



Grain Transportation Report

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Port of Galveston Prepares To Demolish Historic Grain Elevator.

Texas's [Port of Galveston](#) is preparing to demolish its almost century-old grain export facility to make room for new cargo terminals (e.g., roll-on/roll-off cargo and wind turbine pieces). Until last year, Archer Daniels Midland (ADM) leased the 3-million-bushel export facility.

According to PIERS ([available on AgTransport](#)), the Port of Galveston exported 2.4 million metric tons (mmt) of bulk grains in 2010. Galveston was the fifth-largest port for bulk grain exports that year. By 2023, Galveston exported just 123,000 metric tons of bulk grains.

The closure of the Galveston grain export terminal reflects the decline in U.S. wheat exports. According to USDA's [Economic Research Service](#), in the early 2000s, the U.S. share of global wheat exports averaged 25 percent; for the 2023/24 marketing year, the U.S. share is projected at 9 percent.

Annual NGCC Meeting Highlights Concerns With Mexican Rail Service.

On August 27, the Surface Transportation Board (STB) convened its annual [National Grain Car Council](#) (NGCC) meeting to discuss issues relevant to grain transportation and railroads' preparedness to handle the fall harvest. NGCC includes representatives from Class I railroads, short line railroads, grain shippers/receivers, and rail equipment manufacturers/lessors.

Railroads expressed confidence in their ability to handle the upcoming harvest, but also expressed concern about rail service in Mexico.

Mexico is the top buyer of U.S. grain exports (particularly corn), and about two-thirds of grain exports to Mexico travel overland by rail. For almost a year, grain exporters have experienced periodic disruptions in rail transportation to Mexico—especially with Ferromex.

In recent weeks, BNSF Railway announced a 30-day pause on all grain shuttle trains to Mexico ([Grain Transportation Report, August 22, 2024, second highlight](#)). Echoing railroads' concerns about Mexican rail disruptions, STB members said the agency is committed to working with other Federal agencies and railroads to reach a solution. For more on this issue and STB's NGCC meeting, see [this week's feature](#).

FMCSA Awards \$3.5 Million For CDL Training Programs. On Monday, August 26, the Federal Motor Carrier Safety Administration (FMCSA) [announced grant awards](#) to 27 commercial drivers' license (CDL) training programs. In total, almost \$3.5 million was awarded for 2024. The grants are intended to expand the number of CDL holders with enhanced operator safety training; provide opportunities for current or former members of the U.S. Armed Forces; and increase training opportunities for candidates from rural, refugee, and underserved communities.

On a broad scale, the funding is intended to strengthen America's supply chains and meet the growing demand for truck drivers nationally. Of the total amount awarded, 30 percent went to six key grain-producing States.

The largest [recipient](#), Iowa, received \$509,775, for the State's four community colleges. Other grain-producing States were awarded grants as follows (in descending order): Kansas (\$139,980); Illinois (\$133,131); Indiana (\$129,870); and Ohio (\$126,000). In each of these States, one community college received the grant.

South Carolina Extends Waiver of Trucking Restrictions. Responding to disruptions caused by Tropical Storm Debby, South Carolina has extended the waiver for certain trucking regulations for transporting essential fuels and feed.

[On August 18](#), South Carolina's statewide waiver extended the suspension of certain size and weight restrictions and penalties for vehicles until December 16. South Carolina also extended the waiver for the maximum hours of service for commercial vehicles transporting fuels, petroleum products, newly harvested crops, and feed for livestock and poultry until September 17.

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 22, [unshipped balances](#) of corn and soybeans for marketing year (MY) 2023/24 totaled 4.73 million metric tons (mmt), down 27 percent from last week and up 47 percent from the same time last year. The [unshipped balance](#) of wheat for MY 2024/25 was 4.99 mmt, down 1 percent from last week and up 37 percent from the same time last year.

Net [corn export sales](#) for MY 2023/24 were 0.015 mmt, down 87 percent from last week. Net [soybean export sales](#) were -0.14 mmt, down significantly from last week. Net [wheat export sales](#) for MY 2024/25 were 0.53 mmt, up 8 percent from last week.

Rail

U.S. Class I railroads originated 22,138 [grain carloads](#) during the week ending August 24. This was an 11-percent decrease from the previous week, 33 percent more than last year, and 14 percent more than the 3-year average.

Average September [shuttle secondary railcar bids/offers](#) (per car) were \$201 above tariff for the week ending August 29. This was \$201 more than last week and \$335 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$400 above tariff. This was \$190 more than last week, and \$263 more than this week last year.

Barge

For the week ending August 31, [barged grain movements](#) totaled 480,750 tons. This was 17 percent less than the previous week and 293 percent more than the same period last year.

For the week ending August 31, 357 grain barges [moved down river](#)—27 fewer than last week. There were 579 grain barges [unloaded](#) in the New Orleans region, 12 percent more than last week.

Ocean

For the week ending August 29, 25 [oceangoing grain vessels](#) were loaded in the Gulf—9 percent more than the same period last year. Within the next 10 days (starting August 30), 47 vessels were expected to be loaded—12 percent more than the same period last year.

As of August 29, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$56.00, 2 percent less than the previous week. The rate from the Pacific Northwest to Japan was \$30.00 per mt, 2 percent less than the previous week.

Fuel

For the week ending September 2, the U.S. average [diesel price](#) decreased 2.6 cents from the previous week to \$3.625 per gallon, 86.7 cents below the same week last year.



STB, Shippers, and Railroads Discuss Rail Service Ahead of Autumn Harvest

On August 27, the Surface Transportation Board (STB) convened its annual [National Grain Car Council](#) (NGCC) meeting in Kansas City, MO, to discuss issues relevant to grain transportation and railroads' preparedness to handle the fall harvest.¹ NGCC consists of representatives from railroads, shippers, receivers, and rail equipment manufacturers and lessors.

This article provides a synopsis of three themes that emerged during the meeting: first, U.S. grain narrowly avoided significant costs and disruptions from the recent Canadian rail work stoppage. Second, shippers and STB remain concerned about persistent episodic poor rail service to Mexico. Lastly, railroads expressed confidence in their ability to handle the fall harvest. The article concludes with an assessment of where rail service stands heading into harvest.

Grain Shippers Are Optimistic About Resolution to Canadian Strike...

In the NGCC meeting, shippers, railroads, and STB were relieved the recent Canadian rail outage did not last longer. According to

[TransBorder freight data from the U.S. Department of Transportation](#) (from July 2023 through June 2024), over \$30 million per day of agricultural imports and exports crossed the U.S.-Canadian border by rail. At NGCC, Canadian National Railway (CN) indicated, as a rule of thumb, it takes 3 to 5 days to recover for each day out.

As reported previously in the *Grain Transportation Report (GTR)*, both Canadian railroads—CN and Canadian Pacific Kansas City (CPKC)—initiated lockouts on August 22 following months of failed negotiations with Teamsters Canada Rail Conference (TCRC), the union representing Canadian rail workers. Later that day, Canada's Labor Minister requested an end to the rail stoppage through the Canadian Industrial Relations Board (CIRB), an independent tribunal with oversight of certain labor matters. CN resumed operations on August 23, and CPKC resumed operations on August 26 ([GTR, August 29, 2024, first highlight](#)). Expressing disappointment in the Canadian government's intervention, TCRC [filed court challenges](#) against CIRB's decision.

...But Remain Wary of Mexican Rail Service

A recurring theme throughout the meeting involved periodic disruptions in rail grain carloads to Mexico for almost a year—particularly with Ferromex (FXE), one of the two major Mexican railroads.

Background: Mexican Railroad Capacity.

About two-thirds of grain exports to Mexico are moved by rail, and one-third travels by ocean vessel (from New Orleans to Veracruz). El Paso, TX; Eagle Pass, TX; and Laredo, TX, are the three primary rail border crossings. Kansas City Southern de Mexico (a subsidiary of CPKC) services the Laredo border crossing, while FXE handles the El Paso and Eagle Pass crossings.

Growth in Trade. Mexico is the top buyer of U.S. grain, and exports have risen significantly in recent years, spurred by a new trade agreement with Mexico implemented in 2020 and, more recently, lower Mexican grain production ([fig. 1](#)).² More specifically, Mexico is the top buyer of U.S. corn and wheat and second-largest buyer of U.S. soybeans. In the first half of 2024, inspections of grain exports

1 NGCC is an advisory body founded by the Interstate Commerce Commission (STB's predecessor agency) in 1994. In addition to advising STB on grain-related matters, the NGCC provides a forum for the resolution of disputes and controversies regarding grain transportation.

2 On July 1, 2020, the United States–Mexico–Canada Agreement (USMCA) went into effect. This treaty replaced the North American Free Trade Agreement (NAFTA).

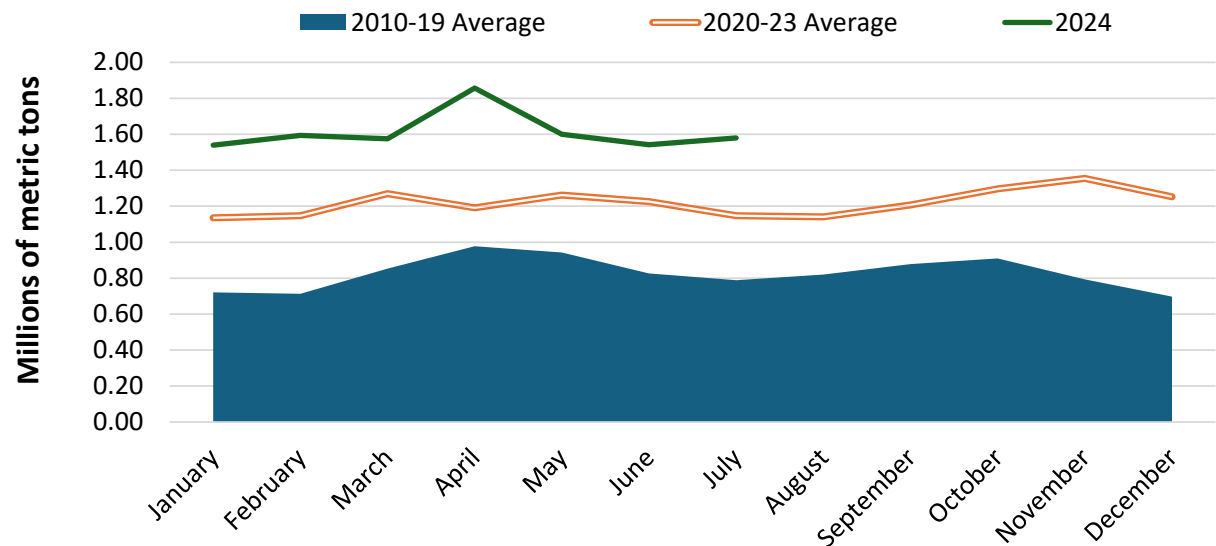
to Mexico set new record highs following drought in Mexico. In April 2024—the highest single month on record—1.9 mmt of U.S. grain shipped to Mexico by rail (fig. 1). Total U.S. imports (all commodities) from Mexico (via rail) have also been up—24 percent above the 5-year average in the first half of 2024.

U.S. Agriculture and BNSF Response to Service Issues. The growth in U.S.-Mexico trade has stressed FXE’s network. In a [July 31 letter](#), a group of agricultural associations expressed concern to Federal officials over “rail service capacity issues in Mexico that are hindering U.S. agricultural trade” ([GTR, August 8, 2024, first highlight](#)). In a [July 23 communication](#) to BNSF Railway (BNSF), STB’s Chair shared this concern of “incidents in Mexico...upend[ing] significant portions of BNSF’s network.”

In the latest development, BNSF will not issue any permits for grain shuttle trains destined to Mexico for 30 days, from August 21 to September 20 ([GTR, August 22, 2024, second highlight](#)). BNSF acted in response to service disruptions that have stranded 5,000 of the railroad’s cars and 160 of its locomotives in Mexico. At the NGCC meeting, BNSF emphasized that it needs these resources to “execute a successful harvest” in the United States.

STB and Shipper Reactions. In response to the NGCC meeting’s shipper panel, STB’s Chair observed that—having “dodged a bullet” regarding the (now resolved) Canadian rail

Figure 1. Grain inspections to Mexico by rail



Source: Analysis of [USDA’s Federal Grain Inspection Service data](#).

labor disruptions—U.S. agriculture was “still in the bullseye” regarding the Mexican rail issues. STB has had ongoing discussions about the Mexican rail service issues with the railroads and other Federal agencies (including USDA). In the NGCC meeting, STB requested data from shippers and other stakeholders, as available (such as shipment volumes this year versus last year), to better understand the impacts of the Mexican rail service disruptions.

During the shipper panel, shippers highlighted the needs for continual open dialogue and for timely information to navigate the Mexican rail disruptions. STB acknowledged repeated complaints from shippers that they need more advanced notice on when FXE will issue a permit. Grain shippers characterized their

mood going into harvest as a mix between “nervousness” and “skepticism” about logistics (especially in light of BNSF’s recent embargo), as well as “optimism” over increased soybean export sales in recent weeks ([GTR table 14](#)).

Class I Railroads Express Confidence

According to USDA’s [August World Agricultural Supply and Demand Estimates \(WASDE\) report](#), this year’s corn and soybean harvests are projected at 510 million metric tons (mmt), 1 percent above last year and 4 percent above the 5-year average. As summarized below, all Class I railroads were optimistic in their ability to handle the increased corn and soybean harvest.

In the West. Since last year, BNSF lowered its active shuttle fleet from 155 to 140 grain shuttle trains. However, BNSF said its 32,000-car fleet, including 400 new jumbo hopper cars, positions the railroad well to handle volume “slightly above last year.” BNSF’s shuttle turns are currently at 2.6 trips per month to the Pacific Northwest (PNW) and 2.3 trips per month systemwide. BNSF said, “We’re ready for harvest.” However, STB’s Chair cited BNSF’s current (poor) performance in handling the wheat harvest (mainly in Montana) as a troubling sign for the railroad’s ability to handle the larger fall harvest.

STB’s Chair commended Union Pacific Railroad (UP) for its service improvements in 2024. The railroad has prepositioned assets for PNW exports this harvest and expanded its covered hopper fleet, by more than 25 percent since 2020. UP said it does not have “major concerns” and is “well-positioned to support our customers with harvest demand this year.”

In the East. CSX Transportation (CSX) noted its “harvest readiness” is “the best that it’s been since 2019,” because of improvements in both CSX service and customer demand. CSX expects strong demand due to high grain supply in the eastern Cornbelt, where corn is up 2 percent and soybeans, up 10 percent, from last year. Also, low production in the Southeast will create demand for imported grain (from the eastern Cornbelt): in that region, drought

has reduced corn by 33 percent and soybeans by 6 percent from last year. CSX will start with 30 unit trains of 90 cars each and expects to run up to 55 unit trains during peak harvest

Norfolk Southern Railway (NS), too, said it “is ready for harvest.” Despite still needing to hire at a few key locations, NS believes it is sufficiently staffed and confident it will be able to provide good service. NS grain trains are running faster than they did earlier in the year, and in August, the NS covered hopper fleet moved 24 percent faster than in August last year.

Canada and Central United States. CN said it was back up and running the day after the recent Canadian rail work stoppage, and the railroad does not expect the stoppage to impact harvest rail service. According to CN, compared to this time last year, the railroad’s crew count is up; more CN locomotives are running; and twice as many locomotives (34) as at this time last year are in storage. In the United States, CN’s network parallels the Mississippi River (from the Cornbelt to New Orleans) and shares markets with barge services. Thus, barge disruptions and/or increased export demand can increase demand for CN services ([GTR, May 2, 2024](#)).

CPKC said its work stoppage in Canada, which ended on August 26, had minimal impacts on its U.S. and Mexico operations. The railroad expects at least 80 percent of its grain cars to

move in unit trains this harvest. CPKC also noted that it has seen increased traffic a year into its merger with Kansas City Southern ([GTR table 3](#)).

Assessment and Wrap-Up

This year’s fall harvest is projected to be above average, and railroads say they are well-positioned to handle it. For several weeks, rail grain carloads have been strong ([GTR fig. 3](#)), but current metrics show some signs of service issues.

According to weekly [STB service metrics](#) (week ending August 24), grain train speeds—which were mostly stable since May—have decreased the past 2 weeks to a new low for 2024 ([GTR table 4a](#)). Lower grain train speeds signal less efficiency. Also concerning, a rise in the number of unfilled grain car orders (in manifest service) corresponds to worsened order fulfillment for grain: that number has ticked up almost every week since late June—from 780 cars for the week ending June 22 to 2,006 cars for the week ending August 24 ([GTR table 4b](#)).

In closing the NGGC meeting, STB’s Chair stressed that an efficiently handled harvest benefits all stakeholders—farmers, shippers, and railroads, alike—as well as the wider economy.

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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.

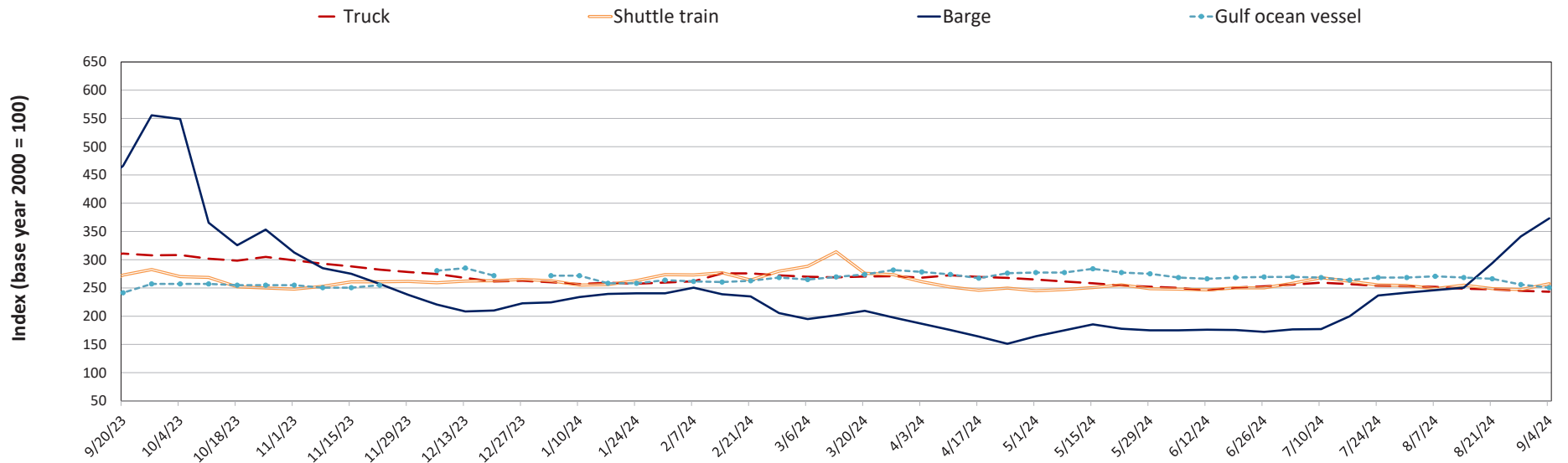
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
09/04/24	243	342	258	373	250	213
08/28/24	245	330	247	341	256	216
09/06/23	301	321	244	358	239	202

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 09/04/24



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.

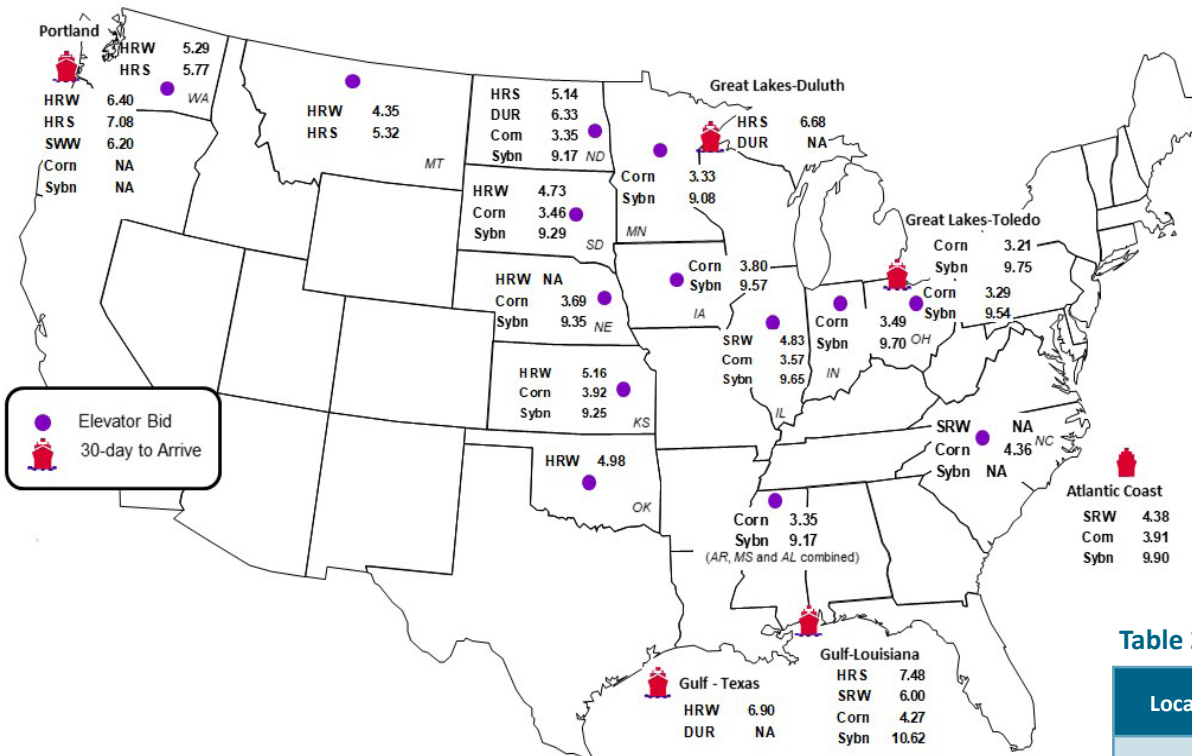


Table 2a. Market update: U.S. origins to export position price spreads (\$/bushel)

Commodity	Origin-destination	8/30/2024	8/23/2024
Corn	IL-Gulf	-0.70	-0.73
Corn	NE-Gulf	-0.58	-0.57
Soybean	IA-Gulf	-1.05	-0.98
HRW	KS-Gulf	-1.74	-2.02
HRS	ND-Portland	-1.94	-2.28

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

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 2b. Futures

Location	Grain	Month	8/30/2024	Week ago 8/23/2024	Year ago 9/1/2023
Kansas City	Wheat	Dec	5.610	5.362	7.236
Minneapolis	Wheat	Dec	6.004	5.722	7.630
Chicago	Wheat	Dec	5.494	5.302	6.002
Chicago	Corn	Dec	4.014	3.912	4.814
Chicago	Soybean	Nov	10.070	9.730	13.636

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.

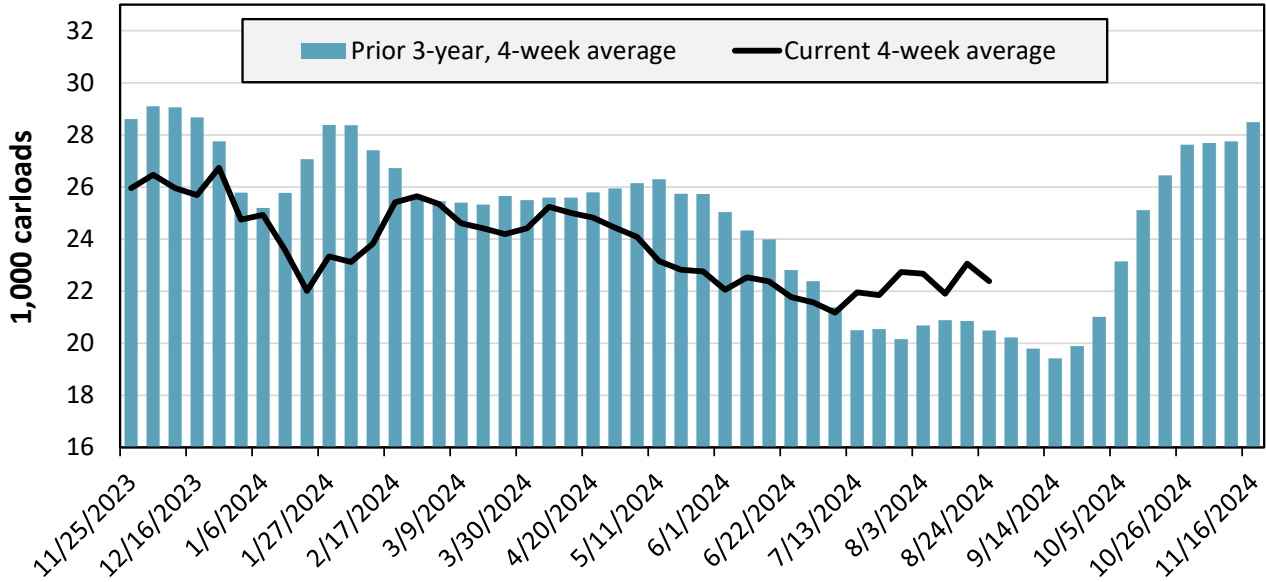
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 8/24/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,204	2,853	9,882	4,975	2,318	906	22,138
This week last year	727	1,592	7,243	3,750	2,462	852	16,626
2024 YTD	56,274	91,263	351,037	173,676	91,453	31,359	795,062
2023 YTD	59,461	89,022	293,639	176,787	76,994	43,257	739,160
2024 YTD as % of 2023 YTD	95	103	120	98	119	72	108
Last 4 weeks as % of 2023	139	136	135	111	98	117	124
Last 4 weeks as % of 3-yr. avg.	116	130	115	95	104	91	109
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 24, grain carloads were down 3 percent from the previous week, up 24 percent from last year, and up 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: 8/24/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	22.4	20.8	18.7	17.7	10.4	9.8	48.2	21.1
	Average over last 4 weeks	22.4	25.4	23.2	18.4	8.6	22.9	46.2	23.9
	Average of same 4 weeks last year	44.6	34.5	13.2	16.3	7.2	15.6	10.2	20.2
Grain unit train speeds (miles per hour)	This week	23.2	20.7	23.3	21.7	23.0	17.7	21.5	21.6
	Average over last 4 weeks	23.3	20.3	23.3	22.0	24.5	19.0	23.5	22.3
	Average of same 4 weeks last year	23.6	17.0	24.7	22.3	24.7	21.4	25.5	22.7

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

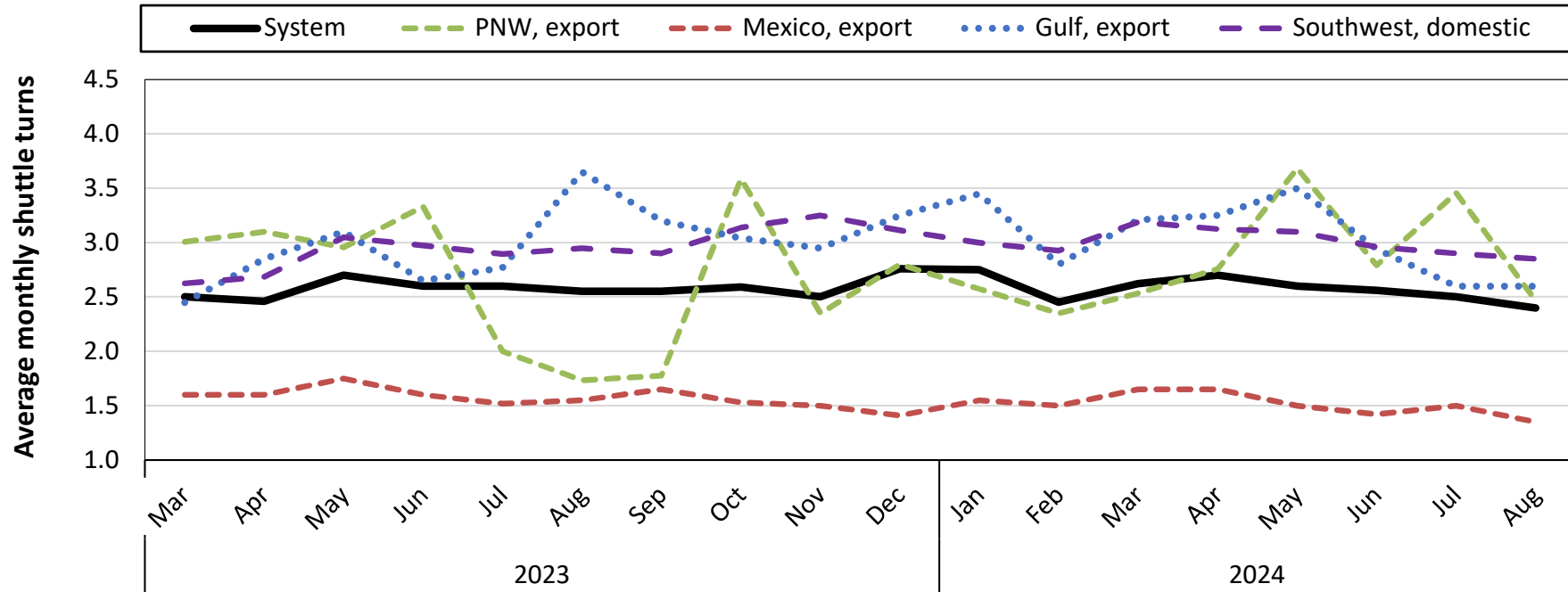
For the week ending: 8/24/2024		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Empty grain cars not moved in over 48 hours (number)	This week	15	10	326	137	4	117	150	758
	Average over last 4 weeks	17	7	468	127	5	73	88	784
	Average of same 4 weeks last year	38	11	498	70	5	61	26	709
Loaded grain cars not moved in over 48 hours (number)	This week	35	144	803	142	7	71	146	1,348
	Average over last 4 weeks	32	143	703	117	6	189	52	1,240
	Average of same 4 weeks last year	25	256	397	105	6	112	75	975
Grain unit trains held (number)	This week	0	0	17	8	0	6	7	39
	Average over last 4 weeks	0	0	20	7	0	6	5	39
	Average of same 4 weeks last year	0	3	8	7	0	2	6	26
Unfilled grain car orders (number)	This week	2	4	1,528	194	0	148	130	2,006
	Average over last 4 weeks	9	2	1,637	367	0	189	59	2,262
	Average of same 4 weeks last year	0	38	306	90	0	137	61	632

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

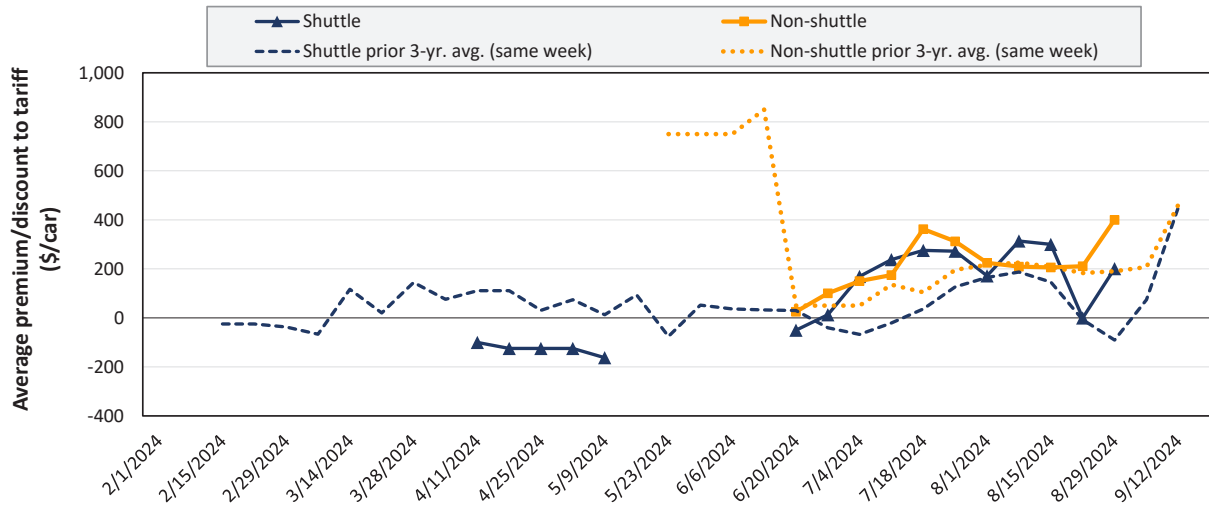


Average monthly system-wide grain shuttle turns reported in the first week of August 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.47 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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 September 2024



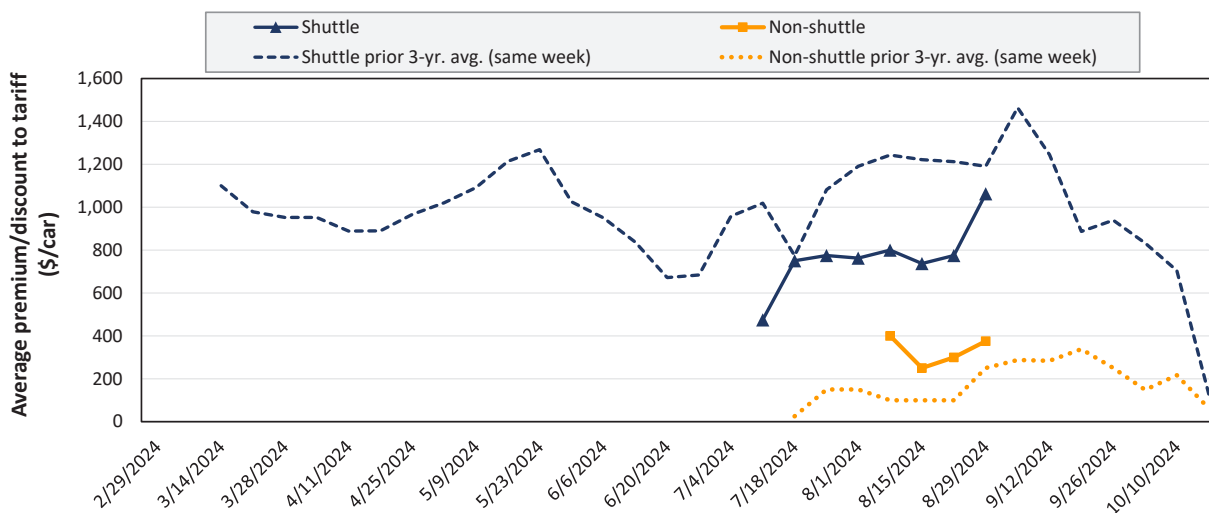
Average non-shuttle bids/offers rose \$190 this week, and are at the peak.

Average shuttle bids/offers rose \$201 this week and are \$112 below the peak.

8/29/2024	BNSF	UP
Non-Shuttle	\$550	\$250
Shuttle	\$294	\$108

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 October 2024



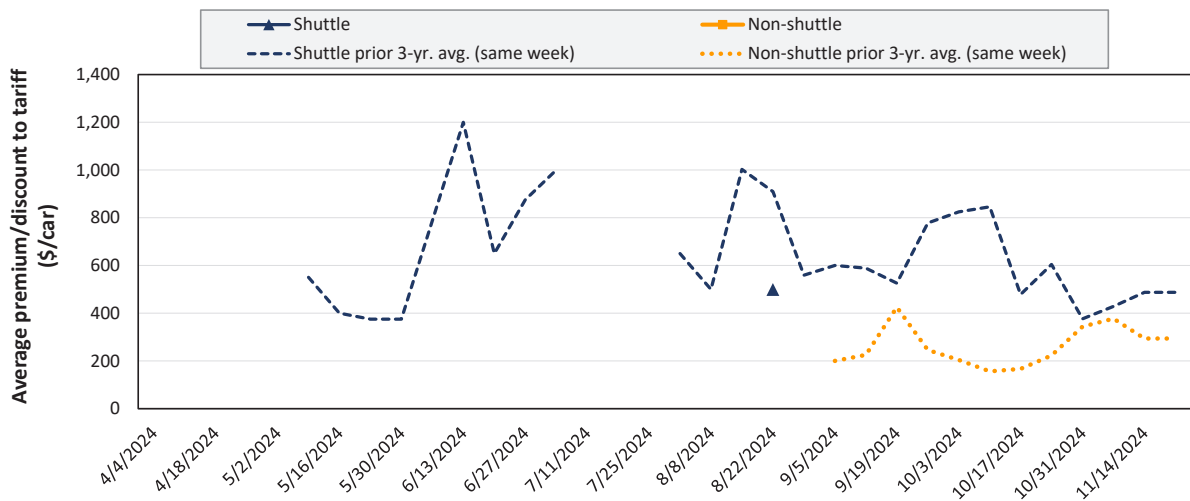
Average non-shuttle bids/offers rose \$75 this week, and are \$25 below the peak.

Average shuttle bids/offers rose \$288 this week and are at the peak.

8/29/2024	BNSF	UP
Non-Shuttle	\$500	\$250
Shuttle	\$1,225	\$900

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 November 2024



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

There were no shuttle bids/offers this week.

8/29/2024	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

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: 8/29/2024		Delivery period					
		Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25
Non-shuttle	BNSF	550	500	n/a	n/a	n/a	n/a
	Change from last week	167	200	n/a	n/a	n/a	n/a
	Change from same week 2023	425	n/a	n/a	n/a	n/a	n/a
	UP	250	250	n/a	n/a	n/a	n/a
	Change from last week	212	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	100	50	n/a	n/a	n/a	n/a
Shuttle	BNSF	294	1,225	n/a	n/a	n/a	n/a
	Change from last week	294	400	n/a	n/a	n/a	n/a
	Change from same week 2023	338	147	n/a	n/a	n/a	n/a
	UP	108	900	n/a	n/a	n/a	n/a
	Change from last week	108	175	n/a	n/a	n/a	n/a
	Change from same week 2023	333	75	n/a	n/a	n/a	n/a
	CPKC	n/a	500	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2023	n/a	-300	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, September 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	\$177	\$51.32	\$1.40	21
	Grand Forks, ND	Duluth-Superior, MN	\$3,862	\$45	\$38.80	\$1.06	-4
	Wichita, KS	Los Angeles, CA	\$7,020	\$230	\$71.99	\$1.96	-4
	Wichita, KS	New Orleans, LA	\$4,425	\$312	\$47.04	\$1.28	-8
	Sioux Falls, SD	Galveston-Houston, TX	\$6,966	\$188	\$71.05	\$1.93	-2
	Colby, KS	Galveston-Houston, TX	\$4,675	\$341	\$49.81	\$1.36	-8
	Amarillo, TX	Los Angeles, CA	\$5,585	\$475	\$60.18	\$1.64	8
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$352	\$43.22	\$1.10	-0
	Toledo, OH	Raleigh, NC	\$8,877	\$0	\$88.15	\$2.24	4
	Des Moines, IA	Davenport, IA	\$2,830	\$75	\$28.84	\$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	\$219	\$46.12	\$1.17	4
	Des Moines, IA	Los Angeles, CA	\$6,305	\$638	\$68.95	\$1.75	2
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,256	\$506	\$37.36	\$1.02	2
	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	\$5,320	\$352	\$56.33	\$1.53	5

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, September 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	\$132	\$44.44	\$1.21	-4
	Wichita, KS	Galveston-Houston, TX	\$4,411	\$103	\$44.82	\$1.22	-4
	Chicago, IL	Albany, NY	\$7,413	\$0	\$73.61	\$2.00	5
	Grand Forks, ND	Portland, OR	\$6,001	\$228	\$61.86	\$1.68	-3
	Grand Forks, ND	Galveston-Houston, TX	\$5,446	\$234	\$56.40	\$1.54	-2
	Colby, KS	Portland, OR	\$5,923	\$560	\$64.38	\$1.75	-0
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$278	\$58.96	\$1.50	-0
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$254	\$58.33	\$1.48	-0
	Champaign-Urbana, IL	New Orleans, LA	\$4,345	\$352	\$46.64	\$1.18	4
	Lincoln, NE	Galveston-Houston, TX	\$4,560	\$148	\$46.75	\$1.19	4
	Des Moines, IA	Amarillo, TX	\$4,845	\$275	\$50.85	\$1.29	3
	Minneapolis, MN	Tacoma, WA	\$5,660	\$275	\$58.94	\$1.50	-0
	Council Bluffs, IA	Stockton, CA	\$5,780	\$285	\$60.23	\$1.53	3
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,185	\$254	\$63.94	\$1.74	-5
	Minneapolis, MN	Portland, OR	\$6,235	\$278	\$64.67	\$1.76	-5
	Fargo, ND	Tacoma, WA	\$6,085	\$226	\$62.67	\$1.71	-5
	Council Bluffs, IA	New Orleans, LA	\$5,550	\$406	\$59.15	\$1.61	5
	Toledo, OH	Huntsville, AL	\$5,509	\$0	\$54.71	\$1.49	4
	Grand Island, NE	Portland, OR	\$6,185	\$573	\$67.11	\$1.83	4

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.

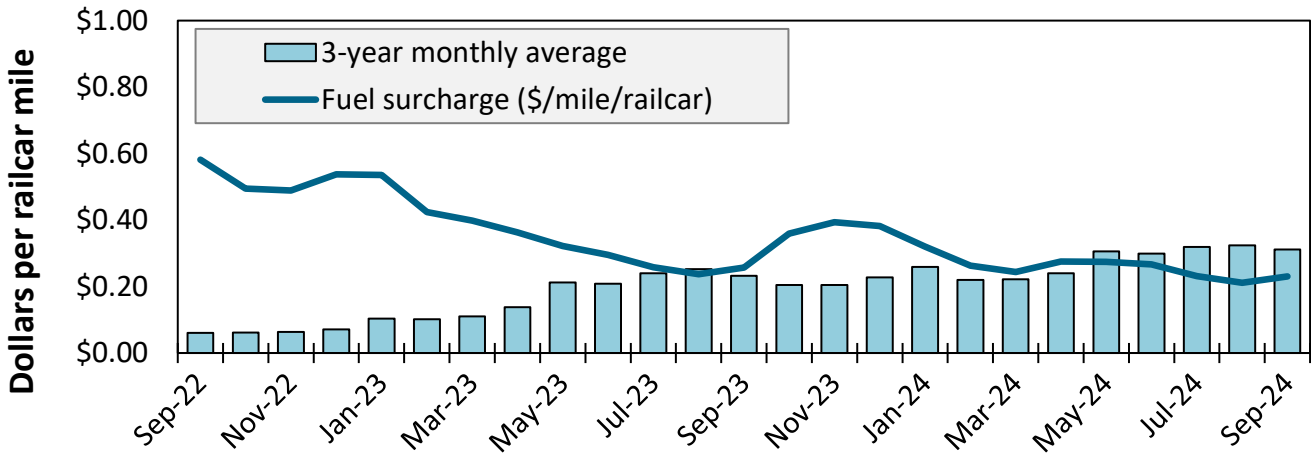
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, September 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	\$4,452	\$43.82	\$1.11	0.9	2.0
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	\$5,506	\$54.19	\$1.38	0.5	1.5
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	\$6,037	\$59.42	\$1.51	0.5	3.3
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,410	\$53.25	\$1.35	0.4	1.6
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	\$5,627	\$55.38	\$1.41	0.5	1.5
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$4,852	\$47.75	\$1.21	0.5	3.5
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$4,989	\$49.10	\$1.25	0.5	3.4
Superior, NE	El Paso, TX	BNSF	Shuttle	\$4,851	\$47.74	\$1.21	0.6	1.9	
Soybeans	Atchison, KS	Laredo, TX	KCS	Non-shuttle	\$5,506	\$54.19	\$1.47	0.5	1.5
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$5,488	\$54.01	\$1.47	0.6	-0.2
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$6,675	\$65.70	\$1.79	4.8	4.2
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$5,491	\$54.04	\$1.47	0.6	-0.2
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,410	\$53.25	\$1.45	0.4	1.6
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$6,781	\$66.74	\$1.82	4.7	4.1
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	\$4,055	\$39.91	\$1.09	0.9	-8.5
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$3,637	\$35.80	\$0.97	1.1	-9.0
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,627	\$45.54	\$1.24	0.4	-8.1
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,410	\$53.25	\$1.45	0.4	1.6
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,511	\$44.40	\$1.21	0.4	-8.3

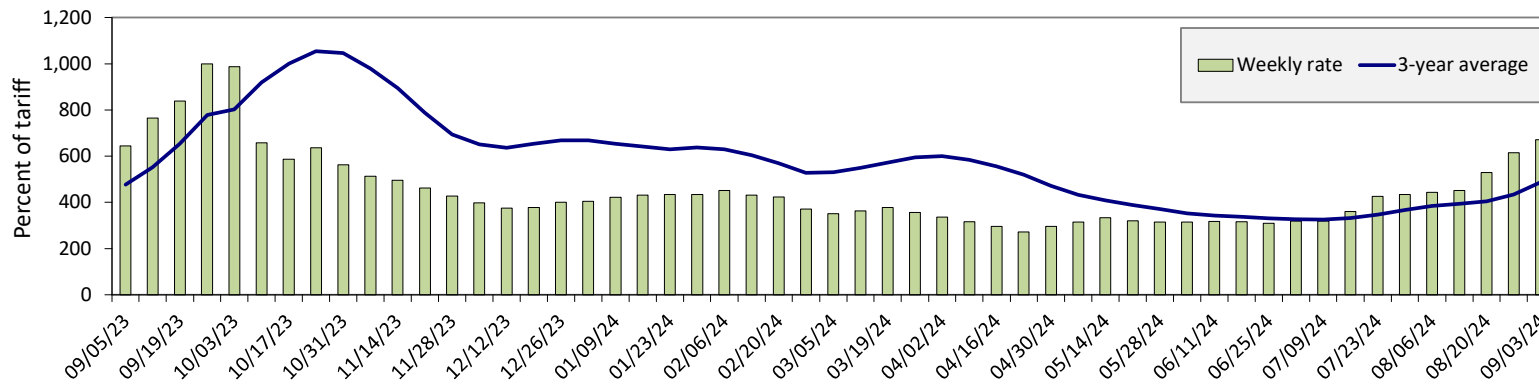
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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



September 2024: \$0.23/mile, up 2 cents from last month's surcharge of \$0.21/mile; down 3 cents from the September 2023 surcharge of \$0.26/mile; and down 8 cents from the September prior 3-year average of \$0.31/mile.

Figure 9. Illinois River barge freight rate



For the week ending September 3: 9 percent higher than the previous week; 4 percent higher than last year; and 38 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	9/3/2024	659	680	672	689	701	701	766
	8/27/2024	642	642	614	617	616	616	731
\$/ton	9/3/2024	40.79	36.18	31.18	27.49	32.88	28.32	24.05
	8/27/2024	39.74	34.15	28.49	24.62	28.89	24.89	22.95
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	-2	6	4	8	9	9	10
	3-year avg.	19	35	38	57	48	48	63
Rate	October	764	802	797	780	784	784	775
	December	n/a	n/a	511	435	463	463	397

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



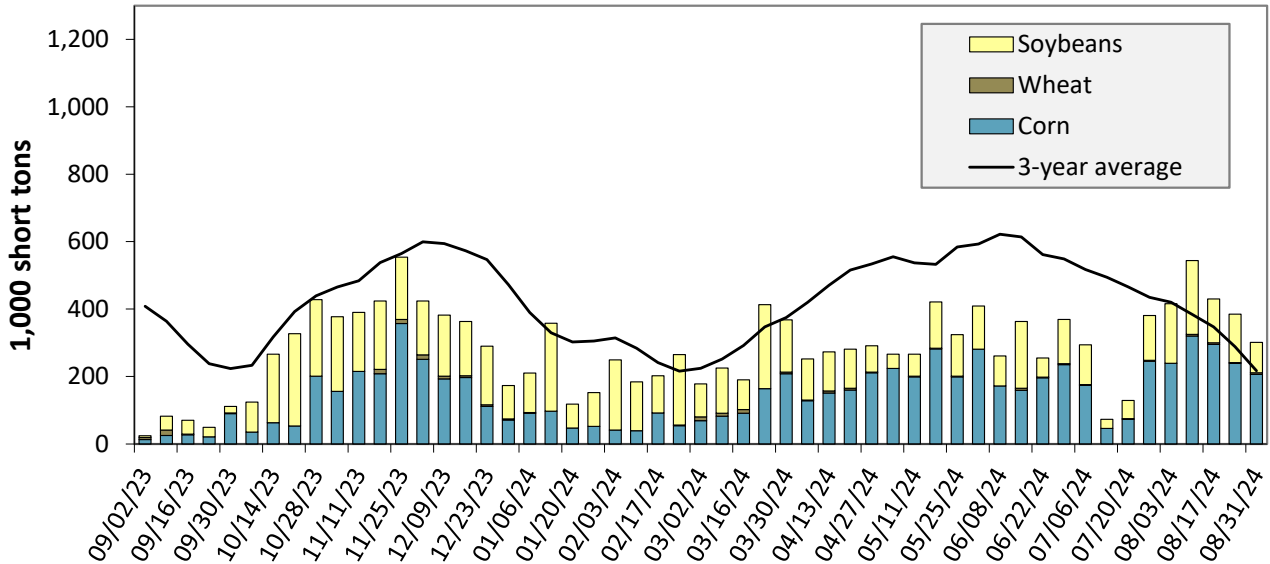
Calculating barge rate per ton:

$$\text{Rate} \times \text{1976 tariff benchmark rate per ton} / 100$$

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 31: 1,154 percent higher than last year and 39 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.

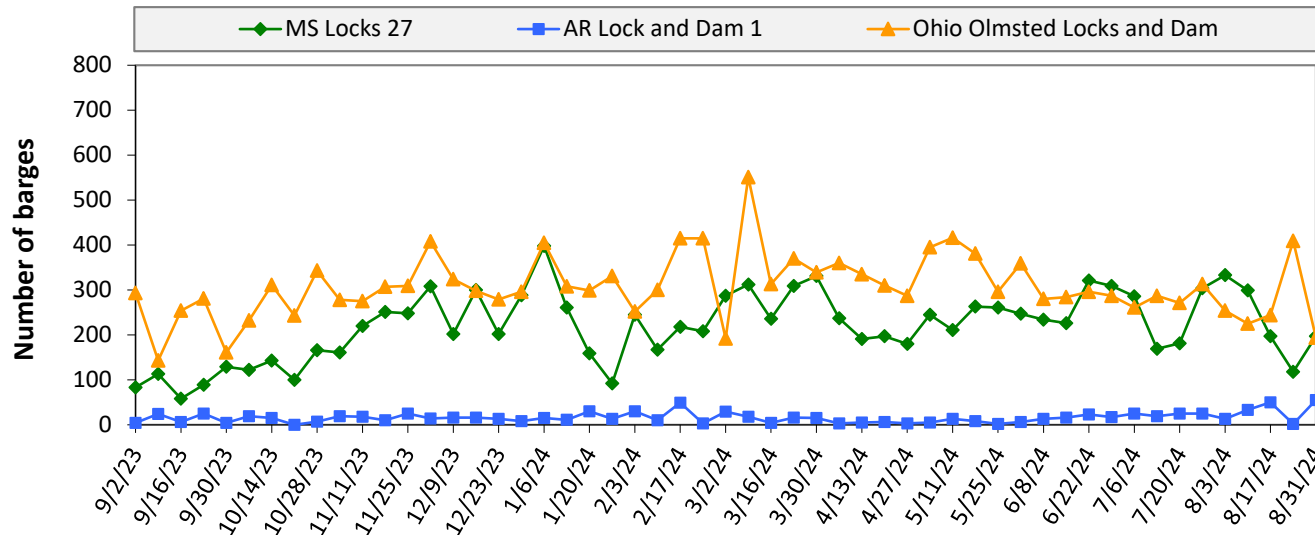
Table 10. Barged grain movements (1,000 tons)

For the week ending 08/31/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	55	0	26	0	82
Mississippi River (Winfield, MO (L25))	158	8	62	0	228
Mississippi River (Alton, IL (L26))	202	5	90	0	297
Mississippi River (Granite City, IL (L27))	206	5	90	0	300
Illinois River (La Grange)	78	0	43	0	120
Ohio River (Olmsted)	100	24	32	5	161
Arkansas River (L1)	0	0	20	0	20
Weekly total - 2024	305	29	141	5	481
Weekly total - 2023	27	38	58	0	122
2024 YTD	10,053	1,223	6,983	170	18,430
2023 YTD	8,785	1,032	7,168	200	17,185
2024 as % of 2023 YTD	114	119	97	85	107
Last 4 weeks as % of 2023	604	127	171	284	294
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.

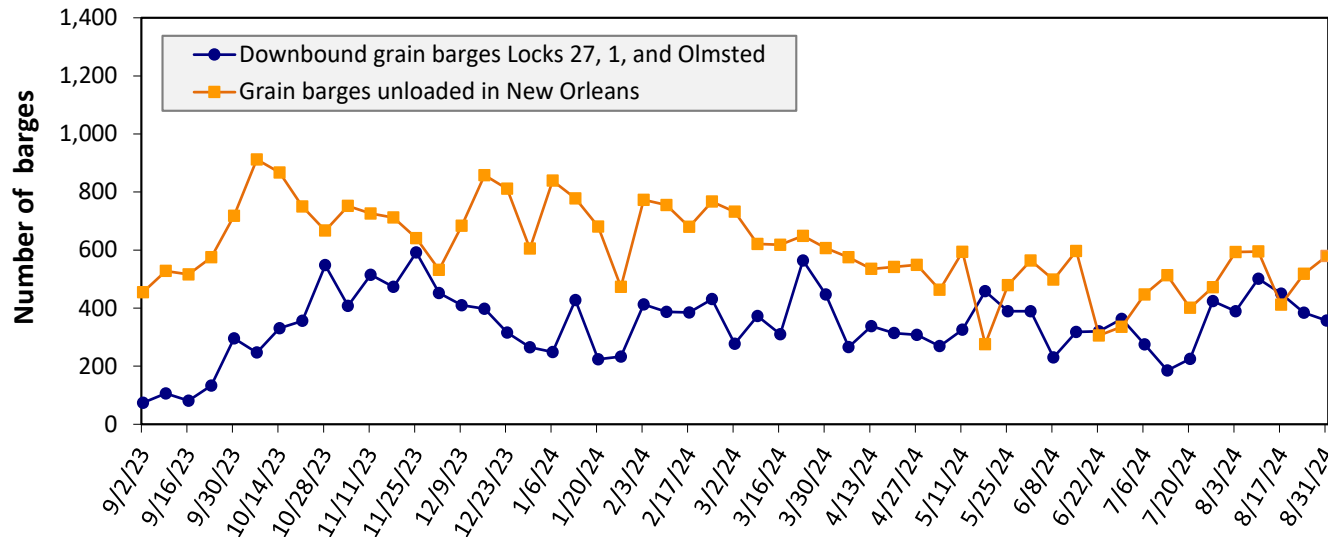
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 31: 446 barges transited the locks, 83 barges fewer than the previous week, and 1 percent lower 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 31: 357 barges moved down river, 27 fewer than the previous week; 579 grain barges unloaded in the New Orleans Region, 12 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.

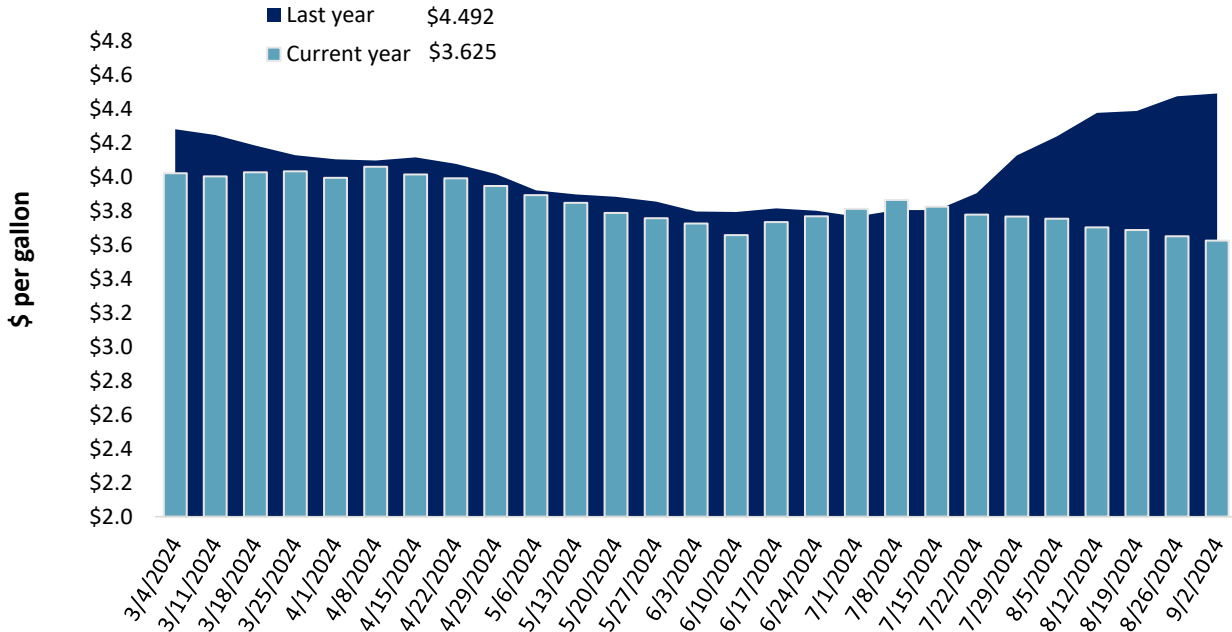
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 9/2/2024 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.686	-0.039	-0.788
	New England	3.919	-0.050	-0.548
	Central Atlantic	3.908	-0.012	-0.717
	Lower Atlantic	3.580	-0.048	-0.839
II	Midwest	3.613	-0.014	-0.770
III	Gulf Coast	3.265	-0.052	-0.906
IV	Rocky Mountain	3.590	-0.018	-1.137
V	West Coast	4.293	0.021	-1.097
	West Coast less California	3.896	0.003	-1.132
	California	4.749	0.042	-1.052
Total	United States	3.625	-0.026	-0.867

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 September 2, the U.S. average diesel fuel price decreased 2.6 cents from the previous week to \$3.625 per gallon, 86.7 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 8/22/2024	1,161	804	1,707	1,257	61	4,990	3,002	1,728	9,719
	This week year ago	644	776	1,405	701	116	3,641	1,644	1,581	6,866
	Last 4 wks. as % of same period 2022/23	189	108	126	165	58	139	275	160	176
Current shipped (cumulative) exports sales	2023/24 YTD	1,266	840	1,524	1,233	100	4,962	52,949	43,939	101,849
	2022/23 YTD	721	1,089	1,281	748	24	3,864	38,954	51,693	94,511
	YTD 2023/24 as % of 2022/23	175	77	119	165	0	128	136	85	108
	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 8/22/2024	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	4,893	22,531	15,350	47	15,445
China	0	2,822	7,585	-63	14,427
Japan	1,140	11,090	6,935	60	9,283
Colombia	444	6,358	2,476	157	3,592
Korea	63	2,415	822	194	1,938
Top 5 importers	6,540	45,216	33,168	36	44,685
Total U.S. corn export sales	9,419	55,951	40,598	38	55,397
% of YTD current month's export projection	16%	98%	96%	-	-
Change from prior week	1,494	15	72	-	-
Top 5 importers' share of U.S. corn export sales	69%	81%	82%	-	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 8/22/2024	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	2894	24,518	31,377	-22	32,321
Mexico	940	4,829	4,641	4	4,912
Egypt	360	1,451	1,150	26	2,670
Japan	221	2,196	2,358	-7	2,259
Indonesia	125	2,229	1,876	19	1,973
Top 5 importers	4,540	35,223	41,401	-15	44,133
Total U.S. soybean export sales	10,158	45,666	53,275	-14	56,656
% of YTD current month's export projection	20%	99%	99%	-	-
Change from prior week	2,616	-144	-51	-	-
Top 5 importers' share of U.S. soybean export sales	45%	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 08/22/2024	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	1,666	1,393	20	3,298
Philippines	1,291	1,150	12	2,494
Japan	844	883	-4	2,125
China	139	272	-49	1,374
Korea	944	500	89	1,274
Taiwan	451	454	-1	921
Nigeria	198	104	90	920
Thailand	298	156	92	552
Colombia	208	144	44	522
Vietnam	248	131	89	313
Top 10 importers	6,287	5,187	21	13,792
Total U.S. wheat export sales	9,951	7,505	33	18,323
% of YTD current month's export projection	44%	39%	-	-
Change from prior week	532	329	-	-
Top 10 importers' share of U.S. wheat export sales	63%	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)

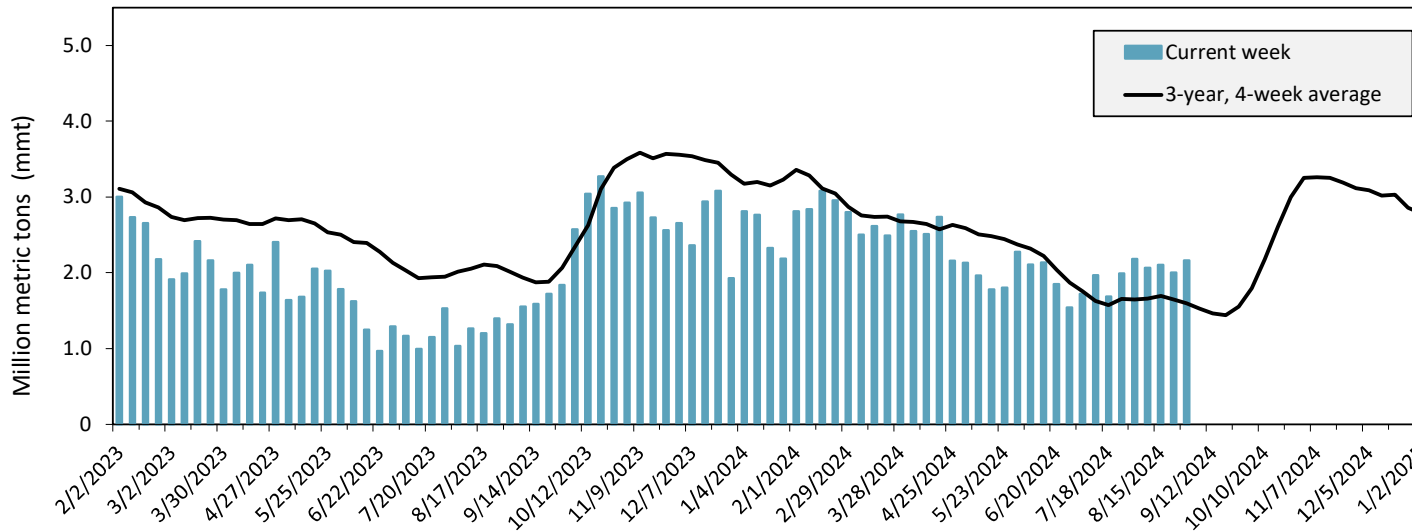
Port regions	Commodity	For the week ending 08/29/2024	Previous week*	Current week as % of previous	2024 YTD*	2023 YTD*	2024 YTD as % of 2023 YTD	Last 4-weeks as % of:		2023 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	63	77	81	11,642	3,983	292	n/a	355	5,267
	Soybeans	68	68	100	2,669	3,356	80	n/a	72	10,286
	Wheat	342	300	114	7,609	6,432	118	172	122	9,814
	All Grain	473	445	106	23,006	13,966	165	261	139	25,913
Mississippi Gulf	Corn	691	555	125	18,154	16,799	108	196	149	23,630
	Soybeans	320	196	163	13,257	14,438	92	101	92	26,878
	Wheat	108	150	72	3,480	2,449	142	135	82	3,335
	All Grain	1,119	901	124	34,951	33,686	104	150	120	53,843
Texas Gulf	Corn	11	30	38	371	229	162	88	81	397
	Soybeans	0	0	n/a	0	50	0	n/a	n/a	267
	Wheat	7	42	17	1,159	1,298	89	520	93	1,593
	All Grain	139	188	74	4,196	3,584	117	143	130	5,971
Interior	Corn	200	255	78	9,190	6,217	148	170	176	10,474
	Soybeans	109	155	70	4,760	3,651	130	154	145	6,508
	Wheat	119	23	511	2,034	1,588	128	130	118	2,281
	All Grain	431	435	99	16,133	11,555	140	155	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	0	n/a	292	192	152	108	103	581
	All Grain	0	0	n/a	310	244	127	108	79	831
Atlantic	Corn	0	0	n/a	213	82	259	182	39	166
	Soybeans	0	0	n/a	440	1,189	37	8	9	2,058
	Wheat	2	35	7	65	79	82	475	205	101
	All Grain	2	36	7	717	1,350	53	146	91	2,325
All regions	Corn	965	918	105	39,569	27,343	145	209	165	40,004
	Soybeans	497	420	118	21,198	22,817	93	122	99	46,459
	Wheat	578	549	105	14,640	12,040	122	166	110	17,738
	All Grain	2,164	2,004	108	79,367	64,502	123	167	131	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.

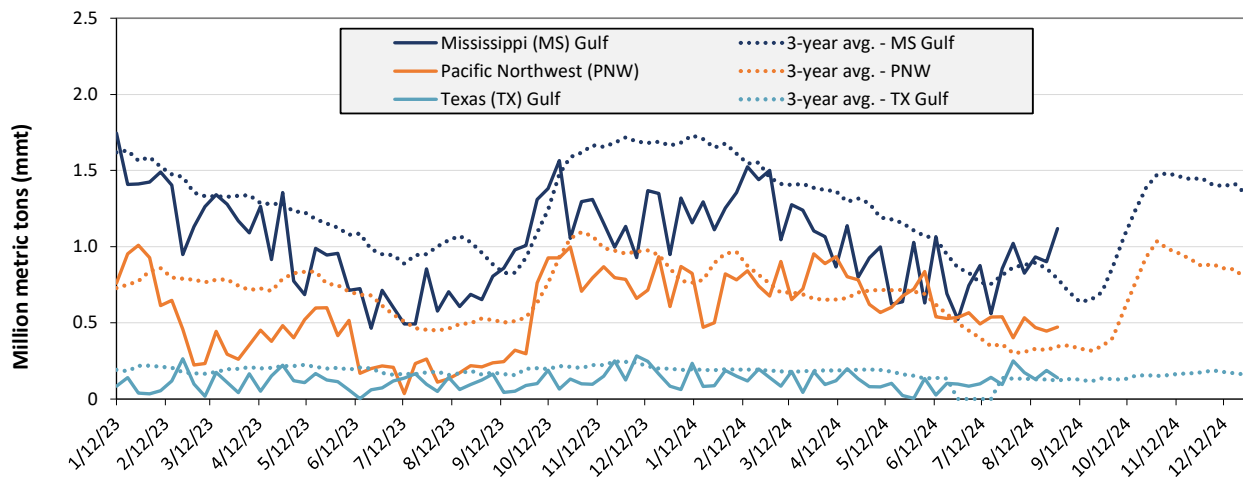
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 29: 2.2 mmt of grain inspected, up 8 percent from the previous week, up 72 percent from the same week last year, and up 36 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 08/29/24 inspections (mmt):

MS Gulf: 1.12

PNW: 0.47

TX Gulf: 0.14

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 24	down 26	up 16	up 6
Last year (same 7 days)	up 63	up 13	up 55	up 362
3-year average (4-week moving average)	up 42	up 15	up 38	up 37

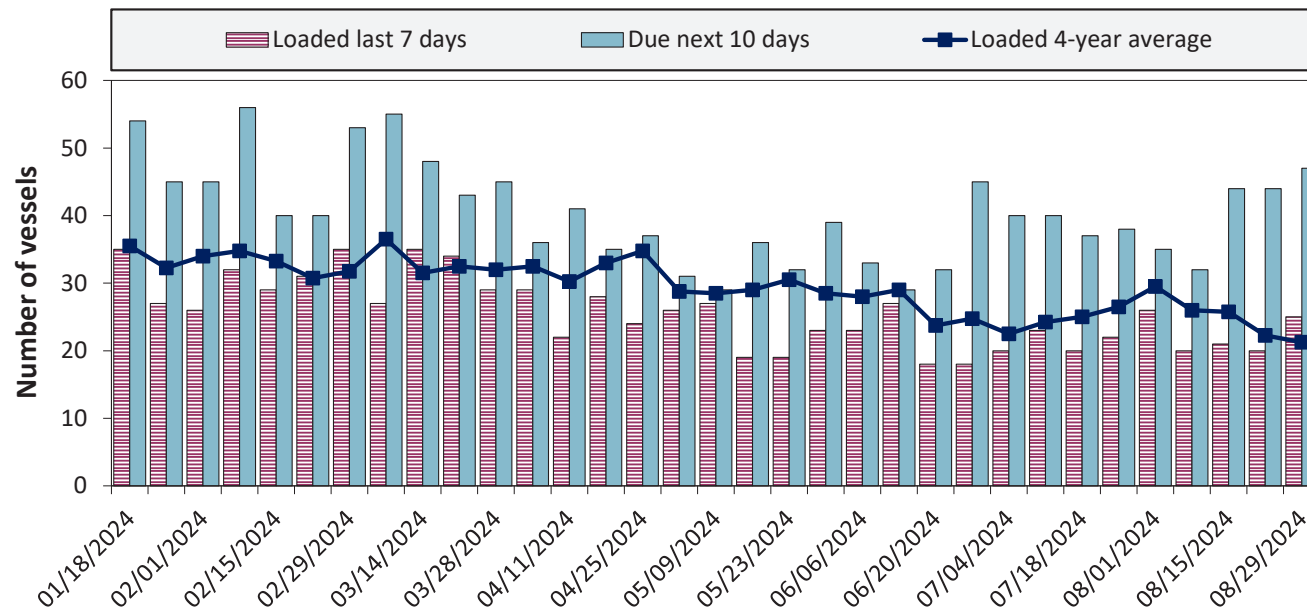
Source: USDA, Federal Grain Inspection Service.

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
8/29/2024	24	25	47	8
8/22/2024	17	20	44	12
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.

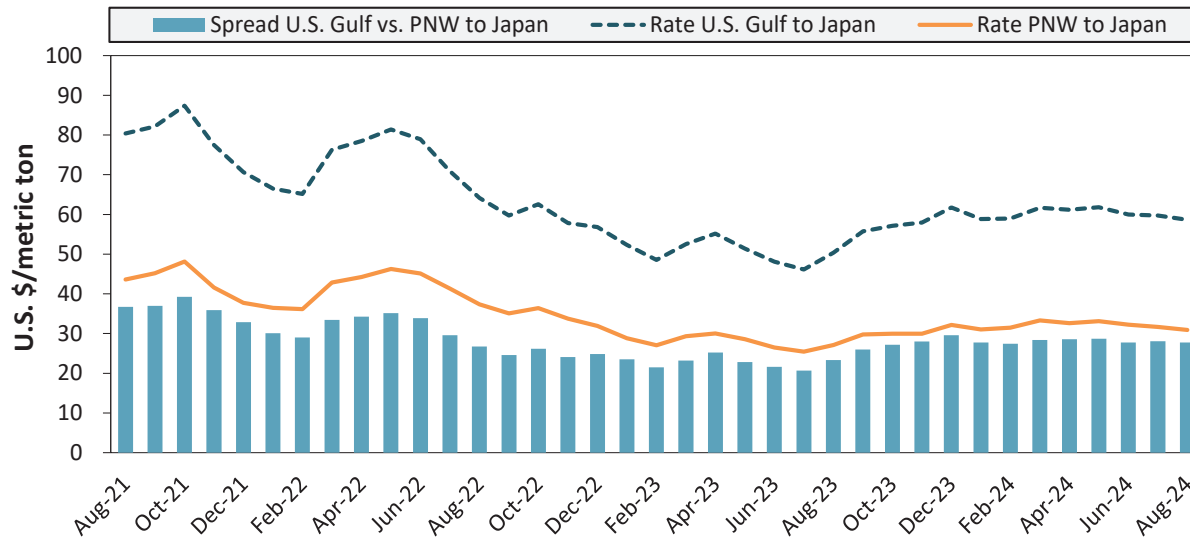
Figure 17. U.S . Gulf vessel loading activity



Week ending 8/29/24, number of vessels	Loaded	Due
Change from last year	9%	12%
Change from 4-year average	18%	19%

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
August 2024	\$59	\$31	\$28
Change from August 2023	16%	14%	19%
Change from 4-year average	-2%	-6%	4%

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

Table 18. Ocean freight rates for selected shipments, week ending 08/31/2024

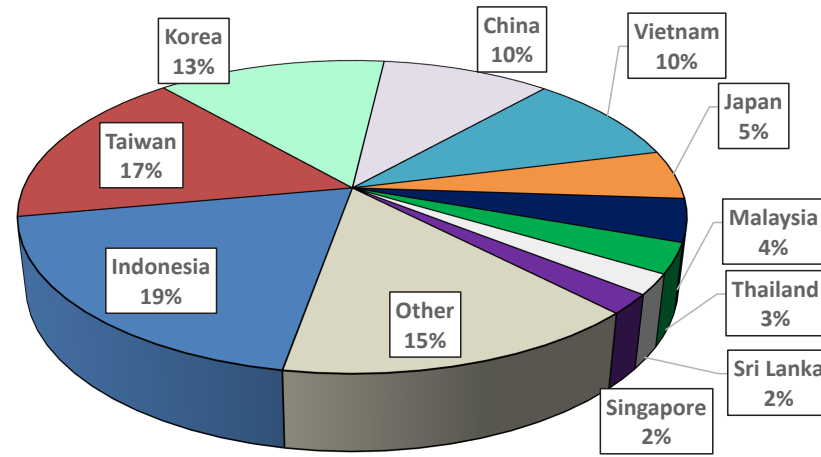
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	Mar 20, 2024	Apr 1/5, 2024	50,000	69.50
U.S. Gulf	China	Heavy grain	26-Aug-24	Sept 1/Oct 1, 2024	58,000	60.50
U.S. Gulf	N. China	Heavy grain	Aug 20, 2024	Sept 15/Oct 15, 2024	68,000	57.00
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	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
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.

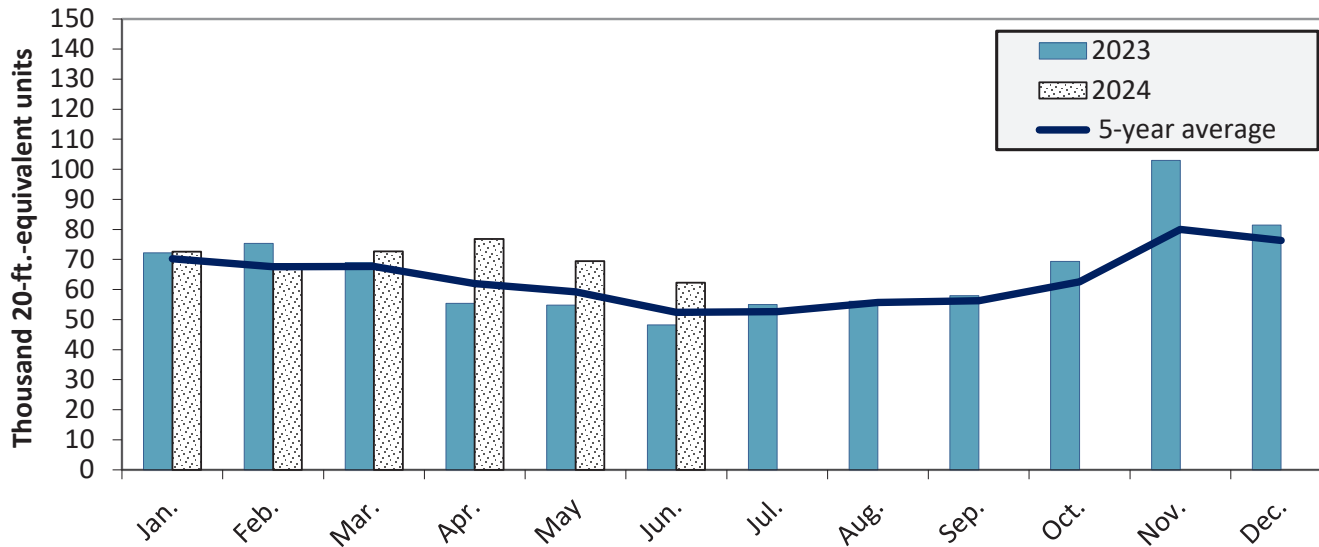
Figure 19. Top 10 destination markets for U.S. containerized grain exports, Jan-Jun 2024



Note: The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.

Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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



Containerized grain shipments in Jun. 2024 were up 29.0 percent from last year and up 18.8 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.

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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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