United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contact Us

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Contents

The next release is July 27, 2023

WEEKLY HIGHLIGHTS

Russia Pulls Out of Black Sea Grain Deal

On Monday, July 17, Russia refused to extend the agreement that has allowed Ukraine to export grain from its Black Sea ports for the past year (Reuters). Brokered by Turkey and the United Nations, the Black Sea Grain Initiative has allowed Ukraine to export 33 million metric tons (mmt) of corn, wheat, and other grains despite Russia's wartime blockade. In marketing year 2022/23, Ukraine was the fifth-largest exporter of wheat worldwide, exporting over 13.5 mmt. On July 18, the U.S. Agency for International Development announced an additional $250 million in support of Ukraine's agricultural sector—including grain elevators, trans-shipment facilities, and port and border infrastructure.

NCGA Cites Transportation as Key to Export Competitiveness

According to USDA's July *World Agriculture Supply and Demand Estimates*, Brazil will likely export more corn than the United States, both in the current marketing year (MY) and upcoming MY 2023/24. However, a new white paper from the National Corn Growers Association (NCGA) suggests this trend may not necessarily continue. The white paper identifies U.S. superior infrastructure as being one reason for optimism about future U.S. corn exports. Currently, 60 percent of grain is transported by truck in Brazil, which is slightly lower than the analogous U.S. share. However, Brazil has only 25 percent of the roadway miles found in the United States (despite Brazil's being 87 percent the size of the United States). Additionally, only 12 percent of Brazil's roads are paved, compared to nearly 70 percent of U.S. roads. Another challenge for Brazil is that its storage capacity has not kept pace with rising grain production—leading to an estimated 4-billion-bushel shortfall of capacity this year. For more on Brazil's agricultural transportation, see USDA's *Brazil Soybean Transportation* report.

Recent Chassis Maintenance Causes Short-Term Shortage in Chicago

According to the *Journal of Commerce*, Chicago-region trucking firms recently reported a scarcity of chassis to move international shipping containers. Chassis providers have assured truckers and shippers the situation is temporary. In recent weeks, both Direct ChassisLink, Inc., and TRAC Intermodal—two of the largest U.S. intermodal equipment providers—have undergone significant upgrades, maintenance, and repair of their equipment. Progress in returning the chassis to service has been slowed by the challenge of finding sufficient mechanics to do the work. Containerized agricultural exports sourced in our Nation's heartland—such as grain, soybeans, and meat products—rely on chassis for movement to port regions.

CVA Announces Plans for a New Grain Shuttle Facility in Kansas

On July 6, Central Valley Ag (CVA)—a farmer-owned cooperative in Iowa, Kansas, and Nebraska—announced plans to build a new grain shuttle facility in Republic County, KS. Located on an existing grain elevator site, the new 5.5-million-bushel (mbu) grain facility will allow for a "high-speed shuttle loader" with access to a BNSF railway line. In addition to the grain shuttle facility, the site will include a 3.5-million-gallon liquid fertilizer plant that will be able to receive fertilizer by rail or truck. Construction of the grain shuttle facility is expected to start this fall and finish by summer 2025. In 2022, farmers in Republic County produced 5.1 mbu of soybeans—the fourth-highest production among Kansas counties.

Snapshots by Sector

Export Sales

For the week ending July 6, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 10.53 million metric tons (mmt), down 3 percent from last week and down 45 percent from the same time last year. Net **corn export sales** for MY 2022/23 were 0.469, up 86 percent from last week. Net **soybean export sales** were 0.081 mmt, up 57 percent from last week. Net weekly **wheat export sales** for MY 2023/24, were 0.396 mmt, down 2 percent from last week.

Rail

U.S. Class I railroads originated 12,629 **grain carloads** during the week ending July 8. This was a 20-percent decrease from the previous week, 23 percent fewer than last year, and 25 percent fewer than the 3-year average.

Average July **shuttle secondary railcar bids/offers** (per car) were $59 below tariff for the week ending July 13. This was $191 more than last week and $26 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $75 above tariff. This was $75 more than last week and $13 more than this week last year.

Barge

For the week ending July 15, **barged grain movements** totaled 414,354 tons. This was 19 percent less than the previous week and 42 percent less than the same period last year.

For the week ending July 15, 267 grain barges **moved down river**—73 fewer than last week. There were 343 grain barges **unloaded** in the New Orleans region, 9 percent fewer than last week.

Ocean

For the week ending July 13, 18 **oceangoing grain vessels** were loaded in the Gulf—28 percent fewer than the same period last year. Within the next 10 days (starting July 14), 37 vessels were expected to be loaded—5 percent fewer than the same period last year.

As of July 13, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.75. This was 1 percent less than the previous week. The rate from the Pacific Northwest to Japan was $25.75 per mt, 1 percent less than the previous week.

Fuel

For the week ending July 17, the U.S. average **diesel fuel price** was unchanged from the previous week at $3.806 per gallon, 162.6 cents below the same week last year.

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Feature Article/Calendar

Grain Transportation Update: Low Demand Likely To Persist Through Summer

Demand for grain transportation has been well below average this summer, reflecting low export demand for marketing year (MY) 2022/23 and low domestic grain stocks (*Grain Transportation Report*, July 13, 2023, first highlight). Grain carloads on the Nation's Class I railroads reached a 15-year low in the most recent week of data, and barge volumes are well below the 5-year average as well. Low volumes have lessened the impacts of recent challenges to barge supplies, including adverse weather conditions and low water levels affecting the Mississippi River System (MRS).

Over the last 15 weeks, grain transport cost indicators (***GTR* table 1**) have declined 9 percent for trucking, 7 percent for shuttle trains, 2 percent for non-shuttle trains, 55 percent for barge, 9 percent for ocean vessels departing the U.S. Gulf Coast, and 10 percent for ocean vessels departing the Pacific Northwest (PNW). However, the demand for grain transportation could pick up in the near term. According to USDA's July *World Agricultural Supply and Demand Estimates (WASDE)*, total U.S. disappearance of the three major grains is expected to rise in MY 2023/24.

Record Low Grain Carloads Coincide With Service Improvement

Apart from a slight uptick in April, grain carloads have generally declined since late January (***GTR* fig. 2**). For the week ending July 8, total grain carloads across the four U.S. Class I railroads (BNSF Railway, Union Pacific Railroad, CSX Transportation, and Norfolk Southern Railway) were 12,629—the fewest weekly carloads since the last week of December 2008. At the State level, grain cars loaded and billed in June were up 20 percent from the prior 5-year average in Illinois and Ohio. However, the same indicator was down significantly in Iowa (48 percent), Indiana (19 percent), Kansas (58 percent), Minnesota (29 percent), Montana (41 percent), North Dakota (35 percent), Nebraska (59 percent), and South Dakota (40 percent). Apart from grain, total rail traffic, especially intermodal, is down so far in 2023.

The low demand for grain car service is reflected in the secondary market for shuttle trains. Bids for shuttles in the nearest month have been negative since January. In the latest week of data, near-month (July or August) shuttle car bids averaged −$151. Unable to sell excess shuttle capacity on the secondary market, many shuttle contracts have been cancelled in the last several months.

Likely, as a result of the low carloads, nearly all the Surface Transportation Board's service metrics have improved. Average origin dwell time—i.e., from when a shuttle train is released at its origin or interchange until the receiving carrier moves the train—fell from over 30 hours at the start of April to 17 hours by July. One sign of improved network fluidity is a reduced number of grain cars not moved in over 48 hours. At the end of March, this metric averaged around 300 cars per week across Class I railroads. By the start of July, that number was down to 130 per week. Grain shippers are also having an easier time receiving manifest service: at the start of this year, unfilled grain car orders were nearly 19,000, and in the latest week of data, were down to 423.

Declines in Barge Demand, Barged Grain Movements, and Spot Rates

In second quarter 2023, barged grain movements and freight rates were challenged by extreme weather and slow export sales (see, also, *Grain Transportation Report*, July 13). In late April, portions of the MRS flooded, and all the locks and dams above St. Louis, MO, were closed to traffic until mid-May. Later in the quarter, diminished grain sales lowered demand for barges. Throughout the first and second quarters of 2023, export sales lagged last year and the previous 5-year-average, reducing the demand for barges. Although typically low in the second quarter as farmers focus on planting, second-quarter spot freight rates were much lower this year: with the closure of the upper MRS, rates fell sharply because of an excess supply of barges and a lack of demand for barges to move grain.

From April 4 to July 18, the St. Louis spot rate (the cost to request nearby services) dropped from 404 percent of the benchmark tariff ($15.20 per ton) to 314 percent of benchmark tariff ($12.53 per ton). Over the same April-July period, the spot rate on the Mid-Mississippi dropped from 566 percent of the benchmark tariff ($30.11 per ton) to 384 percent of the benchmark tariff ($20.43 per ton). The spot rate for the first week of July was 25 percent lower than last year.

Barged grain movements in second quarter 2023 were down both from second quarter 2022 and the previous 5-year-average. For the week ending July 15, YTD 2023 total downbound barged grain tonnage was 15.1 million tons—23 percent lower than the same week last year and 19 percent lower than the previous 5-year average. After the floods early in the quarter, low water levels toward the end of the quarter have caused 10-15-percent reductions in draft sizes and 14-25 percent reductions in tow size. These changes have lengthened barge transits by 1 to 2 days.

Dry-Bulk Ocean Freight Rates Below the Yearly Peak

After tapering off from their yearly peak on April 13, ocean freight rates for shipping grain have mostly stabilized for the past 2 weeks. As of July 17, the ocean freight rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.75—34 percent less than the same 2022 period and 23 percent less than the 4-year average. The rate from PNW to Japan was $25 per mt—37 percent less than the same 2022 period and 33 percent less than the 4-year average. Also, as of July 17, the rate from the U.S. Gulf to Europe was $25 per mt—29 percent less than the same 2022 period and 3 percent more than the 4-year average. Down sharply from a year ago, ocean freight rates are responding to low bulk market activity. The bulk market is sluggish because of weak Chinese cargo demand and June holidays in some Asian countries such as Singapore (*Transportation and Export Report*, O'Neil Commodity Consulting, June 29 and July 6, 2023). Further slowing the recovery of the bulk shipping market and pushing down ocean freight

rates, uncertainty surrounds the July 17 announcement that Russia has pulled out of the Black Sea Grain Initiative. (For the last year, the initiative has exempted Ukrainian grain exports from Russia's wartime blockade of the Black Sea.) YTD, as of July 13, an average of 25 oceangoing grain vessels per week were loaded in the U.S. Gulf, same as the number of vessels loaded during the same period in 2022.

Diesel Prices Projected To Rise in Fourth Quarter

For the week ending July 17, the U.S. average diesel price was $3.806 per gallon, unchanged from last week and down 1.63 per gallon from same time last year. Weekly average U.S. diesel prices have continued to fall for most of 2023, rising only six times this year: three increases were in January, and the other three were during the weeks ending April 17, June 19, and July 10. For the week ending July 10, U.S average diesel prices rose 3.9 cents per gallon—the second-largest increase of 2023 (8 cents behind the January 23 increase). The July increase was due to rising crude oil prices following the announcement that the Organization of the Petroleum Exporting Countries and its allies (OPEC+) would reduce oil production to around 5 million barrels per day (about 5 percent of global oil demand). This resulted in the West Intermediate Texas crude oil price increasing from under $68 per barrel on June 27 to over $74 per barrel on July 10. Looking ahead, as global inventories decline, the Energy Information Administration's (EIA) July 11 *Short Term Energy Outlook* projects spot Brent crude oil prices will gradually increase to $80 per barrel in fourth quarter 2023 and will average $84 per barrel in 2024. From third to fourth quarter 2023, EIA also projects the average per gallon diesel price will rise 23 cents per gallon to $3.88 per gallon. U.S. diesel prices are projected to average $3.96 per gallon in 2023 and $3.84 gallon in 2024, up 1 cent and 2 cents, respectively, from EIA's June forecast, but down from the 2022 average price of $5.02 per gallon.

Grain Exports Increase in MY 2023/24

According to USDA's July *WASDE*, total U.S. disappearance (domestic use, plus exports) of the three major grains is expected to total 20.6 billion bushels in MY 2023/24, up 3 percent from MY 2022/23. If it materializes, the rising disappearance will lift transportation demand. From MY 2022/23 to MY 2023/24, exports for these grains are projected to rise 7 percent, because of higher corn exports. Likewise, domestic use is expected to increase 3 percent, because of higher corn and soybean consumption (table 1).

Since *WASDE*'s June forecast, corn exports for MY 2022/23 were revised down by 1.9 million metric tons (mmt), because of slow outstanding export sales and competition from Brazil's record second corn crop (Safrina), which enters the market in July. After subtracting, from *WASDE*'s MY 2022/23 projection, the corn that has already shipped—the outstanding balance of corn to be shipped through August 31 is 6.5 mmt. This total is 31 percent below the same time last year. From MY 2022/23 to MY 2023/24, because of rising supply, U.S. corn exports are projected to increase 27 percent to 53.4 mmt.

The robust domestic demand for soybean crush and strong competition from Brazil that pervaded MY 2022/23 are expected to continue in MY 2023/24. Tight U.S. soybean supplies (due to strong domestic demand) in MY 2023/24 are expected to raise U.S. prices, which would decrease U.S. competitiveness in the global market, particularly with Brazil. As a result, U.S. exports are projected to be 8 percent lower than MY 2022/23 and 6 percent lower (0.544 mmt) than *WASDE*'s June projections. After subtracting, from *WASDE*'s MY 2022/23 projection, the soybeans that have already shipped—the outstanding balance of soybeans to be shipped through August 31 is 4.2 mmt. This total is 31 percent below the same time last year.

Table 1. Major grains: production and use, July 2023

million bushels

	Corn	Soybeans	Wheat	Total	Y/Y
United States *2023/24* ***(projected)***					
Production	15,320	4,300	1,739	21,359	**8.7%**
Exports	**2,100**	**1,850**	**725**	**4,675**	**6.5%**
Domestic use	12,385	2,426	1,132	15,943	**2.5%**
Ending stocks	**2,262**	**300**	**592**		
Total use	14,485	4,276	1,857		
Stocks/use	**15.6%**	**7.0%**	**31.9%**		
United States *2022/23* ***(projected)***					
Production	13,730	4,276	1,650	19,656	**-7.2%**
Exports	**1,650**	**1,980**	**759**	**4,389**	**-19.0%**
Domestic use	12,080	2,340	1,131	15,551	**-2.1%**
Ending stocks	**1,402**	**255**	**580**		
Total use	13,730	4,320	1,890		
Stocks/use	**10.2%**	**5.9%**	**30.7%**		
United States *2021/22* ***(estimated)***					
Production	15,074	4,465	1,646	21,185	
Exports	**2,472**	**2,152**	**796**	**5,420**	
Domestic use	12,483	2,312	1,093	15,888	
Ending stocks	**1,377**	**274**	**698**		
Total use	14,956	4,464	1,889		
Stocks/use	**9.2%**	**6.1%**	**37.0%**		

Source: USDA, *World Agricultural Supply and Demand Estimates*, July 2023.

For wheat, MY 2023/24 began on June 1. As of July 6, unshipped exports are 33 percent below the same time in MY 2022/23. For MY 2023/24, U.S. wheat exports are projected to fall 4 percent because of uncompetitive prices and lower supplies than other major exporters. Russia's strong wheat crop and the country's lower export taxes are expected to enhance Russia's competitiveness.
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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
07/19/23	255	325	246	204	209	183
07/12/23	255	321	238	172	207	181

[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	7/14/2023	7/7/2023
Corn	IL–Gulf	-1.08	-0.85
Corn	NE–Gulf	-1.14	-0.87
Soybean	IA–Gulf	-1.28	-1.25
HRW	KS–Gulf	-1.41	-1.58
HRS	ND–Portland	-1.40	-1.56

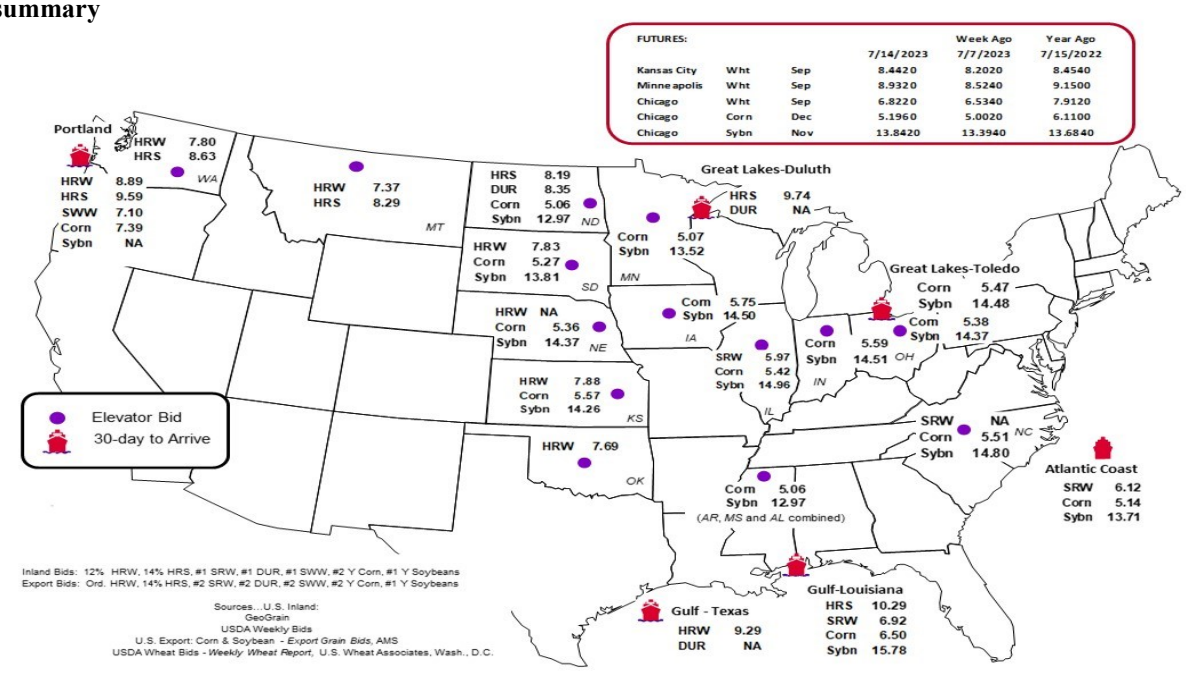
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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)

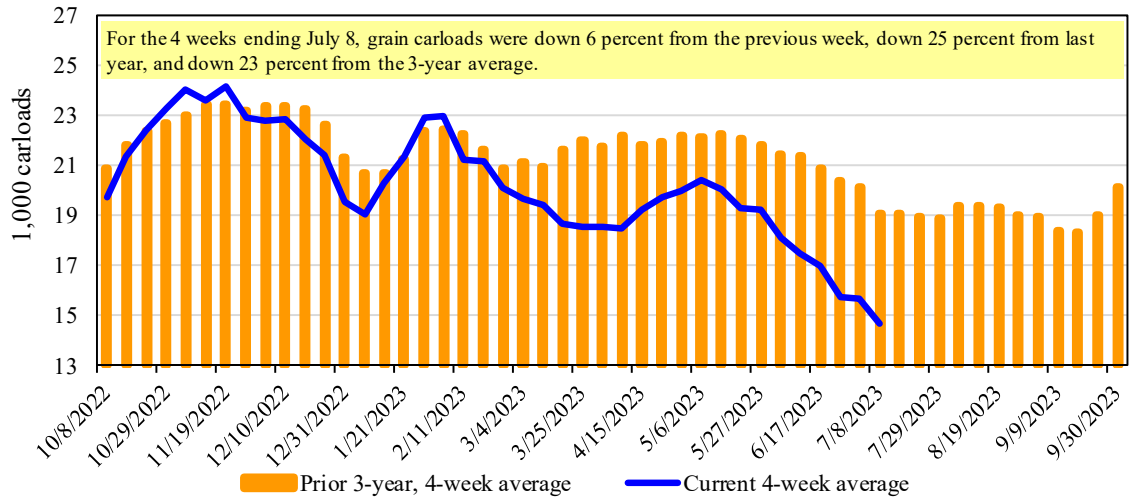
For the week ending: 7/08/2023	East		West		U.S. total	Central U.S./Canada	
	CSXT	NS	BNSF	UP		CPKC	CN
This week	1,151	2,630	4,869	3,979	12,629	4,496	3,745
This week last year	1,743	2,723	7,321	4,527	16,314	6,956	3,811
2023 YTD	51,036	73,443	243,776	145,348	513,603	261,066	122,449
2022 YTD	49,196	65,762	305,068	155,352	575,378	244,006	93,315
2023 YTD as % of 2022 YTD	104	112	80	94	89	107	131
Last 4 weeks as % of 2022	95	101	64	74	75	118	96
Last 4 weeks as % of 3-yr. avg.	100	109	65	78	77	100	91
Total 2022	93,428	130,558	570,232	296,945	1,091,163	538,276	214,050

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: 7/13/2023		Delivery period							
		Jul-23	Jul-22	Aug-23	Aug-22	Sep-23	Sep-22	Oct-23	Oct-22
BNSF	COT grain units	no offer	no offer	0	0	no offer	0	no offer	0
	COT grain single-car	no offer	no offer	219	14	104	287	126	80
UP	GCAS/vouchers	no offer	n/a	10	n/a	10	n/a	n/a	n/a

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

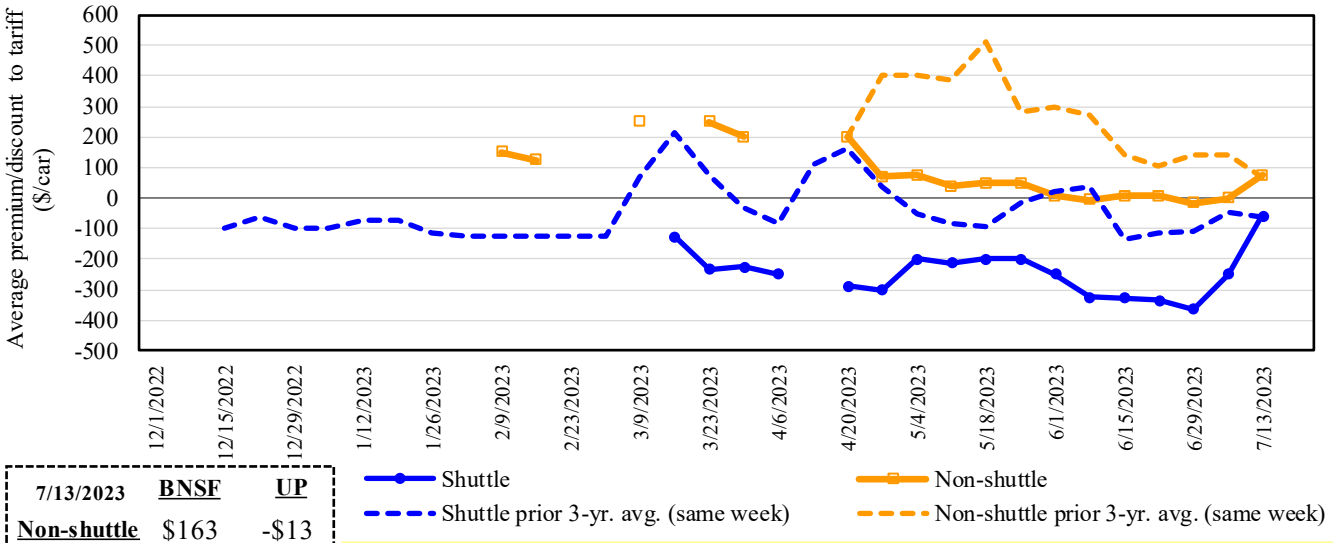
[2]Average premium/discount to tariff, last auction. n/a = not available.

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

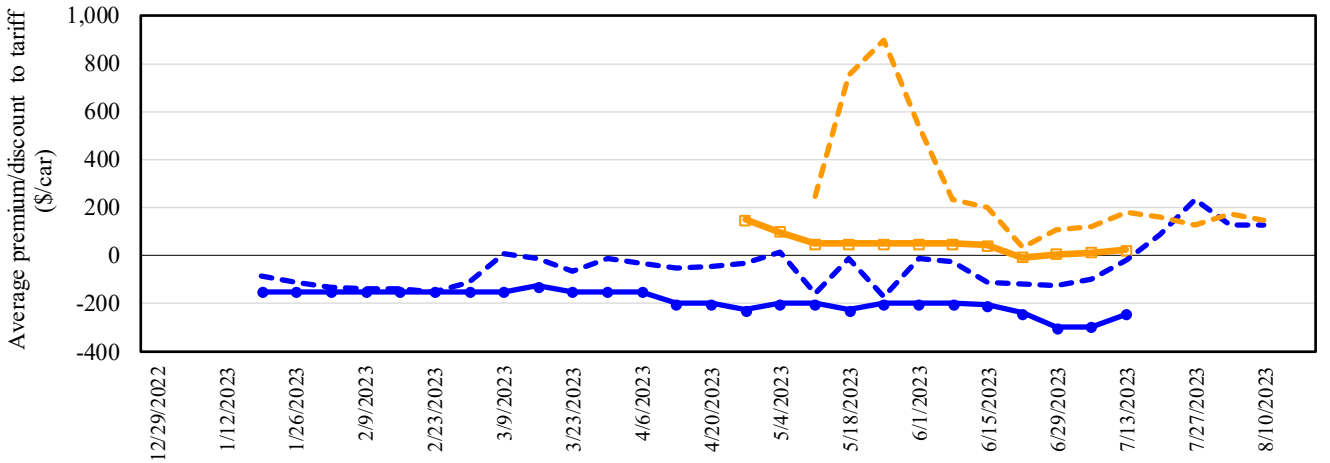


7/13/2023	BNSF	UP
Non-shuttle	$163	-$13
Shuttle	-$100	-$19

Average non-shuttle bids/offers rose $75 this week, and are $175 below the peak.
Average shuttle bids/offers rose $191 this week and are at 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



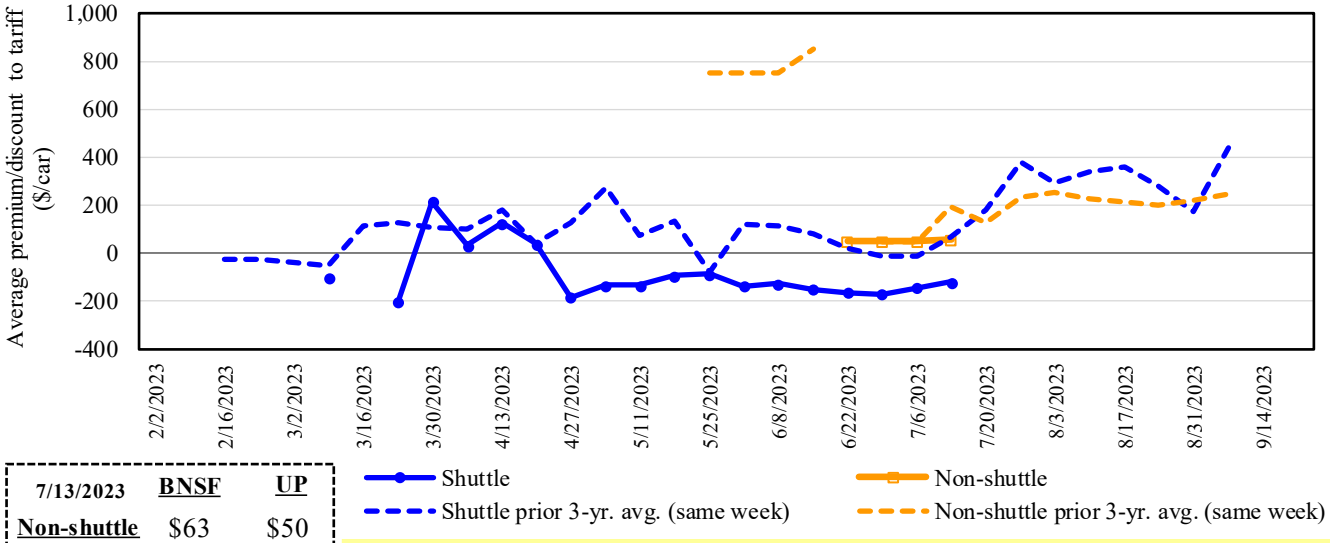
7/13/2023	BNSF	UP
Non-shuttle	$50	$0
Shuttle	-$250	-$238

Average non-shuttle bids/offers rose $13 this week, and are $125 below the peak.
Average shuttle bids/offers rose $52 this week and are $119 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



7/13/2023	BNSF	UP
Non-shuttle	$63	$50
Shuttle	-$142	-$100

Average non-shuttle bids/offers rose $6 this week, and are at the peak.
Average shuttle bids/offers rose $23 this week and are $338 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: 7/13/2023	Delivery period					
		Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Non-shuttle	**BNSF-GF**	**163**	**50**	**63**	**n/a**	**n/a**	**n/a**
	Change from last week	63	25	13	n/a	n/a	n/a
	Change from same week 2022	100	38	-138	n/a	n/a	n/a
	UP-Pool	**-13**	**0**	**50**	**n/a**	**n/a**	**n/a**
	Change from last week	87	0	0	n/a	n/a	n/a
	Change from same week 2022	n/a	-400	-350	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**-100**	**-250**	**-142**	**n/a**	**n/a**	**n/a**
	Change from last week	200	75	21	n/a	n/a	n/a
	Change from same week 2022	0	-88	-408	n/a	n/a	n/a
	UP-Pool	**-19**	**-238**	**-100**	**n/a**	**n/a**	**n/a**
	Change from last week	181	30	25	n/a	n/a	n/a
	Change from same week 2022	-52	-338	-375	n/a	n/a	n/a
	CP-GF	**-100**	**-100**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	0	0	n/a	n/a	n/a	n/a
	Change from same week 2022	-200	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]

July 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	$187	$42.52	$1.16	1
	Grand Forks, ND	Duluth-Superior, MN	$3,858	$51	$38.81	$1.06	2
	Wichita, KS	Los Angeles, CA	$7,640	$260	$78.45	$2.14	-6
	Wichita, KS	New Orleans, LA	$4,825	$329	$51.18	$1.39	-1
	Sioux Falls, SD	Galveston-Houston, TX	$7,376	$214	$75.37	$2.05	-5
	Colby, KS	Galveston-Houston, TX	$5,075	$361	$53.98	$1.47	-2
	Amarillo, TX	Los Angeles, CA	$5,121	$502	$55.84	$1.52	-7
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$372	$43.42	$1.10	-7
	Toledo, OH	Raleigh, NC	$8,551	$413	$89.01	$2.26	1
	Des Moines, IA	Davenport, IA	$2,655	$79	$27.15	$0.69	3
	Indianapolis, IN	Atlanta, GA	$6,593	$310	$68.55	$1.74	1
	Indianapolis, IN	Knoxville, TN	$5,564	$201	$57.25	$1.45	3
	Des Moines, IA	Little Rock, AR	$4,250	$232	$44.50	$1.13	1
	Des Moines, IA	Los Angeles, CA	$6,130	$675	$67.57	$1.72	-5
Soybeans	Minneapolis, MN	New Orleans, LA	$3,472	$546	$39.91	$1.09	-27
	Toledo, OH	Huntsville, AL	$7,037	$294	$72.80	$1.98	1
	Indianapolis, IN	Raleigh, NC	$7,843	$419	$82.04	$2.23	1
	Indianapolis, IN	Huntsville, AL	$5,689	$199	$58.47	$1.59	3
	Champaign-Urbana, IL	New Orleans, LA	$4,865	$372	$52.01	$1.42	-2
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,393	$150	$45.11	$1.23	-4
	Wichita, KS	Galveston-Houston, TX	$4,611	$116	$46.95	$1.28	-6
	Chicago, IL	Albany, NY	$7,090	$390	$74.28	$2.02	1
	Grand Forks, ND	Portland, OR	$6,051	$258	$62.66	$1.71	-6
	Grand Forks, ND	Galveston-Houston, TX	$5,399	$269	$56.29	$1.53	-8
	Colby, KS	Portland, OR	$5,923	$592	$64.69	$1.76	-7
Corn	Minneapolis, MN	Portland, OR	$5,660	$315	$59.33	$1.51	-8
	Sioux Falls, SD	Tacoma, WA	$5,620	$288	$58.67	$1.49	-7
	Champaign-Urbana, IL	New Orleans, LA	$4,170	$372	$45.11	$1.15	-2
	Lincoln, NE	Galveston-Houston, TX	$4,360	$168	$44.96	$1.14	-3
	Des Moines, IA	Amarillo, TX	$4,670	$291	$49.27	$1.25	0
	Minneapolis, MN	Tacoma, WA	$5,660	$312	$59.31	$1.51	-8
	Council Bluffs, IA	Stockton, CA	$5,580	$323	$58.62	$1.49	-8
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,350	$288	$65.92	$1.79	-6
	Minneapolis, MN	Portland, OR	$6,400	$315	$66.68	$1.81	-7
	Fargo, ND	Tacoma, WA	$6,250	$256	$64.61	$1.76	-5
	Council Bluffs, IA	New Orleans, LA	$5,095	$429	$54.86	$1.49	-3
	Toledo, OH	Huntsville, AL	$5,277	$294	$55.33	$1.51	1
	Grand Island, NE	Portland, OR	$5,730	$606	$62.92	$1.71	-1

[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.

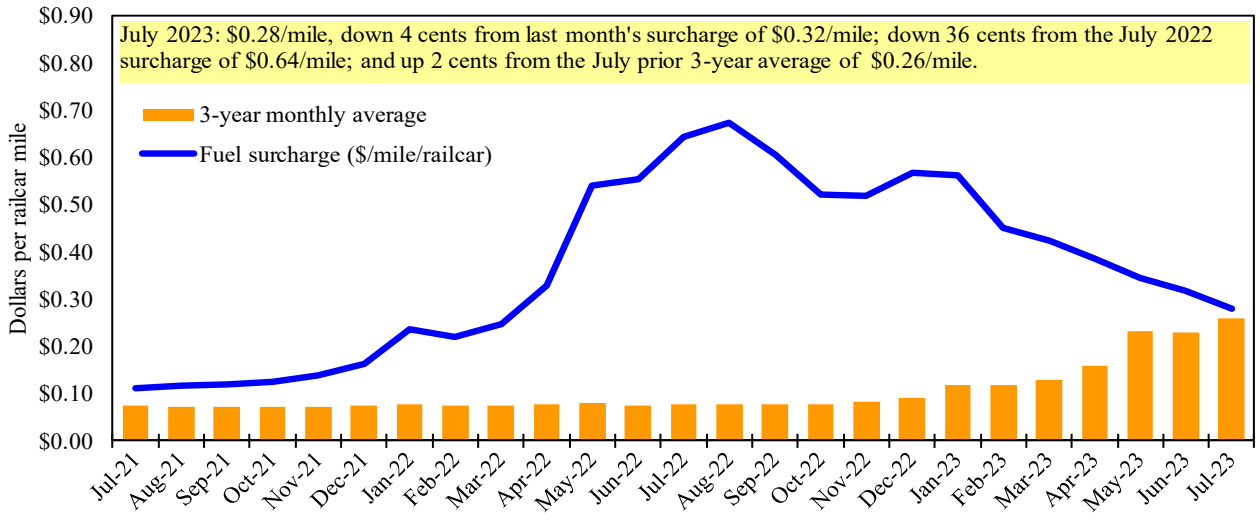
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[5] As of January 1, 2022, both BNSF and Union Pacific Railroad 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]

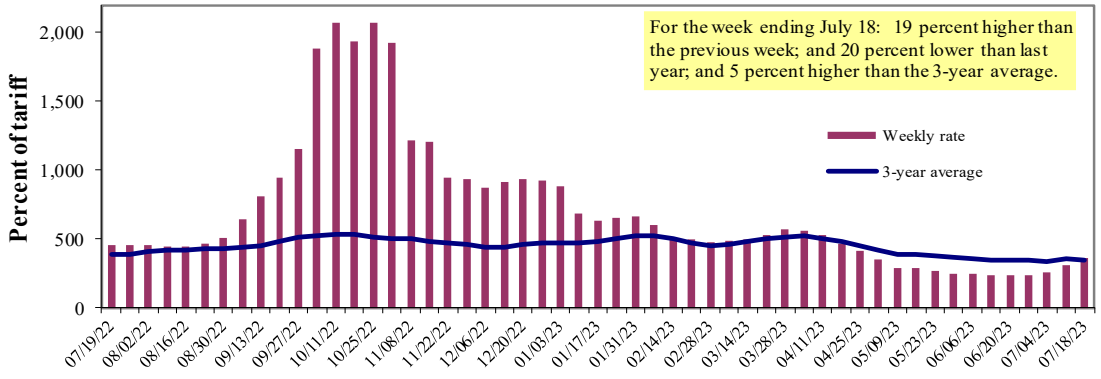


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

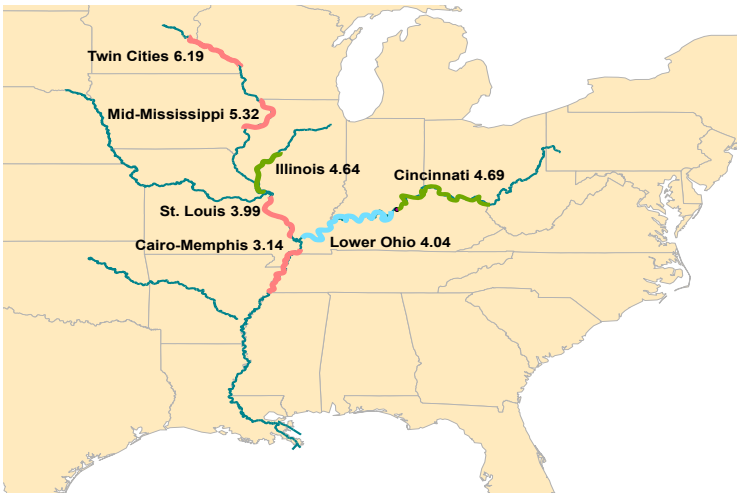
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	7/18/2023	391	384	368	314	296	296	292
	7/11/2023	370	319	310	270	258	258	248
$/ton	7/18/2023	24.20	20.43	17.08	12.53	13.88	11.96	9.17
	7/11/2023	22.90	16.97	14.38	10.77	12.10	10.42	7.79
Current week % change from the same week:								
	Last year	-31	-25	-20	-16	-36	-36	-18
	3-year avg. [2]	-10	8	-	27	3	3	21
Rate[1]	August	464	415	405	384	388	388	388
	October	657	633	618	610	625	625	664

[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

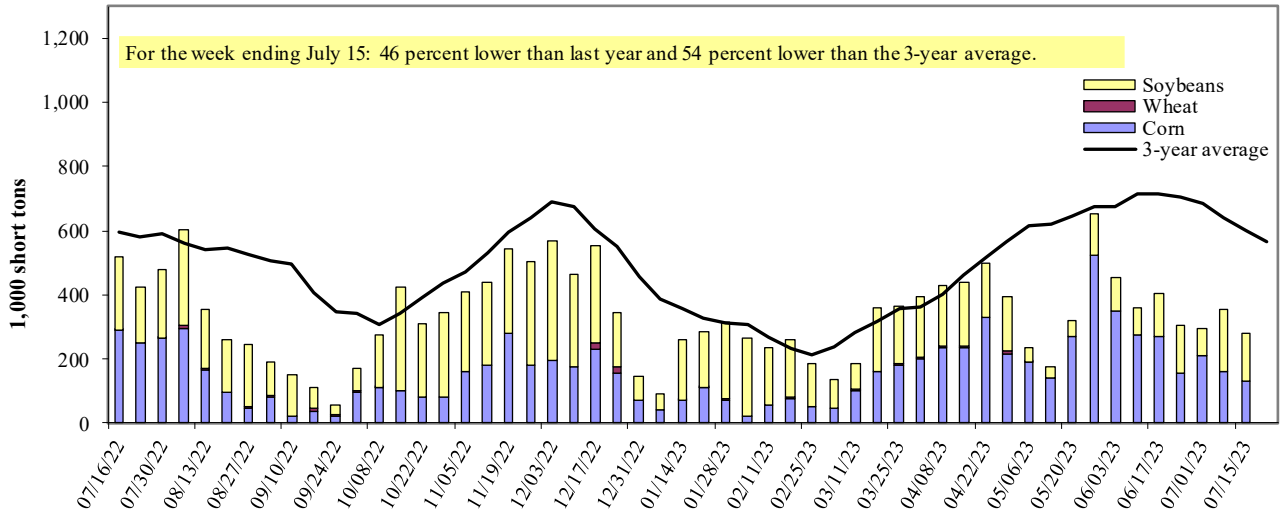
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 07/15/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	88	0	82	0	170
Winfield, MO (L25)	109	0	115	0	224
Alton, IL (L26)	133	0	146	0	279
Granite City, IL (L27)	133	0	146	0	279
Illinois River (La Grange)	32	0	47	3	83
Ohio River (Olmsted)	39	21	53	0	113
Arkansas River (L1)	0	22	0	0	22
Weekly total - 2023	172	44	199	0	414
Weekly total - 2022	353	66	282	9	710
2023 YTD[1]	8,032	732	6,210	159	15,133
2022 YTD[1]	11,486	1,027	6,951	162	19,625
2023 as % of 2022 YTD	70	71	89	98	77
Last 4 weeks as % of 2022[2]	54	69	61	23	58
Total 2022	16,437	1,594	14,464	232	32,727

[1] Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

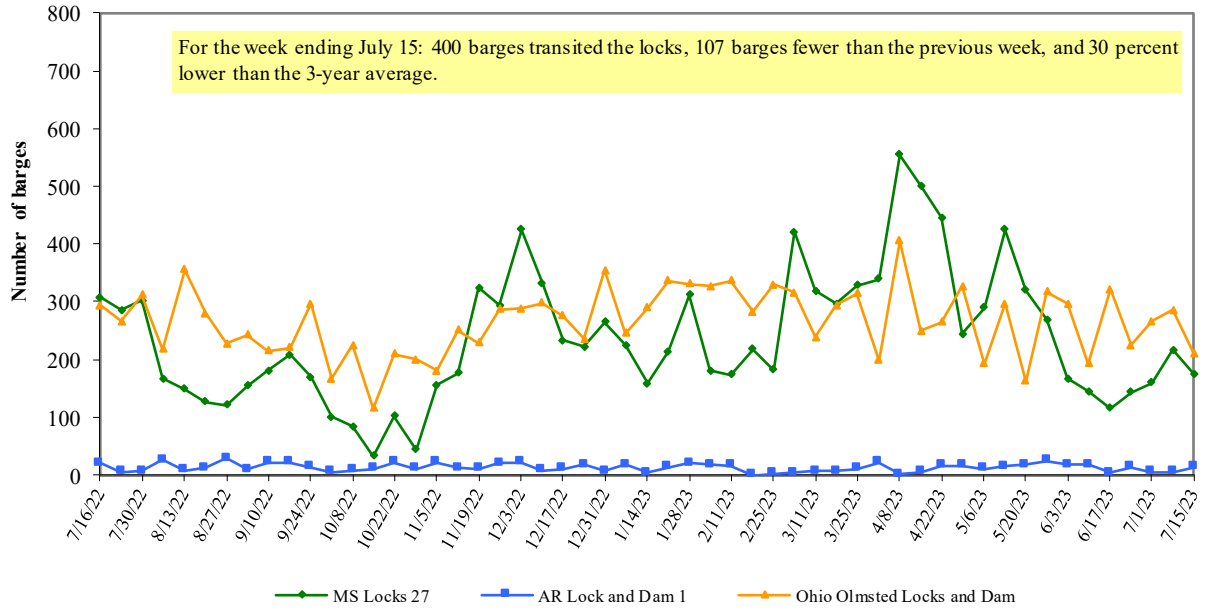
[2] As a percent of same period in 2022.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Figure 10

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

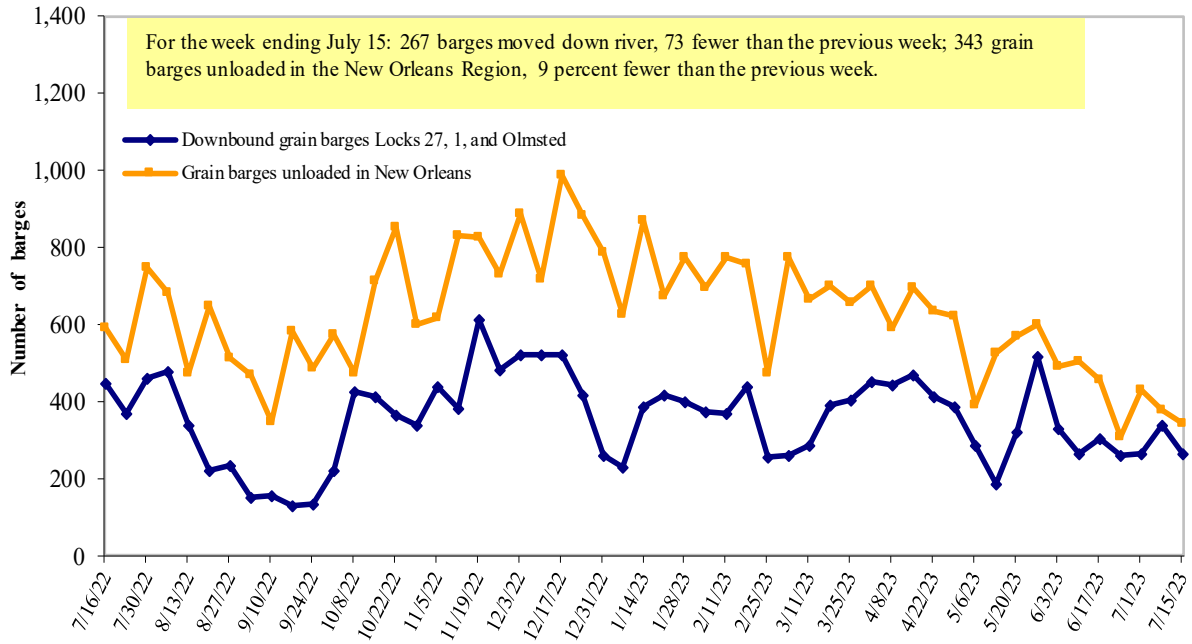


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Figure 11

Grain barges for export in New Orleans region



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

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Truck Transportation

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

Table 10

Retail on-highway diesel prices, week ending 7/17/2023 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.879	0.021	-1.588
	New England	4.081	0.007	-1.612
	Central Atlantic	4.092	0.014	-1.648
	Lower Atlantic	3.779	0.025	-1.561
II	Midwest	3.726	-0.016	-1.683
III	Gulf Coast	3.506	0.001	-1.577
IV	Rocky Mountain	3.927	-0.012	-1.619
V	West Coast	4.465	0.005	-1.651
	West Coast less California	4.131	-0.015	-1.637
	California	4.848	0.027	-1.668
Total	United States	3.806	0.000	-1.626

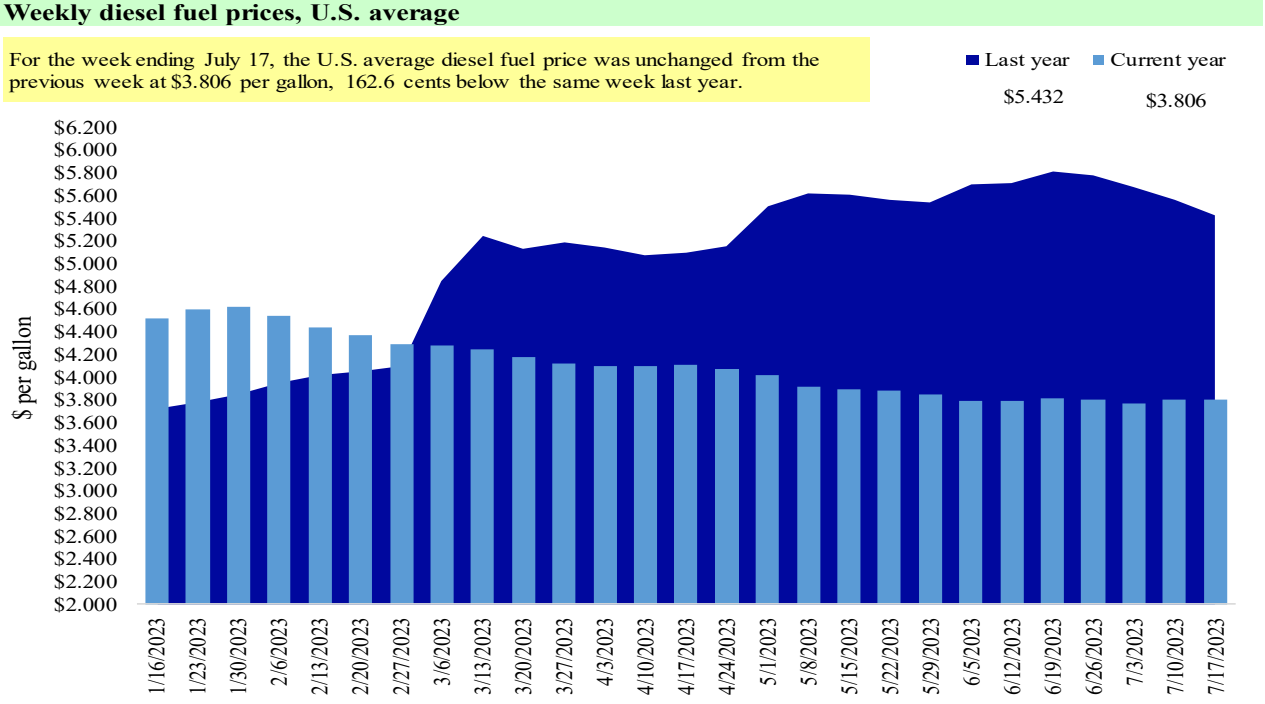
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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.

Figure 12

Weekly diesel fuel prices, U.S. average



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

Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

Grain Exports

Table 11

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

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances[1]									
7/6/2023	633	1,065	1,226	607	43	3,573	4,057	2,900	10,530
This week year ago	1,531	1,141	1,388	1,173	124	5,357	7,002	6,921	19,279
Cumulative exports-marketing year[2]									
2022/23 YTD	354	319	424	330	17	1,444	35,452	49,703	86,599
2021/22 YTD	506	266	622	305	18	1,717	53,415	52,474	107,605
YTD 2022/23 as % of 2021/22	70	120	68	108	97	84	66	95	80
Last 4 wks. as % of same period 2021/22	44	96	81	47	63	66	63	45	57
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 7/06/2023	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	2,433	15,068	16,592	(9)	15,227
China	272	7,579	14,719	(49)	12,616
Japan	746	6,525	9,873	(34)	10,273
Columbia	0	2,195	4,359	(50)	4,398
Korea	0	821	1,474	(44)	2,563
Top 5 importers	**3,451**	**32,188**	**47,017**	(32)	**45,077**
Total U.S. corn export sales	**4,039**	**39,509**	**60,416**	(35)	**56,665**
% of YTD current month's export projection	8%	94%	96%		
Change from prior week[2]	**471**	**469**	**59**		
Top 5 importers' share of U.S. corn export sales	85%	81%	78%		80%
USDA forecast July 2023	**53,435**	**41,985**	**62,901**	(33)	
Corn use for ethanol USDA forecast, July 2023	**134,620**	**132,715**	**135,281**	(2)	

[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 7/06/2023	Total commitments[2]			% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
	2023/24 next MY	2022/23 current MY	2021/22 last MY		
	1,000 mt -				-1,000 mt -
China	1,722	31,172	30,360	3	27,283
Mexico	545	4,729	5,384	(12)	4,929
Egypt	0	1,208	4,086	(70)	3,553
Japan	187	2,356	2,422	(3)	2,266
Indonesia	2	1,624	1,656	(2)	2,116
Top 5 importers	**2,456**	**41,089**	**43,907**	(6)	**40,147**
Total U.S. soybean export sales	**4,154**	**52,602**	**59,394**	(11)	**54,231**
% of projected exports	8%	98%	101%		
change from prior week[2]	**209**	**81**	**(363)**		
Top 5 importers' share of U.S. soybean export sales	59%	78%	74%		**74%**
USDA forecast, July 2023	**50,409**	**53,951**	**58,638**	(8)	

[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 7/06/2023	Total commitments[2]		% change current MY from last MY	Exports[3] 3-yr. avg. 2020-22
	2023/24 current MY	2022/23 last MY		
	1,000 mt -			-1,000 mt -
Mexico	980	1,203	(19)	3,397
Philippines	647	966	(33)	2,615
Japan	607	681	(11)	2,281
China	17	272	(94)	1,740
Korea	393	558	(30)	1,426
Nigeria	100	303	(67)	1,276
Taiwan	338	171	97	944
Thailand	105	125	(16)	643
Colombia	80	272	(71)	537
Indonesia	73	11	567	469
Top 10 importers	**3,340**	**4,563**	(27)	**15,327**
Total U.S. wheat export sales	**5,018**	**7,074**	(29)	**20,411**
% of projected exports	25%	34%		
change from prior week[2]	**396**	**1,017**		
Top 10 importers' share of U.S. wheat export sales	67%	65%		75%
USDA forecast, June 2023	**19,755**	**20,681**	(4)	

[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)

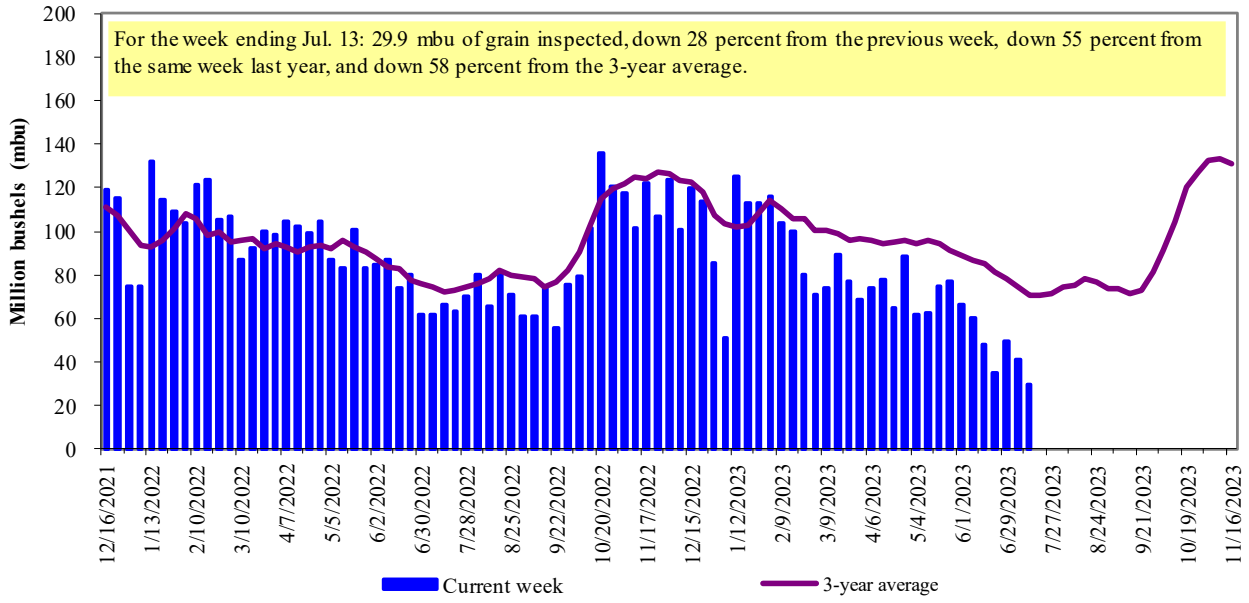
Port regions	For the week ending 07/13/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2022 total*
Pacific Northwest									
Wheat	38	218	17	5,475	4,840	113	125	81	9,836
Corn	0	0	n/a	3,923	8,225	48	7	6	9,615
Soybeans	0	0	n/a	3,521	4,495	78	0	0	14,178
Total	**38**	**218**	**17**	**12,919**	**17,561**	**74**	**43**	**35**	**33,629**
Mississippi Gulf									
Wheat	171	148	115	1,757	2,228	79	136	120	4,053
Corn	223	184	121	14,560	22,339	65	56	55	30,781
Soybeans	89	260	34	13,455	12,445	108	52	61	31,283
Total	**483**	**593**	**81**	**29,773**	**37,012**	**80**	**61**	**62**	**66,116**
Texas Gulf									
Wheat	0	28	0	1,291	1,741	74	60	24	3,421
Corn	0	21	0	144	419	34	80	67	648
Soybeans	0	0	n/a	52	2	n/a	n/a	n/a	685
Total	**0**	**50**	**0**	**1,487**	**2,161**	**69**	**64**	**29**	**4,754**
Interior									
Wheat	44	35	127	1,317	1,560	84	58	67	2,912
Corn	134	138	97	4,997	5,144	97	76	77	8,961
Soybeans	72	52	138	3,245	3,879	84	68	75	7,109
Total	**251**	**225**	**111**	**9,559**	**10,583**	**90**	**70**	**74**	**18,982**
Great Lakes									
Wheat	11	12	94	171	111	153	n/a	100	395
Corn	0	0	n/a	23	118	19	0	0	158
Soybeans	0	0	n/a	31	234	13	0	0	760
Total	**11**	**12**	**94**	**224**	**463**	**48**	**40**	**48**	**1,312**
Atlantic									
Wheat	3	1	n/a	62	38	165	615	387	169
Corn	0	0	n/a	78	197	40	7	20	309
Soybeans	3	4	65	1,209	1,546	78	18	39	2,867
Total	**5**	**4**	**122**	**1,349**	**1,780**	**76**	**18**	**42**	**3,345**
U.S. total from ports*									
Wheat	266	441	60	10,073	10,519	96	108	75	20,786
Corn	357	343	104	23,725	36,442	65	47	45	50,471
Soybeans	164	317	52	21,514	22,600	95	50	61	56,882
Total	**788**	**1,101**	**72**	**55,311**	**69,560**	**80**	**58**	**55**	**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)

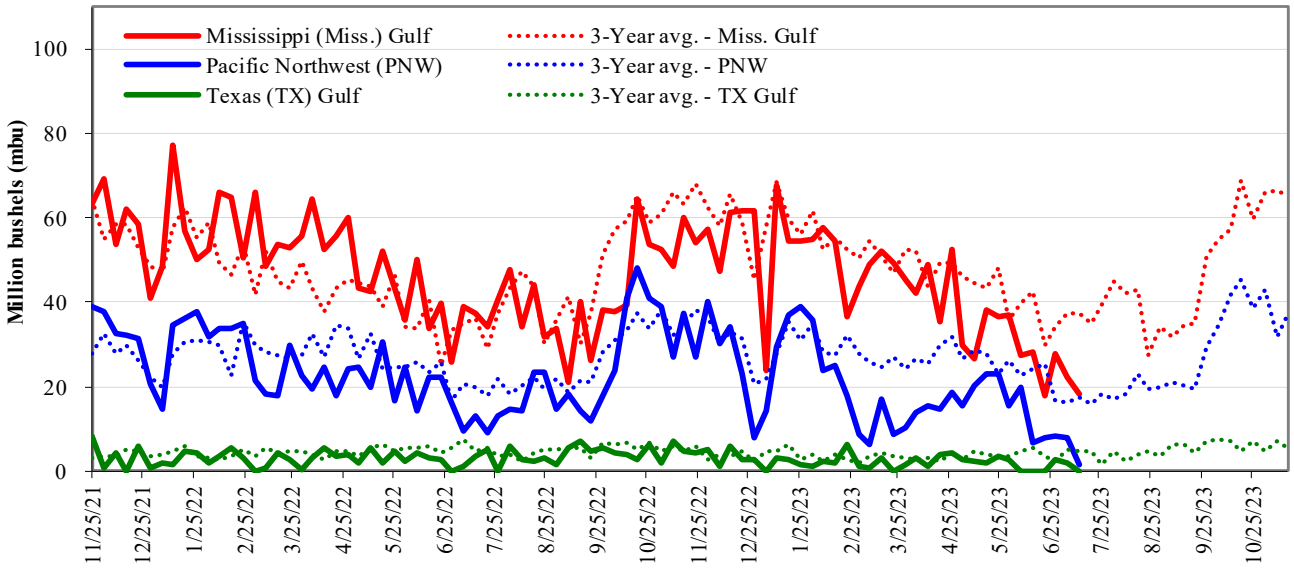


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 07/13/23 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	18.3	Last wk:	down 18	down 100	down 24	down 83
PNW:	1.4	Last Year (same wk):	down 51	down 100	down 55	down 89
TX Gulf:	0.0	3-yr avg. (4-wk. mov. Avg):	down 47	down 100	down 52	down 93

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

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

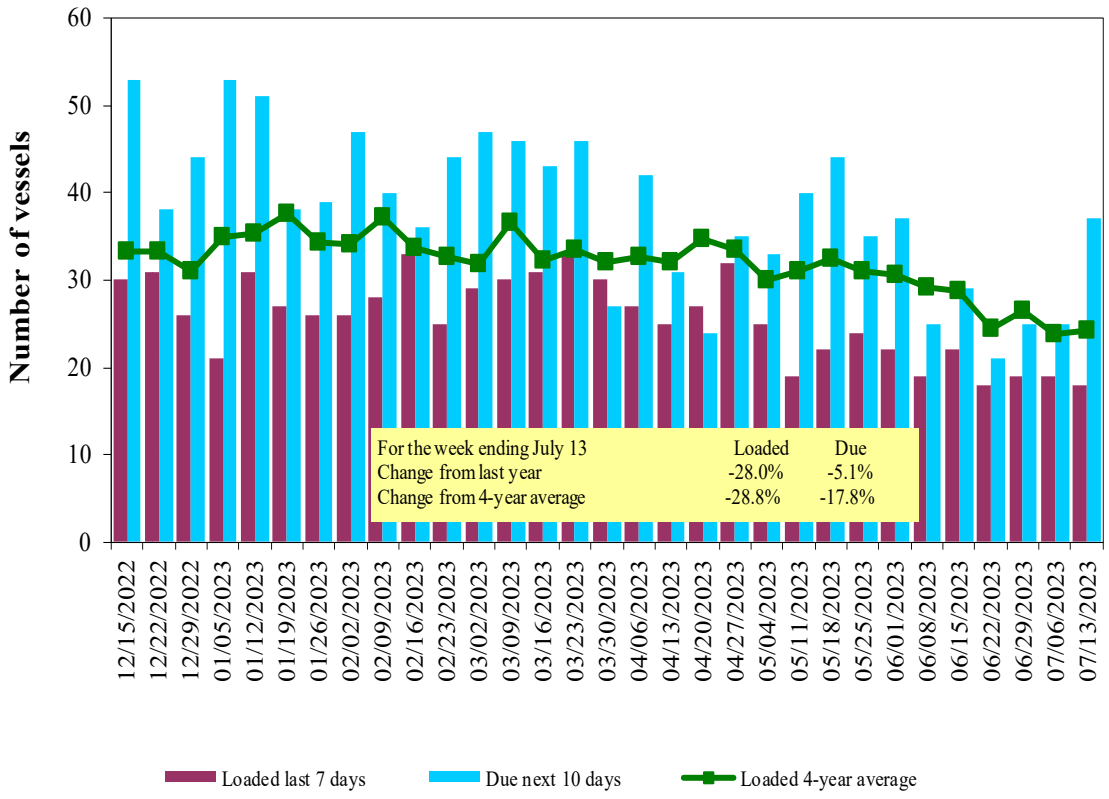
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
7/13/2023	20	18	37	5
7/6/2023	22	19	25	4
2022 range	(14…61)	(18…39)	(28...62)	(5…23)
2022 average	30	28	44	13

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

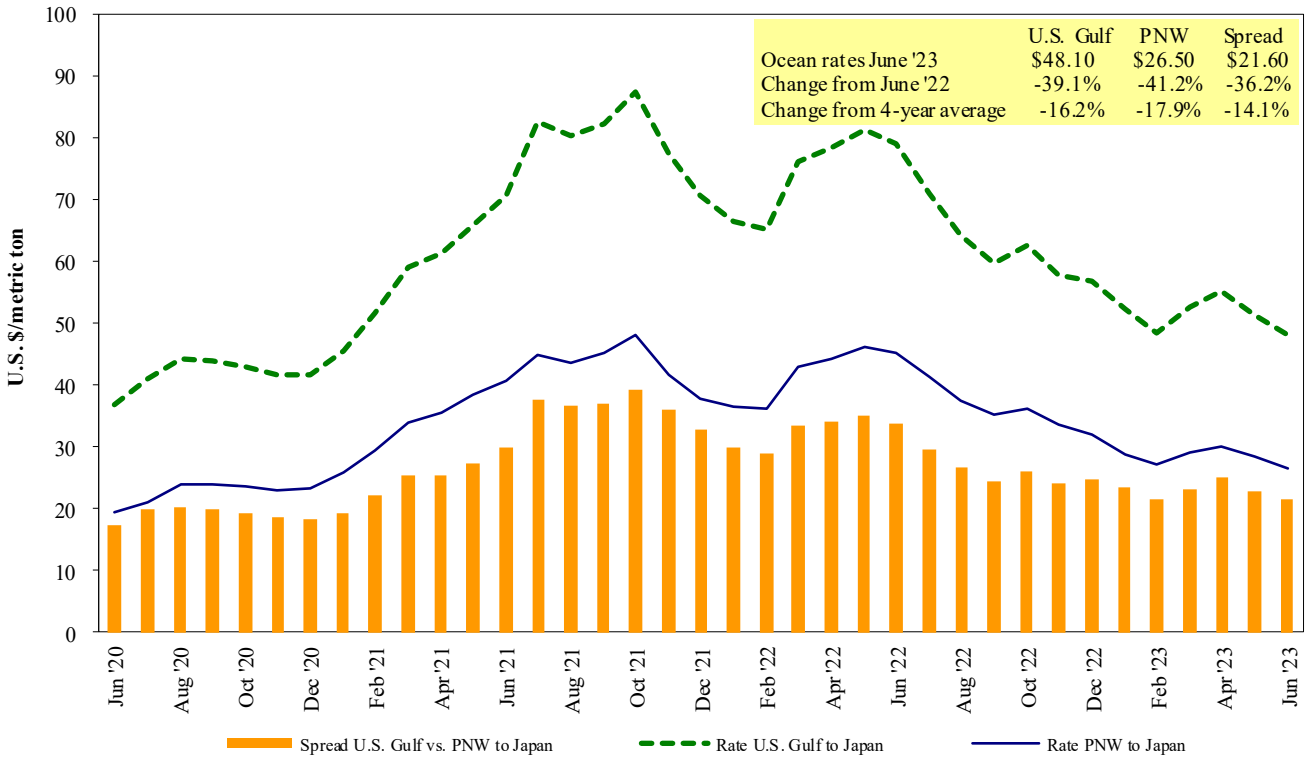


[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.

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 07/15/2023

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	Indonesia	Soybean Meal	Jul 21/31, 2023	35,000	106.00*
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
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

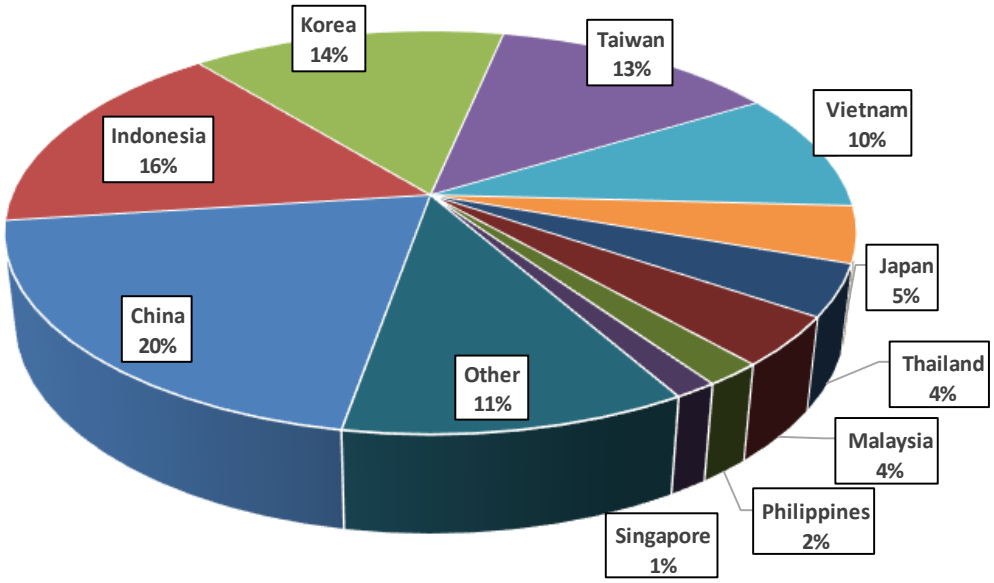
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

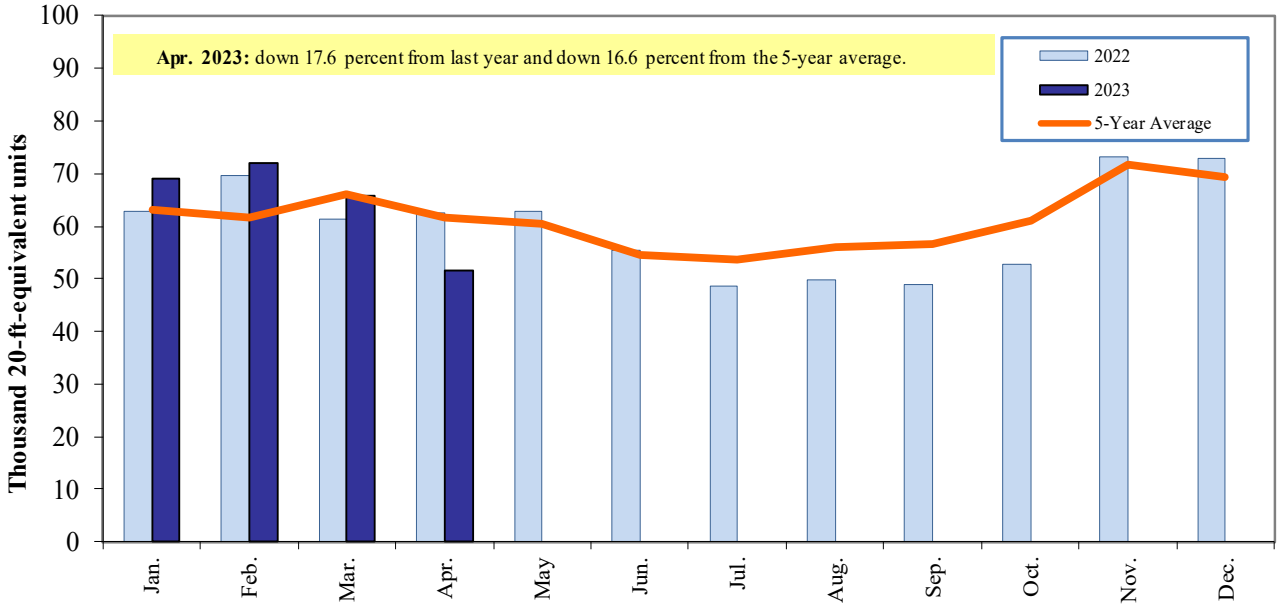
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2023



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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