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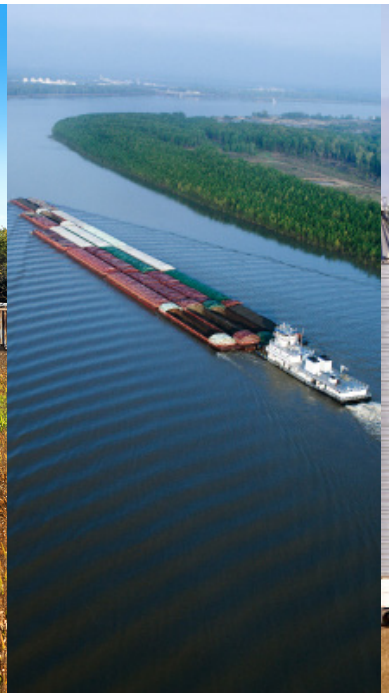
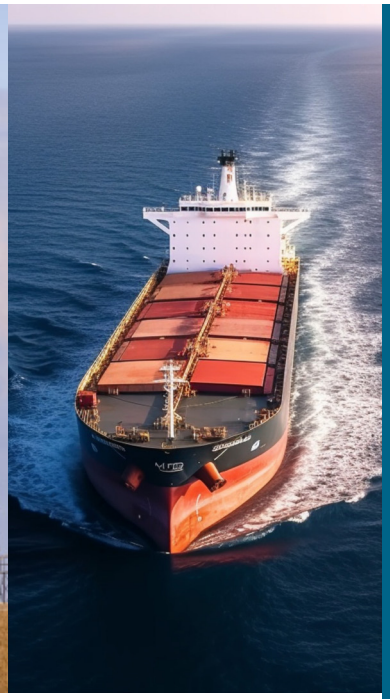
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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Canada's Freight Rail Network Shuts Down. Today, August 22, both major Canadian railroads—Canadian National Railway (CN) and Canadian Pacific Kansas City (CPKC)—initiated lockouts following a months-long dispute with the Teamsters Canada Rail Conference (TCRC), a union of almost 10,000 Canadian railroad workers. TCRC has also withdrawn its services and gone on strike.

This work stoppage does not directly affect CN's and CPKC's U.S. operations, because those workers are covered under different contracts. However, the lockout does impact U.S. grain transportation, because of the high volume of U.S.-Canadian cross-border trade, as well as the interconnectedness of the two countries' rail networks.

For example, Canada is a major supplier of fertilizer for U.S. farmers (e.g., potash, sulfur, anhydrous ammonia, etc.), which mostly ships by rail. Canada is also the leading destination for U.S. ethanol exports, of which nearly 75 percent travels by rail. For additional information on potential impacts of a work stoppage, see *Grain Transportation Report (GTR), May 23, 2024*.

BNSF Halts All Grain Shuttle Trains to Mexico for 1 Month. Effective from August 21 to September 20 (i.e. for 30 days), BNSF Railway (BNSF) will not issue any permits for grain shuttle trains destined to Mexico. This action will halt most BNSF corn and soybean shipments to Mexico, which tend to use shuttle trains. (Other train types carry wheat, so most wheat shippers will still be able to ship to Mexico.)

BNSF said it decided to restrict service in response "to ongoing congestion and service interruptions that have resulted in critical equipment being held in Mexico." BNSF's new restriction comes amid growing concern about Mexican rail service. On July 31, 26 farm and commodity groups expressed concern to Federal officials, warning that Mexican ongoing rail disruptions hindered the delivery of U.S. agricultural products (*GTR, August 8, 2024, first highlight*).

These service issues come amid rising U.S.–Mexico agricultural trade (GTR table 13). For the current marketing year (which ends on August 31), 2.3 million metric tons of unshipped U.S. corn sales are destined to Mexico—80 percent more than this time last year. These remaining sales will need to be shipped either by another railroad (i.e., Union Pacific Railroad or CPKC) or by ocean vessel.

Federal Court Strikes Down STB's Final Offer Rate Review Ruling.

On August 20, the U.S. Court of Appeals for the Eighth Circuit (Eighth Circuit) vacated the Surface Transportation Board's (STB) final rule (from December 2022) establishing Final Offer Rate Review (FORR)—a streamlined approach for resolving smaller rate disputes (worth up to $4 million in relief over 2 years).

For many years, shippers have argued that existing rate review processes are too expensive and lengthy to offer an effective check on unreasonably high rates, especially shippers with smaller cases. There are currently no rate cases before STB, and since STB's inception in 1996, only one rate case has involved grain (*McCarty Farms v. Burlington Northern*).

FORR was designed to streamline the rate review process by having STB choose between one of two "final offers"—one from the shipper and the other from the railroad (*GTR, January 19, 2023*). The Eighth Circuit argued that FORR places STB as a passive arbiter and thus falls short of STB's statutory requirement to "prescribe the maximum rate."

North Carolina and South Carolina Temporarily Waive Trucking Restrictions.

Responding to disruptions caused by Tropical Storm Debby, North Carolina and South Carolina have temporarily waived certain trucking regulations for transporting essential fuels and feed.

On August 5, North Carolina's statewide waiver suspended certain size and weight restrictions and penalties for vehicles used to transport newly harvested crops and feed for livestock and poultry. The suspension is effective for 30 days, unless terminated earlier. On August 4, South Carolina waived the maximum hours of service for 30 days for commercial vehicles transporting fuels, petroleum products, newly harvested crops, and feed for livestock and poultry.

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 August 8, **unshipped balances** of corn and soybeans for marketing year (MY) 2023/24 totaled 7.95 million metric tons (mmt), down 12 percent from last week and up 66 percent from the same time last year. The **unshipped balance** of wheat for MY 2024/25 was 5.01 mmt, down 3 percent from last week and up 39 percent from the same time last year.

Net **corn export sales** for MY 2023/24 were 0.12 mmt, down 75 percent from last week. Net **soybean export sales** were 0.22 mmt, down 32 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.34 mmt, up 24 percent from last week.

Rail

U.S. Class I railroads originated 22,542 **grain carloads** during the week ending August 10. This was a 12-percent increase from the previous week, 24 percent more than last year, and 10 percent more than the 3-year average.

Average August **shuttle secondary railcar bids/offers** (per car) were $38 above tariff for the week ending August 15. This was $144 less than last week. There were no shuttle bids/offers this week last year. Average non-shuttle secondary railcar bids/offers per car were $300 above tariff. This was $100 more than last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending August 17, **barged grain movements** totaled 706,050 tons. This was 11 percent less than the previous week and 273 percent more than the same period last year.

For the week ending August 17, 450 grain barges **moved down river**—51 fewer than last week. There were 412 grain barges **unloaded** in the New Orleans region, 31 percent fewer than last week.

Ocean

For the week ending August 15, 21 **oceangoing grain vessels** were loaded in the Gulf—17 percent more than the same period last year. Within the next 10 days (starting August 16), 44 vessels were expected to be loaded—33 percent more than the same period last year.

As of August 15, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $59.50, 1 percent less than the previous week. The rate from the Pacific Northwest to Japan was $31.00 per mt, 1 percent less than the previous week.

Fuel

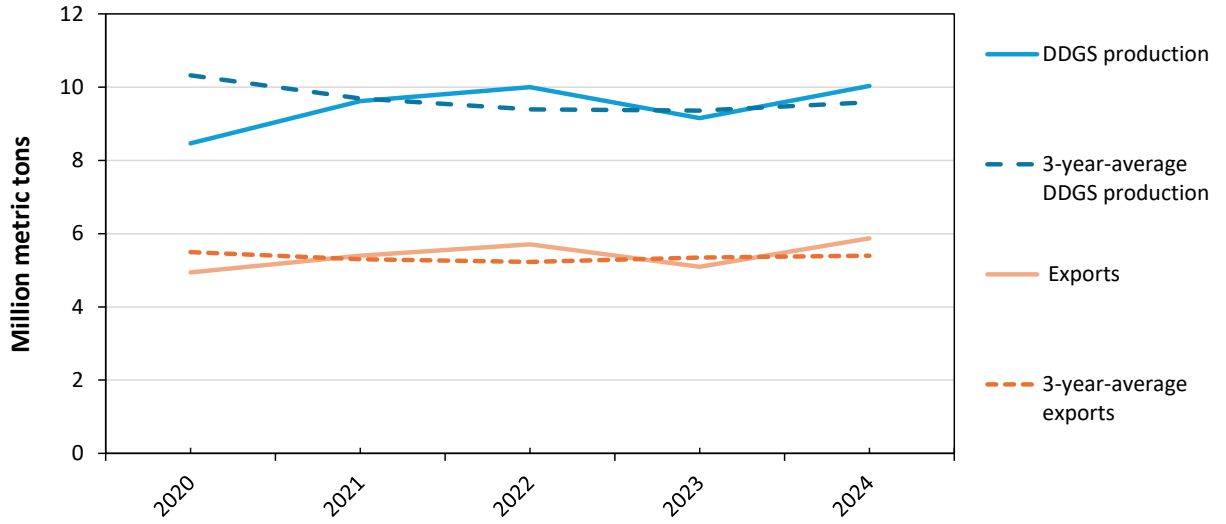
For the week ending August 19, the U.S. average **diesel price** decreased 1.6 cents from the previous week to $3.688 per gallon, 70.1 cents below the same week last year.

Update on Exports and Transportation of DDGS

Distillers' dried grains with solubles (DDGS) exports are a key driver of transportation demand. Year-to-date (YTD) (as of June 30) total DDGS export volumes rose 15 percent from the same period last year, to reach their highest level since 2018. The rise owed to strong ethanol production and robust demand from the top six buyers. YTD *containerized* DDGS exports (as of May 31) were especially strong, up 34 percent over the same period last year.[1] DDGS containerized exports gained market share from bulk grain shipping, which was snarled by logistics turmoil.

This article reviews YTD volumes of DDGS exports, export shares for top buyers and major ports, and market trends for bulk versus container shipping. The metrics and market factors are examined with an eye to their impacts on transportation demand.

Figure 1. U.S. DDGS exports, January to June 2020-24



Source: USDA, Foreign Agricultural Service.

DDGS Production and Exports Rise

In the first half of 2024, as **ethanol production rose**, so, too, did production of ethanol's co-product, DDGS. In the first half of 2024, U.S. DDGS production increased 10 percent from the same time last year and rose 5 percent from the 3-year average. U.S. DDGS exports were also up 15 percent from the same time last year and up 9 percent from the 3-year average. Rising DDGS purchases from the top five importers accounted for the increase (fig. 1).

In the first half of 2024, the top six buyers—Mexico, South Korea, Indonesia, Vietnam, Canada and Turkey—had received 65 percent of total U.S. DDGS exports. Compared to the same period last year, YTD exports of DDGS increased to all top buyers (except Turkey, which had a 10-percent drop). The largest volume increases were to Indonesia (37 percent) and Mexico (26 percent), followed by Korea (18 percent), Vietnam (15 percent), and Canada (6 percent).

Canada has been a perennially strong buyer of U.S. DDGS, although shipments will be temporarily impacted by today's announcement of a rail shutdown in Canada (**see first highlight**). The majority of U.S. DDGS exports to Canada are shipped by rail through the Port of Pembina customs district, ND.

1 For the purposes of this article, "year to date" is through June 30, 2024, for *total* DDGS exports and through May 31, 2024, for *containerized* exports.

Although China's purchases of U.S. DDGS were not strong enough to rank among the top buyers, that country's purchases also rose substantially. Last year, China renewed anti-dumping and countervailing duties on U.S. DDGS for another 5 years.[2] Yet, despite that decision, YTD China's purchases of U.S. DDGS were up 33 percent from the same period last year, marking their highest level since 2021. Those purchases accounted for 3 percent of total YTD exports of U.S. DDGS. Feed **industry sources in China** say they prefer U.S. DDGS for their superior quality and high protein content, as well as competitive prices.

Port Shares of DDGS Exports

In the first half of 2024, 64 percent of all U.S. DDGS exports left through four customs districts: by ocean vessel, 25 percent left from New Orleans, LA, and 22 percent, from Los Angeles, CA. Mostly by rail, 10 percent left from El, Paso, TX, and 7 percent, from Laredo, TX. From the Port of Los Angeles, DDGS exports to Korea, Vietnam, and Indonesia accounted for 70 percent of DDGS activity. From the New Orleans region, exports to Colombia, Turkey, Mexico, and Ireland composed 48 percent of DDGS port activity. From Laredo and El Paso, exports to Mexico accounted for all DDGS activity.

Containerized DDGS Export Volumes

DDGS made up 32 percent of the YTD U.S. containerized-grain-export market—the second-largest share (after soybeans). YTD containerized DDGS exports were up 34 percent from the same period last year and up 36 percent from the 3-year average. These rises were due to increased containerized exports to Vietnam, Indonesia, Korea, and Taiwan. Together, these four countries together accounted for 69 percent of total U.S. containerized DDGS exports in the first half of 2022. From January to May 2024, China's purchases of U.S. containerized DDGS increased for the first time since 2021. Accounting for 4 percent of U.S. containerized DDGS exports, China's YTD purchases were up 69 percent from the same period last year and up 7 percent from the 3-year average.

YTD, as the top U.S. ports of exit, Los Angeles handled 30 percent of all containerized DDGS exports, and Long Beach, CA, handled 23 percent—up 6 percentage points and 2 percentage points, respectively, from the same period last year. With the third-highest share, Norfolk, VA, handled 16 percent—down 4 percentage points from last year.

Bulk vs. Containerized Market Shares

Exports of DDGS can shift fairly easily between bulk and containerized ocean shipping.[3] However, since mid-2023, bulk grain exports have faced substantial logistical challenges: from the Panama Canal's transit restrictions (because of drought)—to costly diversions through the Red Sea (further complicated by attacks from Houthi militants)—to even costlier diversions, in terms of ton-miles, around the Cape of Good Hope (Africa's southern tip) (***Grain Transportation Report (GTR), August 15, 2024***).

Containerized DDGS trade has more gateway options than bulk trade. For example, more than 50 percent of U.S.-to-Asia containerized shipments of DDGS depart from West Coast ports, with routes that completely avoid the Red Sea conflict and the Panama Canal. However, almost 40 percent of DDGS trade travels through the East Coast ports, and some of that trade passes through the Panama Canal. Even during the worst of the Panamanian drought, container vessels were better able than bulk vessels to afford the Canal's high tolls and provide more precise arrival times.

2 On January 11, 2023, China's Ministry of Commerce announced its decision to renew the countervailing (CVD) and antidumping (AD) duty measures on the import of DDGS from the United States. As a result, from January 12, 2023, the General Administration of Customs of China (GACC) continues collecting duties on DDGS imports from the United States until 2028. The AD rates range from 42.2 to 53.7 percent. The CVD rates range from 11.2 percent to 12.0 percent.

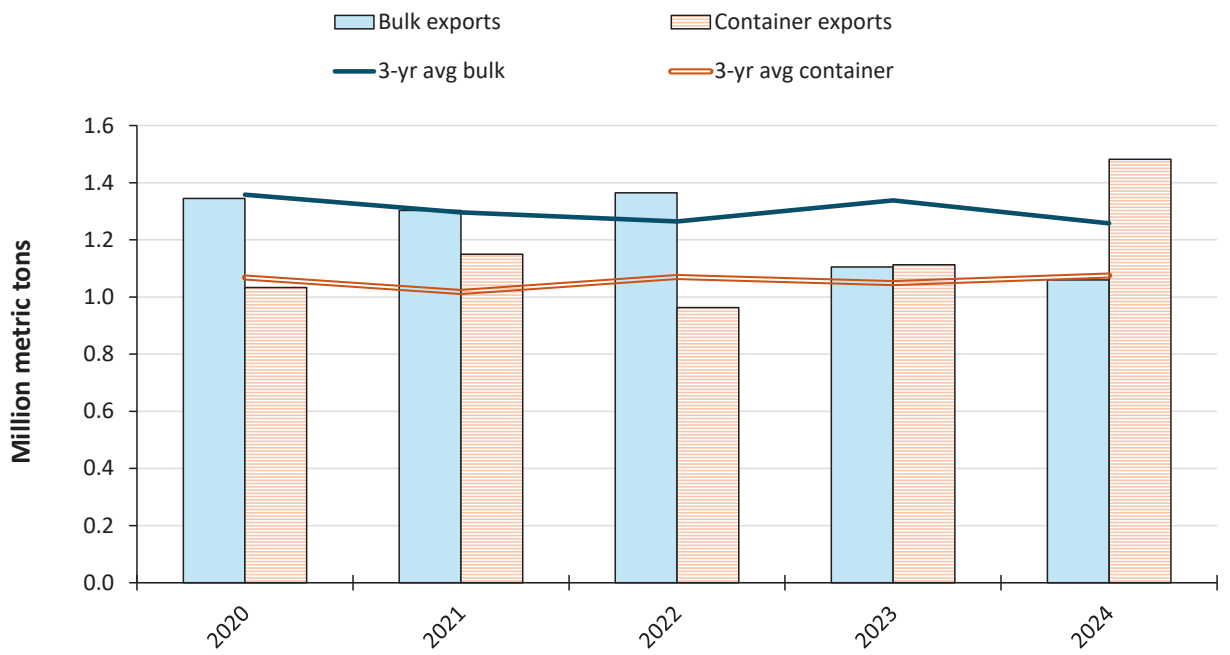
3 Several factors—such as container availability, freight rates, and shipment volume—determine the economic viability of bulk versus container shipping. The growth in DDGS exports and changes in destination markets may also require the market to shift between bulk and containerized shipments. For example, some emerging destinations require mostly bulk shipments of DDGS, whereas others can accept only containers.

Year to date, of total U.S. waterborne DDGS exports, the bulk trade had 42 percent, while containers had 58 percent. In comparison, for the same period last year, each sector had 50 percent (fig 2).[4]

These market shifts were reflected in ocean rates for bulk versus container freight. In the first half of 2024, for a 40-foot container from the U.S. West Coast to Shanghai, China, container shipping rates averaged $792.67—down 34 percent from the prior year and down 29 percent from the 5-year average. In contrast, coinciding with the Panamanian drought and vessel diversions, ocean bulk-freight rates rose over the same period (GTR, July 11, 2024). In the first half of 2024, freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged $60.41 per metric ton—up 17 percent from last year and up 13 percent from the prior 5-year average.

Despite rising bulk rates in the U.S. Gulf over the first half of 2024, the Panama Canal's August 5 increase in its total allowable daily transits (to 35 vessels per day) may put downward pressure on bulk rates in the U.S Gulf. Improving Canal conditions will likely help to grow the bulk DDGS export share.

Figure 2. Exports of bulk and containerized DDGS, January to May 2020-24



Source: IHS Markit/PIERS.

Conclusion

Year to date, demand for U.S. DDGS exports and transportation was largely driven by the top six importers—Mexico, South Korea, Indonesia, Vietnam, Canada, and Turkey. As always, future demand for transporting DDGS will be determined by U.S. ethanol production and demand for U.S. DDGS from key buyers. In the near-to-mid term, other effects will depend on how the Canadian rail labor dispute unfolds and how long the Red Sea conflict continues.

Kranti.Mulik@usda.gov

4 These statistics are based on PIERS/IHS Markit data, which do not include cross-border movements.

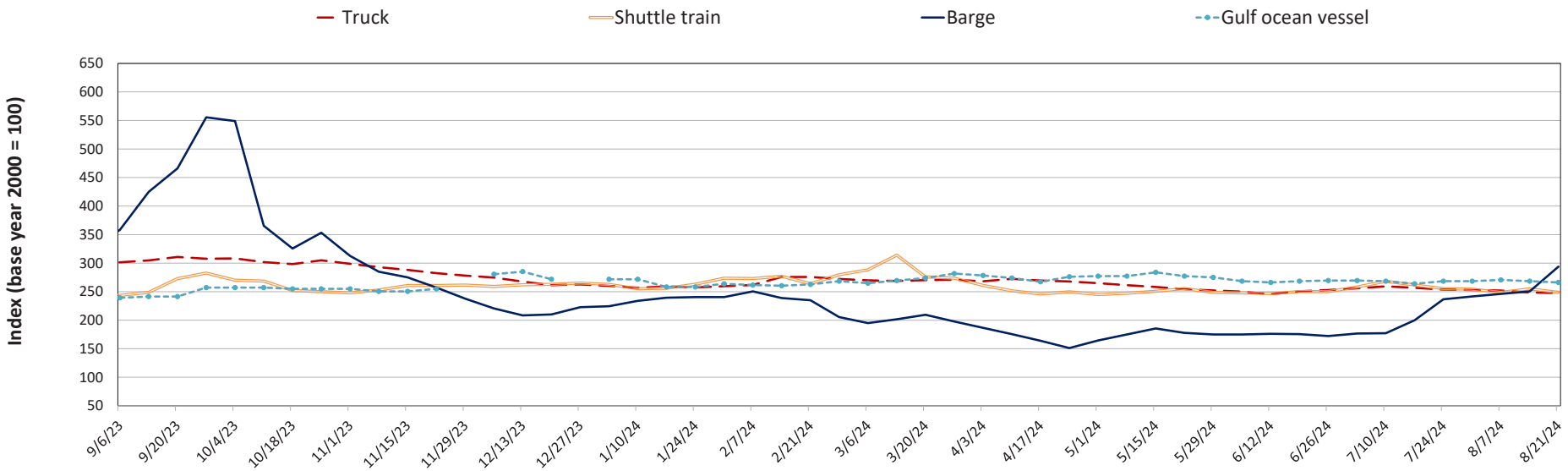
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
08/21/24	248	335	249	294	266	220
08/14/24	249	329	255	251	268	222
08/23/23	295	322	242	221	233	195

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.

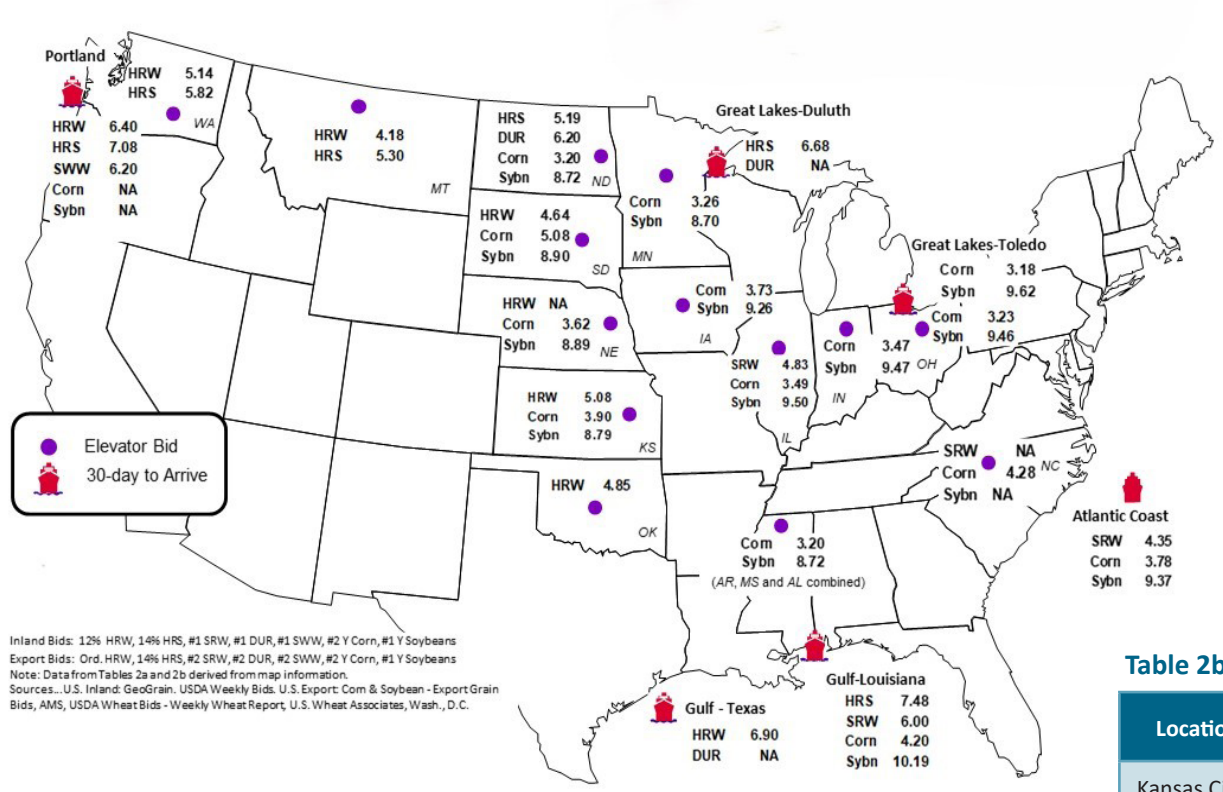
Figure 1. Grain transportation cost indicators as of week ending 08/21/24



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	8/16/2024	8/9/2024
Corn	IL–Gulf	-0.71	-0.74
Corn	NE–Gulf	-0.58	-0.67
Soybean	IA–Gulf	-0.93	-1.10
HRW	KS–Gulf	-1.82	-2.12
HRS	ND–Portland	-1.89	-2.92

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	8/16/2024	Week ago 8/9/2024	Year ago 8/18/2023
Kansas City	Wheat	Sep	5.540	5.422	7.552
Minneapolis	Wheat	Sep	5.932	5.896	8.124
Chicago	Wheat	Sep	5.494	5.304	6.352
Chicago	Corn	Sep	3.966	3.940	4.960
Chicago	Soybean	Sep	9.692	9.972	13.764

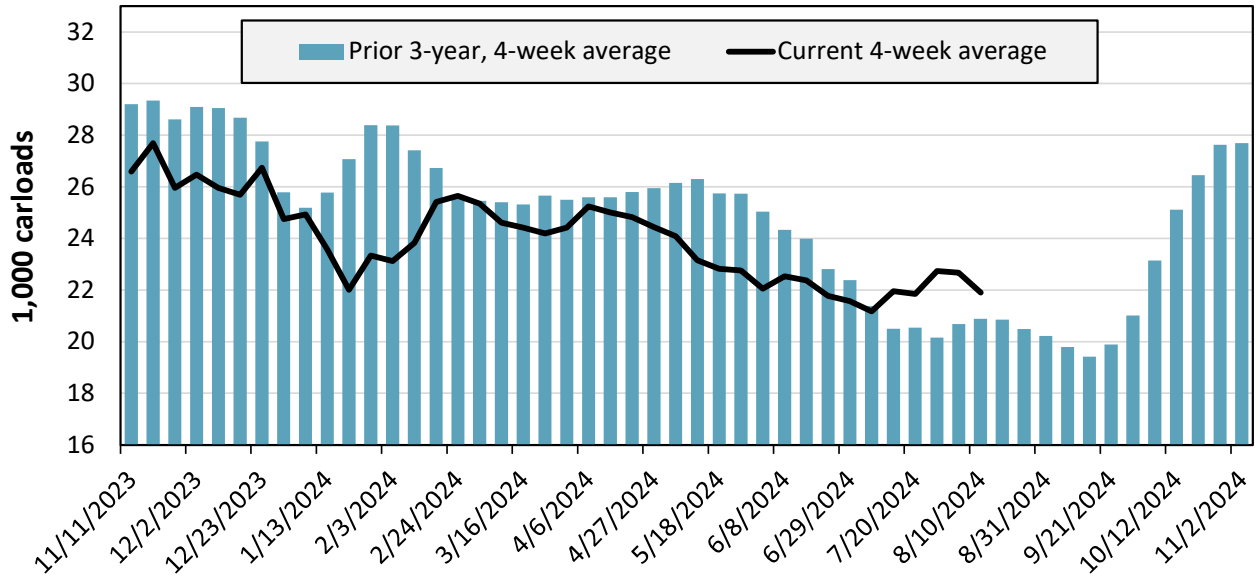
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/10/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,357	2,768	9,531	4,746	3,147	993	22,542
This week last year	1,484	2,202	6,887	3,960	2,775	800	18,108
2024 YTD	52,829	85,144	330,963	162,749	86,792	29,664	748,141
2023 YTD	57,682	85,406	278,670	168,043	71,911	41,646	703,358
2024 YTD as % of 2023 YTD	92	100	119	97	121	71	106
Last 4 weeks as % of 2023	130	115	135	103	125	98	121
Last 4 weeks as % of 3-yr. avg.	112	108	109	89	124	96	105
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 August 10, grain carloads were down 3 percent from the previous week, up 21 percent from last year, and up 5 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: 8/10/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	23.6	18.2	23.1	21.0	8.9	21.9	45.5	23.2
	Average over last 4 weeks	23.6	28.2	28.9	17.5	9.2	26.9	38.1	24.6
	Average of same 4 weeks last year	47.3	33.5	15.5	15.3	7.3	17.9	13.8	21.5
Grain unit train speeds (miles per hour)	This week	23.1	20.1	23.7	21.6	25.8	20.1	24.3	22.7
	Average over last 4 weeks	23.2	20.5	23.9	22.2	25.4	19.3	24.5	22.7
	Average of same 4 weeks last year	23.5	16.3	24.8	22.5	25.8	21.0	25.6	22.8

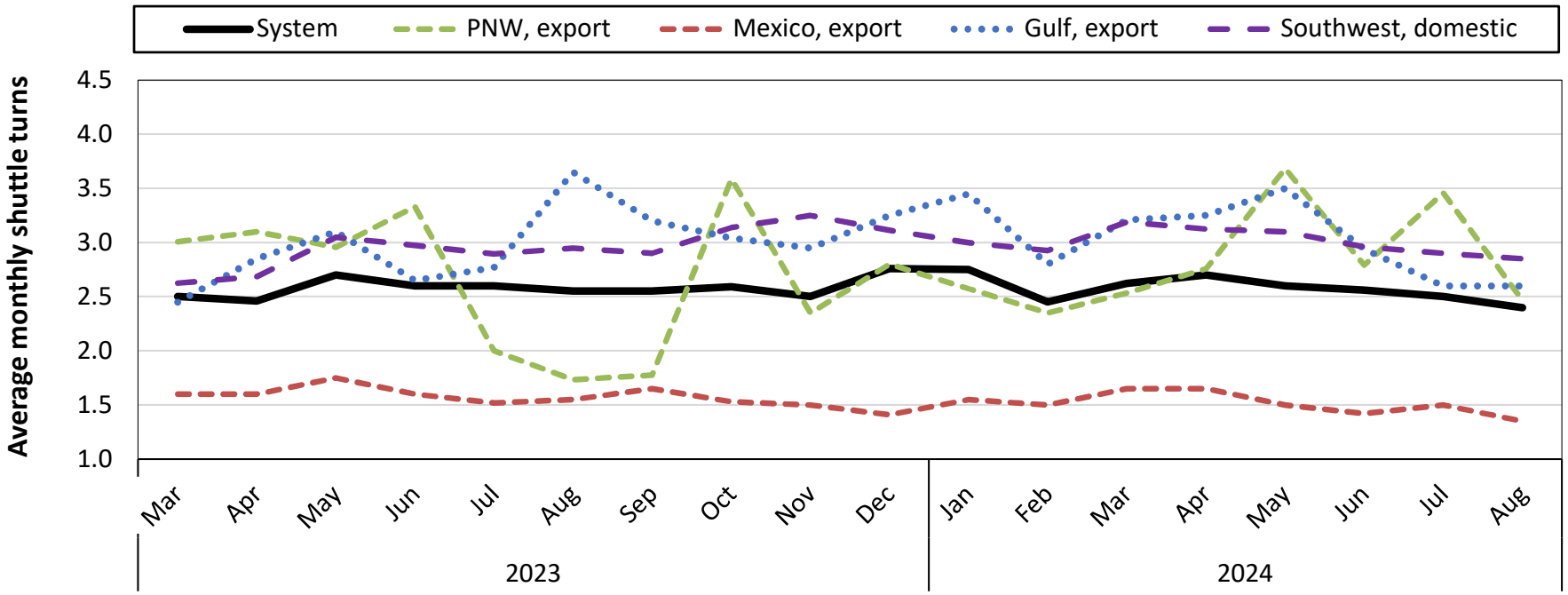
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics 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: 8/10/2024		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	26	3	523	109	6	48	124	840
	Average over last 4 weeks	17	7	521	101	4	45	53	747
	Average of same 4 weeks last year	34	10	519	84	7	57	30	740
Loaded grain cars not moved in over 48 hours (number)	This week	17	93	701	111	3	281	14	1,219
	Average over last 4 weeks	19	160	744	86	5	180	41	1,235
	Average of same 4 weeks last year	36	308	377	67	11	95	51	944
Grain unit trains held (number)	This week	0	0	21	6	0	7	5	40
	Average over last 4 weeks	0	0	25	6	0	5	6	42
	Average of same 4 weeks last year	0	5	8	8	0	1	4	25
Unfilled grain car orders (number)	This week	30	0	1,178	206	0	268	0	1,682
	Average over last 4 weeks	8	0	1,223	249	1	254	26	1,762
	Average of same 4 weeks last year	4	53	261	75	0	88	44	524

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

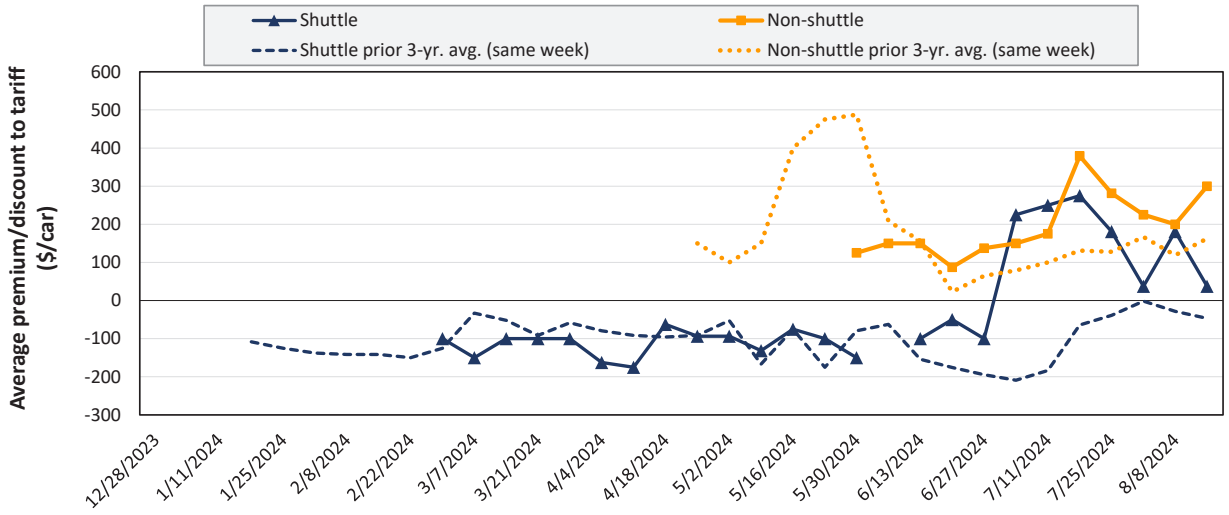


Average monthly system-wide grain shuttle turns reported in the first week of August 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.47 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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



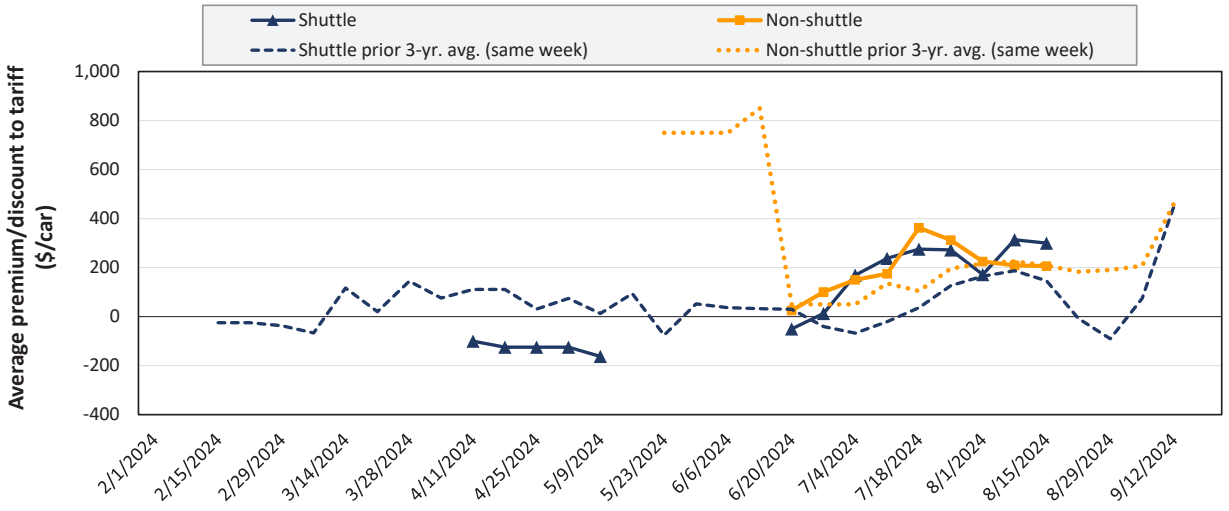
Average non-shuttle bids/offers rose $100 this week, and are $79 below the peak.

Average shuttle bids/offers fell $144 this week and are $238 below the peak.

8/15/2024	BNSF	UP
Non-Shuttle	$300	n/a
Shuttle	-$25	$100

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



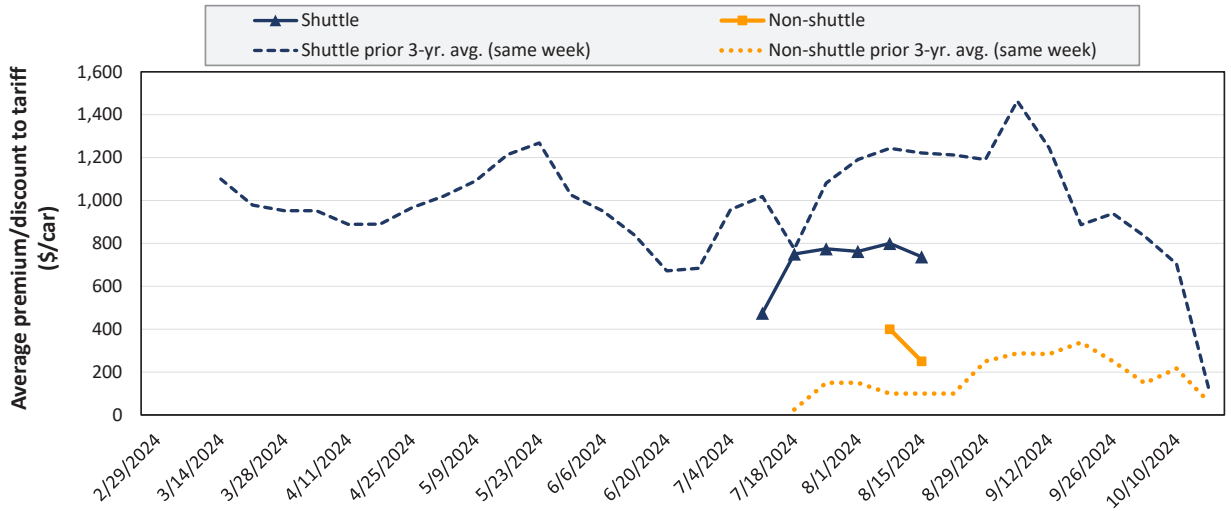
Average non-shuttle bids/offers fell $3 this week, and are $156 below the peak.

Average shuttle bids/offers fell $14 this week and are $14 below the peak.

8/15/2024	BNSF	UP
Non-Shuttle	$350	$63
Shuttle	$325	$275

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



Average non-shuttle bids/offers fell $150 this week, and are $150 below the peak.

Average shuttle bids/offers fell $63 this week and are $63 below the peak.

8/15/2024	BNSF	UP
Non-Shuttle	$250	n/a
Shuttle	$900	$575

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: 8/15/2024		Delivery period					
		Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25
Non-shuttle	BNSF	300	350	250	n/a	n/a	n/a
	Change from last week	100	50	-150	n/a	n/a	n/a
	Change from same week 2023	n/a	238	n/a	n/a	n/a	n/a
	UP	n/a	63	n/a	n/a	n/a	n/a
	Change from last week	n/a	-57	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	-150	n/a	n/a	n/a	n/a
Shuttle	BNSF	-25	325	900	n/a	575	n/a
	Change from last week	-313	-96	-150	n/a	50	n/a
	Change from same week 2023	n/a	313	116	n/a	225	n/a
	UP	100	275	575	n/a	n/a	n/a
	Change from last week	25	69	25	n/a	n/a	n/a
	Change from same week 2023	n/a	488	-925	n/a	n/a	n/a
	CPKC	0	0	n/a	n/a	n/a	n/a
	Change from last week	n/a	100	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	n/a	n/a	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

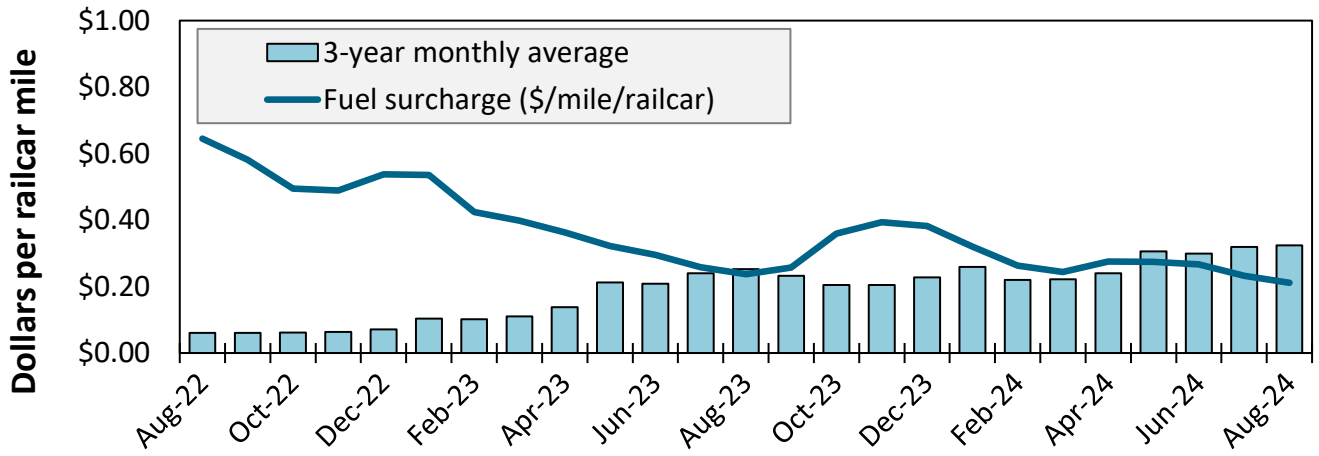
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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).

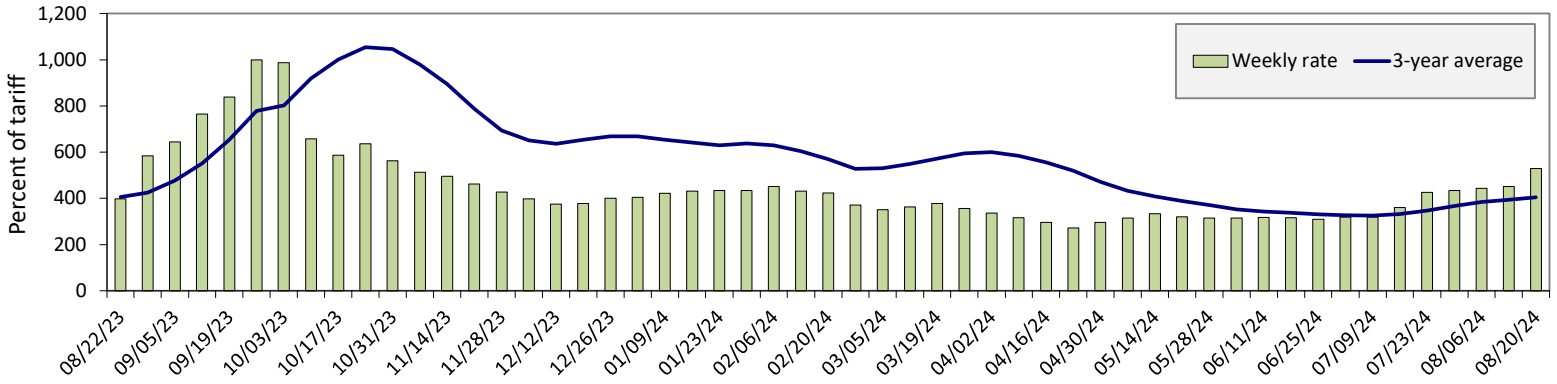
Figure 8. Railroad fuel surcharges, North American weighted average



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 August 20: 17 percent higher than the previous week; 33 percent higher than last year; and 31 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	8/20/2024	598	539	529	529	530	530	643
	8/13/2024	555	483	451	377	445	445	357
$/ton	8/20/2024	37.02	28.67	24.55	21.11	24.86	21.41	20.19
	8/13/2024	34.35	25.70	20.93	15.04	20.87	17.98	11.21
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	26	30	33	35	30	30	55
	3-year avg.	22	27	31	54	41	41	86
Rate	September	685	705	700	710	708	708	827
	November	621	592	580	517	579	579	488

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.

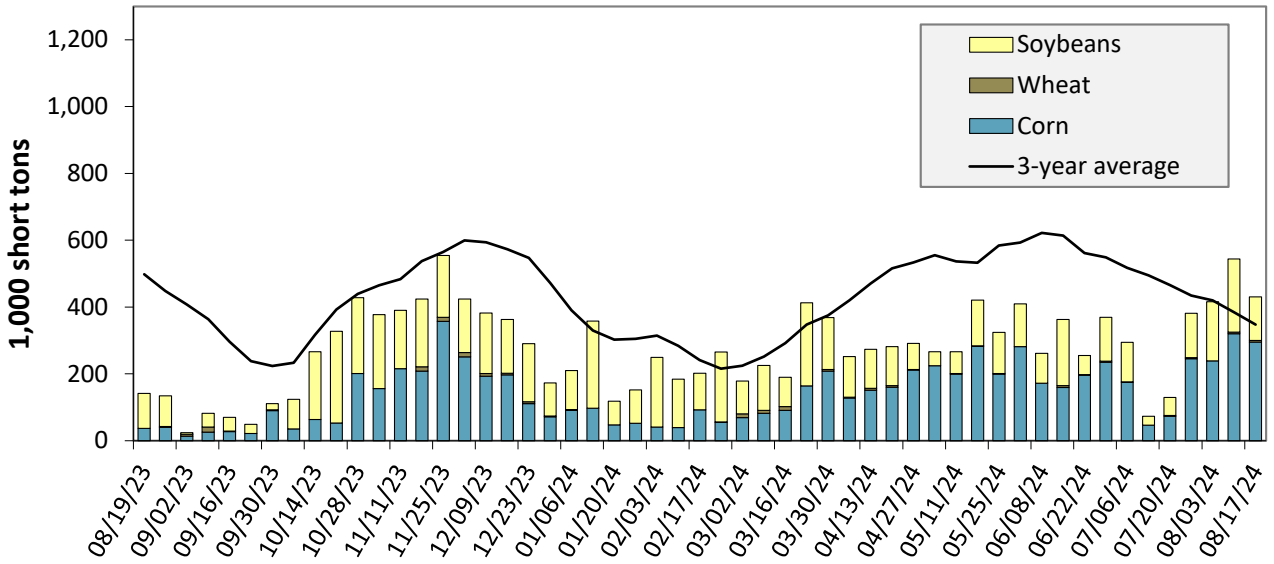
Figure 10. Benchmark tariff rates

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 August 17: 205 percent higher than last year and 24 percent higher than the 3-year average.

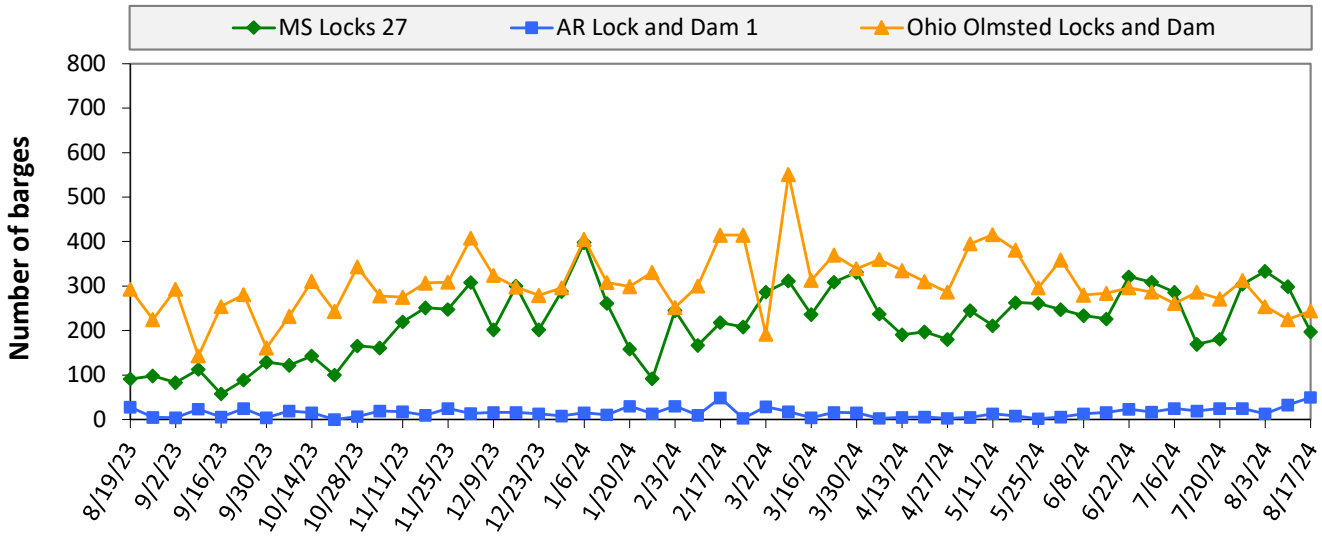
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/17/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	36	0	33	0	69
Mississippi River (Winfield, MO (L25))	169	3	79	0	251
Mississippi River (Alton, IL (L26))	261	5	106	2	373
Mississippi River (Granite City, IL (L27))	295	5	130	2	431
Illinois River (La Grange)	151	0	17	2	170
Ohio River (Olmsted)	192	18	27	5	242
Arkansas River (L1)	3	26	4	0	33
Weekly total - 2024	491	48	161	7	706
Weekly total - 2023	42	23	116	9	189
2024 YTD	9,410	1,137	6,658	164	17,369
2023 YTD	8,715	950	6,995	200	16,861
2024 as % of 2023 YTD	108	120	95	82	103
Last 4 weeks as % of 2023	331	114	140	88	210
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.

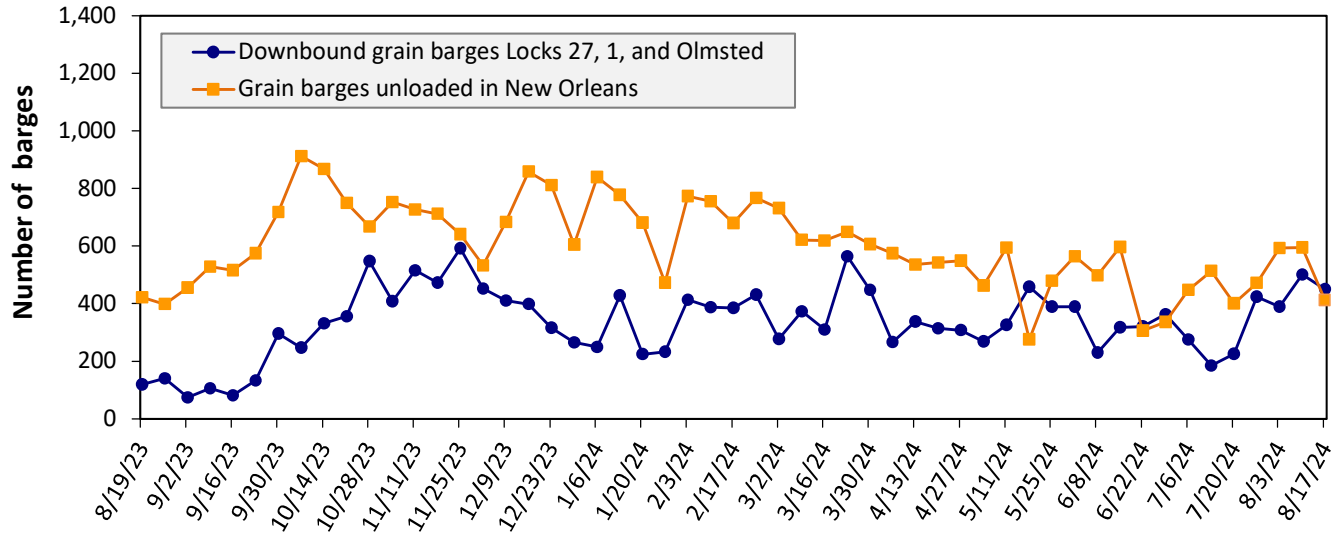
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 17: 491 barges transited the locks, 66 barges fewer than the previous week, and 22 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 August 17: 450 barges moved down river, 51 fewer than the previous week; 412 grain barges unloaded in the New Orleans Region, 31 percent fewer 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.

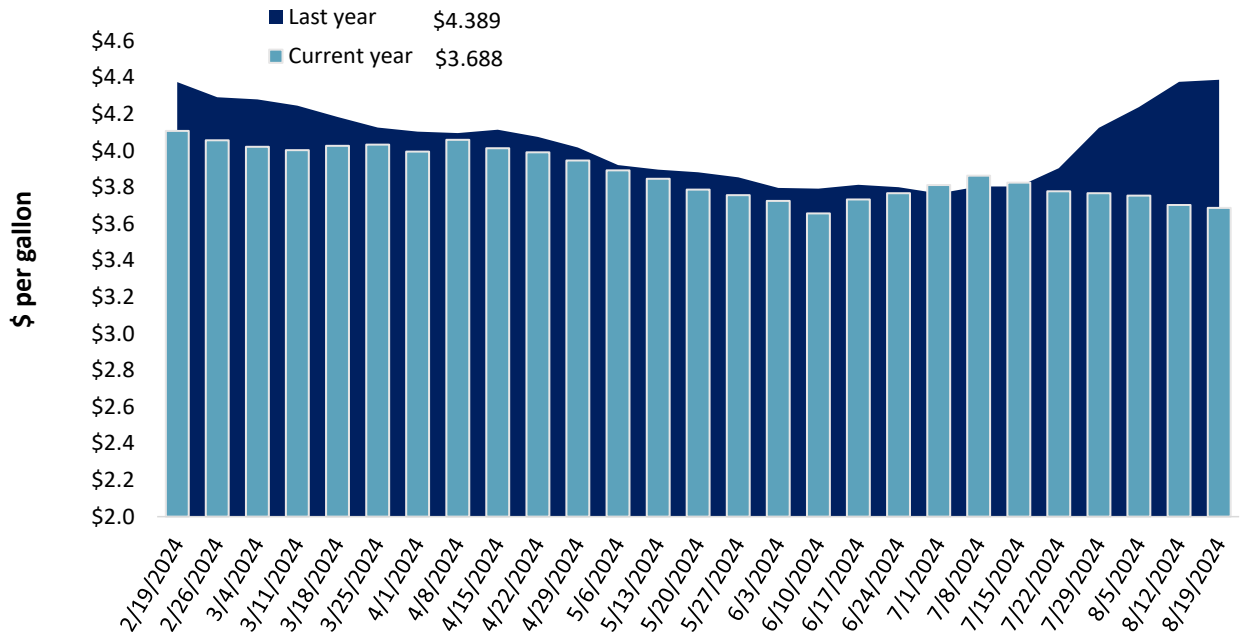
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 8/19/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.757	-0.021	-0.665
	New England	4.019	-0.039	-0.395
	Central Atlantic	3.935	-0.026	-0.618
	Lower Atlantic	3.664	-0.017	-0.710
II	Midwest	3.674	-0.007	-0.628
III	Gulf Coast	3.355	-0.016	-0.740
IV	Rocky Mountain	3.650	-0.047	-0.850
V	West Coast	4.294	-0.015	-0.846
	West Coast less California	3.905	-0.008	-0.889
	California	4.739	-0.024	-0.796
Total	United States	3.688	-0.016	-0.701

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 August 19, the U.S. average diesel fuel price decreased 1.6 cents from the previous week to $3.688 per gallon, 70.1 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 8/08/2024	1,240	810	1,805	1,093	64	5,012	5,073	2,879	12,963
	This week year ago	710	678	1,467	655	96	3,605	2,754	2,036	8,396
	Last 4 wks. as % of same period 2022/23	187	121	129	175	107	147	232	152	176
Current shipped (cumulative) exports sales	2023/24 YTD	901	642	1,268	1,009	96	3,916	50,744	43,059	97,719
	2022/23 YTD	567	1,009	970	593	24	3,164	37,794	51,010	91,968
	YTD 2023/24 as % of 2022/23	159	64	131	170	0	124	134	84	106
	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 8/8/2024	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	3,599	22,455	15,360	46	15,445
China	0	2,819	7,584	-63	14,427
Japan	844	11,017	6,839	61	9,283
Colombia	267	6,339	2,388	166	3,592
Korea	1	2,415	821	194	1,938
Top 5 importers	**4,711**	**45,045**	**32,992**	**37**	**44,685**
Total U.S. corn export sales	6,633	55,817	40,549	38	55,397
% of YTD current month's export projection	11%	98%	96%	-	-
Change from prior week	801	121	233	-	-
Top 5 importers' share of U.S. corn export sales	**71%**	**81%**	**81%**	**-**	**81%**
USDA forecast August 2024	**58,423**	**57,153**	**42,217**	**35**	**-**
Corn use for ethanol USDA forecast, August 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 8/08/2024	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	1098	24,508	31,256	-22	32,321
Mexico	590	4,823	4,695	3	4,912
Egypt	147	1,528	1,151	33	2,670
Japan	125	2,164	2,347	-8	2,259
Indonesia	95	2,216	1,872	18	1,973
Top 5 importers	**2,054**	**35,239**	**41,321**	**-15**	**44,133**
Total U.S. soybean export sales	**5,865**	**45,938**	**53,046**	**-13**	**56,656**
% of YTD current month's export projection	12%	99%	98%	-	-
Change from prior week	1,344	222	-49	-	-
Top 5 importers' share of U.S. soybean export sales	**35%**	**77%**	**78%**	**-**	**78%**
USDA forecast, August 2024	**50,354**	**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 08/08/2024	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	1,504	1,326	13	3,298
Philippines	1,078	1,001	8	2,494
Japan	751	810	-7	2,125
China	139	157	-11	1,374
Korea	848	409	107	1,274
Taiwan	449	452	-1	921
Nigeria	163	104	57	920
Thailand	294	155	90	552
Colombia	149	141	6	522
Vietnam	153	129	19	313
Top 10 importers	**5,529**	**4,684**	**18**	**13,792**
Total U.S. wheat export sales	**8,928**	**6,770**	**32**	**18,323**
% of YTD current month's export projection	40%	35%		-
Change from prior week	340	360	-	-
Top 10 importers' share of U.S. wheat export sales	**62%**	**69%**	**-**	**75%**
USDA forecast, August 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.

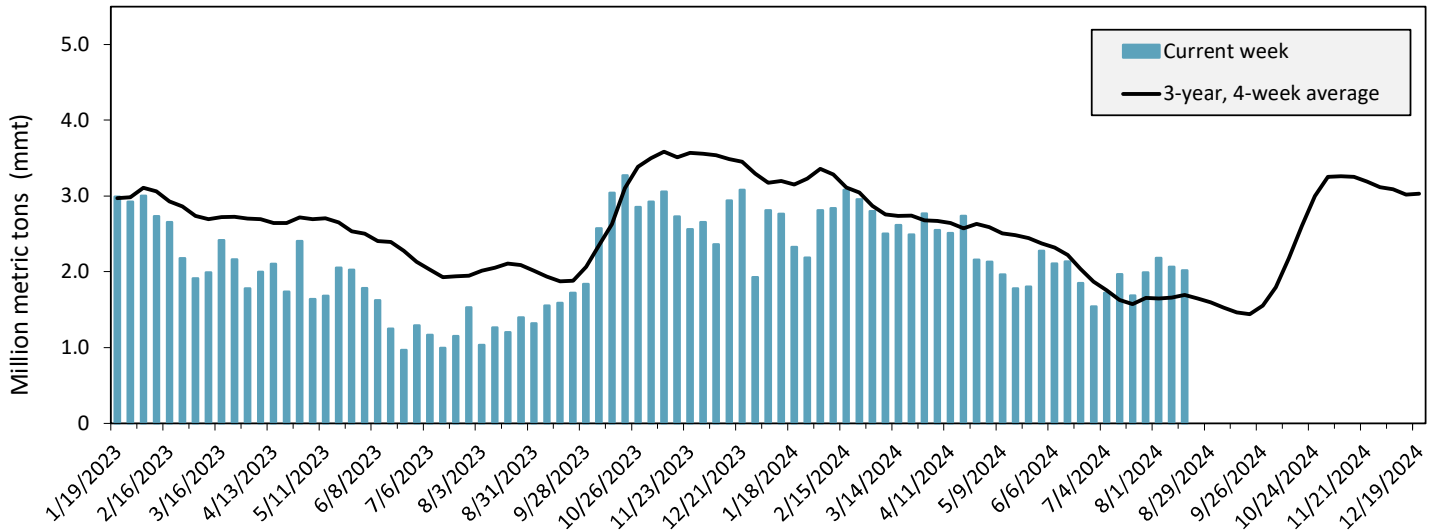
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 08/15/2024	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	187	183	102	11,502	3,983	289	n/a	242	5,267
	Soybeans	0	10	0	2,533	3,356	75	95	11	10,286
	Wheat	271	340	80	6,955	6,073	115	161	122	9,814
	All Grain	**457**	**533**	**86**	**22,076**	**13,607**	**162**	**290**	**147**	**25,913**
Mississippi Gulf	Corn	618	495	125	16,891	16,156	105	219	123	23,630
	Soybeans	290	229	126	12,741	13,889	92	94	79	26,878
	Wheat	8	96	9	3,223	2,341	138	57	64	3,335
	All Grain	**916**	**826**	**111**	**32,915**	**32,387**	**102**	**139**	**101**	**53,843**
Texas Gulf	Corn	8	8	111	328	206	159	76	68	397
	Soybeans	0	0	n/a	0	49	0	n/a	n/a	267
	Wheat	0	108	0	1,098	1,272	86	1008	118	1,593
	All Grain	**116**	**174**	**67**	**3,855**	**3,306**	**117**	**182**	**123**	**5,971**
Interior	Corn	348	301	116	8,701	5,881	148	177	175	10,474
	Soybeans	108	109	99	4,489	3,454	130	180	151	6,508
	Wheat	65	89	74	1,891	1,459	130	134	107	2,281
	All Grain	**522**	**500**	**104**	**15,225**	**10,878**	**140**	**170**	**153**	**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	32	0	292	162	180	n/a	646	581
	All Grain	**0**	**32**	**0**	**310**	**214**	**145**	**n/a**	**287**	**831**
Atlantic	Corn	5	0	n/a	213	82	259	351	166	166
	Soybeans	1	1	n/a	439	1,178	37	8	9	2,058
	Wheat	3	1	259	27	74	37	123	43	101
	All Grain	**9**	**2**	**463**	**679**	**1,334**	**51**	**67**	**46**	**2,325**
All Regions	Corn	1,166	986	118	37,635	26,341	143	247	147	40,004
	Soybeans	398	350	114	20,274	22,060	92	113	90	46,459
	Wheat	348	667	52	13,487	11,383	118	135	107	17,738
	All Grain	**2,019**	**2,067**	**98**	**75,114**	**61,843**	**121**	**172**	**122**	**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.

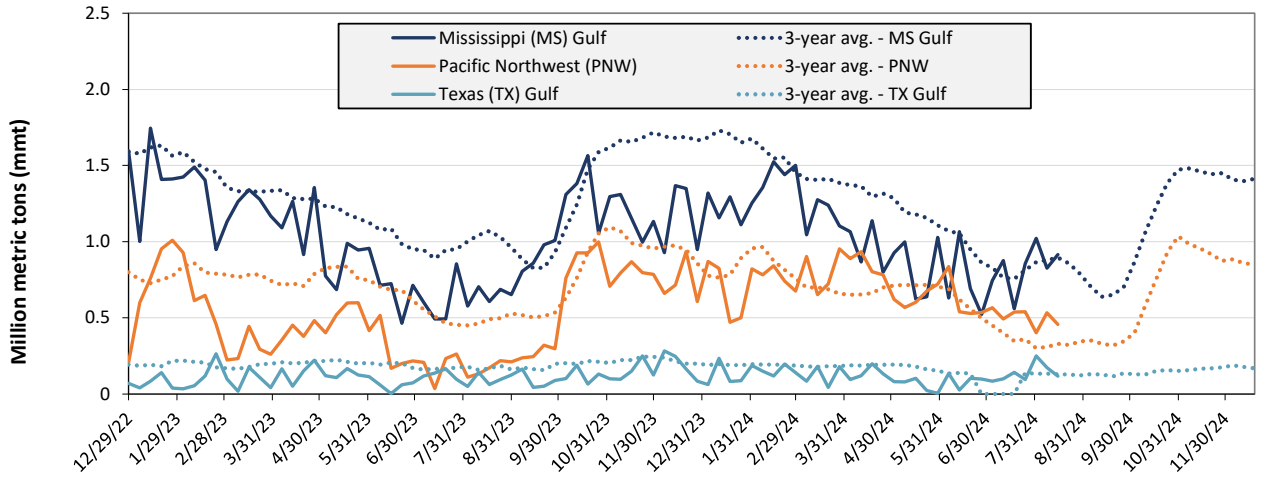
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 15: 2 mmt of grain inspected, down 2 percent from the previous week, up 84 percent from the same week last year, and up 19 percent from the 3-year, 4-week average.

Note: 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 08/15/24 inspections (mmt):
MS Gulf: 0.92
PNW: 0.46
TX Gulf: 0.12

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 11	down 33	up 3	down 14
Last year (same 7 days)	up 66	up 100	up 69	up 184
3-year average (4-week moving average)	up 2	down 10	un-changed	up 39

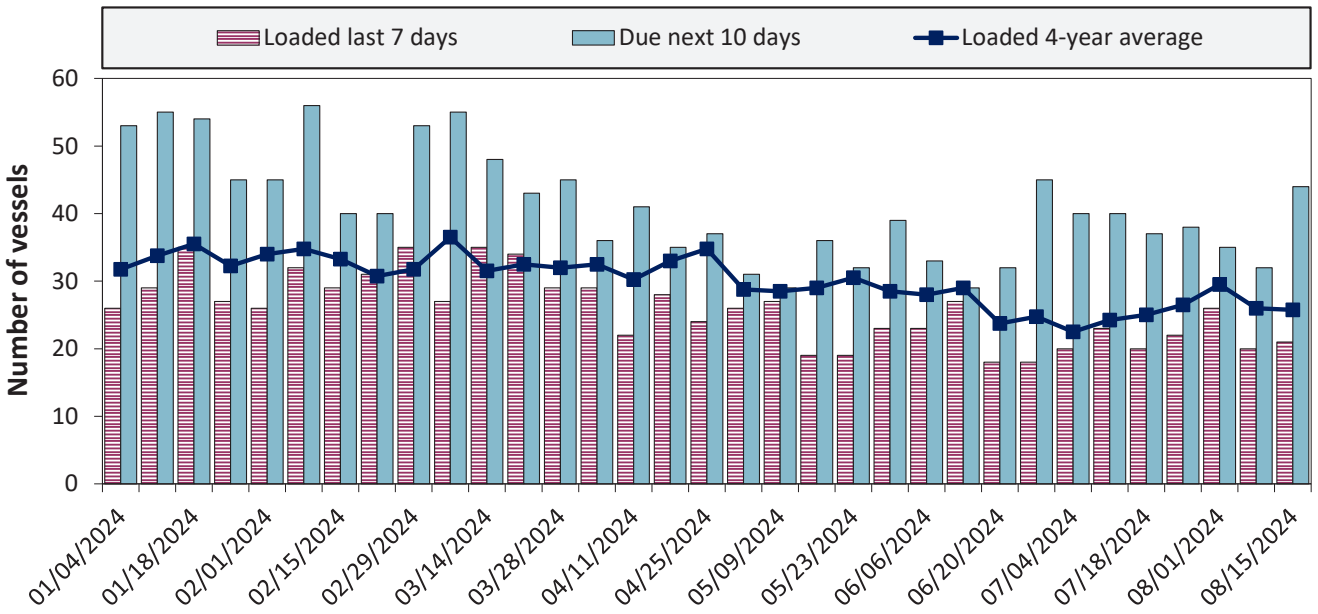
Source: USDA, Federal Grain Inspection Service.

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
8/15/2024	13	21	44	11
8/8/2024	14	20	32	8
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.

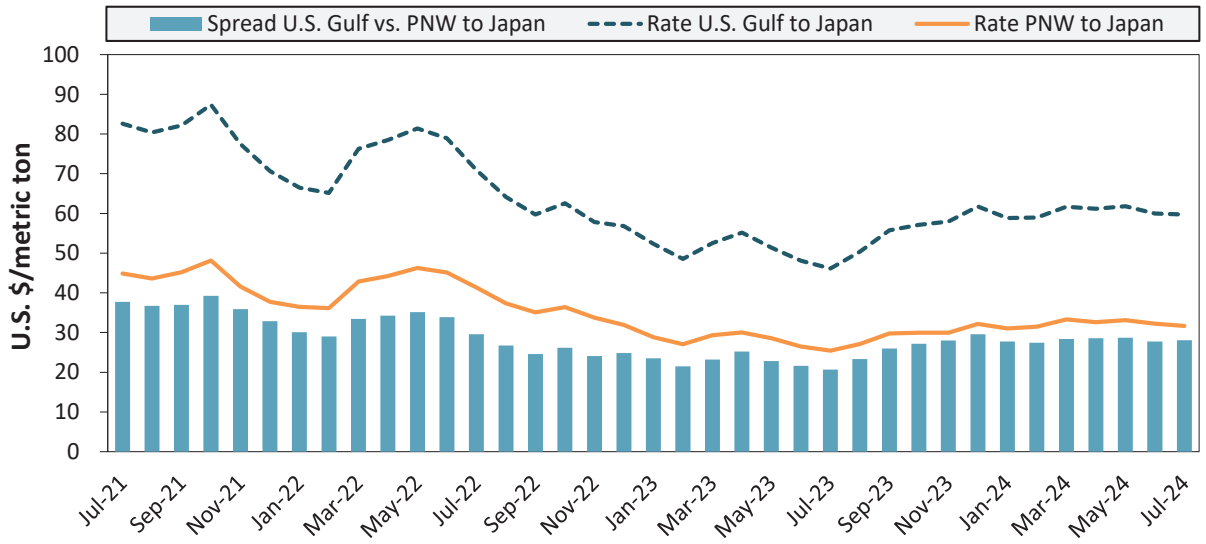
Figure 17. U.S . Gulf vessel loading activity



Week ending 8/15/24, number of vessels	Loaded	Due
Change from last year	17%	33%
Change from 4-year average	-18%	29%

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.

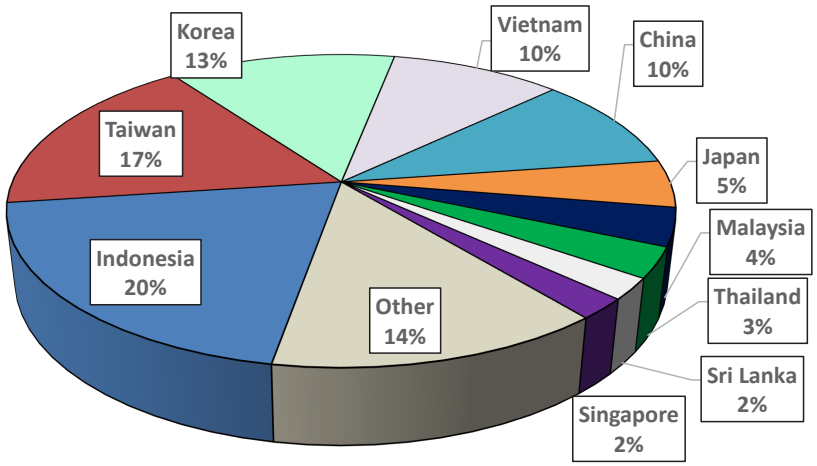
Table 18. Ocean freight rates for selected shipments, week ending 08/17/2024

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 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	Portugal	Heavy grain	Aug 15, 2024	Aug 15/19, 2024	25,000	25.50
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.

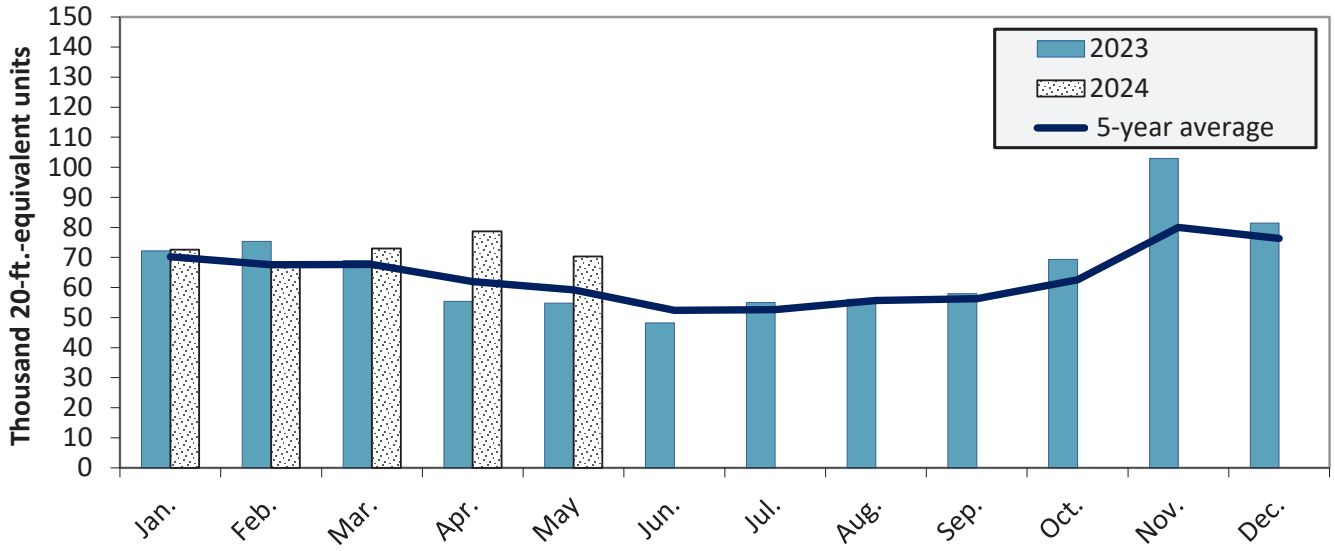
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined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

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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***.

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