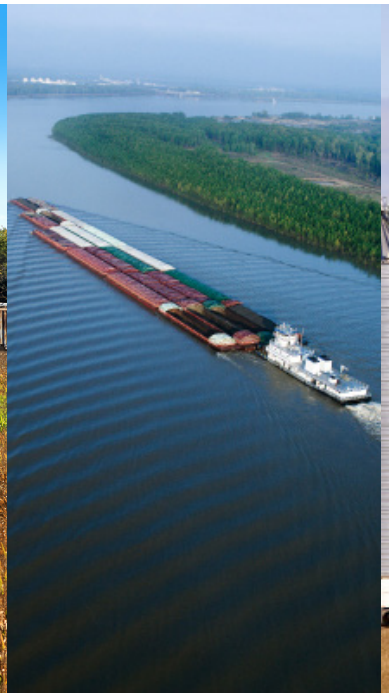
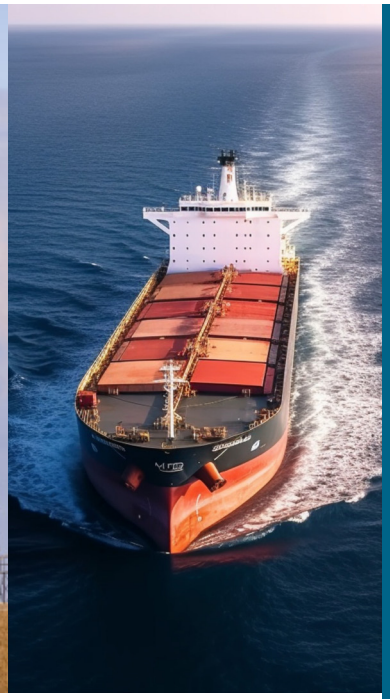
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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Low Water Levels on the Mississippi River System Affecting Barge Grain Movements. As of September 12, barge operators have reduced drafts and tow sizes on the Lower Mississippi River to accommodate low water. Most operators have reduced drafts to 9.5 feet on the Ohio River; to 10 feet from St. Louis, MO, to Greenville, MS; and to 10.5 feet from Greenville, MS, to the Gulf. From St. Louis to the Gulf, tow size is down 14-25 percent (or 5-10 barges per tow), and transit delays of 1 to 2 days are expected.

Barge groundings have become common near the Memphis area. On September 8, rolling 24-hour closures will begin on the Lower Mississippi River in the Vicksburg District, so that dredges can create a channel for barges to pass through.

Rain from Hurricane Francine may bring temporary relief to the Mississippi River System. However, the impending hurricane has closed most facilities south of Caro, IL. Normal operations (including the flow of empty barges out of the Gulf) are not expected to resume until at least late this week, depending on the level of damage.

Diesel Price Drops for 9th Consecutive Week. From the week ending July 8 to the week ending September 9, the U.S. average diesel price dropped a total of 31 cents per gallon (including 7.0 cents since last week) to $3.555 per gallon. For the week ending September 9, the U.S. average diesel fuel price was 98.5 cents below the same week last year. The largest regional drop from last week—8.5 cents per gallon—was in the Midwest.

This week also marked the lowest price since the October 11, 2021, price of $3.586 per gallon. The drop in diesel prices stems from falling oil prices, which are driven by market concerns about slowing economies and oil demand, particularly in China. According to the Energy Information Administration's (EIA) September *Short-Term Energy Outlook*, EIA expects oil prices to top $80 per barrel this month and to average $82 per barrel in fourth quarter 2024 and $84 per barrel in 2025.

With production increases by OPEC+ delayed from October until December, more oil is expected to be withdrawn from global inventories in fourth quarter 2024. EIA expects the U.S. diesel price to average $3.61 per gallon in fourth quarter 2024—down 10 cents from the previous quarter.

After FMC Review, Maersk and Hapag-Lloyd Begin Sharing Vessels. Effective September 9, following a review by the Federal Maritime Commission (FMC), the Gemini Cooperation Agreement between Maersk A/S and Hapag-Lloyd now allows the carriers to share vessels in trade lanes that connect the United States to Asia, the Middle East, and Europe.

By existing law (46 U.S.C. 41307), FMC will continue to assess whether the agreement is likely, by reducing competition, to cause either an unreasonable rise in transportation costs or diminished transportation service. If the agreement is found to cause either problem, FMC's only remedy is to seek an injunction in Federal district court. The Commission has not determined to seek an injunction against the Gemini Cooperation Agreement at this time.

Like all carrier alliance agreements, the Gemini Cooperation Agreement will be subject to extensive, continuous FMC monitoring, which begins immediately. The FMC chair said he has "questions and concerns" about whether the agreement "has, or will, result in anti-competitive consequences that violate the Shipping Act."

Louisiana and Mississippi Temporarily Waive Trucking Regulations. On September 10, responding to disruptions caused by Hurricane Francine, Louisiana and Mississippi temporarily waived hours-of-service (HOS) regulations for vehicles transporting fuel, including propane. Mississippi's waiver is effective for 14 days or until the end of the emergency, whichever is earlier. Louisiana's waiver is effective until September 23 or the end of the emergency, whichever is earlier.

On September 9, Louisiana also enacted an emergency order that waives toll payments, as well as standard size and weight (not exceeding 88,000 pounds) restrictions for commercial motor vehicles providing emergency relief. Effective until amended, modified, or rescinded, the waiver applies on public highways (excluding interstate highways or non-State-maintained highways) in Louisiana.

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 29, **unshipped balances** of corn and soybeans for marketing year (MY) 2023/24 totaled 2.78 million metric tons (mmt), down 41 percent from last week and up 19 percent from the same time last year. The **unshipped balance** of wheat for MY 2024/25 was 4.69 mmt, down 6 percent from last week and up 27 percent from the same time last year.

Net **corn export sales** for MY 2023/24 were –0.17 mmt, down significantly from last week. Net **soybean export sales** were –0.23 mmt, down 59 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.34 mmt, down 36 percent from last week.

Rail

U.S. Class I railroads originated 23,845 **grain carloads** during the week ending August 31. This was an 8-percent increase from the previous week, 34 percent more than last year, and 22 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $275 above tariff for the week ending September 5. This was $74 more than last week and $283 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $338 above tariff. This was $63 less than last week and $200 more than this week last year.

Barge

For the week ending September 7, **barged grain movements** totaled 394,594 tons. This was 18 percent less than the previous week and 128 percent more than the same period last year.

For the week ending September 7, 266 grain barges **moved down river**—91 fewer than last week. There were 464 grain barges **unloaded** in the New Orleans region, 20 percent fewer than last week.

Ocean

For the week ending September 5, 24 **oceangoing grain vessels** were loaded in the Gulf—4 percent fewer than the same period last year. Within the next 10 days (starting September 6), 50 vessels were expected to be loaded—52 percent more than the same period last year.

As of September 5, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $56.00, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $30.00 per mt, unchanged from the previous week.

Second Quarter 2024 Soybean Transportation Costs In United States and Brazil

The world's two leading producers of soybeans, the United States and Brazil, have long competed for the same major overseas markets—namely, China and Europe. Given China's and Europe's positions as top soybean importers, low transportation and landed costs of soybeans to these destinations are essential to the competitiveness of both the United States and Brazil. This article compares quarterly and yearly changes in the costs of moving soybeans from the United States and Brazil to Shanghai, China (table 1), and to Hamburg, Germany (table 2).

Quarter-to-quarter transportation costs. From first quarter 2024 to second quarter 2024 (quarter to quarter), costs for exporting U.S. soybeans through the U.S. Gulf to China (table 1) and Germany (table 2) decreased, as rates typically do when the Upper Mississippi River re-opens in the spring. After being closed for most of the first quarter, the Upper Mississippi River reopened in mid-March for navigation to New Orleans.

Costs to ship soybeans through the Pacific Northwest (PNW) to China slightly increased (table 1). Truck rates rose for all U.S. routes. Brazil's costs for exporting soybeans—to China and Germany—fell in response to lower truck and ocean freight rates.

Year-to-year transportation costs. From second quarter 2023 to second quarter 2024 (year to year), transportation costs increased for shipments from the United States to China, but decreased for shipments to Europe. For U.S.-to-China shipments, higher truck and ocean freight rates pushed up total transportation costs, outweighing the effect of lower barge and rail tariff rates.

For shipments from Brazil, transportation costs decreased year to year in response to lower truck and ocean rates.

Quarter-to-quarter landed costs. Quarter to quarter, landed costs fell in the United States, but rose in Brazil. For shipping through the U.S. Gulf, landed-cost decreases reflected both falling transportation costs and falling farm values. However, for shipping through PNW, lower farm values pushed down landed costs. In second quarter 2024, transportation comprised 18-22 percent of U.S. landed costs for shipping to China (table 1) and 13-14 percent for shipping to Germany (table 2).

In Brazil, landed costs rose because of higher farm values that outweighed lower transportation costs. Transportation comprised 19-25 percent of Brazil's total landed costs for shipments to China (table 1) and Germany (table 2).

Year-to-year landed costs. Year to year, landed costs fell in both countries. For exports from the United States to China, the decrease reflected lower soybean farm values that outweighed increases in transportation costs. For exports from the United States to Germany, the decrease included lower transportation costs, but primarily reflected lower farm values.

For exports from Brazil, landed costs fell in response to falling transportation costs and farm values.

U.S. and Brazilian soybean exports. According to USDA/Foreign Agricultural Service's Global Agricultural Trade System data, China imported 0.74 million metric tons (mmt) of U.S. soybeans in second quarter 2024, which was down 0.63 mmt from quarter to quarter and unchanged year to year. According to the August 2024 *World Agriculture Supply and Demand Estimates (WASDE)*, total U.S. soybean exports in marketing year (MY) 2024/25 are projected to be 50.35 mmt, up 9 percent from MY 2023/24.

Brazil's soybean exports are projected at 105 mmt, unchanged from MY 2023/24. For more on soybean transportation, see *Brazil Soybean Transportation*.

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Table 1. Quarterly costs of transporting soybeans from United States and Brazil to Shanghai, China

Route	Cost	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change		2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--$/mt--					--$/mt--				
United States via U.S. Gulf	Truck	14.19	16.11	16.47	16.07	2.23	14.19	16.11	16.47	16.07	2.23
	Rail	-	42.78	-	-	-	-	39.17	-	-	-
	Barge	29.54	13.63	24.29	-17.77	78.21	21.93	13.63	19.18	-12.54	40.72
	Ocean	50.70	58.99	59.66	17.67	1.14	50.70	58.99	59.66	17.67	1.14
	Total transportation	94.43	131.51	100.42	6.34	-23.64	86.82	127.90	95.31	9.78	-25.48
	Farm value	519.31	433.58	417.65	-19.58	-3.67	532.78	440.92	437.25	-17.93	-0.83
	Landed cost	613.74	565.09	518.07	-15.59	-8.32	619.60	568.82	532.56	-14.05	-6.37
	Transport % of landed cost	15.39	23.27	19.38	4.00	-3.89	14.01	22.49	17.90	3.88	-4.59
Route	Cost	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change		2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Fargo, ND					Sioux Falls, SD				
		--$/mt--					--$/mt--				
United States via PNW	Truck	14.19	16.11	16.47	16.07	2.23	14.19	16.11	16.47	16.07	2.23
	Rail	65.91	64.96	64.86	-1.59	-0.15	67.38	66.33	66.22	-1.72	-0.17
	Ocean	27.85	31.44	31.77	14.08	1.05	27.85	31.44	31.77	14.08	1.05
	Total transportation	107.95	112.51	113.10	4.77	0.52	109.42	113.88	114.46	4.61	0.51
	Farm value	499.71	420.10	400.51	-19.85	-4.66	522.99	433.58	420.10	-19.67	-3.11
	Landed cost	607.66	532.61	513.61	-15.48	-3.57	632.41	547.46	534.56	-15.47	-2.36
	Transport % of landed cost	17.76	21.12	22.02	4.26	0.90	17.30	20.80	21.41	4.11	0.61
Route	Cost	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change		2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--$/mt--					--$/mt--				
Brazil	Truck	100.36	91.79	91.10	-9.23	-0.75	59.45	54.67	53.05	-10.77	-2.96
	Ocean	35.20	34.70	33.30	-5.40	-4.03	36.70	36.20	34.80	-5.18	-3.87
	Total transportation	135.56	126.49	124.40	-8.23	-1.65	96.15	90.87	87.85	-8.63	-3.32
	Farm Value	384.93	349.39	366.79	-4.71	4.98	390.39	353.29	367.50	-5.86	4.02
	Landed Cost	520.49	475.88	491.19	-5.63	3.22	486.54	444.16	455.35	-6.41	2.52
	Transport % of landed cost	26.04	26.58	25.33	-0.72	-1.25	19.76	20.46	19.29	-0.47	-1.17

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Second quarter rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation costs plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Source: USDA, Agricultural Marketing Service.

Table 2. Quarterly costs of transporting soybeans from United States and Brazil to Hamburg, Germany

Route	Cost	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change		2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--$/mt--					--$/mt--				
United States via U.S. Gulf	Truck	14.19	16.11	16.47	16.07	2.23	14.19	16.11	16.47	16.07	2.23
	Rail	-	42.78	-	-	-	-	39.17	-	-	-
	Barge	29.54	13.63	24.29	-17.77	78.21	21.93	13.63	19.18	-12.54	40.72
	Ocean	27.98	29.76	27.94	-0.14	-6.12	27.98	29.76	27.94	-0.14	-6.12
	Total transportation	71.71	102.28	68.70	-4.20	-32.83	64.10	98.67	63.59	-0.80	-35.55
	Farm value	519.31	433.58	417.65	-19.58	-3.67	532.78	440.92	437.25	-17.93	-0.83
	Landed cost	591.02	535.86	486.35	-17.71	-9.24	596.88	539.59	500.84	-16.09	-7.18
	Transport % of landed cost	12.13	19.09	14.13	1.99	-4.96	10.74	18.29	12.70	1.96	-5.59
Route	Cost	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change		2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--$/mt--					--$/mt--				
Brazil	Truck	100.36	91.79	91.10	-9.23	-0.75	59.45	54.67	53.05	-10.77	-2.96
	Ocean	33.20	32.60	31.30	-5.72	-3.99	32.50	32.20	31.00	-4.62	-3.73
	Total transportation	133.56	124.39	122.40	-8.36	-1.60	91.95	86.87	84.05	-8.59	-3.25
	Farm Value	384.93	349.39	366.79	-4.71	4.98	390.39	353.29	367.50	-5.86	4.02
	Landed Cost	518.49	473.78	489.19	-5.65	3.25	482.34	440.16	451.55	-6.38	2.59
	Transport % of landed cost	25.76	26.25	25.02	-0.74	-1.23	19.06	19.74	18.61	-0.45	-1.12

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Second quarter rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation costs plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Source: USDA, Agricultural Marketing Service.

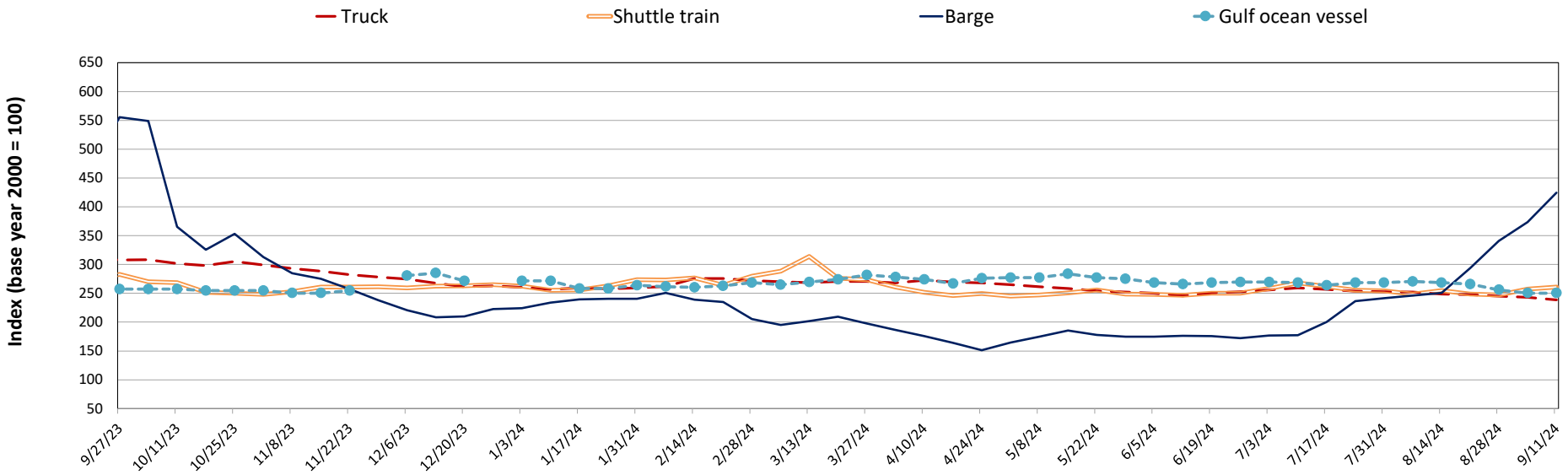
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
09/11/24	239	339	261	424	250	213
09/04/24	243	342	258	373	250	213
09/13/23	305	321	249	425	242	206

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.

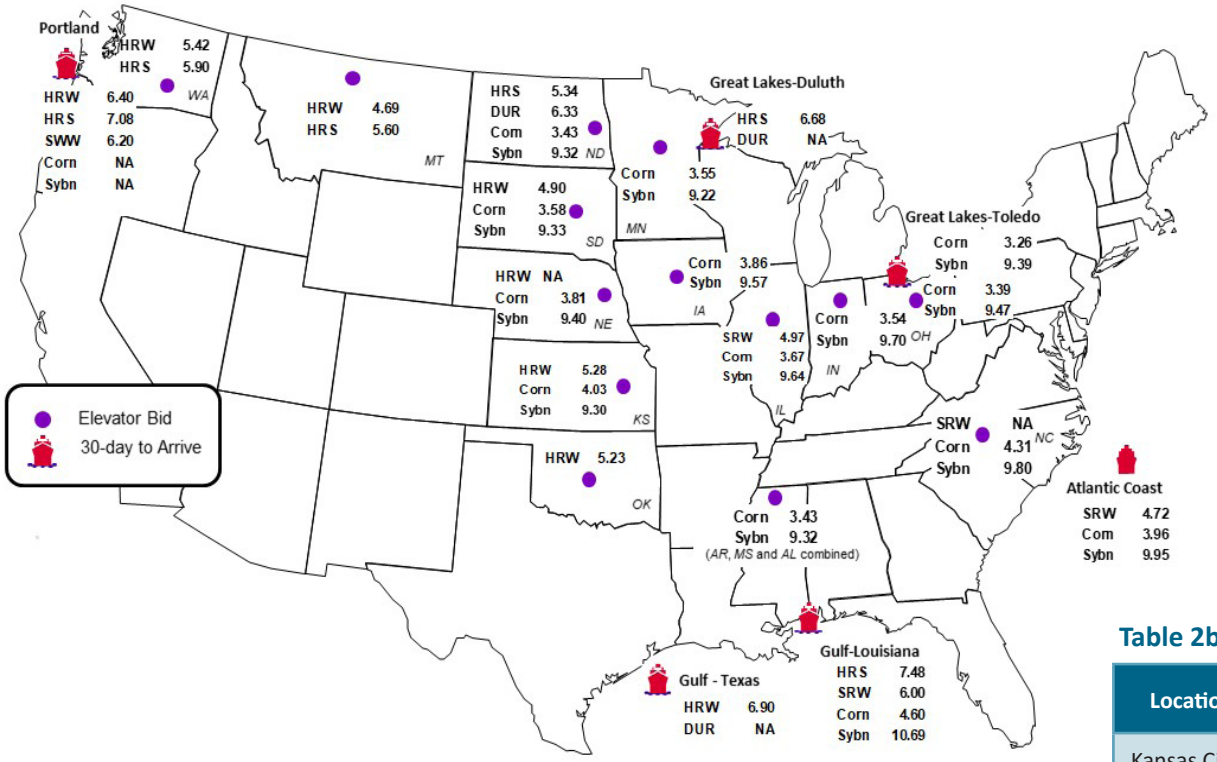
Figure 1. Grain transportation cost indicators as of week ending 09/11/24



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	9/6/2024	8/30/2024
Corn	IL–Gulf	-0.93	-0.70
Corn	NE–Gulf	-0.79	-0.58
Soybean	IA–Gulf	-1.12	-1.05
HRW	KS–Gulf	-1.62	-1.74
HRS	ND–Portland	-1.74	-1.94

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	9/6/2024	Week ago 8/30/2024	Year ago 9/8/2023
Kansas City	Wheat	Dec	5.782	5.610	7.252
Minneapolis	Wheat	Dec	6.136	6.004	7.660
Chicago	Wheat	Dec	5.672	5.494	5.924
Chicago	Corn	Dec	4.056	4.014	4.856
Chicago	Soybean	Nov	10.134	10.070	13.686

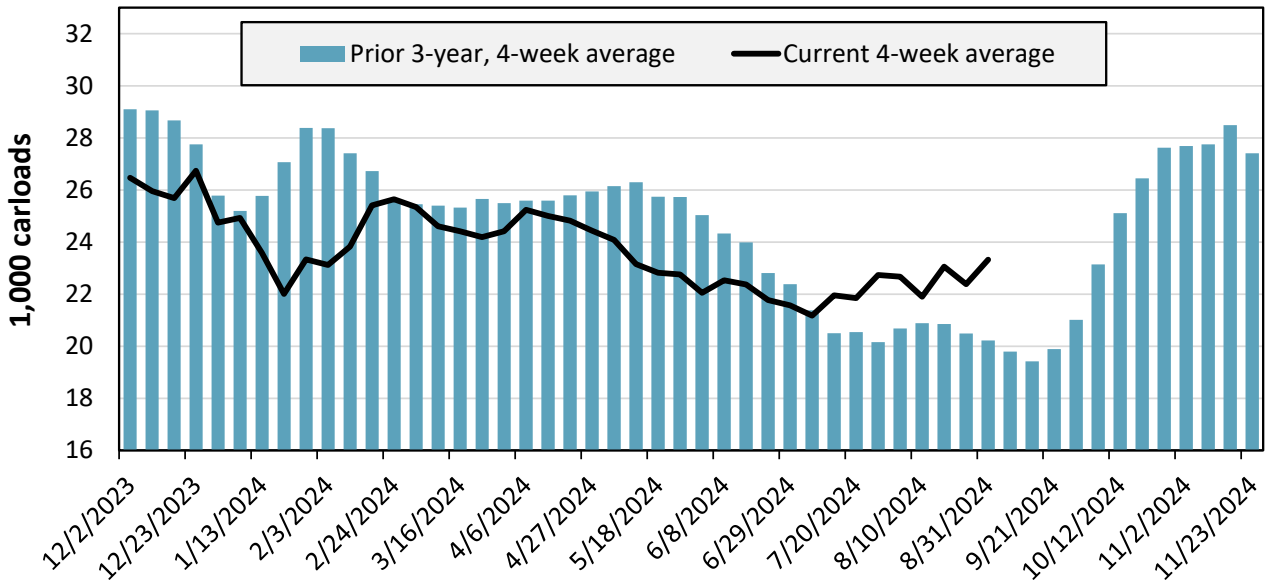
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/31/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,690	2,903	11,455	4,446	2,191	1,160	23,845
This week last year	1,407	1,625	8,092	3,837	2,121	770	17,852
2024 YTD	57,964	94,166	362,492	178,122	93,644	32,519	818,907
2023 YTD	60,868	90,647	301,731	180,624	79,115	44,027	757,012
2024 YTD as % of 2023 YTD	95	104	120	99	118	74	108
Last 4 weeks as % of 2023	139	158	137	122	100	121	130
Last 4 weeks as % of 3-yr. avg.	119	148	122	98	105	106	115
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



Source: Surface Transportation Board.

For the 4 weeks ending August 31, grain carloads were up 4 percent from the previous week, up 30 percent from last year, and up 15 percent from the 3-year average.

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

For the week ending: 8/31/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	21.6	31.4	14.4	25.0	14.5	11.2	56.9	25.0
	Average over last 4 weeks	22.3	24.4	18.1	20.7	9.7	18.6	46.4	22.9
	Average of same 4 weeks last year	46.6	42.7	10.5	16.6	7.1	17.9	12.7	22.0
Grain unit train speeds (miles per hour)	This week	23.9	19.9	23.5	21.5	22.1	20.4	21.4	21.8
	Average over last 4 weeks	23.5	20.2	23.4	21.7	23.8	19.3	22.7	22.1
	Average of same 4 weeks last year	23.8	16.5	24.9	22.4	24.2	19.7	25.2	22.4

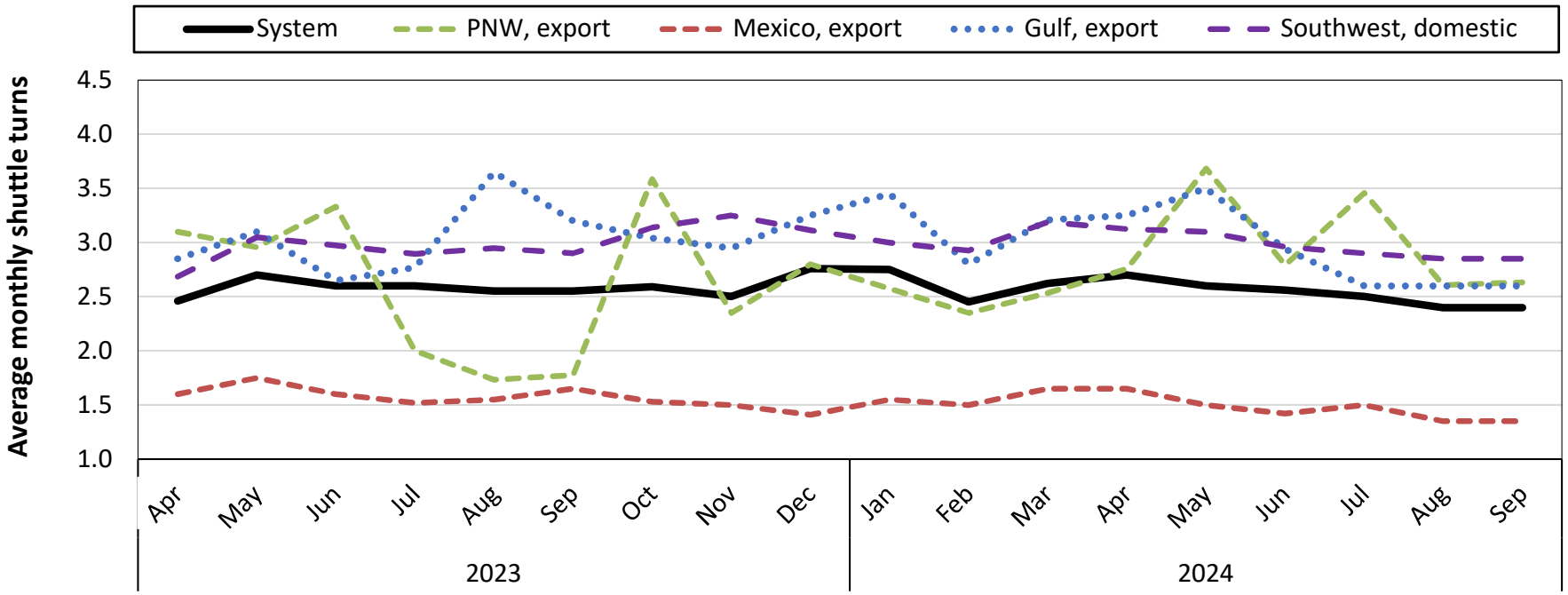
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics 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: 8/31/2024		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	24	14	380	112	1	124	145	801
	Average over last 4 weeks	19	8	407	128	4	97	112	775
	Average of same 4 weeks last year	39	14	475	58	5	73	26	691
Loaded grain cars not moved in over 48 hours (number)	This week	18	207	397	116	0	88	50	876
	Average over last 4 weeks	27	135	622	124	3	173	62	1,147
	Average of same 4 weeks last year	15	232	380	120	5	119	59	930
Grain unit trains held (number)	This week	0	0	14	8	0	4	4	31
	Average over last 4 weeks	0	0	17	7	0	5	5	34
	Average of same 4 weeks last year	0	4	7	7	0	4	6	28
Unfilled grain car orders (number)	This week	0	4	1,421	538	0	128	50	2,141
	Average over last 4 weeks	8	3	1,605	391	0	183	45	2,234
	Average of same 4 weeks last year	0	23	327	89	0	219	49	706

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

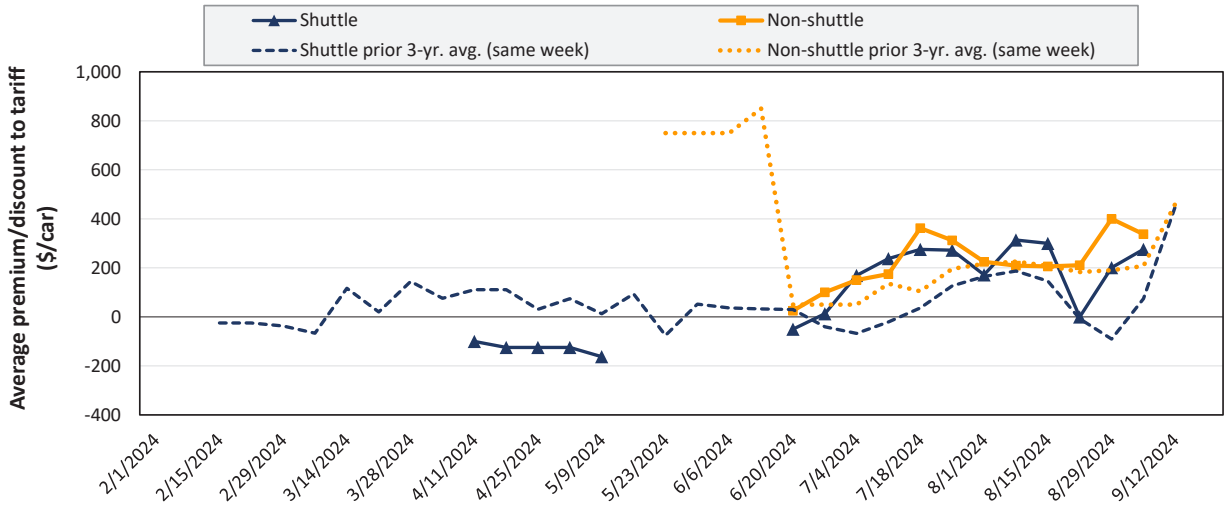


Average monthly system-wide grain shuttle turns reported in the first week of September 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.63 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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



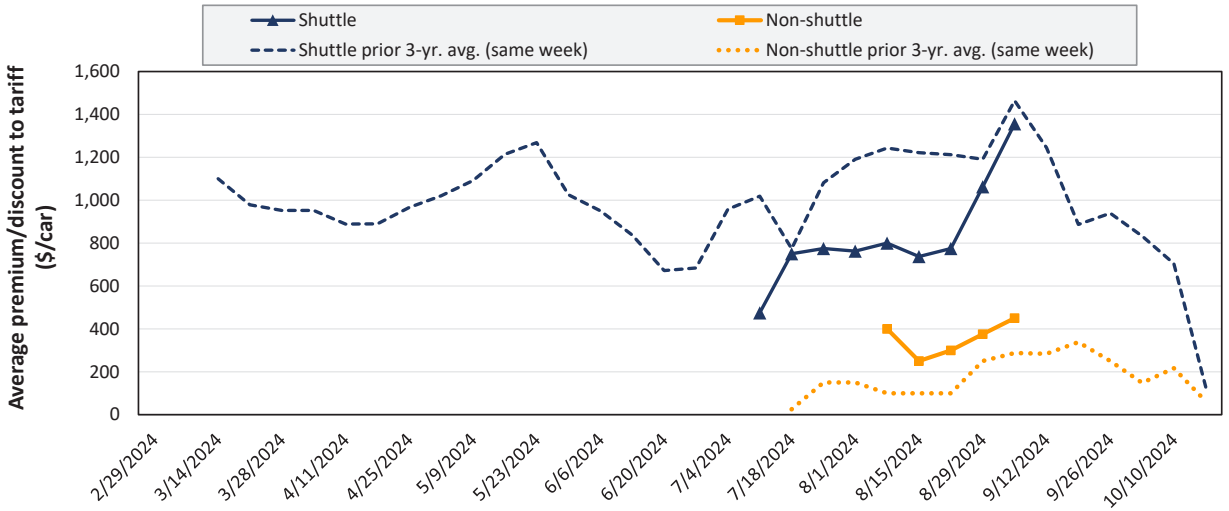
Average non-shuttle bids/offers fell $63 this week, and are $63 below the peak.

Average shuttle bids/offers rose $74 this week and are $39 below the peak.

9/5/2024	BNSF	UP
Non-Shuttle	$500	$175
Shuttle	$450	$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 October 2024



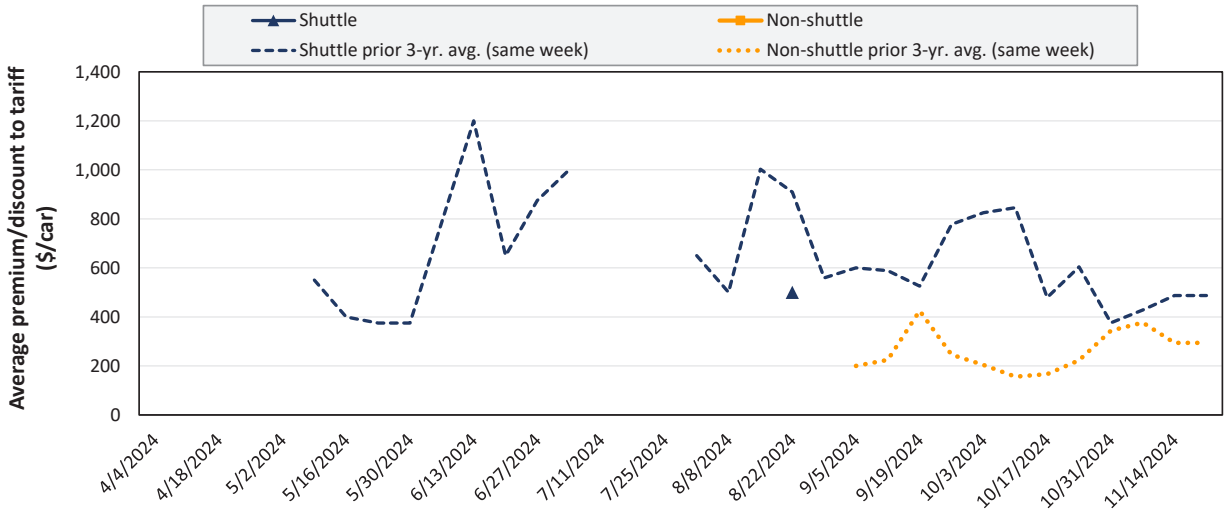
Average non-shuttle bids/offers rose $75 this week, and are at the peak.

Average shuttle bids/offers rose $294 this week and are at the peak.

9/5/2024	BNSF	UP
Non-Shuttle	$600	$300
Shuttle	$1,400	$1,313

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.

9/5/2024	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: 9/5/2024		Delivery period					
		Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25
Non-shuttle	BNSF	500	600	n/a	n/a	n/a	n/a
	Change from last week	-50	100	n/a	n/a	n/a	n/a
	Change from same week 2023	375	n/a	n/a	n/a	n/a	n/a
	UP	175	300	n/a	n/a	n/a	n/a
	Change from last week	-75	50	n/a	n/a	n/a	n/a
	Change from same week 2023	25	175	n/a	n/a	n/a	n/a
Shuttle	BNSF	450	1,400	n/a	n/a	n/a	n/a
	Change from last week	156	175	n/a	n/a	n/a	n/a
	Change from same week 2023	100	222	n/a	n/a	n/a	n/a
	UP	100	1,313	n/a	n/a	n/a	n/a
	Change from last week	-8	413	n/a	n/a	n/a	n/a
	Change from same week 2023	467	350	n/a	n/a	n/a	n/a
	CPKC	500	500	n/a	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2023	500	0	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

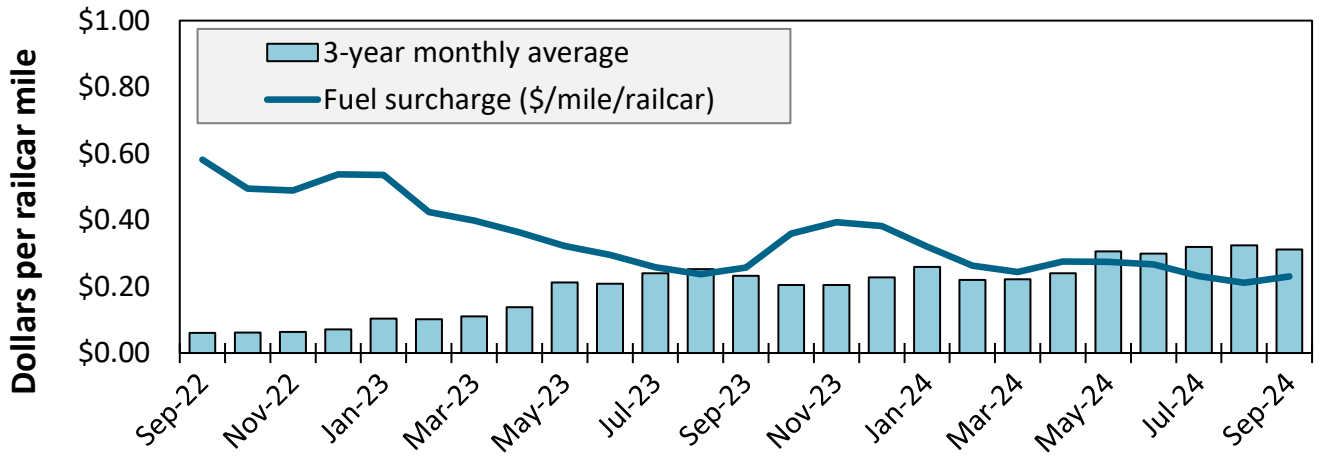
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel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

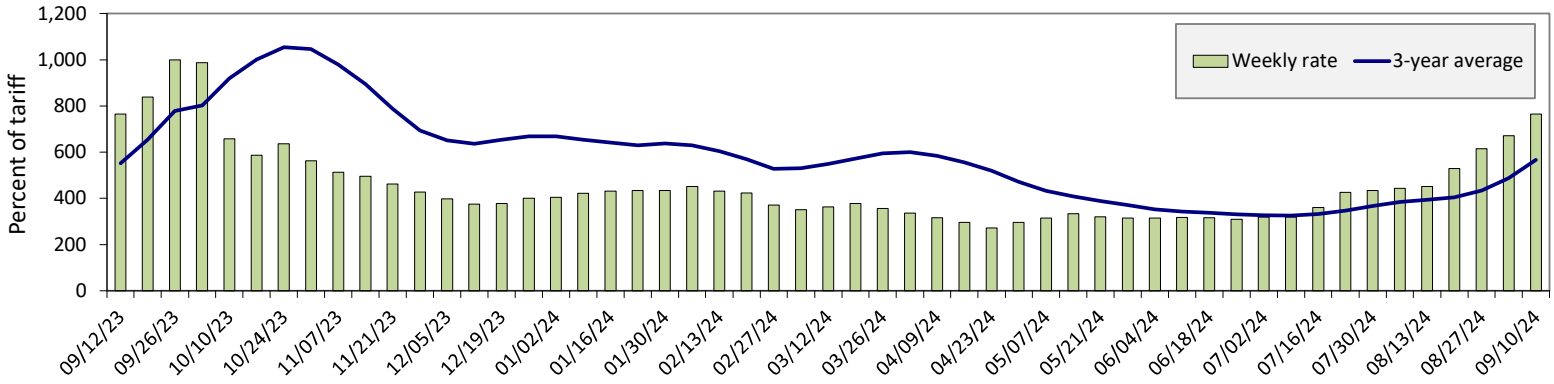
Figure 8. Railroad fuel surcharges, North American weighted average



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.

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 September 10: 14 percent higher than the previous week; there is no change from last year; and 35 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	9/10/2024	714	758	764	794	778	778	808
	9/3/2024	659	680	672	689	701	701	766
$/ton	9/10/2024	44.20	40.33	35.45	31.68	36.49	31.43	25.37
	9/3/2024	40.79	36.18	31.18	27.49	32.88	28.32	24.05
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	-13	2	-0	10	5	5	-1
	3-year avg.	15	30	35	53	39	39	44
Rate	October	752	815	819	817	816	816	784
	December	n/a	n/a	532	454	469	469	417

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.

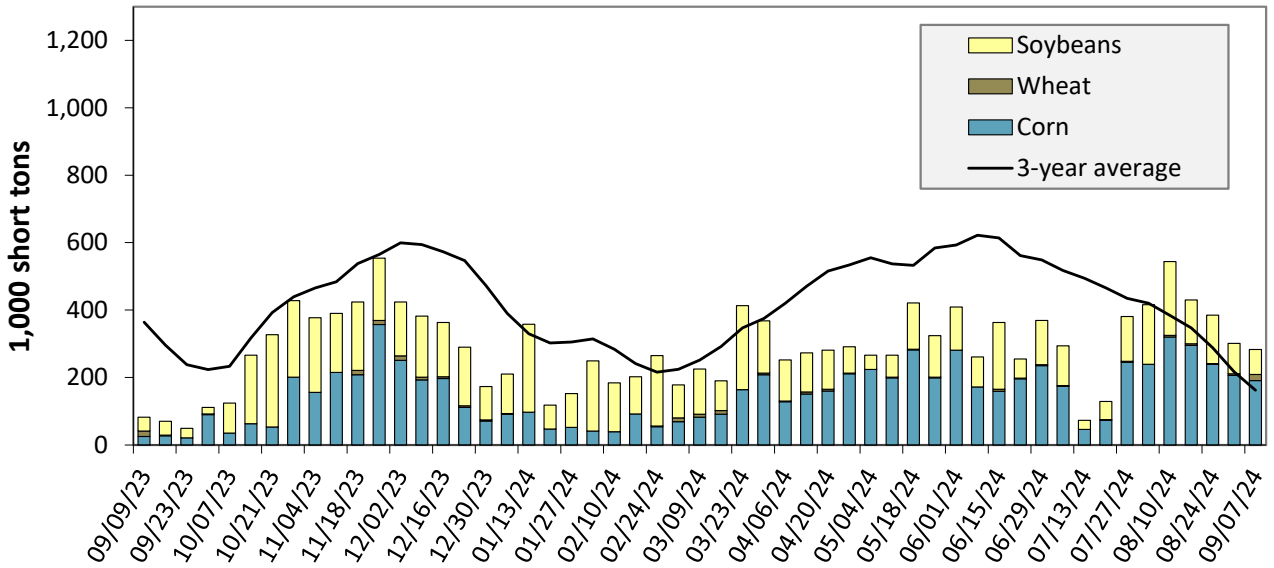
Figure 10. Benchmark tariff rates

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 September 7: 245 percent higher than last year and 74 percent higher than the 3-year average.

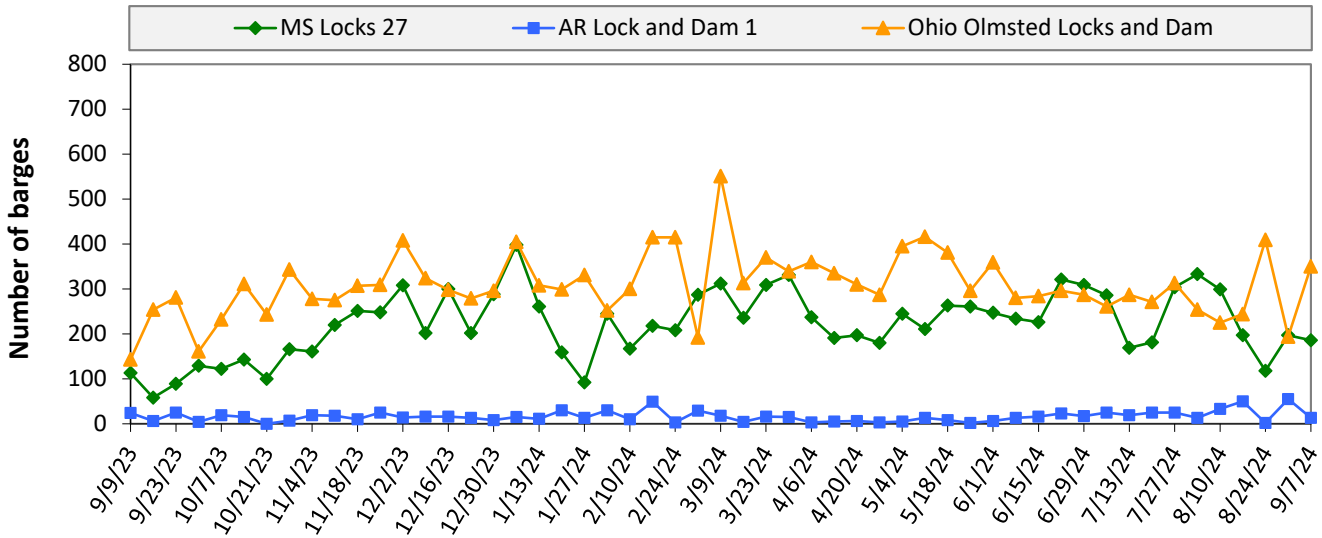
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 09/07/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	23	0	22	0	45
Mississippi River (Winfield, MO (L25))	109	8	44	0	162
Mississippi River (Alton, IL (L26))	181	18	76	0	275
Mississippi River (Granite City, IL (L27))	191	18	74	0	283
Illinois River (La Grange)	40	0	14	0	55
Ohio River (Olmsted)	56	10	28	0	94
Arkansas River (L1)	0	17	1	0	18
Weekly total - 2024	247	44	103	0	395
Weekly total - 2023	39	56	78	0	173
2024 YTD	10,300	1,268	7,086	170	18,824
2023 YTD	8,824	1,088	7,246	200	17,358
2024 as % of 2023 YTD	117	117	98	85	108
Last 4 weeks as % of 2023	916	112	160	137	315
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.

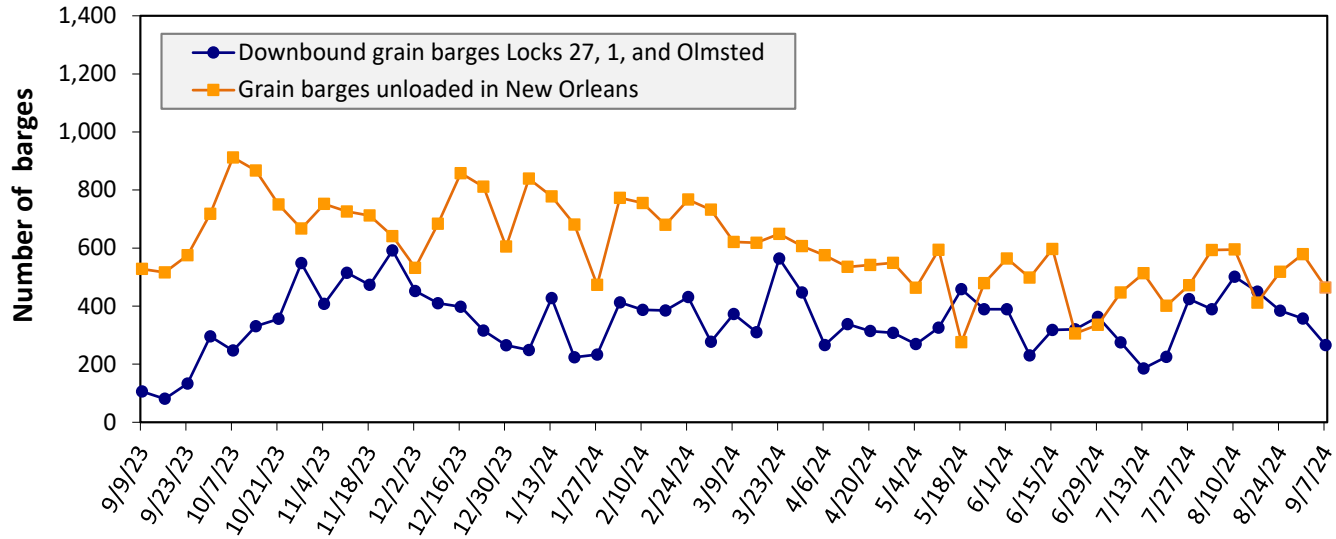
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 7: 549 barges transited the locks, 103 barges more than the previous week, and 80 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 September 7: 266 barges moved down river, 91 fewer than the previous week; 464 grain barges unloaded in the New Orleans Region, 20 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.

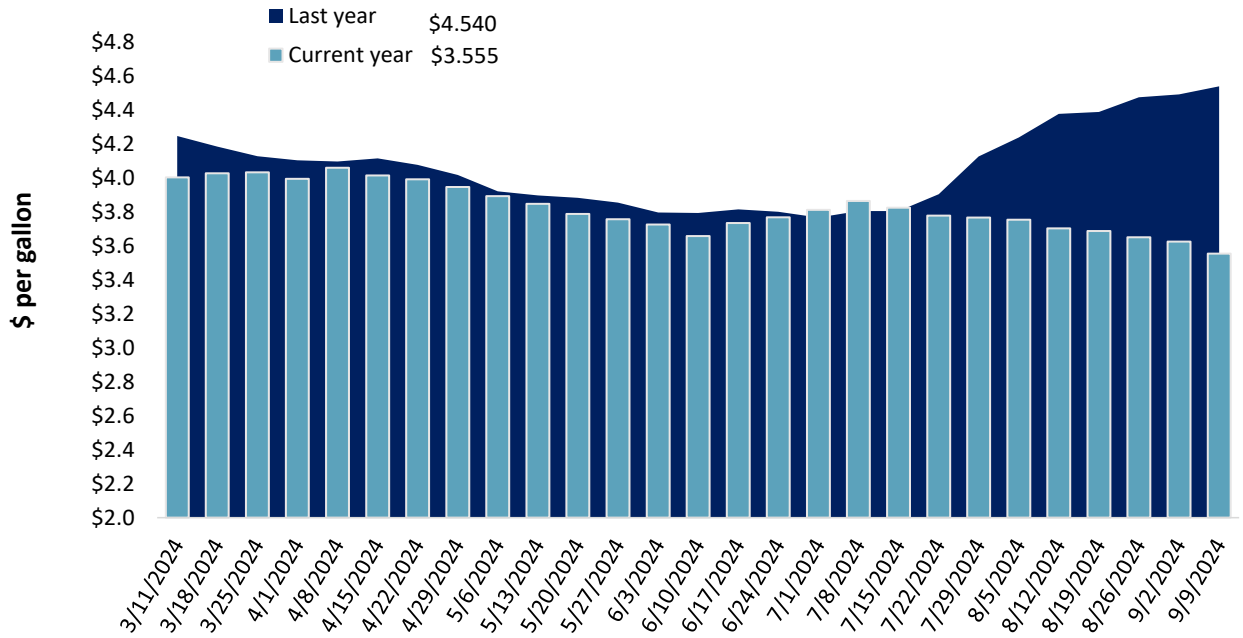
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

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

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.619	-0.067	-0.860
	New England	3.871	-0.048	-0.607
	Central Atlantic	3.847	-0.061	-0.804
	Lower Atlantic	3.508	-0.072	-0.909
II	Midwest	3.528	-0.085	-0.899
III	Gulf Coast	3.190	-0.075	-1.022
IV	Rocky Mountain	3.567	-0.023	-1.243
V	West Coast	4.257	-0.036	-1.278
	West Coast less California	3.837	-0.059	-1.316
	California	4.739	-0.010	-1.231
Total	United States	3.555	-0.070	-0.985

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 9, the U.S. average diesel fuel price decreased 7.0 cents from the previous week to $3.555 per gallon, 98.5 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 8/29/2024	1,123	742	1,603	1,164	60	4,691	1,768	1,008	7,468
	This week year ago	615	744	1,442	718	176	3,695	1,113	1,223	6,031
	Last 4 wks. as % of same period 2022/23	189	110	120	162	35	133	33	13	35
Current shipped (cumulative) exports sales	2023/24 YTD	1,409	980	1,704	1,400	107	5,600	54,010	44,430	104,039
	2022/23 YTD	814	1,138	1,364	839	24	4,180	39,469	52,208	95,857
	YTD 2023/24 as % of 2022/23	173	86	125	167	0	134	137	85	109
	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 8/29/2024	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	5,699	22,578	15,423	46	15,445
China	0	2,822	7,585	-63	14,427
Japan	1,303	11,132	6,907	61	9,283
Colombia	652	6,378	2,472	158	3,592
Korea	63	2,415	821	194	1,938
Top 5 importers	**7,717**	**45,324**	**33,209**	**36**	**44,685**
Total U.S. corn export sales	11,241	55,778	40,583	37	55,397
% of YTD current month's export projection	19%	98%	96%	-	-
Change from prior week	1,823	-173	-15	-	-
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 8/29/2024	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	3897	24,416	31,519	-23	32,321
Mexico	979	4,818	4,634	4	4,912
Egypt	360	1,453	1,150	26	2,670
Japan	227	2,193	2,390	-8	2,259
Indonesia	162	2,286	1,875	22	1,973
Top 5 importers	**5,624**	**35,167**	**41,567**	**-15**	**44,133**
Total U.S. soybean export sales	**11,817**	**45,438**	**53,430**	**-15**	**56,656**
% of YTD current month's export projection	23%	98%	99%	-	-
Change from prior week	1,659	-228	156	-	-
Top 5 importers' share of U.S. soybean export sales	**48%**	**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 08/29/2024	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	1,718	1,439	19	3,298
Philippines	1,325	1,150	15	2,494
Japan	844	884	-4	2,125
China	139	272	-49	1,374
Korea	979	520	88	1,274
Taiwan	453	561	-19	921
Nigeria	198	104	90	920
Thailand	298	158	88	552
Colombia	233	154	51	522
Vietnam	259	143	80	313
Top 10 importers	**6,446**	**5,387**	**20**	**13,792**
Total U.S. wheat export sales	**10,291**	**7,875**	**31**	**18,323**
% of YTD current month's export projection	46%	41%		-
Change from prior week	340	370	-	-
Top 10 importers' share of U.S. wheat export sales	**63%**	**68%**	**-**	**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.

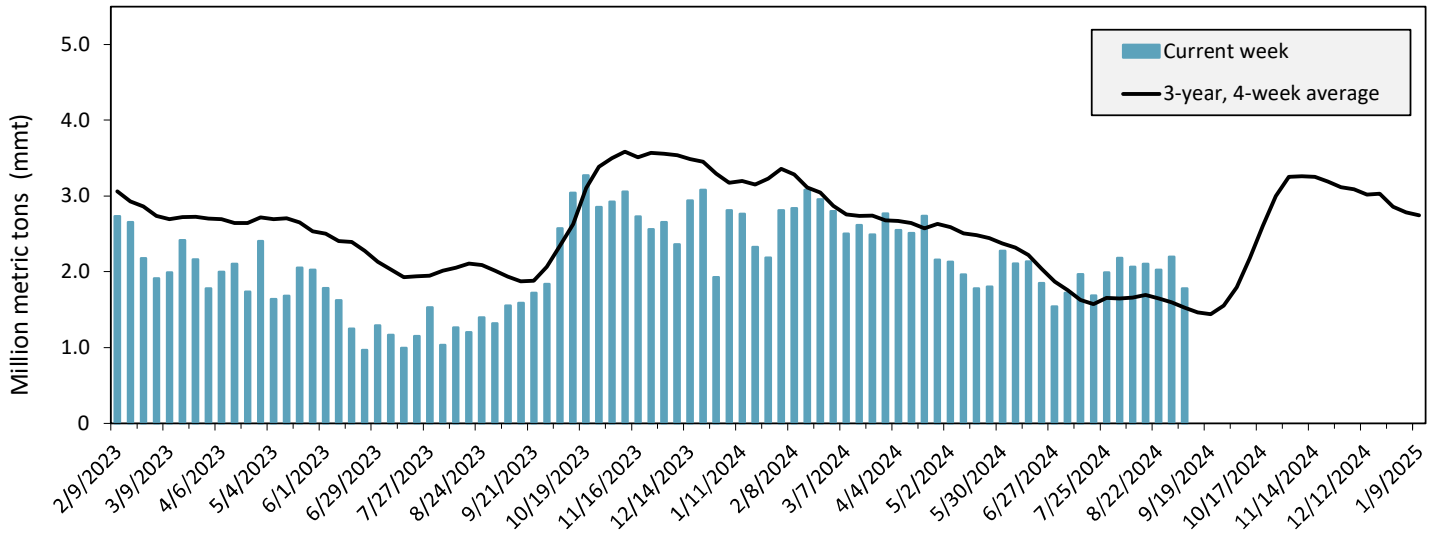
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 09/05/2024	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	0	63	0	11,642	3,983	292	n/a	293	5,267
	Soybeans	0	68	0	2,669	3,356	80	n/a	75	10,286
	Wheat	289	342	85	7,899	6,692	118	156	109	9,814
	All Grain	**289**	**473**	**61**	**23,296**	**14,226**	**164**	**215**	**119**	**25,913**
Mississippi Gulf	Corn	553	691	80	18,707	17,278	108	172	169	23,630
	Soybeans	252	320	79	13,510	14,574	93	118	108	26,878
	Wheat	55	108	51	3,535	2,518	140	144	81	3,335
	All Grain	**861**	**1,119**	**77**	**35,812**	**34,370**	**104**	**150**	**135**	**53,843**
Texas Gulf	Corn	10	11	91	381	236	161	203	93	397
	Soybeans	0	0	n/a	0	50	0	n/a	n/a	267
	Wheat	89	21	433	1,262	1,298	97	596	96	1,593
	All Grain	**101**	**154**	**66**	**4,311**	**3,721**	**116**	**121**	**110**	**5,971**
Interior	Corn	273	201	136	9,487	6,377	149	164	180	10,474
	Soybeans	102	114	89	4,868	3,718	131	147	151	6,508
	Wheat	116	124	94	2,158	1,677	129	123	115	2,281
	All Grain	**493**	**443**	**111**	**16,664**	**11,874**	**140**	**149**	**155**	**19,467**
Great Lakes	Corn	0	0	n/a	0	23	0	n/a	n/a	57
	Soybeans	0	0	n/a	18	54	33	n/a	n/a	192
	Wheat	37	6	625	335	192	174	142	211	581
	All Grain	**37**	**6**	**625**	**353**	**269**	**131**	**78**	**90**	**831**
Atlantic	Corn	0	0	n/a	213	82	259	n/a	42	166
	Soybeans	0	0	n/a	440	1,192	37	5	5	2,058
	Wheat	0	2	0	65	83	78	347	502	101
	All Grain	**0**	**2**	**0**	**717**	**1,357**	**53**	**140**	**116**	**2,325**
All Regions	Corn	836	966	87	40,429	27,991	144	185	173	40,004
	Soybeans	354	502	70	21,558	23,049	94	132	111	46,459
	Wheat	587	603	97	15,254	12,461	122	157	106	17,738
	All Grain	**1,781**	**2,197**	**81**	**81,206**	**65,935**	**123**	**156**	**133**	**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.

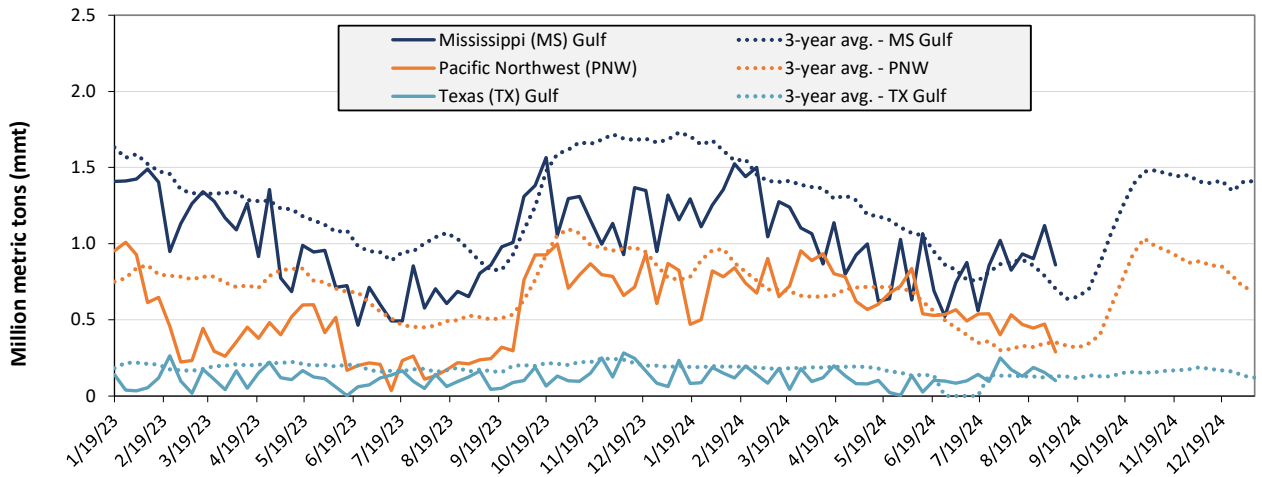
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Sep. 5: 1.8 mmt of grain inspected, down 19 percent from the previous week, up 24 percent from the same week last year, and up 17 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 09/05/24 inspections (mmt):
MS Gulf: 0.86
PNW: 0.29
TX Gulf: 0.1

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 23	down 34	down 24	down 39
Last year (same 7 days)	up 26	down 26	up 17	up 11
3-year average (4-week moving average)	up 22	down 23	up 15	down 18

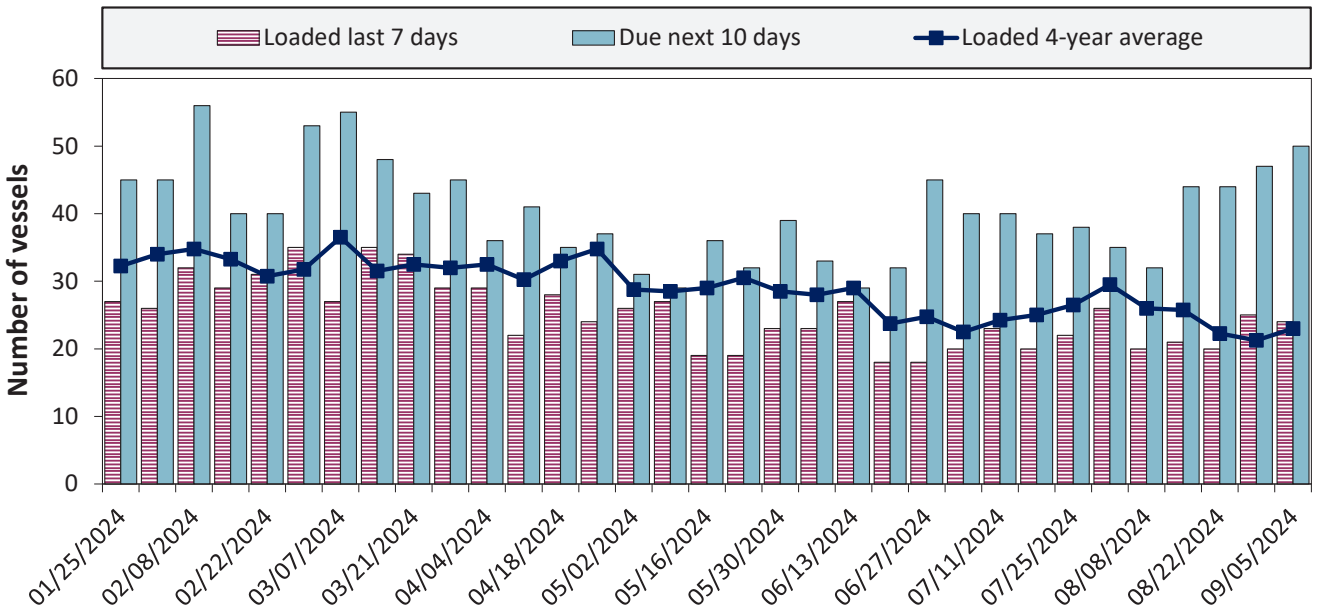
Source: USDA, Federal Grain Inspection Service.

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
9/5/2024	31	24	50	13
8/29/2024	24	25	47	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.

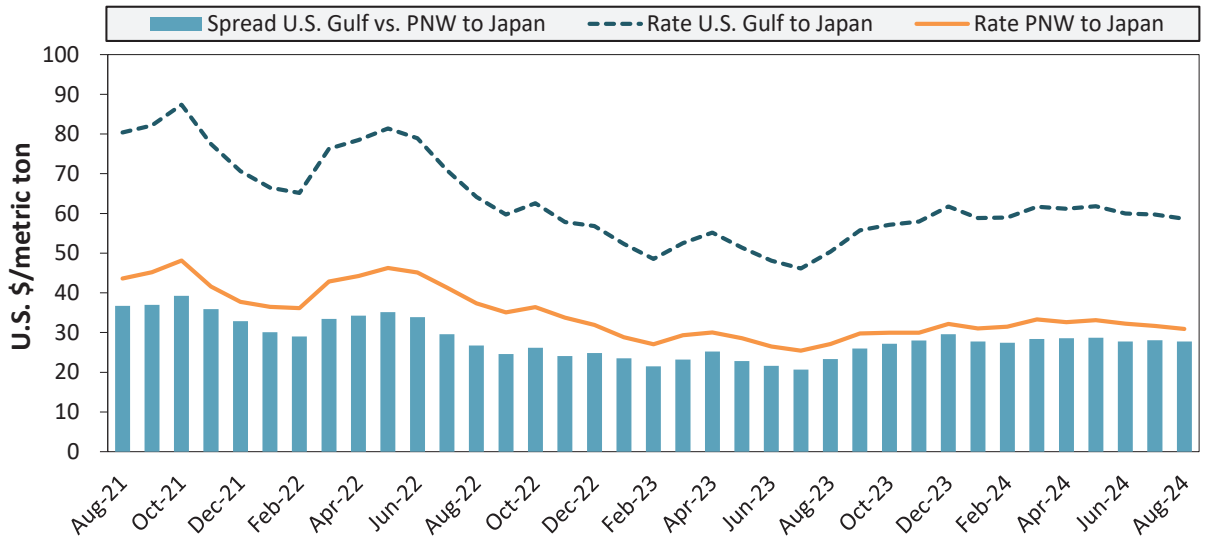
Figure 17. U.S . Gulf vessel loading activity



Week ending 9/5/24, number of vessels	Loaded	Due
Change from last year	-4%	52%
Change from 4-year average	4%	21%

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.

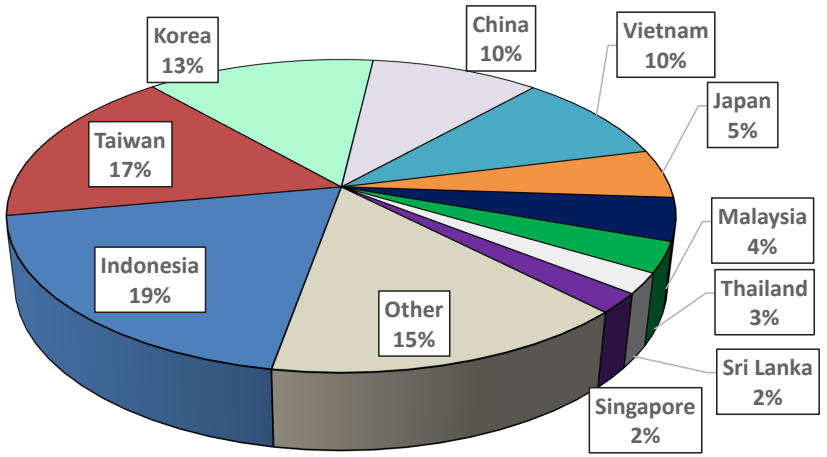
Table 18. Ocean freight rates for selected shipments, week ending 09/07/2024

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.

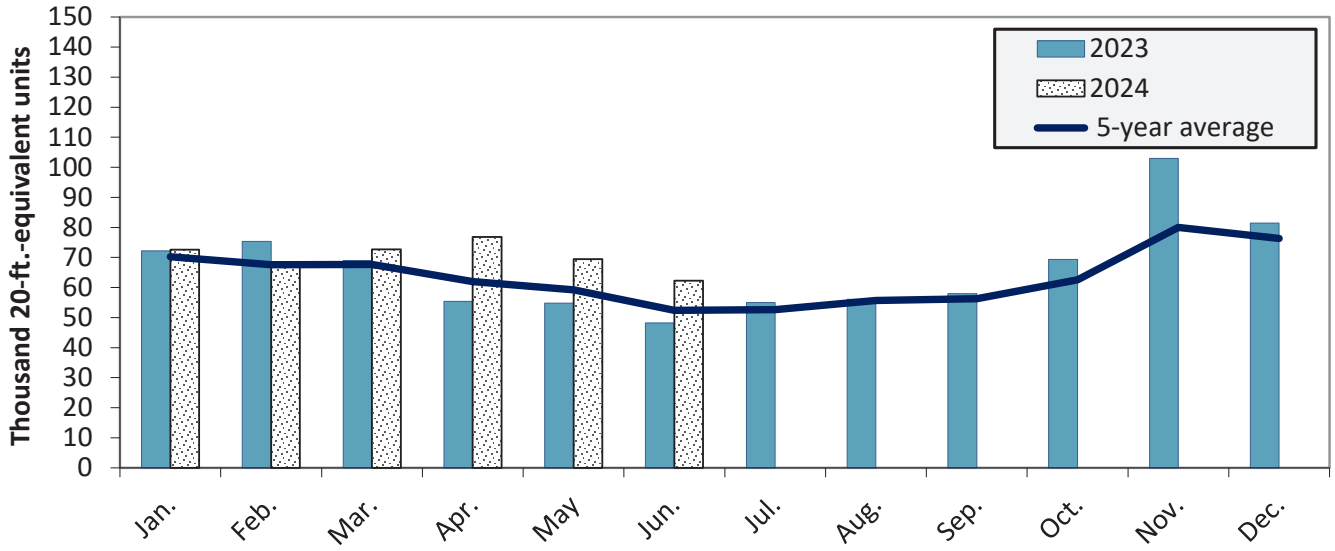
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined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

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



Note: The following harmonized 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 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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