United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contents

The next release is June 1, 2023

WEEKLY HIGHLIGHTS

Panama Canal Imposes Draft Limits Due to Low Water Conditions

Persistent drought conditions in Panama have forced the Panama Canal Authority to implement, since early April, a series of draft reductions for large vessel transits. As of May 24, the normal draft restriction within the Panama Canal's Neopanamax locks (50 feet) had been reduced to 44.5 feet, and further reductions are expected. Some container ocean carriers have imposed per container surcharges for services transiting the canal, or suggested that customers use alternative vessel services until conditions recover. During June and July, from 2018 to 2022, U.S. agricultural exporters moved an average of more than 38,000 20-foot-equivalent units (TEUs) from East Coast ports to Northeast and Southeast Asia. Many East Coast and Gulf Coast exporters rely on the Panama Canal for a faster transit time to Asia than the alternatives around Cape Horn, or eastbound through the Suez Canal.

EPA Seeks Information on Heavy-Vehicle Technology To Assist Ports

On May 5, the U.S. Environmental Protection Agency (EPA) issued a technical request for information (RFI) on zero-emissions heavy-duty vehicles and port equipment. The RFI is for EPA's Clean Ports and Clean Heavy-Duty Vehicles Programs, which combined, will receive $4 billion through the Inflation Reduction Act of 2022. These programs support critical clean technologies and practices at ports and aid collaboration among the port industry, communities, and all levels of government. The RFI seeks information on zero-emission port equipment (e.g., electric or fuel cell dray trucks, harbor craft, locomotives, and cargo handling equipment) and associated charging and other fueling infrastructure. Responses to the RFI are due by June 5.

FHWA Offers Grants To Reduce Truck Emissions at Ports

On April 27, the U.S. Department of Transportation's Federal Highway Administration (FHWA) rolled out its $400 million Reduction of Truck Emissions at Port Facilities Grant Program. The initial round of project funding—up to $160 million—is now open. Eligible projects include those that develop port-related infrastructure and on-truck technologies. The projects should aim to lower truck-idling emissions at ports, use zero/low-emission powertrains or fuels, or decrease truck congestion within/adjacent to ports through enhanced intermodal rail connections. Potential infrastructure-project locations include areas within or next to ports and intermodal port transfer facilities that ship freight between at least two transportation modes. Testing and evaluation projects can take place anywhere. FHWA expects to award 35 grants for projects, which will have a requirement for cost-sharing or matching contributions. The application deadline for the initial round of funding is June 26, 2023. The initial round will come from combined fiscal year 2022 and 2023 funds.

Nebraska and North Dakota Waive HOS Rules for Hauling Fuel and Fertilizer

On May 5, citing a shortened planting season and a regional fuel shortage, the Governors of Nebraska and North Dakota issued executive orders waiving hours-of-service (HOS) regulations for drivers hauling fuel and fertilizer. Nebraska's waiver (effective until June 4) extends drivers' work hours to haul diesel, biodiesel, gasoline or gasoline blends, fuel oil, ethanol and propane. North Dakota's waiver (effective for 30 days) waives HOS regulations for truckers hauling dry and liquid fertilizer, anhydrous ammonia, pesticides and seeds. Both orders stipulate that a motor carrier should not allow an ill or fatigued driver to operate a motor vehicle. Likewise, a driver who notifies a motor carrier that he or she needs immediate rest must be given at least 10 consecutive off-duty hours before returning to drive.

Snapshots by Sector

Export Sales

For the week ending May 11, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 15.55 million metric tons (mmt), down 11 percent from last week and down 45 percent from the same time last year. Net **corn export sales** for MY 2022/23 were −0.339, down significantly from last week. Net **soybean export sales** were 0.017 mmt, down 73 percent from last week. Net weekly **wheat export sales** were −0.042 mmt, down significantly from last week.

Rail

U.S. Class I railroads originated 18,818 **grain carloads** during the week ending May 13. This was a 9-percent decrease from the previous week, 10 percent less than last year, and 13 percent lower than the 3-year average.

Average June **shuttle secondary railcar bids/offers** (per car) were $231 below tariff for the week ending May 18. This was $69 more than last week and $1,488 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $19 below tariff. This was $19 less than last week, and $231 lower than this week last year.

Barge

For the week ending May 20, **barged grain movements** totaled 505,694 tons. This was 73 percent more than the previous week and 29 percent less than the same period last year.

For the week ending May 20, 321 grain barges **moved down river**—134 more than last week. There were 569 grain barges **unloaded** in the New Orleans region, 8 percent more than last week.

Ocean

For the week ending May 18, 22 **oceangoing grain vessels** were loaded in the Gulf—29 percent fewer than the same period last year. Within the next 10 days (starting May 19), 44 vessels were expected to be loaded—2 percent fewer than the same period last year.

As of May 18, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $51.00. This was unchanged from the previous week. The rate from the Pacific Northwest to Japan was $28.25 per mt, 1 percent less than the previous week.

Fuel

For the week ending May 22, the U.S. average **diesel fuel price** decreased 1.4 cents from the previous week to $3.883 per gallon, 168.8 cents below the same week last year.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* May 25, 2023.
Web: **http://dx.doi.org/10.9752/TS056.05-25-2023**

Feature Article/Calendar

Costs of Transporting Grain to Mexico Fell in First Quarter 2023

Because Mexico is a major importer of U.S. grain, low transportation and landed costs for U.S.-Mexico routes are vital to the competitiveness of U.S. grain in Mexico and globally. U.S. grain is transported to Mexico either by cross-border land movements or by sea movements to Mexican ports for inland distribution. This article examines the costs of transporting U.S. grain to Mexico over land to Guadalajara (land routes) and by sea to Veracruz (water routes), tracking changes over time (table 1).

Table 1. Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico

	Water route (to Veracruz) $/metric ton					Land route (to Guadalajara) $/metric ton				
	2022 1st qtr.	2022 4th qtr.	2023 1st qtr.	Percent change Yr. to yr.	Qtr. to qtr.	2022 1st qtr.	2022 4th qtr.	2023 1st qtr.	Percent change Yr. to yr.	Qtr. to qtr.
Corn										
Origin	**IL**					**IA**				
Truck	16.67	16.31	14.75	-11.5	-9.6	5.58	5.82	5.42	-2.9	-6.9
Rail [1]	-	-	-	-	-	100.08	116.30	115.97	15.9	-0.3
Barge	39.23	70.23	30.28	-22.8	-56.9	-	-	-	-	-
Ocean[2]	22.51	20.73	18.75	-16.7	-9.6	-	-	-	-	-
Total transportation cost	78.41	107.27	63.78	-18.7	-40.5	105.66	122.12	121.39	14.9	-0.6
Farm value[3]	241.59	250.51	257.99	6.8	3.0	241.46	258.78	266.00	10.2	2.8
Landed cost[4]	320.00	357.78	321.77	0.6	-10.1	347.12	380.90	387.39	11.6	1.7
Transport % of landed cost	25	30	20	-4.68	-10.16	30	32	31	0.90	-0.7
Soybeans										
Origin	**IL**					**NE**				
Truck	16.67	16.31	14.75	-11.5	-9.6	5.58	5.82	5.42	-2.9	-6.9
Rail	-	-	-	-	-	100.95	116.43	116.07	15.0	-0.3
Barge	39.23	70.23	30.28	-22.8	-56.9	-	-	-	-	-
Ocean	22.51	20.73	18.75	-16.7	-9.6	-	-	-	-	-
Total transportation cost	78.41	107.27	63.78	-18.7	-40.5	106.53	122.25	121.49	14.0	-0.6
Farm value	527.88	510.74	543.81	3.0	6.5	526.66	514.41	546.26	3.7	6.2
Landed cost	606.29	618.01	607.59	0.2	-1.7	633.19	636.66	667.75	5.5	4.9
Transport % of landed cost	13	17	10	-2.44	-6.86	17	19	18	1.37	-1.0
Wheat										
Origin	**KS**					**KS**				
Truck	5.58	5.82	5.42	-2.9	-6.9	5.58	5.82	5.42	-2.9	-6.9
Rail	43.80	45.96	45.58	4.1	-0.8	85.63	105.05	104.89	22.5	-0.2
Ocean	22.51	20.73	18.75	-16.7	-9.6	-	-	-	-	-
Total transportation cost	71.89	72.51	69.75	-3.0	-3.8	91.21	110.87	110.31	20.9	-0.5
Farm value	319.79	332.65	309.99	-3.1	-6.8	319.79	332.65	309.99	-3.1	-6.8
Landed cost	391.68	405.16	379.74	-3.0	-6.3	411.00	443.52	420.30	2.3	-5.2
Transport % of landed cost	18	18	18	0	0	22	25	26	4	1.2

[1]Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table. Due to tax changes in Mexico, all three Class I railroads that ship from the U.S. to Mexico (BNSF, Union Pacific, and Kansas City Southern) are only reporting rates to the border for interchange, called Rule 11 rates. Because comparable data were not available, it was assumed rail rates did not change from fourth quarter 2021 through first quarter 2023, but fuel surcharges were still updated.

[2]Source for ocean freight rates: O'Neil Commodity Consulting.

[3]Source for farm values: USDA, National Agricultural Statistics Service.

[4]Landed cost is total transportation cost plus farm value.

*The number was revised from what was previously published

Note: "-" indicates data not required or applicable. Total may not add exactly because of rounding.

Source: Compiled by the USDA, Agricultural Marketing Service.

Quarter-to-quarter transportation costs. From fourth quarter 2022 to first quarter 2023 (quarter to quarter), total transportation costs decreased for grain (corn, soybeans, and wheat) shipped by all water and land routes. Falling transportation costs reflected lower truck, barge, rail (public tariff, plus fuel surcharge), and ocean freight rates.[1]

[1] Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

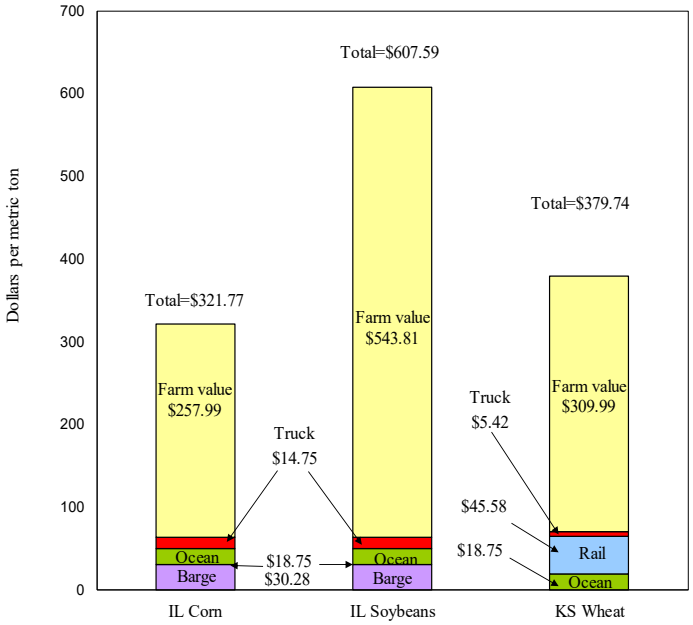
Lower-than-normal grain inspections and export sales softened demand for barges (*Grain Transportation Report* (GTR), April 13, 2023). In addition, navigation conditions on the Mississippi River had improved since all-time low water levels were recorded in fourth quarter 2022 (*GTR*, January 26, 2023). All these factors—soft barge demand and improved river-navigation conditions—led to a significant drop in barge rates. Truck rates fell partly because of a quarter-to-quarter drop in diesel fuel prices (***GTR* fig. 13**). Rail rates fell because of a decline in fuel surcharges (***GTR* fig. 6**). Ocean freight rates fell because of seasonally low shipping demand caused by various holidays around the world (*GTR*, May 4, 2023).

Year-to-year transportation costs. From first quarter 2022 to first quarter 2023 (year to year), total costs of shipping all grain—U.S. corn, soybeans, and wheat—to Mexico by the water routes fell because of lower truck, barge, and ocean freight rates. Total costs of shipping all grain to Mexico by the land routes rose mainly because of higher rail rates.

Quarter-to-quarter landed costs. Quarter to quarter, landed costs fell for all grain shipped via the water routes and fell for wheat shipped by the land routes. Landed costs rose for corn and soybeans shipped over land. For seaborne corn and soybeans, the lower landed costs reflected a decrease in transportation costs that exceeded the increase in farm values (table 1 and figs. 1 and 2). For wheat shipped by the land and water routes, drops in both the transportation costs and farm values pushed down the landed costs. However, for corn and soybeans shipped by the land routes, higher landed costs reflected an increase in farm values that exceeded the decrease in transportation costs. The share of landed costs comprising transportation ranged from 10 percent to 20 percent for the water routes and from 18 percent to 31 percent for the land routes.

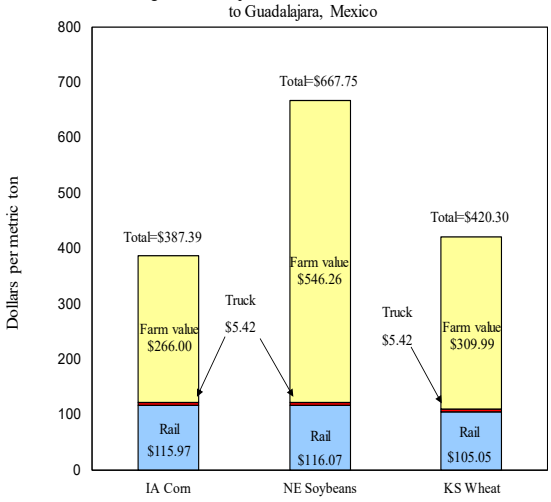
Year-to-year landed costs. Year to year, landed costs increased for all waterborne corn and soybeans, and all land-route grain. These rises reflected an increase in one or both landed-cost components—i.e., transportation costs and farm values.

Figure 1. First-quarter 2023 water-route landed costs to Veracruz, Mexico



Note: IL = Illinois; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Figure 2. First-quarter 2023 land-route landed costs to Guadalajara, Mexico



Note: IA = Iowa; NE = Nebraska; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

U.S. Exports to Mexico. According to USDA's Federal Grain Inspection Service, Mexico imported 3.81 million metric tons (mmt) of U.S. corn, 1.37 mmt of U.S. soybeans, and 0.80 mmt of U.S. wheat in first quarter 2023. Quarter to quarter, U.S. inspections for export to Mexico increased 3 percent for corn, fell 15 percent for soybeans, and increased 2 percent for wheat. Year to year, U.S. inspections destined to Mexico were down 5 percent for corn, down 18 percent for wheat, and up 7 percent for soybeans. According to a report from USDA's Foreign Agricultural Service, Mexico's "corn imports are estimated to decrease" in marketing year 2022/23 because of recently imposed export tariffs on white corn and the country's restrictions on using genetically engineered corn in the tortilla industry. *surajudeen.olowolayemo@usda.gov*

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
05/24/23	261	322	242	152	228	200
05/17/23	262	323	238	160	229	202

[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	5/19/2023	5/12/2023
Corn	IL–Gulf	-0.68	-0.75
Corn	NE–Gulf	-0.38	-0.56
Soybean	IA–Gulf	-0.97	-0.97
HRW	KS–Gulf	-1.89	-1.60
HRS	ND–Portland	-1.83	-1.86

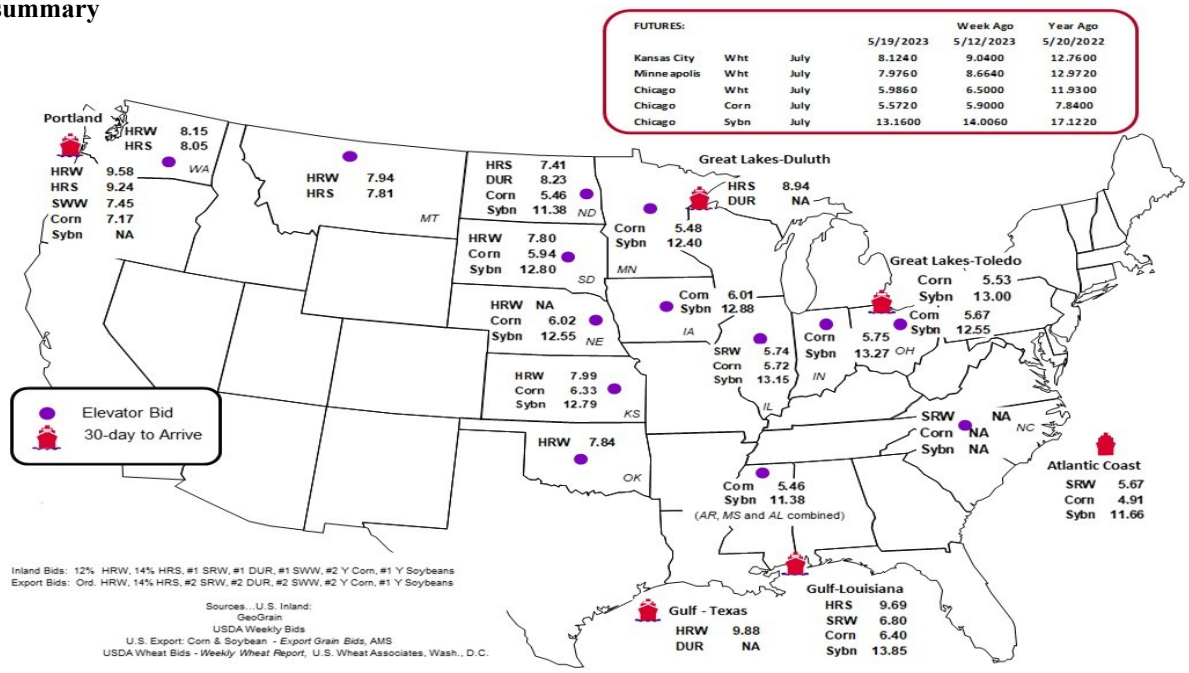
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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)

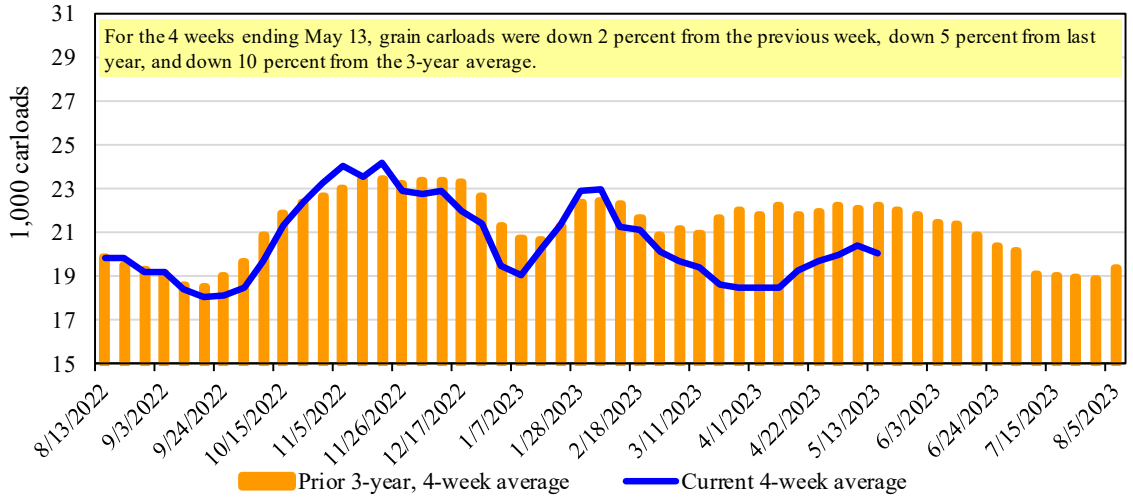
For the week ending:	East		West		U.S. total	Central U.S./Canada	
5/13/2023	CSXT	NS	BNSF	UP		CPKC	CN
This week	1,475	2,912	9,165	5,266	18,818	5,101	3,415
This week last year	2,057	2,665	10,683	5,453	20,858	4,393	3,684
2023 YTD	37,959	50,841	186,089	109,851	384,740	110,574	94,369
2022 YTD	35,308	44,753	220,215	112,821	413,097	88,914	66,684
2023 YTD as % of 2022 YTD	108	114	85	97	93	124	142
Last 4 weeks as % of 2022	97	113	83	111	99	129	119
Last 4 weeks as % of 3-yr. avg.	101	112	79	99	94	129	98
Total 2022	93,313	130,452	570,232	296,945	1,090,942	269,138	214,199

Note: The last 4-week percentages compare the last 4 weeks of this year to the closest 4 weeks last year, and to the average across the prior 3 years. The U.S. total column excludes CPKC. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year.

Source: Association of American Railroads.

Figure 2

Total weekly U.S. Class I railroad grain carloads



Note: U.S. total excludes Canadian Pacific Kansas City

Source: Association of American Railroads.

Table 4

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

For the week ending:		Delivery period							
5/18/2023		Jun-23	Jun-22	Jul-23	Jul-22	Aug-23	Aug-22	Sep-23	Sep-22
BNSF[3]	COT grain units	no offer	no offer	no bids	0	0	0	no offer	no offer
	COT grain single-car	0	no offer	0	97	0	39	no bids	no offer
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.

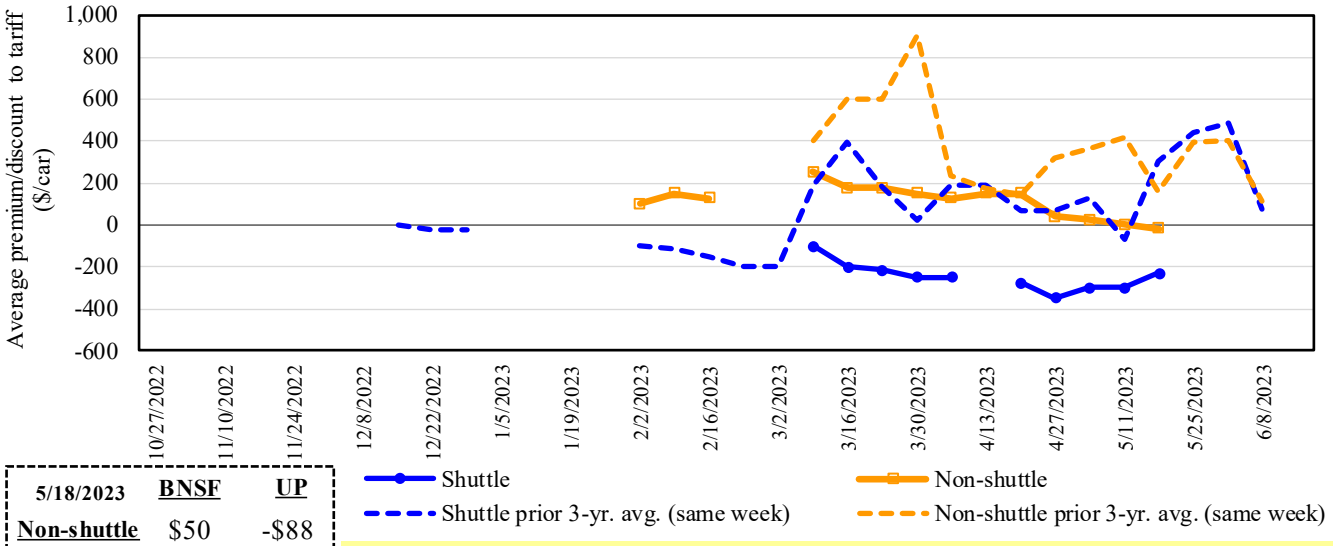
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 June 2023

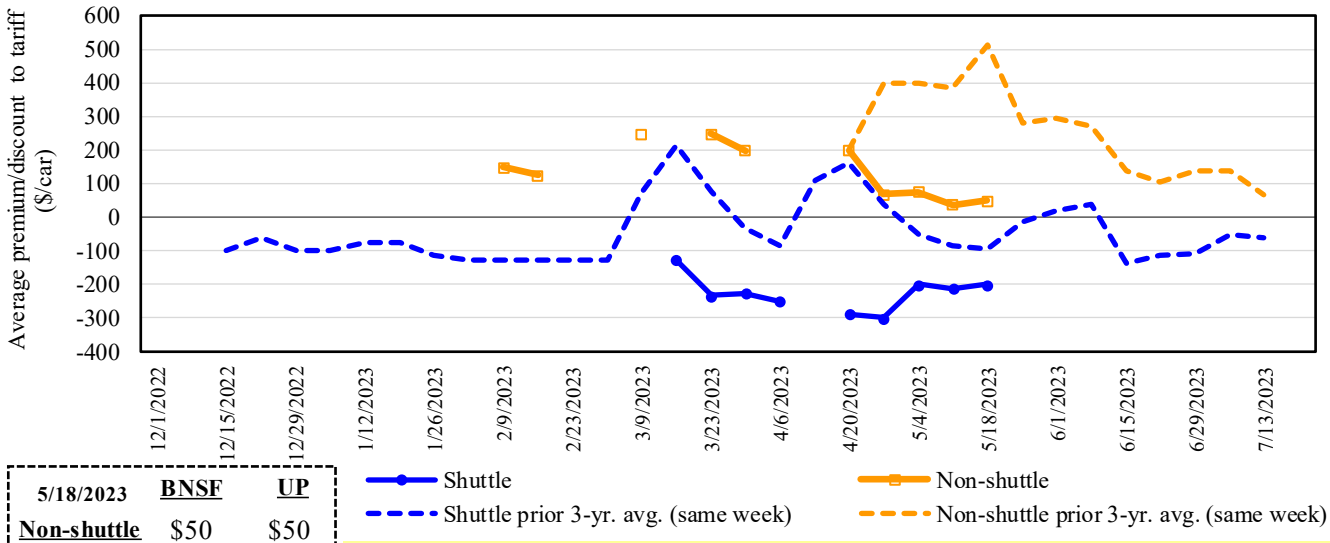


5/18/2023	BNSF	UP
Non-shuttle	$50	-$88
Shuttle	-$263	-$200

Average non-shuttle bids/offers fell $19 this week, and are $269 below the peak.
Average shuttle bids/offers rose $69 this week and are $131 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 July 2023



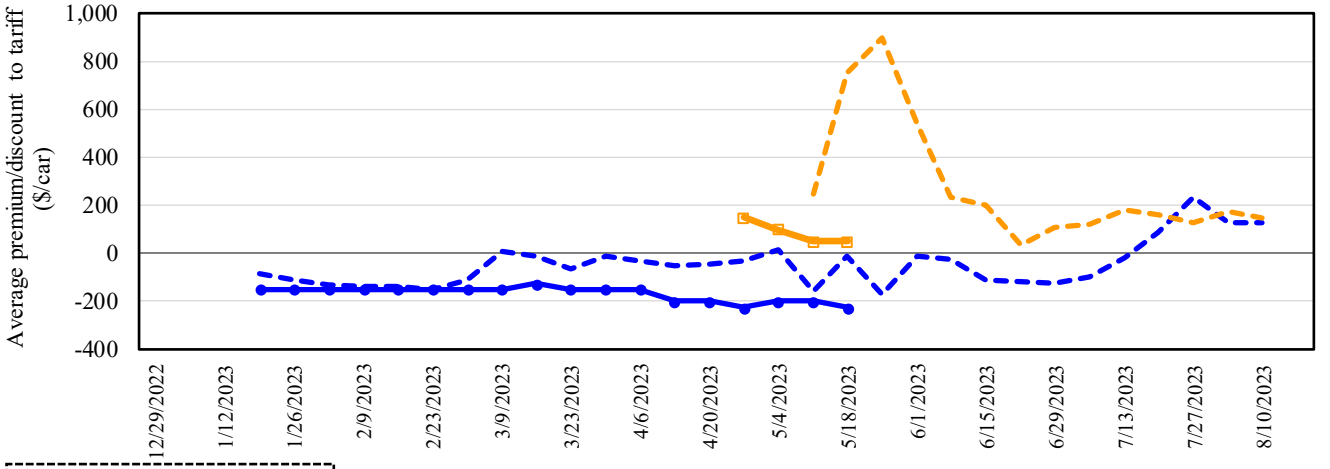
5/18/2023	BNSF	UP
Non-shuttle	$50	$50
Shuttle	-$200	-$200

Average non-shuttle bids/offers rose $13 this week, and are $200 below the peak.
Average shuttle bids/offers rose $13 this week and are $75 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 August 2023



5/18/2023	BNSF	UP
Non-shuttle	n/a	$50
Shuttle	-$250	-$200

Average non-shuttle bids/offers are unchanged this week, and are $100 below the peak.
Average shuttle bids/offers fell $25 this week and are $100 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: 5/18/2023	Delivery period					
		Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23
Non-shuttle	**BNSF-GF**	**50**	**50**	**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	(163)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(88)**	**50**	**50**	**n/a**	**n/a**	**n/a**
	Change from last week	(38)	25	0	n/a	n/a	n/a
	Change from same week 2022	n/a	(850)	(700)	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(263)**	**(200)**	**(250)**	**(188)**	**n/a**	**n/a**
	Change from last week	n/a	25	n/a	26	n/a	n/a
	Change from same week 2022	(575)	(233)	(167)	(175)	n/a	n/a
	UP-Pool	**(200)**	**(200)**	**(200)**	**0**	**n/a**	**n/a**
	Change from last week	100	0	0	50	n/a	n/a
	Change from same week 2022	(2,400)	n/a	(700)	(650)	n/a	n/a
	CP-GF	**(100)**	**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 2022	(150)	n/a	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

Date: December 2021							
Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	Tariff rate plus fuel surcharge per: metric ton[3]	bushel[3]	Percent change[4] Y/Y
Wheat	MT	Chihuahua, CI	$7,699	$0	$78.67	$2.14	4
	OK	Cuautitlan, EM	$6,900	$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.

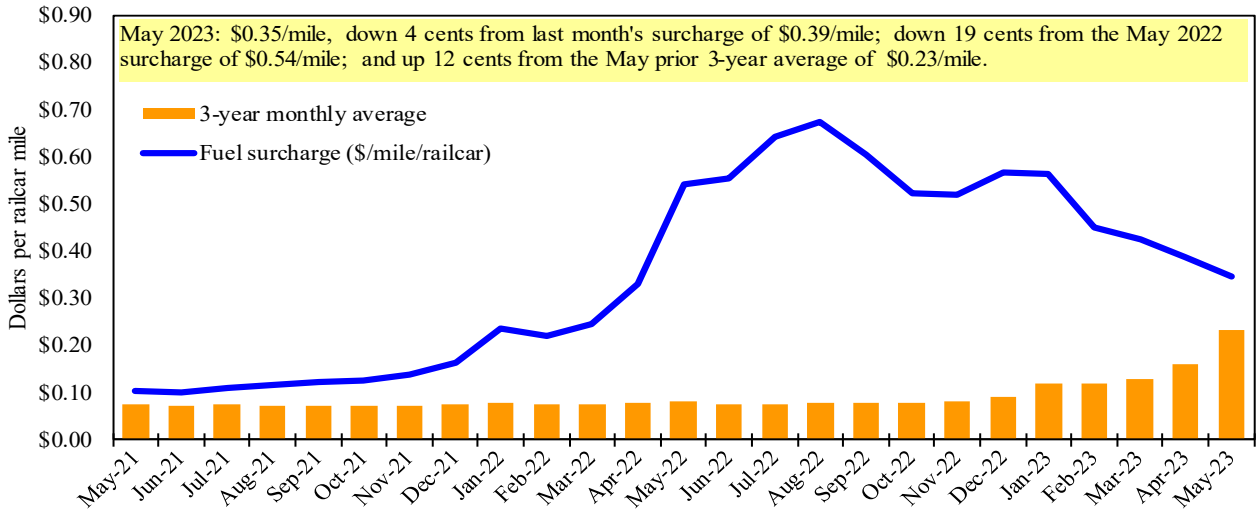
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[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]

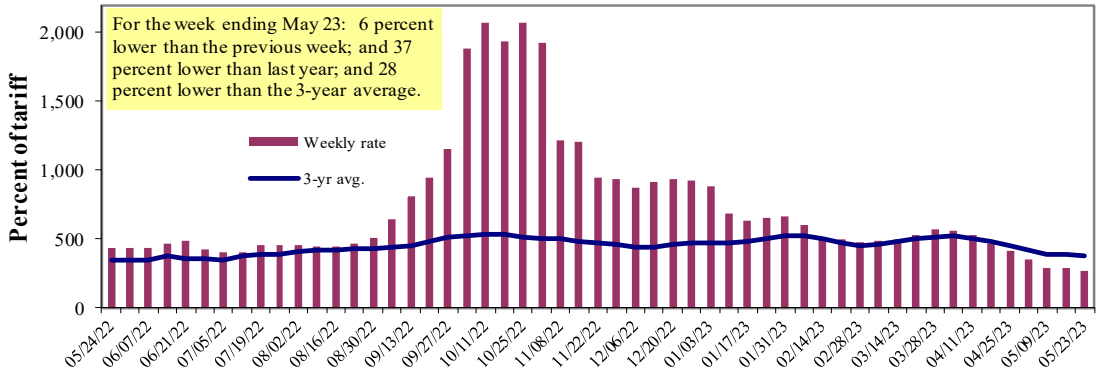


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

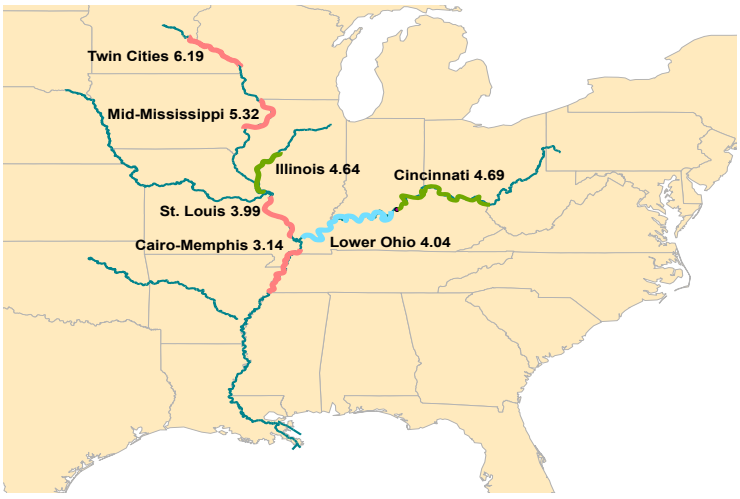
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	5/23/2023	407	319	273	211	227	227	211
	5/16/2023	445	343	288	226	261	261	225
$/ton	5/23/2023	25.19	16.97	12.67	8.42	10.65	9.17	6.63
	5/16/2023	27.55	18.25	13.36	9.02	12.24	10.54	7.07
Current week % change from the same week:								
	Last year	-25	-34	-37	-31	-46	-46	-30
	3-year avg. [2]	-13	-21	-28	-22	-26	-26	-16
Rate[1]	June	411	318	279	210	233	233	215
	August	502	462	445	383	434	434	344

[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

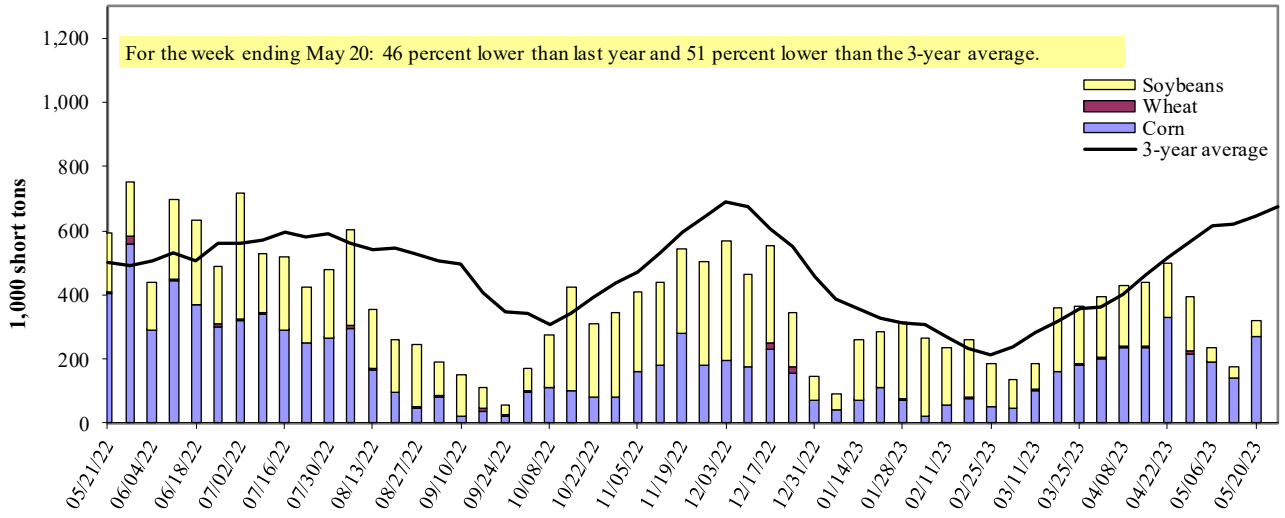
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 05/20/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	115	0	47	0	163
Winfield, MO (L25)	210	0	39	0	249
Alton, IL (L26)	282	0	49	0	331
Granite City, IL (L27)	272	0	46	0	317
Illinois River (La Grange)	89	0	13	0	102
Ohio River (Olmsted)	144	0	30	0	174
Arkansas River (L1)	1	13	0	0	14
Weekly total - 2023	417	13	76	0	506
Weekly total - 2022	492	21	198	0	711
2023 YTD[1]	5,540	518	4,960	152	11,169
2022 YTD[1]	7,947	633	4,803	125	13,506
2023 as % of 2022 YTD	70	82	103	122	83
Last 4 weeks as % of 2022[2]	62	98	43	63	57
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.

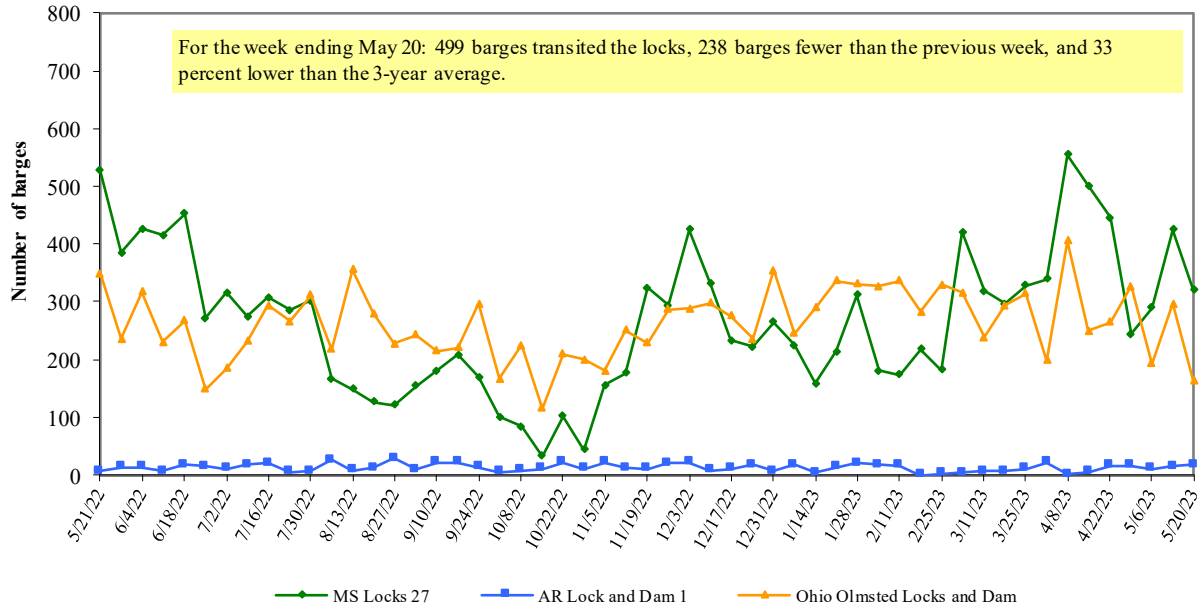
[2] As a percent of same period in 2022.

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

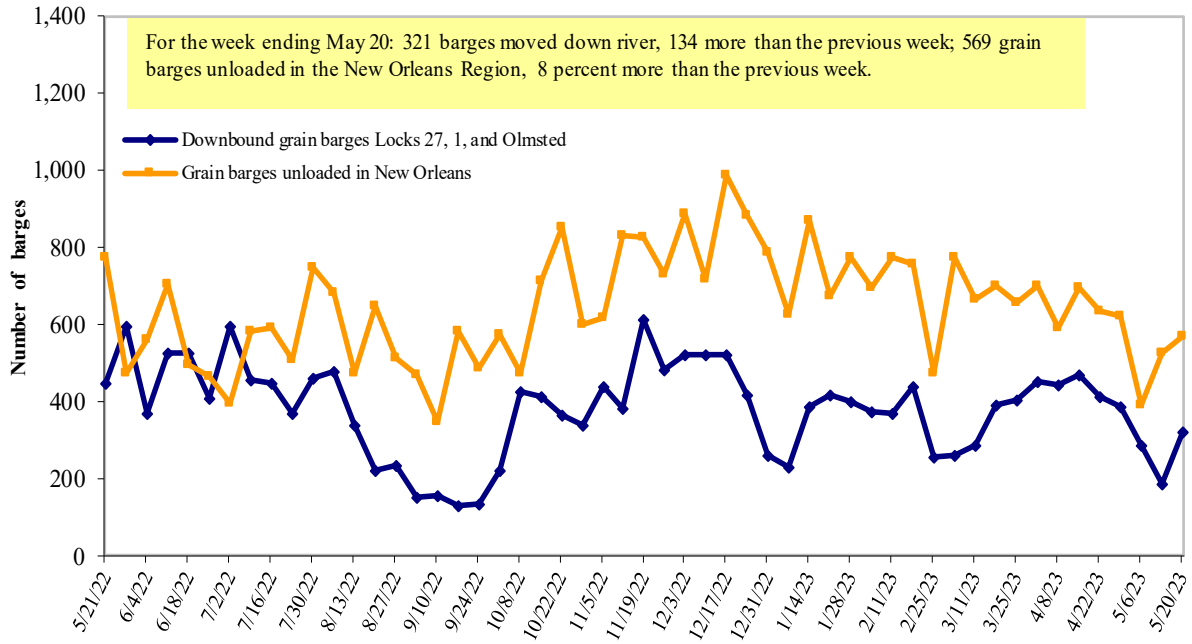


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

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 5/22/2023 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.912	-0.020	-1.993
	New England	4.166	-0.077	-2.205
	Central Atlantic	4.198	-0.040	-2.127
	Lower Atlantic	3.780	-0.007	-1.788
II	Midwest	3.810	-0.013	-1.483
III	Gulf Coast	3.579	-0.014	-1.637
IV	Rocky Mountain	4.088	-0.001	-1.410
V	West Coast	4.586	-0.002	-1.495
	West Coast less California	4.378	-0.004	-1.225
	California	4.825	0.000	-1.677
Total	United States	3.883	-0.014	-1.688

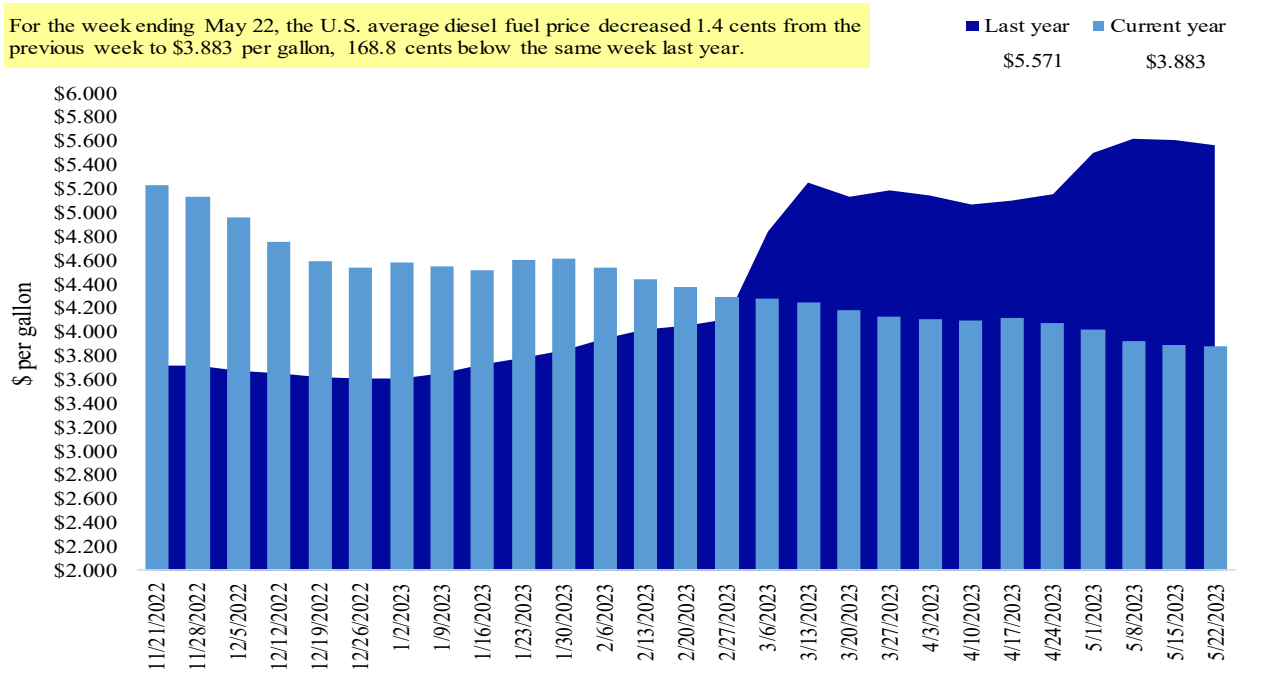
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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



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)

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances[1]									
5/11/2023	387	316	680	508	92	1,983	10,451	3,113	15,547
This week year ago	592	200	554	233	1	1,579	16,005	10,488	28,071
Cumulative exports-marketing year[2]									
2022/23 YTD	4,723	2,585	5,074	4,163	360	16,904	27,603	47,670	92,177
2021/22 YTD	6,883	2,678	4,969	3,133	196	17,859	42,900	48,721	109,479
YTD 2022/23 as % of 2021/22	69	97	102	133	184	95	64	98	84
Last 4 wks. as % of same period 2021/22	85	186	134	240	21,495	145	78	33	65
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 5/11/2023	Total commitments[2]			% change	Exports[3]
	2023/24 next MY	2022/23 current MY	2021/22 last MY	current MY from last MY	3-yr. avg. 2019-21
		1,000 mt -			-1,000 mt -
Mexico	1,890	13,935	15,735	(11)	15,227
China	272	7,765	14,696	(47)	12,616
Japan	473	5,655	8,973	(37)	10,273
Columbia	0	1,991	4,159	(52)	4,398
Korea	0	782	1,323	(41)	2,563
Top 5 importers	**2,635**	**30,129**	**44,886**	(33)	**45,077**
Total U.S. corn export sales	**2,700**	**38,055**	**58,904**	(35)	**56,665**
% of YTD current month's export projection	5%	84%	94%		
Change from prior week[2]	**74**	**(339)**	**414**		
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 5/11/2023	Total commitments[2]			% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
	2023/24 next MY	2022/23 current MY	2021/22 last MY		
		1,000 mt -			-1,000 mt -
China	1,051	31,054	30,443	2	27,283
Mexico	84	4,374	5,131	(15)	4,929
Egypt	0	1,109	3,783	(71)	3,553
Japan	98	2,073	2,120	(2)	2,266
Indonesia	0	1,378	1,527	(10)	2,116
Top 5 importers	**1,233**	**39,988**	**43,004**	(7)	**40,147**
Total U.S. soybean export sales	**2,551**	**50,783**	**50,208**	1	**54,231**
% of projected exports	5%	92%	85%		
change from prior week[2]	**664**	**17**	**(8,247)**		
Top 5 importers' share of U.S. soybean export sales	48%	79%	86%		**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 5/11/2023	Total commitments[2]			% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
	2023/24 next MY	2022/23 current MY	2021/22 last MY		
		1,000 mt -			-1,000 mt -
Mexico	413	3,271	3,804	(14)	3,566
Philippines	301	2,237	2,782	(20)	2,985
Japan	113	2,248	2,350	(4)	2,453
China	0	1,099	848	30	1,537
Nigeria	50	792	1,765	(55)	1,528
Korea	121	1,335	1,231	8	1,459
Taiwan	65	854	954	(10)	1,106
Indonesia	0	345	122	183	711
Thailand	48	637	559	14	703
Colombia	24	535	691	(23)	621
Top 10 importers	**1,133**	**13,352**	**15,104**	(12)	**16,669**
Total U.S. wheat export sales	**1,962**	**18,887**	**19,438**	(3)	**22,763**
% of projected exports	10%	89%	89%		
change from prior week[2]	**337**	**(42)**	**9**		
Top 10 importers' share of U.S. wheat export sales	58%	71%	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)

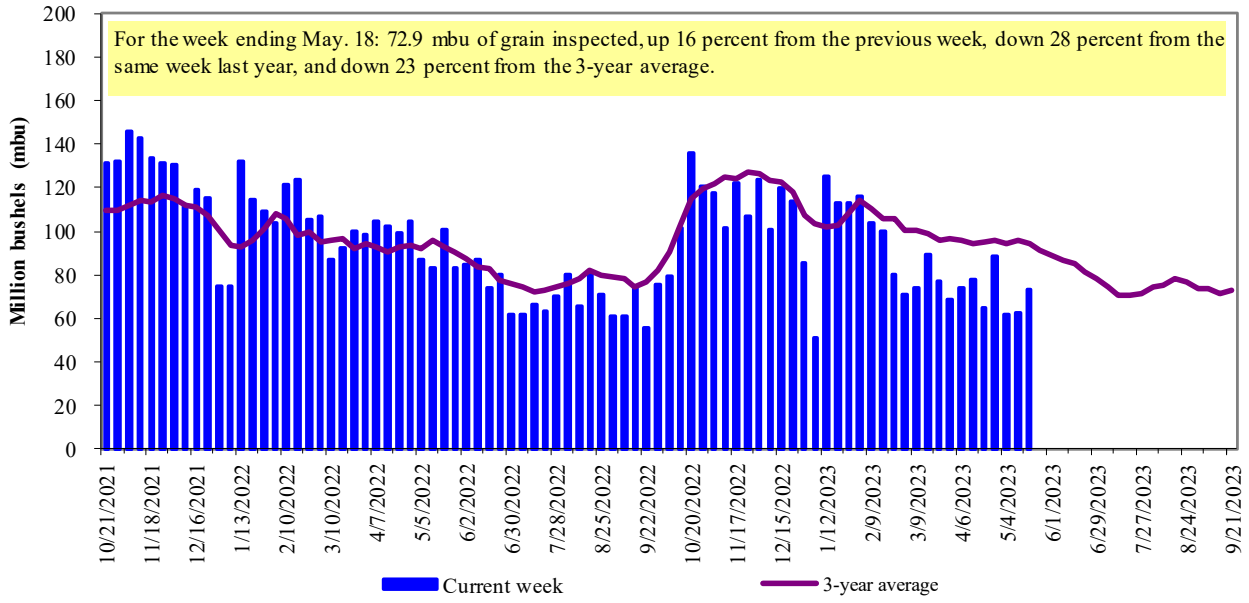
Port regions	For the week ending 05/18/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of:		2022 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	272	113	242	4,175	3,700	113	106	53	9,836
Corn	314	396	79	2,810	5,904	48	77	78	9,615
Soybeans	0	11	0	3,521	4,337	81	28	39	14,178
Total	**586**	**520**	**113**	**10,506**	**13,941**	**75**	**78**	**67**	**33,629**
Mississippi Gulf									
Wheat	53	29	184	1,119	1,590	70	68	84	4,053
Corn	837	581	144	10,728	17,222	62	85	80	30,781
Soybeans	89	71	126	12,336	10,286	120	50	80	31,283
Total	**979**	**680**	**144**	**24,183**	**29,098**	**83**	**74**	**80**	**66,116**
Texas Gulf									
Wheat	54	61	88	1,061	1,271	83	102	86	3,421
Corn	0	0	n/a	88	305	29	25	24	648
Soybeans	0	0	n/a	52	2	n/a	n/a	0	685
Total	**54**	**61**	**88**	**1,201**	**1,578**	**76**	**85**	**73**	**4,754**
Interior									
Wheat	49	42	115	1,017	1,110	92	109	102	2,912
Corn	149	151	99	3,631	3,594	101	101	90	8,961
Soybeans	65	103	63	2,646	2,921	91	61	63	7,109
Total	**262**	**296**	**89**	**7,295**	**7,624**	**96**	**87**	**83**	**18,982**
Great Lakes									
Wheat	0	32	0	111	85	131	221	40	395
Corn	0	23	0	23	63	36	50	131	158
Soybeans	0	0	n/a	31	170	18	0	0	760
Total	**0**	**55**	**0**	**165**	**318**	**52**	**40**	**42**	**1,312**
Atlantic									
Wheat	2	0	n/a	45	37	122	n/a	n/a	169
Corn	0	3	0	58	89	65	50	106	309
Soybeans	9	12	81	1,153	1,218	95	25	51	2,867
Total	**11**	**15**	**78**	**1,256**	**1,345**	**93**	**31**	**63**	**3,345**
U.S. total from ports*									
Wheat	429	277	155	7,528	7,793	97	98	68	20,786
Corn	1,300	1,153	113	17,339	27,176	64	83	80	50,471
Soybeans	163	196	83	19,739	18,935	104	47	68	56,882
Total	**1,892**	**1,627**	**116**	**44,606**	**53,904**	**83**	**76**	**75**	**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)

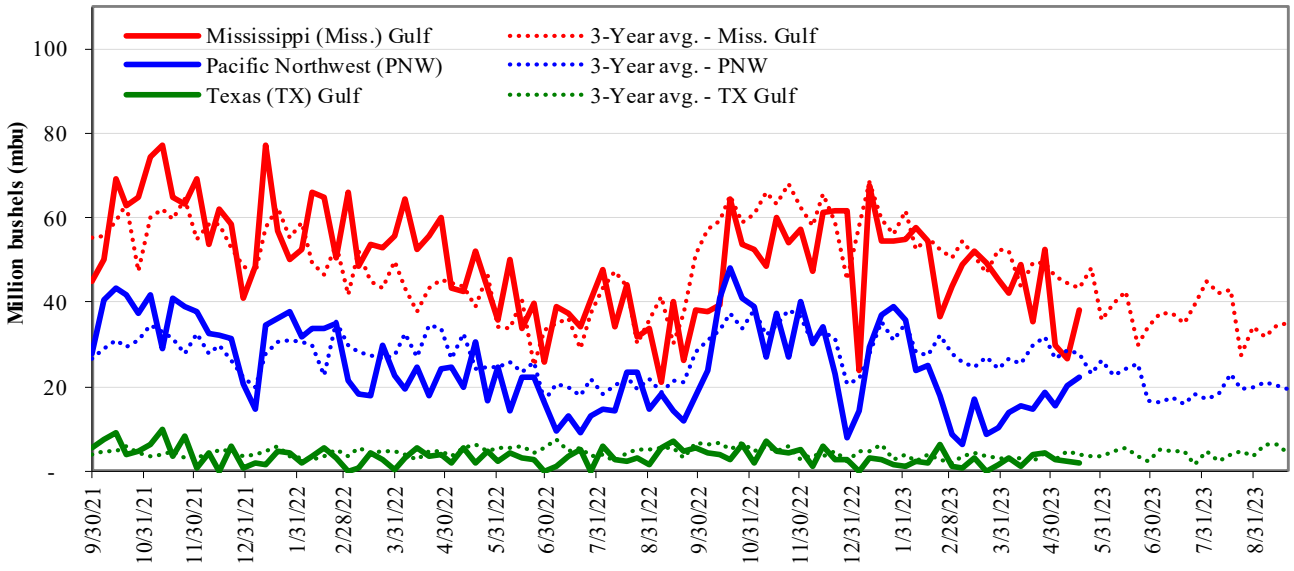


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 05/18/23 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	38.2	Last wk:	up 44	down 12	up 40	up 11
PNW:	22.3	Last Year (same wk):	down 27	up 5	down 26	down 27
TX Gulf:	2.0	3-yr avg. (4-wk. mov. Avg):	down 17	down 49	down 19	down 22

Source: USDA, Federal Grain Inspection Service.

Table 16

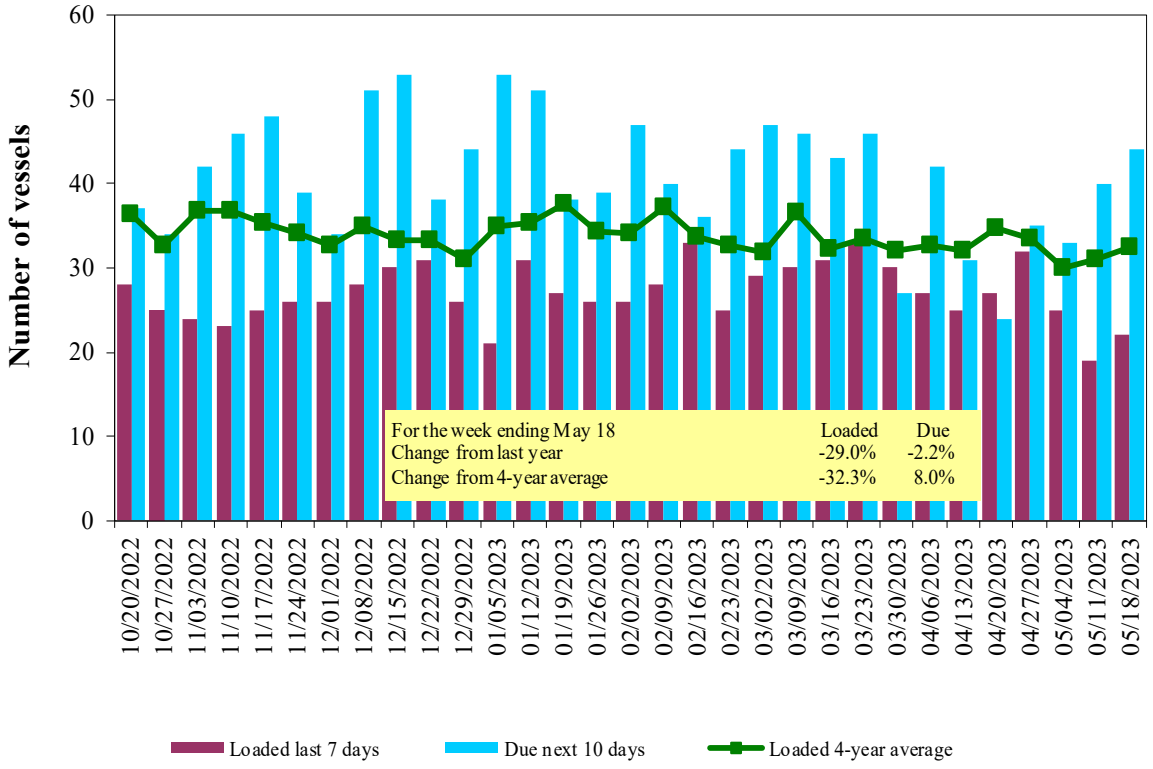
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
5/18/2023	11	22	44	14
5/11/2023	14	19	40	13
2022 range	(14…61)	(18…39)	(28...62)	(5…23)
2022 average	30	28	44	13

Source: USDA, Agricultural Marketing Service.

Figure 15

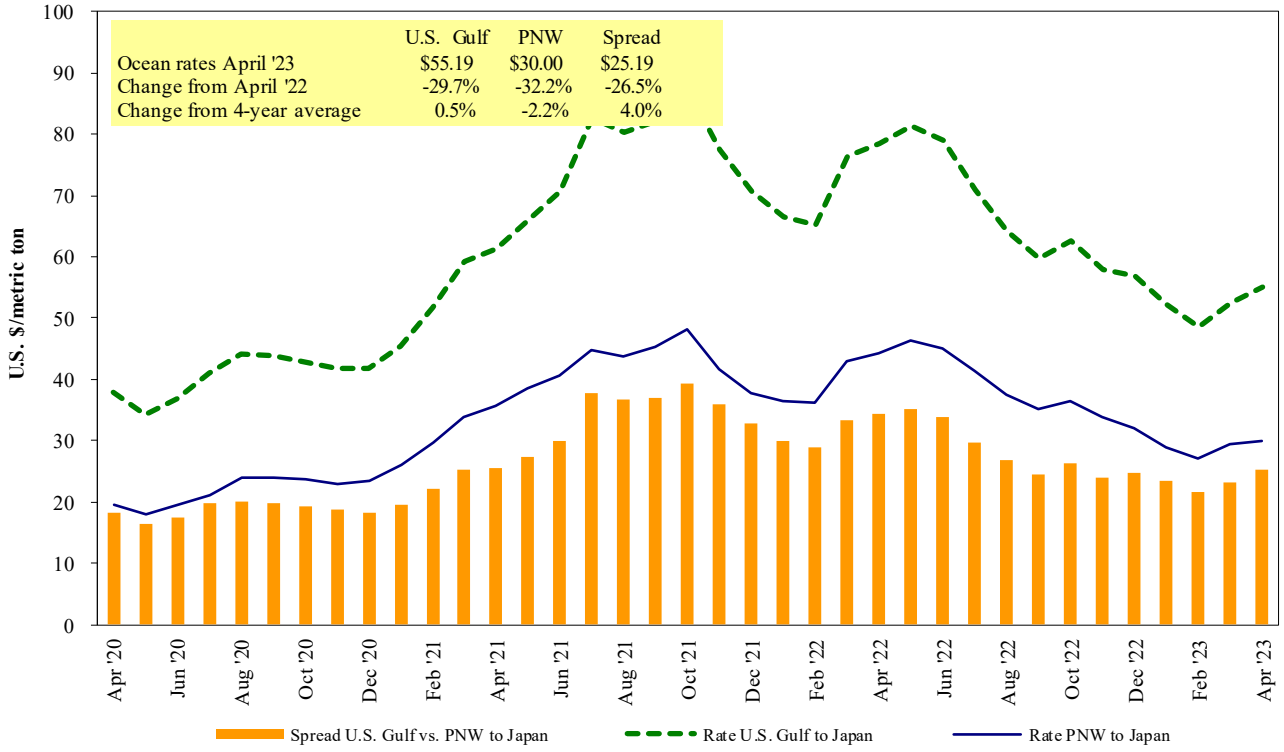
U.S. Gulf[1] vessel loading activity



[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 05/20/2023

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

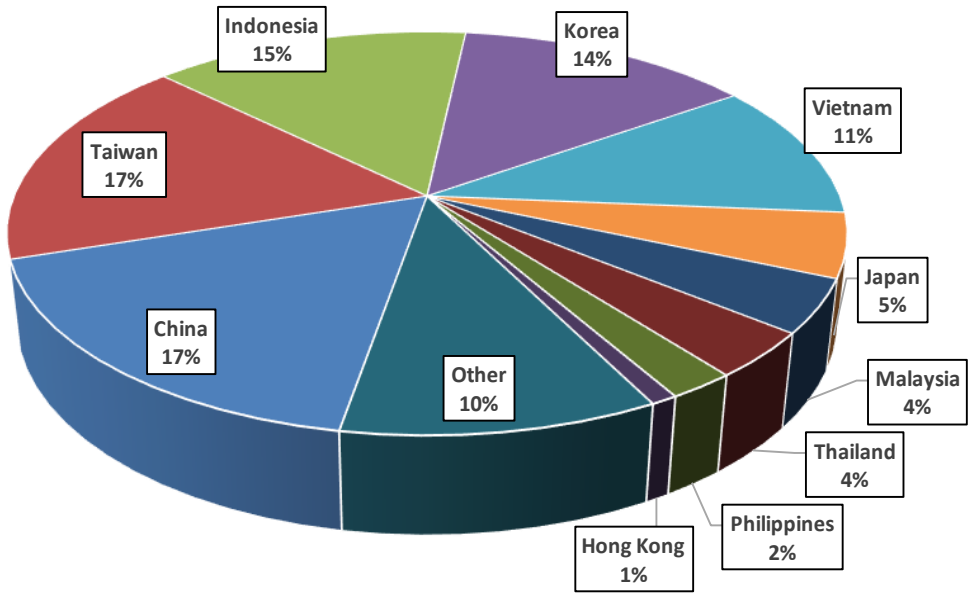
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

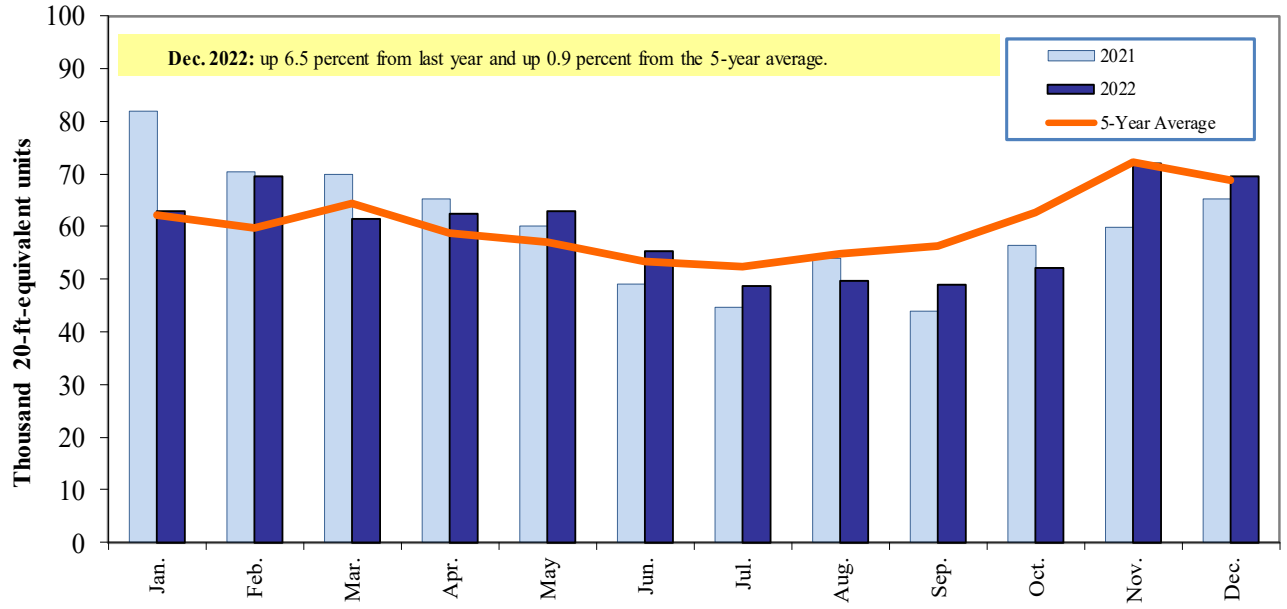
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2022



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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