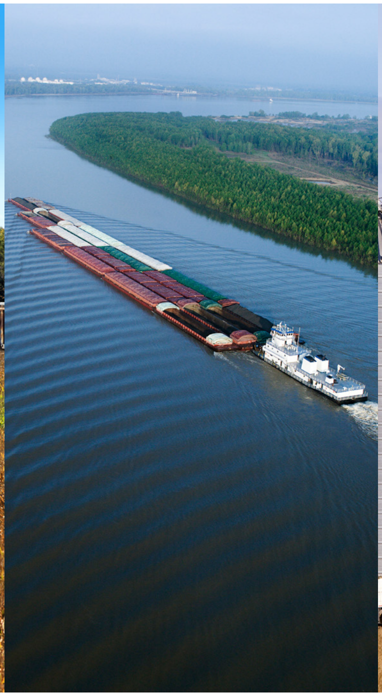
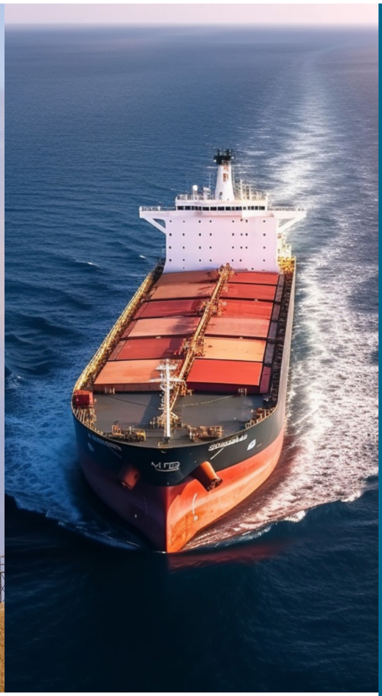
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



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Grain Transportation Report

January 11, 2024
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www.ams.usda.gov/GTR

Port of Duluth-Superior Finishes Longest Navigation Season on Record. On December 29, the *Nordika Desgagnes* left the Port of Duluth-Superior with a cargo of beet pulp pellets destined for Ireland. The ship's exit marked the port's latest winter-time departure on record, completing Duluth-Superior's longest-ever navigation season for international traffic—spanning 277 days.

The St. Lawrence Seaway officially closed on January 5, 2024—the latest closing date since the Seaway opened in 1959. The lengthened season is aided by the Great Lakes being nearly ice-free: on January 1, less than 1 percent of the Great Lakes were covered by ice, compared to the historical average of nearly 10 percent at this time of year.

Despite the extension of the shipping season by mild weather, grain inspections from the Great Lakes were nearly one-third lower in 2023 than in 2022—driven by significant drops in corn and soybean exports. For the latest grain inspections data, see table 16.

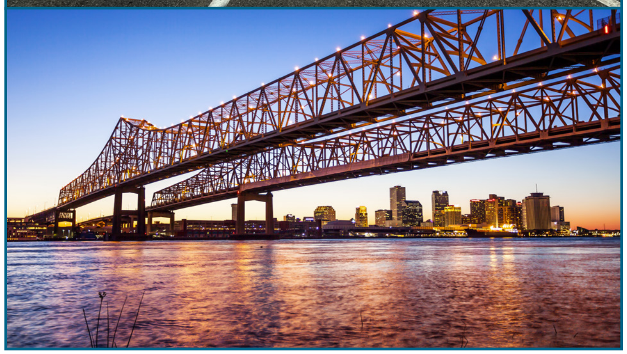
FHWA Accepts Applications for $9.7 Billion in Bridge Funding. The U.S. Department of Transportation's Federal Highway Administration (FHWA) is now accepting applications for $9.7 billion in multi-year funding (announced in September), to improve the Nation's bridges.

FHWA's competitive Bridge Investment Program will finance two grant categories related to projects under $100 million: "planning" grants will fund planning, feasibility analyses, and revenue forecasting associated with project development. "Bridge project" grants will fund bridge replacement, rehabilitation, preservation, and protection projects.

The current funding builds on other Bridge Investment Program opportunities made possible under the Infrastructure Investment and Jobs Act of 2021, including for "large bridge projects" greater than $100 million. In fiscal year (FY) 2022, the Bridge Investment Program invested $2.4 billion to plan and build 37 bridges in 29 States across the country. For FY 2023 and 2024, the deadline for planning grants is February 19, 2024, and the deadline for bridge project grants is March 19, 2024.

Port of New Orleans Receives DOT Funding To Build New Terminal. The Department of Transportation (DOT)—through its Mega Grant Program—recently awarded $73.77 million to the Port of New Orleans (Port NOLA) to build the first phase of its new Louisiana International Terminal (LIT).

With an overall cost of $1.8 billion, the LIT project will be built through a historic public-private partnership between Port NOLA and two private terminal operators—New Jersey-based Ports America and Geneva, Switzerland-based Mediterranean Shipping Company. Together, the two terminal operators have committed $800 million to the project. In addition to the partnership and DOT's funding, the LIT project has garnered support from more than a dozen ports in six States, as well as from major agriculture and trade associations. LIT will sharply increase Louisiana's import and export capacity, by eliminating air-draft restrictions that currently limit the size of the vessels that can call on Port NOLA. By 2050, the project is expected to generate 32,000 new jobs nationwide (including 18,000 in Louisiana), and more than $1 billion in new State and local tax revenue.



Export Sales

For the week ending December 28, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2023/24 totaled 36.94 million metric tons (mmt), down 3 percent from last week and up 17 percent from the same time last year.

Net **corn export sales** for MY 2023/24 were 0.368 mmt, down 70 percent from last week. Net **soybean export sales** were 0.202 mmt, down 80 percent from last week. Net weekly **wheat export sales** were 0.132 mmt, down 52 percent from last week.

Rail

U.S. Class I railroads originated 19,797 **grain carloads** during the week ending December 30. This was a 22-percent decrease from the previous week, 3 percent fewer than last year, and 16 percent fewer than the 3-year average.

Average January **shuttle secondary railcar bids/offers** (per car) were $79 above tariff for the week ending January 4. This was $1 less than last week and $927 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $319 above tariff. This was $40 more than last week and $281 lower than this week last year.

Barge

For the week ending January 6, **barged grain movements** totaled 390,050 tons. This was 11 percent less than the previous week and 10 percent more than the same period last year.

For the week ending January 6, 249 grain barges **moved down river**—16 fewer than last week. There were 839 grain barges **unloaded** in the New Orleans region, 39 percent more than last week.

Ocean

For the week ending January 4, 26 **oceangoing grain vessels** were loaded in the Gulf—up 24 percent from the same period last year. Within the next 10 days (starting January 5), 53 vessels were expected to be loaded—unchanged from the same period last year.

As of January 4, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $60.75. This was unchanged from last week. The rate from the Pacific Northwest to Japan was $31.75 per mt, unchanged from last week.

Fuel

For the week ending January 8, the U.S. average **diesel price** decreased 4.8 cents from the previous week to $3.828 per gallon, 72.1 cents below the same week last year.

Date	Event	Location	Website
January 22	**U.S. Wheat Associates (USW) and National Association of Wheat Growers (NAWG) Winter Joint Board Meeting.** USW and NAWG represent the interests of wheat growers, exporters, and shippers. Although an agenda is not yet available, past winter events have included a meeting of the "Wheat Transportation Working Group."	Washington, DC	https://www.uswheat.org/meetings/2024-usw-nawg-winter-joint-board-meeting/
January 22-25	**AAPA 2024 POWERS Summit and Expo.** The 2024 Port Opportunities With Energy, Resilience, and Sustainability (POWERS) Summit and Exposition is an event of the American Association of Port Authorities (AAPA). The POWERS Summit and Expo convenes port executives, energy leaders, environmental experts, and other key stakeholders in port operations and development.	Tampa, FL	https://aapa.getregistered.net/2024-aapa-powers
January 29	**AgTC/USDA Ag Shipper Workshop—Portland, OR.** USDA partners with the Agriculture Transportation Coalition (AgTC) to offer a series of Ag Shipper Workshops around the country each year. This month, local agricultural exporters and freight forwarders will meet in Portland, OR, to discuss the status of agricultural transportation in the Pacific Northwest.	Portland, OR	https://agtrans.org/events/workshops
January 31-February 2	**2024 TEGMA Annual Meeting.** At its annual meeting, the Transportation, Elevator and Grain Merchants Association (TEGMA) invites the grain-based agribusiness industry to debate, discuss, and facilitate resolution of operational and business issues. Featured presentations are from Ingram Marine Group, Agtegra Cooperative, AGR Partners, and HighGround, Inc.	Scottsdale, AZ	https://www.tegma.org/2024
February 1	**AgTC/USDA Ag Shipper Workshop—Boise, ID.** In February, local agricultural exporters and freight forwarders will meet in Boise, ID, to discuss the status of agricultural transportation in that region. Executives from Ocean Network Express will be on hand to discuss export opportunities.	Boise, ID	https://agtrans.org/events/workshops
February 15-16	**2024 USDA Agricultural Outlook Forum.** USDA's 100th annual Agricultural Outlook Forum—this year themed, "Cultivating the Future"—offers opportunities for exchanging ideas, information, and best practices among producers, processors, policymakers, government officials, and nongovernmental organizations.	Arlington, VA and Online	https://reg.eventmobi.com/USDAOutlookForum2024
March 11-18	**The 2024 NWC Legislative Summit.** This event of the National Waterways Conference (NWC) explores congressional, regulatory, and administrative policies within the water resources realm. The summit is attended by NWC members and other waterways-infrastructure stakeholders, as well as staff from the U.S. Army Corps of Engineers and congressional offices.	Washington, DC	https://waterways.org/events-education/legislative-summit/
March 17-19	**National Grain and Feed Association—128th Annual Convention 2024.** The National Grain and Feed Association (NGFA) represents grain shippers before regulatory bodies, such as the Surface Transportation Board. It also serves as an arbiter for grain transportation disputes. The Convention includes several committee meetings related to transportation.	Orlando, FL	https://www.ngfa.org/annual-convention/
April 4-5	**65th Transportation Research Forum Annual Meeting.** The Transportation Research Forum (TRF) convenes transportation practitioners, regulators, and academics from multiple modes and sectors to share ideas and explore current research and policy issues.	Arlington, VA	https://annualforum.trforum.org/
April 25	**2024 TEGMA Spring Meeting.** TEGMA's spring meeting offers a railroad panel, a featured speaker, and a grain industry panel.	Nashville, TN	https://www.tegma.org/2024-4
May 29-31	**Inland Marine Expo (IMX) 2024.** Produced by the *Waterways Journal*, IMX 2024 is targeted specifically to the inland and intracoastal marine industry. IMX 2024 includes access to nine expert-led educational sessions, networking events, and a trade show.	Nashville, TN	https://inlandmarineexpo.com/
June 4-5	**2024 *Freight Waves* Future of Supply Chain.** This third annual event hosted by *Freight Waves* publication features keynotes from thought-provoking analysts, sessions led by more than 70 freight industry experts, and a live demo FreightTech competition.	Atlanta, GA	https://live.freightwaves.com/future-of-supply-chain-2024

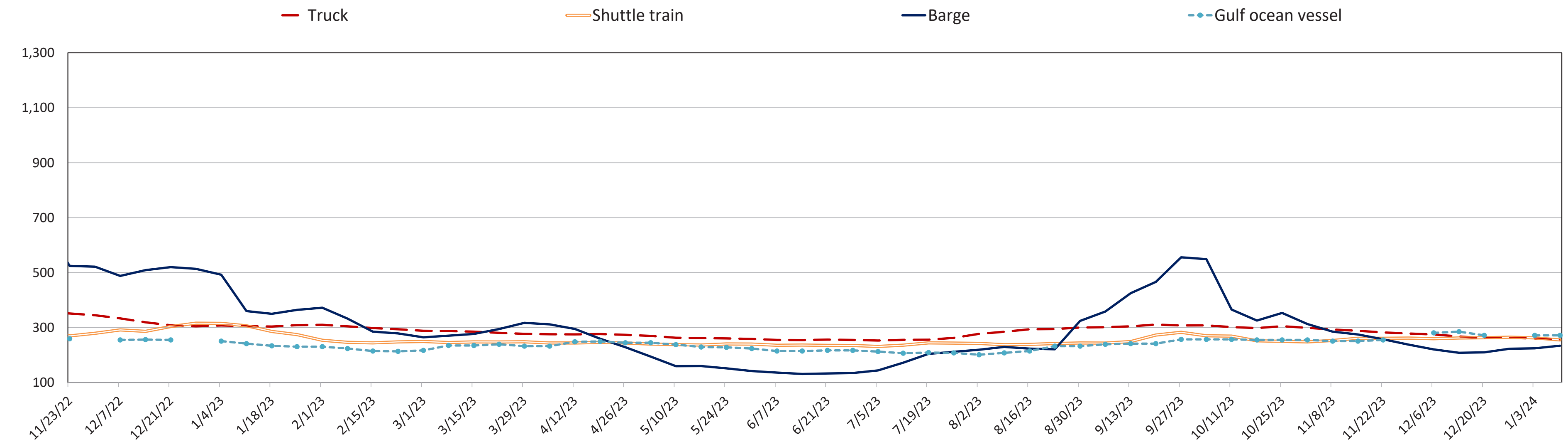
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
01/10/24	257	336	255	234	272	225
01/03/24	260	340	263	224	272	225
01/11/23	305	358	307	360	242	216

Note: 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 due to holiday.
Source: USDA, Agricultural Marketing Service.

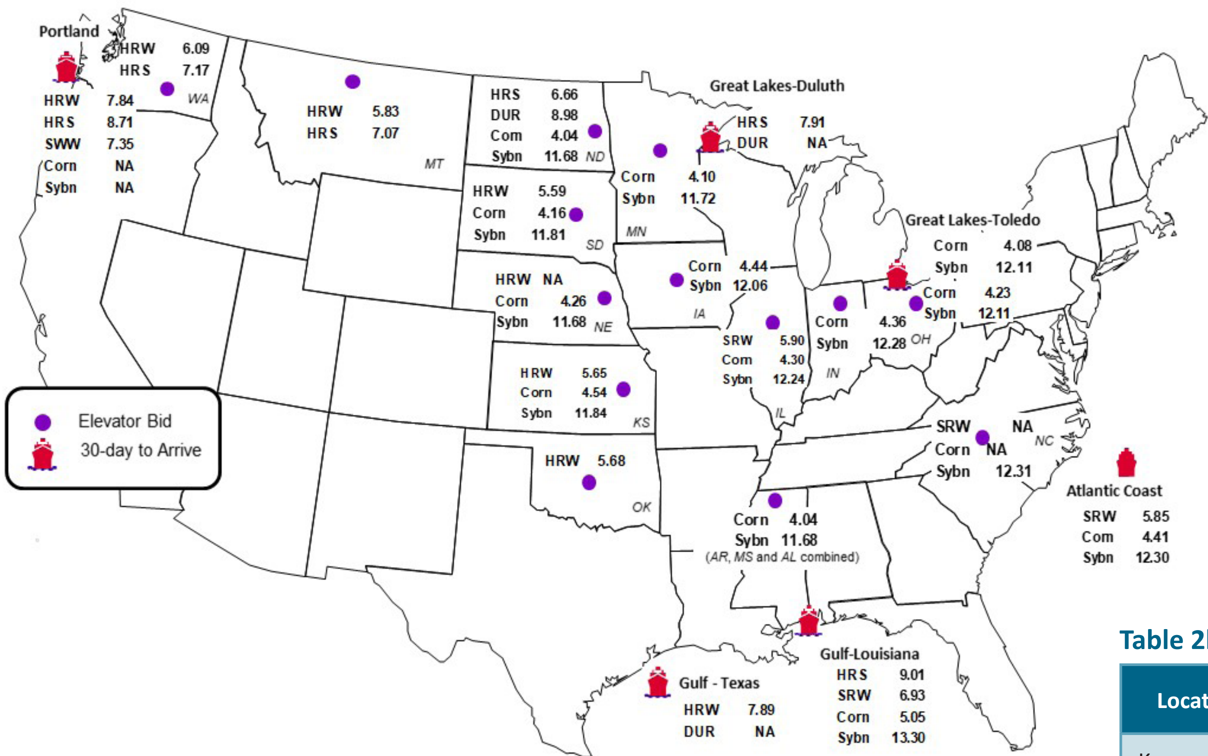
Figure 1. Grain transportation cost indicators as of week ending 1/10/24



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

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.



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

Commodity	Origin–destination	1/5/2024	12/29/2023
Corn	IL–Gulf	-0.76	-0.74
Corn	NE–Gulf	-0.80	-0.78
Soybean	IA–Gulf	-1.24	-1.16
HRW	KS–Gulf	-2.24	-2.10
HRS	ND–Portland	-2.05	-2.05

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
Source: USDA, Agricultural Marketing Service.

Table 2b. Futures

Location	Grain	Month	1/5/2024	Week ago 12/29/2023	Year ago 1/06/2023
Kansas City	Wheat	Dec	6.146	6.300	8.332
Minneapolis	Wheat	Dec	7.120	7.234	9.030
Chicago	Wheat	Dec	6.004	6.174	7.450
Chicago	Corn	Dec	4.572	4.660	6.532
Chicago	Soybean	Jan	12.386	12.742	14.970

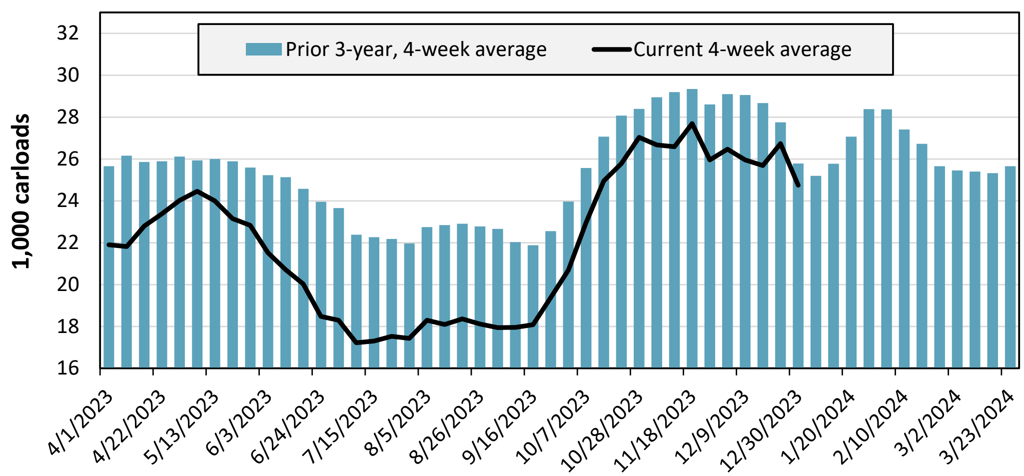
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 12/30/2023	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,245	1,755	10,138	4,486	1,545	628	19,797
This week last year	1,602	2,725	8,333	4,407	2,016	1,361	20,444
2023 YTD	91,152	128,037	491,129	273,672	129,336	65,174	1,178,500
2022 YTD	93,313	130,229	570,232	296,945	139,298	83,584	1,313,601
2023 YTD as % of 2022 YTD	98	98	86	92	93	78	90
Last 4 weeks as % of 2022	90	88	117	107	107	55	103
Last 4 weeks as % of 3-yr. avg.	92	101	99	95	103	60	96
Total 2022	93,392	129,293	571,376	297,775	140,039	83,680	1,315,555

Note: The last 4-week percentages compare the last 4 weeks of this year to the closest 4 weeks of last year, and to the average across the prior 3 years. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.
Source: Surface Transportation Board.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending December 30, grain carloads were down 7 percent from the previous week, up 3 percent from last year, and down 4 percent from the 3-year average.

Source: Surface Transportation Board.

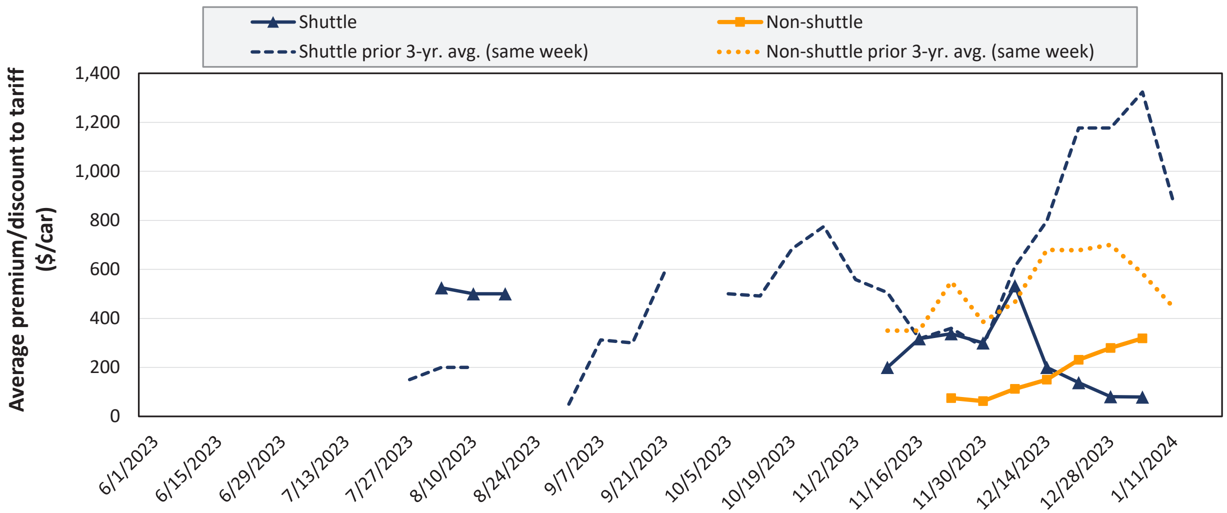
Table 4. Railcar auction offerings (dollars per car)

For the week ending: 1/4/2024		Delivery period							
		Jan-24	Jan-23	Feb-24	Feb-23	Mar-24	Mar-23	Apr-24	Apr-23
BNSF	COT grain units	no offer	n/a	no offer	n/a	no offer	n/a	6	n/a
	COT grain single-car	no offer	n/a	no offer	n/a	no offer	n/a	103	n/a
UP	GCAS/vouchers	no bid	n/a	no bid	n/a	no bid	n/a	no bid	n/a

Note: Auction offerings are for single-car and unit train shipments only. Bids and offers represent a premium/discount to tariff rates. n/a = not available. BNSF = BNSF Railway; COT = Certificate of Transportation; UP = Union Pacific Railroad; and GCAS = Grain Car Allocation System. Minimum bids for UP GCAS/vouchers are $10.
Source: USDA, Agricultural Marketing Service.

Primary auction market rates reflect offers and bids made between railroads and shippers for guaranteed car service. The secondary rail market information reflects trade values for service agreements traded between shippers that were originally purchased from the railroad carrier. The auction and secondary rail values are indicators of rail service quality and demand/supply. Bids and offers listed in the primary and secondary auctions are market indicators only and are not guaranteed prices.

Figure 4: Secondary market bids/offers for railcars to be delivered in January 2024



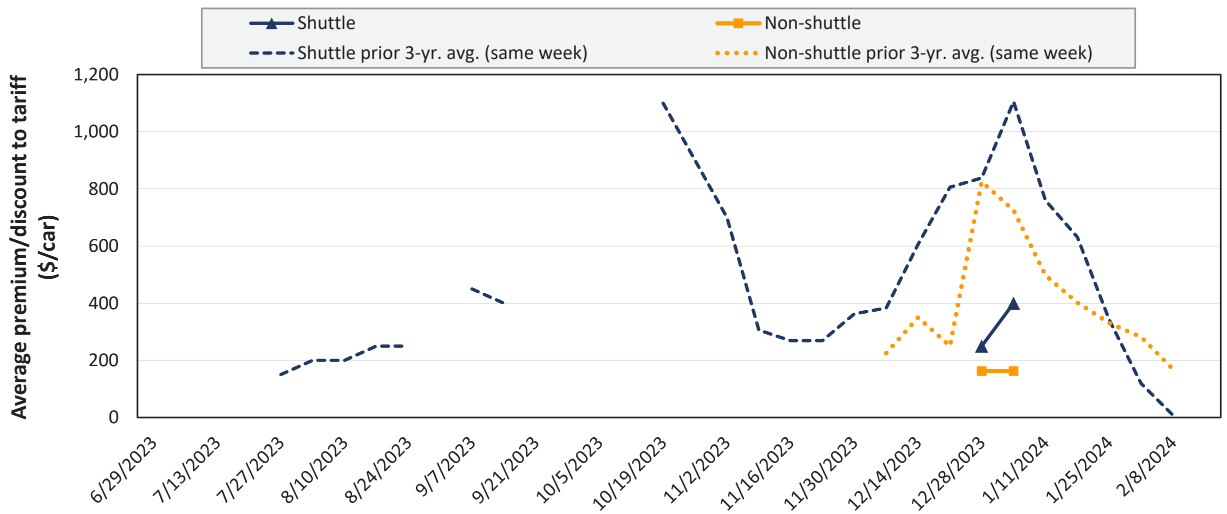
Average non-shuttle bids/offers rose $40 this week, and are at the peak.

Average shuttle bids/offers fell $1 this week and are $454 below the peak.

1/4/2024	BNSF	UP
Non-Shuttle	$600	$38
Shuttle	$392	-$233

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 5: Secondary market bids/offers for railcars to be delivered in February 2024



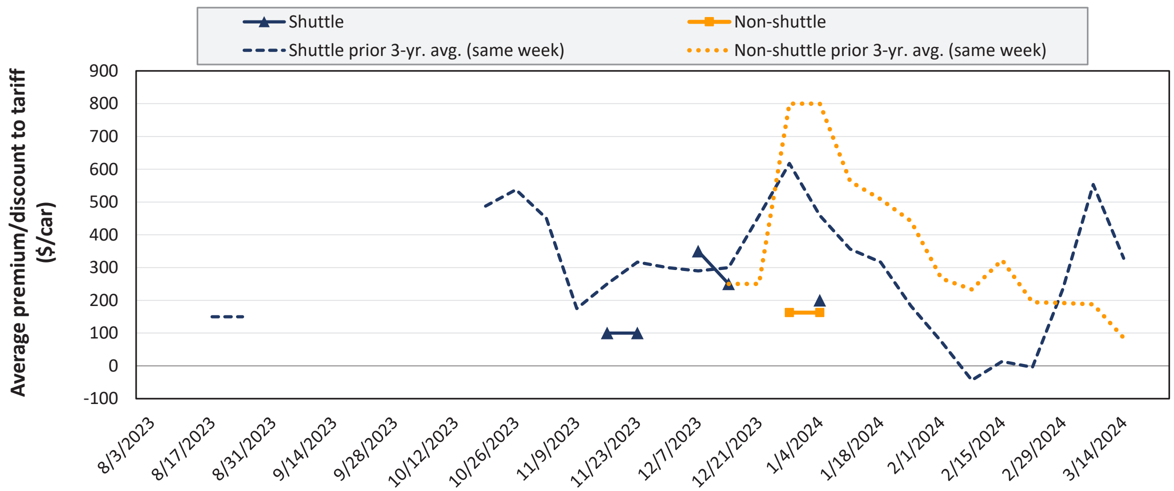
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers rose $150 this week and are at the peak.

1/4/2024	BNSF	UP
Non-Shuttle	$300	$25
Shuttle	$400	n/a

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 6: Secondary market bids/offers for railcars to be delivered in March 2024



Average non-shuttle bids/offers are unchanged this week, and are at the peak.

There were no shuttle bids/offers last week. Average shuttle bids/offers this week are $150 below the peak.

1/4/2024	BNSF	UP
Non-Shuttle	$300	$25
Shuttle	$200	n/a

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

Table 5. Weekly secondary railcar market (dollars per car)

For the week ending: 1/4/2024		Delivery period					
		Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24
Non-shuttle	BNSF	600	300	300	n/a	n/a	n/a
	Change from last week	67	0	0	n/a	n/a	n/a
	Change from same week 2023	-100	n/a	n/a	n/a	n/a	n/a
	UP	38	25	25	n/a	n/a	n/a
	Change from last week	13	0	0	n/a	n/a	n/a
	Change from same week 2023	-463	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF	392	400	200	n/a	n/a	n/a
	Change from last week	-18	150	n/a	n/a	n/a	n/a
	Change from same week 2023	-121	92	33	n/a	n/a	n/a
	UP	-233	n/a	n/a	n/a	n/a	n/a
	Change from last week	17	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	-1,733	n/a	n/a	n/a	n/a	n/a
	CPKC	-50	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	-550	n/a	n/a	n/a	n/a	n/a

Note: Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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 6. Tariff rail rates for unit train shipments

January 2024	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Wichita, KS	St. Louis, MO	$4,095	$223	$42.88	$1.17	3
	Grand Forks, ND	Duluth-Superior, MN	$3,508	$77	$35.61	$0.97	-11
	Wichita, KS	Los Angeles, CA	$6,840	$398	$71.87	$1.96	-12
	Wichita, KS	New Orleans, LA	$4,825	$392	$51.80	$1.41	1
	Sioux Falls, SD	Galveston-Houston, TX	$6,611	$327	$68.89	$1.88	-12
	Colby, KS	Galveston-Houston, TX	$5,075	$429	$54.66	$1.49	1
	Amarillo, TX	Los Angeles, CA	$5,121	$597	$56.78	$1.55	-5
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$443	$44.12	$1.12	-4
	Toledo, OH	Raleigh, NC	$8,877	$0	$88.15	$2.24	4
	Des Moines, IA	Davenport, IA	$2,830	$94	$29.03	$0.74	5
	Indianapolis, IN	Atlanta, GA	$6,866	$0	$68.18	$1.73	4
	Indianapolis, IN	Knoxville, TN	$5,790	$0	$57.50	$1.46	4
	Des Moines, IA	Little Rock, AR	$4,425	$275	$46.68	$1.19	1
	Des Moines, IA	Los Angeles, CA	$6,305	$802	$70.58	$1.79	-3
Soybeans	Minneapolis, MN	New Orleans, LA	$3,156	$655	$37.85	$1.03	-21
	Toledo, OH	Huntsville, AL	$7,269	$0	$72.18	$1.96	3
	Indianapolis, IN	Raleigh, NC	$8,169	$0	$81.12	$2.21	4
	Indianapolis, IN	Huntsville, AL	$5,921	$0	$58.80	$1.60	4
	Champaign-Urbana, IL	New Orleans, LA	$5,040	$443	$54.45	$1.48	-0

Note: 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. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 7. Tariff rail rates for shuttle train shipments

January 2024	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Great Falls, MT	Portland, OR	$4,043	$229	$42.42	$1.15	-12
	Wichita, KS	Galveston-Houston, TX	$4,111	$178	$42.59	$1.16	-8
	Chicago, IL	Albany, NY	$7,413	$0	$73.61	$2.00	5
	Grand Forks, ND	Portland, OR	$5,701	$395	$60.54	$1.65	-11
	Grand Forks, ND	Galveston-Houston, TX	$5,146	$405	$55.13	$1.50	-11
	Colby, KS	Portland, OR	$5,923	$704	$65.80	$1.79	-5
Corn	Minneapolis, MN	Portland, OR	$5,660	$481	$60.99	$1.55	-7
	Sioux Falls, SD	Tacoma, WA	$5,620	$441	$60.19	$1.53	-7
	Champaign-Urbana, IL	New Orleans, LA	$4,345	$443	$47.54	$1.21	-1
	Lincoln, NE	Galveston-Houston, TX	$4,560	$257	$47.83	$1.22	-1
	Des Moines, IA	Amarillo, TX	$4,845	$346	$51.55	$1.31	0
	Minneapolis, MN	Tacoma, WA	$5,660	$477	$60.95	$1.55	-7
	Council Bluffs, IA	Stockton, CA	$5,780	$494	$62.30	$1.58	-4
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,335	$441	$67.29	$1.83	-6
	Minneapolis, MN	Portland, OR	$6,385	$481	$68.19	$1.86	-7
	Fargo, ND	Tacoma, WA	$6,235	$392	$65.81	$1.79	-6
	Council Bluffs, IA	New Orleans, LA	$5,270	$510	$57.40	$1.56	-1
	Toledo, OH	Huntsville, AL	$5,509	$0	$54.71	$1.49	4
	Grand Island, NE	Portland, OR	$5,905	$720	$65.79	$1.79	-2

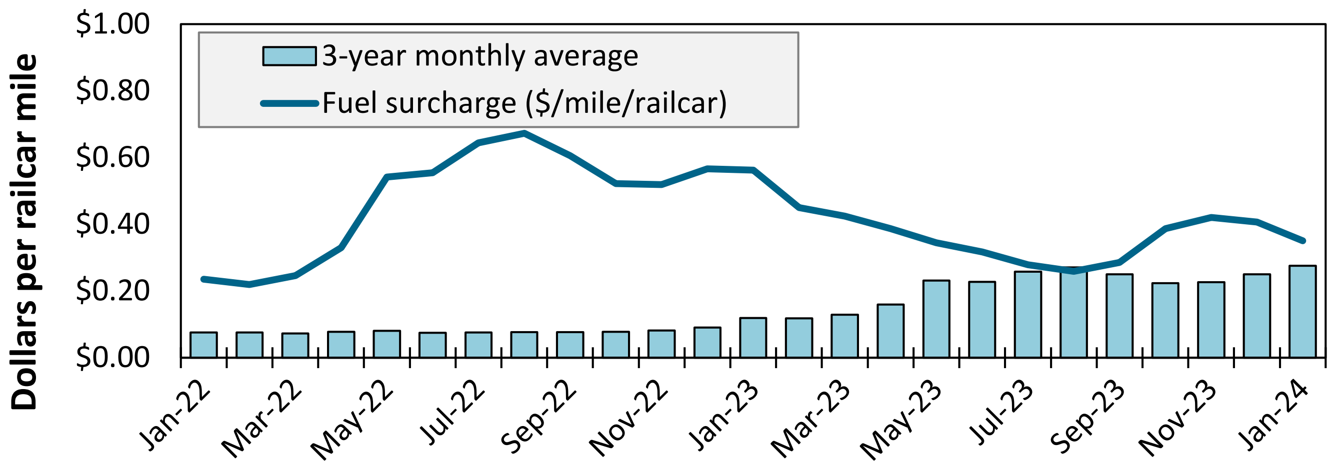
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the 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

December 2021	Origin state	Destination region	Tariff rate per car	Fuel surcharge per car	Tariff rate plus fuel surcharge per:		Percent change Y/Y
					metric ton	bushel	
Wheat	MT	Chihuahua, CI	$7,699	$0	$78.67	$2.14	4
	OK	Cuautitlan, EM	$6,900	$230	$72.85	$1.98	6
	KS	Guadalajara, JA	$7,619	$719	$85.19	$2.32	7
	TX	Salinas Victoria, NL	$4,420	$138	$46.57	$1.27	4
Corn	IA	Guadalajara, JA	$9,102	$663	$99.77	$2.53	6
	SD	Celaya, GJ	$8,300	$0	$84.81	$2.15	2
	NE	Queretaro, QA	$8,322	$462	$89.75	$2.28	5
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,687	$450	$83.14	$2.11	5
	SD	Torreon, CU	$7,825	$0	$79.95	$2.03	2
Soybeans	MO	Bojay (Tula), HG	$8,647	$614	$94.63	$2.57	5
	NE	Guadalajara, JA	$9,207	$646	$100.67	$2.74	5
	IA	El Castillo, JA	$9,510	$0	$97.17	$2.64	1
	KS	Torreon, CU	$8,109	$466	$87.61	$2.38	5
Sorghum	NE	Celaya, GJ	$7,932	$597	$87.15	$2.21	6
	KS	Queretaro, QA	$8,108	$287	$85.77	$2.18	3
	NE	Salinas Victoria, NL	$6,713	$231	$70.94	$1.80	3
	NE	Torreon, CU	$7,225	$438	$78.29	$1.99	6

Note: Rates are based on published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements. The table assumes 97.87 metric tons per car, 56 pounds per bushel for corn and sorghum, and 60 pounds per bushel for wheat and soybeans. Percentage change year over year (Y/Y) is calculated using the tariff rate plus fuel surcharge. **As of January 1, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico. As we incorporate the change, table 8 updates will be delayed.**
Source: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

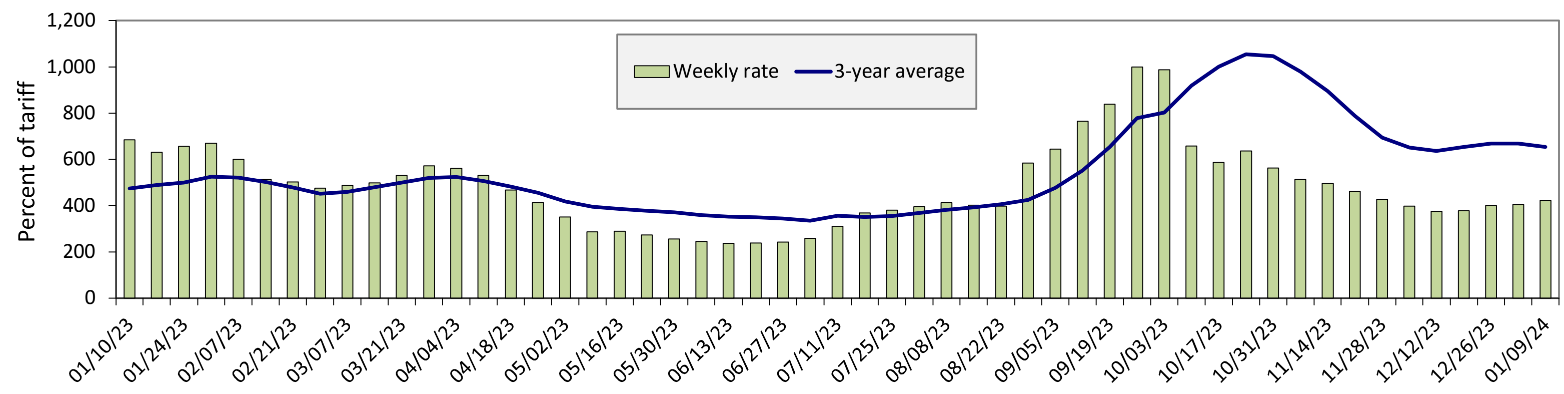
Figure 7. Railroad fuel surcharges, North American weighted average



January 2024: $0.35/mile, down 6 cents from last month's surcharge of $0.41/mile; down 21 cents from the January 2023 surcharge of $0.56/mile; and up 7 cents from the January prior 3-year average of $0.28/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 8. Illinois River barge freight rate



For the week ending January 9: 4 percent higher than the previous week; and 38 percent lower than last year; and 36 percent lower than the 3-year average.

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.
Source: USDA, Agricultural Marketing Service.

Table 9. Weekly barge freight rates: southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate	1/9/2024	-	-	421	326	349	349	270
	1/2/2024	-	-	404	320	326	326	274
$/ton	1/9/2024	-	-	19.53	13.01	16.37	14.10	8.48
	1/2/2024	-	-	18.75	12.77	15.29	13.17	8.60

Measure	Time Period	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Current week % change from the same week	Last year	-	-	-38	-40	-41	-41	-39
	3-year avg.	-	-	-36	-42	-40	-40	-40
Rate	February	-	-	423	317	330	330	273
	April	409	380	369	297	314	314	263

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "-" = data not available.
Source: USDA, Agricultural Marketing Service.

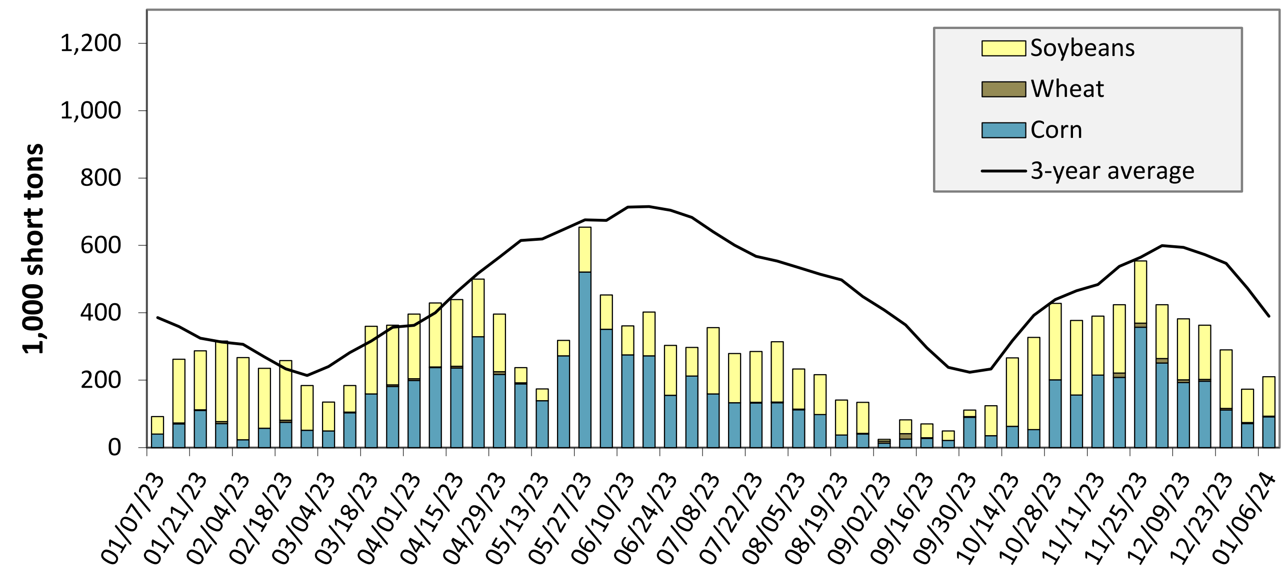
Figure 9. Benchmark tariff rates

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.

Source: USDA, Agricultural Marketing Service.

Figure 10. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending January 6: 128 percent higher than last year and 46 percent lower than the 3-year average.

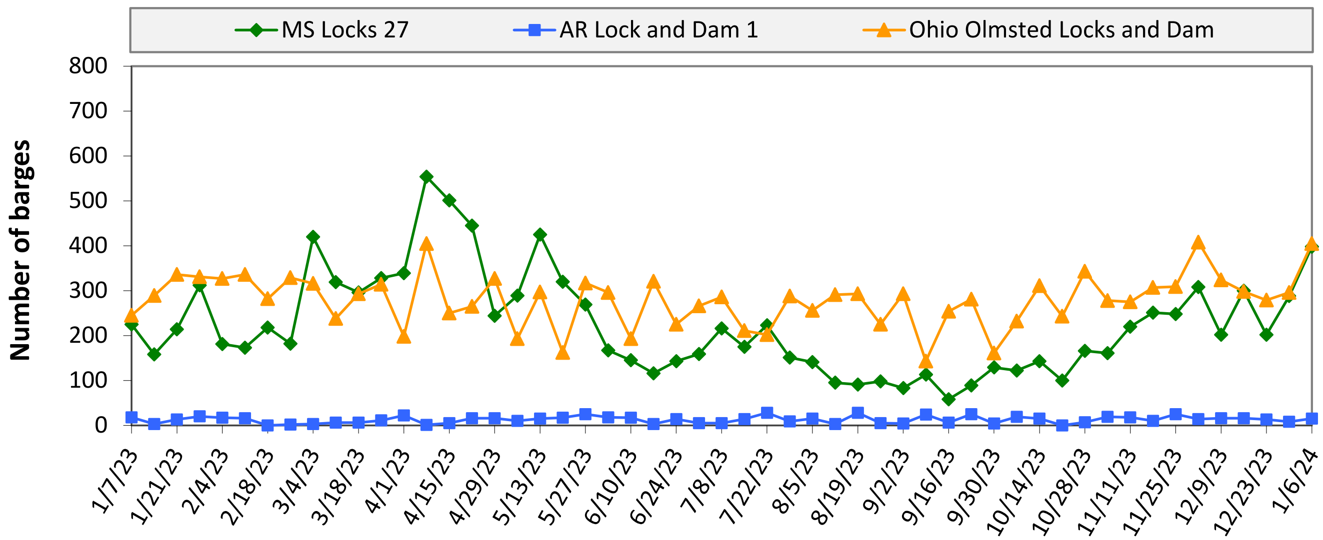
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

Table 10. Barged grain movements (1,000 tons)

For the week ending 01/06/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	0	0	0	0	0
Mississippi River (Winfield, MO (L25))	19	2	42	0	63
Mississippi River (Alton, IL (L26))	116	2	130	2	249
Mississippi River (Granite City, IL (L27))	91	2	117	8	217
Illinois River (La Grange)	68	0	101	19	188
Ohio River (Olmsted)	87	18	51	2	158
Arkansas River (L1)	0	7	8	0	15
Weekly total - 2024	178	26	176	10	390
Weekly total - 2023	96	1	245	12	355
2024 YTD	178	26	176	10	390
2023 YTD	96	1	245	12	355
2024 as % of 2023 YTD	185	1,868	72	81	110
Last 4 weeks as % of 2023	114	141	74	193	92
Total 2023	12,857	1,346	11,824	267	26,294

Note: "Other" refers to oats, barely, sorghum, and rye. Total may not add up due to rounding. YTD = year to date. Weekly total, YTD, and calendar year total include Mississippi River lock 27, Ohio River Olmsted lock, and Arkansas Lock 1. "L" (as in "L15") refers to a lock, locks, or lock and dam facility. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

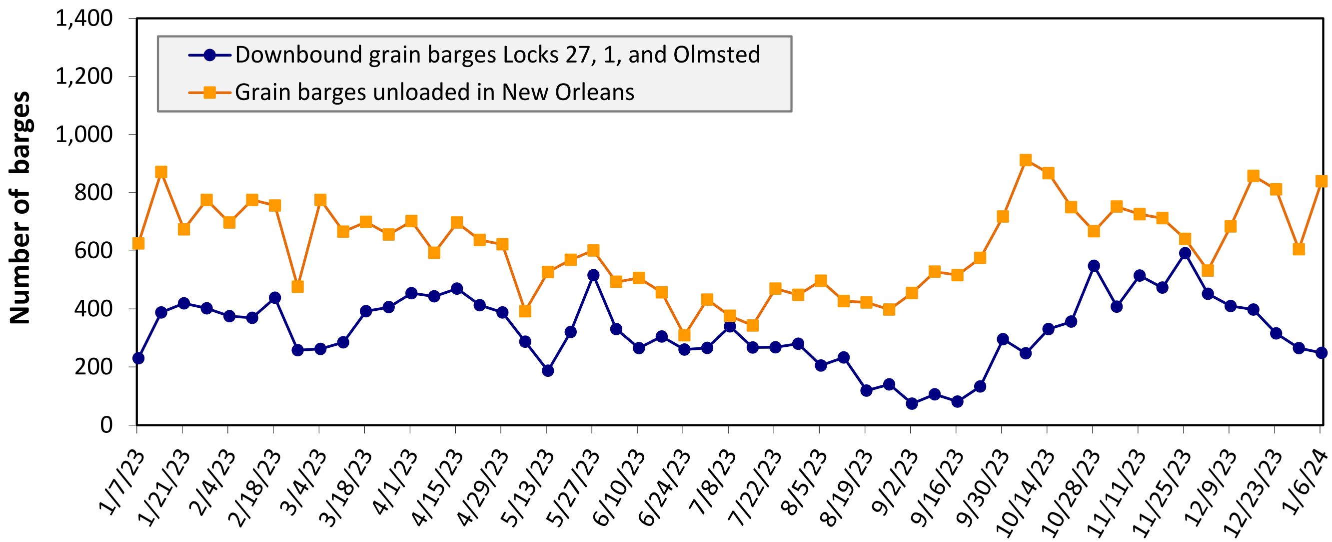
Figure 11. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending January 6: 818 barges transited the locks, 226 barges more than the previous week, and 41 percent higher than the 3-year average.

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

Figure 12. Grain barges for export in New Orleans region



For the week ending January 6: 249 barges moved down river, 16 fewer than the previous week; 839 grain barges unloaded in the New Orleans Region, 39 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

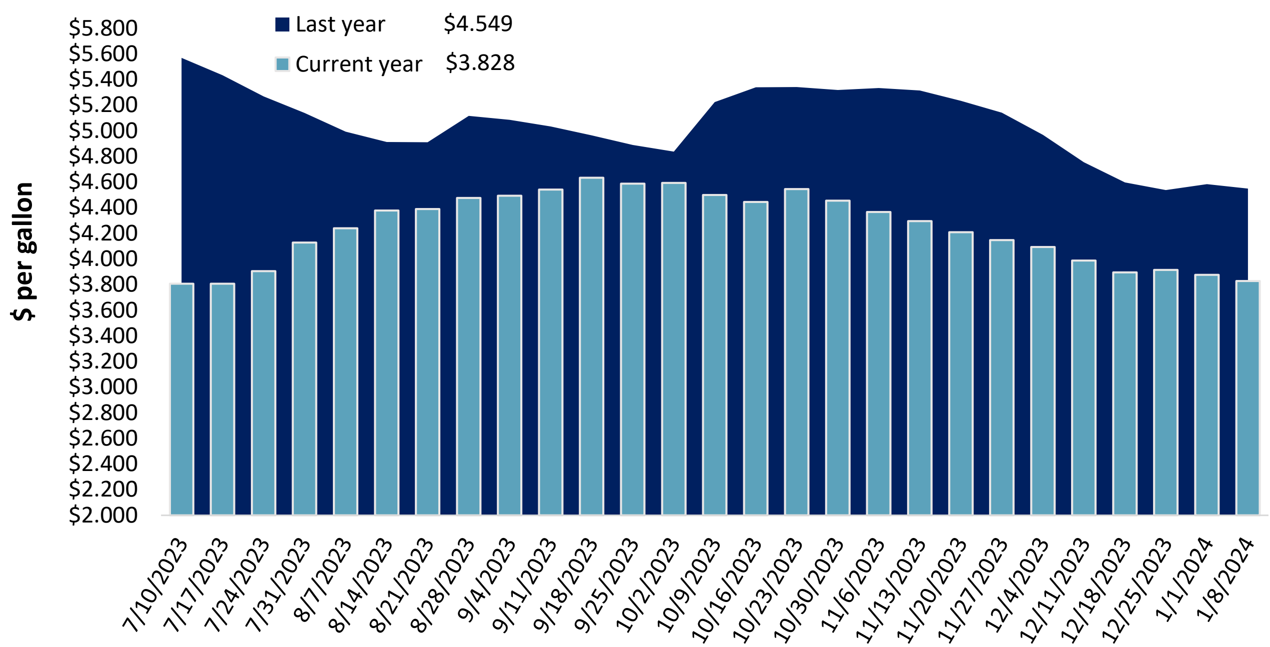
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 1/8/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.959	-0.043	-0.853
	New England	4.322	-0.012	-0.772
	Central Atlantic	4.249	-0.055	-0.954
	Lower Atlantic	3.814	-0.044	-0.827
II	Midwest	3.692	-0.058	-0.698
III	Gulf Coast	3.531	-0.034	-0.692
IV	Rocky Mountain	3.797	-0.090	-0.900
V	West Coast	4.570	-0.048	-0.510
	West Coast less California	4.063	-0.063	-0.697
	California	5.152	-0.032	-0.296
Total	United States	3.828	-0.048	-0.721

Note: Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel. On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13. Weekly diesel fuel prices, U.S. average



For the week ending January 8, the U.S. average diesel fuel price decreased 4.8 cents from the previous week to $3.828 per gallon, 72.1 cents below the same week last year.

Note: On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
Source: U.S. Department of Energy, Energy Information Administration.

Table 12. U.S. export balances and cumulative exports (1,000 metric tons)

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 12/28/2023	976	2,449	1,488	926	70	5,908	17,399	13,631	36,937
	This week year ago	942	632	1,350	1,267	117	4,308	11,744	15,645	31,696
	Last 4 wks. as % of same period 2022/23	103	381	115	82	81	141	150	91	119
Current shipped (cumulative) exports sales	2023/24 YTD	1,697	1,875	3,400	2,093	291	9,357	12,390	22,915	44,662
	2022/23 YTD	3,174	1,748	3,173	2,417	150	10,662	9,997	27,973	48,632
	YTD 2023/24 as % of 2022/23	53	107	107	87	195	88	124	82	92
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435
	Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622

Note: The marketing year for wheat is Jun. 1 to May 31 and, for corn and soybeans, Sep. 1 to Aug. 31. YTD = year-to-date; wks. = weeks.
Source: USDA, Foreign Agricultural Service.

Table 13. Top 5 importers of U.S. corn

For the week ending 12/28/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
Mexico	13,966	10,663	31	15,227
China	1,759	3,725	-53	12,616
Japan	4,215	1,728	144	10,273
Columbia	2,448	397	517	4,398
Korea	421	21	1952	2,563
Top 5 importers	**22,809**	**16,533**	**38**	**45,077**
Total U.S. corn export sales	**29,789**	**21,741**	**37**	**56,665**
% of YTD current month’s export projection	56%	52%		
Change from prior week	368	319		
Top 5 importers’ share of U.S. corn export sales	**77%**	**76%**		**80%**
USDA forecast December 2023	**53,343**	**42,192**	**26**	
Corn use for ethanol USDA forecast, December 2023	**135,255**	**131,471**	**3**	

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, “Exports” = carryover plus accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date.
Source: USDA, Foreign Agricultural Service.

Table 14. Top 5 importers of U.S. soybeans

For the week ending 12/28/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
China	19,610	26,049	-25	32,321
Mexico	3,158	3,274	-4	4,912
Egypt	302	752	-60	2,670
Japan	1,285	1,474	-13	2,259
Indonesia	781	636	23	1,973
Top 5 importers	**25,136**	**32,185**	**-22**	**44,133**
Total U.S. soybean export sales	**36,546**	**43,618**	**-16**	**56,656**
% of YTD current month's export projection	77%	80%		
Change from prior week	**202**	**721**		
Top 5 importers' share of U.S. soybean export sales	**69%**	**74%**		**78%**
USDA forecast, December 2023	**47,763**	**54,213**	**-12**	

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, "Exports" = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date.
Source: USDA, Foreign Agricultural Service.

Table 15. Top 10 importers of all U.S. wheat

For the week ending 12/28/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
Mexico	2,431	2,516	-3	3,397
Philippines	2,005	1,672	20	2,615
Japan	1,435	1,719	-17	2,281
China	2,261	681	232	1,740
Korea	1,002	1,005	-0	1,426
Nigeria	202	663	-70	1,276
Taiwan	826	603	37	944
Thailand	351	613	-43	643
Columbia	212	412	-49	537
Indonesia	379	299	27	469
Top 10 importers	**11,102**	**10,182**	**9**	**15,327**
Total U.S. wheat export sales	**15,265**	**14,970**	**2**	**20,411**
% of YTD current month's export projection	77%	72%		
Change from prior week	132	47		
Top 10 importers' share of U.S. wheat export sales	**73%**	**68%**		**75%**
USDA forecast, December 2023	**19,731**	**20,657**	**-4**	

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, "Exports" = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date.
Source: USDA, Foreign Agricultural Service.

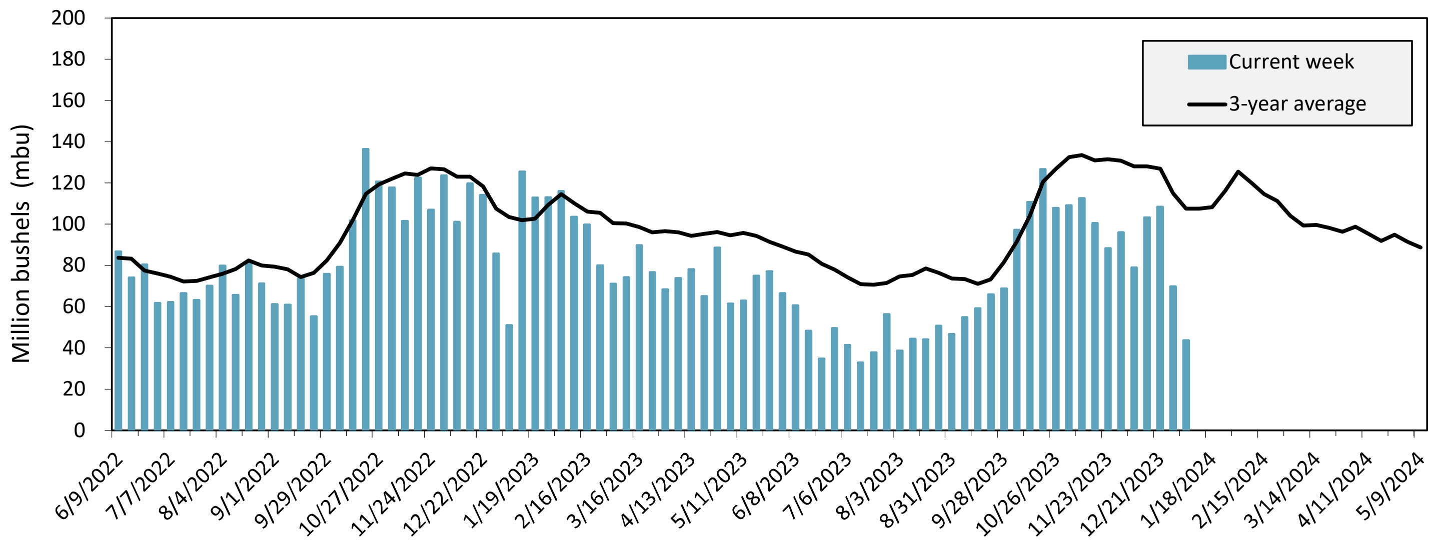
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 01/04/2024	Previous week*	Current week as % of previous	2024 YTD*	2023 YTD*	2024 YTD as % of 2023 YTD	Last 4-weeks as % of:		2023 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Wheat	252	210	120	252	104	241	199	144	10,155
	Corn	115	137	84	115	66	174	145	99	5,187
	Soybeans	208	244	85	208	211	99	87	66	10,649
	Total	**575**	**590**	**97**	**575**	**381**	**151**	**125**	**91**	**25,991**
Mississippi Gulf	Wheat	16	29	56	16	20	81	197	124	3,465
	Corn	126	283	44	126	61	208	107	77	22,787
	Soybeans	149	665	22	149	559	27	59	56	28,233
	Total	**291**	**977**	**30**	**291**	**640**	**45**	**73**	**64**	**54,485**
Texas Gulf	Wheat	0	3	12	0	0	n/a	57	51	1,649
	Corn	5	7	68	5	0	n/a	89	115	388
	Soybeans	0	0	n/a	0	0	n/a	0	0	281
	Total	**5**	**10**	**51**	**5**	**0**	**n/a**	**36**	**29**	**2,319**
Interior	Wheat	29	24	119	29	18	163	83	91	2,358
	Corn	105	133	79	105	142	74	111	117	10,191
	Soybeans	151	94	161	151	107	141	117	113	6,788
	Total	**285**	**250**	**114**	**285**	**267**	**107**	**109**	**112**	**19,337**
Great Lakes	Wheat	0	22	0	0	0	n/a	240	225	637
	Corn	0	0	n/a	0	0	n/a	0	0	56
	Soybeans	0	0	n/a	0	0	n/a	0	0	200
	Total	**0**	**22**	**0**	**0**	**1**	**n/a**	**121**	**97**	**892**
Atlantic	Wheat	0	0	n/a	0	0	n/a	n/a	0	106
	Corn	0	0	n/a	0	5	0	285	395	159
	Soybeans	7	9	71	7	76	9	33	40	2,106
	Total	**7**	**9**	**71**	**7**	**80**	**8**	**39**	**47**	**2,371**
U.S. total from ports*	Wheat	297	288	103	297	142	209	155	126	18,369
	Corn	351	560	63	351	273	129	116	90	38,769
	Soybeans	514	1,012	51	514	954	54	66	60	48,256
	Total	**1,163**	**1,860**	**63**	**1,163**	**1,369**	**85**	**87**	**75**	**105,394**

*Note: Data include revisions from prior weeks; some regional totals may not add exactly because of rounding. YTD = year-to-date; n/a = not applicable or no change.
Source: USDA, Federal Grain Inspection Service.

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.

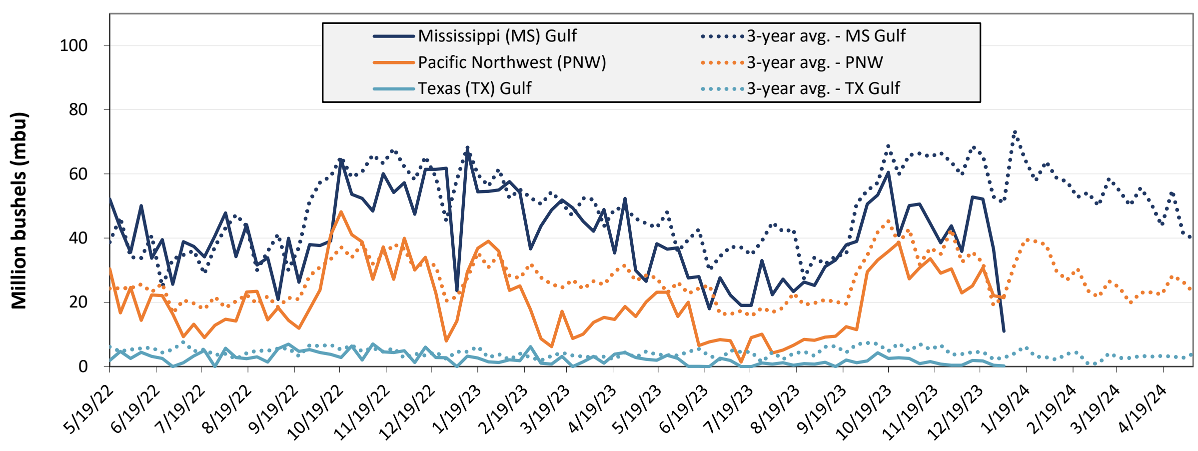
Figure 14. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending January 4: 43.6 mbu of grain inspected, down 37 percent from the previous week, down 14 percent from the same week last year, and down 59 percent from the 3-year average.

Note: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 15. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 01/04/24 inspections (mbu):
MS Gulf: 11
PNW: 21.4
TX Gulf: 0.2

Percent change from	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 70	down 48	down 70	down 3
Last year (same week)	down 53	n/a	down 53	up 51
3-year average (4-week moving average)	down 82	down 94	down 82	down 21

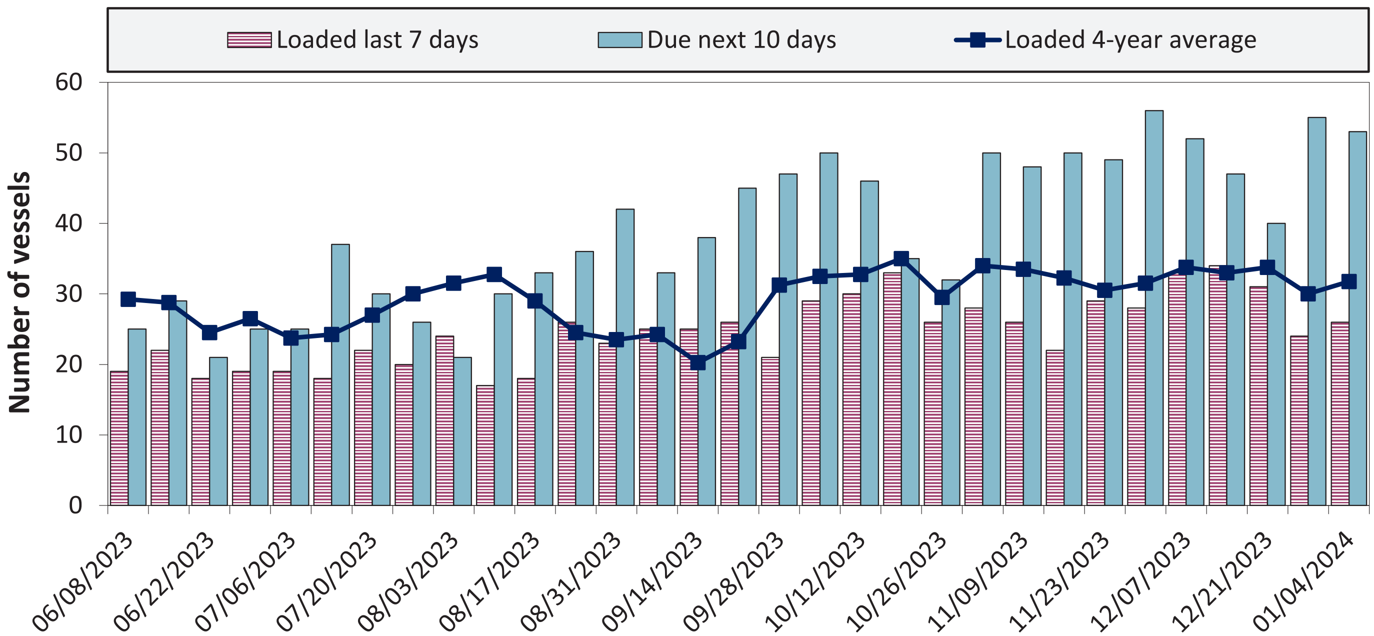
Source: USDA, Federal Grain Inspection Service.

Table 17. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/4/2024	30	26	53	11
12/28/2023	23	24	55	14
2023 range	(8...38)	(17...34)	(21...56)	(1...24)
2023 average	22	26	39	10

Note: The data are voluntarily submitted and may not be complete.
Source: USDA, Agricultural Marketing Service.

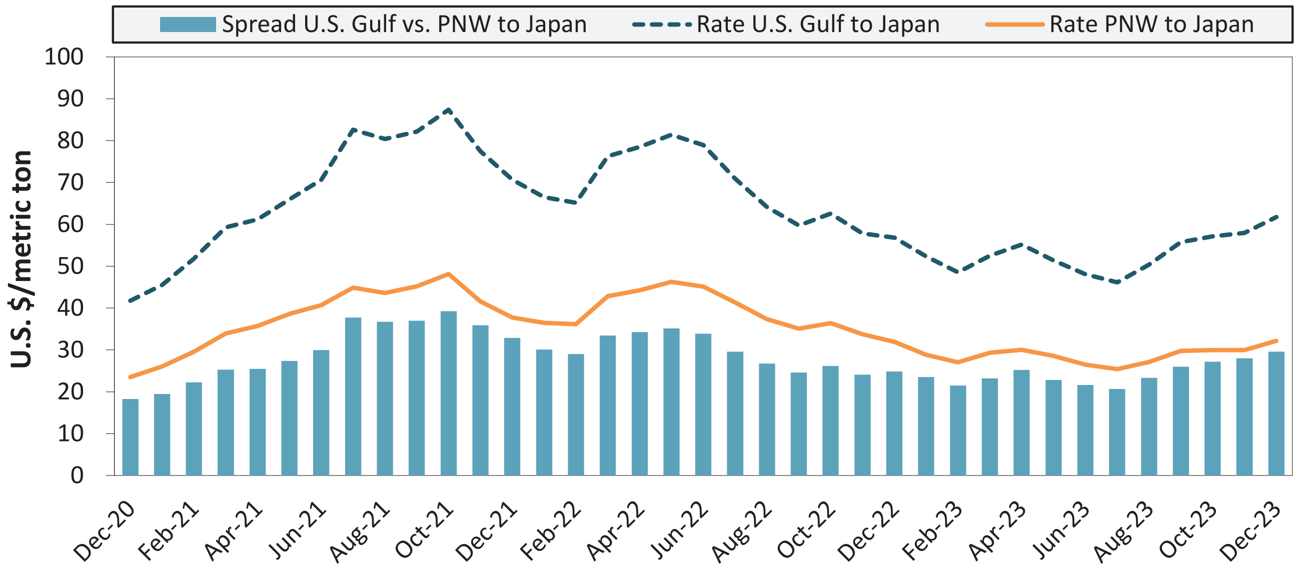
Figure 16. U.S . Gulf vessel loading activity



Week ending 1/04/24, number of vessels	Loaded	Due
Change from last year	23.8%	0.0%
Change from 4-year average	-18.1%	-7.8%

Note: U.S. Gulf includes Mississippi, Texas, and east Gulf
Source: USDA, Agricultural Marketing Service.

Figure 17. U.S. Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
December 2023	$61.75	$32.17	$29.58
Change from December 2022	8.7%	0.7%	18.9%
Change from 4-year average	14.3%	8.4%	21.6%

Note: PNW = Pacific Northwest
Source: O'Neil Commodity Consulting.

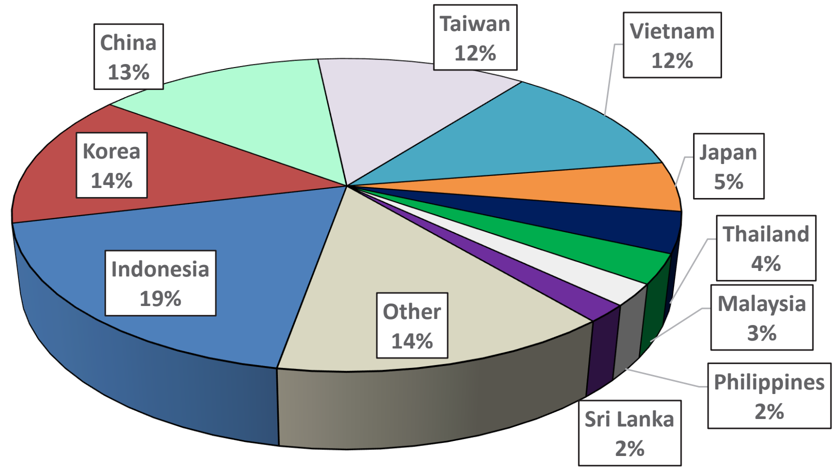
Table 18. Ocean freight rates for selected shipments, week ending 1/06/2024

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy grain	Sep 12, 2023	Oct 1/ Nov 1, 2023	66,000	54.50
U.S. Gulf	China	Heavy grain	Sep 6, 2023	Oct 1/10, 2023	68,000	55.00
U.S. Gulf	Jamaica	Wheat	Nov 2, 2023	Dec 1/10, 2023	9,460	63.50
U.S. Gulf	Colombia	Wheat	Oct 26, 2023	Dec 15/25, 2023	27,500	99.00
U.S. Gulf	Guyana	Wheat	Nov 2, 2023	Dec 1/10, 2023	8,250	84.00
U.S. Gulf	S. Korea	Heavy grain	Oct 10, 2023	Nov 25/Dec 5, 2023	58,000	65.35
U.S. Gulf	S. Korea	Heavy grain	Sep 27, 2023	Oct 25/Nov 5, 2023	57,000	64.85
U.S. Gulf	S. Korea	Heavy grain	Sep 19, 2023	Nov 1/15, 2023	58,000	64.50
U.S. Gulf	S. Korea	Heavy grain	Aug 1, 2023	Oct 1/20, 2023	57,000	58.30
PNW	N. China	Heavy grain	Oct 19, 2023	Nov 16/22, 2023	66,000	28.00
PNW	Thailand	Heavy grain	Oct 20, 2023	Dec 5/15, 2023	66,000	22.50
PNW	Yemen	Wheat	Oct 6, 2023	Nov 5/15, 2023	30,000	74.43
PNW	Yemen	Wheat	Sep 26, 2023	Nov 5/15, 2023	24,740	91.89
WC US	Thailand	Wheat	Nov 9, 2023	Dec 1/10, 2023	60,500	35.25
Brazil	China	Heavy grain	Oct 26, 2023	Dec 1/3, 2023	64,000	39.25

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B), except where otherwise indicated. op = option
Source: Maritime Research, Inc.

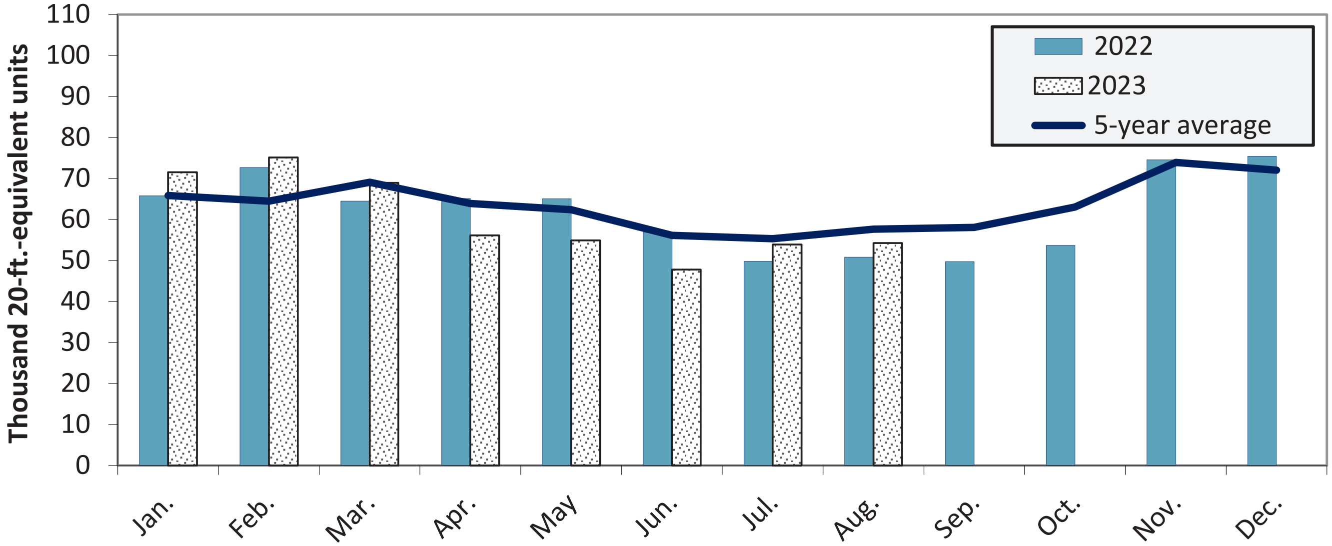
In 2020, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 66 percent of U.S. waterborne grain exports in 2020 went to Asia, of which 14 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined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

Figure 18. Top 10 destination markets for U.S. containerized grain exports, Jan-Aug 2023



Note: The following harmonized rariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.
Source: Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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



Containerized grain shipments in Aug. 2023 were up 6.9 percent from last year but down 5.8 percent from the 5-year average.

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.
Source: Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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Additional Transportation Research and Analysis resources include the ***Grain Truck and Ocean Rate Advisory (GTOR)***, the ***Mexico Transport Cost Indicator Report***, and the ***Brazil Soybean Transportation Report***.

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