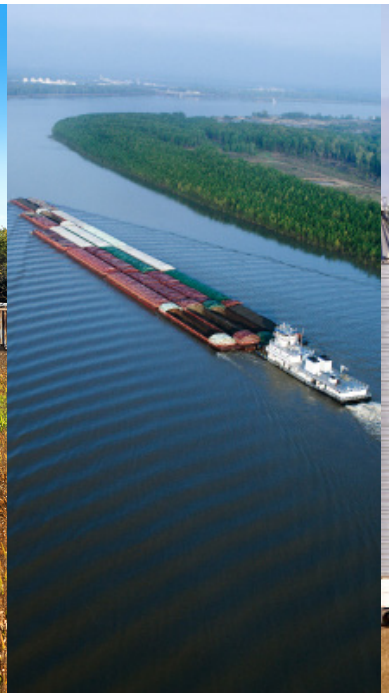
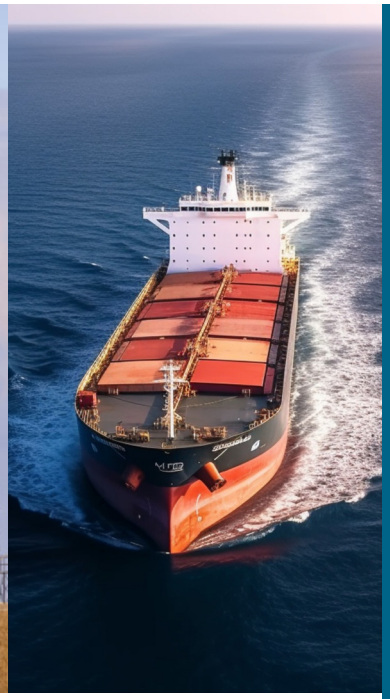
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

August 1, 2024
A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

STB Requests Information on Fall Harvest Plans from BNSF. On July 23, the Chair of the Surface Transportation Board (STB) requested information from BNSF Railway (BNSF) on how the railroad plans to handle the upcoming fall harvest. Specifically, STB has asked for BNSF's expected grain transportation demand, employee counts and hiring plans, locomotive availability, an overview of BNSF's winter plan, and contingency plans related to ongoing Mexican rail disruptions.

STB's request was prompted by Upper Midwest shipper concerns about last winter's poor rail service and about high freight rates going into this year's harvest. STB has asked BNSF to respond by August 13. During STB's National Grain Car Council meeting on August 27 in Kansas City, MO, STB will have another opportunity to gather information on grain transportation. That information will come from BNSF, as well as other Class I railroads, short line railroads, shippers, and private car owners/manufacturers.

Port of Long Beach Breaks Ground on $1.5 Billion Container Railyard. On July 18, the Port of Long Beach broke ground on the Pier B On-Dock Rail Support Facility—a $1.5 billion project that aims to significantly expand the port's container handling capacity.

The port plans to expand the railyard (from 82 to 171 acres), develop a depot for fueling up to 30 locomotives at once, and introduce a staging area to facilitate the assembly and breakdown of longer trains (up to 10,000 feet long). The railyard expansion will triple the amount of cargo the port can handle annually, from 1.5 million 20-foot equivalent units (TEUs) to 4.7 million TEUs. The project will be constructed in phases, with completion by 2032.

In 2023, the Port of Long Beach exported 1.8 million metric tons of containerized grain—the third highest among U.S. ports. Much of the grain exported through the Los Angeles and Long Beach port region arrives from the Midwest by rail. The expansion of on-dock rail connectivity will give those movements more direct terminal access and reduce the number of local truck moves.

UP Announces Ethanol Tariff Increases. Union Pacific Railroad (UP) recently announced tariff rate increases for ethanol shipments that will take effect on October 1. UP plans to raise tariff rates by $400 per car for unit trains and $400-475 for manifest shipments.

Ethanol production is concentrated in the Midwest, and three States (Iowa, Nebraska, and Illinois) account for half of the Nation's total production. While most ethanol is used domestically as a fuel additive for blending with gasoline, ethanol exports account for about 9 percent of total ethanol production. The top customs district for U.S. ethanol exports is Houston-Galveston, TX (*Grain Transportation Report, July 18, 2024*).

UP serves several destination terminals for ethanol unit trains in the Houston-Galveston, TX, customs district—including Texas City, Houston, and Galveston. Currently (before the tariff rate increases take effect on October 1), the tariff rate is $6,070 per tank car for ethanol unit trains (minimum of 113 cars) from Columbus, NE, to Houston-Galveston export terminals.

ATRI Releases 2024 Analysis of the Operational Costs of Trucking Report. The American Transportation Research Institute (ATRI) recently released its 2024 *Analysis of the Operational Costs of Trucking* report.

According to the analysis, the overall marginal costs of operating a truck were $2.270 per mile in 2023. With surcharge-protected fuel costs excluded, marginal costs rose 6.6 percent to $1.716 per mile from 2022 to 2023 (year to year). Barring truck insurance premiums (which rose 12.5 percent after 2 years of negligible change), expenses rose moderately year to year, across most categories. Average costs across most line items rose at less than half the rate from 2022 to 2023 than for 2020-21 and 2021-22.

Multiple challenges to operational efficiency faced the soft freight market in 2023. Notably, deadhead mileage (i.e., mileage without a load—a critical financial drain), rose year to year by an average of 16.3 percent for all non-tank truck sectors, and driver turnover rose by 5 percentage points in the truckload sector. Combined with low freight rates, these challenges hurt profitability industrywide.

For additional transportation news related to grain and other agricultural products, see the Transportation Updates and Regulatory News page on AgTransport. A dataset of all news entries since January 2023 is also available on AgTransport.

Export Sales

For the week ending July 18, **unshipped balances** of corn and soybeans for marketing year (MY) 2023/24 totaled 10.97 million metric tons (mmt), down 10 percent from last week and up 71 percent from the same time last year. The **unshipped balance** of wheat for MY 2024/25 was 5.56 mmt, up 1 percent from last week and up 66 percent from the same time last year.

Net **corn export sales** for MY 2023/24 were 0.33 mmt, down 24 percent from last week. Net **soybean export sales** were 0.09 mmt, down 61 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.31 mmt, down 47 percent from last week.

Rail

U.S. Class I railroads originated 20,162 **grain carloads** during the week ending July 20. This was a 21-percent decrease from the previous week, 11 percent more than last year, and 6 percent fewer than the 3-year average.

Average August **shuttle secondary railcar bids/offers** (per car) were $181 above tariff for the week ending July 25. This was $94 less than last week and $281 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $281 above tariff. This was $98 less than last week, and $181 more than this week last year.

Barge

For the week ending July 27, **barged grain movements** totaled 658,708 tons. This was 108 percent more than the previous week and 46 percent more than the same period last year.

For the week ending July 27, 424 grain barges **moved down river**—199 more than last week. There were 472 grain barges **unloaded** in the New Orleans region, 18 percent more than last week.

Ocean

For the week ending July 25, 22 **oceangoing grain vessels** were loaded in the Gulf—10 percent more than the same period last year. Within the next 10 days (starting July 26), 38 vessels were expected to be loaded—46 percent more than the same period last year.

As of July 25, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $60.00, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $31.75 per mt, unchanged from the previous week.

Fuel

For the week ending July 29, the U.S. average **diesel price** decreased 1.1 cents from the previous week to $3.768 per gallon, 35.9 cents below the same week last year.

Landed Costs to Mexico and U.S. Border Fell From Fourth Quarter 2023 to First Quarter 2024

Low transportation and landed costs are vital to the competitiveness of shipments of U.S. grain to Mexico and globally. A top importer of U.S. grain, Mexico receives U.S. grain either by cross-border land movements or by sea movements to Mexican ports for inland distribution. This article examines the costs of transporting U.S. grain to Mexico over land to various U.S.-Mexico border locations (land

Table 1. Quarterly costs of transporting U.S. grain to Veracruz, Mexico and U.S.-Mexico border locations

	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 1st qtr.	2023 4th qtr.	2024 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 1st qtr.	2023 4th qtr.	2024 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Corn									
	IL origin					IA origin				
Truck	14.75	16.75	16.11	9.2	-3.8	5.42	6.34	6.61	22.0	4.3
Rail	-	-	-	-	-	60.89	61.80	60.16	-1.2	-2.7
Barge	30.28	27.06	20.61	-31.9	-23.8	-	-	-	-	-
Ocean	18.75	19.74	19.43	3.6	-1.6	-	-	-	-	-
Total transportation cost	63.78	63.55	56.15	-12.0	-11.6	66.31	68.14	66.77	0.7	-2.0
Farm value	257.99	187.79	172.30	-33.2	-8.2	266.00	191.72	179.26	-32.6	-6.5
Landed cost	321.77	251.34	228.45	-29.0	-9.1	332.31	259.86	246.03	-26.0	-5.3
Transport % of landed cost	20	25	25	4.76	-0.71	20	26	27	7.18	0.9
	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 1st qtr.	2023 4th qtr.	2024 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 1st qtr.	2023 4th qtr.	2024 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Soybeans									
	IL origin					MO origin				
Truck	14.75	16.75	16.11	9.2	-3.8	5.42	6.34	6.61	22.0	4.3
Rail	-	-	-	-	-	54.94	55.76	54.59	-0.6	-2.1
Barge	30.28	27.06	20.61	-31.9	-23.8	-	-	-	-	-
Ocean	18.75	19.74	19.43	3.6	-1.6	-	-	-	-	-
Total transportation cost	63.78	63.55	56.15	-12.0	-11.6	60.36	62.10	61.20	1.4	-1.4
Farm value	543.81	480.12	451.95	-16.9	-5.9	557.28	476.44	449.50	-19.3	-5.7
Landed cost	607.59	543.67	508.10	-16.4	-6.5	617.64	538.54	510.70	-17.3	-5.2
Transport % of landed cost	10	12	11	0.55	-0.64	10	12	12	2.21	0.5

table 1 continues on page 5

table 1 continued from page 4

	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 1st qtr.	2023 4th qtr.	2024 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 1st qtr.	2023 4th qtr.	2024 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Wheat									
	KS origin					KS origin				
Truck	5.42	6.34	6.61	22.0	4.3	5.42	6.34	6.61	22.0	4.3
Rail	45.58	47.92	54.21	18.9	13.1	46.78	49.29	48.59	3.9	-1.4
Ocean	18.75	19.74	19.43	3.6	-1.6	-	-	-	-	-
Total transportation cost	69.75	74.00	80.25	15.1	8.4	52.20	55.63	55.20	5.7	-0.8
Farm value	309.99	231.36	212.50	-31.4	-8.2	309.99	231.36	212.50	-31.4	-8.2
Landed cost	379.74	305.36	292.75	-22.9	-4.1	362.19	286.99	267.70	-26.1	-6.7
Transport % of landed cost	18	24	27	9	3	14	19	21	6	1.2

Note: Land routes to Mexico previously relied on rail rate data through the border to Guadalajara. However, in January 2022, because of a new Mexican tax, the U.S. railroads stopped publishing tariff rates for the complete "through" shipment from a U.S. origin to a Mexican destination. The railroads reported rates only to the U.S.–Mexico border (first highlight, *Grain Transportation Report*, July 4, 2024). Beginning this quarter (and adjusted for first and fourth quarters 2023 for comparability), the rail rates shown reflect only the route from the U.S. origin to the border. The total cost of the shipment would include a separate rate obtained from a Mexican railroad (not shown). It could also include additional costs (not shown) of purchasing empty rail cars in the secondary market. Also, please note Missouri has replaced Nebraska in the data, as a representative origin for soybeans exported to Mexico over land. Landed cost is the total transportation cost plus farm value. "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Sources: Ocean freight rates are from O'Neil Commodity Consulting, and farm values are from USDA, National Agricultural Statistics Service and compiled by USDA, Agricultural Marketing Service.

routes) and by sea to Veracruz (water routes), tracking changes over time (table 1).[1]

Quarter-to-Quarter Transportation Costs. From fourth quarter 2023 to first quarter 2024 (quarter to quarter), total transportation costs decreased for U.S. corn and soybeans, shipped both by water and land, and for wheat shipped by land.[2] For the water routes, falling transportation costs reflected falling costs of all modes of transportation. Truck rates dropped partly because of lower diesel prices (**GTR fig. 14** and ***Grain Truck and Ocean Rate Advisory*, first quarter 2024**). Barge rates fell because of improved navigation conditions in the Mississippi River System and fewer inspections at the U.S. Gulf. Rail rates (public tariff, plus fuel surcharge) fell partly because of a decrease in fuel surcharges. Ocean freight rates also fell.

Year-to-Year Transportation Costs. From first quarter 2023 to first quarter 2024 (year to year), the total transportation costs of shipping U.S. corn and soybeans to Mexico by the water routes fell because of falling truck, barge, and ocean rates. However, the costs of shipping wheat to Mexico by the water and land routes rose, because of higher truck and rail tariff rates. The rising costs of shipping corn and soybeans by land were reflected in higher truck rates.

Quarter-to-Quarter Landed Costs. Quarter to quarter, landed costs fell for all grains shipped by the water and land routes. For corn

1 Land routes to Mexico previously relied on rail rate data through the border to Guadalajara. However, in January 2022, because of a new Mexican tax, the U.S. railroads stopped publishing tariff rates for the complete "through" shipment from a U.S. origin to a Mexican destination. The railroads reported rates only to the U.S.–Mexico border (first highlight, *Grain Transportation Report*, July 4, 2024). Beginning this quarter (and adjusted for first quarter 2023 for comparability), the rail rates shown reflect only the route from the U.S. origin to the border. The total cost of the shipment would include a separate rate obtained from a Mexican railroad (not shown). It could also include additional costs (not shown) of purchasing empty rail cars in the secondary market. Also, please note Missouri has replaced Nebraska in the data, as a representative origin for soybeans exported to Mexico over land.

2 Water routes typically involve truck transportation to barge to oceangoing vessel, or else, truck to rail to oceangoing vessel.

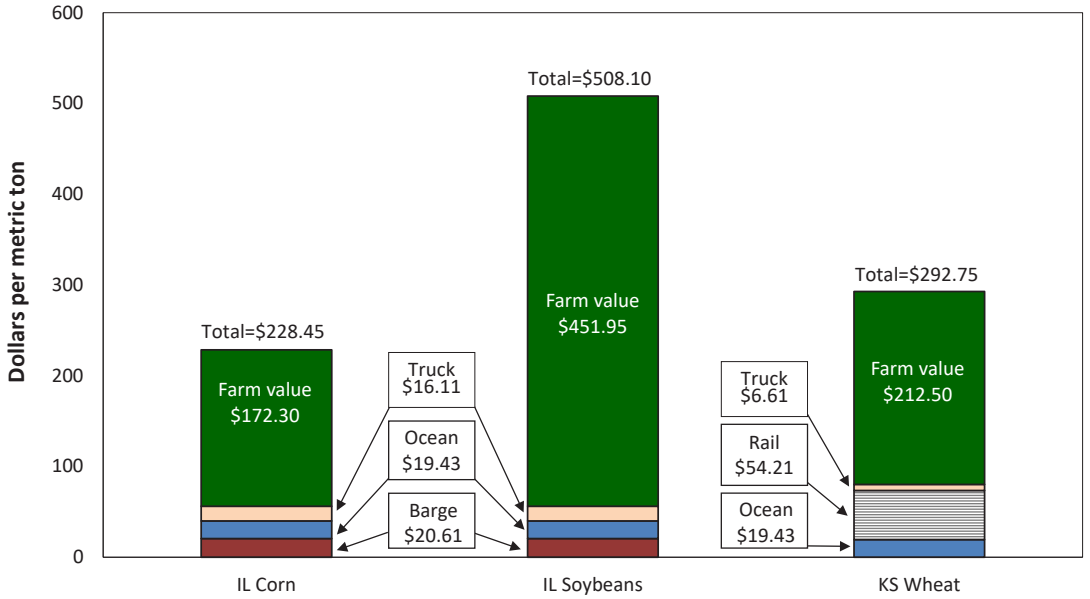
and soybeans shipped by the water routes, and for all grains shipped by the land routes, lower landed costs reflected a decline in both transportation costs and farm values. However, for waterborne wheat, lower landed costs reflected a drop in farm values that exceeded the rise in transportation costs (table 1 and figs. 1 and 2). The share of landed costs comprising transportation ranged from 11 percent to 27 percent for the water routes and from 12 percent to 27 percent for the land routes.

Year-to-Year Landed Costs. Year to year, landed costs decreased for waterborne corn, soybeans, and wheat, because of both lower transportation costs and lower farm values. For land-route corn, soybeans, and wheat, the decrease in farm values outweighed the increase in transportation costs, causing landed costs to fall.

U.S. Inspections for Export to Mexico. According to USDA's Federal Grain Inspection Service, the United States inspected 5.1 million metric tons (mmt) of corn, 1.2 mmt of soybeans, and 0.9 mmt of wheat for export to Mexico in first quarter 2024. Quarter to quarter, U.S. inspections for export to Mexico were up 10 percent for corn, down 6 percent for soybeans, and up 41 percent for wheat. Year to year, U.S. inspections destined to Mexico rose 34 percent for corn, fell 6 percent for soybeans, and rose 14 percent for wheat. Lower landed costs for corn and wheat are consistent with quarter-to-quarter and year-to-year increases in corn and soybean shipments to Mexico.

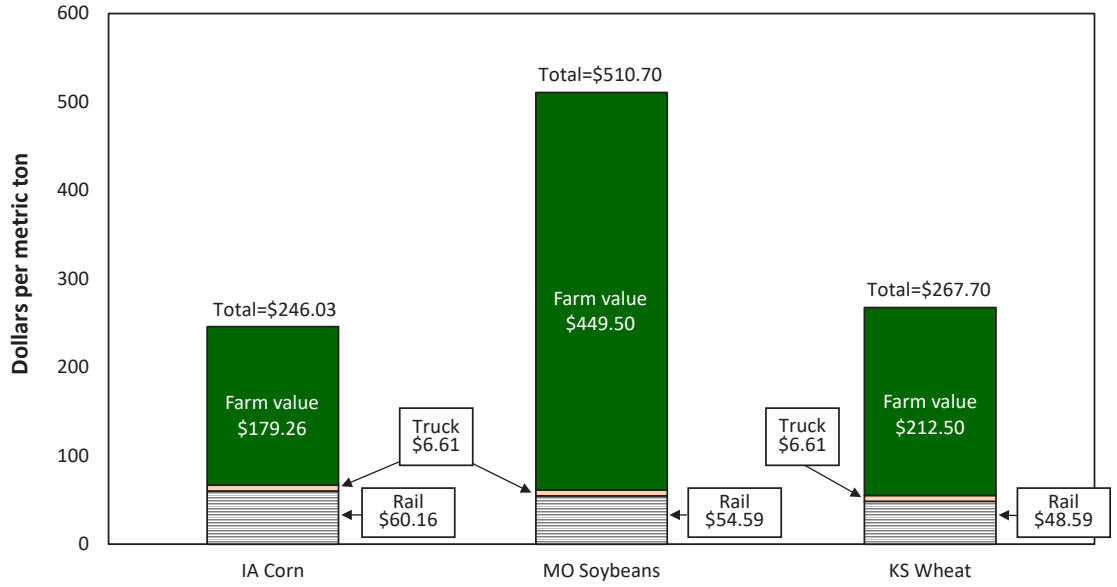
surajudeen.olowolayemo@usda.gov

Figure 1. First-quarter 2024 water-route landed costs to Veracruz, Mexico



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

Figure 2. First-quarter 2024 land-route landed costs to U.S.-Mexico border locations



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

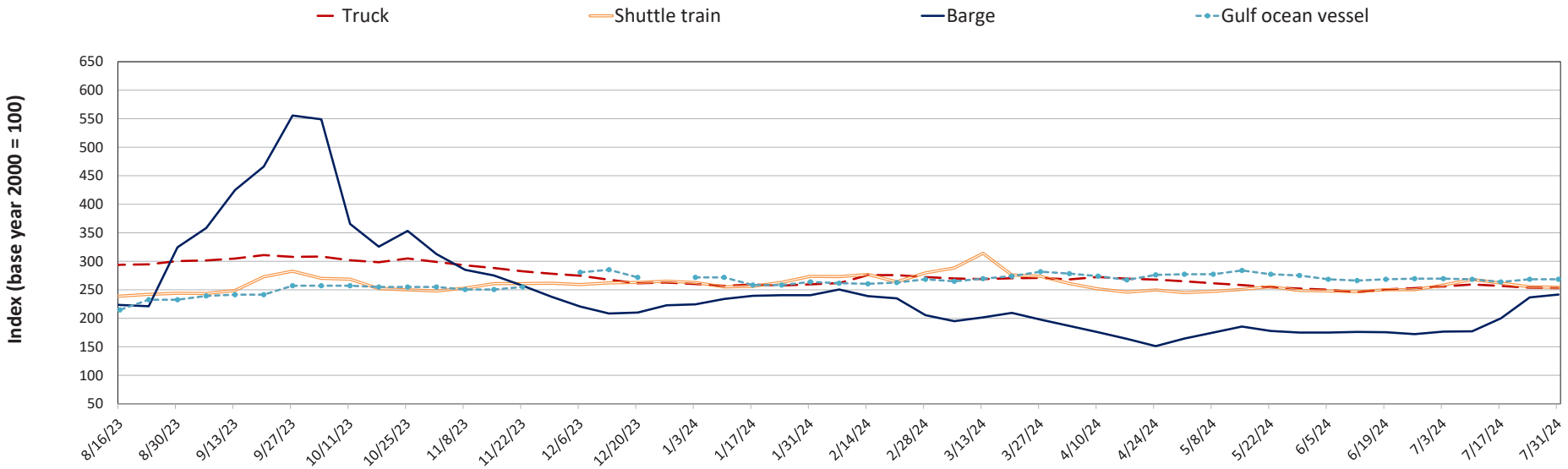
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
07/31/24	253	333	254	242	268	225
07/24/24	254	326	255	237	268	225
08/02/23	277	321	243	219	201	177

Note: 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.
Source: USDA, Agricultural Marketing Service.

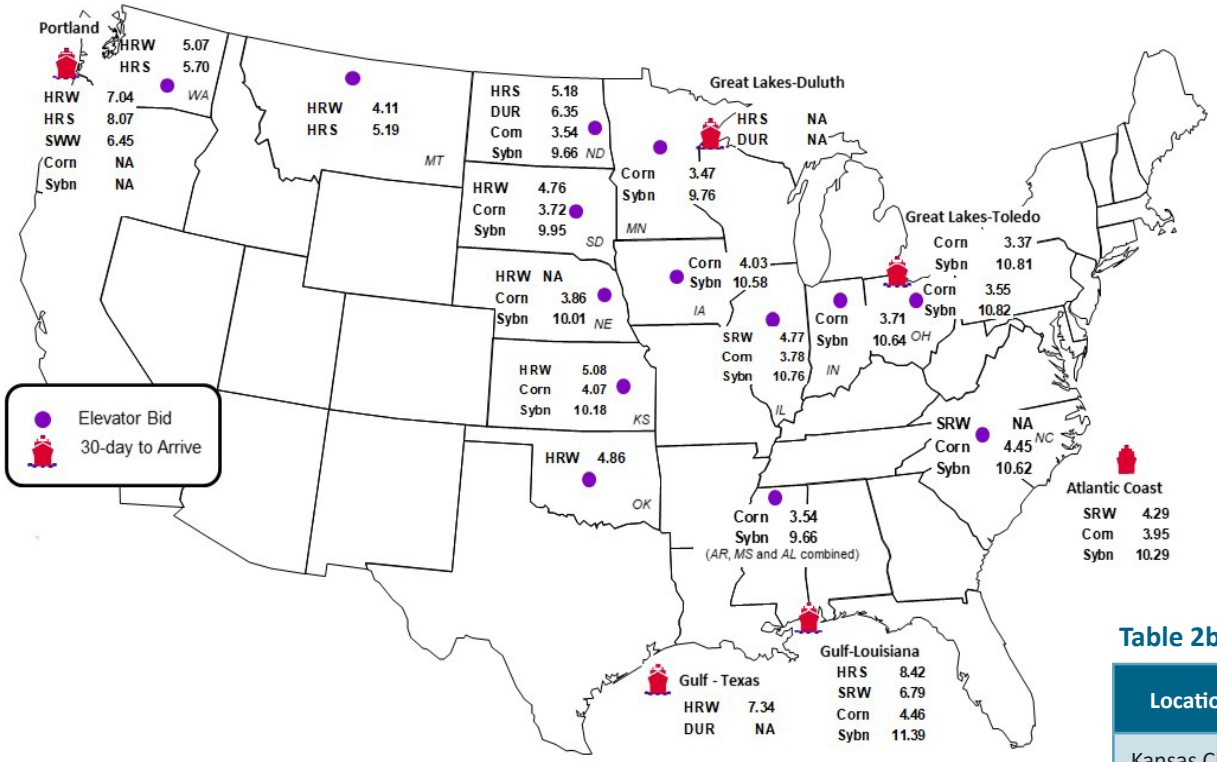
Figure 1. Grain transportation cost indicators as of week ending 07/31/24



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

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.



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

Commodity	Origin–destination	7/26/2024	7/19/2024
Corn	IL–Gulf	-0.68	-0.68
Corn	NE–Gulf	-0.60	-0.55
Soybean	IA–Gulf	-0.81	-0.98
HRW	KS–Gulf	-2.26	-2.02
HRS	ND–Portland	-2.89	-2.71

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
Source: USDA, Agricultural Marketing Service.

Table 2b. Futures

Location	Grain	Month	7/26/2024	Week ago 7/19/2024	Year ago 7/28/2023
Kansas City	Wheat	Sep	5.466	5.680	8.396
Minneapolis	Wheat	Sep	5.884	6.096	8.802
Chicago	Wheat	Sep	5.236	5.410	6.796
Chicago	Corn	Sep	4.066	4.094	5.164
Chicago	Soybean	Sep	10.212	10.544	13.552

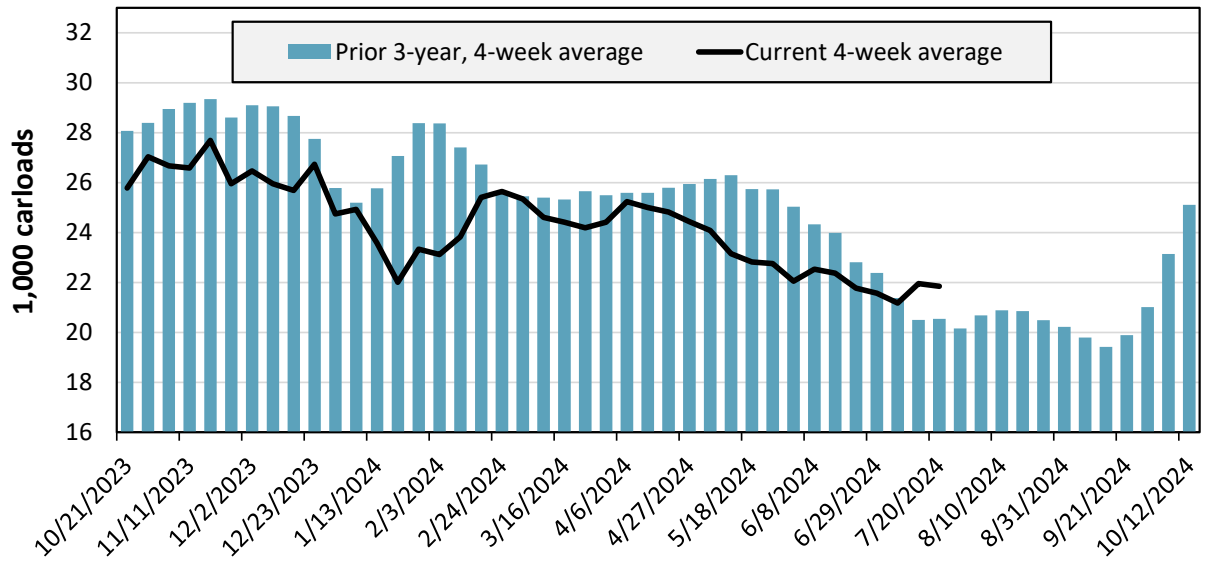
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 7/20/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	2,257	2,685	8,025	4,333	2,033	829	20,162
This week last year	1,322	2,431	6,629	4,599	1,942	1,186	18,109
2024 YTD	48,125	77,056	302,095	148,320	78,442	26,687	680,725
2023 YTD	53,646	78,469	257,986	154,512	65,540	38,936	649,089
2024 YTD as % of 2023 YTD	90	98	117	96	120	69	105
Last 4 weeks as % of 2023	137	105	141	110	128	107	125
Last 4 weeks as % of 3-yr. avg.	117	107	111	95	118	85	106
Total 2023	92,754	130,762	499,462	278,079	131,352	66,535	1,198,944

Note: The last 4-week percentages compare the last 4 weeks of this year to the closest 4 weeks of last year, and to the average across the prior 3 years. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.
Source: Surface Transportation Board.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending July 20, grain carloads were down 1 percent from the previous week, up 25 percent from last year, and up 6 percent from the 3-year average.

Source: Surface Transportation Board.

Table 4a. Rail service metrics—grain unit train origin dwell times and train speeds

For the week ending: 7/20/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	31.4	29.8	25.2	18.2	9.0	25.5	35.4	24.9
	Average over last 4 weeks	29.1	29.1	25.1	18.7	8.3	26.3	37.4	24.8
	Average of same 4 weeks last year	42.8	26.0	15.1	14.5	6.0	18.9	20.2	20.5
Grain unit train speeds (miles per hour)	This week	23.5	20.6	24.8	22.4	24.9	19.1	23.2	22.6
	Average over last 4 weeks	23.4	20.2	24.5	22.4	24.5	19.2	24.4	22.7
	Average of same 4 weeks last year	23.5	15.7	25.4	22.8	27.2	20.5	26.8	23.1

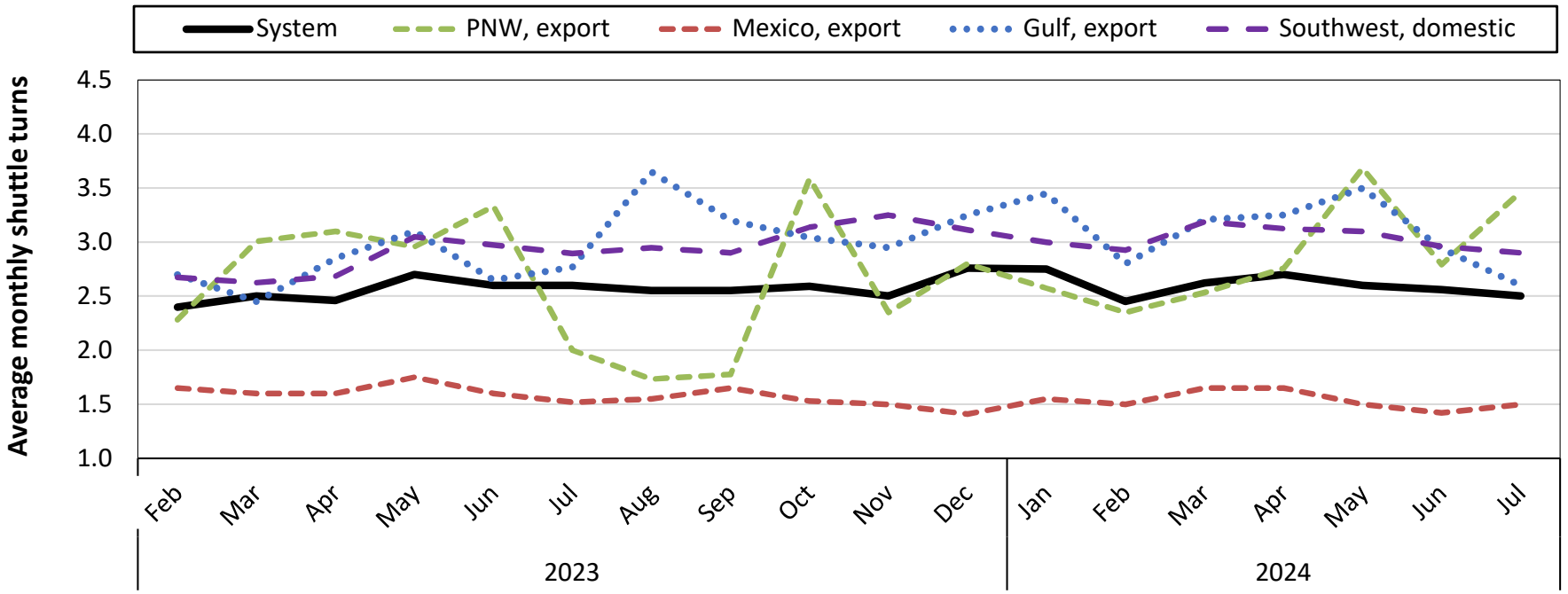
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

Table 4b. Rail service metrics—unfilled grain car orders and delays

For the week ending: 7/20/2024		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Empty grain cars not moved in over 48 hours (number)	This week	14	9	506	93	1	55	20	699
	Average over last 4 weeks	11	10	542	105	7	58	53	785
	Average of same 4 weeks last year	22	14	552	65	10	55	27	744
Loaded grain cars not moved in over 48 hours (number)	This week	15	137	748	84	5	158	73	1,219
	Average over last 4 weeks	28	151	917	95	5	104	73	1,372
	Average of same 4 weeks last year	17	292	347	82	10	66	37	851
Grain unit trains held (number)	This week	0	0	21	5	0	4	7	37
	Average over last 4 weeks	0	1	22	6	0	5	6	40
	Average of same 4 weeks last year	1	5	7	6	0	1	3	22
Unfilled grain car orders (number)	This week	0	0	833	259	0	175	0	1,267
	Average over last 4 weeks	5	2	830	251	0	96	33	1,217
	Average of same 4 weeks last year	5	14	266	120	0	42	62	509

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

Figure 4. Average monthly turns for grain shuttle trains, by region

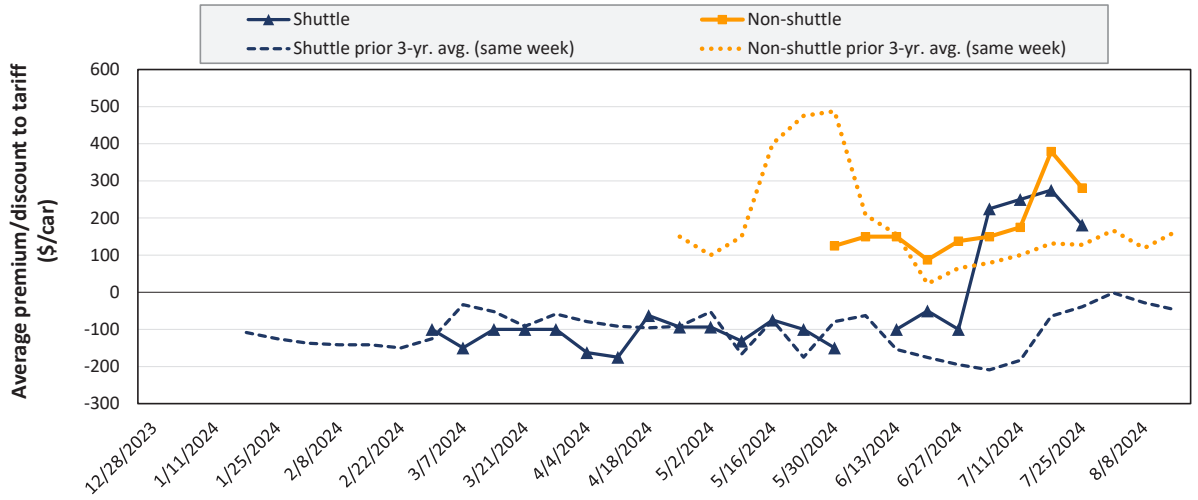


Average monthly system-wide grain shuttle turns reported in the first week of July 2024 were 2.5. By destination region, average monthly grain shuttle turns were 3.47 to PNW, 1.5 to Mexico, 2.6 to the Gulf, and 2.9 to the Southwest.

Note: Data is submitted in the first weekly report of each month, covering the previous month. A "shuttle turn" refers to the number of trips completed per month by a single train. Numbers reflect averages of the three railroads with a shuttle train program: BNSF Railway, Union Pacific Railroad; and CPKC. CPKC only reports values for the Pacific Northwest (PNW). Regions are not standardized and vary across railroads. "Southwest" refers to domestic destinations and includes: "West Texas, Arkansas/Texas, California/Arizona, and California."
Source: Surface Transportation Board.

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., one year). This ordering system is referred to as the "primary market." Once grain shippers acquire guaranteed freight on the primary market, they can trade that freight with other shippers through a broker. These transactions are referred to as the "secondary market." Secondary rail values are indicators of rail service quality and demand/supply. The values published herein are market indicators only and do not represent guaranteed prices.

Figure 5. Secondary market bids/offers for railcars to be delivered in August 2024



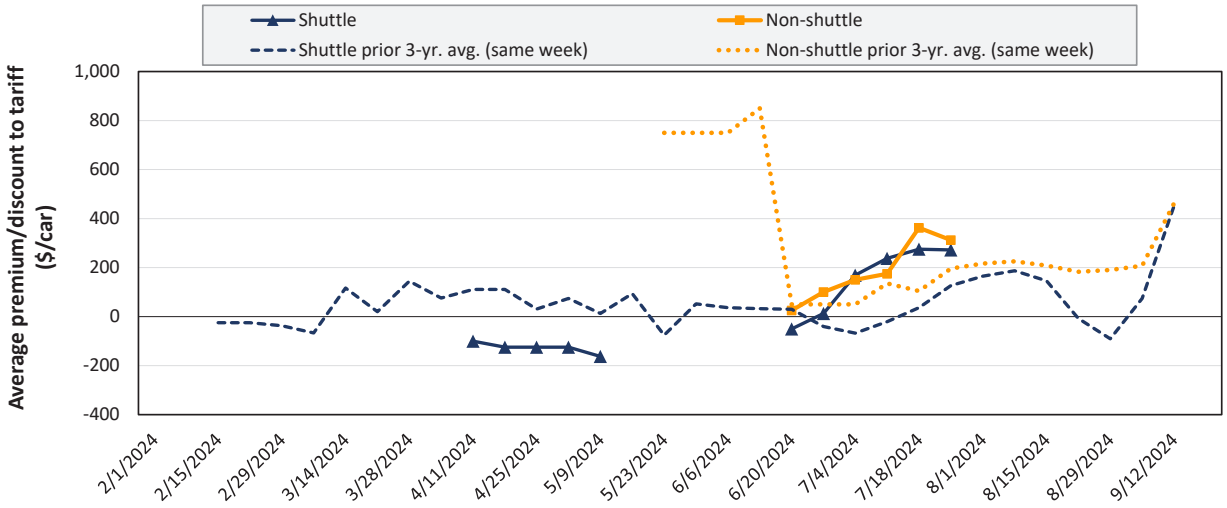
Average non-shuttle bids/offers fell $98 this week, and are $98 below the peak.

Average shuttle bids/offers fell $94 this week and are $94 below the peak.

7/25/2024	BNSF	UP
Non-Shuttle	$213	$350
Shuttle	$388	-$25

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 6. Secondary market bids/offers for railcars to be delivered in September 2024



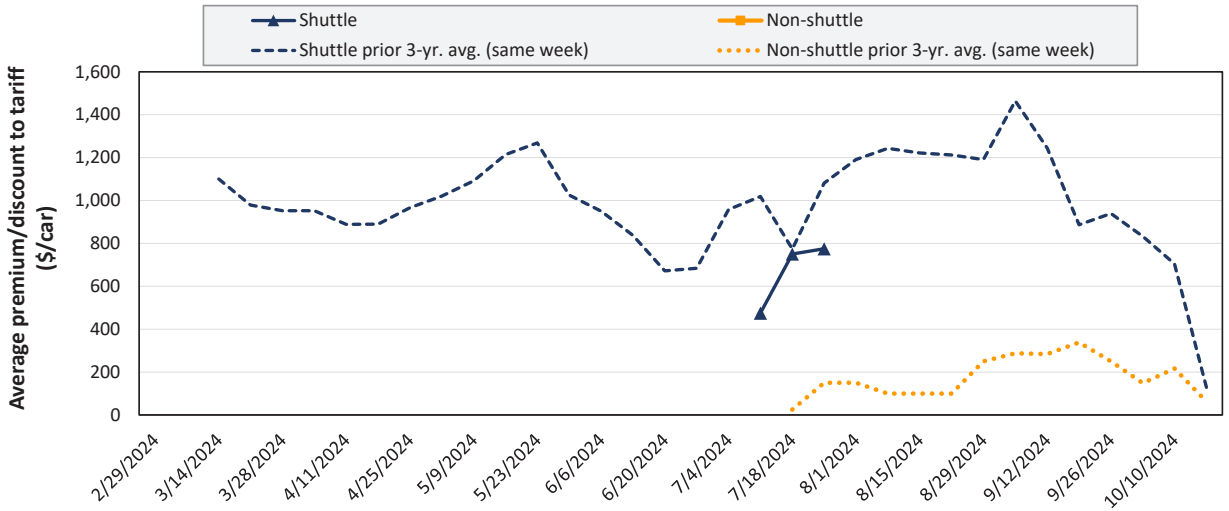
Average non-shuttle bids/offers fell $50 this week, and are $50 below the peak.

Average shuttle bids/offers fell $3 this week and are $3 below the peak.

7/25/2024	BNSF	UP
Non-Shuttle	$250	$375
Shuttle	$469	$75

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 7. Secondary market bids/offers for railcars to be delivered in October 2024



There were no non-shuttle bids/offers this week.

Average shuttle bids/offers rose $25 this week and are at the peak.

7/25/2024	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$1,100	$450

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

Table 5. Weekly secondary railcar market (dollars per car)

For the week ending: 7/25/2024		Delivery period					
		Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24
Non-shuttle	BNSF	250	213	250	n/a	n/a	n/a
	Change from last week	100	30	75	n/a	n/a	n/a
	Change from same week 2023	n/a	88	50	n/a	n/a	n/a
	UP	n/a	350	375	n/a	n/a	n/a
	Change from last week	n/a	-225	-175	n/a	n/a	n/a
	Change from same week 2023	n/a	275	300	n/a	n/a	n/a
Shuttle	BNSF	300	388	469	1,100	n/a	n/a
	Change from last week	-100	-13	69	50	n/a	n/a
	Change from same week 2023	n/a	538	273	75	n/a	n/a
	UP	n/a	-25	75	450	n/a	n/a
	Change from last week	n/a	-175	-75	0	n/a	n/a
	Change from same week 2023	n/a	25	175	-275	n/a	n/a
	CPKC	n/a	200	-100	n/a	n/a	n/a
	Change from last week	n/a	0	0	n/a	n/a	n/a
	Change from same week 2023	n/a	200	-100	n/a	n/a	n/a

Note: Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

The tariff rail rate is the base price of freight rail service. Together with fuel surcharges and any auction and secondary rail values, the tariff rail rate constitutes the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 6. Tariff rail rates for unit train shipments, August 2024

Commodity	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Wichita, KS	St. Louis, MO	$4,991	$167	$51.22	$1.39	21
	Grand Forks, ND	Duluth-Superior, MN	$3,862	$36	$38.71	$1.05	-4
	Wichita, KS	Los Angeles, CA	$7,020	$184	$71.54	$1.95	-5
	Wichita, KS	New Orleans, LA	$4,425	$294	$46.86	$1.28	-8
	Sioux Falls, SD	Galveston-Houston, TX	$6,966	$151	$70.67	$1.92	-2
	Colby, KS	Galveston-Houston, TX	$4,675	$322	$49.62	$1.35	-8
	Amarillo, TX	Los Angeles, CA	$5,585	$448	$59.91	$1.63	8
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$332	$43.02	$1.09	-0
	Toledo, OH	Raleigh, NC	$8,877	$0	$88.15	$2.24	4
	Des Moines, IA	Davenport, IA	$2,830	$70	$28.80	$0.73	6
	Indianapolis, IN	Atlanta, GA	$6,866	$0	$68.18	$1.73	4
	Indianapolis, IN	Knoxville, TN	$5,790	$0	$57.50	$1.46	4
	Des Moines, IA	Little Rock, AR	$4,425	$207	$45.99	$1.17	4
	Des Moines, IA	Los Angeles, CA	$6,305	$602	$68.59	$1.74	2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,156	$472	$36.03	$0.98	-9
	Toledo, OH	Huntsville, AL	$7,269	$0	$72.18	$1.96	3
	Indianapolis, IN	Raleigh, NC	$8,169	$0	$81.12	$2.21	4
	Indianapolis, IN	Huntsville, AL	$5,921	$0	$58.80	$1.60	4
	Champaign-Urbana, IL	New Orleans, LA	$5,040	$332	$53.35	$1.45	3

Note: 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. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 7. Tariff rail rates for shuttle train shipments, August 2024

Commodity	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Great Falls, MT	Portland, OR	$4,343	$106	$44.18	$1.20	-5
	Wichita, KS	Galveston-Houston, TX	$4,411	$82	$44.62	$1.21	-5
	Chicago, IL	Albany, NY	$7,413	$0	$73.61	$2.00	5
	Grand Forks, ND	Portland, OR	$6,001	$182	$61.40	$1.67	-4
	Grand Forks, ND	Galveston-Houston, TX	$5,446	$187	$55.94	$1.52	-2
	Colby, KS	Portland, OR	$5,923	$528	$64.06	$1.74	-0
Corn	Minneapolis, MN	Portland, OR	$5,660	$222	$58.41	$1.48	-1
	Sioux Falls, SD	Tacoma, WA	$5,620	$203	$57.83	$1.47	-1
	Champaign-Urbana, IL	New Orleans, LA	$4,345	$332	$46.44	$1.18	3
	Lincoln, NE	Galveston-Houston, TX	$4,560	$119	$46.46	$1.18	4
	Des Moines, IA	Amarillo, TX	$4,845	$260	$50.69	$1.29	3
	Minneapolis, MN	Tacoma, WA	$5,660	$220	$58.39	$1.48	-1
	Council Bluffs, IA	Stockton, CA	$5,780	$228	$59.66	$1.52	3
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,335	$203	$64.93	$1.77	-1
	Minneapolis, MN	Portland, OR	$6,385	$222	$65.61	$1.79	-1
	Fargo, ND	Tacoma, WA	$6,235	$181	$63.71	$1.73	-1
	Council Bluffs, IA	New Orleans, LA	$5,270	$383	$56.14	$1.53	3
	Toledo, OH	Huntsville, AL	$5,509	$0	$54.71	$1.49	4
	Grand Island, NE	Portland, OR	$5,905	$540	$64.00	$1.74	2

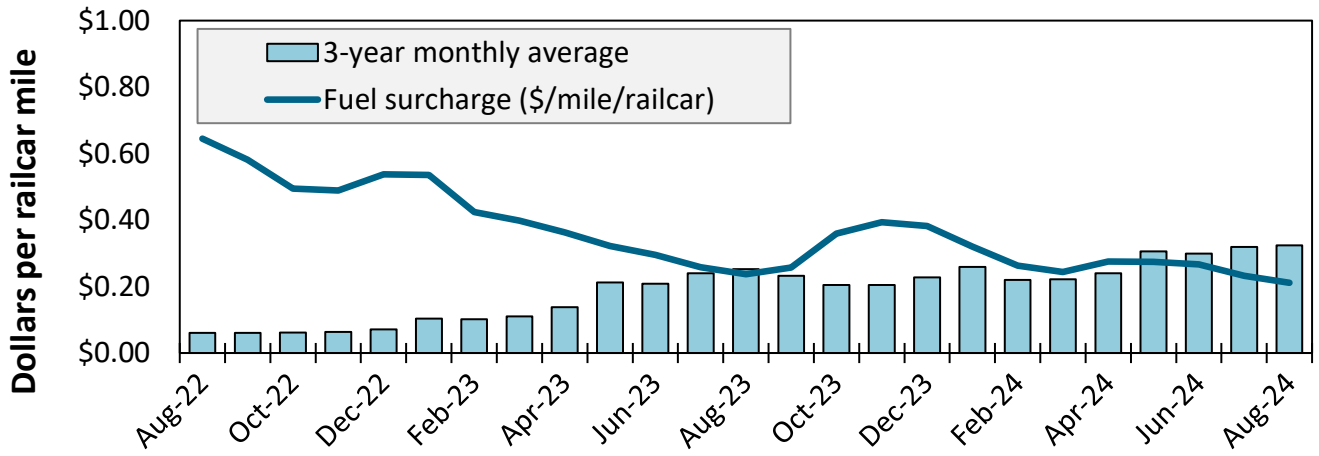
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, August 2024

Commodity	US origin	US border city	US railroad	Train type	US rate plus fuel surcharge per car (USD)	US tariff rate + fuel surcharge per metric ton (USD)	US tariff rate + fuel surcharge per bushel (USD)	Percent M/M	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	$4,414	$43.44	$1.10	-0.9	1.7
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,480	$53.93	$1.37	-0.7	1.5
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	$6,009	$59.14	$1.50	-0.7	3.3
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,386	$53.01	$1.35	-0.7	1.6
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,601	$55.13	$1.40	-0.7	1.5
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$4,826	$47.50	$1.21	-0.5	3.2
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$4,963	$48.85	$1.24	-0.5	3.1
	Superior, NE	El Paso, TX	BNSF	Shuttle	$4,821	$47.45	$1.21	-0.6	1.7
Soybeans	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,480	$53.93	$1.47	-0.7	1.5
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$5,456	$53.70	$1.46	-0.6	3.1
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,371	$62.70	$1.71	-0.4	2.4
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$5,457	$53.71	$1.46	-0.6	3.1
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,386	$53.01	$1.44	-0.7	1.6
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,475	$63.73	$1.73	-0.4	2.4
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$4,017	$39.54	$1.08	-4.9	-8.9
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$3,599	$35.42	$0.96	-4.9	-9.4
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,609	$45.36	$1.23	-0.4	-8.3
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,386	$53.01	$1.44	-0.7	1.6
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,495	$44.24	$1.20	-0.4	-8.5

Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows “Rule 11 rates,” which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments that continue into Mexico, and the total cost of the shipment would include a separate rate obtained from a Mexican railroad. The rates apply to jumbo covered hopper ("C114") cars. The "shuttle" train type applies to qualified shipments (typically, 110 cars) that meet railroad efficiency requirements. The "non-shuttle" train type applies to Kansas City Southern (KCS) (now CPKC) shipments and is made up of 75 cars or more (except the Marshall, MO, rate is for a 50-74 car train). BNSF Railway's destination efficiency trains (DET) are shuttle-length trains (typically 110 cars) that can be split en route for unloading at multiple destinations. Percentage change month to month (M/M) and year to year (Y/Y) are calculated using the tariff rate plus fuel surcharge. For a larger list of to-the-border rates, see AgTransport.
Source: BNSF Railway, Union Pacific Railroad, and CPKC (formerly, Kansas City Southern Railway).

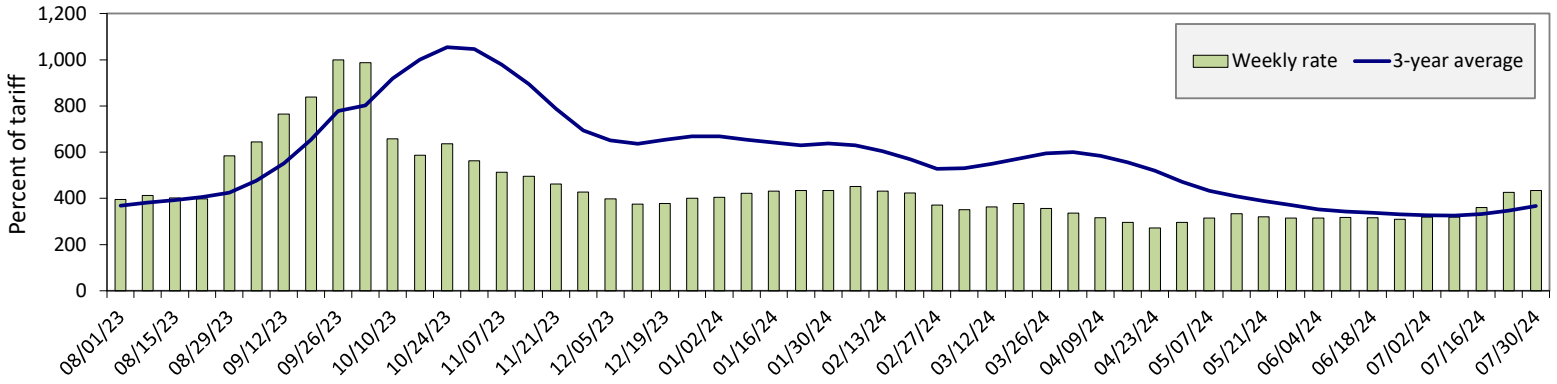
Figure 8. Railroad fuel surcharges, North American weighted average



August 2024: $0.21/mile, down 2 cents from last month’s surcharge of $0.23/mile; down 3 cents from the August 2023 surcharge of $0.24/mile; and down 11 cents from the August prior 3-year average of $0.32/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 9. Illinois River barge freight rate



For the week ending July 30: 2 percent higher than the previous week; 10 percent higher than last year; and 19 percent higher than the 3-year average.

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

Table 9. Weekly barge freight rates: southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate	7/30/2024	551	464	435	314	440	440	255
	7/23/2024	496	430	426	305	386	386	236
$/ton	7/30/2024	34.11	24.68	20.18	12.53	20.64	17.78	8.01
	7/23/2024	30.70	22.88	19.77	12.17	18.10	15.59	7.41
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Lower Illinois River**	**St. Louis**	**Cincinnati**	**Lower Ohio**	**Cairo-Memphis**
Current week % change from the same week	Last year	20	15	10	-11	30	30	-24
	3-year avg.	23	19	19	3	35	35	-12
Rate	August	542	473	450	348	455	455	331
	October	675	636	638	591	632	632	580

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

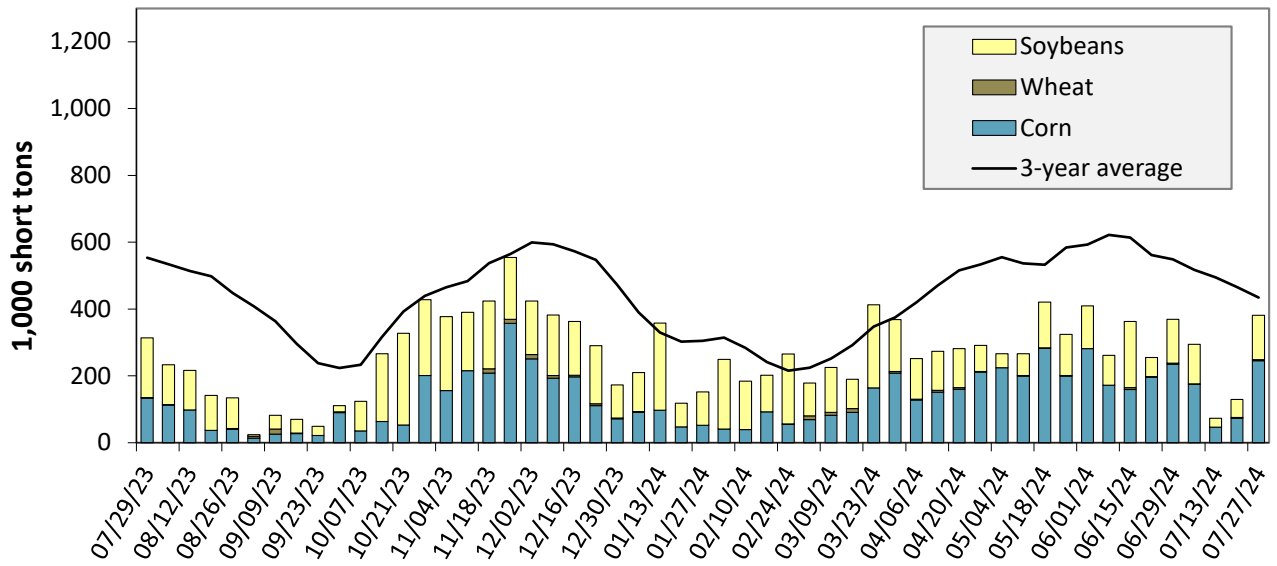
Figure 10. Benchmark tariff rates

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.

Source: USDA, Agricultural Marketing Service.

Figure 11. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending July 27: 21 percent higher than last year and 12 percent lower than the 3-year average.

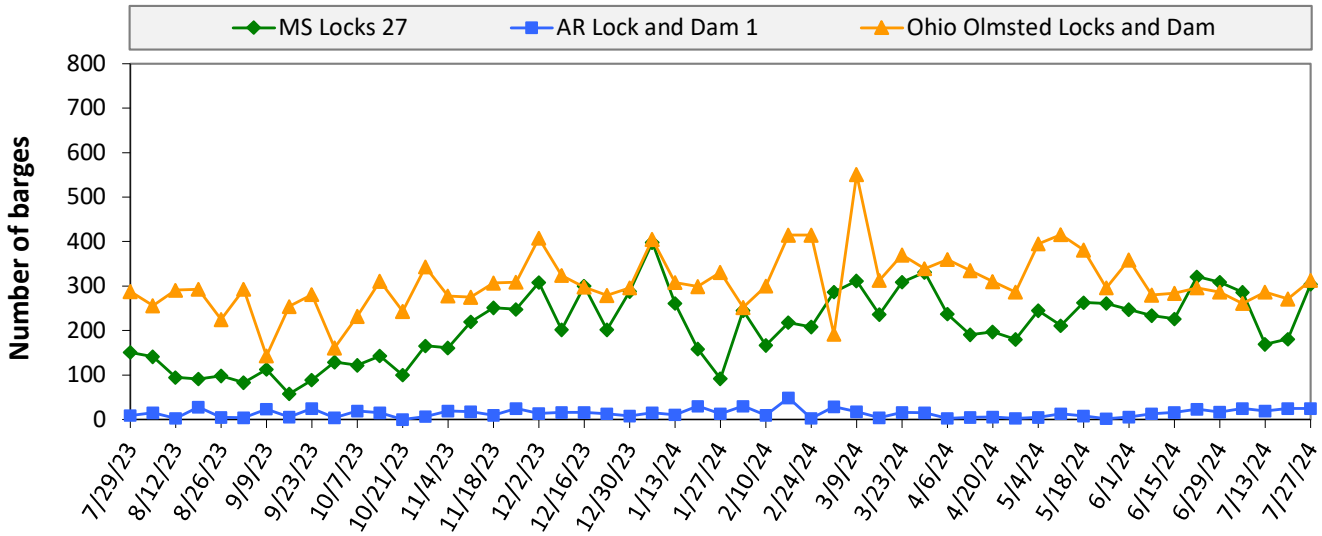
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

Table 10. Barged grain movements (1,000 tons)

For the week ending 07/27/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	67	0	67	0	135
Mississippi River (Winfield, MO (L25))	159	2	129	0	289
Mississippi River (Alton, IL (L26))	224	3	134	0	361
Mississippi River (Granite City, IL (L27))	245	3	133	0	381
Illinois River (La Grange)	101	2	64	0	167
Ohio River (Olmsted)	166	23	63	0	252
Arkansas River (L1)	0	23	3	0	26
Weekly total - 2024	411	49	199	0	659
Weekly total - 2023	169	43	172	19	403
2024 YTD	8,121	986	5,997	145	15,250
2023 YTD	8,201	775	6,382	178	15,536
2024 as % of 2023 YTD	99	127	94	81	98
Last 4 weeks as % of 2023	141	79	62	13	95
Total 2023	12,857	1,346	11,824	267	26,294

Note: “Other” refers to oats, barely, sorghum, and rye. Total may not add up due to rounding. YTD = year to date. Weekly total, YTD, and calendar year total include Mississippi River lock 27, Ohio River Olmsted lock, and Arkansas Lock 1. “L” (as in "L15") refers to a lock, locks, or lock 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.

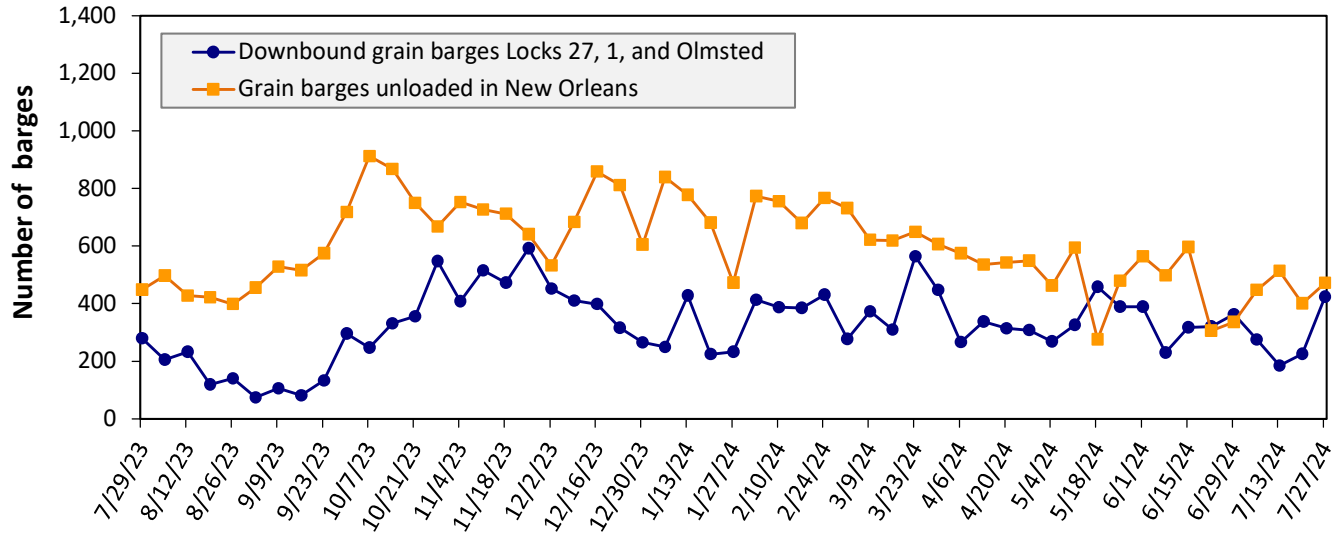
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending July 27: 642 barges transited the locks, 165 barges more than the previous week, and 31 percent higher than the 3-year 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.

Figure 13. Grain barges for export in New Orleans region



For the week ending July 27: 424 barges moved down river, 199 more than the previous week; 472 grain barges unloaded in the New Orleans Region, 18 percent more than the previous week.

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.

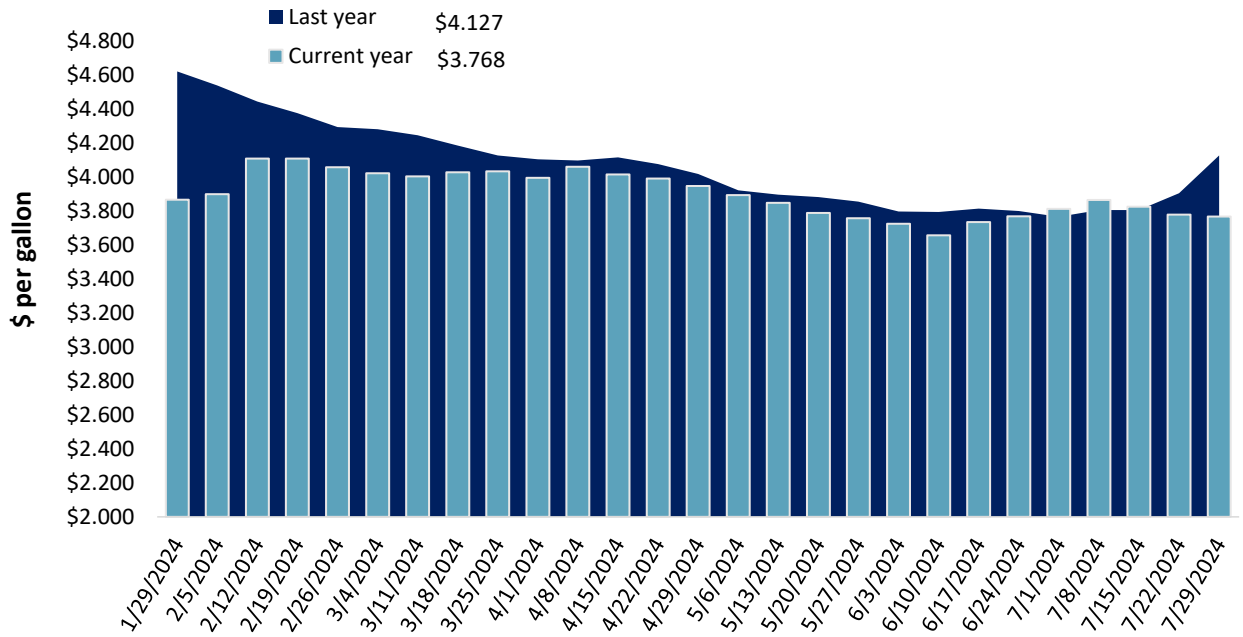
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 7/29/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.844	-0.028	-0.309
	New England	4.089	-0.012	-0.072
	Central Atlantic	4.028	-0.033	-0.263
	Lower Atlantic	3.751	-0.027	-0.350
II	Midwest	3.727	-0.005	-0.378
III	Gulf Coast	3.468	0.007	-0.363
IV	Rocky Mountain	3.718	-0.013	-0.409
V	West Coast	4.370	-0.024	-0.383
	West Coast less California	3.968	-0.009	-0.433
	California	4.831	-0.043	-0.327
Total	United States	3.768	-0.011	-0.359

Note: Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel. 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 14. Weekly diesel fuel prices, U.S. average



For the week ending July 29, the U.S. average diesel fuel price decreased 1.1 cents from the previous week to $3.768 per gallon, 35.9 cents below the same week last year.

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

Table 12. U.S. export balances and cumulative exports (1,000 metric tons)

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 7/18/2024	1,413	800	2,007	1,213	131	5,564	7,670	3,304	16,538
	This week year ago	657	908	1,155	555	71	3,346	3,812	2,605	9,763
	Last 4 wks. as % of same period 2022/23	217	99	171	208	180	167	229	135	183
Current shipped (cumulative) exports sales	2023/24 YTD	594	394	747	722	6	2,463	47,373	42,010	91,846
	2022/23 YTD	426	557	618	458	17	2,076	36,245	50,106	88,427
	YTD 2023/24 as % of 2022/23	139	71	121	158	0	119	131	84	104
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435
	Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622

Note: The marketing year for wheat is Jun. 1 to May 31 and, for corn and soybeans, Sep. 1 to Aug. 31. YTD = year-to-date; wks. = weeks. YTD totals for wheat are for MY 2024/25 and MY 2023/2024, respectively, while YTD totals for corn and soybeans are for MY 2023/24 and 2022/23, respectively.
Source: USDA, Foreign Agricultural Service.

Table 13. Top 5 importers of U.S. corn

For the week ending 7/18/2024	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2024/25	YTD MY 2023/24	YTD MY 2022/23		
Mexico	3,191	22,023	15,214	45	15,445
China	0	2,820	7,581	-63	14,427
Japan	738	10,904	6,688	63	9,283
Colombia	129	6,121	2,305	166	3,592
Korea	1	2,346	821	186	1,938
Top 5 importers	**4,059**	**44,214**	**32,610**	**36**	**44,685**
Total U.S. corn export sales	4,873	55,043	40,057	37	55,397
% of YTD current month's export projection	9%	97%	95%	-	-
Change from prior week	745	331	312	-	-
Top 5 importers' share of U.S. corn export sales	**83%**	**80%**	**81%**	**-**	**81%**
USDA forecast July 2024	**56,518**	**56,518**	**42,217**	**34**	**-**
Corn use for ethanol USDA forecast, July 2024	**138,430**	**138,430**	**131,471**	**5**	**-**

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, "Exports" = carryover plus accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

Table 14. Top 5 importers of U.S. soybeans

For the week ending 7/18/2024	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2024/25	YTD MY 2023/24	YTD MY 2022/23		
China	153	24,416	31,216	-22	32,321
Mexico	378	4,819	4,751	1	4,912
Egypt	0	1,449	1,145	27	2,670
Japan	73	2,136	2,380	-10	2,259
Indonesia	66	2,124	1,675	27	1,973
Top 5 importers	**670**	**34,944**	**41,167**	**-15**	**44,133**
Total U.S. soybean export sales	**2,904**	**45,314**	**52,712**	**-14**	**56,656**
% of YTD current month's export projection	6%	98%	98%	-	-
Change from prior week	830	89	146	-	-
Top 5 importers' share of U.S. soybean export sales	**23%**	**77%**	**78%**	**-**	**78%**
USDA forecast, July 2024	**49,673**	**46,271**	**53,892**	**-14**	**-**

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, "Exports" = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

Table 15. Top 10 importers of all U.S. wheat

For the week ending 07/18/2024	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2024/25	YTD MY 2023/24		
Mexico	1,328	1,020	30	3,298
Philippines	1,055	720	47	2,494
Japan	670	668	0	2,125
China	141	18	672	1,374
Korea	844	405	109	1,274
Taiwan	343	342	0	921
Nigeria	150	128	17	920
Thailand	289	105	175	552
Colombia	126	85	48	522
Vietnam	141	101	40	313
Top 10 importers	**5,086**	**3,592**	**42**	**13,792**
Total U.S. wheat export sales	**8,028**	**5,421**	**48**	**18,323**
% of YTD current month's export projection	36%	28%		-
Change from prior week	309	233	-	-
Top 10 importers' share of U.S. wheat export sales	**63%**	**66%**	**-**	**75%**
USDA forecast, July 2024	**22,453**	**19,241**	**17**	**-**

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, "Exports" = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

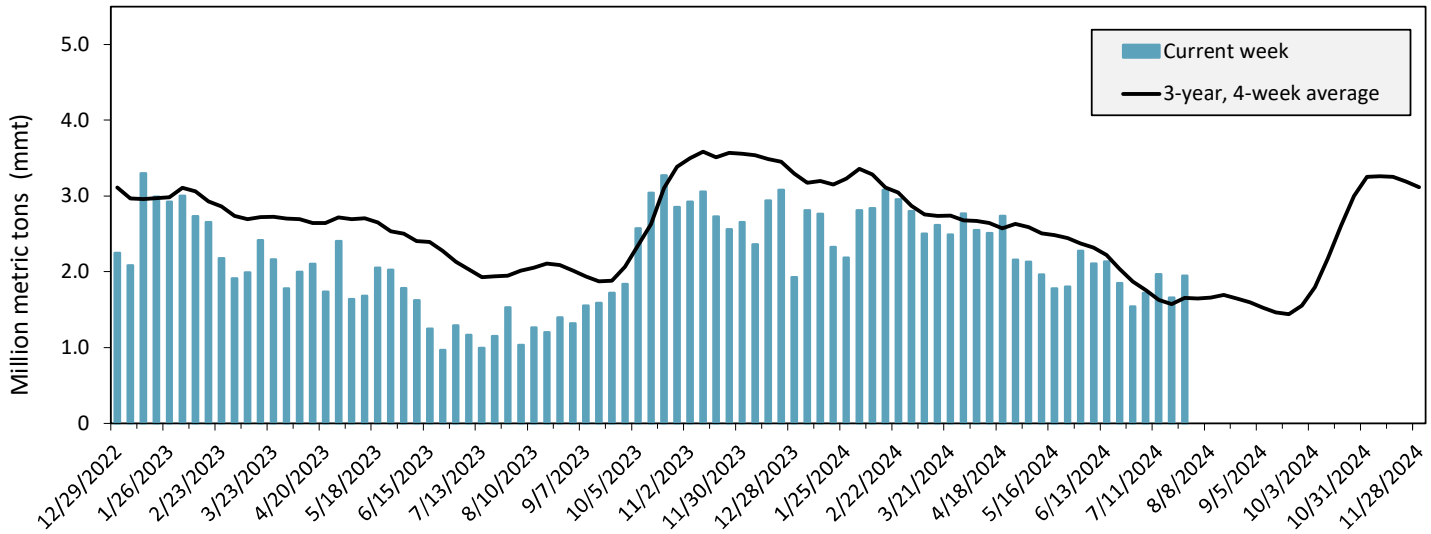
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 07/25/2024	Previous week*	Current week as % of previous	2024 YTD*	2023 YTD*	2024 YTD as % of 2023 YTD	Last 4-weeks as % of:		2023 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	258	469	55	10,895	3,983	274	n/a	171	5,267
	Soybeans	0	0	n/a	2,523	3,356	75	n/a	n/a	10,286
	Wheat	283	69	411	6,181	5,681	109	123	146	9,814
	All Grain	**541**	**538**	**100**	**20,684**	**13,215**	**157**	**285**	**149**	**25,913**
Mississippi Gulf	Corn	526	306	172	15,004	15,295	98	205	102	23,630
	Soybeans	240	192	125	12,100	13,148	92	87	85	26,878
	Wheat	89	36	248	2,966	2,013	147	52	69	3,335
	All Grain	**855**	**534**	**160**	**30,125**	**30,456**	**99**	**124**	**93**	**53,843**
Texas Gulf	Corn	21	8	271	303	147	207	196	80	397
	Soybeans	0	0	n/a	0	49	0	n/a	n/a	267
	Wheat	20	66	30	911	1,252	73	214	73	1,593
	All Grain	**95**	**143**	**67**	**3,314**	**3,084**	**107**	**80**	**76**	**5,971**
Interior	Corn	250	206	121	7,788	5,394	144	141	135	10,474
	Soybeans	163	145	112	4,122	3,237	127	192	169	6,508
	Wheat	36	74	49	1,675	1,302	129	142	89	2,281
	All Grain	**452**	**425**	**106**	**13,716**	**10,003**	**137**	**154**	**134**	**19,467**
Great Lakes	Corn	0	0	n/a	0	23	0	n/a	n/a	57
	Soybeans	0	0	n/a	18	29	62	n/a	n/a	192
	Wheat	0	12	0	199	162	122	158	158	581
	All Grain	**0**	**12**	**0**	**217**	**214**	**101**	**158**	**65**	**831**
Atlantic	Corn	5	3	163	208	79	262	n/a	103	166
	Soybeans	0	1	n/a	438	1,161	38	20	9	2,058
	Wheat	3	6	45	21	69	31	68	50	101
	All Grain	**8**	**9**	**81**	**667**	**1,310**	**51**	**72**	**34**	**2,325**
All regions	Corn	1,059	991	107	34,199	24,932	137	255	122	40,004
	Soybeans	403	338	119	19,254	21,085	91	113	102	46,459
	Wheat	431	263	164	11,952	10,480	114	98	103	17,738
	All Grain	**1,951**	**1,661**	**117**	**68,777**	**58,398**	**118**	**151**	**110**	**108,664**

*Note: Data include revisions from prior weeks; "All grain" includes corn, soybeans, wheat, sorghum, oats, barley, rye, sunflower, flaxseed, and mixed grains; "All regions" includes listed regions and other minor regions not listed; YTD= year-to-date; n/a = not available or no change.
Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of U.S. export grain shipments departed through the U.S. Gulf region in 2019.

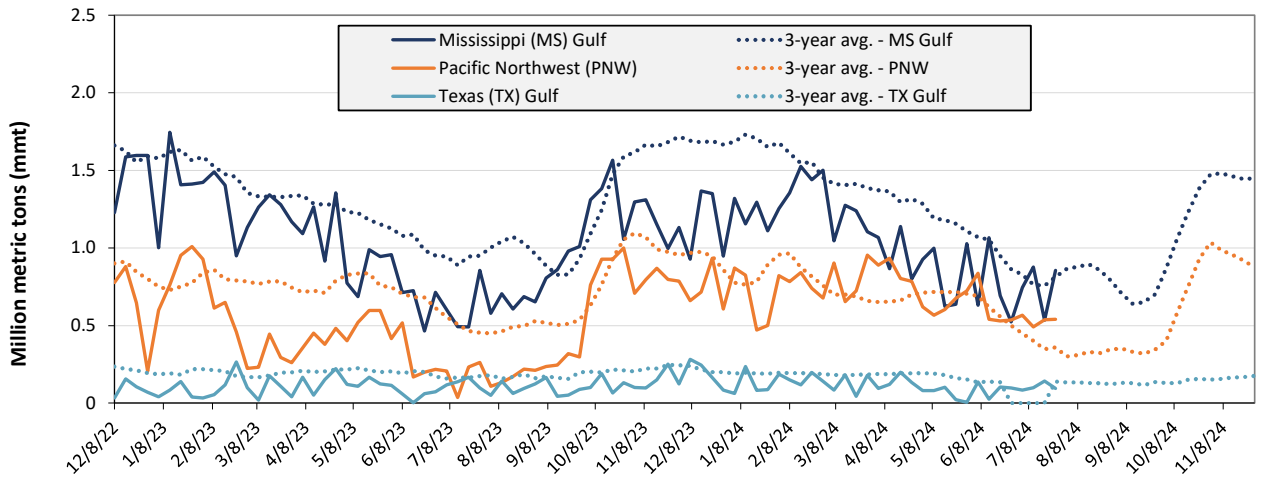
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jul. 25: 2.0 mmt of grain inspected, up 17 percent from the previous week, up 44 percent from the same week last year, and up 18 percent from the 3-year, 4-week average.

Notes: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 16. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 07/25/24 inspections (mmt):
MS Gulf: 0.86
PNW: 0.54
TX Gulf: 0.1

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 60	down 33	up 41	un-changed
Last year (same 7 days)	up 28	down 25	up 20	up 97
3-year average (4-week moving average)	up 5	down 31	un-changed	up 51

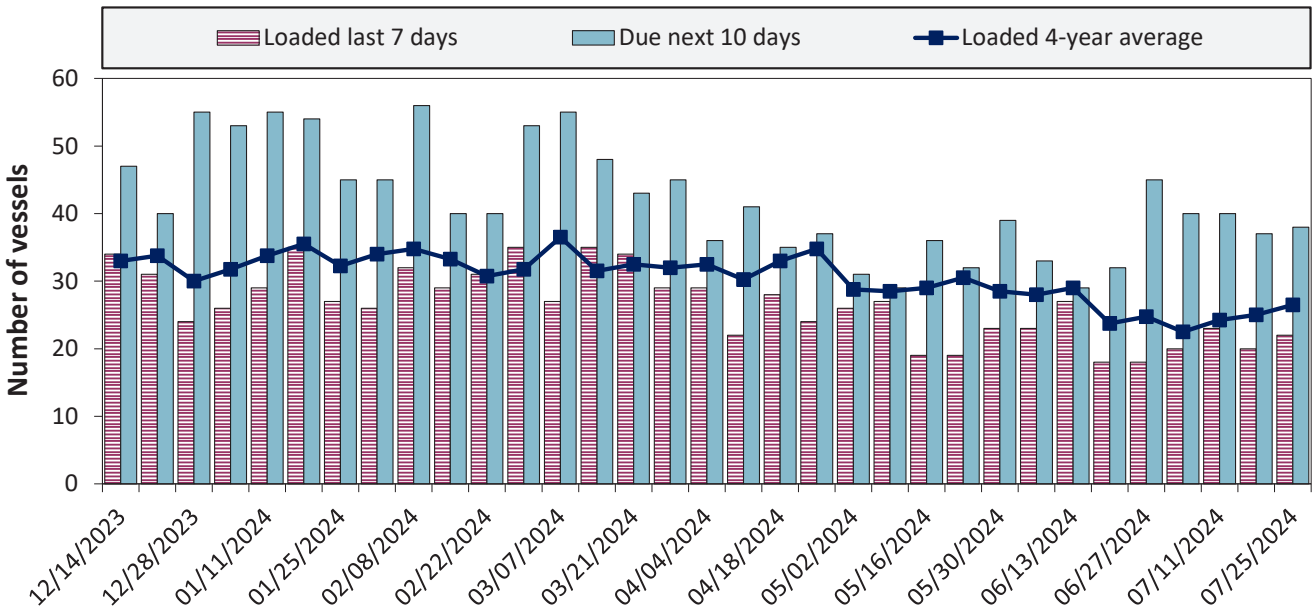
Source: USDA, Federal Grain Inspection Service.

Table 17. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
7/25/2024	21	22	38	10
7/18/2024	14	20	37	14
2023 range	(8…38)	(17…34)	(21…56)	(1…24)
2023 average	22	26	39	10

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

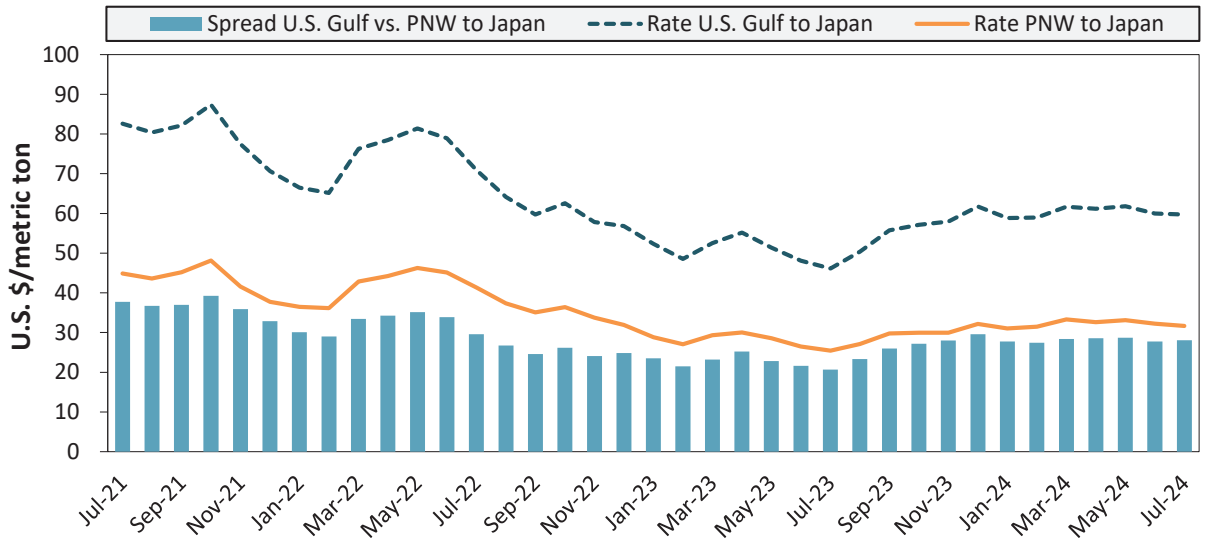
Figure 17. U.S . Gulf vessel loading activity



Week ending 7/25/24, number of vessels	Loaded	Due
Change from last year	10%	46%
Change from 4-year average	-17%	-3%

Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.
Source: USDA, Agricultural Marketing Service.

Figure 18. U.S. Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
July 2024	$60	$32	$28
Change from July 2023	30%	25%	36%
Change from 4-year average	-1%	-5%	4%

Note: PNW = Pacific Northwest.
Source: O'Neil Commodity Consulting.

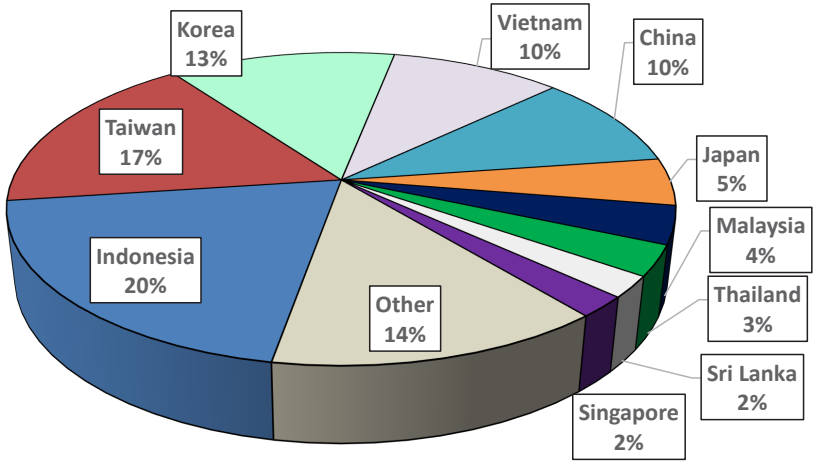
Table 18. Ocean freight rates for selected shipments, week ending 07/27/2024

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Mar 9, 2024	Apr 25/May 4, 2024	54,000	67.00
U.S. Gulf	Japan	Heavy grain	Mar 20, 2024	Apr 1/5, 2024	50,000	69.50
U.S. Gulf	Colombia	Soybean Meal	May 7, 2024	May 20/30, 2024	3,000	28.30
U.S. Gulf	Colombia	Soybean Meal	May 7, 2024	May 20/30, 2024	4,700	30.00
U.S. Gulf	Colombia	Wheat	May 7, 2024	May 20/30, 2024	3,000	28.30
Brazil	N. China	Heavy grain	Jul 11, 2024	Aug 7/13, 2024	63,000	47.25
Brazil	China	Heavy grain	Jul 5, 2024	Aug 4/Sep 14, 2024	63,000	42.50
Brazil	China	Heavy grain	Jun 21, 2024	Jul 20/31, 2024	63,000	42.25
Brazil	China	Heavy grain	May 13, 2024	May 23/29, 2024	60,000	48.75
Brazil	China	Corn	May 10, 2024	Jun 15/Jul 15, 2024	65,000	49.00
Brazil	N. China	Heavy grain	May 3, 2024	May 20/30, 2024	65,000	46.00
Brazil	China	Heavy grain	Apr 19, 2024	May 4/11, 2024	60,000	53.25
Brazil	N. China	Heavy grain	Apr 18, 2024	May 5/15, 2024	63,000	48.50
Brazil	Philippines	Soybean Meal	Feb 23, 2024	Apr 15/25, 2024	40,000	61.00
France	Morocco	Wheat	Feb 6, 2024	Feb 10/14, 2024	30,000	16.10
France	Mauritania	Wheat	Feb 6, 2024	Feb 10/14, 2024	30,000	23.50
Ukraine	S. China	Barley	Jun 25, 2024	Jul 10/30, 2024	60,000	49.00
Ukraine	Indonesia	Heavy grain	Jun 26, 2024	Jul 6/13, 2024	60,000	53.50

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B), except where otherwise indicated. op = option.
Source: Maritime Research, Inc.

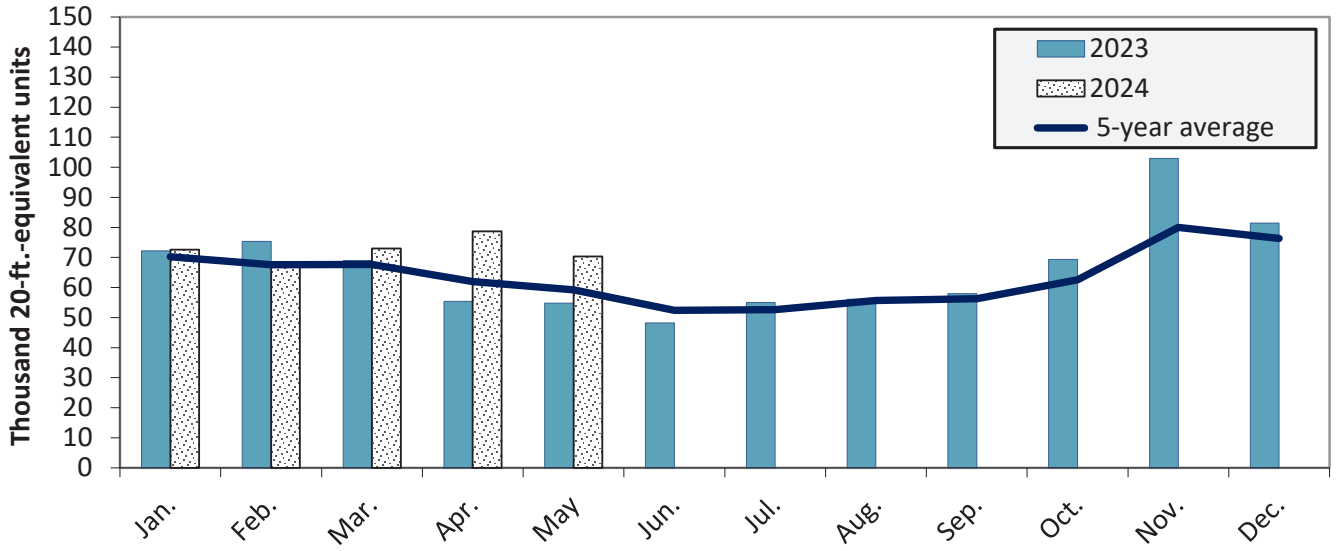
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined for Asia.

Figure 19. Top 10 destination markets for U.S. containerized grain exports, Jan-May 2024



Note: The following harmonized rariff 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 analysis of PIERS data, S&P Global.

Figure 20. Monthly shipments of U.S. containerized grain exports



Containerized grain shipments in May 2024 were up 28.5 percent from last year and up 18.7 percent from the 5-year average.

Note: ft. = foot. 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 analysis of PIERS data, S&P Global.

Title	Name	Email	Phone
Coordinators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Maria Williams	maria.williams@usda.gov	(202) 690-4430
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Grain Transportation Indicators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
Rail Transportation	Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690-1144
	Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690-3244
	Rich Henderson	richard.henderson2@usda.gov	(919) 855-7801
	Austin Hunt	austin.hunt@usda.gov	(540) 681-2596
Barge Transportation	Rich Henderson	richard.henderson2@usda.gov	(919) 855-7801
	Alexis Heyman	alexis.heyman@usda.gov	(847) 699-2414
Truck Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	April Taylor	april.taylor@usda.gov	(202) 720-7880
	Alexis Heyman	alexis.heyman@usda.gov	(847) 699-2414
Grain Exports	Alexis Heyman	alexis.heyman@usda.gov	(847) 699-2414
	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Ocean Transportation	Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	April Taylor (Container movements)	april.taylor@usda.gov	(202) 720-7880
Editor	Maria Williams	maria.williams@usda.gov	(202) 690-4430

Subscription Information: Please sign up to receive regular email announcements of the latest GTR issue by **entering your email address** and selecting your preference to receive Transportation Research and Analysis. For any other information, you may contact us at **GTRContactUs@usda.gov**.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. August 1, 2024.
Web: **http://dx.doi.org/10.9752/TS056.08-01-2024**

Additional Transportation Research and Analysis resources include the ***Grain Truck and Ocean Rate Advisory (GTOR)***, the ***Mexico Transport Cost Indicator Report***, and the ***Brazil Soybean Transportation Report***.

Photo Credit: Adobe Stock (unless otherwise noted on photo)