	79	49	18	65
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.

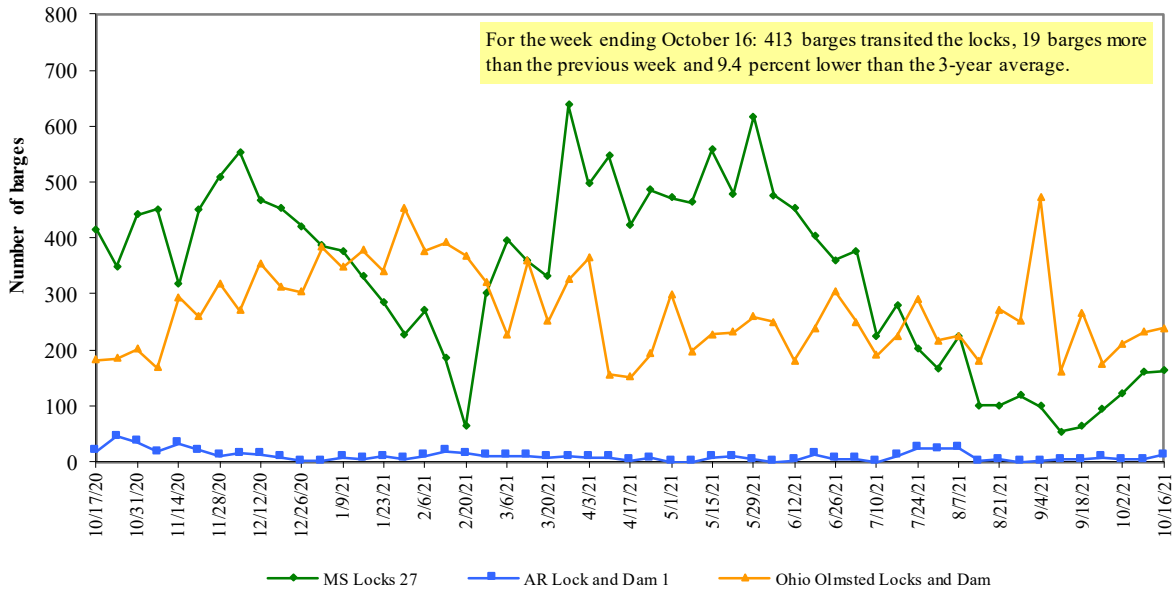
² As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

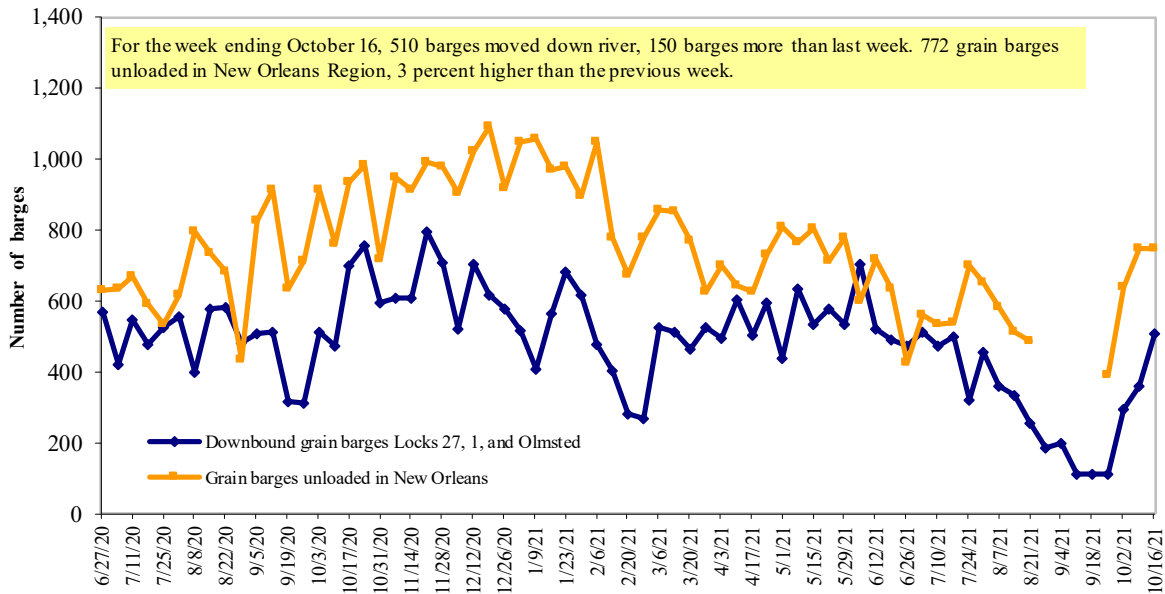
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 10/18/2021 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.655	0.093	1.190
	New England	3.555	0.096	0.980
	Central Atlantic	3.792	0.087	1.140
	Lower Atlantic	3.582	0.098	1.266
II	Midwest	3.615	0.077	1.346
III	Gulf Coast	3.422	0.087	1.279
IV	Rocky Mountain	3.732	0.059	1.406
V	West Coast	4.226	0.093	1.302
	West Coast less California	3.860	0.076	1.318
	California	4.530	0.105	1.291
Total	United States	3.671	0.085	1.283

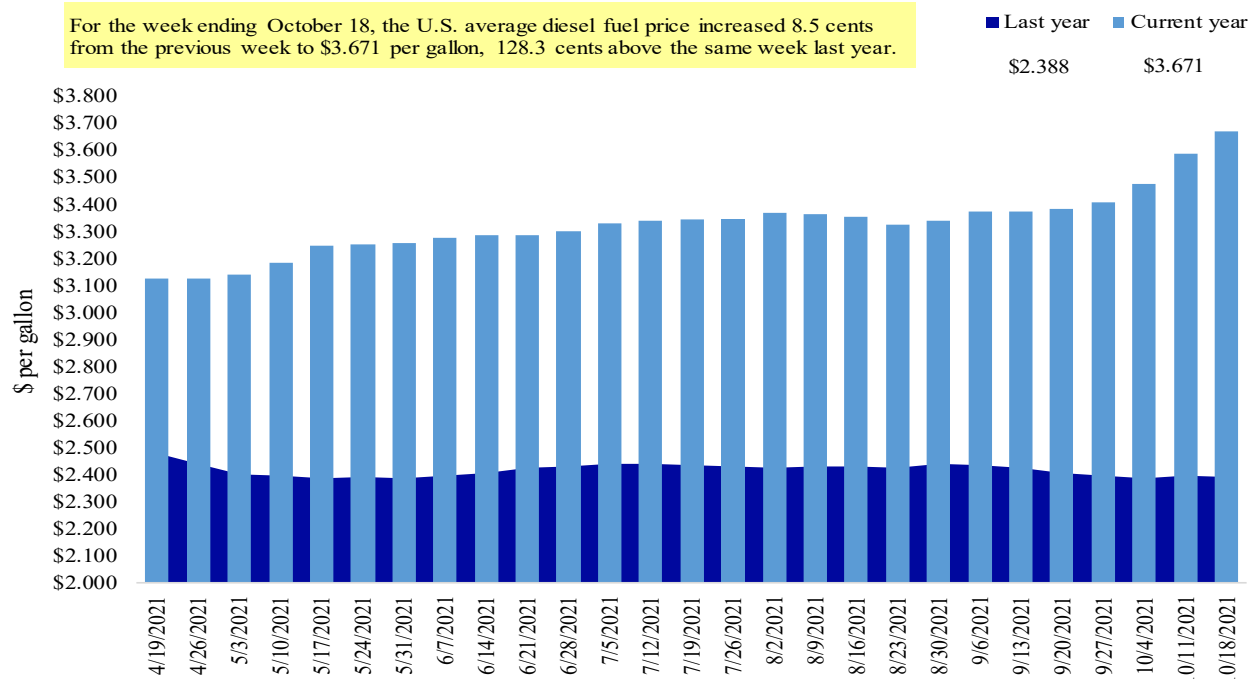
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending October 18, the U.S. average diesel fuel price increased 8.5 cents from the previous week to \$3.671 per gallon, 128.3 cents above the same week last year.



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

Grain Exports

Table 12

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

For the week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export balances¹									
10/7/2021	1,546	609	955	593	61	3,764	24,206	22,761	50,731
This week year ago	1,533	318	1,530	1,450	221	5,052	22,010	34,217	61,279
Cumulative exports-marketing year²									
2021/22 YTD	3,055	1,187	2,320	1,588	61	8,212	3,415	3,629	15,256
2020/21 YTD	4,097	876	2,826	1,877	322	9,997	4,493	8,907	23,397
YTD 2021/22 as % of 2020/21	75	135	82	85	19	82	76	41	65
Last 4 wks. as % of same period 2020/21*	101	212	62	40	28	75	109	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 importers¹ of U.S. corn

For the week ending 10/07/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2021/22 current MY	2020/21 last MY		
	1,000 mt -			
Mexico	7,076	4,883	45	14,817
Japan	1,952	3,460	(44)	11,082
China	11,920	10,116	18	7,920
Columbia	1,091	1,178	(7)	4,491
Korea	72	339	(79)	3,302
Top 5 importers	22,110	19,974	11	41,613
Total U.S. corn export sales	27,621	26,503	4	53,145
% of projected exports	43%	38%		
Change from prior week ²	1,040	655		
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 (carry over 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 importers¹ of U.S. soybeans

For the week ending 10/07/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2018-20
	2021/22 current MY	2020/21 last MY		
				- 1,000 mt -
China	13,079	23,700	(45)	21,666
Mexico	1,957	2,324	(16)	4,754
Egypt	690	684	1	3,093
Indonesia	342	668	(49)	2,325
Japan	644	668	(4)	2,275
Top 5 importers	16,712	28,044	(40)	34,113
Total U.S. soybean export sales	26,390	43,124	(39)	50,758
% of projected exports	46%	70%		
change from prior week ²	1,148	2,577		
Top 5 importers' share of U.S. soybean export sales	63%	65%		67%
USDA forecast, October 2021	56,948	61,717	92	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative 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.

³FAS marketing year ranking reports (carry over 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 importers¹ of all U.S. wheat

For the week ending 10/07/2021	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2018-20
	2021/22 current MY	2020/21 last MY		
				- 1,000 mt -
Mexico	2,112	1,926	10	3,388
Philippines	1,880	2,168	(13)	3,121
Japan	1,179	1,418	(17)	2,567
Korea	746	858	(13)	1,501
Nigeria	1,308	690	90	1,490
China	848	1,538	(45)	1,268
Taiwan	499	675	(26)	1,187
Indonesia	59	608	(90)	1,131
Thailand	319	418	(24)	768
Italy	138	458	(70)	681
Top 10 importers	9,088	10,755	(16)	17,102
Total U.S. wheat export sales	11,976	15,049	(20)	24,617
% of projected exports	50%	56%		
change from prior week ²	568	528		
Top 10 importers' share of U.S. wheat export sales	76%	71%		69%
USDA forecast, October 2021	23,842	27,030	(12)	

¹Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; Marketing year (MY) = Jun 1 - May 31.

²Cumulative 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.

³FAS marketing year final reports (carry over 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 10/14/21	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	50	168	30	12,058	13,050	92	68	66	15,966
Corn	0	0	n/a	12,368	8,255	150	14	8	9,969
Soybeans	1,126	931	121	6,401	6,826	94	89	209	14,028
Total	1,176	1,099	107	30,828	28,132	110	78	112	39,963
Mississippi Gulf									
Wheat	35	138	25	2,661	3,145	85	126	122	3,422
Corn	816	544	150	33,490	23,212	144	103	113	28,781
Soybeans	797	644	124	14,022	22,572	62	51	65	38,013
Total	1,647	1,327	124	50,174	48,928	103	72	86	70,215
Texas Gulf									
Wheat	35	114	30	3,400	3,845	88	72	119	4,248
Corn	0	32	0	503	621	81	344	219	723
Soybeans	217	55	396	928	661	140	104	311	2,098
Total	252	202	125	4,831	5,127	94	89	163	7,068
Interior									
Wheat	5	47	12	2,465	1,707	144	114	82	2,263
Corn	141	250	56	7,713	6,857	112	120	125	8,683
Soybeans	165	114	145	4,562	5,305	86	62	77	7,274
Total	312	411	76	14,740	13,870	106	92	101	18,220
Great Lakes									
Wheat	23	2	n/a	366	684	54	76	43	891
Corn	0	0	n/a	94	54	174	n/a	0	111
Soybeans	55	0	n/a	143	480	30	61	84	1,111
Total	77	2	n/a	603	1,218	50	66	59	2,113
Atlantic									
Wheat	0	2	0	125	30	421	44	89	65
Corn	2	1	n/a	59	33	179	96	90	33
Soybeans	59	58	103	1,209	802	151	50	103	1,870
Total	61	60	102	1,393	865	161	53	101	1,968
U.S. total from ports*									
Wheat	147	470	31	21,074	22,460	94	78	82	26,854
Corn	959	828	116	54,228	39,032	139	99	98	48,301
Soybeans	2,419	1,802	134	27,266	36,646	74	67	103	64,394
Total	3,525	3,100	114	102,568	98,139	105	76	98	139,548

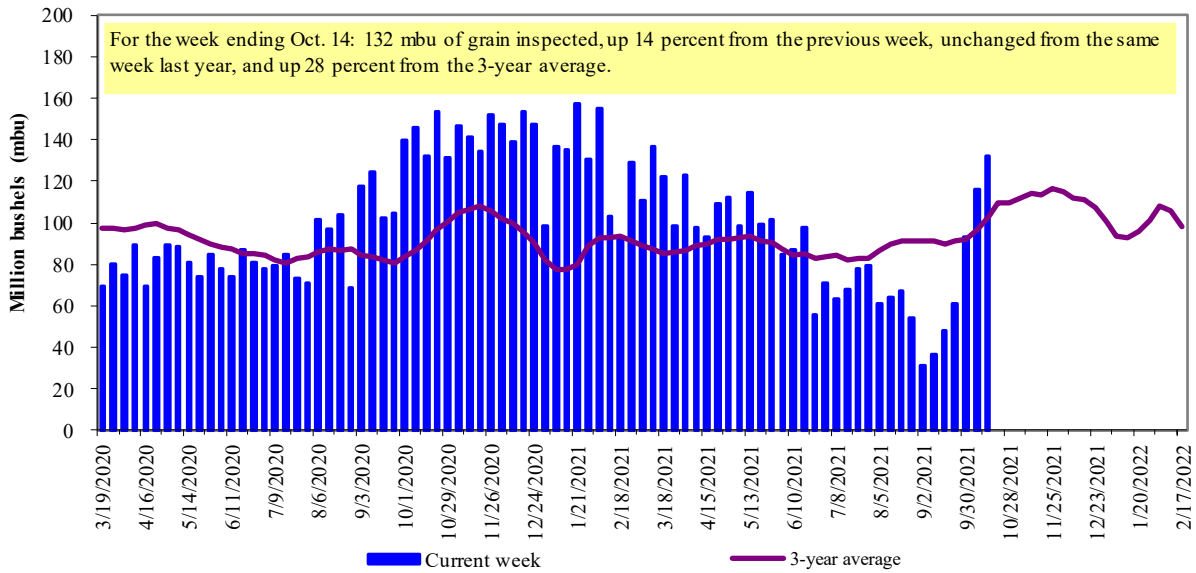
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

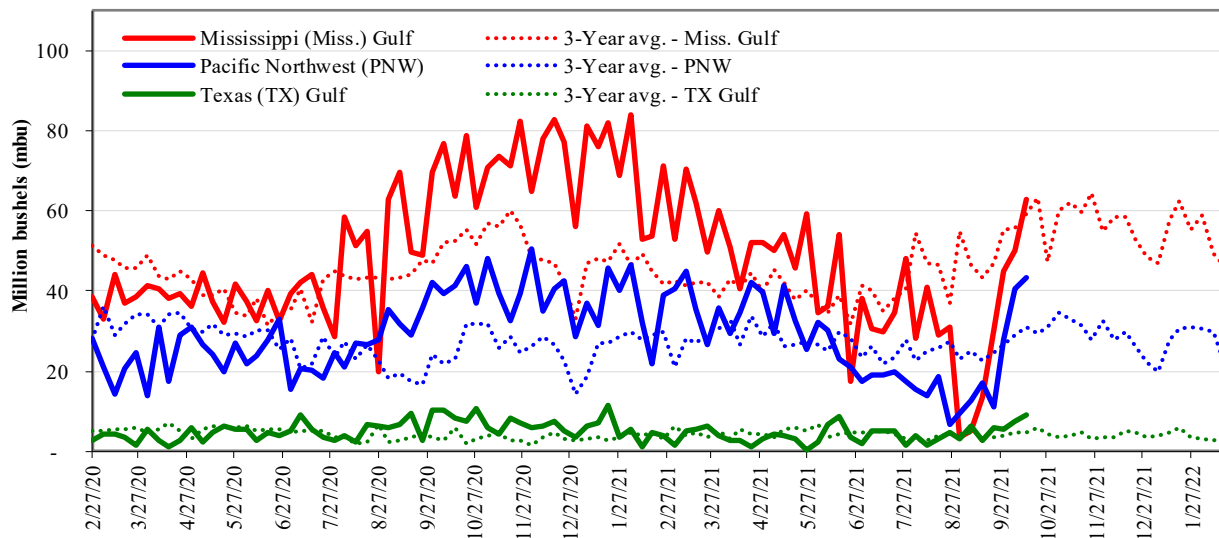


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



Week ending 10/14/21 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 62.7	Last wk:	up 25	up 23	up 25	up 7
PNW: 43.2	Last Year (same wk):	down 1	up 13	unchanged	up 4
TX Gulf: 9.2	3-yr avg. (4-wk. mov. Avg):	up 15	up 117	up 23	up 56

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

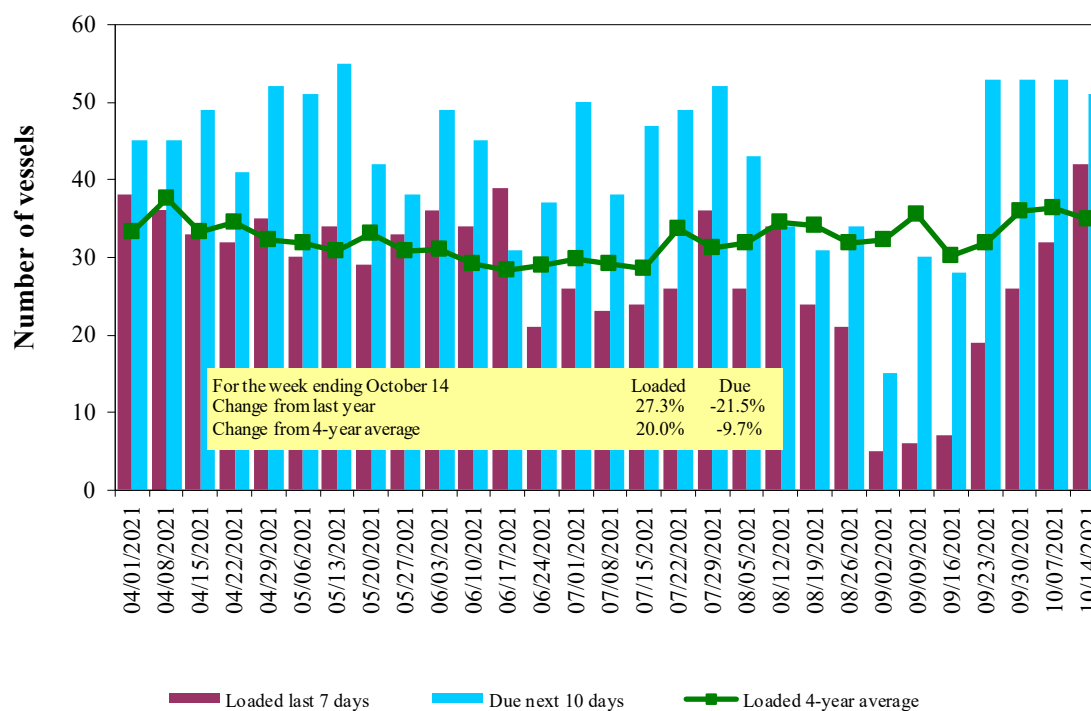
Date	In port	Gulf		Pacific Northwest
		Loaded 7-days	Due next 10-days	In port
10/14/2021	32	42	51	11
10/7/2021	49	32	53	13
2020 range	(22...60)	(23...46)	(34...68)	(7...24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

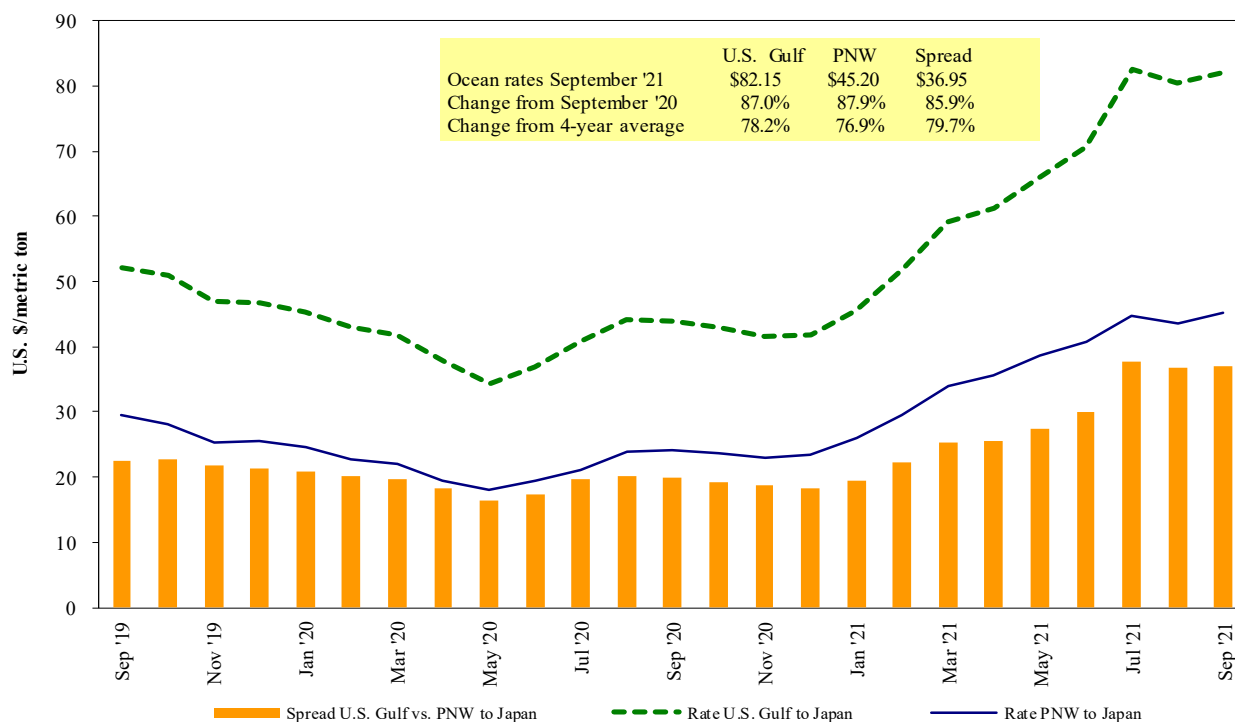
U.S. Gulf¹ vessel loading activity



¹U.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 10/16/2021

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	55,000	65.50
River Plate	South Korea	Corn	Oct 21, 2021	67,000	79.80

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

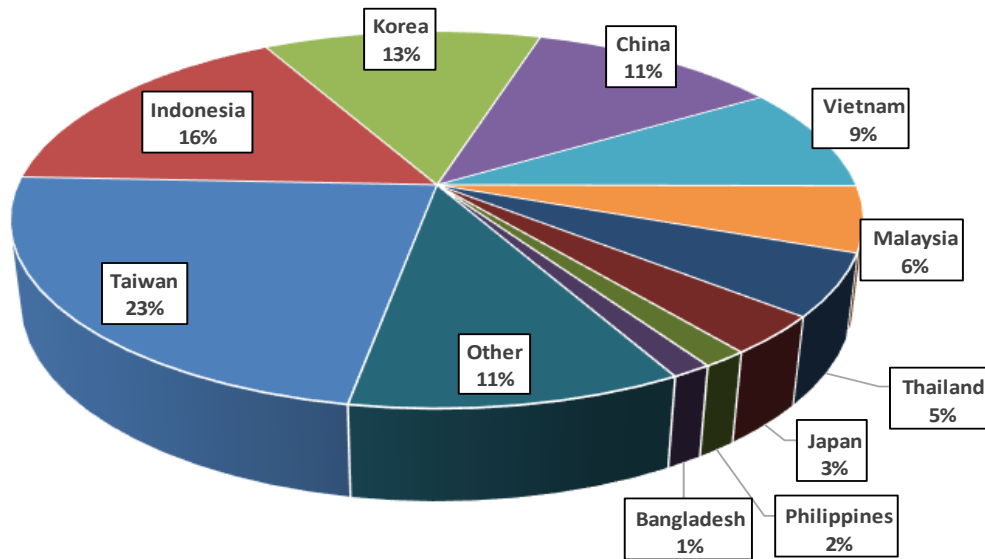
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

op = option.

Source: Maritime Research, Inc.

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

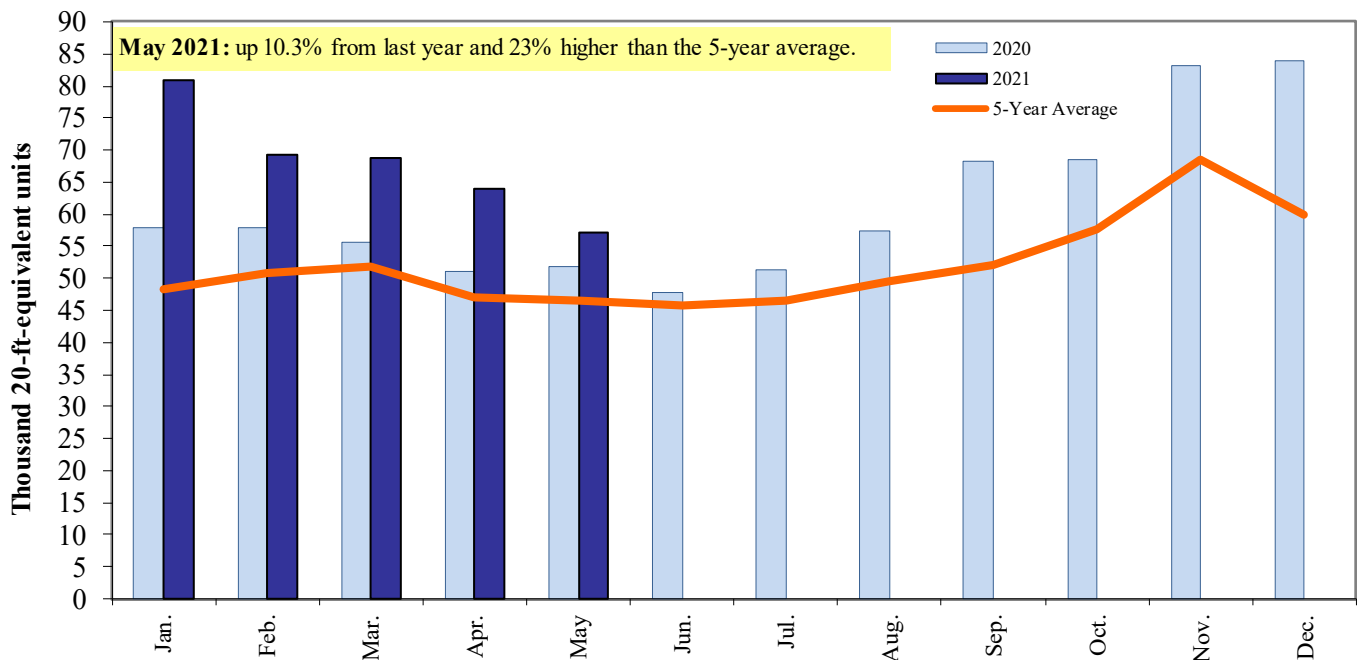
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2021



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 19
Monthly shipments of U.S. containerized grain exports



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

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