USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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May 18, 2023

Contents

The next release is May 25, 2023

WEEKLY HIGHLIGHTS

UMR Reopens to Barges, as Illinois River Locks Prepare for Closures

As of May 13, the Upper Mississippi River (UMR) has reopened to barge traffic. Above St. Louis, MO, barge traffic had halted since April 23, when high water from spring flooding forced several locks to close. Lock and Dam 16, near Illinois City, IL, was the last site to reopen on May 13. Barge traffic may take a few weeks to normalize. From June 1 to September 30, three lock-and-dam locations on the Illinois River will close for upgrades and repairs: Brandon Road, Dresden Island, and Marseilles. Given the projects' significant lead time, impacts to agriculture should be minimal. Grain elevators along the river are well prepared, and the work should be completed before the fall harvest.

Secretary of Agriculture Sends Letter to STB on Rail Service

On May 12, the Secretary of Agriculture sent a letter to the Surface Transportation Board (STB). The letter expressed appreciation for STB's efforts to address rail service issues over the past year but also encouraged STB to take additional actions. Specifically, the letter encouraged STB to: (1) move forward on the private rail car use and emergency service dockets; (2) move forward on reciprocal switching; (3) provide clarity on the railroads' common carrier obligation, and (4) collect additional first-mile/last-mile data. More broadly, the letter expressed concern over precision scheduled railroading and its focus on cutting labor and assets to reduce costs and increase profits at the expense of service and safety. The letter concluded, STB should "ensure the railroads balance their focus on shareholders with their duty to provide high-quality common carrier rail service to the Nation."

Rail Fertilizer Carloads Reach All-Time High

According to data from the Surface Transportation Board (STB), the total of fertilizer carloads originated by Class I railroads for the week ending May 6, 2023, was 6,550—an all-time high since STB began collecting the data in March 2017. For the first 12 weeks of 2023, fertilizer carloads were 2 percent fewer than the prior 5-year average (*Grain Transportation Report (GTR)*, April 20, 2023). However, in the weeks since then (weeks 13 through 19), fertilizer carloads have risen, and are now 3 percent above the 5-year average. The rise in fertilizer carloads comes amid lower fertilizer prices than last year, higher corn plantings than last year, and restricted upbound barge traffic on the Mississippi River due to flooding (see first highlight).

Total Grain Inspections Down Slightly, With Decline in Soybeans

For the week ending May 11, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions were 1.56 million metric tons (mmt). Total grain inspections were down 2 percent from the previous week, down 28 percent from last year, and down 37 percent from the 3-year average. Although total grain inspections dropped only slightly, inspections of soybeans—primarily, destined to Asia—fell 63 percent. From the previous week, wheat inspections rose 13 percent and corn inspections rose 20 percent. From the previous week, total grain inspections increased 28 percent in the Pacific Northwest (PNW) and decreased 17 percent in the Mississippi Gulf. In the last 4 weeks, inspections of grain were 26 percent below last year and 28 percent below the 3-year average.

Snapshots by Sector

Export Sales

For the week ending May 4, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 17.40 million metric tons (mmt), down 8 percent from last week and down 41 percent from the same time last year. Net **corn export sales** for MY 2022/23 were 0.257 mmt, up significantly from last week. Net **soybean export sales** were 0.062 mmt, down 79 percent from last week. Net weekly **wheat export sales** were 0.026 mmt, down 88 percent from last week.

Rail

U.S. Class I railroads originated 21,700 **grain carloads** during the week ending May 6. This was a 2-percent increase from the previous week, 3 percent less than last year, and 6 percent lower than the 3-year average.

Average May **shuttle secondary railcar bids/offers** (per car) were $327 below tariff for the week ending May 11. This was $41 less than last week and $2,752 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were at tariff. This was $6 less than last week, and $250 lower than this week last year.

Barge

For the week ending May 13, **barged grain movements** totaled 292,879 tons. This was 37 percent less than the previous week and 65 percent less than the same period last year.

For the week ending May 13, 187 grain barges **moved down river**—100 fewer than last week. There were 527 grain barges **unloaded** in the New Orleans region, 34 percent more than last week.

Ocean

For the week ending May 11, 19 **oceangoing grain vessels** were loaded in the Gulf—41 percent fewer than the same period last year. Within the next 10 days (starting May 12), 40 vessels were expected to be loaded—20 percent fewer than the same period last year.

As of May 11, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $51.25. This was 4 percent less than the previous week. The rate from the Pacific Northwest to Japan was $28.50 per mt, 5 percent less than the previous week.

Fuel

For the week ending May 15, the U.S. average **diesel fuel price** decreased 2.5 cents from the previous week to $3.897 per gallon, 171.6 cents below the same week last year.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* May 18, 2023.
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Feature Article/Calendar

Wheat Total Landed Costs Fell in First Quarter 2023

From fourth quarter 2022 to first quarter 2023 (quarter to quarter), transportation costs fell for shipping wheat to Japan from Kansas (KS) and North Dakota (ND)—both via the Pacific Northwest (PNW routes) and the U.S. Gulf (Gulf routes). Quarter to quarter, a decline in ocean freight and truck rates was the main driver behind the lower transportation costs for all routes. From first quarter 2022 to first quarter 2023 (year to year), lower trucking and ocean freight rates reduced transportation costs for all routes (tables 1 and 2). Falling wheat farm values contributed to lower total landed costs for all routes, both from quarter to quarter and year to year. Total U.S. wheat inspected for export to Japan was up from quarter to quarter, but down from year to year.

Transportation Costs

From quarter to quarter, transportation costs for shipping wheat via the PNW routes decreased 7 percent. Also, quarter to quarter, transportation costs for shipping wheat via the Gulf routes fell 8 percent. Year to year, transportation costs were down 7 percent for the KS-PNW route and down 3 percent for the ND-PNW route. For the same period, transportation costs decreased 14 percent for the KS-Gulf route and fell 9 percent for the ND-Gulf route (tables 1 and 2).

Table 1: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the PNW

	Kansas					North Dakota				
Mode	2022 1st qtr	2022 4th qtr	2023 1st qtr	Year-to-year change	Quarterly change	2022 1st qtr	2022 4th qtr	2023 1st qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	16.67	16.31	14.75	-11.52	-9.56	16.67	16.31	14.75	-11.52	-9.56
Rail[1]	64.53	68.35	67.66	4.85	-1.01	58.10	67.08	66.58	14.60	-0.75
Ocean vessel	38.47	34.02	28.39	-26.20	-16.55	38.47	34.02	28.39	-26.20	-16.55
Transportation costs	119.67	118.68	110.80	-7.41	-6.64	113.24	117.41	109.72	-3.11	-6.55
Farm value[2]	319.67	332.53	310.12	-2.99	-6.74	361.56	335.47	319.67	-11.59	-4.71
Total landed cost	439.34	451.21	420.92	-4.19	-6.71	474.80	452.88	429.39	-9.56	-5.19
Transport % of landed cost	27.24	26.30	26.32			23.85	25.93	25.55		

Table 2: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the U.S. Gulf

	Kansas					North Dakota				
Mode	2022 1st qtr	2022 4th qtr	2023 1st qtr	Year-to-year change	Quarterly change	2022 1st qtr	2022 4th qtr	2023 1st qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	16.67	16.31	14.75	-11.52	-9.56	16.67	16.31	14.75	-11.52	-9.56
Rail[1]	43.80	45.96	45.58	4.06	-0.83	51.63	60.90	60.01	16.23	-1.46
Ocean vessel	69.31	59.07	51.12	-26.24	-13.46	69.31	59.07	51.12	-26.24	-13.46
Transportation costs	129.78	121.34	111.45	-14.12	-8.15	137.61	136.28	125.88	-8.52	-7.63
Farm value[2]	319.67	332.53	310.12	-2.99	-6.74	361.56	335.47	319.67	-11.59	-4.71
Total landed cost	449.45	453.87	421.57	-6.20	-7.12	499.17	471.75	445.55	-10.74	-5.55
Transport % of landed cost	28.88	26.73	26.44			27.57	28.89	28.25		

[1] Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[2] USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter).

Note: PNW = Pacific Northwest; qtr = quarter.

Source: USDA, Agricultural Marketing Service.

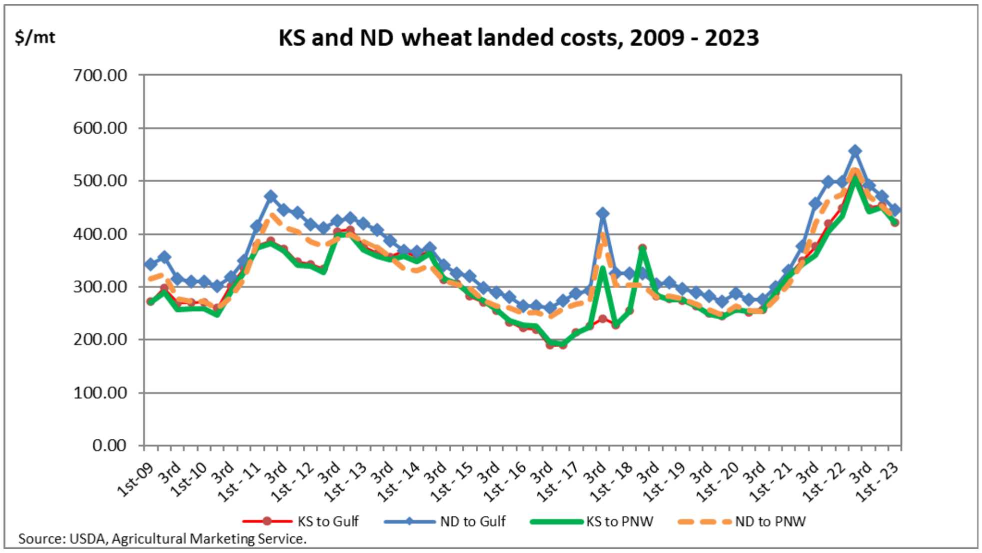
Ocean Freight and Trucking Rates

Quarter to quarter, ocean freight rates for shipping wheat to Japan via the PNW routes fell 17 percent and, via the Gulf routes, fell 13 percent (tables 1 and 2). This decrease was mainly due to a seasonal slowdown in market activity: holiday celebrations around the world resulted in lower demand (*Grain Transportation Report*, May 4, 2023). Year to year, ocean freight rates for all PNW and Gulf routes fell 26 percent. Quarter to quarter, trucking rates for transporting grain to a local elevator in both Kansas and North Dakota fell 10 percent, because of lower diesel prices. Year to year, trucking rates fell 12 percent.

Rail Tariff Rates

Quarter to quarter, rail tariff rates for shipping wheat to PNW were down 1 percent from both Kansas and North Dakota (tables 1 and 2). Year to year, rail rates to PNW rose 5 percent from Kansas and rose 15 percent from North Dakota. Quarter to quarter, rail rates to the Gulf were down 1 percent from both Kansas and North Dakota. Year to year, rail rates for shipping wheat to the Gulf were up 4 percent from Kansas and up 16 percent from North Dakota.

Total Landed Costs



Source: USDA, Agricultural Marketing Service.

Quarter to quarter, total landed costs for shipping wheat to Japan fell 7 percent via the KS-PNW and KS-Gulf routes, as Kansas farm values fell (tables 1 and 2). Year to year, landed costs decreased 4 percent for the KS-PNW route and fell 6 percent for the KS-Gulf route, mainly because of lower ocean and truck freight rates, but also because of lower farm values. Quarter to quarter, total landed costs were down 5 percent for the ND-PNW route and down 6 percent for the ND-Gulf route, reflecting lower ocean and truck rates as well as lower farm values. Year to year, landed costs decreases of 10 percent for the ND-PNW route and 11 percent for the ND-Gulf route reflected lower trucking and ocean rates, as well as lower farm values.

The figure shows landed costs for wheat for each route over time. First-quarter 2023 total landed costs for shipping wheat via the PNW and Gulf routes ranged from $421 per mt to $446 per mt. First-quarter Kansas transportation costs represented 26 percent of total landed costs for the KS-PNW and KS-Gulf routes—this share was down quarter to quarter for the KS-Gulf route and down from year to year for both routes. First-quarter North Dakota wheat transportation costs represented 26 percent of total landed costs for the ND-PNW route and 28 percent for the ND-Gulf route, both of which were down from the previous quarter and up from last year.

Export Projections

According to USDA's Federal Grain Inspection Service, first-quarter 2023 inspections of wheat for export to Japan totaled 0.586 million metric tons (mmt)—up 53 percent from quarter to quarter and down 5 percent year to year. First-quarter 2023 wheat exports to Japan represented 12 percent of total estimated U.S. wheat exports for the year (USDA, Federal Grain and Inspection Service). Current year-to-date outstanding (unshipped) export balances of wheat were up 17 percent from same time in 2022 while cumulative (shipped) exports were down 5 percent from the same time in 2022 (***GTR* table 11**). According to USDA's May *World Agricultural Supply and Demand Estimates (WASDE)* report, U.S. wheat exports for marketing year, (MY) 2023/24, are projected to be 19.73 mmt, down 6 percent from MY 2022/23 estimates (21.09 mmt).

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Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
05/17/23	262	323	238	160	229	202
05/10/23	263	323	240	159	238	213

[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 due to holiday.

Source: USDA, Agricultural Marketing Service.

Table 2

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

Commodity	Origin–destination	5/12/2023	5/5/2023
Corn	IL–Gulf	-0.75	-0.94
Corn	NE–Gulf	-0.56	-0.73
Soybean	IA–Gulf	-0.97	-1.11
HRW	KS–Gulf	-1.60	-1.90
HRS	ND–Portland	-1.86	-1.95

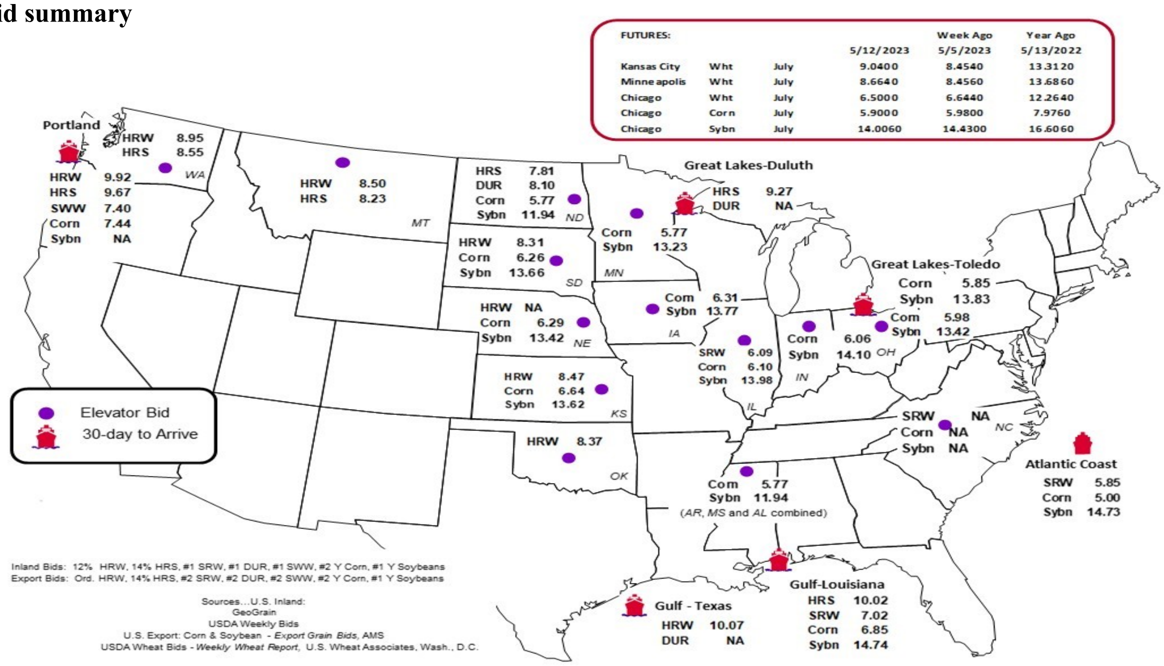
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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

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

For the week ending:	East		West			U.S. total	Canada	
5/6/2023	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,944	2,631	9,244	1,089	6,792	21,700	3,466	3,978
This week last year	1,593	2,636	11,926	931	5,348	22,434	3,150	3,485
2023 YTD	36,484	47,929	176,924	23,501	104,585	389,423	90,954	84,089
2022 YTD	33,251	42,088	209,532	22,237	107,368	414,476	63,000	66,909
2023 YTD as % of 2022 YTD	110	114	84	106	97	94	144	126
Last 4 weeks as % of 2022*	112	111	86	117	117	100	132	140
Last 4 weeks as % of 3-yr. avg.**	110	108	81	117	104	93	106	99
Total 2022	93,313	130,399	570,232	66,338	296,945	1,157,227	214,203	214,010

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

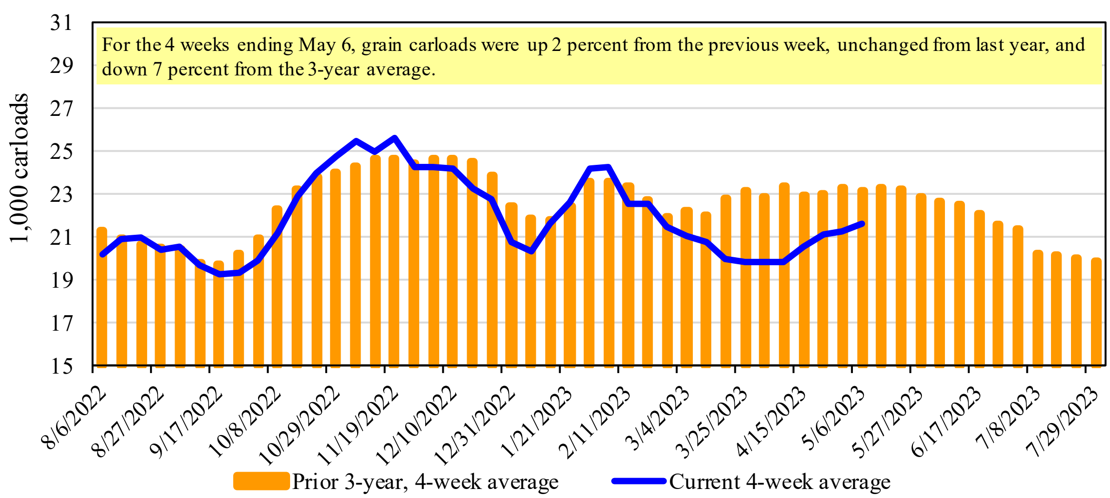
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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

Source: Association of American Railroads.

Figure 2

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 4

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

For the week ending: 5/11/2023		Delivery period: May-23	May-22	Jun-23	Jun-22	Jul-23	Jul-22	Aug-23	Aug-22
BNSF[3]	COT grain units	no offer	no offer	no offer	no offer	no bids	no bids	no bids	no bids
	COT grain single-car	no offer	no offer	0	no offer	no bids	0	no bids	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 offer	no offer	no offer	no offer	no offer	n/a	n/a

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

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

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

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

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

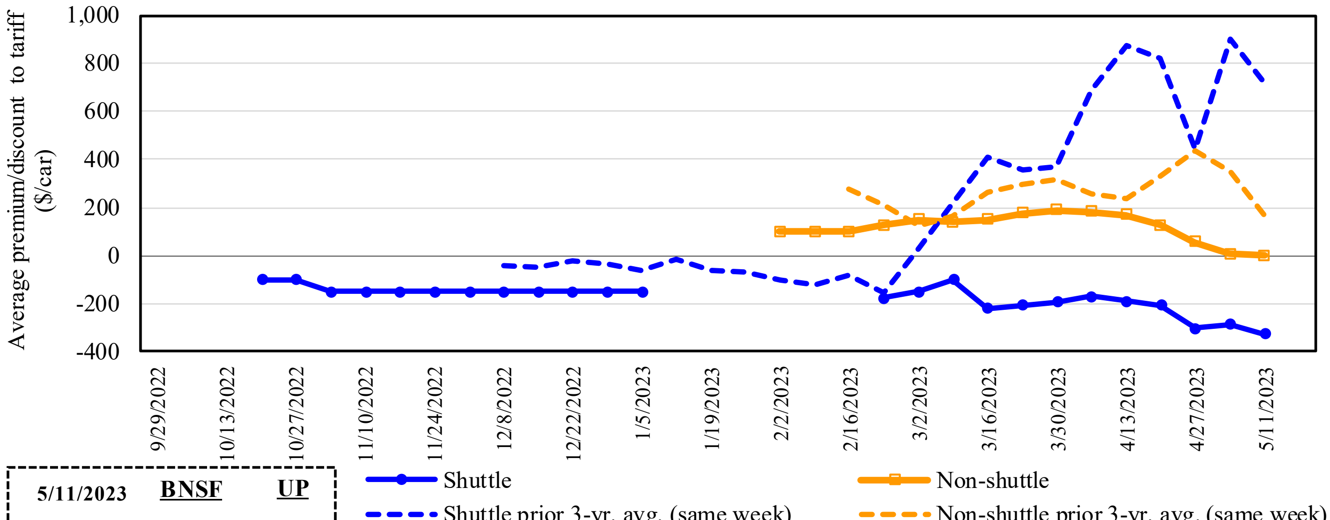
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: USDA, Agricultural Marketing Service.

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

Figure 3

Secondary market bids/offers for railcars to be delivered in May 2023



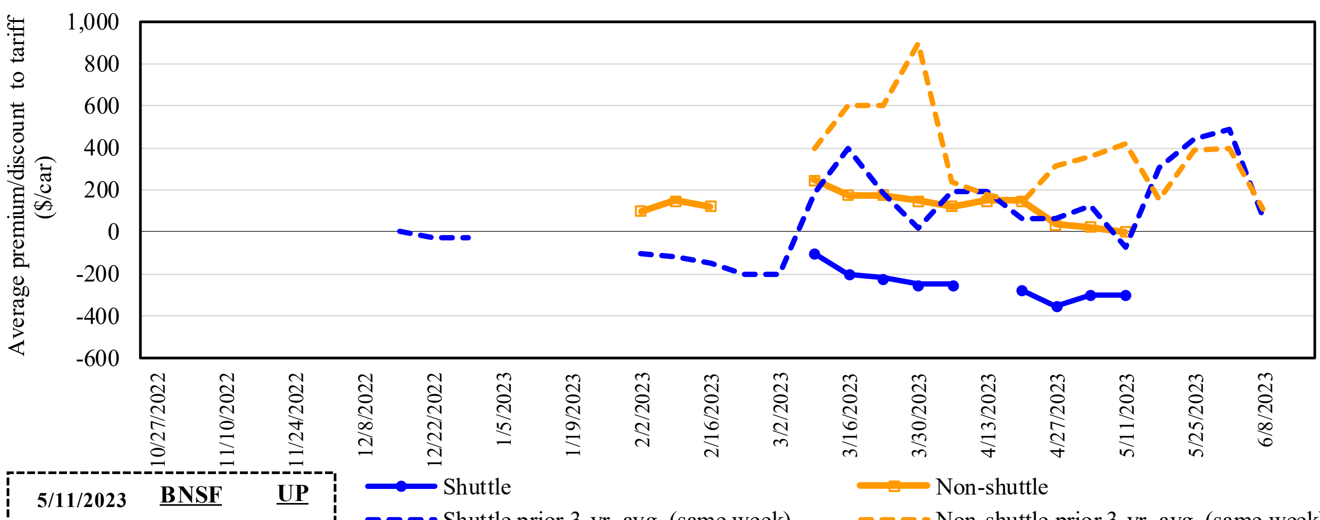
5/11/2023	BNSF	UP
Non-shuttle	$0	n/a
Shuttle	-$203	-$450

Average non-shuttle bids/offers fell $6 this week, and are $188 below the peak.
Average shuttle bids/offers fell $41 this week and are $227 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 4

Secondary market bids/offers for railcars to be delivered in June 2023



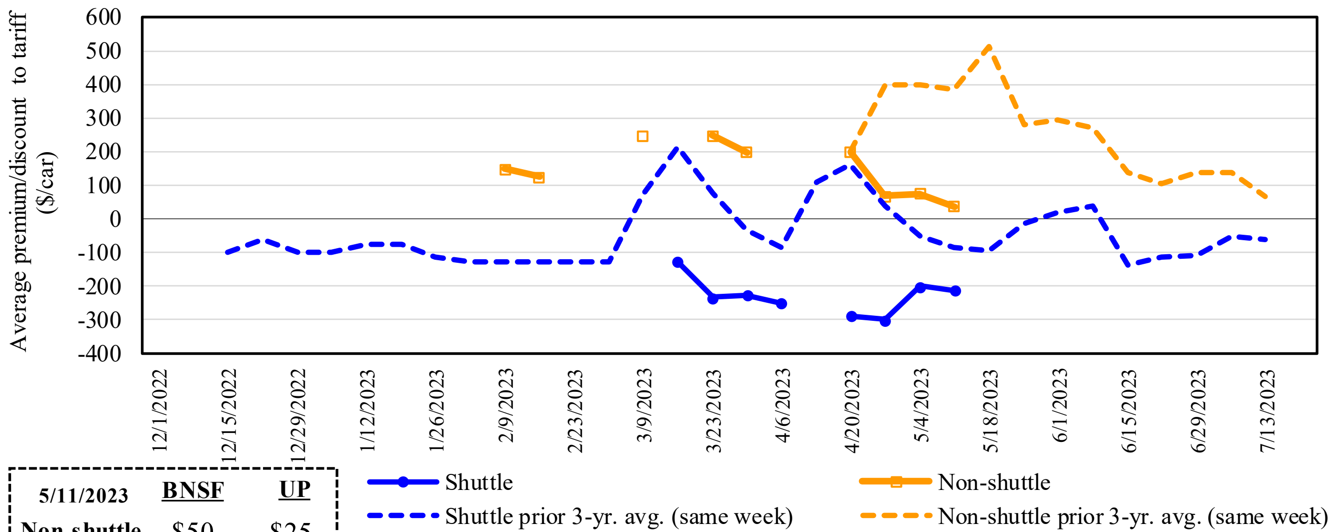
5/11/2023	BNSF	UP
Non-shuttle	$50	-$50
Shuttle	n/a	-$300

Average non-shuttle bids/offers fell $25 this week, and are $250 below the peak.
Average shuttle bids/offers are unchanged this week and are $200 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

Secondary market bids/offers for railcars to be delivered in July 2023



5/11/2023	BNSF	UP
Non-shuttle	$50	$25
Shuttle	-$225	-$200

Average non-shuttle bids/offers fell $38 this week, and are $213 below the peak.
Average shuttle bids/offers fell $13 this week and are $88 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 5

Weekly secondary railcar market ($/car)[1]

For the week ending: 5/11/2023		Delivery period					
		May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23
Non-shuttle	**BNSF-GF**	**0**	**50**	**50**	**n/a**	**n/a**	**n/a**
	Change from last week	(13)	0	0	n/a	n/a	n/a
	Change from same week 2022	(250)	(350)	(150)	n/a	n/a	n/a
	UP-Pool	**n/a**	**(50)**	**25**	**50**	**n/a**	**n/a**
	Change from last week	n/a	(50)	(75)	(50)	n/a	n/a
	Change from same week 2022	n/a	(1,100)	(825)	(200)	n/a	n/a
Shuttle	**BNSF-GF**	**(203)**	**n/a**	**(225)**	**n/a**	**(213)**	**n/a**
	Change from last week	(94)	n/a	n/a	n/a	(46)	n/a
	Change from same week 2022	(803)	n/a	(275)	n/a	(313)	n/a
	UP-Pool	**(450)**	**(300)**	**(200)**	**(200)**	**(50)**	**n/a**
	Change from last week	13	0	0	0	50	n/a
	Change from same week 2022	(4,700)	n/a	n/a	n/a	n/a	n/a
	CP-GF	**(100)**	**(100)**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	0	0	n/a	n/a	n/a	n/a
	Change from same week 2022	(400)	(300)	n/a	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week.

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; a red number in parentheses indicates a negative number; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad; CP = Canadian Pacific Railway.

Data from The Malsam Co., Tradewest Brokerage Co.

Source: USDA, Agricultural Marketing Service.

Table 6

Tariff rail rates for unit and shuttle train shipments[1]

May 2023	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	$218	$38.85	$1.06	-2
	Grand Forks, ND	Duluth-Superior, MN	$3,858	$75	$39.05	$1.06	4
	Wichita, KS	Los Angeles, CA	$7,490	$383	$78.18	$2.13	-2
	Wichita, KS	New Orleans, LA	$4,600	$383	$49.48	$1.35	0
	Sioux Falls, SD	Galveston-Houston, TX	$7,226	$314	$74.88	$2.04	-1
	Colby, KS	Galveston-Houston, TX	$4,850	$419	$52.33	$1.42	-1
	Amarillo, TX	Los Angeles, CA	$5,121	$584	$56.65	$1.54	-4
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$433	$44.02	$1.12	-4
	Toledo, OH	Raleigh, NC	$8,551	$482	$89.70	$2.28	3
	Des Moines, IA	Davenport, IA	$2,655	$92	$27.27	$0.69	4
	Indianapolis, IN	Atlanta, GA	$6,593	$362	$69.06	$1.75	3
	Indianapolis, IN	Knoxville, TN	$5,564	$234	$57.58	$1.46	4
	Des Moines, IA	Little Rock, AR	$4,250	$269	$44.88	$1.14	3
	Des Moines, IA	Los Angeles, CA	$6,130	$784	$68.66	$1.74	-1
Soybeans	Minneapolis, MN	New Orleans, LA	$4,242	$648	$48.56	$1.32	-9
	Toledo, OH	Huntsville, AL	$7,037	$343	$73.29	$1.99	3
	Indianapolis, IN	Raleigh, NC	$7,843	$488	$82.73	$2.25	3
	Indianapolis, IN	Huntsville, AL	$5,689	$232	$58.80	$1.60	4
	Champaign-Urbana, IL	New Orleans, LA	$4,865	$433	$52.61	$1.43	0
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,393	$220	$45.81	$1.25	0
	Wichita, KS	Galveston-Houston, TX	$4,311	$171	$44.51	$1.21	-5
	Chicago, IL	Albany, NY	$7,090	$455	$74.92	$2.04	3
	Grand Forks, ND	Portland, OR	$6,051	$380	$63.86	$1.74	-2
	Grand Forks, ND	Galveston-Houston, TX	$5,399	$396	$57.54	$1.57	-2
	Colby, KS	Portland, OR	$5,923	$688	$65.65	$1.79	-4
Corn	Minneapolis, MN	Portland, OR	$5,660	$463	$60.80	$1.54	-2
	Sioux Falls, SD	Tacoma, WA	$5,620	$424	$60.02	$1.52	-2
	Champaign-Urbana, IL	New Orleans, LA	$4,170	$433	$45.71	$1.16	2
	Lincoln, NE	Galveston-Houston, TX	$4,360	$247	$45.75	$1.16	1
	Des Moines, IA	Amarillo, TX	$4,670	$338	$49.74	$1.26	2
	Minneapolis, MN	Tacoma, WA	$5,660	$459	$60.76	$1.54	-2
	Council Bluffs, IA	Stockton, CA	$5,580	$475	$60.13	$1.53	-2
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,350	$424	$67.27	$1.83	-1
	Minneapolis, MN	Portland, OR	$6,400	$463	$68.15	$1.85	-2
	Fargo, ND	Tacoma, WA	$6,250	$377	$65.81	$1.79	0
	Council Bluffs, IA	New Orleans, LA	$5,095	$499	$55.55	$1.51	0
	Toledo, OH	Huntsville, AL	$5,277	$343	$55.81	$1.52	3
	Grand Island, NE	Portland, OR	$5,730	$704	$63.89	$1.74	2

[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 7

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

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
Date: December 2021							
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

[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.

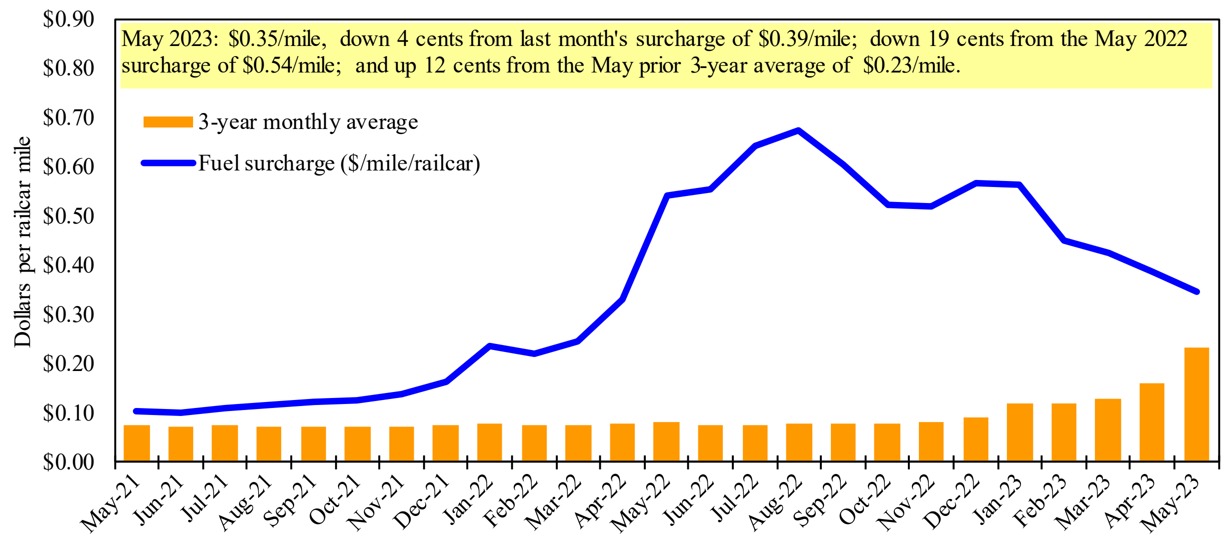
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[5] As of January 1, 2022, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico. As we incorporate the change, Table 7 updates will be delayed.

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

Figure 6

Railroad fuel surcharges, North American weighted average[1]

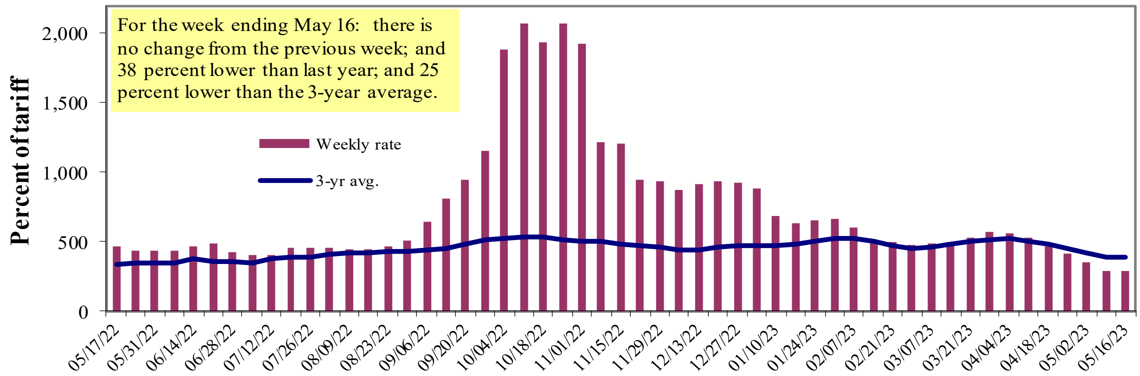


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

Barge Transportation

Figure 7
Illinois River barge freight rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
Source: USDA, Agricultural Marketing Service.

Table 8
Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	5/16/2023	445	343	288	226	261	261	225
	5/9/2023	448	387	287	223	271	271	231
$/ton	5/16/2023	27.55	18.25	13.36	9.02	12.24	10.54	7.07
	5/9/2023	27.73	20.59	13.32	8.90	12.71	10.95	7.25
Current week % change from the same week:								
	Last year	-22	-33	-38	-34	-42	-42	-32
	3-year avg. [2]	-6	-17	-25	-19	-18	-18	-13
Rate[1]	June	438	346	302	228	265	265	227
	August	509	439	431	377	409	409	363

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

Figure 8
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

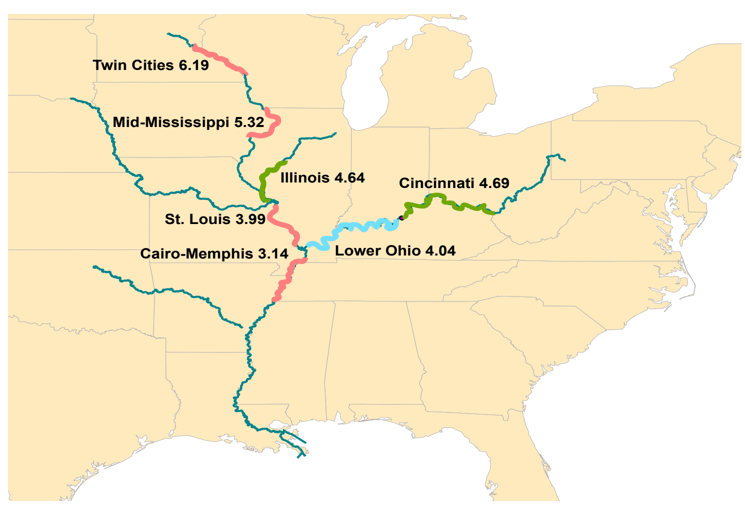
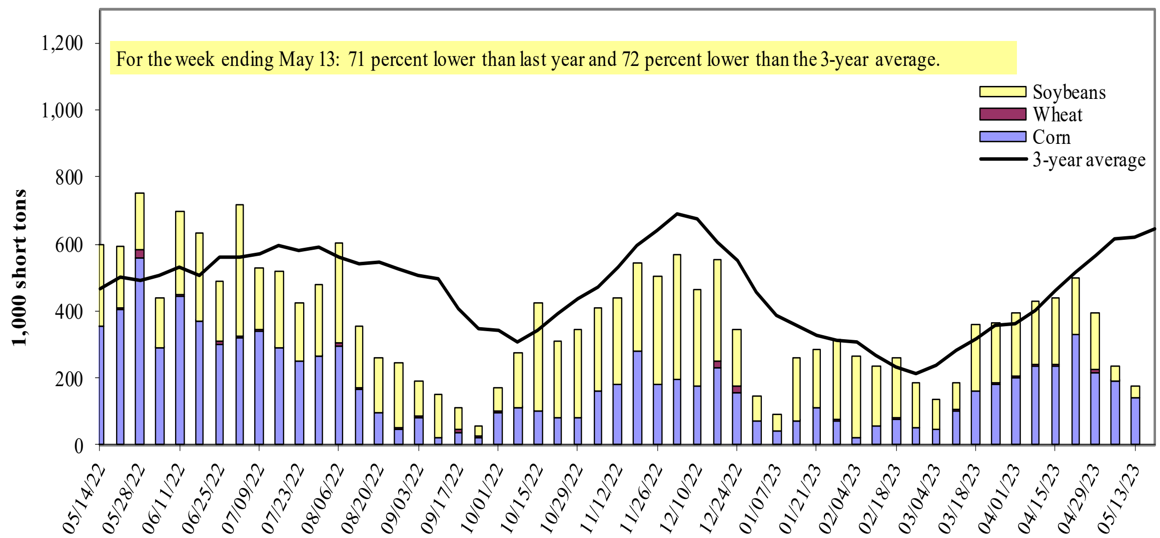


Figure 9

Barge movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



[1] The 3-year average is a 4-week moving 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.

Table 9

Barged grain movements (1,000 tons)

For the week ending 05/13/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	42	0	14	0	56
Winfield, MO (L25)	30	0	10	0	40
Alton, IL (L26)	125	0	35	0	159
Granite City, IL (L27)	139	0	35	0	174
Illinois River (La Grange)	92	0	20	0	112
Ohio River (Olmsted)	86	2	7	0	95
Arkansas River (L1)	1	18	4	0	24
Weekly total - 2023	227	20	46	0	293
Weekly total - 2022	467	24	343	2	836
2023 YTD[1]	5,122	505	4,884	152	10,663
2022 YTD[1]	7,454	612	4,605	125	12,795
2023 as % of 2022 YTD	69	83	106	122	83
Last 4 weeks as % of 2022[2]	59	89	55	54	59
Total 2022	16,437	1,594	14,464	232	32,727

[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.

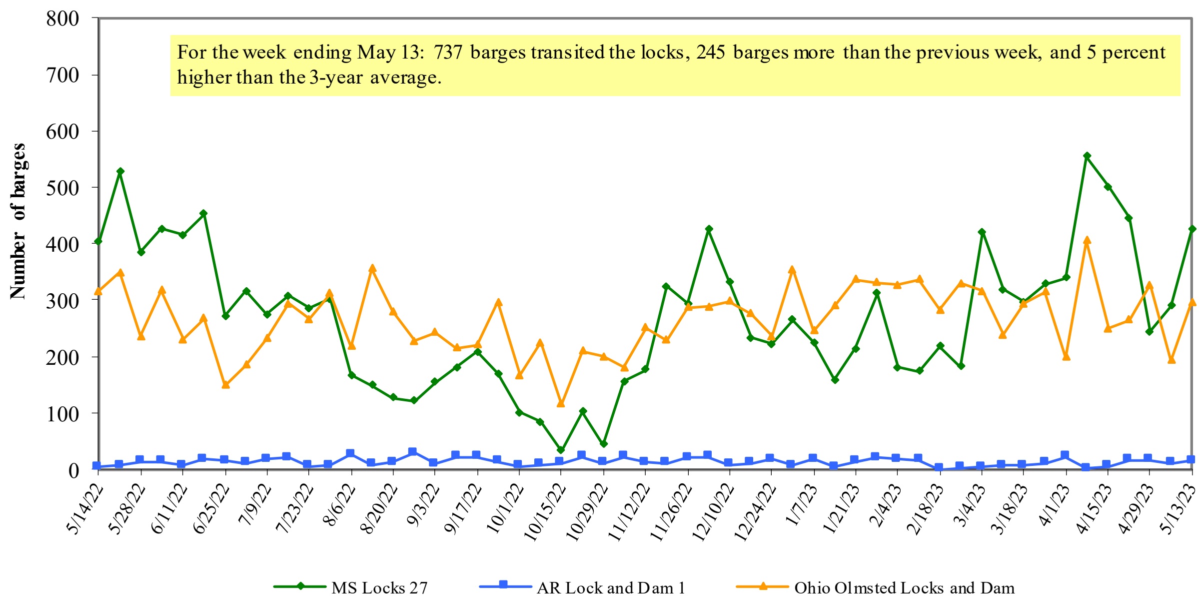
[2] As a percent of same period in 2022.

Note: L (as in "L15") refers to a lock, locks, or locks 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 10

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

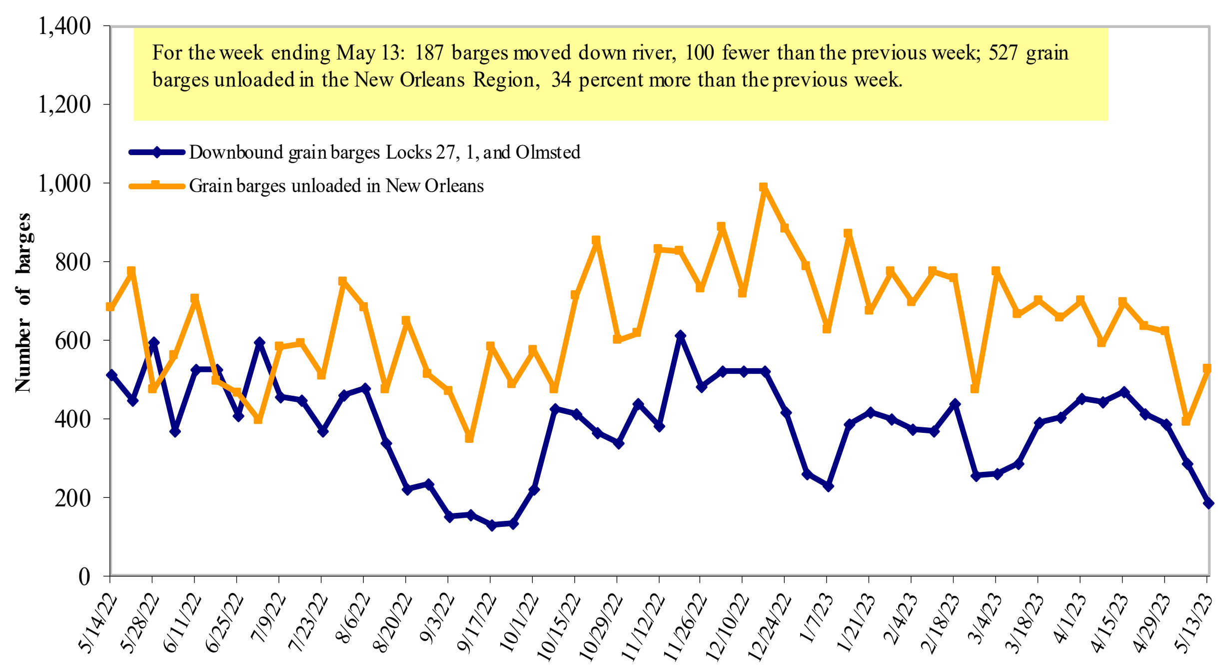


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Figure 11

Grain barges for export in New Orleans region



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.

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 10

Retail on-highway diesel prices, week ending 5/15/2023 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.932	-0.054	-2.012
	New England	4.243	-0.131	-2.188
	Central Atlantic	4.238	-0.051	-2.122
	Lower Atlantic	3.787	-0.047	-1.818
II	Midwest	3.823	-0.004	-1.523
III	Gulf Coast	3.593	-0.020	-1.702
IV	Rocky Mountain	4.089	-0.016	-1.379
V	West Coast	4.588	-0.042	-1.487
	West Coast less California	4.382	-0.056	-1.237
	California	4.825	-0.022	-1.652
Total	United States	3.897	-0.025	-1.716

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

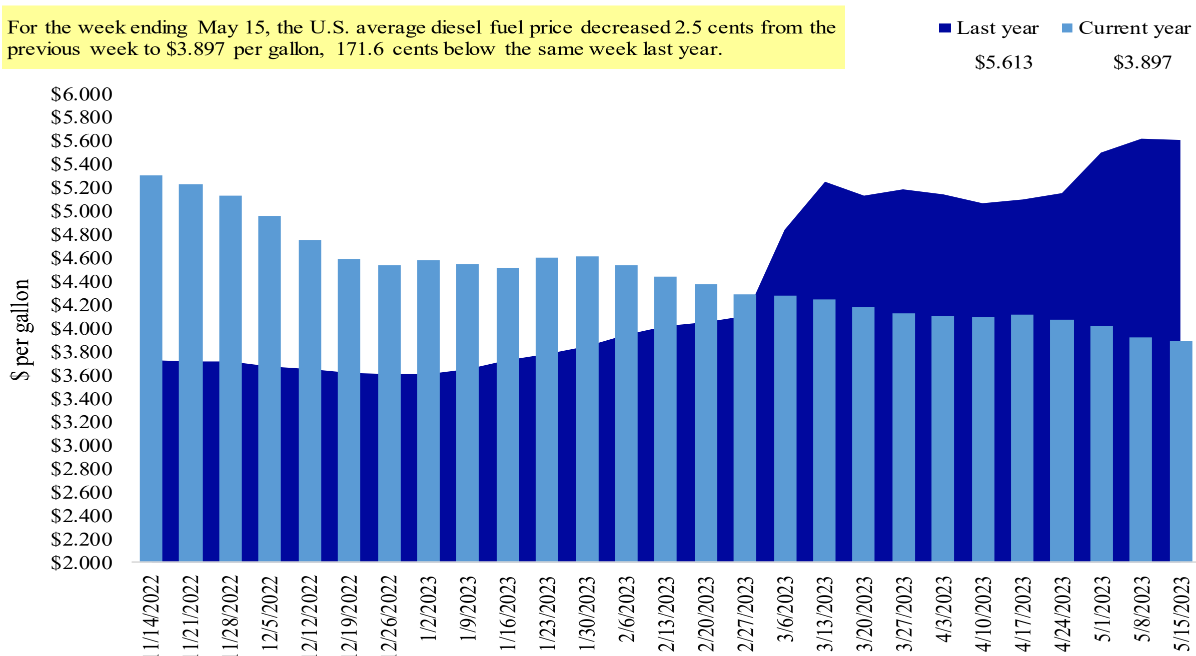
Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

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

Figure 12

Weekly diesel fuel prices, U.S. average

For the week ending May 15, the U.S. average diesel fuel price decreased 2.5 cents from the previous week to $3.897 per gallon, 171.6 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, Retail On-Highway Diesel Prices.

Grain Exports

Table 11

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]									
5/4/2023	483	368	729	549	113	2,241	11,877	3,285	17,403
This week year ago	751	224	644	296	1	1,916	16,950	10,692	29,558
Cumulative exports-marketing year[2]									
2022/23 YTD	4,637	2,560	5,023	4,127	340	16,687	26,517	47,481	90,685
2021/22 YTD	6,759	2,651	4,816	3,093	196	17,514	41,541	47,764	106,818
YTD 2022/23 as % of 2021/22	69	97	104	133	174	95	64	99	85
Last 4 wks. as % of same period 2021/22	75	172	126	197	21,520	128	81	35	67
Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622
Total 2020/21	8,422	1,790	7,500	6,438	656	24,807	66,958	60,571	152,335

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

[2] Shipped export sales to date.

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 12

Top 5 importers[1] of U.S. corn

For the week ending 5/04/2023	Total commitments[2] 2023/24 current MY	2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -			-1,000 mt -
Mexico	1,829	13,966	15,699	(11)	15,227
China	272	8,036	14,636	(45)	12,616
Japan	473	5,620	8,979	(37)	10,273
Columbia	0	1,972	4,167	(53)	4,398
Korea	0	782	1,264	(38)	2,563
Top 5 importers	**2,574**	**30,376**	**44,745**	(32)	**45,077**
Total U.S. corn export sales	**2,626**	**38,394**	**58,491**	(34)	**56,665**
% of YTD current month's export projection	5%	85%	93%		
Change from prior week[2]	**83**	**257**	**193**		
Top 5 importers' share of U.S. corn export sales	98%	79%	76%		80%
USDA forecast May 2023	**53,435**	**45,165**	**62,875**	(28)	
Corn use for ethanol USDA forecast, May 2023	**134,620**	**133,350**	**135,281**	(1)	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; 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; YTD = year to date.

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

Source: USDA, Foreign Agricultural Service.

Table 13

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

For the week ending 5/04/2023	Total commitments[2] 2023/24 current MY	2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -			-1,000 mt -
China	864	31,173	30,051	4	27,283
Mexico	19	4,340	5,115	(15)	4,929
Egypt	0	1,106	3,725	(70)	3,553
Japan	53	2,062	2,108	(2)	2,266
Indonesia	89	1,368	1,473	(7)	2,116
Top 5 importers	**1,025**	**40,048**	**42,472**	(6)	**40,147**
Total U.S. soybean export sales	**1,887**	**50,766**	**58,456**	(13)	**54,231**
% of projected exports	4%	92%	99%		
change from prior week[2]	**50**	**62**	**144**		
Top 5 importers' share of U.S. soybean export sales	54%	79%	73%		**74%**
USDA forecast, May 2023	**53,815**	**54,905**	**58,801**	(7)	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; 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; YTD = year to date.

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

Source: USDA, Foreign Agricultural Service.

Table 14

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

For the week ending 5/04/2023	Total commitments[2] 2023/24 next MY	2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -			-1,000 mt -
Mexico	349	3,271	3,767	(13)	3,566
Philippines	221	2,235	2,782	(20)	2,985
Japan	92	2,248	2,349	(4)	2,453
China	0	1,099	848	30	1,537
Nigeria	50	767	1,736	(56)	1,528
Korea	121	1,335	1,257	6	1,459
Taiwan	18	848	951	(11)	1,106
Indonesia	0	345	122	183	711
Thailand	48	636	558	14	703
Colombia	24	527	730	(28)	621
Top 10 importers	**922**	**13,311**	**15,100**	(12)	**16,669**
Total U.S. wheat export sales	**1,626**	**18,929**	**19,430**	(3)	**22,763**
% of projected exports	8%	90%	89%		
change from prior week[2]	**334**	**26**	**14**		
Top 10 importers' share of U.S. wheat export sales	57%	70%	78%		73%
USDA forecast, May 2023	**19,755**	**21,117**	**21,798**	(3)	

[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 ranking 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 15

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

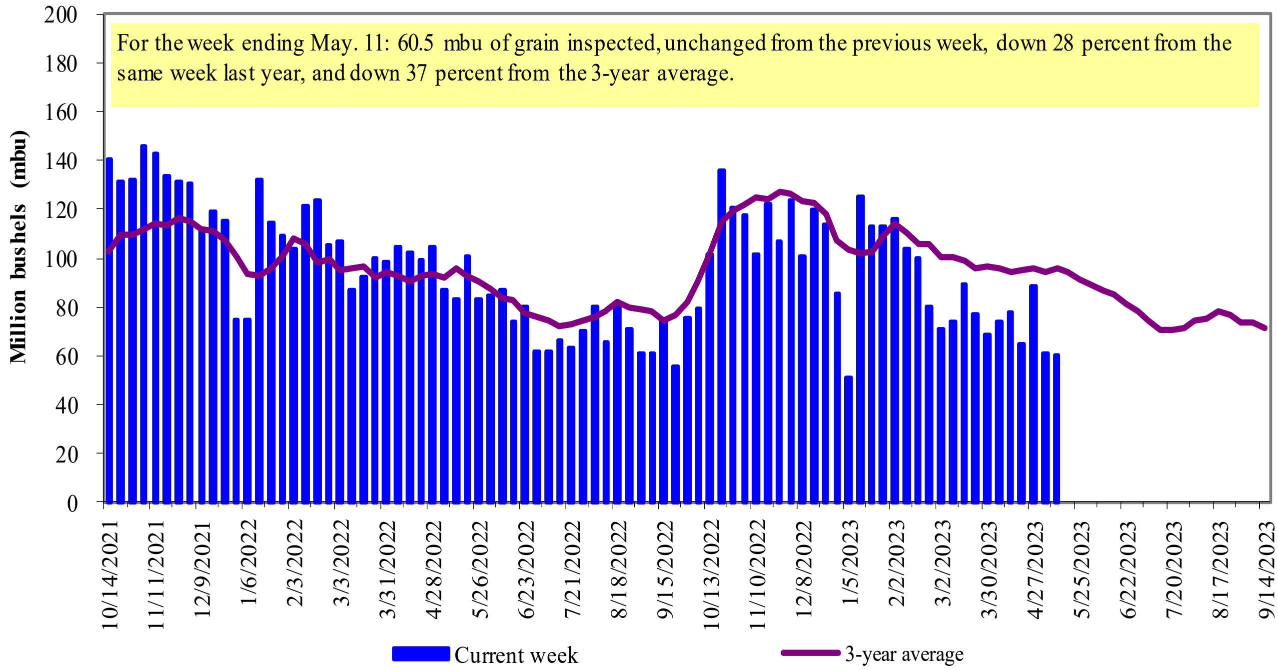
Port regions	For the week ending 05/11/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2022 total*
Pacific Northwest									
Wheat	111	67	165	3,901	3,521	111	114	46	9,836
Corn	396	267	148	2,496	5,366	47	77	69	9,615
Soybeans	11	69	16	3,521	4,264	83	36	38	14,178
Total	**518**	**404**	**128**	**9,919**	**13,151**	**75**	**80**	**59**	**33,629**
Mississippi Gulf									
Wheat	29	28	101	1,066	1,520	70	71	74	4,053
Corn	581	491	118	9,890	16,292	61	75	72	30,781
Soybeans	35	261	13	12,211	9,933	123	61	89	31,283
Total	**644**	**780**	**83**	**23,168**	**27,746**	**84**	**71**	**76**	**66,116**
Texas Gulf									
Wheat	61	54	114	1,007	1,271	79	94	109	3,421
Corn	0	20	0	88	257	34	47	28	648
Soybeans	0	0	n/a	52	2	n/a	n/a	0	685
Total	**61**	**74**	**83**	**1,147**	**1,530**	**75**	**89**	**94**	**4,754**
Interior									
Wheat	42	75	57	967	1,069	90	106	102	2,912
Corn	151	180	84	3,483	3,414	102	95	93	8,961
Soybeans	98	76	128	2,576	2,787	92	63	70	7,109
Total	**291**	**331**	**88**	**7,026**	**7,270**	**97**	**85**	**86**	**18,982**
Great Lakes									
Wheat	12	0	n/a	91	84	107	22	12	395
Corn	23	0	n/a	23	39	58	105	316	158
Soybeans	0	0	n/a	31	133	23	0	0	760
Total	**34**	**0**	**n/a**	**144**	**256**	**56**	**22**	**25**	**1,312**
Atlantic									
Wheat	0	2	16	43	37	116	16	47	169
Corn	3	0	n/a	58	86	67	85	135	309
Soybeans	12	12	99	1,144	1,202	95	21	45	2,867
Total	**15**	**13**	**110**	**1,245**	**1,326**	**94**	**24**	**53**	**3,345**
U.S. total from ports*									
Wheat	255	226	113	7,075	7,503	94	92	64	20,786
Corn	1,153	958	120	16,039	25,455	63	78	74	50,471
Soybeans	156	419	37	19,535	18,322	107	54	74	56,882
Total	**1,564**	**1,602**	**98**	**42,649**	**51,279**	**83**	**74**	**72**	**128,139**

*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.

Figure 13

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

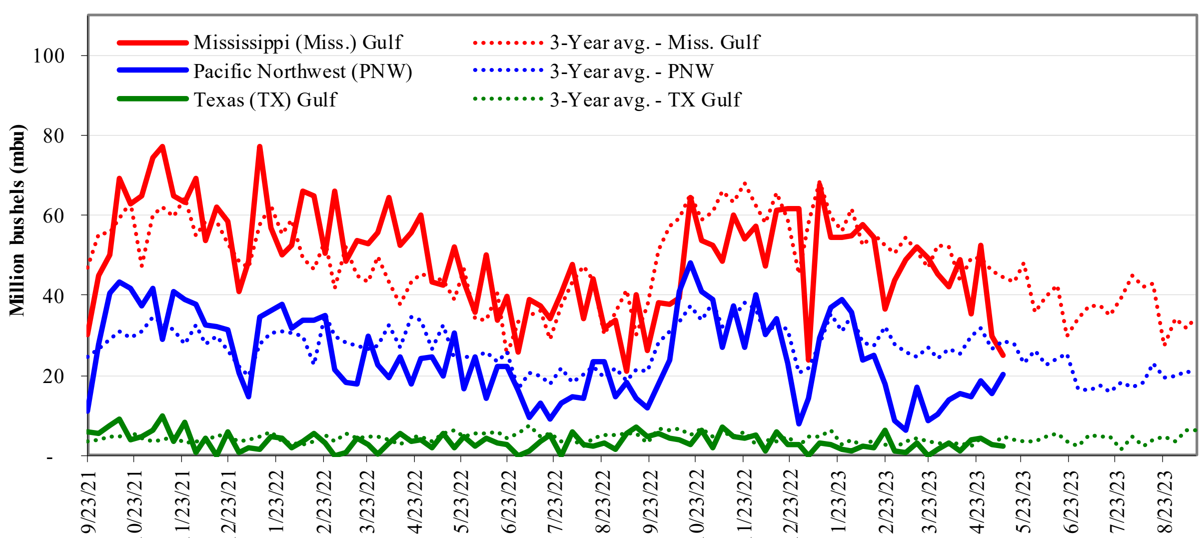


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 05/11/23 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	25.2	Last wk:	down 16	down 19	down 16	up 29
PNW:	20.1	Last Year (same wk):	down 41	down 60	down 43	unchanged
TX Gulf:	2.3	3-yr avg. (4-wk. mov. Avg):	down 47	down 37	down 46	down 31

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

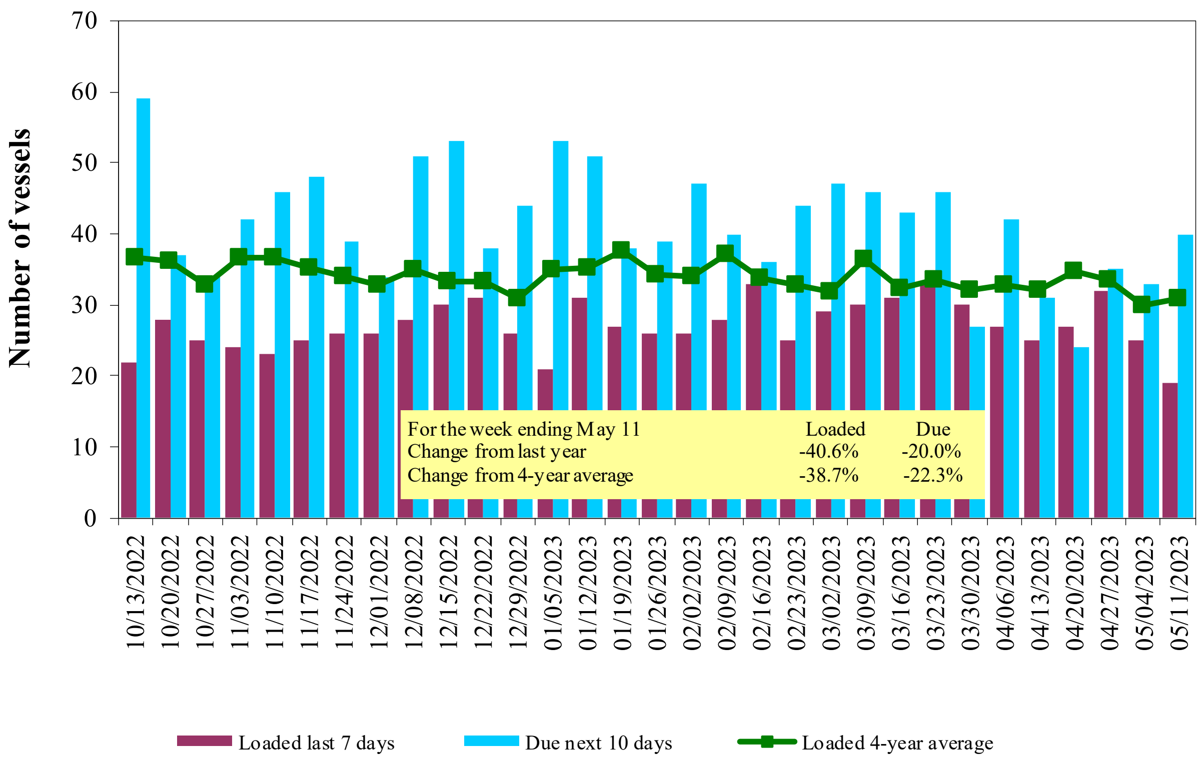
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
5/11/2023	14	19	40	13
5/4/2023	8	25	33	12
2022 range	(14…61)	(18…39)	(28...62)	(5…23)
2022 average	30	28	44	13

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

Figure 15

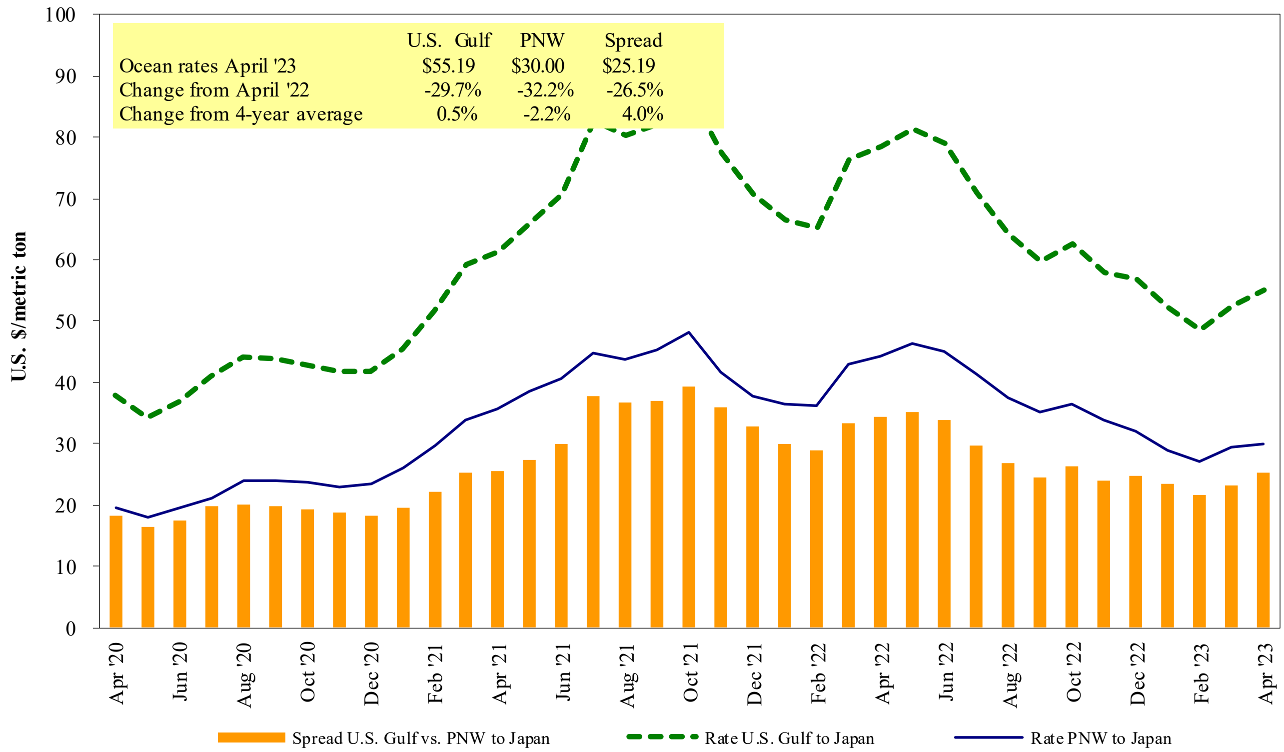
U.S. Gulf[1] vessel loading activity



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

Figure 16

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 17

Ocean freight rates for selected shipments, week ending 05/13/2023

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	May 2, 2023	50,000	56.70
U.S. Gulf	Japan	Heavy grain	May 1, 2023	50,000	54.80
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
U.S. Gulf	S. China	Corn	Aug 1/10, 2022	68,000	71.00
U.S. Gulf	Kenya	Sorghum	Feb 15/25, 2023	22,820	63.30*
U.S. Gulf	Djibouti	Wheat	Nov 5/15, 2022	22,500	102.88*
PNW	N. China	Heavy grain	Apr 21/27, 2023	63,000	28.00
PNW	N. China	Heavy grain	May 1/4, 2023	66,000	29.00
WC US	Japan	Wheat	Feb 1/Mar 1, 2023	34,500	47.75
Brazil	S. Korea	Heavy grain	Jun 15/Jul 15, 2023	68,000	45.15
Brazil	S. Korea	Soybean Meal	Jun 1, 2023	60,000	53.75
Brazil	China	Heavy grain	Jul 1/31, 2023	63,000	41.50
Brazil	China	Heavy grain	May 5/10, 2023	65,000	36.50
Brazil	N. China	Heavy grain	Apr 21/30, 2023	66,000	40.60
Brazil	Vietnam	Heavy grain	Apr 11/29, 2023	66,000	37.00
Australia	Vietnam	Heavy grain	Feb 24/Apr 9, 2023	60,000	20.80

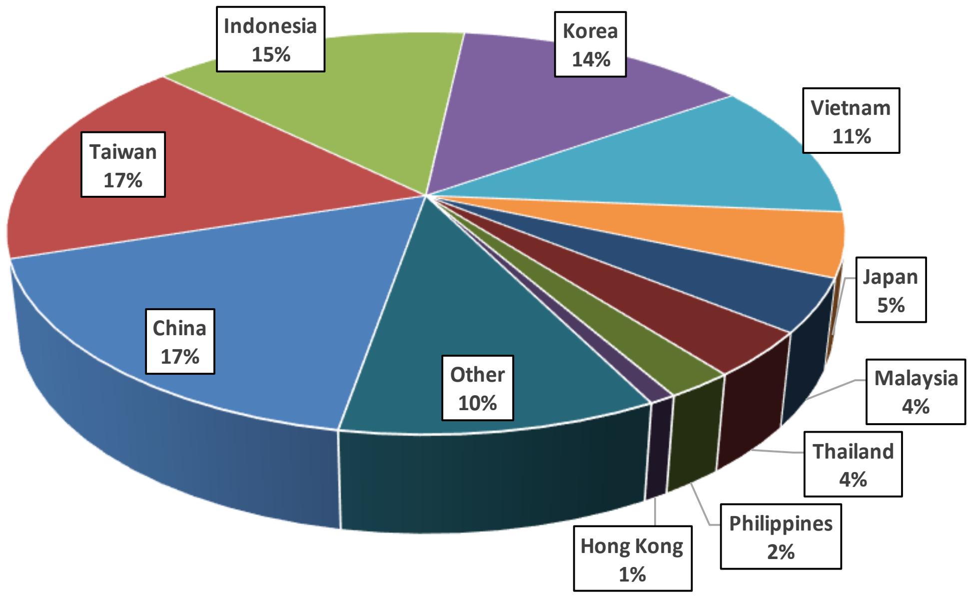
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

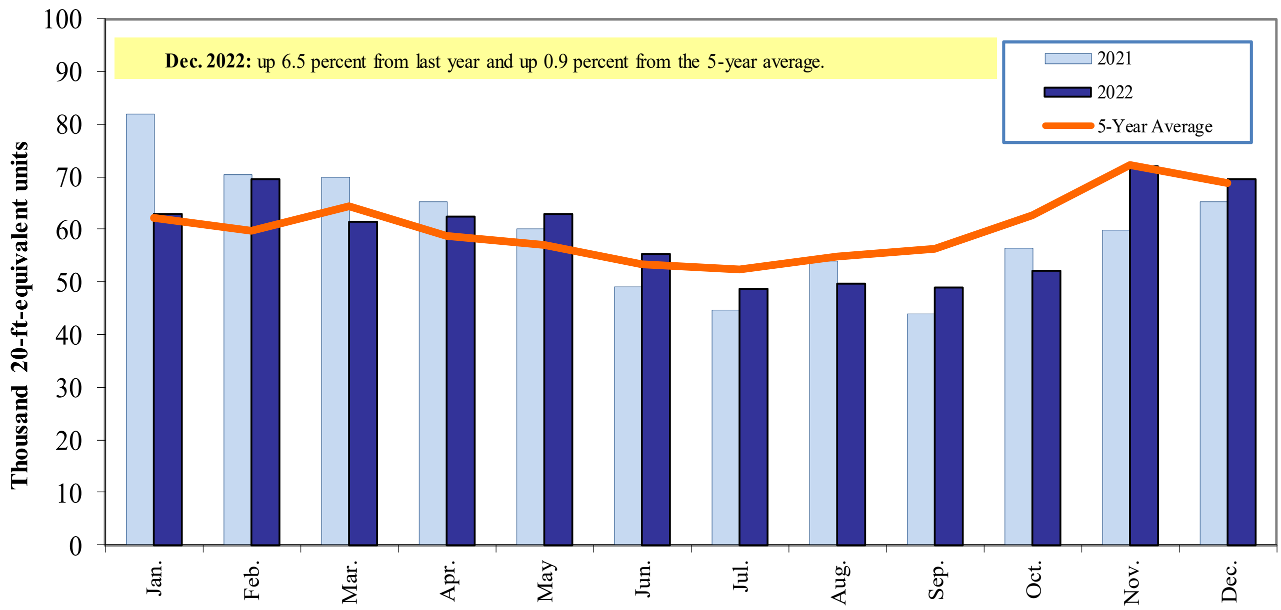
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2022



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

Figure 18
Monthly shipments of U.S. containerized grain exports



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

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