United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contact Us

June 1, 2023

Contents

The next release is June 8, 2023

WEEKLY HIGHLIGHTS

EPA Extends Waiver To Allow Sale of E15 Gasoline in Summer

Through June 10, the U.S. Environmental Protection agency (EPA) has extended an earlier waiver to allow E15 gasoline (a 15-percent ethanol blend) to continue to be sold this summer. EPA intended the waiver to reduce soaring gasoline prices resulting from the supply uncertainty spawned by Russia's invasion of Ukraine. EPA also issued the waiver to encourage U.S. energy independence and support American agriculture. EPA's decision to extend the waiver follows an open letter to EPA from the Governors of Iowa, Minnesota, Nebraska, and South Dakota requesting that summer sales of E15 gasoline be allowed in the marketplace. According to EPA, the E15 blend is about 25 cents per gallon cheaper than E10 and is not expected to significantly affect air quality.

War in Sudan Raises Shipping Costs and Threatens Grain Sorghum Food Aid

The East African country of Sudan is currently experiencing conflict between rival factions of its government. Because of the fighting, London's marine insurance market added Sudan to its list of high-risk countries on April 25. In effect, the "high-risk" designation will mean that any ships sailing into Sudan will need to pay an additional war-risk premium and receive permission from their insurer. Sudan is a leading destination for U.S.-produced grain sorghum, all of which is shipped in the form of food aid. According to data from USDA's Foreign Agricultural Service, Sudan was the third-largest recipient of U.S. grain sorghum in 2022—importing nearly 123,000 metric tons. Shipments of food aid tend to be more expensive than grain exports in general because of cargo preference requirements, which specify that at least 50 percent of food aid must be shipped on U.S.-flagged vessels (that can be a more expensive option than foreign-flagged vessels). The additional insurance premiums and uncertainty surrounding shipping will raise the costs even more for shipping grain-sorghum food aid to Sudan.

U.S. Grains Council Releases Report on Corn Export Cargo Quality

The U.S. Grains Council (USGC) recently released results from its 12th annual corn quality survey in the *2022/2023 Corn Export Cargo Quality Report*. This report accompanies USGC's *2022/2023 Corn Harvest Quality Report*, and the differences in results between the two reports reflect changes in corn quality during the marketing process—of which transportation is a key component. The report is based on 430 export cargo samples collected from shipments inspected by USDA's Federal Grain Inspection Service. Corn samples were evaluated for grade factors (e.g., test weight, heat damage, etc.), intrinsic quality characteristics (e.g., protein, starch, and oil content), physical quality characteristics (e.g., stress cracks), and sanitary quality characteristics (e.g., mycotoxins). The results are presented at the U.S. aggregate level, as well as for the three major export catchment areas: Gulf, Pacific Northwest, and Southern Rail (i.e., rail exports to Mexico from inland sources). Because of lack of aeration during transport, grain shipments are vulnerable to moisture variation leading to possible fungal invasions or pest infestations. The full report can be downloaded here.

Snapshots by Sector

Export Sales

For the week ending May 18, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 13.37 million metric tons (mmt), down 14 percent from last week and down 48 percent from the same time last year. Net **corn export sales** for MY 2022/23 were -0.075, down 78 percent from last week. Net **soybean export sales** were 0.115 mmt, up significantly from last week. Net weekly **wheat export sales** were −0.045 mmt, down 7 percent from last week.

Rail

U.S. Class I railroads originated 17,807 **grain carloads** during the week ending May 20. This was a 5-percent decrease from the previous week, 13 percent less than last year, and 18 percent lower than the 3-year average.

Average June **shuttle secondary railcar bids/offers** (per car) were $238 below tariff for the week ending May 25. This was $6 less than last week and $1,938 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $50 below tariff. This was $31 less than last week, and $763 lower than this week last year.

Barge

For the week ending May 27, **barged grain movements** totaled 804,442 tons. This was 59 percent more than the previous week and 15 percent less than the same period last year.

For the week ending May 27, 516 grain barges **moved down river**—195 more than last week. There were 601 grain barges **unloaded** in the New Orleans region, 6 percent more than last week.

Ocean

For the week ending May 25, 24 **oceangoing grain vessels** were loaded in the Gulf—8 percent fewer than the same period last year. Within the next 10 days (starting May 26), 35 vessels were expected to be loaded—3 percent fewer than the same period last year.

As of May 25, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $50.00. This was 2 percent less than the previous week. The rate from the Pacific Northwest to Japan was $27.50 per mt, 3 percent less than the previous week.

Fuel

For the week ending May 29, the U.S. average **diesel fuel price** decreased 2.8 cents from the previous week to $3.855 per gallon, 168.4 cents below the same week last year.

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Feature Article/Calendar

Grain Shuttle Trains: Relationship Between Auction Markets and Turns

Shuttle trains carry the majority of total grain rail shipments and are critical to the bulk supply chain. These trains link grain elevators to export terminals, processing mills, poultry and livestock integrators, soybean crushing facilities, and ethanol plants. Made up of a large group of grain cars, typically 75 or more, shuttle trains move as a single unit from an origin to a destination.[1] As a bulk rail service option, shuttle-train service increases railroad efficiencies for shippers that have invested in specialized shuttle-loading facilities—typically, large shippers. In contrast, non-shuttle bulk rail service mainly caters to small elevators. Because non-shuttle service involves sorting and building multi-commodity trains, it is slower and more labor-intensive than shuttle service.

This article begins with a discussion of shuttle train turns—a key shuttle service metric that also offers insights into rail service for grain destination markets. Next is an analysis of the secondary market for shuttle train contracts. The piece concludes by discussing how shuttle train turns influence secondary market values.

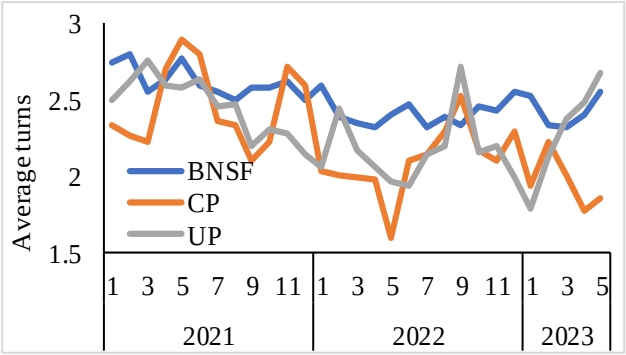
Shuttle Train Turns

Background. In the context of shuttle trains, "shuttle turn" refers to the number of trips completed per month by a single train. A key metric in itself, shuttle turns are also a key variable in calculating total monthly (shuttle) carloads across the system—another critical metric that equals the number of shuttle trains multiplied by the number of cars in a train multiplied by the number of turns. Because the number of shuttle turns depends on rail service, total carloads will vary from month to month.

Shuttle turns reflect rail service issues specific to shuttle trains. Some of these issues (e.g., labor shortages) resemble those of non-shuttle service, but other non-shuttle service issues (e.g., yard congestion) affect shuttle trains less. Additionally, because shuttle turns represent a full origin-destination trip, they reflect service issues at any point along the rail shipment timeline (e.g., origin dwell issues or track congestion).

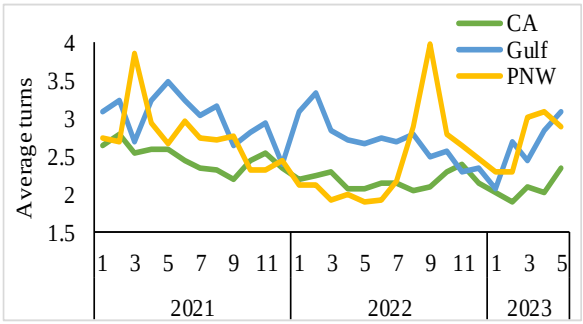
Recent turn data. From the three western Class I railroads with dedicated grain shuttle service—i.e., BNSF, UP, and CP—the Surface Transportation Board (STB) collects monthly data on the number of turns their grain shuttles make per month (available on AgTransport). The number of turns is reported at the system level and by specific regions (figs. 1 and 2). Figure 1 shows average grain shuttle turns in 2022 were below 2021. In 2023, turns have increased somewhat for BNSF and UP, but turns along the CP network have remained low.

Figure 1. Shuttle turns by railroad, January 2021 – May 2023



Source: USDA, Agricultural Marketing Service analysis of Surface Transportation Board data.

Figure 2. Shuttle turns by region, January 2021 – May 2023



Source: USDA, Agricultural Marketing Service analysis of Surface Transportation Board data.

Because estimating turns per month represents a source of risk for shippers, turns' predictability is important. Of the three railroads, BNSF operates the largest shuttle fleet, and average shuttle turns for the BNSF fleet (in 2021-23) were relatively consistent from month to month (see fig. 1). In contrast, average monthly shuttle turns for UP and CP were more variable—ranging from a low of 1.8 to a high of 2.8 over the UP network, and from a low of 1.6 to a high of 2.9 over the CP network. UP guarantees 2.5 turns per month on most shuttle trains (with some regional exceptions). In 2022, UP averaged below 2.5 turns per month every month, except September.

At the regional level, in the first half of 2022, average turns into the Pacific Northwest (PNW), U.S. Gulf Coast (Gulf), and California all trended downward (fig. 2).[2] In the second half of 2022, turns into PNW rose somewhat, whereas turns into the Gulf did not show improvements until 2023. For both PNW and the Gulf, May 2023 turns have been higher than January 2021. Throughout 2021 and most of 2022, turns into California showed similar declines to the other regions. More recently, showing signs of recovery, California

[1] Although all Class I railroads have some form of a shuttle car program, this article focuses on the three western Class I railroads—BNSF Railway (BNSF), Union Pacific Railway (UP), and the Canadian Pacific Railway (CP)—because they move the bulk of the Nation's grain and use an auction system. On April 14, CP merged with the Kansas City Southern Railway to form Canadian Pacific Kansas City (CPKC). However, the two shuttle train fleets have not been integrated as of this writing, so this article refers only to CP.

[2] For context, in a typical year, 65 percent of shuttles are destined to PNW and only 35 percent are destined to other regions.

turns started increasing at the end of 2022, but were impacted by extreme winter weather this year. Since March, California turns have resumed recovering, but in contrast to the other regions, California shuttles have not recovered to January 2021 levels.

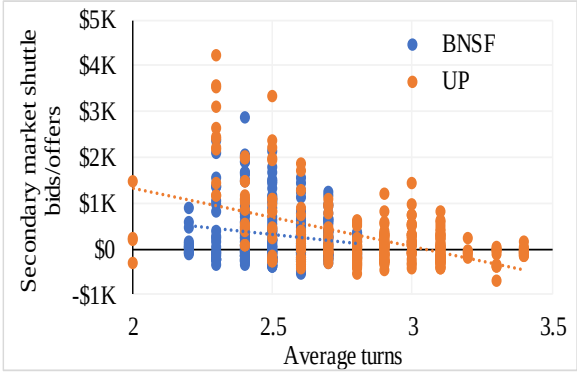
Shuttle Auction Markets

Background. Grain shuttle trains are leased to shippers through auction markets. The development of these forward markets for guaranteed railcar service was one of the innovations that followed the rail industry's deregulation in the 1980s (*Grain Transportation Report (GTR),* February 19, 2015). Prior to deregulation, rail service was provided on a *first-come- first-served* basis at predetermined tariff rates. Under this arrangement, shippers lacked confidence that they would receive railcars when needed—especially during unexpected disruptions or changes in the market that lowered shuttle turns. Forward-guaranteed contracts reduced uncertainty for shippers by better ensuring railcar placement and rail tariffs during a specific timeframe, and they also created a mechanism for railcars to be reallocated among shippers based on willingness to pay.

Shuttle trains are initially allocated in a primary market, where shippers bid on (typically, 12-month) contracts offered by the railroad. Bids in the primary market are often zero because of uncertainty in the total number of carloads. Owners of these primary shuttle contracts are allowed to "sell trains" (usually, a single trip or packages of multiple trips) through a secondary freight market administered by third-party brokers, and values are measured on a per-car basis, at either a premium or discount to tariff.[3]

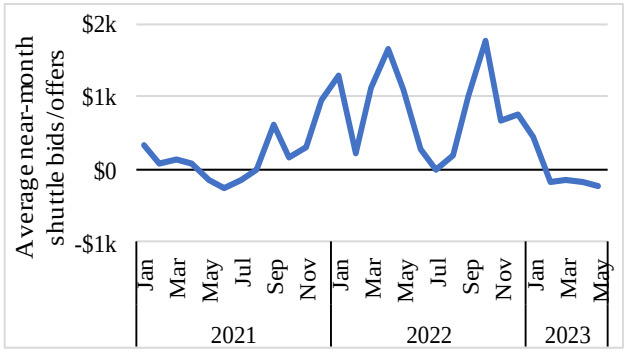
Secondary rates' connection to turns. When turns are higher than expected, shippers who had previously purchased shuttle contracts tend to have excess carloads. Conversely, when turns are lower than expected, those same shippers (with previously purchased contracts) tend to be short on carloads. This variation in total carloads creates opportunities for buying and selling on the secondary freight market.[4] Figure 3 shows the relationship between shuttle turns and near-month bids for shuttle service in the secondary auction markets, where each point represents a week of data. In general, low turns are associated with high shuttle bids, and high turns are associated with low bids. However, for any level of grain shuttle turns, shuttle market bids are still variable. One factor behind the variability is that railroads can adjust the number of shuttle trains in operation. Additionally, all else equal, high grain rail demand will drive up auction market rates, and low grain rail demand will lower auction market rates.

Figure 3. Weekly secondary market shuttle bids/offers compared to shuttle turns, March 2017 – May 2023



Source: USDA, Agricultural Marketing Service analysis of data from the Surface Transportation Board and data from The Malsam Company, Tradewest Brokerage Company.

Figure 4. Near-month secondary auction market shuttle bids/offers, January 2021 – May 2023



Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company, Tradewest Brokerage Company.

Recent secondary auction results. Figure 4 shows average near-month secondary auction bids since 2021. To a degree, the overall trends in shuttle turns (and, by extension, rail service issues) are reflected in the auction market trends. Turns were low in 2022, especially in the spring. At the same time, STB held its conference on "Urgent Issues in Freight Rail Service" in April. Secondary bids/offers hit a peak of over $1,600 per car in April. Toward the end of 2022, BNSF had slightly improved turns, but UP's turns fell significantly. In October 2022, during grain harvest, secondary auction bids/offers hit a second peak of over $1,750 per car. So far, in 2023, as turns have improved for BNSF and UP, bids for shuttle train service in the secondary auction markets have come down significantly from the high levels of 2022. However, low export demand for U.S. grain (***GTR* table 11**)—stemming from high U.S. grain prices and steep competition from Brazil (*GTR*, May 11, 2023)—has likely also contributed to the low auction market rates.

Looking Forward

Marketing year (MY) 2023/24 corn and soybean harvests are expected to be large, and the question is whether the increased demand will result in degraded rail service and lower shuttle turns. In the secondary market, values are currently negative for shuttles this summer. October shuttles traded for $750 per car in April. This is below the same time last year—when October shuttles were trading for over $1,200 per car—but it is close to the average for previous years. The relatively modest bids in April suggest shippers are not currently expecting the same level of disruptions as seen during the MY 2022/23 harvest.

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[3] Sometimes values in the secondary market can be negative (discount to tariff). This is because canceling a shuttle contract with the railroad results in a penalty and the forfeiture of all remaining trips in the contract. To avoid the consequences of canceling a contract, shuttle owners may sell trips for a loss on the secondary market.

[4] For additional background on the relationship between shuttle turns and the secondary market, see *Dynamic Changes in Rail Shipping Mechanisms for Grain* (2020) by William W. Wilson.

Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
05/31/23	259	320	242	142	224	195
05/24/23	261	322	242	152	228	200

[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.

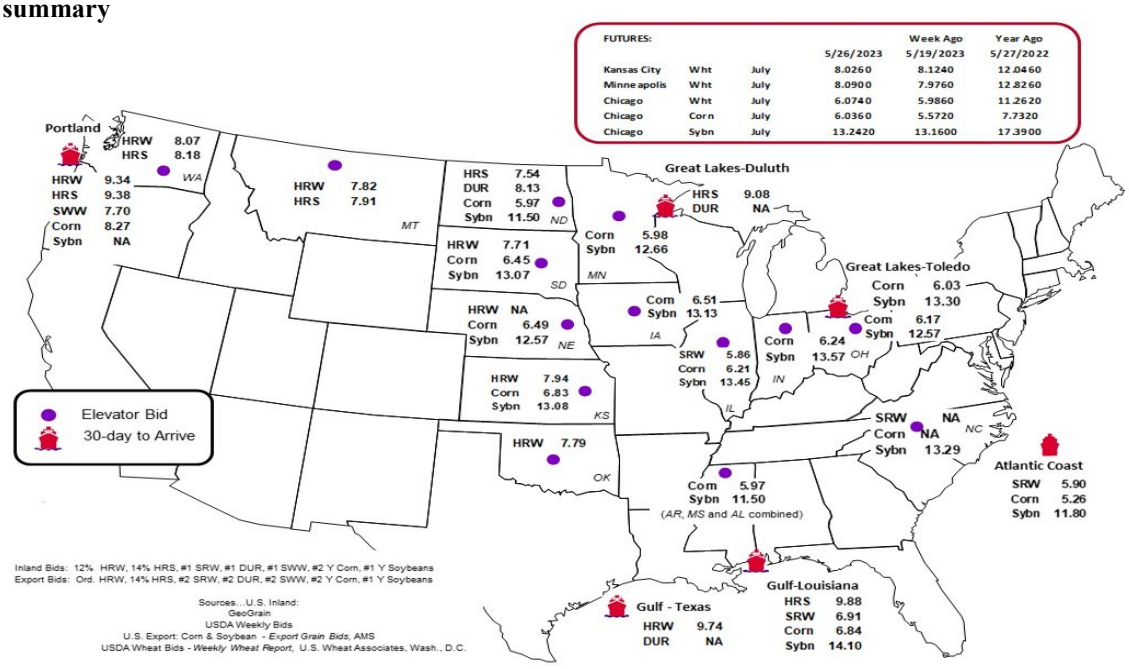
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	5/26/2023	5/19/2023
Corn	IL–Gulf	-0.63	-0.68
Corn	NE–Gulf	-0.35	-0.38
Soybean	IA–Gulf	-0.97	-0.97
HRW	KS–Gulf	-1.80	-1.89
HRS	ND–Portland	-1.84	-1.83

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)

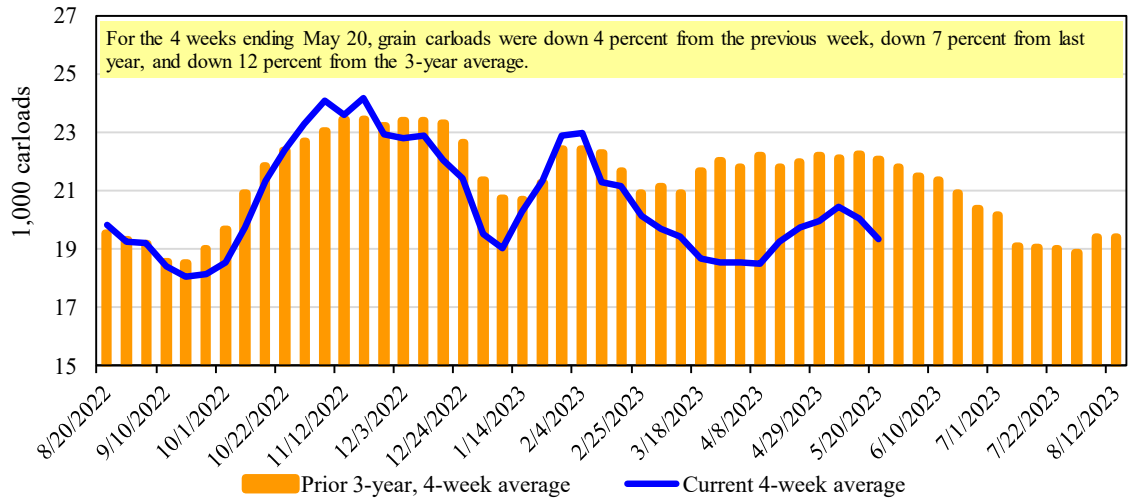
For the week ending:	East		West		U.S. total	Central U.S./Canada	
5/20/2023	CSXT	NS	BNSF	UP		CPKC	CN
This week	1,370	2,744	8,837	4,856	17,807	4,288	3,513
This week last year	1,428	2,424	11,728	4,827	20,407	4,507	2,790
2023 YTD	39,329	53,585	194,926	114,707	402,547	114,862	97,882
2022 YTD	36,736	47,177	231,943	117,648	433,504	93,421	69,474
2023 YTD as % of 2022 YTD	107	114	84	98	93	123	141
Last 4 weeks as % of 2022	94	109	83	107	101	123	121
Last 4 weeks as % of 3-yr. avg.	91	111	78	95	95	123	95
Total 2022	93,313	130,442	570,232	296,945	1,090,932	269,138	214,090

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							
5/25/2023		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	no offer	0	no offer	no offer
	COT grain single-car	0	no offer	0	0	0	0	0	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.

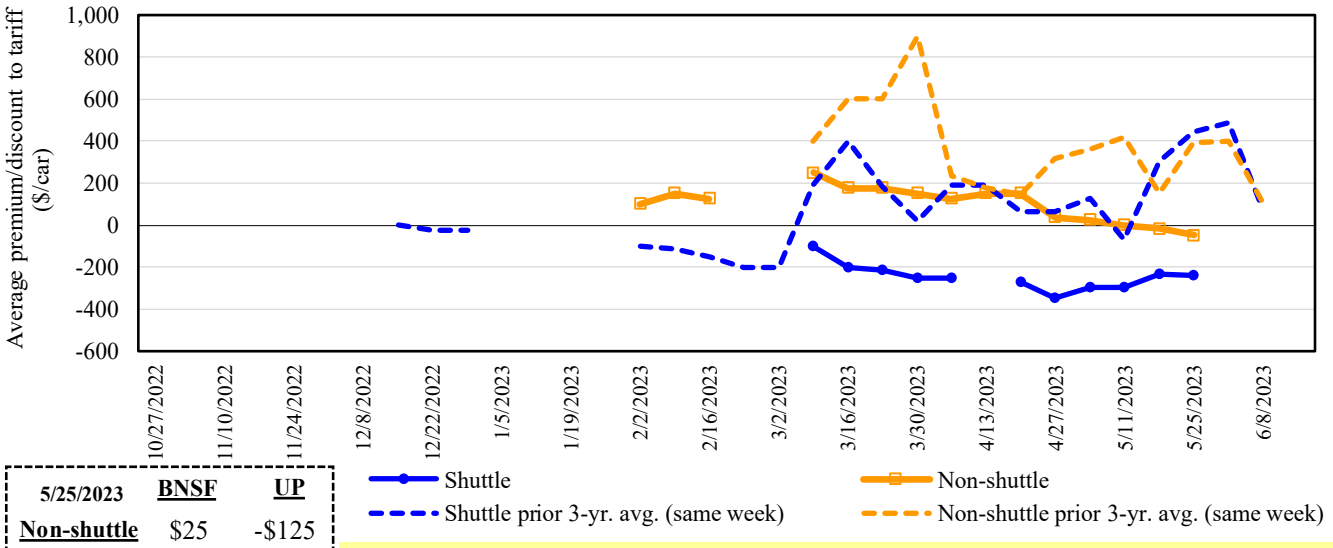
[3]BNSF - COT = BNSF Railway Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[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

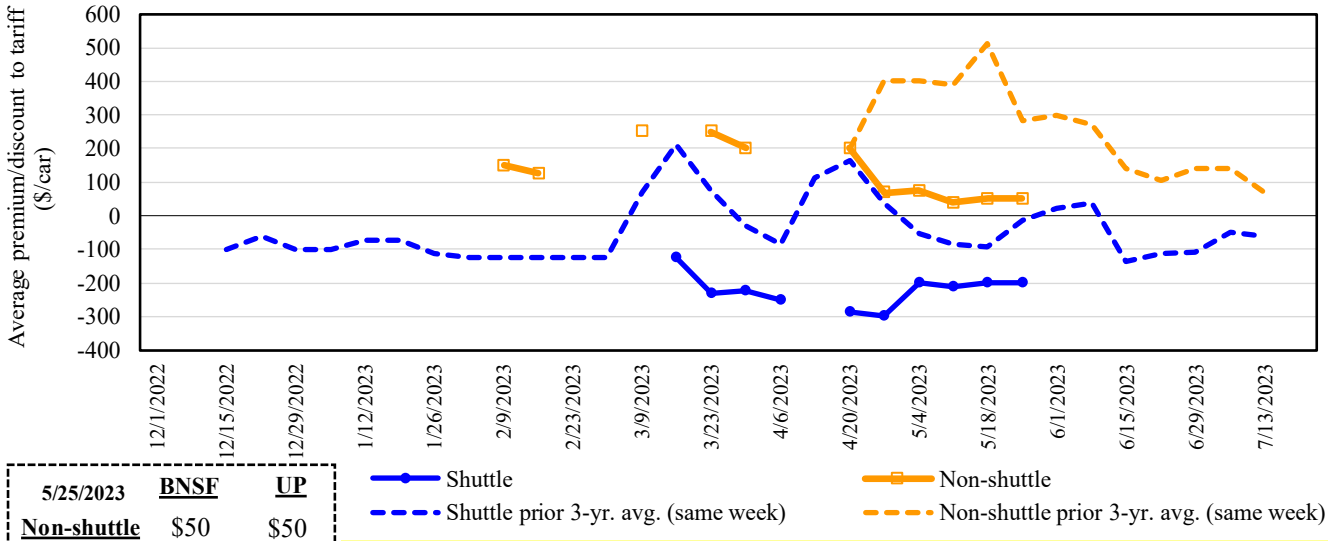


5/25/2023	BNSF	UP
Non-shuttle	$25	-$125
Shuttle	-$275	-$200

Average non-shuttle bids/offers fell $31 this week, and are $300 below the peak.
Average shuttle bids/offers fell $6 this week and are $138 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



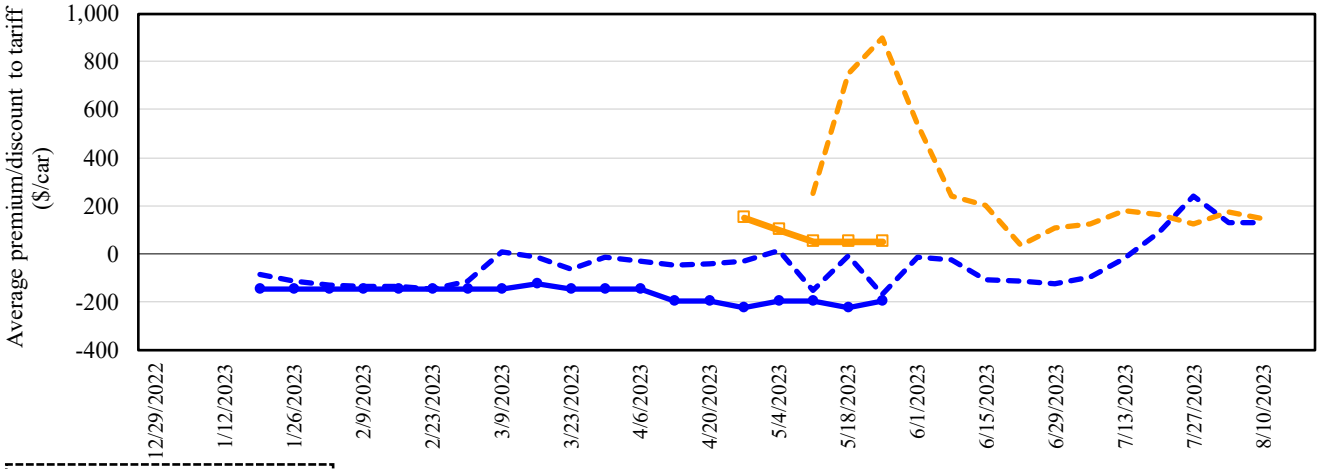
5/25/2023	BNSF	UP
Non-shuttle	$50	$50
Shuttle	-$200	-$200

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



5/25/2023	BNSF	UP
Non-shuttle	n/a	$50
Shuttle	-$200	-$200

Average non-shuttle bids/offers are unchanged this week, and are $100 below the peak.
Average shuttle bids/offers rose $25 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.

Table 5

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

	For the week ending:	Delivery period					
	5/25/2023	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23
Non-shuttle	**BNSF-GF**	**25**	**50**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(25)	0	n/a	n/a	n/a	n/a
	Change from same week 2022	(200)	50	n/a	n/a	n/a	n/a
	UP-Pool	**(125)**	**50**	**50**	**n/a**	**n/a**	**n/a**
	Change from last week	(37)	0	0	n/a	n/a	n/a
	Change from same week 2022	(1,325)	(850)	(850)	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(275)**	**(200)**	**(200)**	**(175)**	**n/a**	**n/a**
	Change from last week	(12)	0	50	13	n/a	n/a
	Change from same week 2022	(550)	(125)	(100)	(83)	n/a	n/a
	UP-Pool	**(200)**	**(200)**	**(200)**	**0**	**n/a**	**n/a**
	Change from last week	0	0	0	0	n/a	n/a
	Change from same week 2022	(3,325)	(967)	n/a	n/a	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							
					Tariff rate plus fuel surcharge per:		Percent change[4]
Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	metric ton[3]	bushel[3]	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.

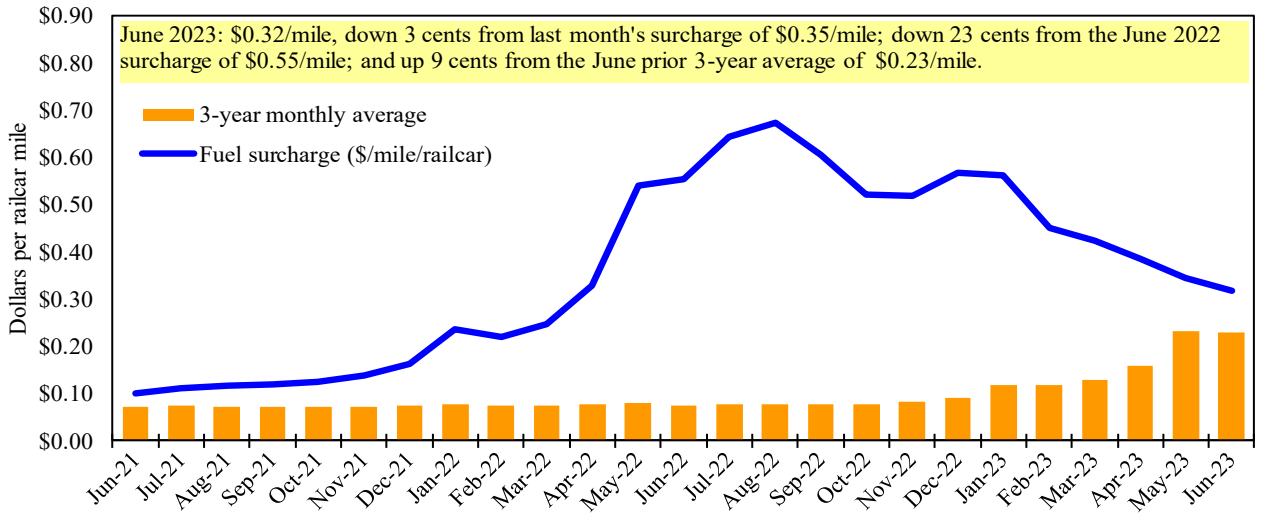
[5] As of January 1, 2022, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico.

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]

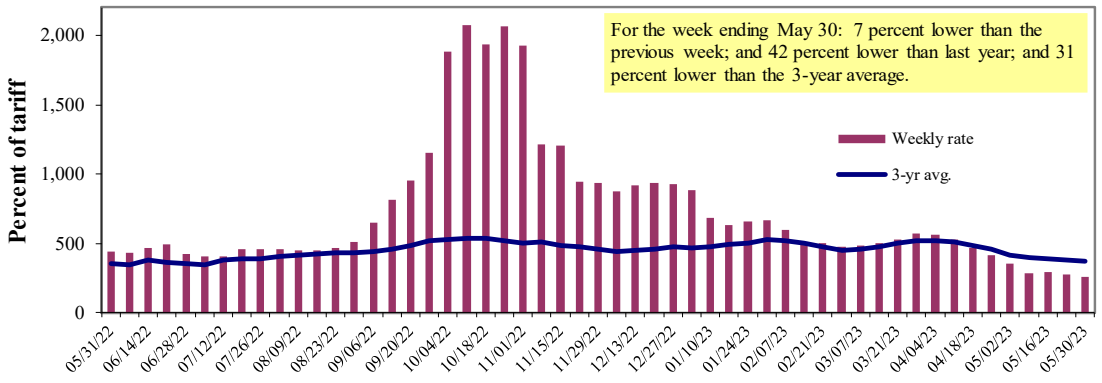


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

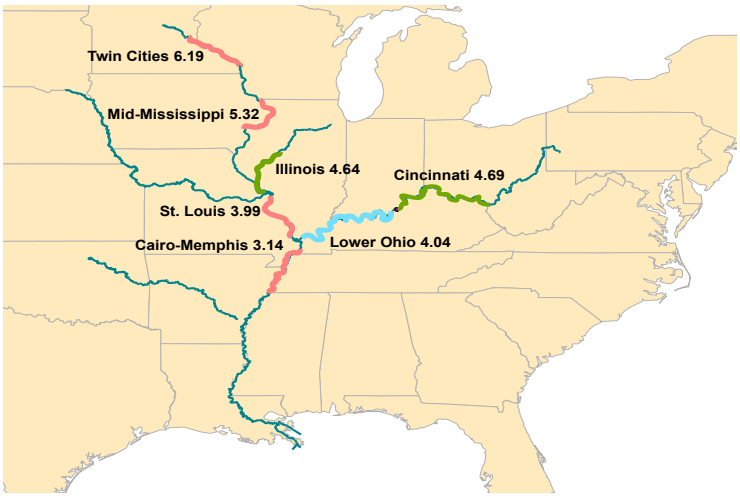
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	5/30/2023	361	289	255	203	223	223	210
	5/23/2023	407	319	273	211	227	227	211
$/ton	5/30/2023	22.35	15.37	11.83	8.10	10.46	9.01	6.59
	5/23/2023	25.19	16.97	12.67	8.42	10.65	9.17	6.63
Current week % change from the same week:								
	Last year	-34	-41	-42	-33	-45	-45	-29
	3-year avg. [2]	-22	-26	-31	-23	-25	-25	-14
Rate[1]	June	375	294	272	211	228	228	213
	August	452	409	394	356	395	395	351

[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

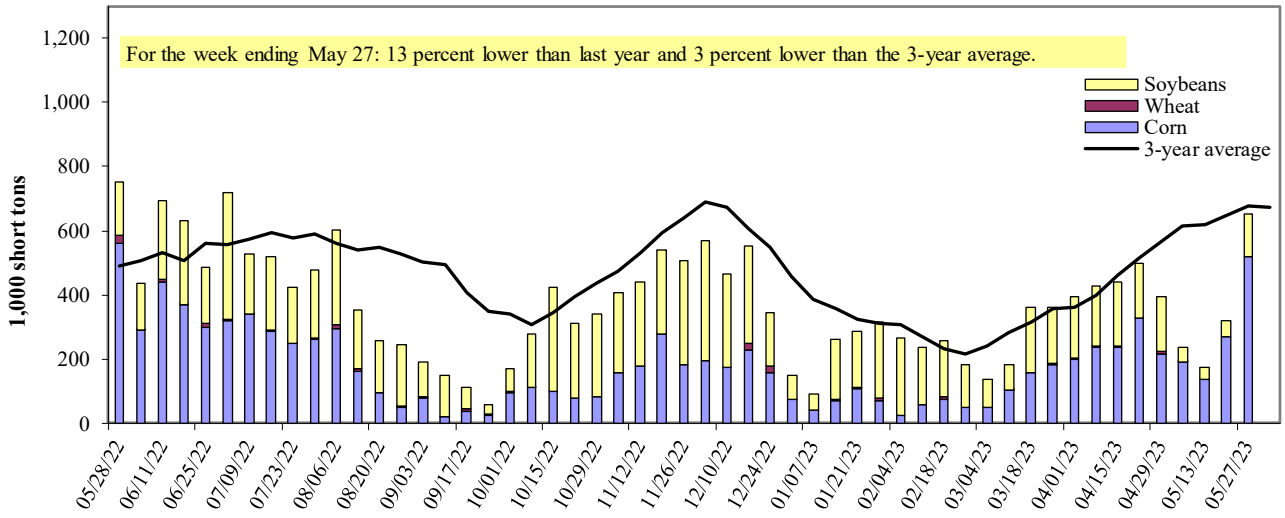
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 05/27/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	182	0	86	0	268
Winfield, MO (L25)	304	0	86	0	390
Alton, IL (L26)	543	0	125	0	668
Granite City, IL (L27)	521	0	133	0	654
Illinois River (La Grange)	149	0	30	0	179
Ohio River (Olmsted)	110	0	25	0	134
Arkansas River (L1)	1	13	2	0	16
Weekly total - 2023	632	13	159	0	804
Weekly total - 2022	648	56	243	0	947
2023 YTD[1]	6,171	531	5,119	152	11,973
2022 YTD[1]	8,595	689	5,046	125	14,454
2023 as % of 2022 YTD	72	77	101	122	83
Last 4 weeks as % of 2022[2]	72	65	37	103	61
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.

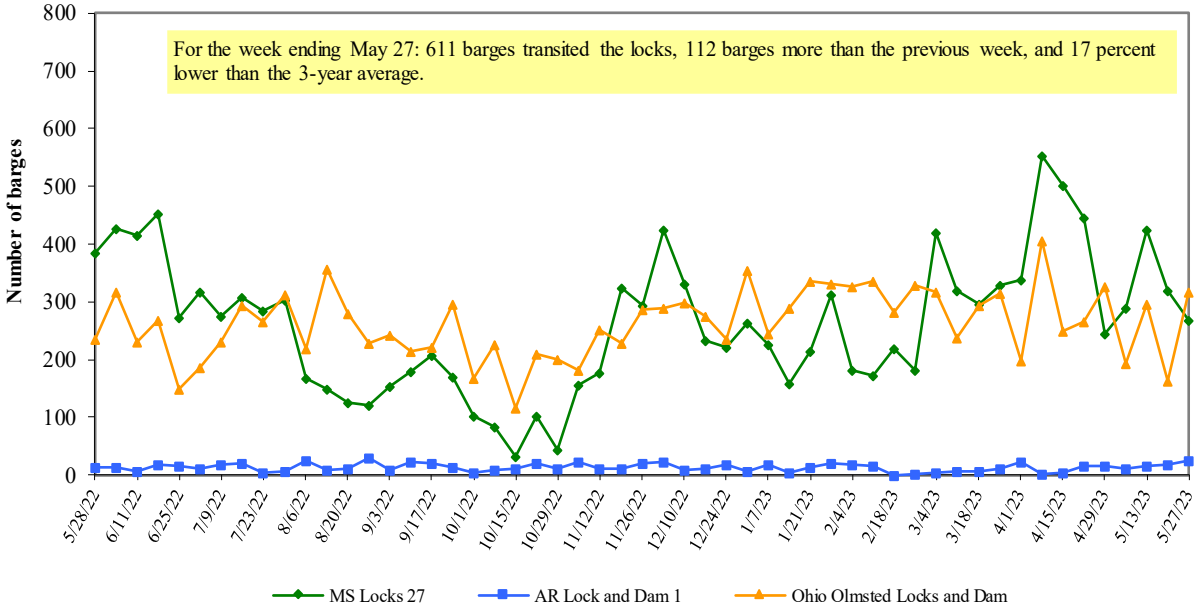
[2] As a percent of same period in 2022.

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 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

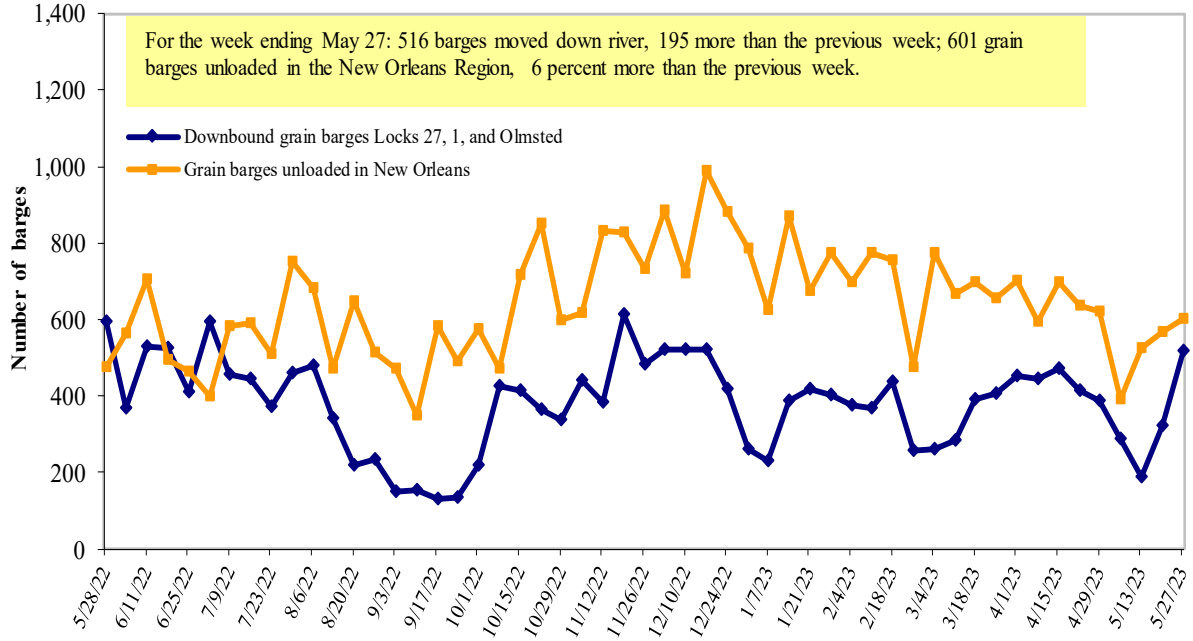


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

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 5/29/2023 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.886	-0.026	-1.962
	New England	4.144	-0.022	-2.082
	Central Atlantic	4.190	-0.008	-2.035
	Lower Atlantic	3.747	-0.033	-1.805
II	Midwest	3.781	-0.029	-1.466
III	Gulf Coast	3.555	-0.024	-1.625
IV	Rocky Mountain	4.077	-0.011	-1.417
V	West Coast	4.540	-0.046	-1.594
	West Coast less California	4.305	-0.073	-1.365
	California	4.810	-0.015	-1.732
Total	United States	3.855	-0.028	-1.684

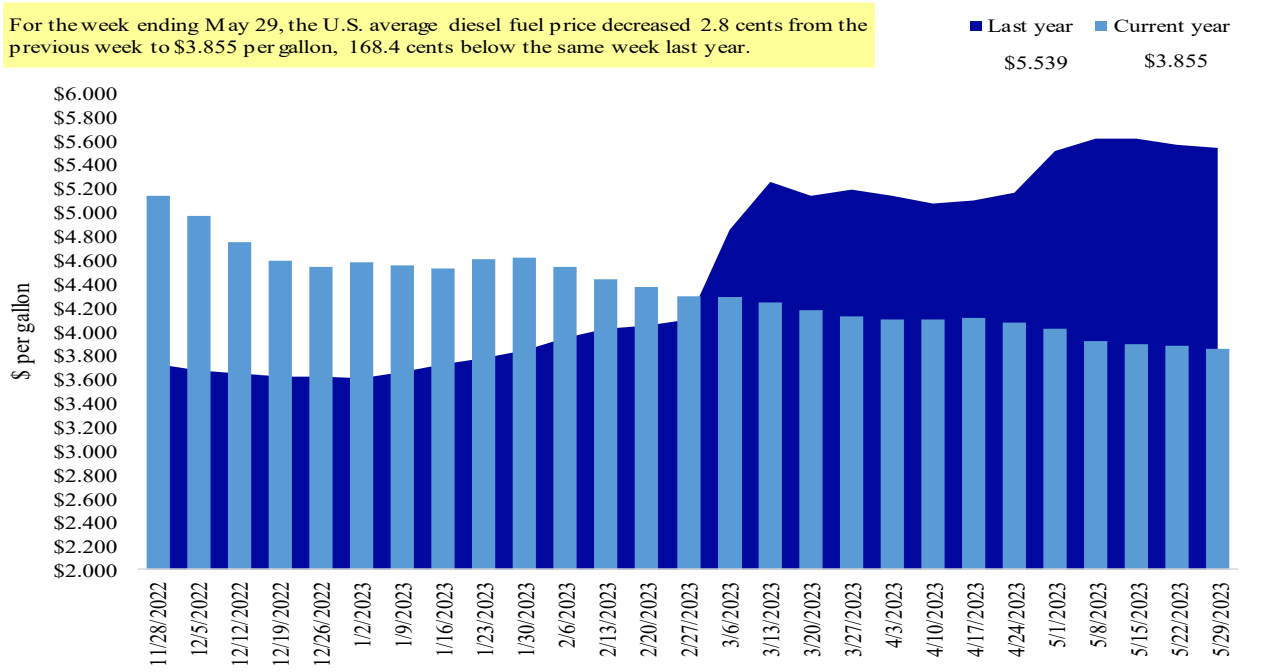
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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]									
5/18/2023	365	272	565	290	59	1,551	8,873	2,941	13,365
This week year ago	491	139	480	169	1	1,279	14,335	10,225	25,839
Cumulative exports-marketing year [2]									
2022/23 YTD	4,758	2,635	5,184	4,320	393	17,290	29,106	47,899	94,296
2021/22 YTD	6,983	2,732	5,045	3,202	196	18,157	44,721	49,194	112,072
YTD 2022/23 as % of 2021/22	68	96	103	135	201	95	65	97	84
Last 4 wks. as % of same period 2021/22	92	244	143	286	18,805	160	77	32	63
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 5/18/2023	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	14,151	15,752	(10)	15,227
China	272	7,434	14,673	(49)	12,616
Japan	473	5,841	9,086	(36)	10,273
Columbia	0	1,990	4,215	(53)	4,398
Korea	0	783	1,266	(38)	2,563
Top 5 importers	**2,635**	**30,199**	**44,992**	(33)	**45,077**
Total U.S. corn export sales	**2,753**	**37,979**	**59,056**	(36)	**56,665**
% of YTD current month's export projection	5%	84%	94%		
Change from prior week[2]	**52**	**(75)**	**152**		
Top 5 importers' share of U.S. corn export sales	96%	80%	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 5/18/2023	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 -
China	1,051	31,079	30,335	2	27,283
Mexico	88	4,374	5,186	(16)	4,929
Egypt	0	1,109	3,915	(72)	3,553
Japan	95	2,127	2,243	(5)	2,266
Indonesia	0	1,385	1,585	(13)	2,116
Top 5 importers	**1,234**	**40,073**	**43,264**	(7)	**40,147**
Total U.S. soybean export sales	**2,552**	**50,840**	**59,419**	(14)	**54,231**
% of projected exports	5%	93%	101%		
change from prior week[2]	**1**	**115**	**9,211**		
Top 5 importers' share of U.S. soybean export sales	48%	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 5/18/2023	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	423	3,254	3,766	(14)	3,566
Philippines	323	2,221	2,788	(20)	2,985
Japan	257	2,185	2,352	(7)	2,453
China	0	1,167	848	38	1,537
Nigeria	50	808	1,773	(54)	1,528
Korea	121	1,337	1,231	9	1,459
Taiwan	65	851	954	(11)	1,106
Indonesia	0	345	122	183	711
Thailand	48	637	559	14	703
Colombia	24	536	691	(22)	621
Top 10 importers	**1,309**	**13,339**	**15,082**	(12)	**16,669**
Total U.S. wheat export sales	**2,208**	**18,841**	**19,436**	(3)	**22,763**
% of projected exports	11%	89%	89%		
change from prior week[2]	**245**	**(45)**	**(2)**		
Top 10 importers' share of U.S. wheat export sales	59%	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)

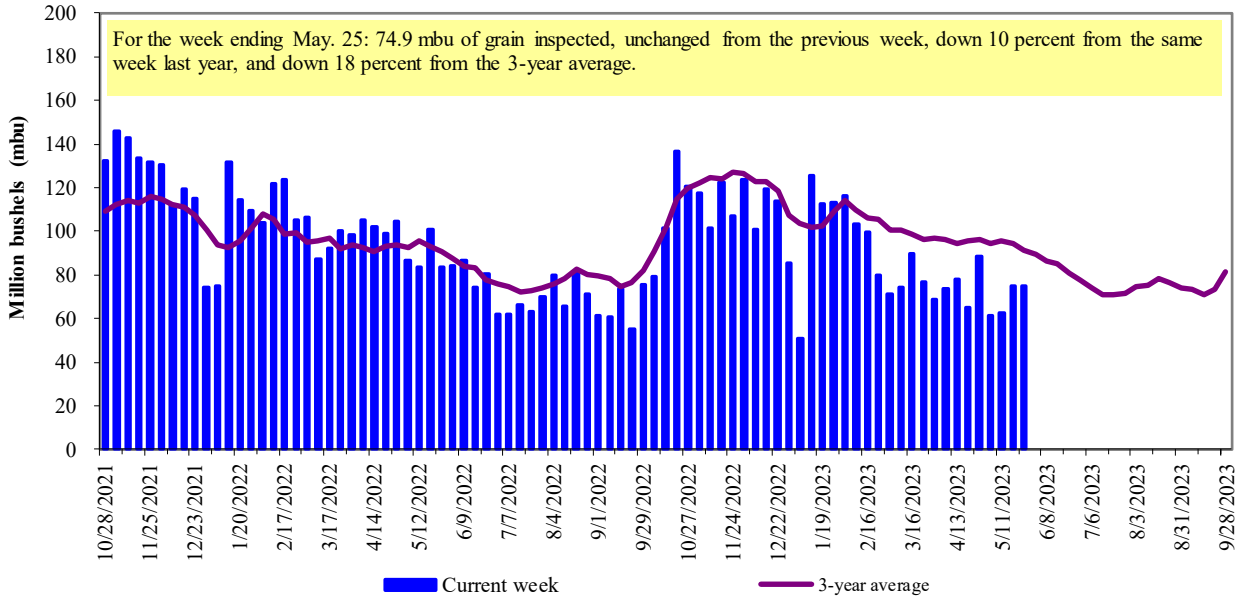
Port regions	For the week ending 05/25/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2022 total*
Pacific Northwest									
Wheat	218	294	74	4,415	3,843	115	135	70	9,836
Corn	385	314	123	3,195	6,196	52	83	83	9,615
Soybeans	0	0	n/a	3,521	4,337	81	37	60	14,178
Total	**603**	**608**	**99**	**11,131**	**14,377**	**77**	**90**	**77**	**33,629**
Mississippi Gulf									
Wheat	73	53	138	1,191	1,627	73	68	79	4,053
Corn	699	840	83	11,429	18,084	63	84	75	30,781
Soybeans	164	89	184	12,500	10,500	119	44	59	31,283
Total	**935**	**982**	**95**	**25,121**	**30,211**	**83**	**72**	**72**	**66,116**
Texas Gulf									
Wheat	85	54	158	1,146	1,389	82	84	75	3,421
Corn	10	0	n/a	99	315	31	38	54	648
Soybeans	0	0	n/a	52	2	n/a	n/a	n/a	685
Total	**96**	**54**	**178**	**1,297**	**1,706**	**76**	**75**	**72**	**4,754**
Interior									
Wheat	24	51	47	1,044	1,174	89	93	93	2,912
Corn	190	149	127	3,821	3,781	101	94	90	8,961
Soybeans	80	77	104	2,738	3,050	90	68	69	7,109
Total	**294**	**278**	**106**	**7,604**	**8,005**	**95**	**85**	**84**	**18,982**
Great Lakes									
Wheat	2	10	17	123	86	143	n/a	64	395
Corn	0	0	n/a	23	83	27	52	135	158
Soybeans	0	0	n/a	31	183	17	0	0	760
Total	**2**	**10**	**17**	**176**	**351**	**50**	**48**	**54**	**1,312**
Atlantic									
Wheat	0	2	11	45	37	122	n/a	n/a	169
Corn	7	0	n/a	65	105	62	35	104	309
Soybeans	8	9	90	1,162	1,288	90	19	42	2,867
Total	**16**	**11**	**138**	**1,272**	**1,430**	**89**	**22**	**52**	**3,345**
U.S. total from ports*									
Wheat	402	463	87	7,964	8,155	98	106	75	20,786
Corn	1,291	1,303	99	18,632	28,564	65	84	79	50,471
Soybeans	252	175	144	20,004	19,360	103	44	59	56,882
Total	**1,945**	**1,942**	**100**	**46,601**	**56,079**	**83**	**77**	**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)

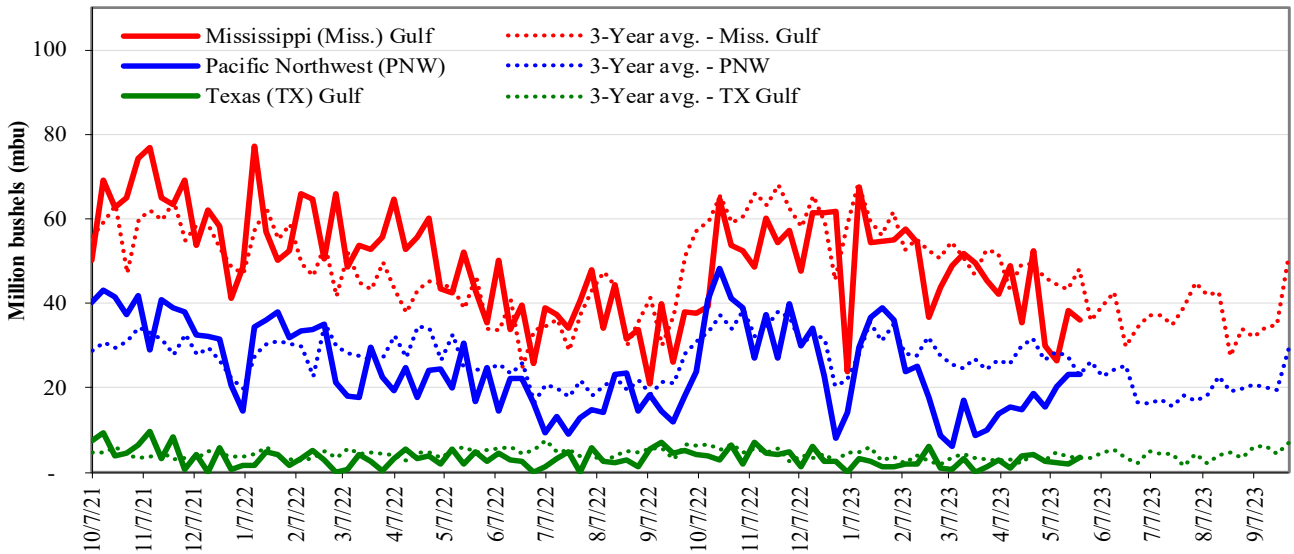


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 05/25/23 inspections (mbu):		Percent change	MS Gulf	TX	U.S. Gulf	PNW
MS Gulf:	36.2	Last wk:	down 5	up 79	down 1	unchanged
PNW:	23.2	Last Year (same wk):	down 16	down 25	down 17	up 38
TX Gulf:	3.5	3-yr avg. (4-wk. mov. Avg):	down 20	down 4	down 19	down 12

Source: USDA, Federal Grain Inspection Service.

Table 16

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

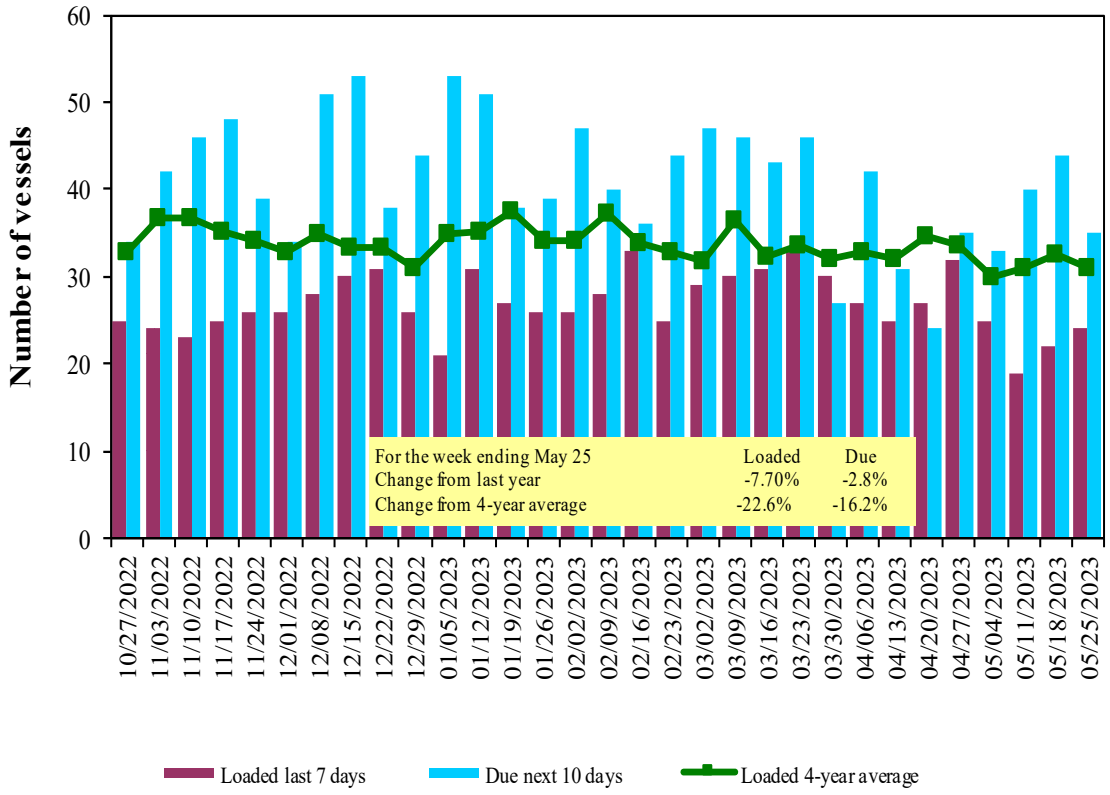
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
5/25/2023	17	24	35	15
5/18/2023	11	22	44	14
2022 range	(14…61)	(18…39)	(28...62)	(5…23)
2022 average	30	28	44	13

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

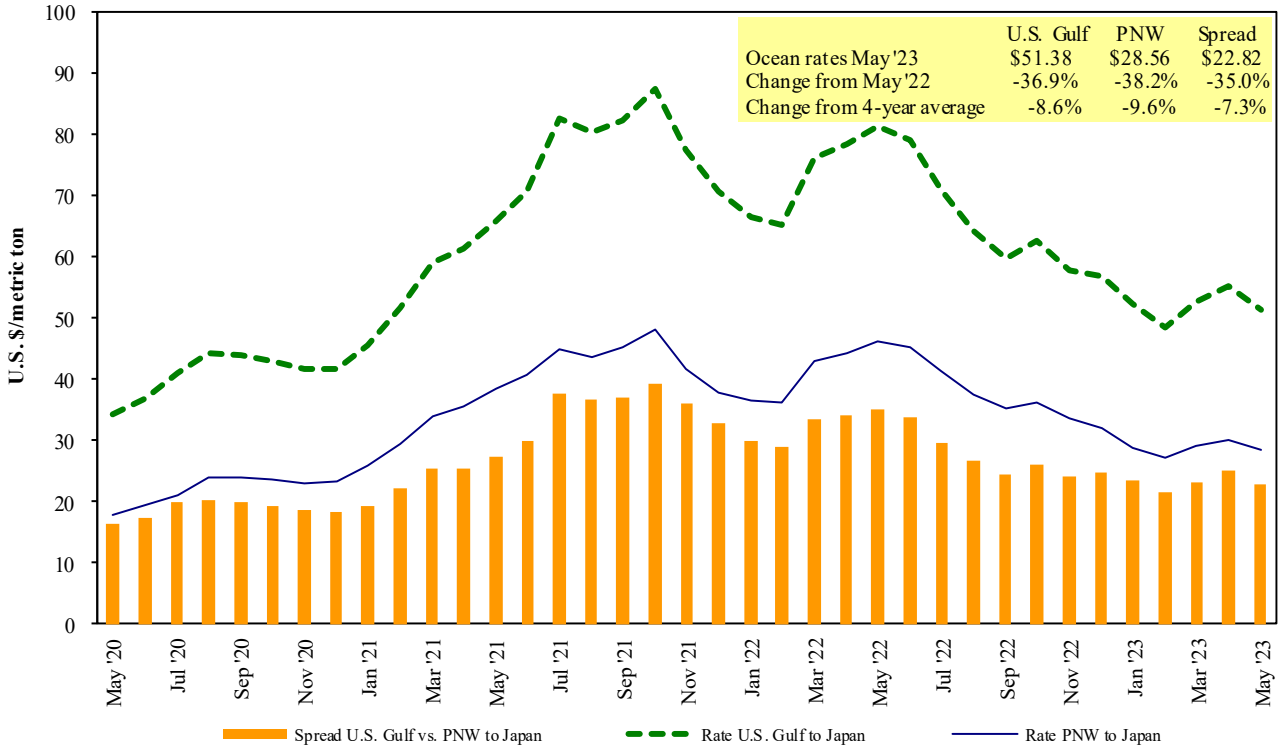


[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

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 05/27/2023

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

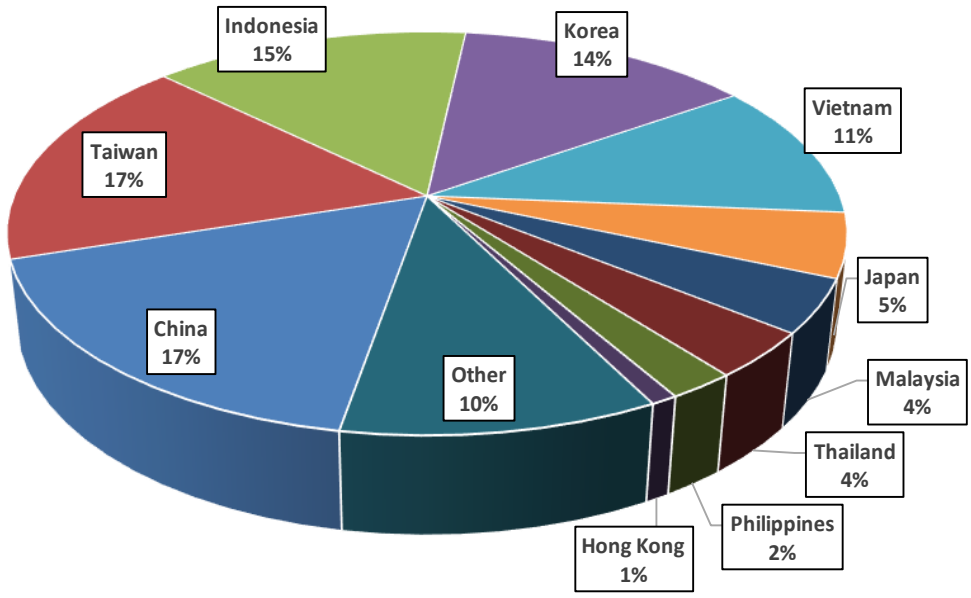
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

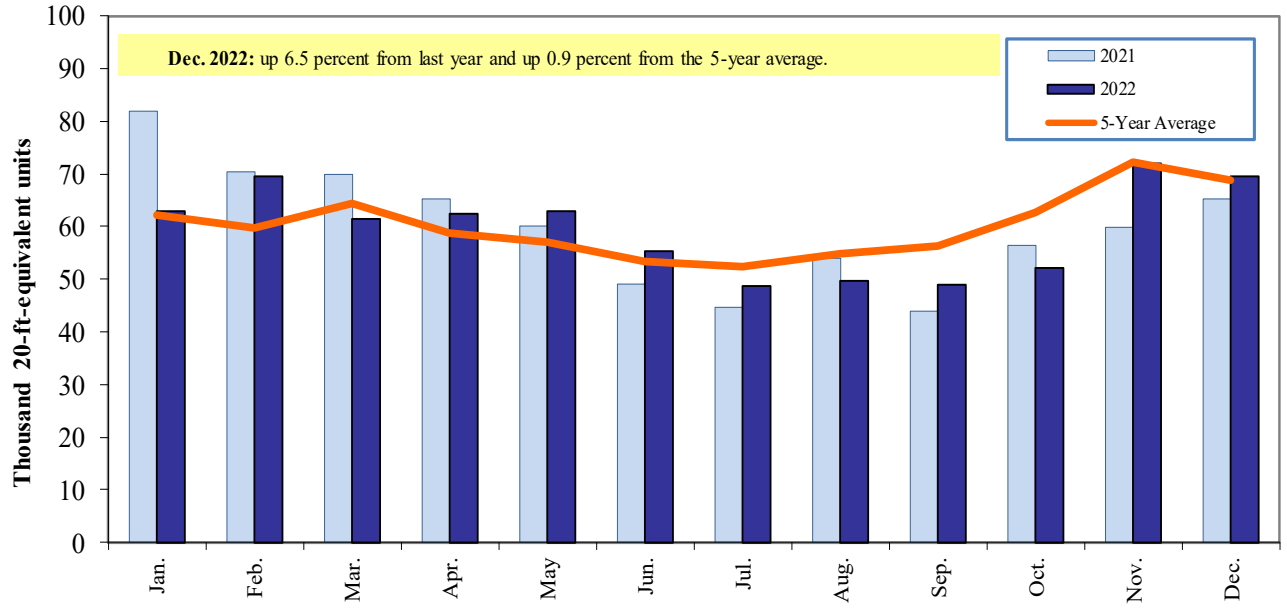
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2022



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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