United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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June 22, 2023

Contents

The next release is June 29, 2023

WEEKLY HIGHLIGHTS

Panama Canal Imposes Additional Draft Limits as Drought Worsens

In addition to previous draft restrictions starting in March, the Panama Canal (Canal) has issued new restrictions in June, affecting both container and bulk vessel transits. According to the *Wall Street Journal*, Panama is having its worst drought in over a century, and water levels in Gatún Lake—the water source for the Canal—could hit record lows by July. Starting July 19, draft restrictions within the Canal's Neopanamax locks (normally, 50 feet) will be reduced to 43 feet. The Neopanamax locks are used by large container vessels (*Grain Transportation Report*, May 25, 2023), and some container ocean carriers have imposed per container surcharges for services transiting the canal. Also, beginning July 19, draft restrictions within the Canal's older Panamax locks (normally, 39.5 feet) will be reduced to 38.5 feet. This restriction will affect the largest bulk vessels carrying U.S.-originated grain.

FMC Issues Proposed Rulemaking on Unreasonable Refusal To Deal

On June 14, The Federal Maritime Commission (FMC) issued a supplemental notice of proposed rulemaking (SNPRM) about how FMC would implement its prohibition on common carriers' unreasonably refusing available cargo space to shippers. This SNPRM follows and clarifies a previous one on the same issue (*Grain Transportation Report*, September 29, 2022). The Ocean Shipping Reform Act of 2022 tasked the FMC with defining "refusal to deal" and "vessel space accommodation." In January, the Secretary of Agriculture sent a letter to FMC, encouraging it to broaden the definition of an "unreasonable refusal" to negotiate or deal, narrow the proposal's guidance on reasonableness, and encourage specific actions by carriers to guard against engaging in unreasonable refusal. Stakeholders are welcome to comment on the SNPRM until July 31.

Diesel Prices Rise After 8-Week Decline

For the week ending June 19, the U.S. average **diesel fuel price** rose 2.1 cents from the previous week to $3.815 per gallon—199.5 cents below the same week last year. Diesel prices rose in 7 of the 10 regions, with the biggest increase of 4.3 cents occurring in the Gulf Coast region. Following a 1.8-cents increase for the week ending April 17, diesel prices have continuously declined. The current price rise marks only the fifth time this year that prices have risen. According to the Energy Information Administration's (EIA), June *Short Term Energy Outlook*, retail diesel prices are expected to average $3.95 per gallon in 2023 and $3.82 per gallon in 2024, down from $5.02 per gallon in 2022.

Grain Inspections Down From Previous Week

For the week ending June 15, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions were 1.16 million metric tons (mmt). This was down 26 percent from the previous week, down 40 percent from last year, and down 48 percent from the 3-year average. From the previous week, inspections dropped 15 percent for wheat and fell 34 percent for corn, but rose 14 percent for soybeans. During the last 4 weeks, grain inspections were 25 percent below the same period last year and 27 percent below the 3-year average. From the previous week, inspections of grain decreased 71 percent in the Pacific Northwest (PNW) and decreased 6 percent in the Mississippi Gulf.

Snapshots by Sector

Export Sales

For the week ending June 8, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 12.28 million metric tons (mmt), down 5 percent from last week and down 50 percent from the same time last year. Net **corn export sales** for MY 2022/23 were 0.273, up 58 percent from last week. Net **soybean export sales** were 0.478 mmt, up 131 percent from last week. Net weekly **wheat export sales** for MY 2023/24, which began on June 1, were 0.165 mmt.

Rail

U.S. Class I railroads originated 16,523 **grain carloads** during the week ending June 10. This was a 4-percent increase from the previous week, 17 percent fewer than last year, and 22 percent fewer than the 3-year average.

Average July **shuttle secondary railcar bids/offers** (per car) were $328 below tariff for the week ending June 15. This was $3 less than last week and $257 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $6 above tariff. This was $13 more than last week and $244 lower than this week last year.

Barge

For the week ending June 17, **barged grain movements** totaled 488,600 tons. This was 17 percent more than the previous week and 37 percent less than the same period last year.

For the week ending June 17, 305 grain barges **moved down river**—40 more than last week. There were 457 grain barges **unloaded** in the New Orleans region, 10 percent fewer than last week.

Ocean

For the week ending June 15, 22 **oceangoing grain vessels** were loaded in the Gulf—8 percent fewer than the same period last year. Within the next 10 days (starting June 16), 29 vessels were expected to be loaded—24 percent fewer than the same period last year.

As of June 15, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $48.50. This was 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was $27.00 per mt, 2 percent more than the previous week.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* June 22, 2023.
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Feature Article/Calendar

Corn and Soybean Transportation Costs Fell in First Quarter 2023

From fourth quarter 2022 to first quarter 2023 (quarter to quarter), transportation costs to ship corn and soybeans from Minneapolis, MN, to Japan decreased—both via the U.S. Gulf (Gulf route) and via the Pacific Northwest (PNW route). From first quarter 2022 to first quarter 2023 (year to year), costs to ship corn and soybeans by the U.S. Gulf route decreased, mainly because of a drop in barge, ocean, and truck transportation rates. For the same period, costs to ship by the PNW route decreased for corn and soybeans, primarily because of lower truck and ocean freight rates (see tables 1 and 2).

The year-to-year decrease in ocean rates reflected lower global demand for shipping, due to an earlier-than-usual start of the Chinese Lunar New Year (which started 1 week earlier than usual) (*Grain Transportation Report* (GTR), May 4, 2023). Total landed costs for shipping corn and soybeans by the U.S. Gulf route decreased from quarter to quarter and varied from year to year (i.e., rose for corn and fell for soybeans). For shipping by the PNW route, total landed costs increased both from quarter to quarter and from year to year.

Table 1: Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	1st qtr. '22	4th qtr. '22	1st qtr. '23	Yr. to yr.	Qtr. to qtr.	1st qtr. '22	4th qtr. '22	1st qtr. '23	Yr. to yr.	Qtr. to qtr.
Truck	16.67	16.31	14.75	-11.52	-9.56	16.67	16.31	14.75	-11.52	-9.56
Barge[1]	29.07	94.50	19.86	-31.68	-78.98	29.07	94.50	19.86	-31.68	-78.98
Rail[2]	41.74	n/a	46.27	10.85	n/a	38.04	n/a	42.67	12.17	n/a
Ocean	69.31	59.07	51.12	-26.24	-13.46	69.31	59.07	51.12	-26.24	-13.46
Total transportation cost	156.79	169.88	132.00	-15.81	-22.30	153.09	169.88	128.40	-16.13	-24.42
Farm value[3]	228.60	246.97	256.68	12.28	3.93	527.88	509.51	541.36	2.55	6.25
Total landed cost	385.39	416.85	388.68	0.85	-6.76	680.97	679.39	669.76	-1.65	-1.42
Transportation % landed cost[4]	40.68	40.75	33.96	-6.72	-6.79	22.48	25.00	19.17	-3.31	-5.83

Table 2: Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	1st qtr. '22	4th qtr. '22	1st qtr. '23	Yr. to yr.	Qtr. to qtr.	1st qtr. '22	4th qtr. '22	1st qtr. '23	Yr. to yr.	Qtr. to qtr.
Truck	16.67	16.31	14.75	-11.52	-9.56	16.67	16.31	14.75	-11.52	-9.56
Rail	53.43	56.21	56.21	5.20	0.00	60.58	63.56	63.56	4.92	0.00
Ocean	38.47	34.02	28.39	-26.20	-16.55	38.47	34.02	28.39	-26.20	-16.55
Total transportation cost	108.57	106.54	99.35	-8.49	-6.75	115.72	113.89	106.70	-7.79	-6.31
Farm value[3]	228.60	246.97	256.68	12.28	3.93	527.88	509.51	541.36	2.55	6.25
Total landed cost	337.17	353.51	356.03	5.59	0.71	643.60	623.40	648.06	0.69	3.96
Transportation % landed cost[4]	32.20	30.14	27.90	-4.30	-2.23	17.98	18.27	16.46	-1.52	-1.80

[1] First quarter barge rates are from St. Louis to the Gulf, and fourth quarter barge rates are from Minneapolis to the Gulf.

[2] Rail rates quotes are from MN to St. Louis. All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[3] USDA, National Agricultural Statistics Service is the source for corn and soybean prices.

[4] For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences.

Note: qtr. = quarter; yr. = year; n/a = not applicable.

Source: USDA, Agricultural Marketing Service.

U.S. Gulf Costs

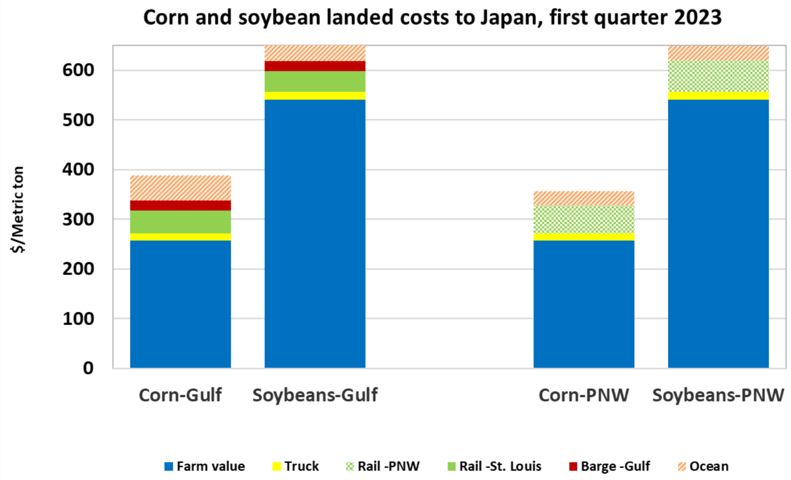
Transportation and landed costs. Quarter to quarter, transportation costs for shipping via the Gulf route decreased 22 percent for corn and fell 24 percent for soybeans (table 1). Year to year, transportation costs fell 16 percent each for corn and soybeans. These declines were mainly due to falling barge, ocean, and truck rates, which were down 32 percent, 26 percent, and 12 percent, respectively. For shipping corn, first-quarter 2023 transportation costs accounted for 34 percent of landed costs, reflecting quarter-to-quarter and year-to-year decreases. For shipping soybeans, first-quarter transportation accounted for 19 percent of landed costs, also reflecting quarter-to-quarter and year-to-year decreases.

During first quarter 2023, Gulf-route total landed costs were roughly $389 per metric ton (mt) for shipping corn and $670 per mt for soybeans (see figure). Quarter to quarter, total landed costs decreased 7 percent for corn and fell 1 percent for soybeans. Both decreases stemmed from lower transportation costs. Year to year, landed costs increased 1 percent for corn and fell 2 percent for soybeans. The increase in corn was driven by higher farm values, and the decrease in soybeans was driven by lower transportation costs.

Inspections. U.S. Gulf inspections of corn for export were down 47 percent year to year and down 6 percent from the 5-year average ([*GTR*, April 27, 2023](#)). First-quarter 2023 U.S. Gulf inspections of corn for export totaled 6.17 million metric tons (mmt), representing 64 percent of total first-quarter U.S. corn inspections. U.S. Gulf inspections of soybeans for export increased 43 percent year to year and rose 35 percent from the 5-year average. U.S. Gulf inspections of soybeans totaled 10 mmt, representing 62 percent of total first-quarter U.S. soybean inspections in first quarter 2023.

Pacific Northwest

Transportation and landed costs. Quarter to quarter, transportation costs for shipping via the PNW route fell 7 percent for corn and fell 6 percent for soybeans (table 2). Ocean and truck rates showed a quarter-to-quarter decrease, while rail rates remained unchanged. Year to year, lower truck and ocean rates pushed transportation costs down 8 percent each for corn and soybeans. First-quarter 2023 transportation costs for shipping corn accounted for 28 percent of the total landed costs for corn, reflecting a quarter-to-quarter decrease. First-quarter 2023 transportation costs for shipping soybeans accounted for 16 percent of the total landed costs for soybeans, reflecting a quarter-to-quarter decrease. Year to year, transportation costs were down for both corn and soybeans.



Note: PNW = Pacific Northwest.
Source: USDA, Agricultural Marketing Service.

First-quarter 2023 total landed costs were roughly $356 per mt for corn and $648 per mt for soybeans (see figure). Quarter to quarter, total landed costs were up 1 percent for corn and up 4 percent for soybeans. Year to year, landed costs increased 6 percent for corn and rose 1 percent for soybeans (table 2).

Inspections. First-quarter 2023 PNW inspections of corn for export fell 71 percent year to year and fell 71 percent below the 5-year average. First-quarter 2023 PNW-route corn exports were 0.96 mmt, representing 10 percent of total first-quarter U.S. corn inspections. First-quarter 2023 soybeans for export decreased 14 percent from year to year and remained unchanged from the 5-year average. First-quarter 2023 PNW-route soybean exports were 3.1 mmt, representing 19 percent of total first-quarter U.S. soybean inspections.

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Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
06/21/23	256	325	237	133	217	191
06/14/23	255	326	238	131	215	188

[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.

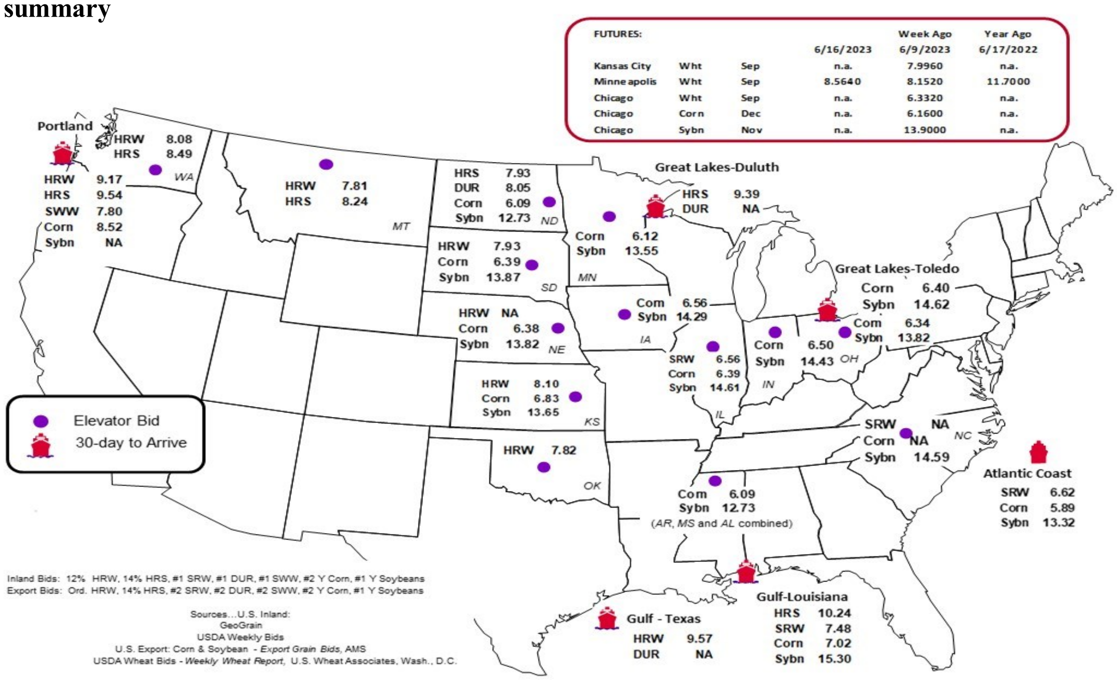
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	6/16/2023	6/9/2023
Corn	IL–Gulf	-0.63	-0.53
Corn	NE–Gulf	-0.64	-0.43
Soybean	IA–Gulf	-1.01	-1.07
HRW	KS–Gulf	-1.47	-1.51
HRS	ND–Portland	-1.61	-1.55

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)

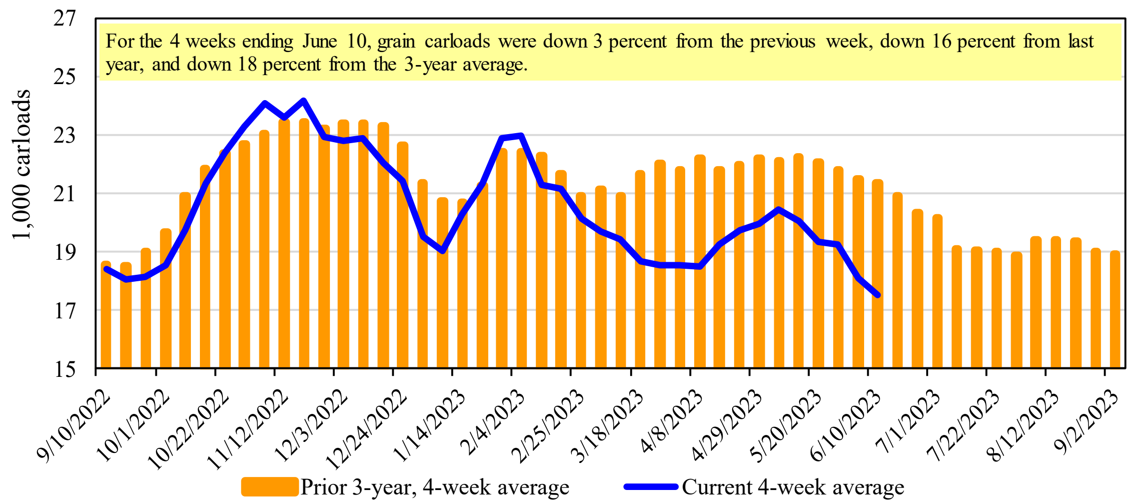
For the week ending: 6/10/2023	East		West		U.S. total	Central U.S./Canada	
	CSXT	NS	BNSF	UP		CPKC	CN
This week	1,630	3,258	6,479	5,156	16,523	4,555	3,638
This week last year	2,018	2,781	9,443	5,689	19,931	7,016	3,299
2023 YTD	44,947	62,562	218,298	129,006	454,813	241,826	108,723
2022 YTD	42,815	55,029	265,473	133,245	496,562	211,340	79,048
2023 YTD as % of 2022 YTD	105	114	82	97	92	114	138
Last 4 weeks as % of 2022	93	114	71	94	84	99	116
Last 4 weeks as % of 3-yr. avg.	97	116	70	85	82	83	98
Total 2022	93,313	130,392	570,232	296,945	1,090,882	538,276	214,108

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

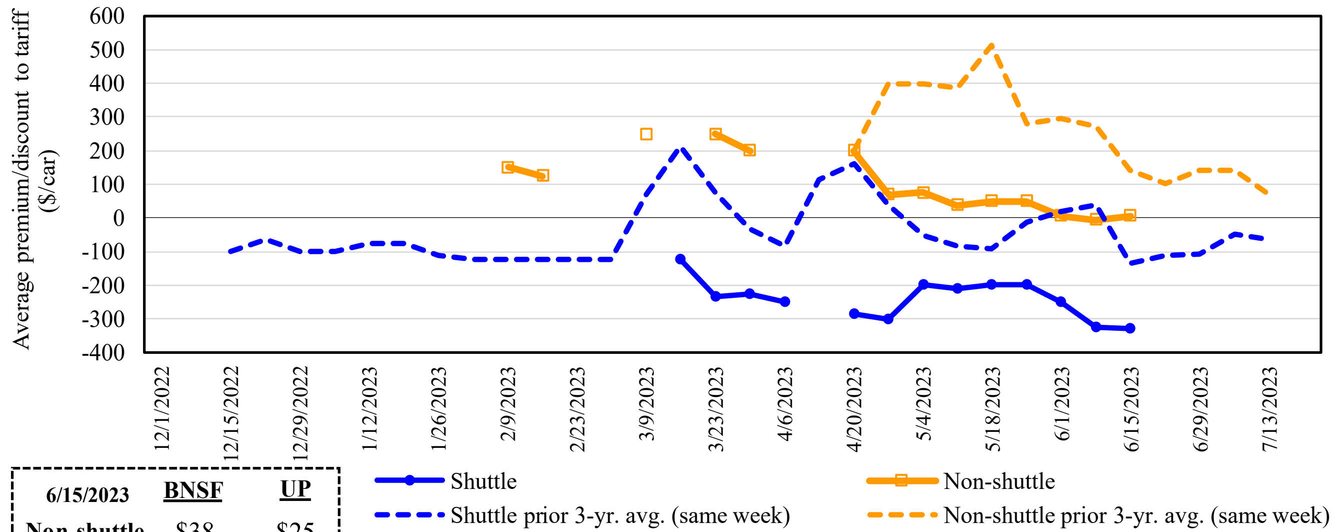
Railcar auction offerings[1] ($/car)[2]

For the week ending: 6/15/2023		Jul-23	Jul-22	Aug-23	Aug-22	Sep-23	Sep-22	Oct-23	Oct-22
		Delivery period							
BNSF	COT grain units	no bids	0	no offer	0	no offer	no offer	no offer	no offer
	COT grain single-car	0	0	0	0	0	no offer	no offer	no offer
UP	GCAS/vouchers	no offer	n/a	no offer	n/a	no offer	n/a	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.
Note: BNSF = BNSF Railway; COT = Certificate of Transportation; UP = Union Pacific Railroad; and GCAS = Grain Car Allocation System.
Minimum bids for UP GCAS/vouchers are $10.
Source: USDA, Agricultural Marketing Service.

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 July 2023

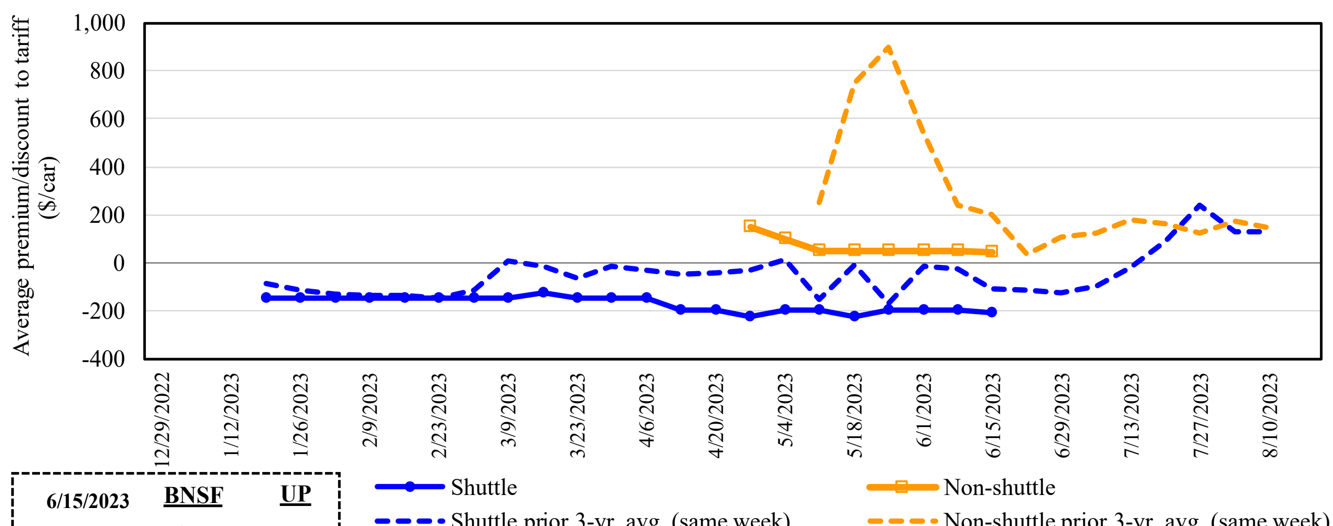


6/15/2023	BNSF	UP
Non-shuttle	$38	-$25
Shuttle	-$256	-$400

Average non-shuttle bids/offers rose $13 this week, and are $244 below the peak.
Average shuttle bids/offers fell $3 this week and are $203 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 August 2023



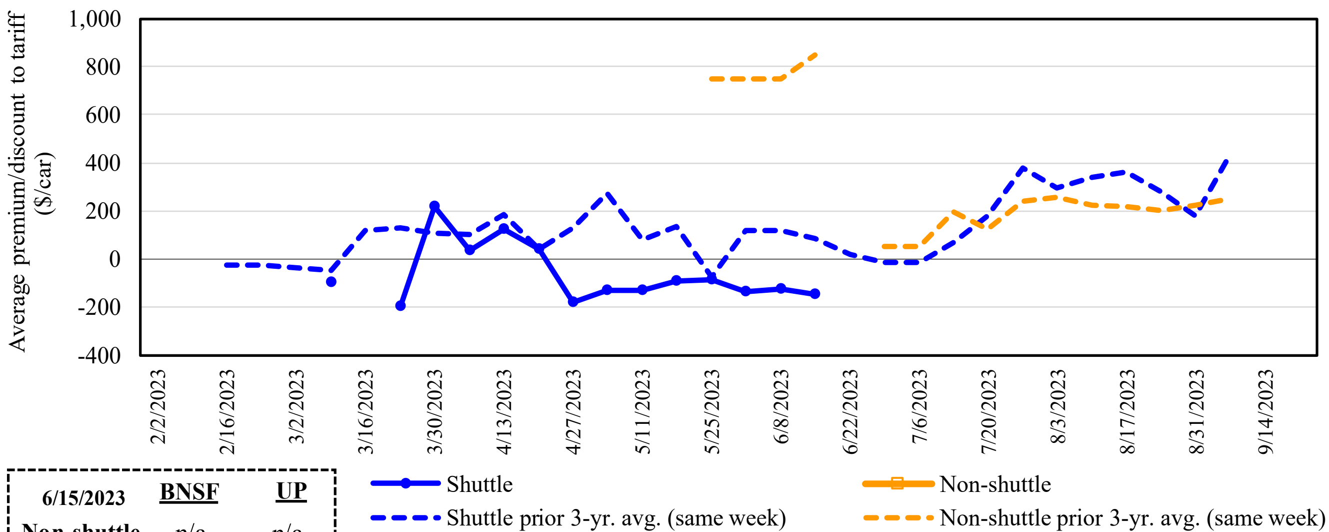
6/15/2023	BNSF	UP
Non-shuttle	$38	$50
Shuttle	-$213	-$200

Average non-shuttle bids/offers fell $6 this week, and are $106 below the peak.
Average shuttle bids/offers fell $6 this week and are $81 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 September 2023



6/15/2023	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$175	-$125

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $25 this week and are $367 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: 6/15/2023	Delivery period					
		Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Non-shuttle	**BNSF-GF**	**38**	**38**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	13	-13	n/a	n/a	n/a	n/a
	Change from same week 2022	38	-13	n/a	n/a	n/a	n/a
	UP-Pool	**-25**	**50**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	13	0	n/a	n/a	n/a	n/a
	Change from same week 2022	-525	-650	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**-256**	**-213**	**-175**	**750**	**n/a**	**n/a**
	Change from last week	-6	-13	-25	0	n/a	n/a
	Change from same week 2022	-15	25	-75	-700	n/a	n/a
	UP-Pool	**-400**	**-200**	**-125**	**517**	**n/a**	**n/a**
	Change from last week	0	0	-25	-58	n/a	n/a
	Change from same week 2022	-500	-400	-625	-683	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	-50	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;

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]

June 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	$4,095	$202	$42.68	$1.16	3
	Grand Forks, ND	Duluth-Superior, MN	$3,858	$66	$38.96	$1.06	3
	Wichita, KS	Los Angeles, CA	$7,640	$337	$79.21	$2.16	-3
	Wichita, KS	New Orleans, LA	$4,825	$356	$51.45	$1.40	1
	Sioux Falls, SD	Galveston-Houston, TX	$7,376	$276	$75.99	$2.07	-2
	Colby, KS	Galveston-Houston, TX	$5,075	$390	$54.27	$1.48	0
	Amarillo, TX	Los Angeles, CA	$5,121	$543	$56.24	$1.53	-5
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$402	$43.72	$1.11	-5
	Toledo, OH	Raleigh, NC	$8,551	$456	$89.44	$2.27	2
	Des Moines, IA	Davenport, IA	$2,655	$85	$27.21	$0.69	4
	Indianapolis, IN	Atlanta, GA	$6,593	$342	$68.87	$1.75	3
	Indianapolis, IN	Knoxville, TN	$5,564	$222	$57.45	$1.46	4
	Des Moines, IA	Little Rock, AR	$4,250	$250	$44.69	$1.14	3
	Des Moines, IA	Los Angeles, CA	$6,130	$729	$68.12	$1.73	-2
Soybeans	Minneapolis, MN	New Orleans, LA	$4,242	$605	$48.14	$1.31	-10
	Toledo, OH	Huntsville, AL	$7,037	$325	$73.11	$1.99	2
	Indianapolis, IN	Raleigh, NC	$7,843	$462	$82.47	$2.24	2
	Indianapolis, IN	Huntsville, AL	$5,689	$219	$58.67	$1.60	4
	Champaign-Urbana, IL	New Orleans, LA	$4,865	$402	$52.31	$1.42	0
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,393	$194	$45.55	$1.24	0
	Wichita, KS	Galveston-Houston, TX	$4,611	$151	$47.29	$1.29	-3
	Chicago, IL	Albany, NY	$7,090	$430	$74.68	$2.03	3
	Grand Forks, ND	Portland, OR	$6,051	$334	$63.41	$1.73	-3
	Grand Forks, ND	Galveston-Houston, TX	$5,399	$348	$57.07	$1.55	-3
	Colby, KS	Portland, OR	$5,923	$640	$65.17	$1.77	-5
Corn	Minneapolis, MN	Portland, OR	$5,660	$407	$60.25	$1.53	-3
	Sioux Falls, SD	Tacoma, WA	$5,620	$373	$59.51	$1.51	-2
	Champaign-Urbana, IL	New Orleans, LA	$4,170	$402	$45.41	$1.15	1
	Lincoln, NE	Galveston-Houston, TX	$4,360	$217	$45.46	$1.15	1
	Des Moines, IA	Amarillo, TX	$4,670	$315	$49.50	$1.26	2
	Minneapolis, MN	Tacoma, WA	$5,660	$404	$60.22	$1.53	-3
	Council Bluffs, IA	Stockton, CA	$5,580	$418	$59.56	$1.51	-3
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,350	$373	$66.76	$1.82	-2
	Minneapolis, MN	Portland, OR	$6,400	$407	$67.60	$1.84	-2
	Fargo, ND	Tacoma, WA	$6,250	$332	$65.36	$1.78	-1
	Council Bluffs, IA	New Orleans, LA	$5,095	$464	$55.20	$1.50	-1
	Toledo, OH	Huntsville, AL	$5,277	$325	$55.63	$1.51	3
	Grand Island, NE	Portland, OR	$5,730	$655	$63.40	$1.73	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.

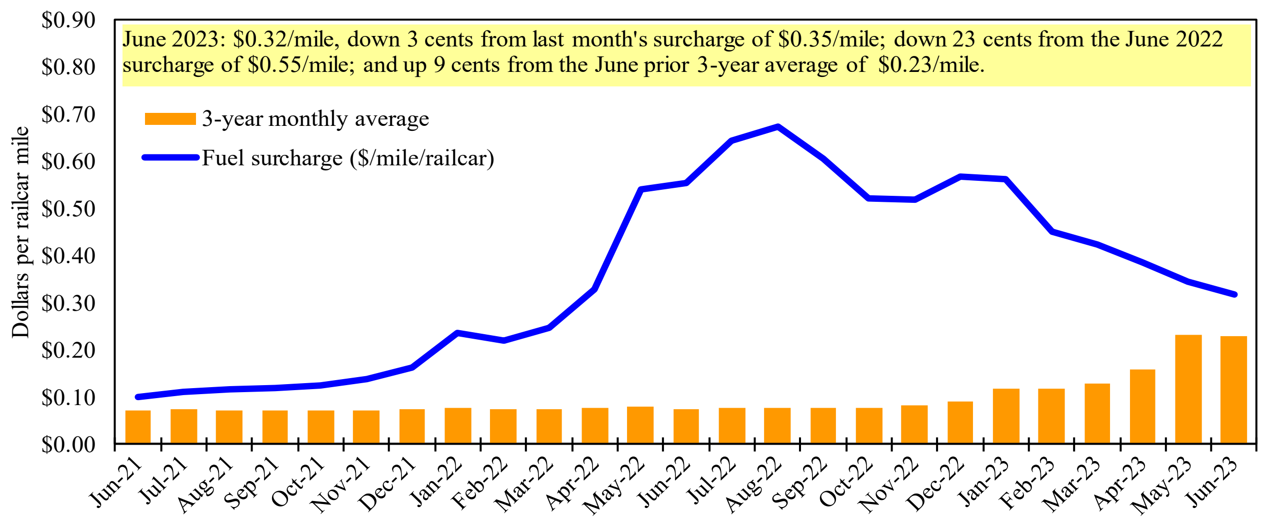
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[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]

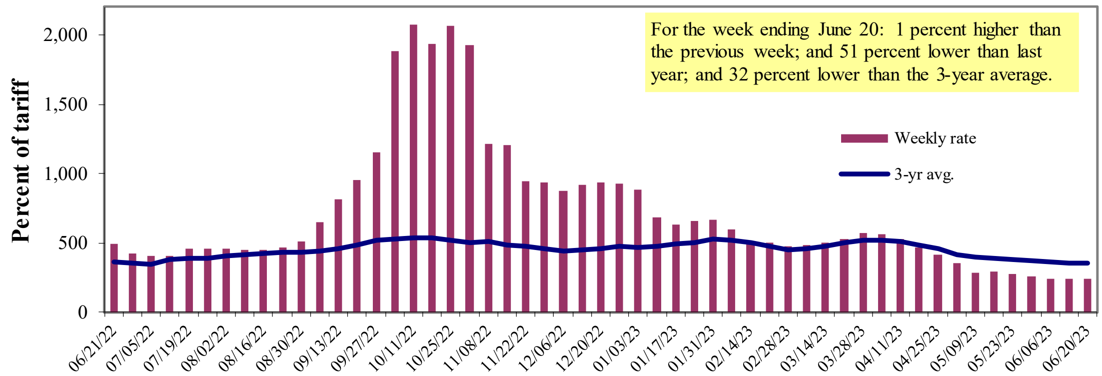


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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]	6/20/2023	320	268	239	219	224	224	211
	6/13/2023	347	268	236	207	224	224	208
$/ton	6/20/2023	19.81	14.26	11.09	8.74	10.51	9.05	6.63
	6/13/2023	21.48	14.26	10.95	8.26	10.51	9.05	6.53
Current week % change from the same week:								
	Last year	-46	-49	-51	-46	-55	-55	-45
	3-year avg. [2]	-29	-28	-32	-13	-23	-23	-12
Rate[1]	July	361	281	265	225	235	235	221
	September	554	521	518	505	518	518	518

[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

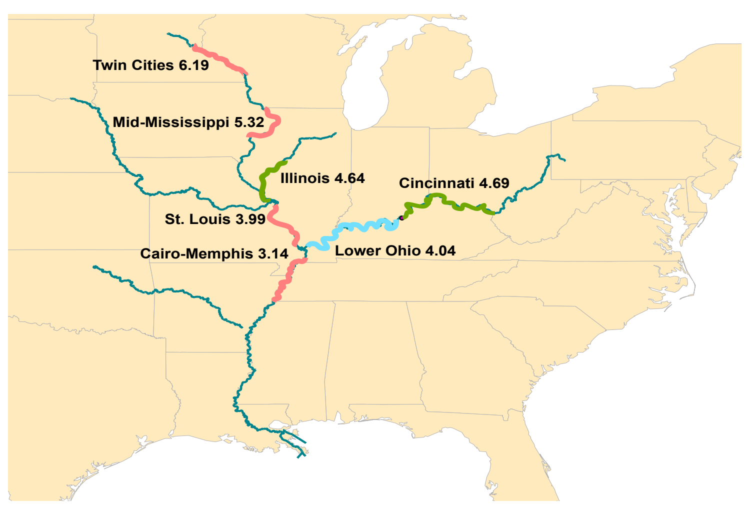
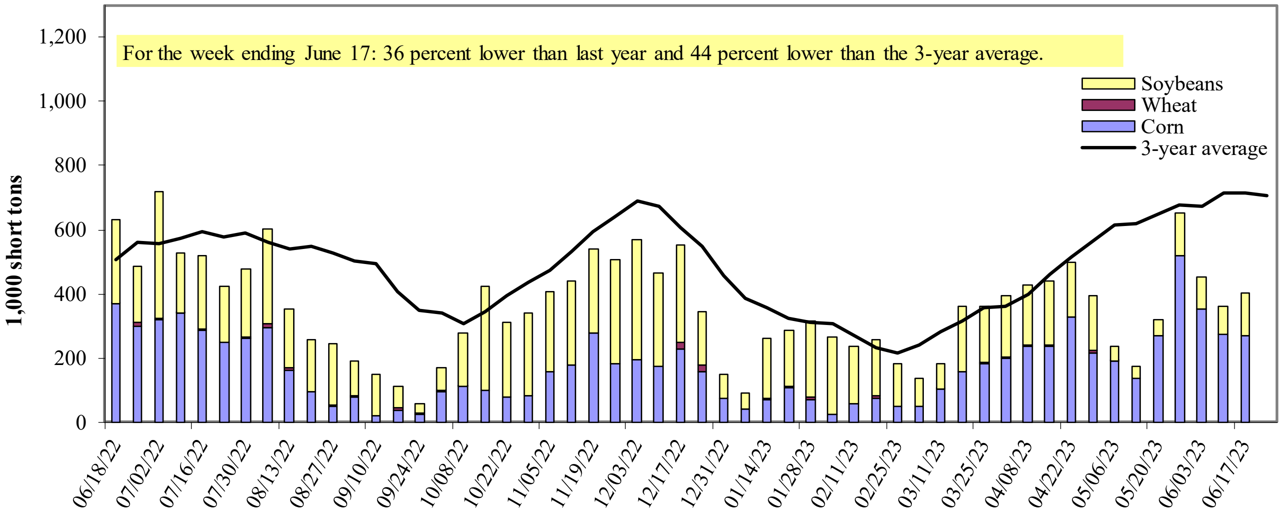


Figure 9

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 06/17/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	61	0	62	0	123
Winfield, MO (L25)	175	0	95	0	269
Alton, IL (L26)	253	0	112	0	365
Granite City, IL (L27)	272	0	130	0	402
Illinois River (La Grange)	35	0	43	0	78
Ohio River (Olmsted)	46	0	24	0	69
Arkansas River (L1)	0	16	1	0	18
Weekly total - 2023	317	16	155	0	489
Weekly total - 2022	455	29	286	0	769
2023 YTD[1]	7,196	559	5,499	152	13,405
2022 YTD[1]	9,947	775	5,782	132	16,636
2023 as % of 2022 YTD	72	72	95	115	81
Last 4 weeks as % of 2022[2]	83	29	55	0	71
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.

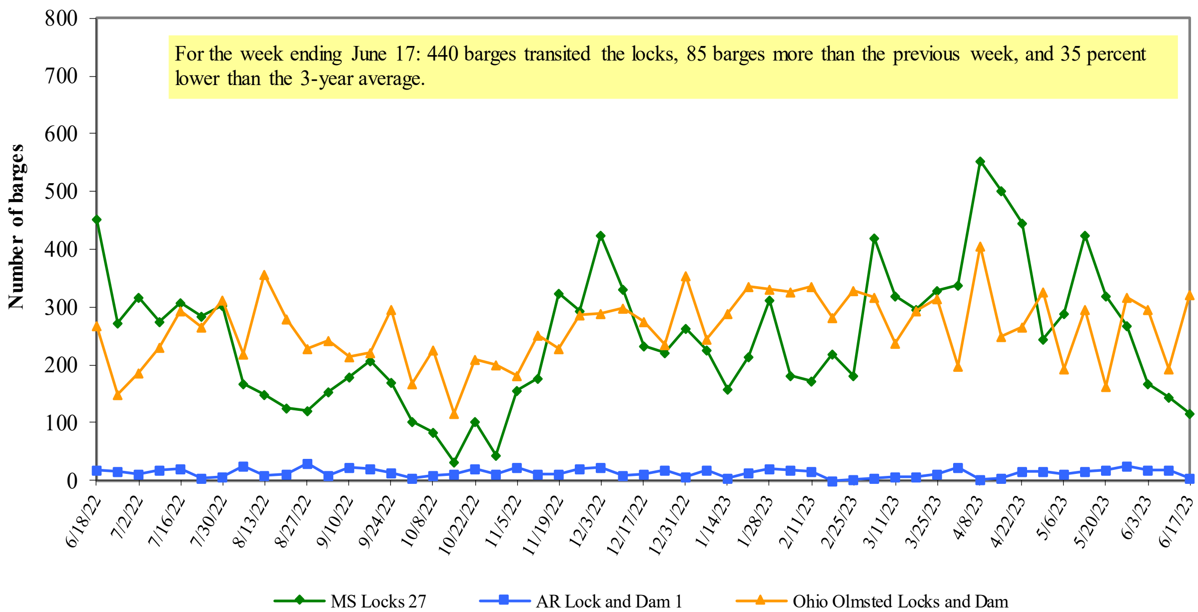
[2] As a percent of same period in 2022.

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

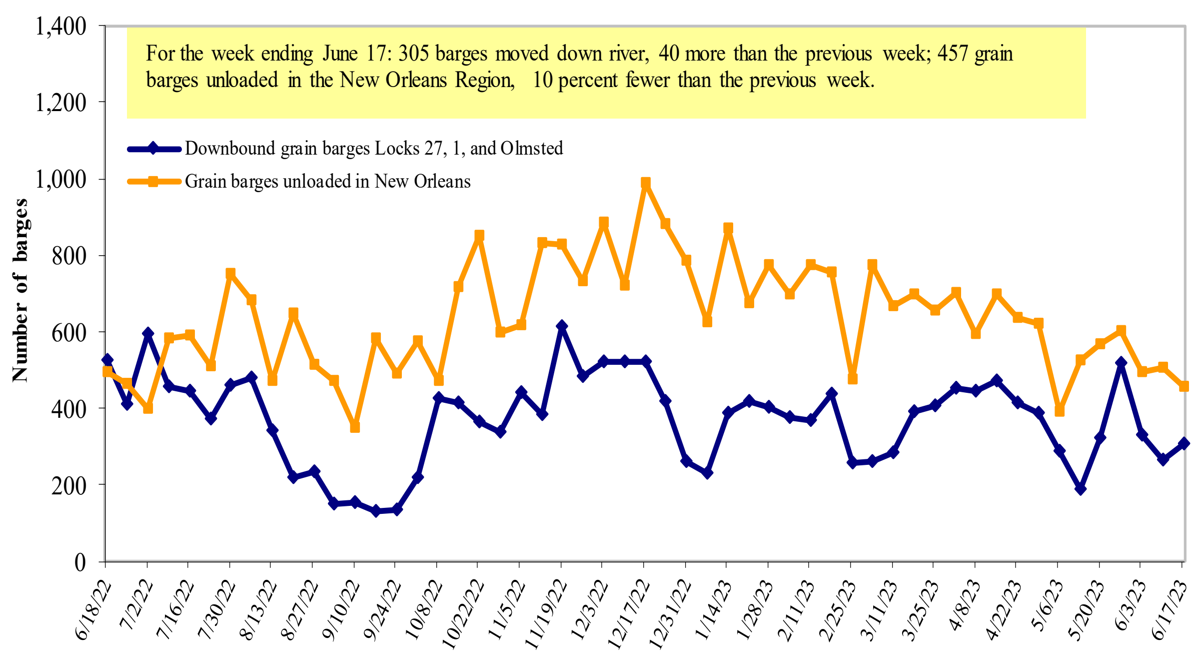


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

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 6/19/2023 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.866	0.006	-2.017
	New England	4.116	0.000	-2.007
	Central Atlantic	4.126	-0.011	-2.003
	Lower Atlantic	3.745	0.013	-2.017
II	Midwest	3.739	0.022	-2.041
III	Gulf Coast	3.532	0.043	-1.921
IV	Rocky Mountain	4.032	0.019	-1.750
V	West Coast	4.432	0.008	-2.084
	West Coast less California	4.137	-0.005	-2.014
	California	4.773	0.023	-2.142
Total	United States	3.815	0.021	-1.995

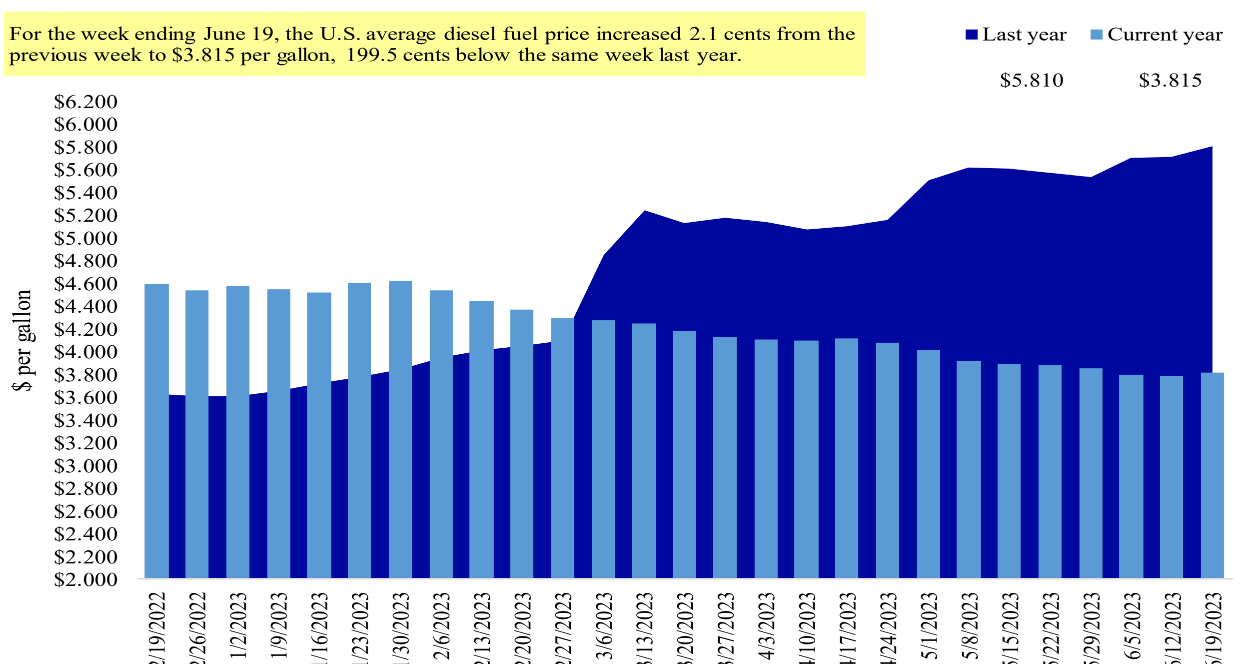
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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)

For the week ending	Wheat HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
Export balances[1]									
6/8/2023	680	1,131	1,055	552	94	3,511	5,634	3,130	12,275
This week year ago	1,125	898	1,286	840	64	4,214	10,594	9,492	24,300
Cumulative exports-marketing year[2]									
2022/23 YTD	120	29	146	146	0	440	32,978	48,519	81,937
2021/22 YTD	218	87	169	108	0	582	49,069	50,649	100,300
YTD 2022/23 as % of 2021/22	55	33	86	135	0	76	67	96	82
Last 4 wks. as % of same period 2021/22	44	74	60	49	102	57	68	31	51
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 6/08/2023	Total commitments[2] 2023/24 next MY	2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -			-1,000 mt -
Mexico	1,977	14,526	16,026	(9)	15,227
China	272	7,511	14,735	(49)	12,616
Japan	523	6,201	9,350	(34)	10,273
Columbia	0	2,177	4,289	(49)	4,398
Korea	0	819	1,402	(42)	2,563
Top 5 importers	**2,772**	**31,234**	**45,802**	(32)	**45,077**
Total U.S. corn export sales	**2,979**	**38,612**	**59,663**	(35)	**56,665**
% of YTD current month's export projection	6%	88%	95%		
Change from prior week[2]	**21**	**273**	**141**		
Top 5 importers' share of U.S. corn export sales	93%	81%	77%		80%
USDA forecast June 2023	**53,435**	**43,893**	**62,875**	(30)	
Corn use for ethanol USDA forecast, June 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 6/08/2023	Total commitments[2] 2023/24 next MY	2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -			-1,000 mt -
China	1,447	31,116	30,527	2	27,283
Mexico	228	4,491	5,325	(16)	4,929
Egypt	0	1,142	4,088	(72)	3,553
Japan	115	2,273	2,361	(4)	2,266
Indonesia	1	1,480	1,652	(10)	2,116
Top 5 importers	**1,790**	**40,502**	**43,954**	(8)	**40,147**
Total U.S. soybean export sales	**3,166**	**51,649**	**60,141**	(14)	**54,231**
% of projected exports	6%	95%	102%		
change from prior week[2]	**49**	**478**	**249**		
Top 5 importers' share of U.S. soybean export sales	57%	78%	73%		**74%**
USDA forecast, June 2023	**53,815**	**54,496**	**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 6/08/2023	Total commitments[2] 2023/24 current MY	2022/23 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2020-22
	1,000 mt -			-1,000 mt -
Mexico	647	861	(25)	3,397
Philippines	593	804	(26)	2,615
Japan	398	389	2	2,281
China	7	0	0	1,740
Korea	305	290	5	1,426
Nigeria	50	321	(84)	1,276
Taiwan	221	127	74	944
Thailand	49	122	(60)	643
Colombia	68	230	(70)	537
Indonesia	10	11	(6)	469
Top 10 importers	**2,348**	**3,155**	(26)	**15,327**
Total U.S. wheat export sales	**3,951**	**4,796**	(18)	**20,411**
% of projected exports	20%	23%		
change from prior week[2]	**165**	**237**		
Top 10 importers' share of U.S. wheat export sales	59%	66%		75%
USDA forecast, June 2023	**19,755**	**21,117**	(6)	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2022/23; 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)

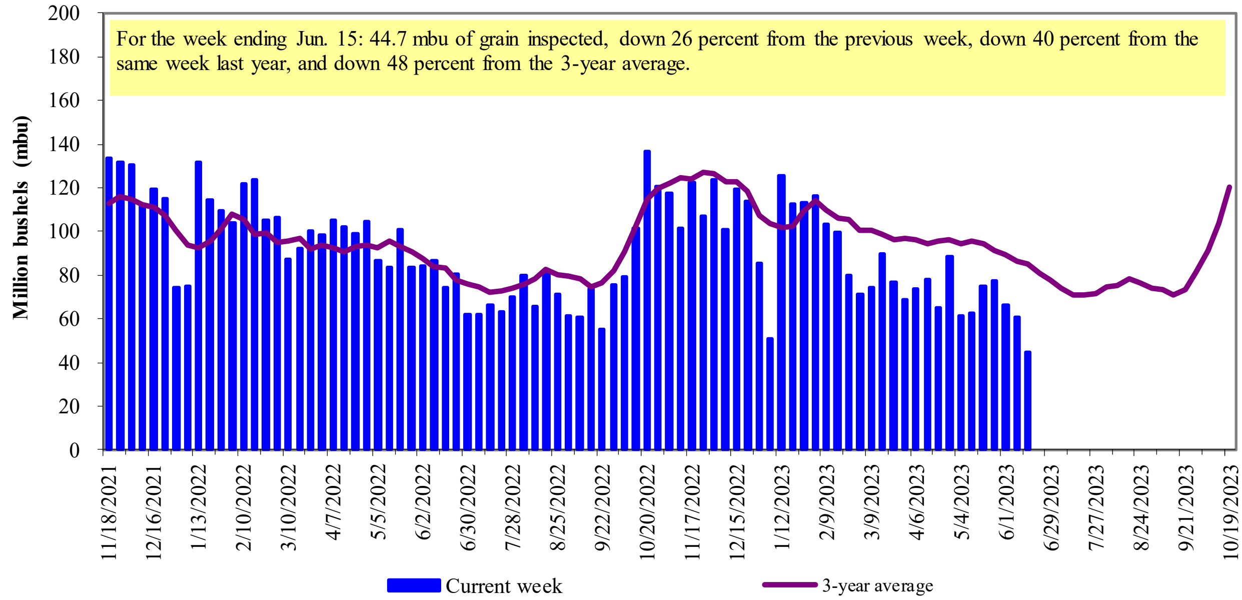
Port regions	For the week ending 06/15/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2022 total*
Pacific Northwest									
Wheat	82	194	42	4,833	4,346	111	98	62	9,836
Corn	67	327	20	3,851	7,206	53	80	71	9,615
Soybeans	0	0	n/a	3,521	4,422	80	0	0	14,178
Total	**149**	**521**	**29**	**12,206**	**15,974**	**76**	**83**	**67**	**33,629**
Mississippi Gulf									
Wheat	89	15	605	1,348	1,927	70	68	76	4,053
Corn	459	619	74	13,274	20,131	66	87	80	30,781
Soybeans	116	72	160	12,831	11,258	114	51	62	31,283
Total	**664**	**706**	**94**	**27,452**	**33,316**	**82**	**77**	**76**	**66,116**
Texas Gulf									
Wheat	0	1	n/a	1,203	1,594	75	44	35	3,421
Corn	2	0	n/a	112	378	30	32	48	648
Soybeans	0	0	n/a	52	2	n/a	n/a	n/a	685
Total	**2**	**1**	**n/a**	**1,366**	**1,974**	**69**	**42**	**36**	**4,754**
Interior									
Wheat	38	27	137	1,175	1,314	89	76	79	2,912
Corn	228	203	112	4,431	4,399	101	99	104	8,961
Soybeans	54	67	81	2,964	3,467	85	56	69	7,109
Total	**320**	**298**	**107**	**8,570**	**9,180**	**93**	**81**	**89**	**18,982**
Great Lakes									
Wheat	14	11	125	148	111	133	104	42	395
Corn	0	0	n/a	23	100	23	0	0	158
Soybeans	0	0	n/a	31	195	16	0	0	760
Total	**14**	**11**	**125**	**202**	**407**	**50**	**31**	**26**	**1,312**
Atlantic									
Wheat	0	13	0	58	37	156	n/a	460	169
Corn	7	0	n/a	75	156	48	26	77	309
Soybeans	7	16	40	1,190	1,440	83	17	39	2,867
Total	**14**	**29**	**48**	**1,323**	**1,633**	**81**	**23**	**56**	**3,345**
U.S. total from ports*									
Wheat	223	261	85	8,765	9,330	94	78	60	20,786
Corn	763	1,150	66	21,765	32,369	67	85	80	50,471
Soybeans	176	155	114	20,589	20,785	99	45	60	56,882
Total	**1,162**	**1,566**	**74**	**51,119**	**62,483**	**82**	**75**	**73**	**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)

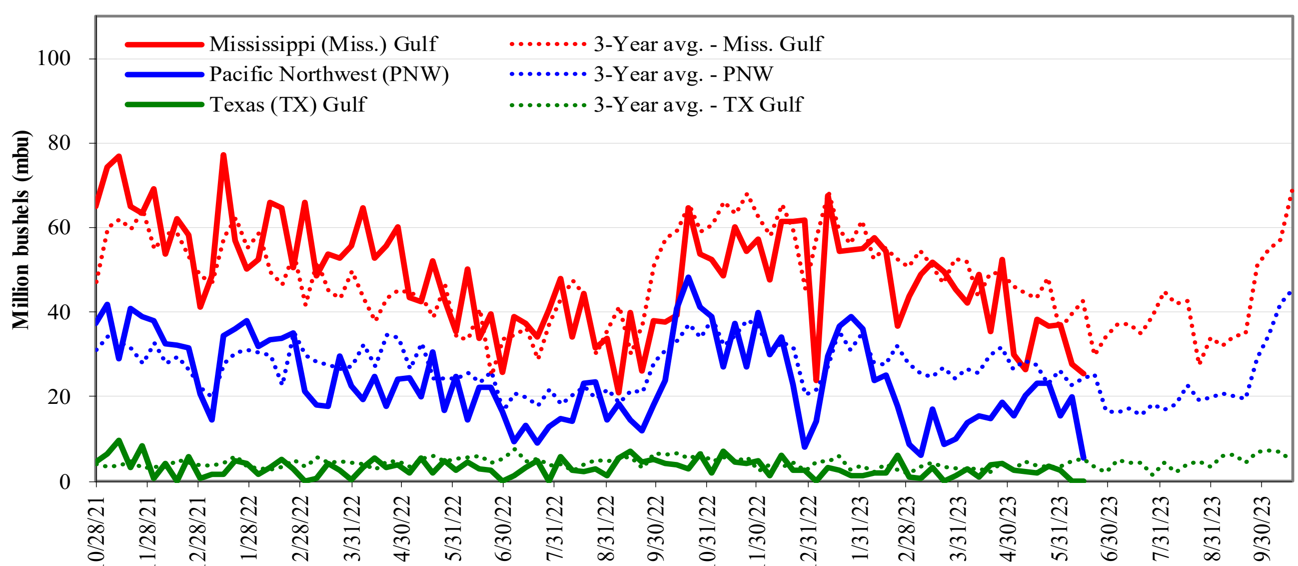


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 06/15/23 inspections (mbu):		Percent change	MS Gulf	TX	U.S. Gulf	PNW
MS Gulf:	25.6	Last wk:	down 7	up 100	down 7	down 72
PNW:	5.6	Last Year (same wk):	down 24	down 98	down 30	down 75
TX Gulf:	0.1	3-yr avg. (4-wk. mov. Avg):	down 38	down 98	down 44	down 77

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

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

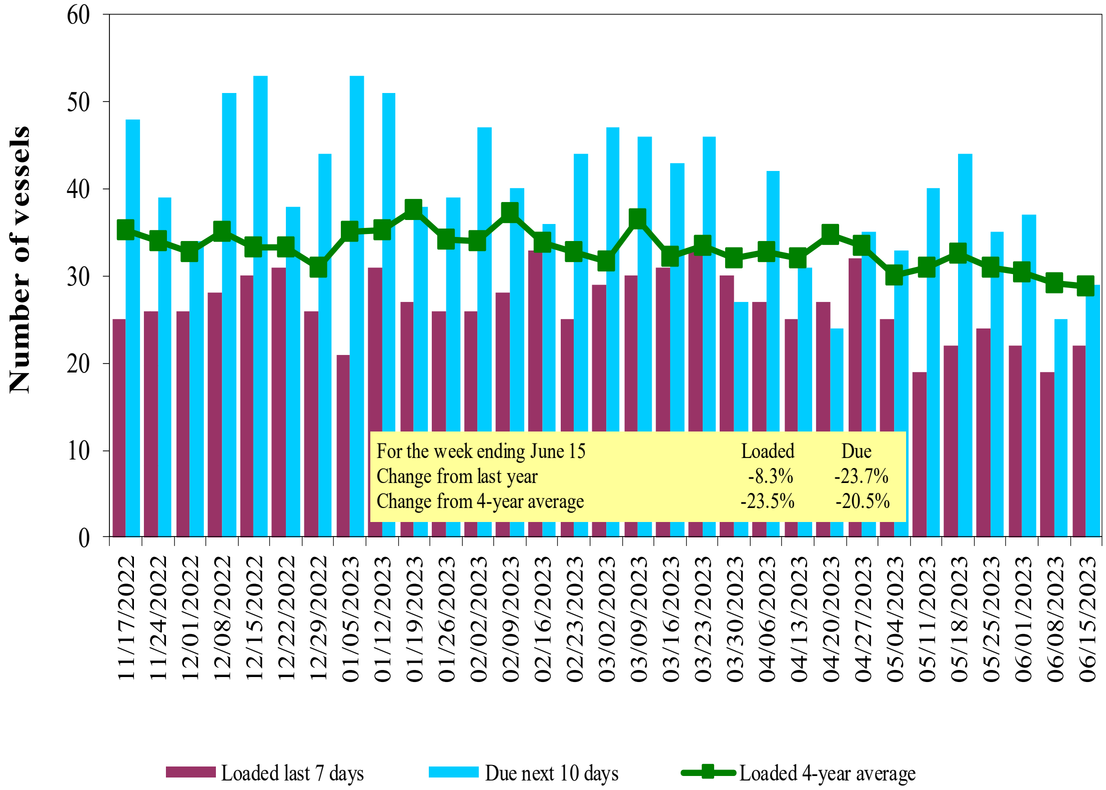
Date	Gulf In port	Gulf Loaded 7-days	Gulf Due next 10-days	Pacific Northwest In port
6/15/2023	15	22	29	6
6/8/2023	25	19	25	5
2022 range	(14…61)	(18…39)	(28...62)	(5…23)
2022 average	30	28	44	13

Note: The data is voluntarily collected and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 15

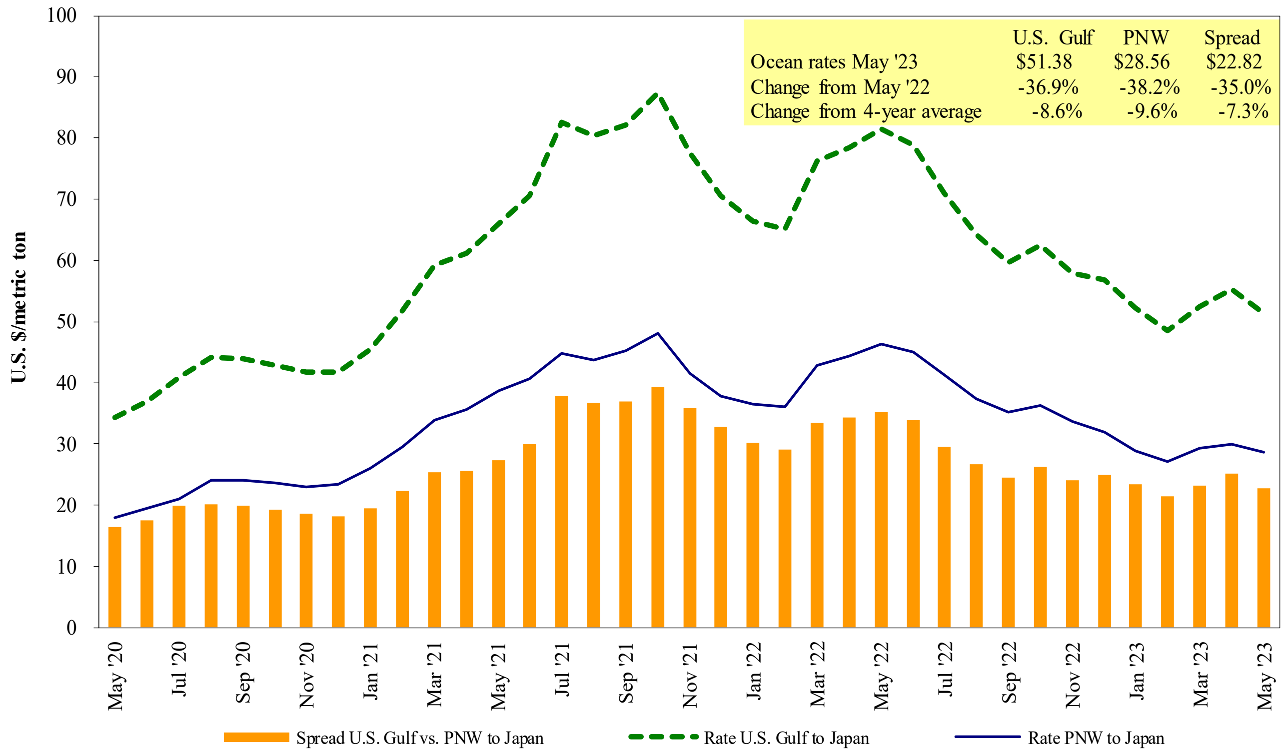
U.S. Gulf[1] vessel loading activity



[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 06/17/2023

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	Jamaica	Wheat	Jun 20/30, 2023	4,400	63.00 op 66.00
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.

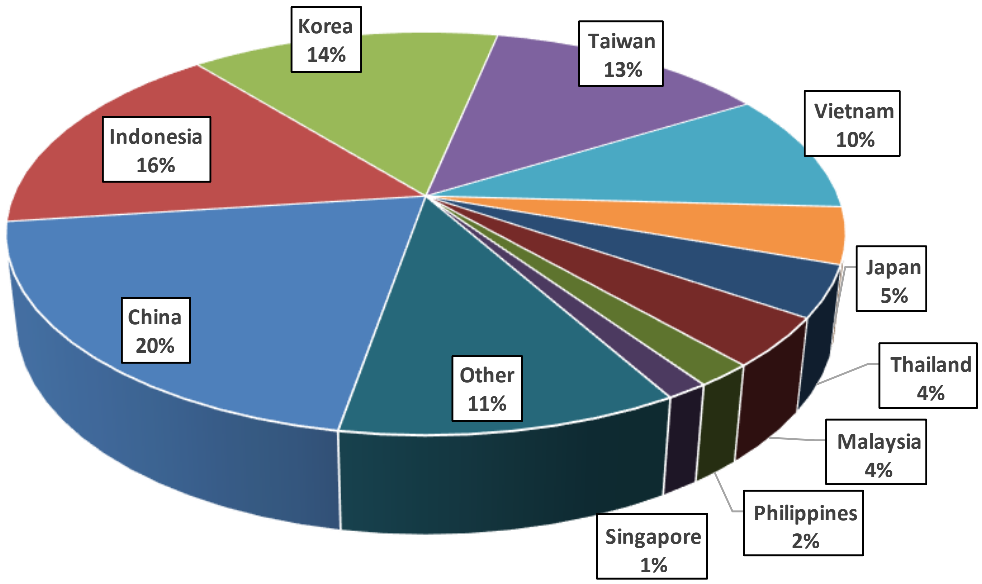
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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-Apr 2023

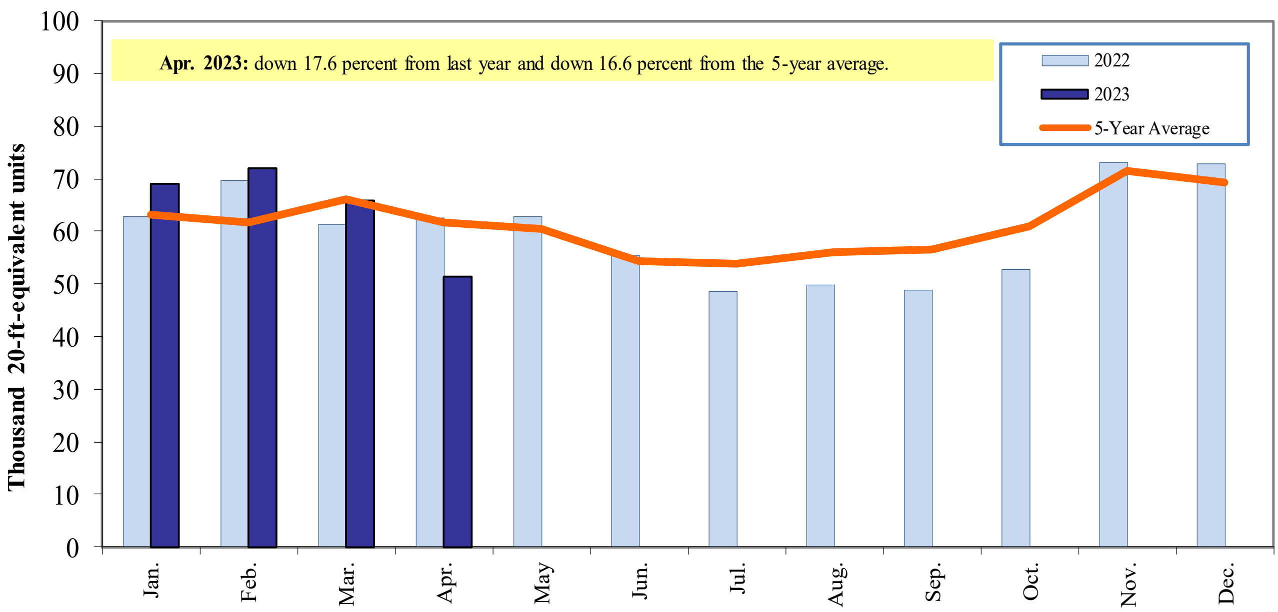


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '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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