USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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July 8, 2021

Contents

The next release is July 15, 2021

WEEKLY HIGHLIGHTS

USDA/NASS Stocks Report Reflects Strong Transportation Demand

On June 30, the USDA's National Agricultural Statistical Service (NASS) released its quarterly *Grain Stocks* report. The report contains both on- and off-farm commercial stocks of selected agricultural commodities at the State and national level as of June 1. Between March 1 and June 1, combined, corn, wheat, and soybean disappearance was 15 percent more than the same timeframe last year. The reported high disappearance corresponded to above average rail carloads (***GTR* fig. 3**) and barge movements (***GTR* fig. 10**). Remaining June 1 grain stocks can influence transportation demand in the coming pre-harvest months. As of June 1, total corn stocks were 4.11 billion bushels, down 18 percent from June 2020. This was the lowest June 1 inventory since 2014. Total U.S. soybean stocks were 767 million bushels (mbu), down 44 percent from the same time in 2020 and the lowest total for June 1 since 2015. Reported total U.S. all-wheat stocks were 844 mbu, 18 percent below 2020 and the lowest level for June 1 since 2015.

FMCSA To Hold Public Meeting of Motor Carrier Safety Advisory Committee Meeting

The Federal Motor Carrier Safety Administration (FMCSA) will hold a meeting of the Motor Carrier Safety Advisory Committee (MCSAC) on Monday and Tuesday, July 19-20, 2021. The committee members—25 industry stakeholders—will hold their meeting via videoconference and open to the public. The agenda will address strategies to improve driver retention, ways to deal with an aging workforce, and potential regulatory changes to lower the current interstate driver age limit of 21—all of which may increase driver availability. The meeting will also address strategies to enhance workforce skills. In an April letter to Congress, the National Grain and Feed Association similarly highlighted the need to promote opportunity and enhanced safety training, especially for new hires, to address "the truck driver shortage." Requests to submit written materials to be reviewed during the meeting must be received by July 9, 2021. Interested public can access the meeting, task statements, a detailed agenda, meeting minutes and additional information on the committee and its activities here.

Mississippi Gulf Grain Inspections Rebound

For the week ending July 1, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 1.7 million metric tons (mmt). Total grain inspections were up 19 percent from the previous week, down 15 percent from last year, and down 22 percent from the 3-year average. The increase was driven by a 102-percent rebound in Mississippi Gulf grain inspections, as well as a 20-percent increase in corn inspections and an 87-percent jump in soybean inspections. Year-to-date inspections are up 31 percent from the same time last year. However, inspections of grain in the Pacific Northwest (PNW) decreased 24 percent from the previous week.

Snapshots by Sector

Export Sales

For the week ending June 24, **unshipped balances** of wheat, corn, and soybeans totaled 21.0 mmt. This was 3 percent lower than last week and 5 percent lower than the same time last year. Net **corn export sales** were 0.015 mmt, down 93 percent from the past week. Net **soybean export sales** were 0.093 mmt, down 35 percent from the previous week. Net weekly **wheat export sales** for marketing year 2021/22, which began June 1, were 0.226 mmt.

Rail

U.S. Class I railroads originated 21,975 **grain carloads** during the week ending June 26. This was a 12-percent increase from the previous week, 14 percent more than last year, and 3 percent more than the 3-year average.

Average July shuttle **secondary railcar** bids/offers (per car) were $308 below tariff for the week ending July 1. This was $49 less than last week and $345 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending July 3, **barged grain movements** totaled 771,472 tons. This was 11 percent less than the previous week and 2.4 percent higher than the same period last year.

For the week ending July 3, 511 grain barges **moved down river**—36 more barges than the previous week. There were 559 grain barges **unloaded in New Orleans**, 32 percent more than the previous week.

Ocean

For the week ending July 1, 26 **oceangoing grain vessels** were loaded in the Gulf—21 percent fewer than the same period last year. Within the next 10 days (starting July 2), 50 vessels were expected to be loaded—19 percent more than the same period last year.

As of July 1, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $82.00. This was 9 percent more than the previous week. The rate from PNW to Japan was $46.00 per mt, 7 percent more than the previous week.

Fuel

For the week ending July 5, the U.S. average **diesel fuel price** increased 3.1 cents from the previous week to $3.331 per gallon, 89.4 cents above the same week last year. This is the 10th consecutive week that the national average diesel price has increased.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* July 8, 2021.
Web: **http://dx.doi.org/10.9752/TS056.07-08-2021**

Feature Article/Calendar

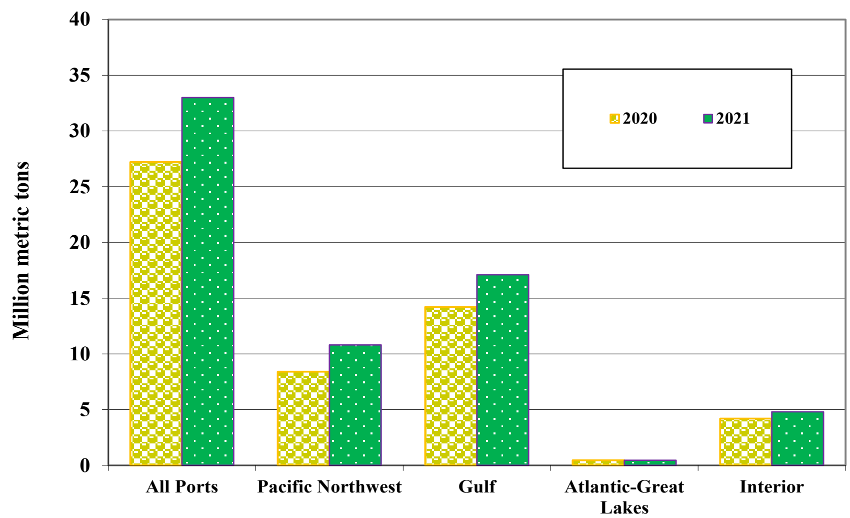
Second-Quarter Grain Inspections Highest Since 2018; Corn Reached Record High

During second quarter 2021, inspections of wheat, corn, and soybeans for export from all major U.S. ports totaled 33.2 million metric tons (mmt), according to USDA's Federal Grain Inspection Service (FGIS). The amount of grain inspected was up 22 percent from second quarter 2020 (year to year) (fig. 1) and up 15 percent from the 5-year average. Inspections of grain were up in each of the three major U.S. port regions. In June, USDA estimated the total year to year change from MY 2019/20 to MY 2020/21 for corn, soybeans, and wheat exports to be up 60, 36, and 2 percent, respectively.

Grain Inspections by Region

In second quarter 2021, Pacific Northwest (PNW) grain inspections totaled 10.8 mmt, up 28 percent from year to year and up 16 percent from the 5-year average. Second-quarter rail deliveries of grain to PNW ports were up 5 percent year to year. In the U.S. Gulf—mainly reflecting record-high corn inspections—inspections of grain reached a record 17.1 mmt. This was up 21 percent year to year and up 18 percent from the 5-year average. Rail deliveries of grain to Mississippi Gulf ports increased 20 percent year to year. At .465 mmt, grain inspections in the Atlantic-Great Lakes were down slightly year to year and down 41 percent from the 5-year average.

Figure 1: Second quarter grain inspections by port region



Source: USDA, Federal Grain Inspection Service

Interior (primarily land-based) grain inspections were 4.8 mmt, up 15 percent from year to year and up 16 percent from the 5-year average. Corn and soybean inspections in the Interior remained strong during second quarter 2021. Of total Interior inspections, corn inspections represented 56 percent and soybean inspections represented 27 percent.

Corn Inspections Reach Record High

Second-quarter corn inspections reached a record 23 mmt, up 52 percent year to year (fig. 2) and up 46 percent from the 5-year average. The jump in corn inspections was due primarily to steady demand from Asia and Latin America. PNW corn inspections reached 6.6 mmt, up 70 percent year to year and up 45 percent from the 5-year average. At 13.6 mmt, U.S. Gulf inspections of corn increased 51 percent year to year and increased 56 percent from the 5-year average. Corn inspections in the Interior reached 2.37 mmt, up 19 percent year to year and up 18 percent from the 5-year average. Corn inspections in the Atlantic-Great Lakes rebounded to more than 350 percent of last year's total.

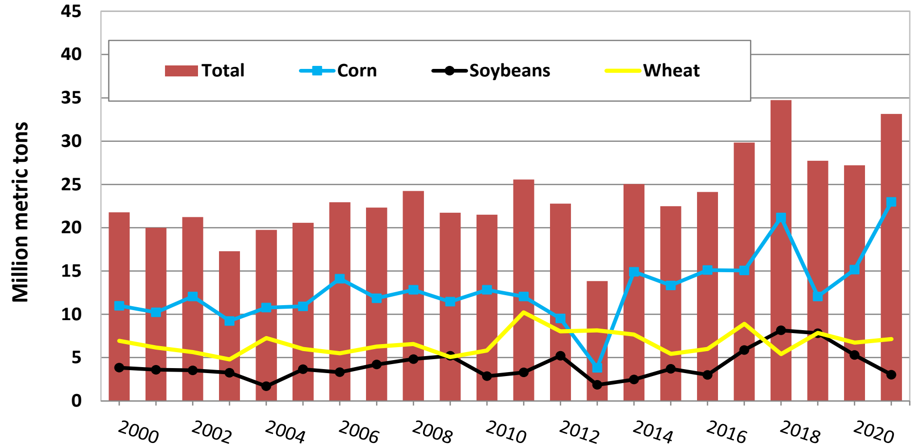
Soybean Inspections Fall

Although second-quarter soybean inspections destined to China and other parts of Asia were up significantly from last year, these increases could not offset the drop in soybean exports to other places.

At 3 mmt in second quarter 2021, soybean inspections were down 43 percent year to year and down 50 percent from the 5-year average (fig. 2). The large drop in soybean inspections was due mainly to lower shipments to Africa and Europe.

During the second quarter, PNW soybean inspections reached .055 mmt, the second-lowest level on record and down 91 percent from year to year. PNW soybean inspections were 94 percent below the 5-year average. At 1.4 mmt, second-quarter U.S. Gulf soybean inspections decreased 55 percent year to year and fell 56 percent from the 5-year average. At 1.3 mmt, Interior (land-based) inspections of soybeans were down 2 percent year to year and down 4 percent from the 5-year average.

Figure 2: Second quarter grain inspections by grain type



Source: USDA, Federal Grain Inspection Service

Wheat Inspections Decrease

Second-quarter wheat inspections reached 7.1 mmt, up 6 percent year to year and up 2 percent from the 5-year average (fig. 2). At 4.1 mmt, wheat inspections in PNW were up 4 percent year to year and up 9 percent from the 5-year average. PNW second-quarter wheat inspections were also the third highest on record. Total wheat inspections in the U.S. Gulf increased 6 percent year to year, but were down 18 percent from the 5-year average. Atlantic-Great Lakes wheat inspections totaled .202 mmt, down 30 percent from year to year. Interior wheat inspections reached a record high at .719 mmt, up 42 percent year to year and 74 percent above the 5-year average, due primarily to increased shipments to Mexico.

Market Outlook

USDA's June *World Agricultural Supply and Demand Estimates (WASDE)* projected corn exports in MY 2021/22 to reach 62.3 mmt, which would be a 14-percent decline in corn exports from the MY 2020/21 total. In the same report, USDA projected soybean exports in MY 2021/22 to reach 56.5 mmt, which would be a 9 percent decline from the MY 2020/21 total. USDA also projected MY 2021/22 wheat exports to reach 24.5 mmt, 9 percent below the MY 2020/2021 total. All three projections were unchanged from the same projections in the May *WASDE* report.

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Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

For the week ending	Truck	Rail: Non-Shuttle	Rail: Shuttle	Barge	Ocean: Gulf	Ocean: Pacific
07/07/21	224	292	212	153	367	326
06/30/21	221	291	214	156	335	305

[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.

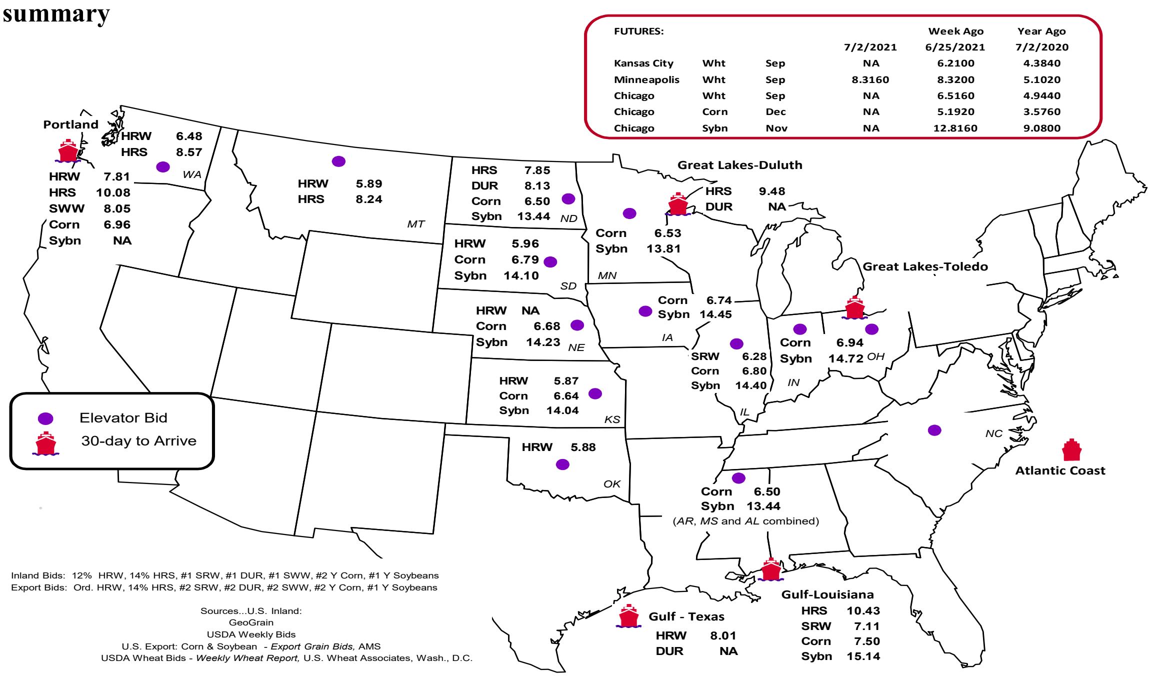
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	7/2/2021	6/25/2021
Corn	IL–Gulf	-0.70	-0.75
Corn	NE–Gulf	-0.82	-0.96
Soybean	IA–Gulf	-0.69	-0.71
HRW	KS–Gulf	-2.14	-2.07
HRS	ND–Portland	-2.23	-2.08

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]
6/30/2021[p]	355	1,008	3,696	0	5,059	6/26/2021	2,916
6/23/2021[r]	546	784	4,657	0	5,987	6/19/2021	3,544
2021 YTD[r]	34,972	39,106	164,760	9,887	248,725	2021 YTD	72,529
2020 YTD[r]	10,630	22,267	122,152	5,069	160,118	2020 YTD	61,619
2021 YTD as % of 2020 YTD	329	176	135	195	155	% change YTD	118
Last 4 weeks as % of 2020[2]	236	87	90	0	91	Last 4wks. % 2020	136
Last 4 weeks as % of 4-year avg.[2]	80	91	81	0	80	Last 4wks. % 4 yr.	119
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.

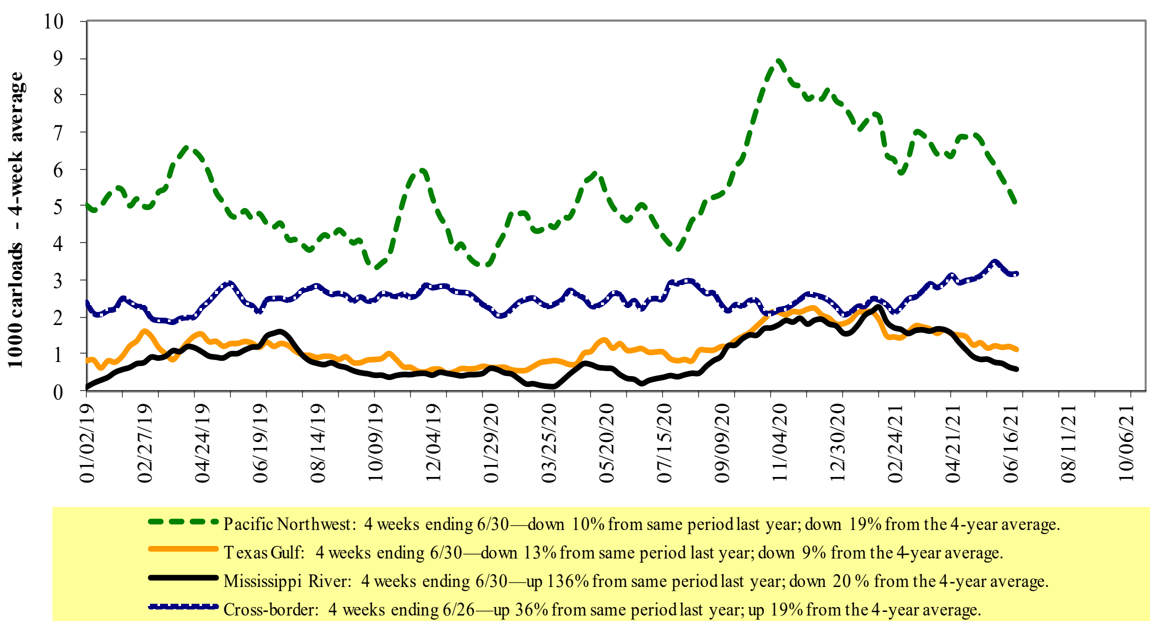
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 6/26/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,646	2,427	10,554	1,538	5,810	21,975	3,608	5,248
This week last year	1,402	2,637	9,436	1,017	4,724	19,216	4,707	5,609
2021 YTD	48,693	64,995	318,068	28,075	162,273	622,104	115,639	133,868
2020 YTD	43,322	60,581	277,938	26,975	128,580	537,396	102,675	115,734
2021 YTD as % of 2020 YTD	112	107	114	104	126	116	113	116
Last 4 weeks as % of 2020*	116	103	98	136	113	105	84	98
Last 4 weeks as % of 3-yr. avg.**	103	95	91	130	113	99	89	101
Total 2020	91,659	130,434	613,630	57,782	296,701	1,190,206	238,670	261,778

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

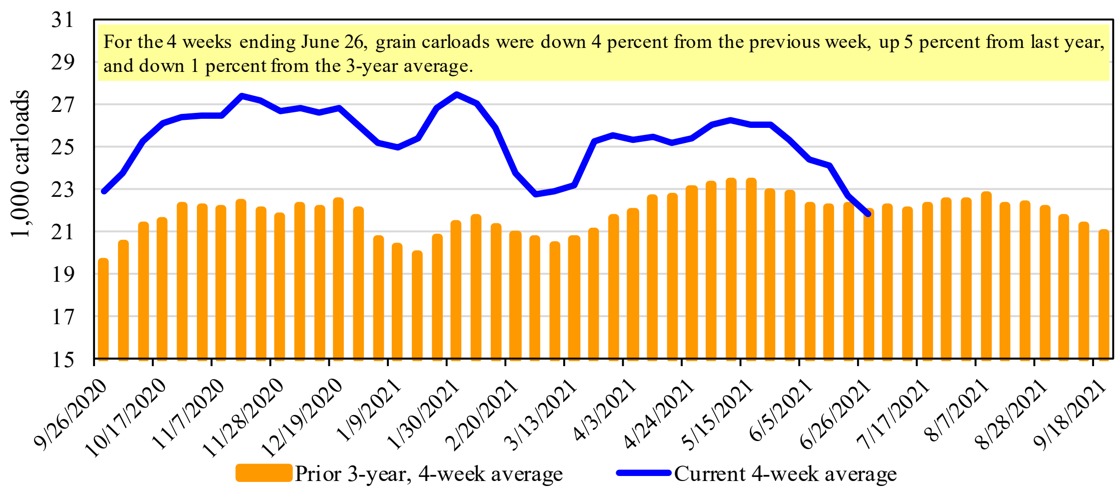
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 7/1/2021		Jul-21	Jul-20	Aug-21	Aug-20	Sep-21	Sep-20	Oct-21	Oct-20
		Delivery period							
BNSF[3]	COT grain units	183	no bids	0	0	no bids	no bids	no bids	no bids
	COT grain single-car	11	0	0	0	0	0	0	0
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no bid	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.

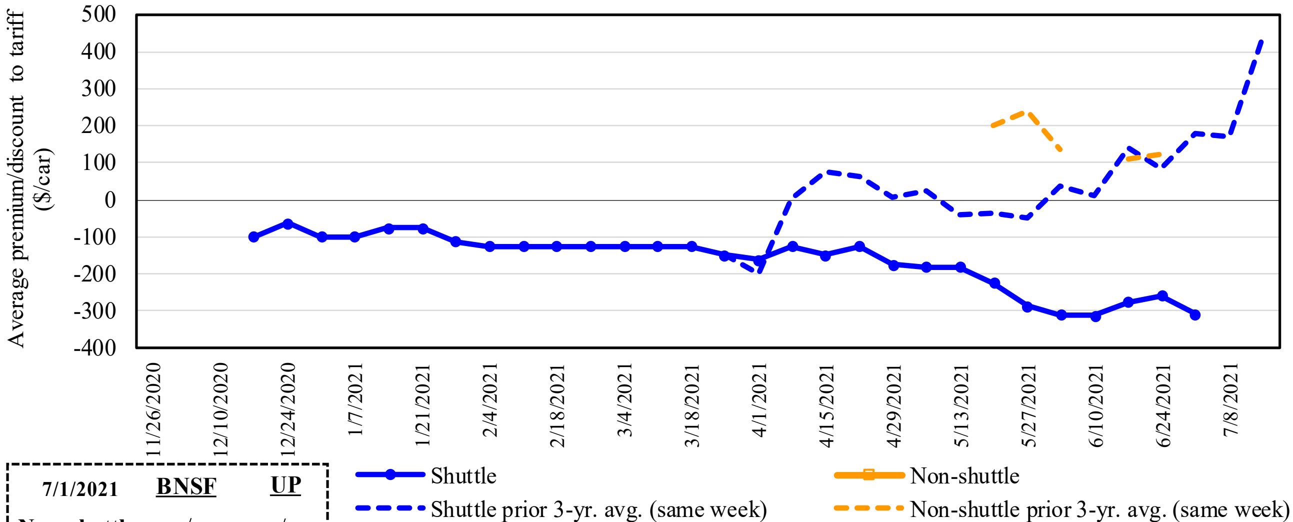
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 July 2021, secondary market

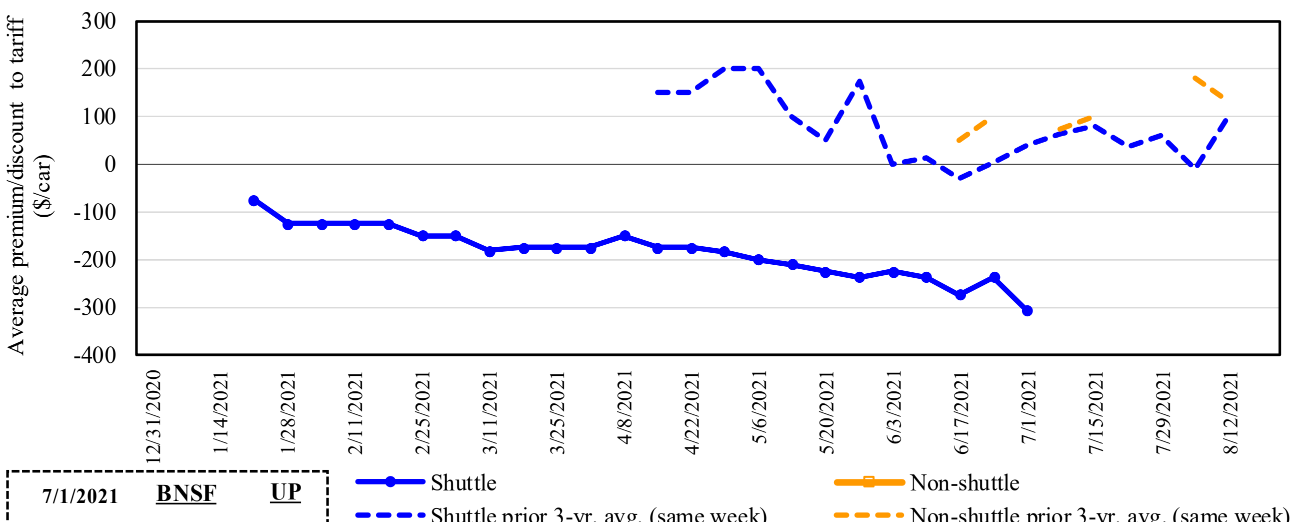


7/1/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$266	-$350

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $49 this week and are $245 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



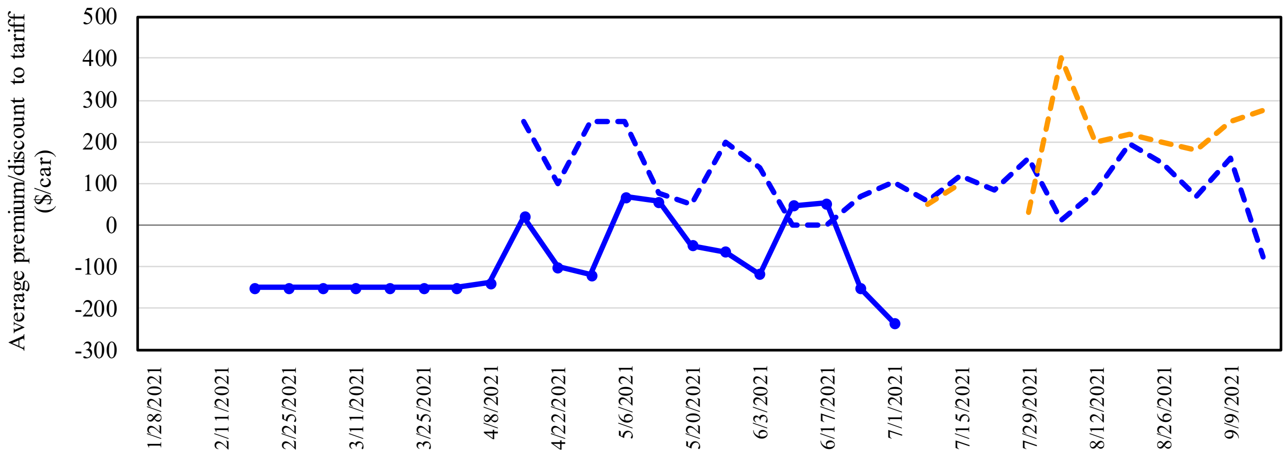
7/1/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$363	-$250

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $69 this week and are $231 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



7/1/2021	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 $81 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: 7/1/2021		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**	**(266)**	**(363)**	**(267)**	**742**	**n/a**	**n/a**
	Change from last week	(16)	(113)	(175)	(2)	n/a	n/a
	Change from same week 2020	(241)	(313)	(292)	142	n/a	n/a
	UP-Pool	**(350)**	**(250)**	**(200)**	**667**	**n/a**	**n/a**
	Change from last week	(83)	(25)	13	(71)	n/a	n/a
	Change from same week 2020	(450)	(263)	(169)	317	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.

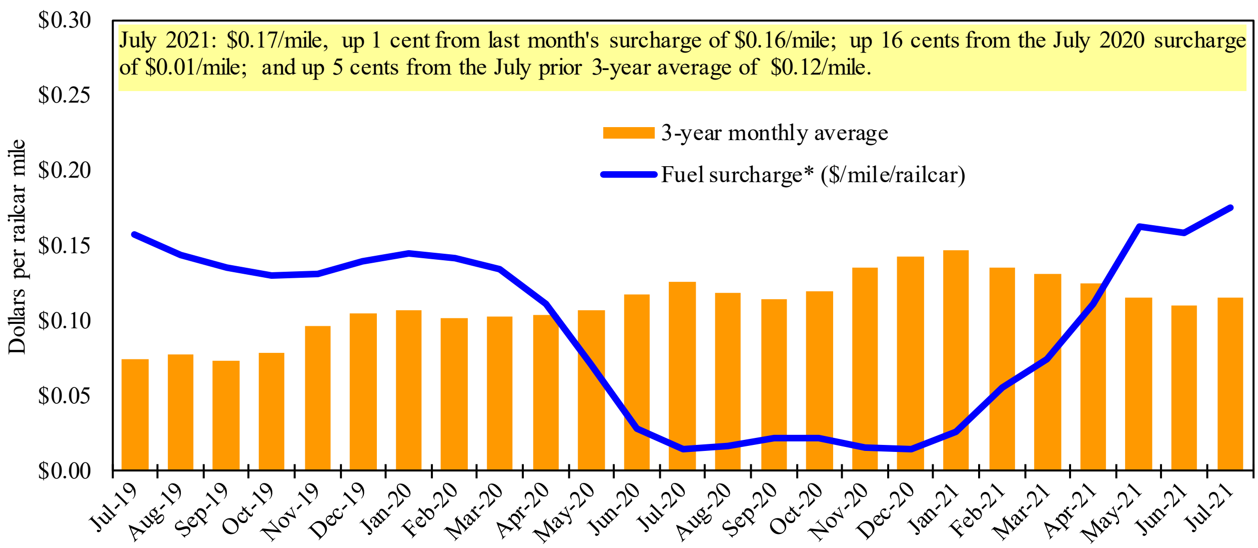
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[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

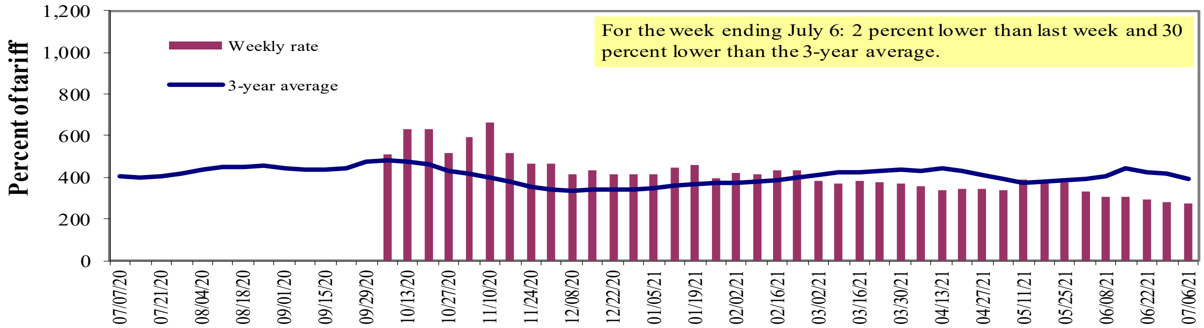
Railroad fuel surcharges, North American weighted average[1]



[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.
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]	7/6/2021	358	275	275	199	214	214	186
	6/29/2021	393	284	281	200	214	214	196
$/ton	7/6/2021	22.16	14.63	12.76	7.94	10.04	8.65	5.84
	6/29/2021	24.33	15.11	13.04	7.98	10.04	8.65	6.15
Current week % change from the same week:								
	Last year	-5	-7	-	4	13	13	2
	3-year avg. [2]	-19	-31	-30	-27	-21	-21	-25
Rate[1]	August	388	309	307	244	268	268	234
	October	573	543	541	446	536	536	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.
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

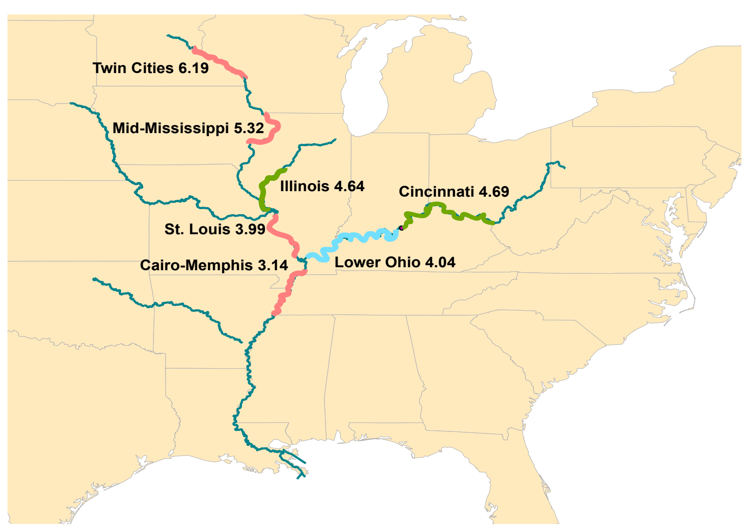
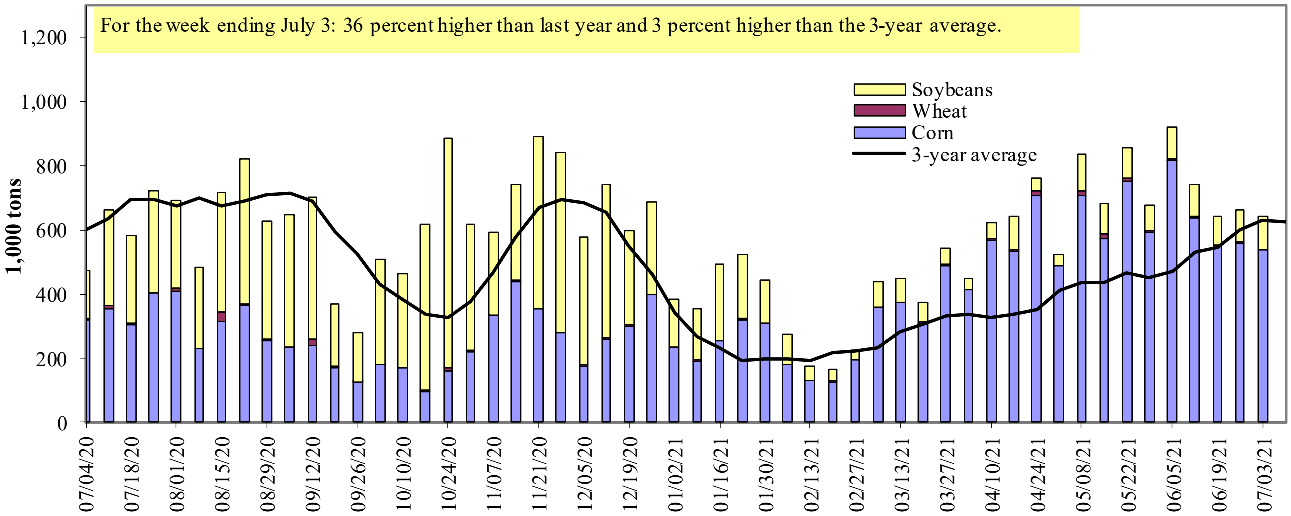


Figure 10

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 07/03/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	286	3	40	0	329
Winfield, MO (L25)	369	2	71	0	442
Alton, IL (L26)	489	0	92	0	581
Granite City, IL (L27)	538	0	106	0	644
Illinois River (La Grange)	0	0	0	0	0
Ohio River (Olmsted)	58	23	14	0	95
Arkansas River (L1)	0	28	4	0	32
Weekly total - 2021	596	51	124	0	771
Weekly total - 2020	471	30	358	10	869
2021 YTD[1]	16,055	709	4,513	191	21,468
2020 YTD[1]	9,480	853	6,013	90	16,437
2021 as % of 2020 YTD	169	83	75	212	131
Last 4 weeks as % of 2020[2]	121	58	41	57	88
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.

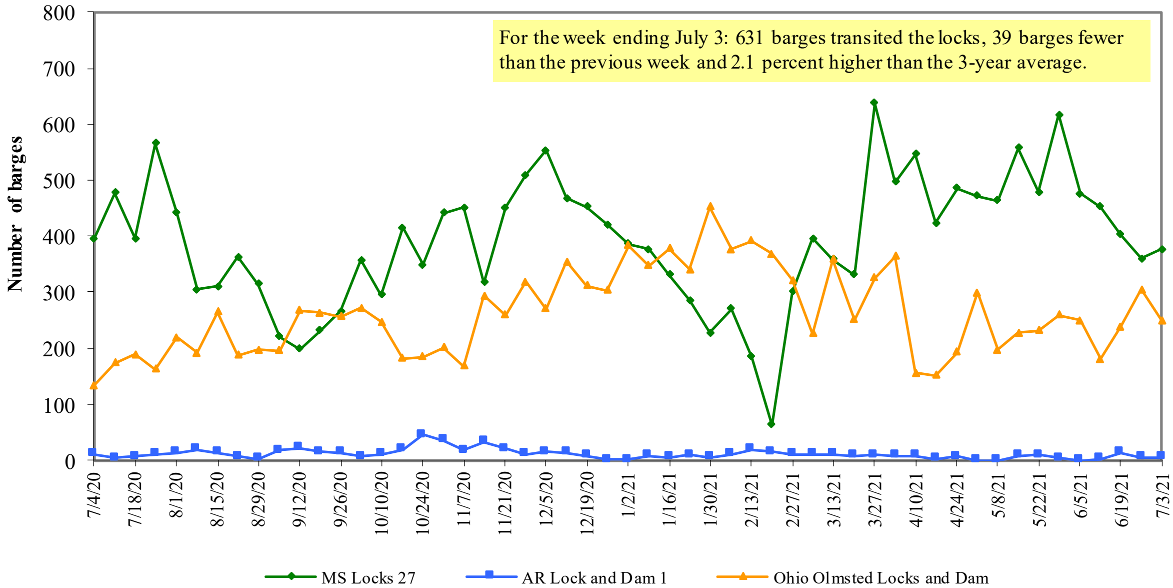
[2] As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

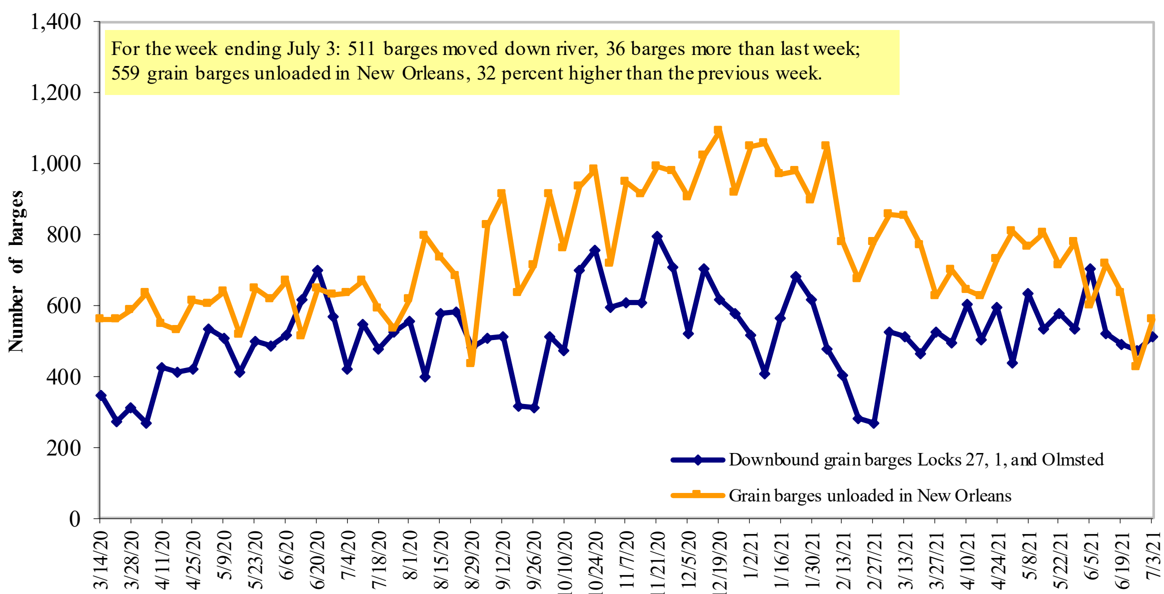
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 7/5/2021 (U.S. $/gallon)

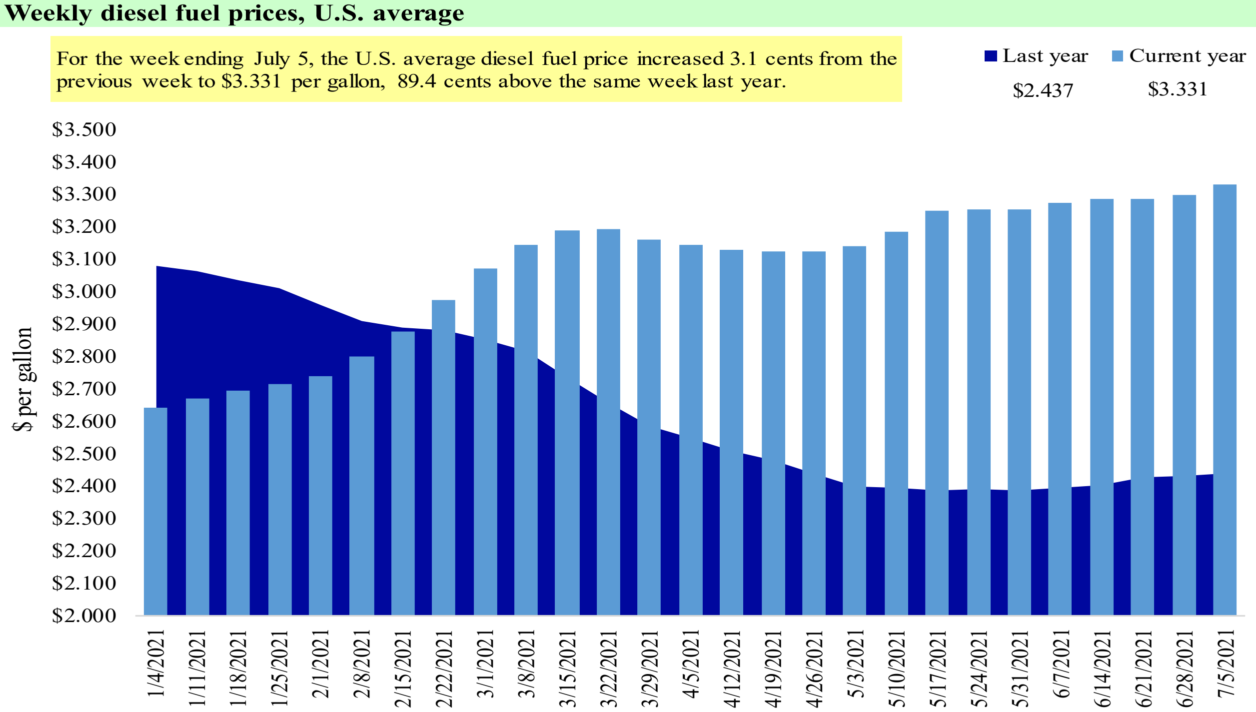
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.306	0.016	0.779
	New England	3.242	0.004	0.590
	Central Atlantic	3.475	0.024	0.779
	Lower Atlantic	3.204	0.013	0.816
II	Midwest	3.264	0.025	0.958
III	Gulf Coast	3.076	0.032	0.872
IV	Rocky Mountain	3.516	0.083	1.171
V	West Coast	3.896	0.057	0.936
	West Coast less California	3.550	0.056	0.954
	California	4.185	0.058	0.925
Total	United States	3.331	0.031	0.894

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

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

Figure 13

Weekly diesel fuel prices, U.S. average



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

Grain Exports

Table 12

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

For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
	Wheat								
Export balances [1]									
6/24/2021	1,549	1,040	1,563	1,078	8	5,238	12,148	3,568	20,954
This week year ago	1,933	511	1,621	1,099	225	5,389	8,431	7,745	21,565
Cumulative exports-marketing year [2]									
2020/21 YTD	519	32	353	231	26	1,162	57,400	58,273	116,834
2019/20 YTD	839	68	464	319	85	1,775	33,883	37,077	72,735
YTD 2020/21 as % of 2019/20	62	47	76	72	31	65	169	157	161
Last 4 wks. as % of same period 2019/20*	82	200	98	99	7	98	168	48	107
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 06/24/2021	Total commitments[2] 2021/22 next MY	2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
			- 1,000 mt -		
Mexico	1,947	14,880	14,156	5	14,869
Japan	825	10,584	9,602	10	11,221
Columbia	0	3,846	4,270	(10)	4,830
Korea	0	3,526	2,569	37	4,011
China	10,744	23,332	1,355	1,622	909
Top 5 importers	**13,516**	**56,169**	**31,953**	**76**	**35,840**
Total U.S. corn export sales	**15,748**	**69,547**	**42,314**	**64**	**49,983**
% of projected exports	25%	96%	94%		
Change from prior week[2]	**68**	**15**	**361**		
Top 5 importers' share of U.S. corn export sales	86%	81%	76%		72%
USDA forecast June 2021	**62,341**	**72,519**	**45,242**	**60**	
Corn use for ethanol USDA forecast, June 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 06/24/2021	Total commitments[2] 2021/22 next MY	2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
			1,000 mt -		- 1,000 mt -
China	4,130	35,809	15,775	127	19,106
Mexico	563	4,747	4,619	3	4,591
Egypt	0	2,777	3,487	(20)	2,980
Indonesia	10	2,256	1,932	17	2,360
Japan	74	2,276	2,367	(4)	2,288
Top 5 importers	**4,778**	**47,864**	**28,180**	**70**	**31,324**
Total U.S. soybean export sales	**9,279**	**61,841**	**44,822**	**38**	**49,352**
% of projected exports	16%	100%	98%		
change from prior week[2]	**1,670**	**93**	**242**		
Top 5 importers' share of U.S. soybean export sales	51%	77%	63%		**63%**
USDA forecast, June 2021	**56,540**	**62,125**	**45,831**	**136**	

[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 06/24/2021	Total Commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
		1,000 mt -		- 1,000 mt -
Mexico	1,032	583	77	3,388
Philippines	881	1,046	(16)	3,121
Japan	753	737	2	2,567
Korea	366	549	(33)	1,501
Nigeria	537	393	37	1,490
China	270	561	(52)	1,268
Taiwan	184	353	(48)	1,187
Indonesia	62	188	(67)	1,131
Thailand	121	174	(31)	768
Italy	39	205	(81)	681
Top 10 importers	**4,243**	**4,788**	(11)	**17,102**
Total U.S. wheat export sales	**6,400**	**7,164**	(11)	**24,617**
% of projected exports	26%	27%		
change from prior week[2]	**226**	**382**		
Top 10 importers' share of U.S. wheat export sales	66%	67%		69%
USDA forecast, June 2021	**24,523**	**26,839**	(9)	

[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 07/01/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	89	110	81	8,125	8,130	100	59	67	15,966
Corn	320	427	75	11,079	5,475	202	118	120	9,969
Soybeans	3	4	69	3,758	2,747	137	65	2	14,028
Total	**413**	**541**	**76**	**22,961**	**16,352**	**140**	**89**	**84**	**39,963**
Mississippi Gulf									
Wheat	51	38	133	1,237	1,931	64	45	54	3,422
Corn	726	396	183	25,947	15,540	167	139	151	28,781
Soybeans	130	15	878	10,347	10,873	95	29	23	38,013
Total	**907**	**449**	**202**	**37,531**	**28,343**	**132**	**97**	**96**	**70,215**
Texas Gulf									
Wheat	49	96	51	2,028	2,188	93	133	129	4,248
Corn	0	0	n/a	271	428	63	58	61	723
Soybeans	0	0	n/a	656	7	n/a	n/a	0	2,098
Total	**49**	**96**	**51**	**2,955**	**2,623**	**113**	**124**	**116**	**7,068**
Interior									
Wheat	83	60	140	1,441	1,180	122	110	147	2,263
Corn	167	185	90	4,911	4,318	114	102	104	8,683
Soybeans	81	91	89	3,232	3,331	97	71	60	7,274
Total	**331**	**335**	**99**	**9,583**	**8,828**	**109**	**93**	**92**	**18,220**
Great Lakes									
Wheat	0	0	n/a	229	321	71	49	59	891
Corn	0	7	0	39	0	n/a	n/a	21	111
Soybeans	0	0	n/a	26	61	42	29	13	1,111
Total	**0**	**7**	**0**	**293**	**382**	**77**	**48**	**30**	**2,113**
Atlantic									
Wheat	0	0	n/a	74	5	n/a	n/a	n/a	65
Corn	0	0	n/a	14	8	174	n/a	0	33
Soybeans	3	7	50	1,052	413	255	94	21	1,870
Total	**3**	**7**	**50**	**1,140**	**426**	**267**	**104**	**22**	**1,968**
U.S. total from ports*									
Wheat	272	304	90	13,133	13,755	95	73	83	26,854
Corn	1,214	1,016	120	42,260	25,769	164	126	131	48,301
Soybeans	217	116	187	19,070	17,430	109	41	27	64,394
Total	**1,703**	**1,436**	**119**	**74,463**	**56,955**	**131**	**95**	**90**	**139,548**

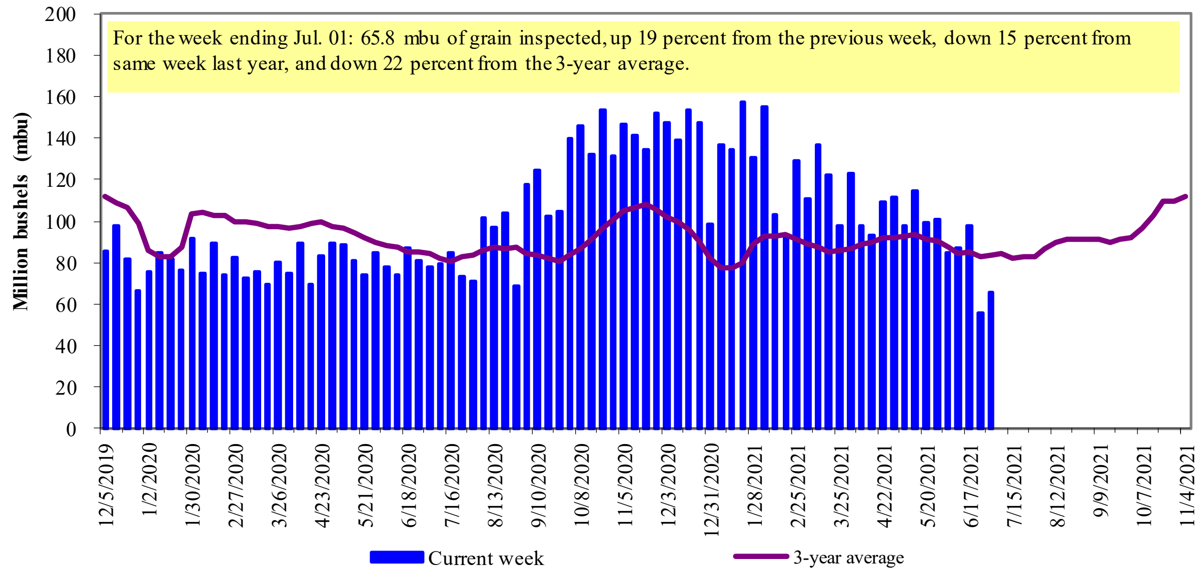
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

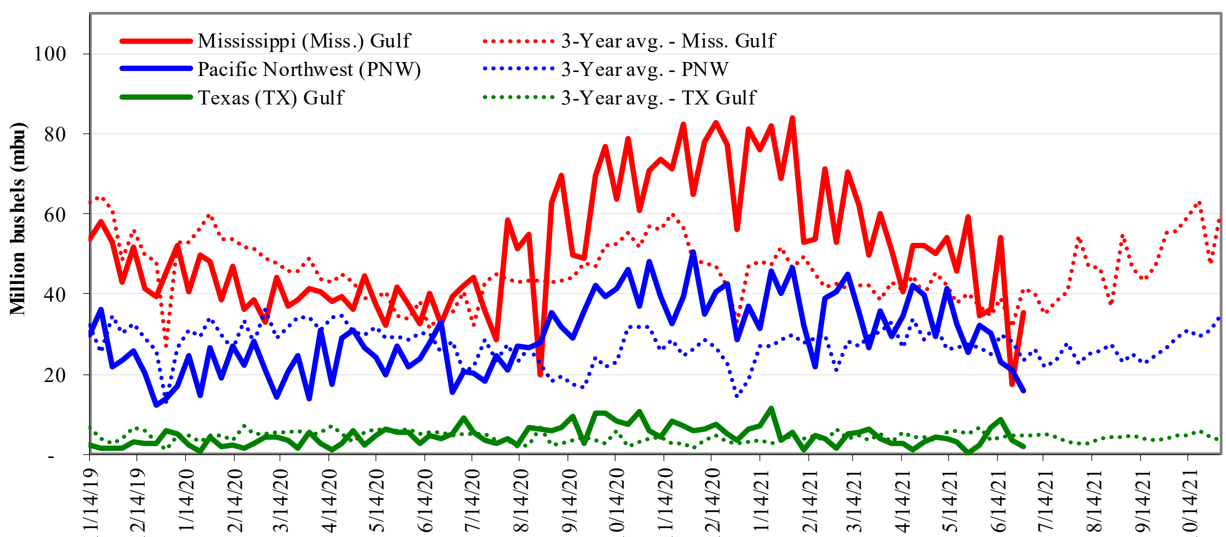


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 07/01/21 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	35.2	Last wk:	up 101	down 49	up 76	down 24
PNW:	16.0	Last Year (same wk):	down 10	down 64	down 16	up 3
TX Gulf:	1.8	3-yr avg. (4-wk. mov. Avg):	down 4	down 59	down 10	down 40

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

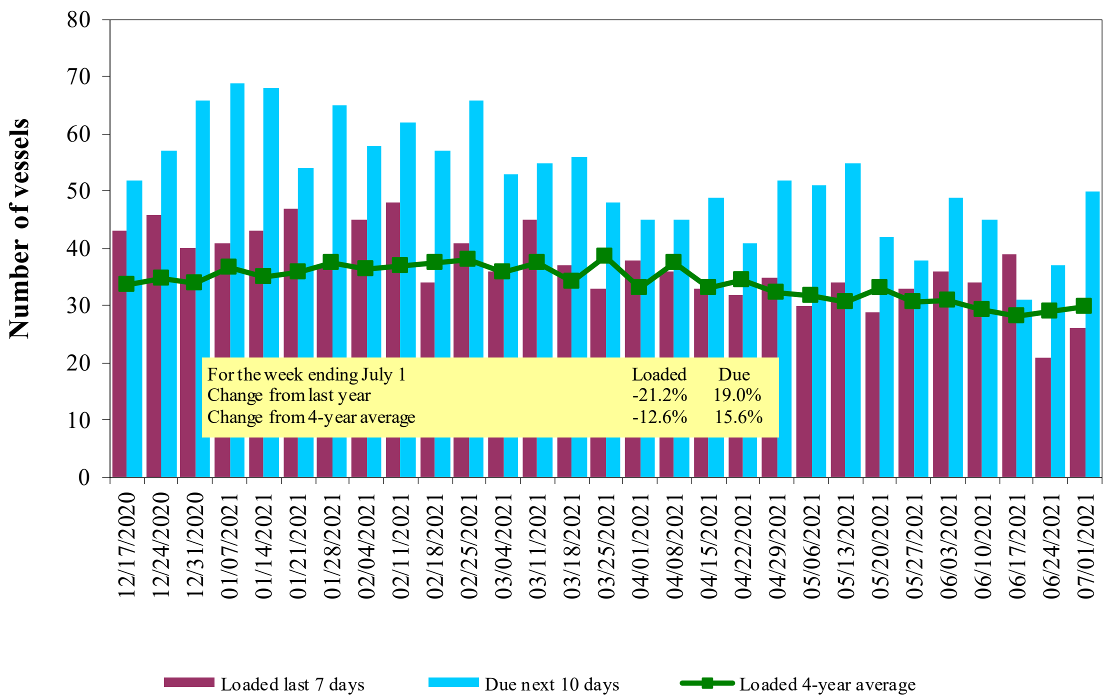
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
7/1/2021	11	26	50	7
6/24/2021	18	21	37	5
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

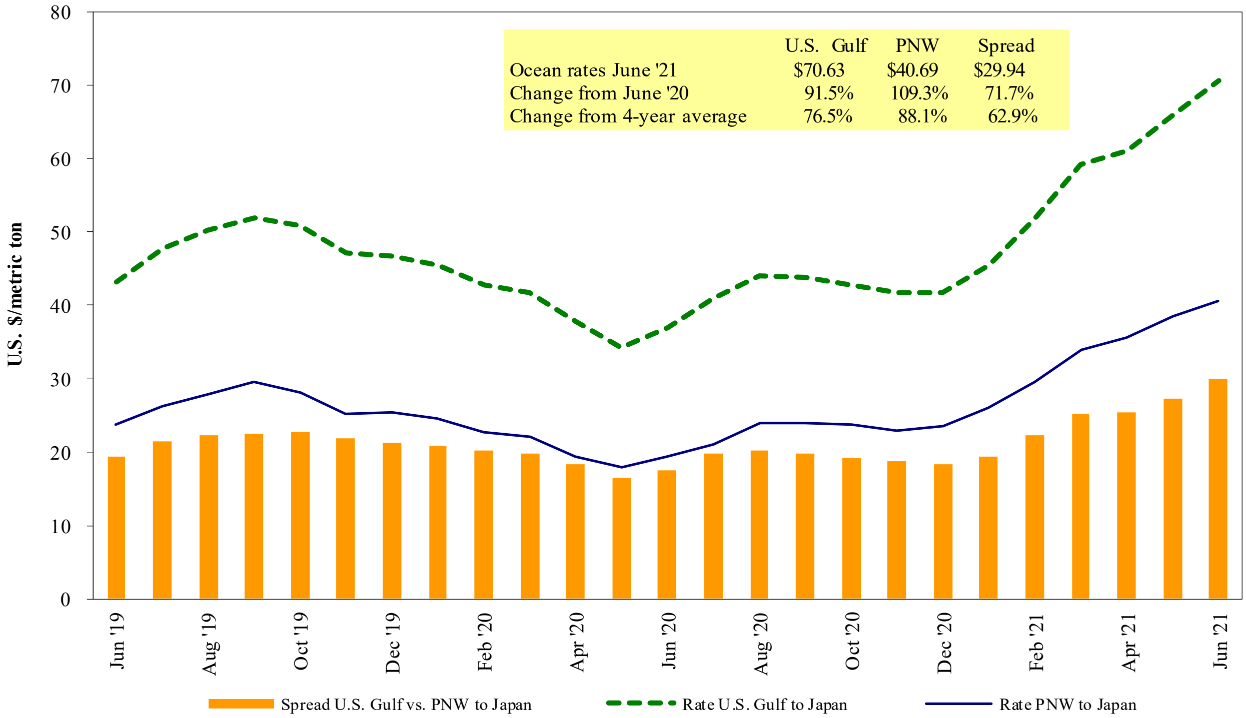
U.S. Gulf[1] vessel loading activity



[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 07/03/2021

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.

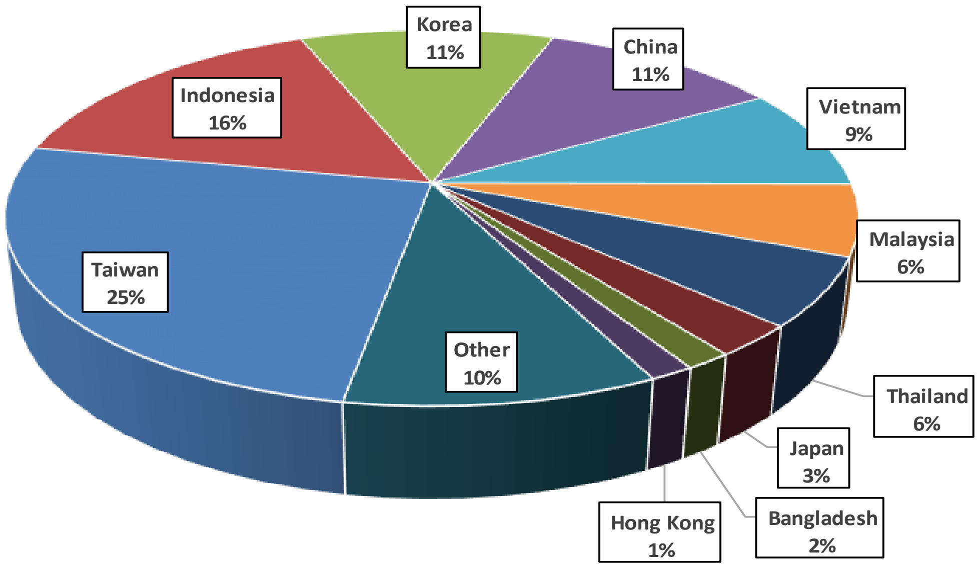
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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

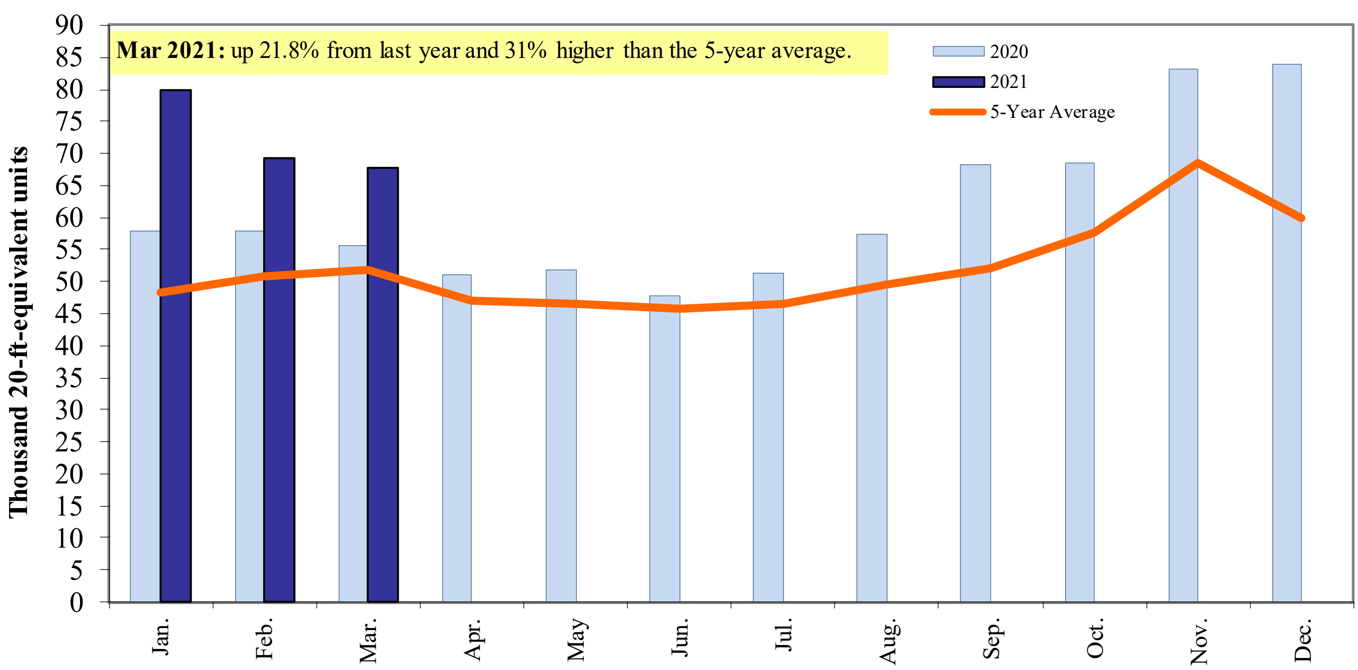


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

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.

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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* July 8, 2021. Web: **http://dx.doi.org/10.9752/TS056.07-08-2021**