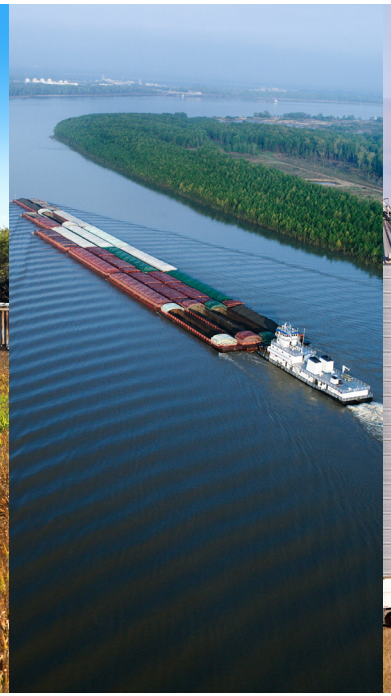
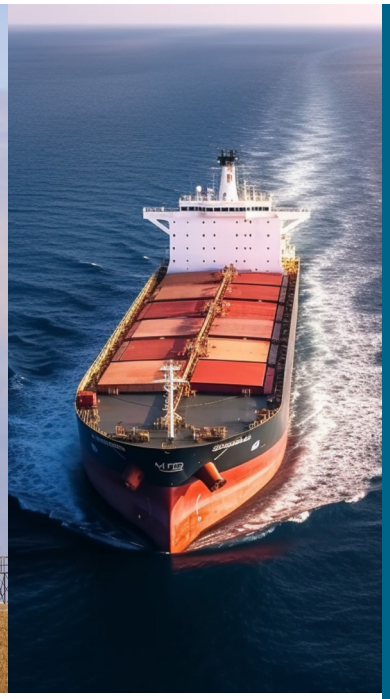
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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www.ams.usda.gov/GTR

BNSF and UP Halt All Grain Shuttle Trains to Mexico. Both BNSF Railway (BNSF) and Union Pacific Railroad (UP) have stopped issuing any permits for grain shuttle trains to Mexico because of ongoing congestion and a growing backlog of loaded trains. Ferromex (FXE)—the Mexican railroad that interchanges with BNSF and UP—currently has permit embargoes in place for the **Eagle Pass, TX**, and **El Paso, TX**, border crossings.

Because of severe capacity constraints on its network (***Grain Transportation Report (GTR), August 8, 2024, first highlight***), FXE has issued embargoes on multiple traffic segments, including grain, which have impacted cross-border rail service between the U.S. and Mexico. However, in response, BNSF and UP have levied additional restrictions, targeted only to grain, with their latest announcements.

BNSF stopped issuing any permits for grain shuttle trains destined to Mexico from August 21 to September 20 (**GTR, August 22, 2024, second highlight**), before recently extending the policy through September 30. On September 18, **UP stopped issuing** any permits for grain shuttle trains to Mexico until FXE lifts its embargoes or the current train backlog is cleared. According to UP, cycle times (i.e., round-trip) for grain shuttle trains to Mexico are up 20 percent from the same time last year, and UP is currently holding 18 grain shuttle trains (either en route or at the U.S. origin) due to delays.

USDA-AMS Updates Modal Share Analysis Report. On September 18, 2024, USDA's Agricultural Marketing Service (AMS) released an updated ***Transportation of U.S. Grain Modal Share report***, which tracks grain movements to domestic markets and to U.S. ports for export. With the addition of 2 new years (2021 and 2022), the updated report breaks down 1984-2022 data by shipping mode (rail, barge, and truck) and by grain (i.e., corn, wheat, soybeans, sorghum, and barley).

From 2020 to 2022, the tonnage of all grain transported decreased 2 percent, from 589 million tons to 575 million tons. Over the same period, the share moved by rail was up 3 percentage points (pp); by barge, down 1 pp; and by truck, down 2 pp.

From 2020 to 2022, railroads moved 8 million more tons of corn and 2 million more tons of soybeans to export markets (up 10 pp and up 7 pp, respectively). One reason for this increase was drought-stymied barge transportation (see **GTR, May 2, 2024**). Although all modes saw wheat volumes decline from 2020 to 2022, railroads' modal share rose 5 pp, to 56 percent. The **Transportation of U.S. Grains: A Modal Share Analysis page** on AgTransport features interactive charts of the data included in the report.

STB Holds Hearing on Growth in the Freight Rail Industry. On September 16 and 17, the Surface Transportation Board (STB) held a public hearing on "growth in the freight rail industry." STB heard testimony from industry analysts, all six Class I railroads, short line railroads, labor unions, and shipper groups (including grain shippers).

STB called the hearing to address the issue of **declining freight rail carloads** in recent decades—a decline that includes grain carloads. According to STB's public-use carload waybill sample (**available on AgTransport** for 2005-22), originated grain rail carloads (i.e., corn, wheat, and soybeans) peaked in 2006 at 1.48 million carloads—11 percent higher than originated grain carloads in 2022.

In the hearing's various discussion panels, shippers noted that periodic service disruptions and high freight costs are barriers to achieving growth in freight rail carloads. The recorded hearing is available on STB's **YouTube channel**, and STB will post a transcript of the hearing on its **website**. Written testimony associated with this hearing is filed under **docket number EP 775**.

*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 September 5, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 31.36 million metric tons (mmt), up 3 percent from the same time last year.

Net **corn export sales** for MY 2024/25, which began September 1, were 0.67 mmt. Net **soybean export sales** for MY 2024/25, which also began September 1, were 1.47 mmt. Net **wheat export sales** for MY 2024/25 were 0.48 mmt, up 40 percent from last week.

Rail

U.S. Class I railroads originated 22,944 **grain carloads** during the week ending September 7. This was a 4-percent decrease from the previous week, 26 percent more than last year, and 22 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $742 above tariff for the week ending September 12. This was $467 more than last week and $192 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $650 above tariff. This was $313 more than last week and $50 lower than this week last year.

Barge

For the week ending September 14, **barged grain movements** totaled 367,468 tons. This was 7 percent less than the previous week and 183 percent more than the same period last year.

For the week ending September 14, 235 grain barges **moved down river**—31 fewer than last week. There were 379 grain barges **unloaded** in the New Orleans region, 18 percent fewer than last week.

Ocean

For the week ending September 12, 20 **oceangoing grain vessels** were loaded in the Gulf—20 percent fewer than the same period last year. Within the next 10 days (starting September 13), 60 vessels were expected to be loaded—58 percent more than the same period last year.

As of September 12, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $54.75, 2 percent less than the previous week. The rate from the Pacific Northwest to Japan was $29.50 per mt, 2 percent less than the previous week.

Fuel

For the week ending September 16, the U.S. average **diesel price** decreased 2.9 cents from the previous week to $3.526 per gallon, 110.7 cents below the same week last year.

Second-Quarter 2024 Corn and Soybean Total Landed Costs Decline

Costs for transporting corn and soybeans from Minneapolis, MN, to Japan increased from second quarter 2023 to second quarter 2024 (year to year) via the U.S. Gulf (Gulf route) and the Pacific Northwest (PNW route). From first quarter 2024 to second quarter 2024 (quarter to quarter), transportation costs for both commodities fell via the Gulf route and rose via the PNW route.

Year to year, rises in truck and ocean freight rates—as well as increased barge costs for the Gulf route and rail costs for the PNW route—drove increases in corn and soybean transportation costs. Trucking rates rose with higher diesel prices and overall demand for grain. The higher ocean rates stemmed from continued navigational challenges posed by drought at the Panama Canal and conflict in the Red Sea. The higher rates were also a response to rising demand for coal, grain, and bauxite bulk shipments (**Grain Transportation Report (GTR), July 11, 2024**).

Year to year, for corn and soybean shipments via both routes to Japan, total landed costs fell, because of lower farm values. Quarter to quarter, total landed costs for corn and soybeans fell because of lower transportation costs and farm values for the Gulf route and lower farm values for the PNW route (**tables 1** and **2**).

U.S. Gulf Costs

Transportation and total landed costs. Year to year, transportation costs through the Gulf rose 22 percent for corn and soybeans. For both corn and soybeans, these increases were driven by rises in truck rates (up 16 percent), barge rates (up 37 percent), and ocean rates (up 18 percent). Quarter to quarter, transportation costs for Gulf-route shipping were down 25 percent for corn and down 23 percent for soybeans. The quarter-to-quarter decreases reflected declining rail use, as the annual reopening of the Upper Mississippi (after the winter closure) allowed barge trips from Minnesota to the Gulf.

In second quarter 2024, transportation costs for corn represented 38 percent of total landed costs for the Gulf route, and that share was up 13 percentage points year to year and down 6 percentage points quarter to quarter. For soybeans, transportation costs accounted for 20 percent of total landed costs, up 6 percentage points year to year and down 4 percentage points quarter to quarter (see **table 1**).

Inspections. Down 14 percent year to year, second-quarter 2024 U.S. Gulf corn inspections totaled 7.2 mmt, which was 43 percent of total second quarter 2024 corn inspections. Up 10 percent year to year, U.S. Gulf soybean inspections totaled 2.9 mmt, which was 64 percent of total second quarter 2024 soybean inspections (**GTR, August 8, 2024**).

Pacific Northwest Costs

Transportation and total landed costs. Year to year, PNW-route transportation costs rose 10 percent each for corn and soybeans, because of higher truck, rail, and ocean freight rates. Quarter to quarter, transportation costs increased less than 1 percent each for corn and soybeans.

Because of lower farm values, total landed costs for corn decreased 21 percent year to year and fell 2 percent quarter to quarter. Likewise, because of lower farm values, soybean landed costs decreased 15 percent year to year and fell 3 percent quarter to quarter.

In second quarter 2024, transportation costs for corn accounted for 39 percent of the total landed costs for the PNW route, up 11 percentage points year to year and up 1 percentage point quarter to quarter. For soybeans, transportation costs accounted for 22 percent of total landed costs—up 5 percentage points year to year and up 1 percentage point quarter to quarter (see **table 2**).

Table 1. Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent change	
	2nd qtr. '23	1st qtr. '24	2nd qtr. '24	Yr. to yr.	Qtr. to qtr.	2nd qtr. '23	1st qtr. '24	2nd qtr. '24	Yr. to yr.	Qtr. to qtr.
Truck	14.19	16.11	16.47	16.07	2.23	14.19	16.11	16.47	16.07	2.23
Barge	17.68	13.63	24.29	37.39	78.21	17.68	13.63	24.29	37.39	78.21
Rail	-	46.95	-	-	-	-	43.28	-	-	-
Ocean	51.56	59.82	61.00	18.31	1.97	51.56	59.82	61.00	18.31	1.97
Total transportation cost	83.43	136.51	101.76	21.97	-25.46	83.43	132.84	101.76	21.97	-23.40
Farm value	251.96	176.11	169.02	-32.92	-4.03	519.31	433.58	417.65	-19.58	-3.67
Total landed cost	335.39	312.62	270.78	-19.26	-13.38	602.74	566.42	519.41	-13.83	-8.30
Transportation % landed cost	24.88	43.67	37.58	12.70	-6.09	13.84	23.45	19.59	5.75	-3.86

Table 2. Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent change	
	2nd qtr. '23	1st qtr. '24	2nd qtr. '24	Yr. to yr.	Qtr. to qtr.	2nd qtr. '23	1st qtr. '24	2nd qtr. '24	Yr. to yr.	Qtr. to qtr.
Truck	14.19	16.11	16.47	16.07	2.23	14.19	16.11	16.47	16.07	2.23
Rail	56.21	59.95	59.82	6.42	-0.22	63.56	67.15	67.02	5.44	-0.19
Ocean	28.35	31.96	32.66	15.20	2.19	28.35	31.96	32.66	15.20	2.19
Total transportation cost	98.75	108.02	108.95	10.33	0.86	106.10	115.22	116.15	9.47	0.81
Farm value	251.96	176.11	169.02	-32.92	-4.03	519.31	433.58	417.65	-19.58	-3.67
Total landed cost	350.71	284.13	277.97	-20.74	-2.17	625.41	548.80	533.80	-14.65	-2.73
Transportation % landed cost	28.16	38.02	39.19	11.04	1.18	16.96	20.99	21.76	4.79	0.76

Note: Barge rates are from Minneapolis to the Gulf for the second quarter and St. Louis to the Gulf for the first quarter. First quarter also includes a rail portion, from Minneapolis to St. Louis, given the closure of the Upper Mississippi River. All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car. USDA, National Agricultural Statistics Service is the source for corn and soybean prices. The quarter-to-quarter and year-to-year changes in transportation's share of total landed costs reflect percentage-point changes.
Source: USDA, Agricultural Marketing Service.

Inspections. Second-quarter corn inspections in PNW totaled 5.6 mmt, up 84 percent year to year, mainly because of an increase in corn inspections destined to Asia (GTR, August 8, 2024). PNW corn inspections were 34 percent of total second quarter 2024 corn inspections. PNW soybean inspections totaled 0.1 mmt, down 65 percent year to year.

Market Outlook

According to USDA's September *World Agricultural Supply and Demand Estimates* report, from marketing year (MY) 2023/24 to MY 2024/25, total U.S. corn exports are expected to increase less than 1 percent, to 58.42 mmt, with the bulk of the demand coming from Latin America and Asia. Also, from MY 2023/24 to MY 2024/25, soybean exports are expected to increase 9 percent, to 50.35 mmt.

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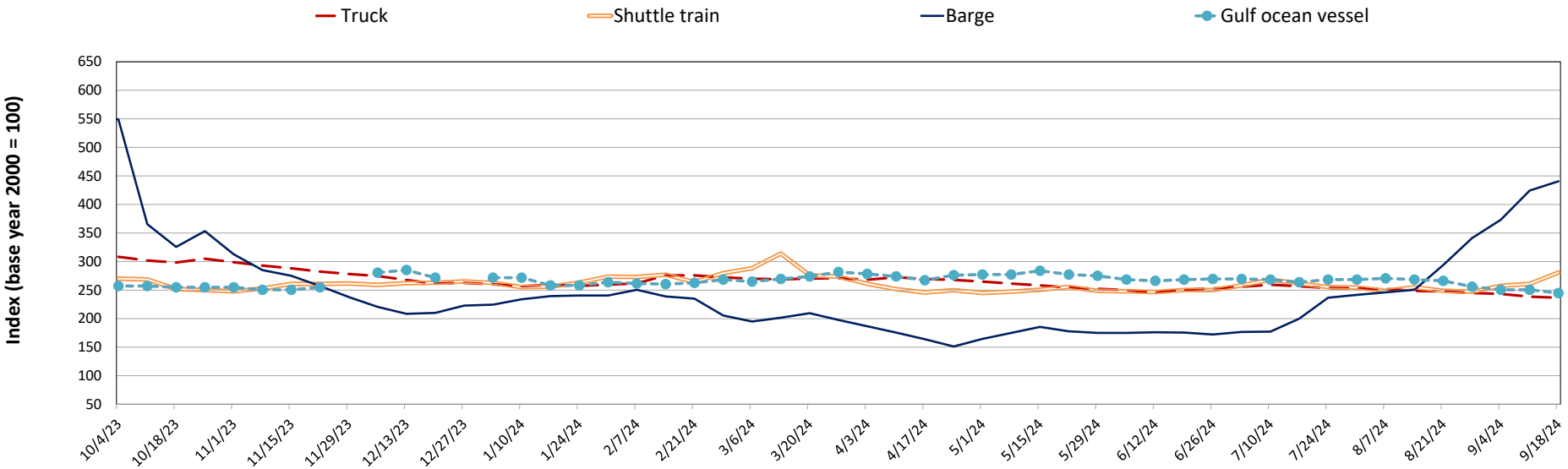
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
09/18/24	237	356	281	441	245	209
09/11/24	239	339	261	424	250	213
09/20/23	311	352	273	466	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.

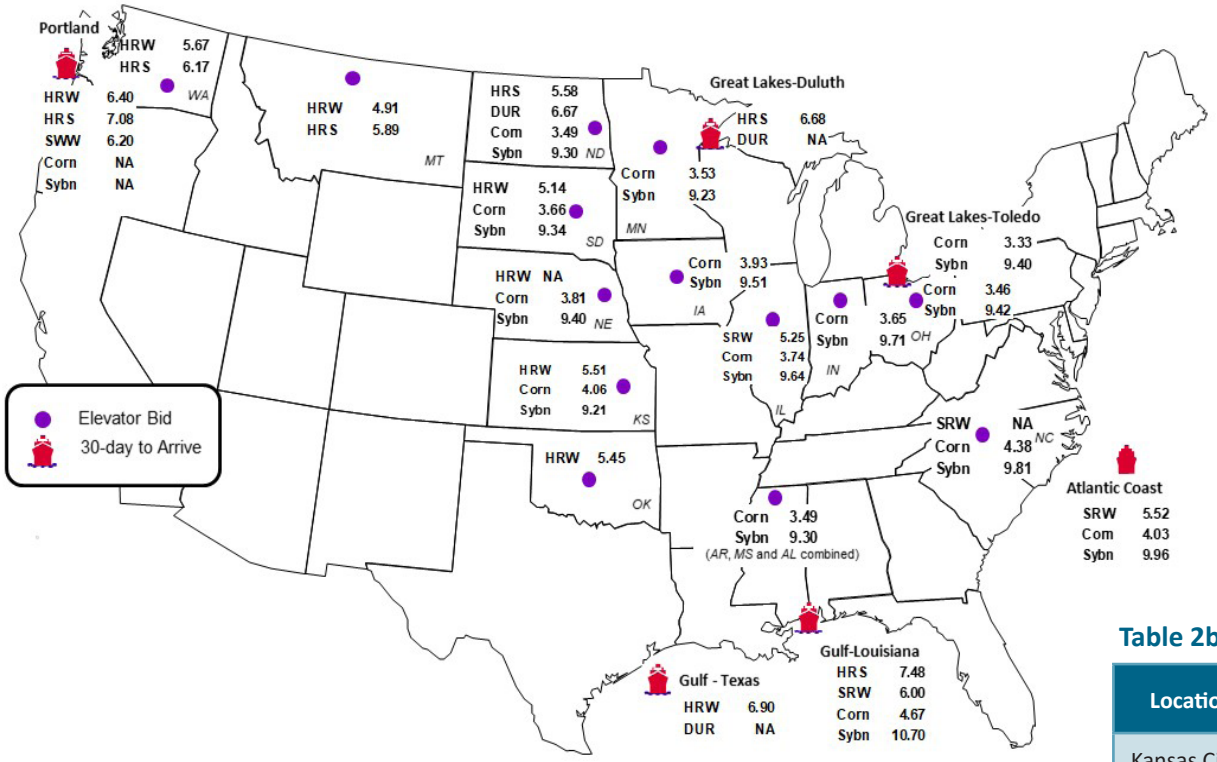
Figure 1. Grain transportation cost indicators as of week ending 09/18/24



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	9/13/2024	9/6/2024
Corn	IL–Gulf	-0.93	-0.93
Corn	NE–Gulf	-0.86	-0.79
Soybean	IA–Gulf	-1.19	-1.12
HRW	KS–Gulf	-1.39	-1.62
HRS	ND–Portland	-1.50	-1.74

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	9/13/2024	Week ago 9/6/2024	Year ago 9/15/2023
Kansas City	Wheat	Dec	5.830	5.782	7.346
Minneapolis	Wheat	Dec	6.354	6.136	7.830
Chicago	Wheat	Dec	5.790	5.672	5.944
Chicago	Corn	Dec	4.106	4.056	4.760
Chicago	Soybean	Nov	10.080	10.134	13.364

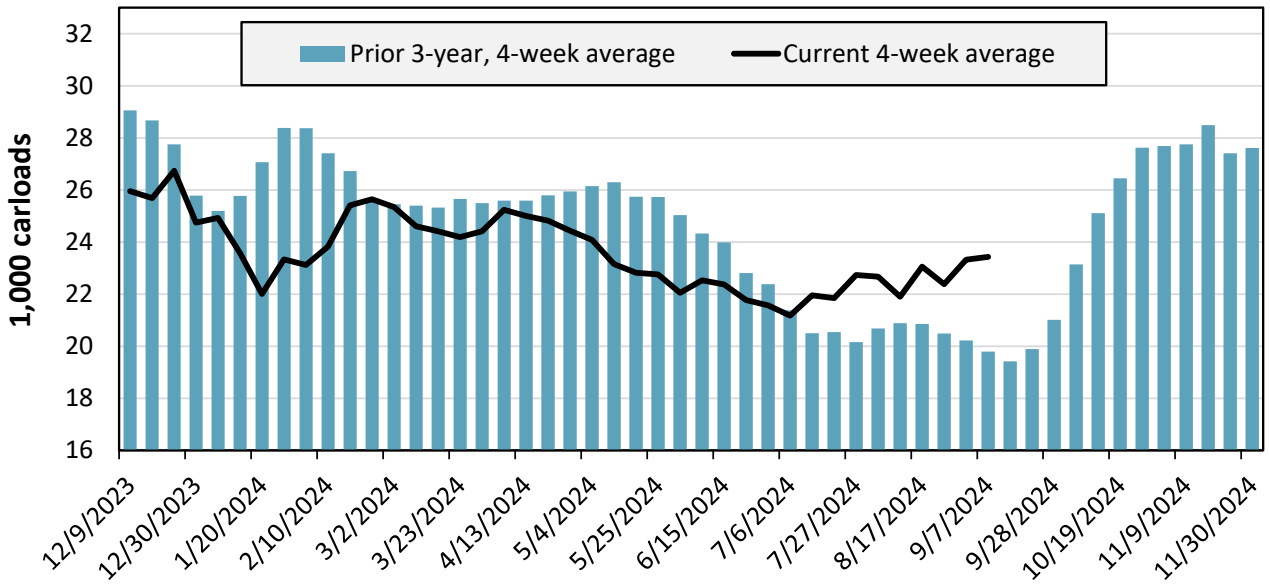
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 9/07/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,533	2,182	9,839	5,998	2,343	1,049	22,944
This week last year	1,131	1,424	7,549	4,522	2,762	775	18,163
2024 YTD	59,497	96,348	372,331	184,120	95,987	33,568	841,851
2023 YTD	61,999	92,071	309,280	185,146	81,877	44,802	775,175
2024 YTD as % of 2023 YTD	96	105	120	99	117	75	109
Last 4 weeks as % of 2023	154	168	135	125	92	124	130
Last 4 weeks as % of 3-yr. avg.	133	153	123	107	95	113	118
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 September 7, grain carloads were unchanged from the previous week, up 30 percent from last year, and up 18 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: 9/7/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	29.1	22.4	13.0	20.3	9.6	9.5	13.4	16.8
	Average over last 4 weeks	23.7	25.4	15.6	20.5	9.9	15.5	38.4	21.3
	Average of same 4 weeks last year	49.2	48.6	8.4	15.8	7.1	27.4	13.2	24.2
Grain unit train speeds (miles per hour)	This week	24.3	19.8	25.1	22.6	24.5	20.6	22.9	22.8
	Average over last 4 weeks	23.8	20.2	23.7	22.0	23.5	19.5	22.3	22.1
	Average of same 4 weeks last year	24.3	16.2	25.4	22.7	23.9	18.9	24.8	22.3

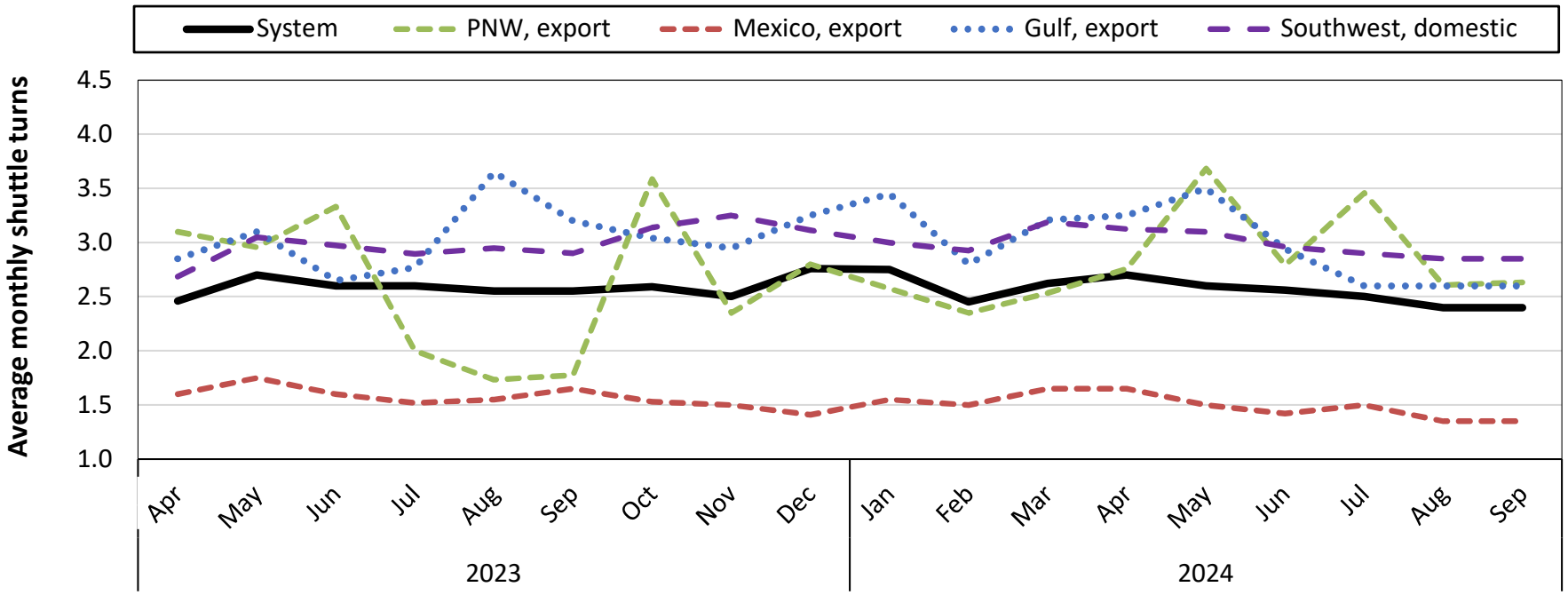
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics 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: 9/7/2024		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	31	8	482	107	7	54	61	750
	Average over last 4 weeks	20	9	397	127	5	99	96	753
	Average of same 4 weeks last year	35	17	447	64	4	95	25	686
Loaded grain cars not moved in over 48 hours (number)	This week	22	125	428	167	0	97	65	904
	Average over last 4 weeks	28	143	554	138	3	127	75	1,068
	Average of same 4 weeks last year	16	225	347	122	6	144	43	903
Grain unit trains held (number)	This week	0	0	9	11	0	3	3	26
	Average over last 4 weeks	0	0	14	8	0	4	5	31
	Average of same 4 weeks last year	0	4	6	6	0	5	6	27
Unfilled grain car orders (number)	This week	0	0	1,134	248	0	146	250	1,778
	Average over last 4 weeks	1	3	1,594	402	0	152	108	2,258
	Average of same 4 weeks last year	0	5	399	101	0	354	33	891

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

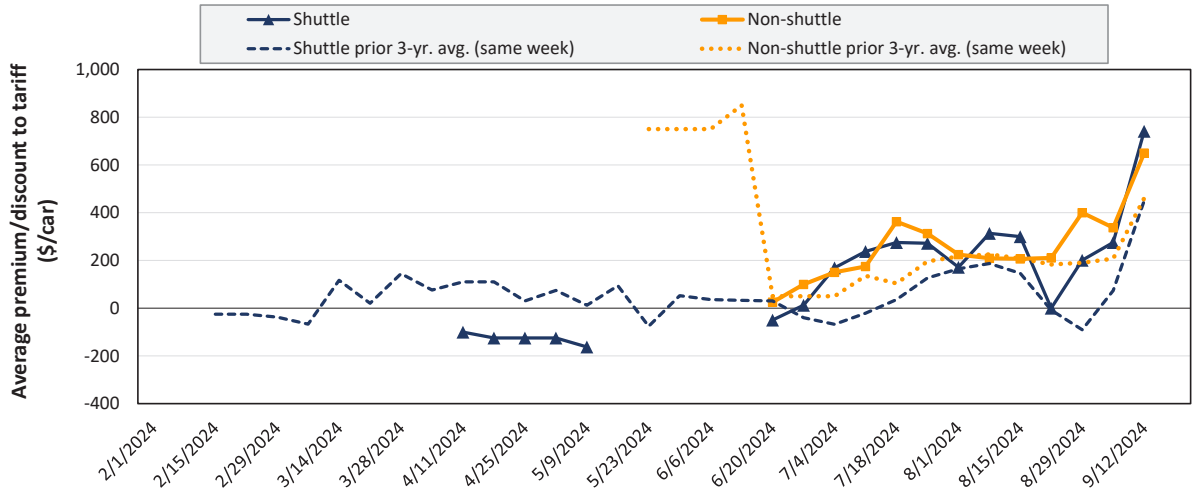


Average monthly system-wide grain shuttle turns reported in the first week of September 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.63 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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



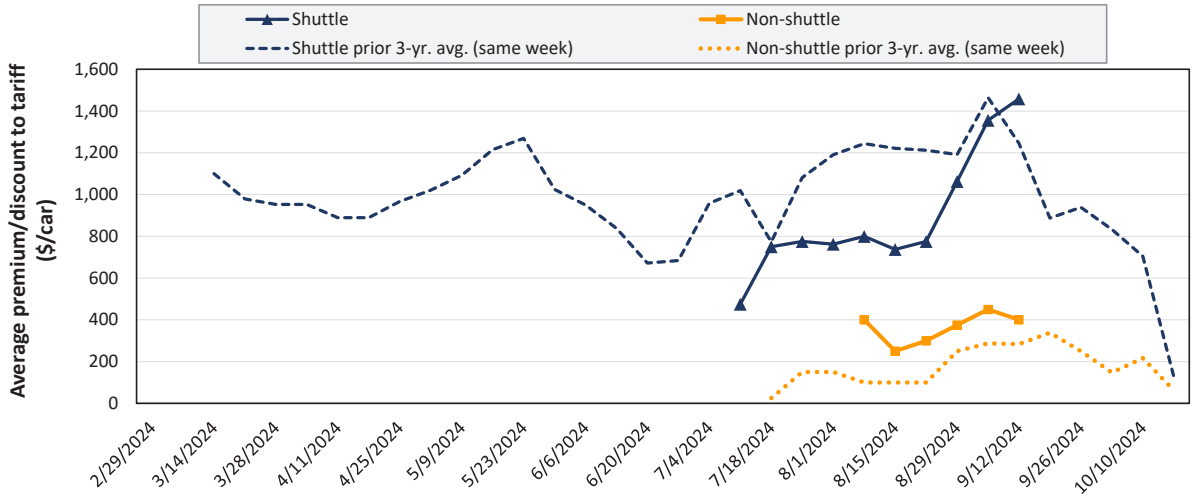
Average non-shuttle bids/offers rose $313 this week, and are at the peak.

Average shuttle bids/offers rose $467 this week and are at the peak.

9/12/2024	BNSF	UP
Non-Shuttle	$650	n/a
Shuttle	$875	$608

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



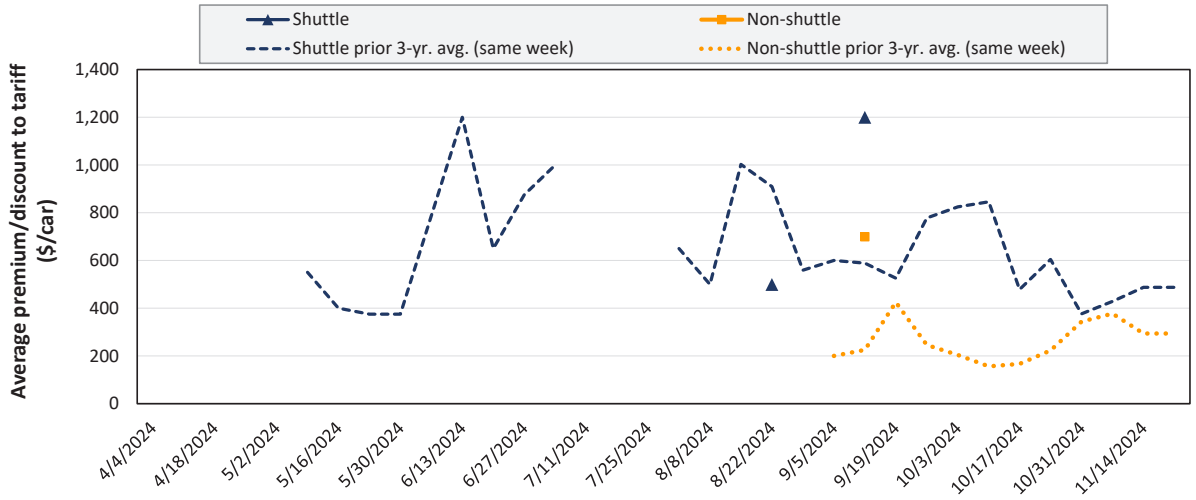
Average non-shuttle bids/offers fell $50 this week, and are $50 below the peak.

Average shuttle bids/offers rose $102 this week and are at the peak.

9/12/2024	BNSF	UP
Non-Shuttle	$600	$200
Shuttle	$1,783	$1,133

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 last week. Average non-shuttle bids/offers this week are at the peak.

There were no shuttle bids/offers last week. Average shuttle bids/offers this week are at the peak.

9/12/2024	BNSF	UP
Non-Shuttle	$700	n/a
Shuttle	$1,200	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: 9/12/2024		Delivery period					
		Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25
Non-shuttle	BNSF	650	600	700	n/a	n/a	n/a
	Change from last week	150	0	n/a	n/a	n/a	n/a
	Change from same week 2023	-350	n/a	n/a	n/a	n/a	n/a
	UP	n/a	200	n/a	n/a	n/a	n/a
	Change from last week	n/a	-100	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	0	n/a	n/a	n/a	n/a
Shuttle	BNSF	875	1,783	1,200	n/a	n/a	n/a
	Change from last week	425	383	n/a	n/a	n/a	n/a
	Change from same week 2023	42	758	600	n/a	n/a	n/a
	UP	608	1,133	n/a	n/a	n/a	n/a
	Change from last week	508	-180	n/a	n/a	n/a	n/a
	Change from same week 2023	342	250	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	0	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	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

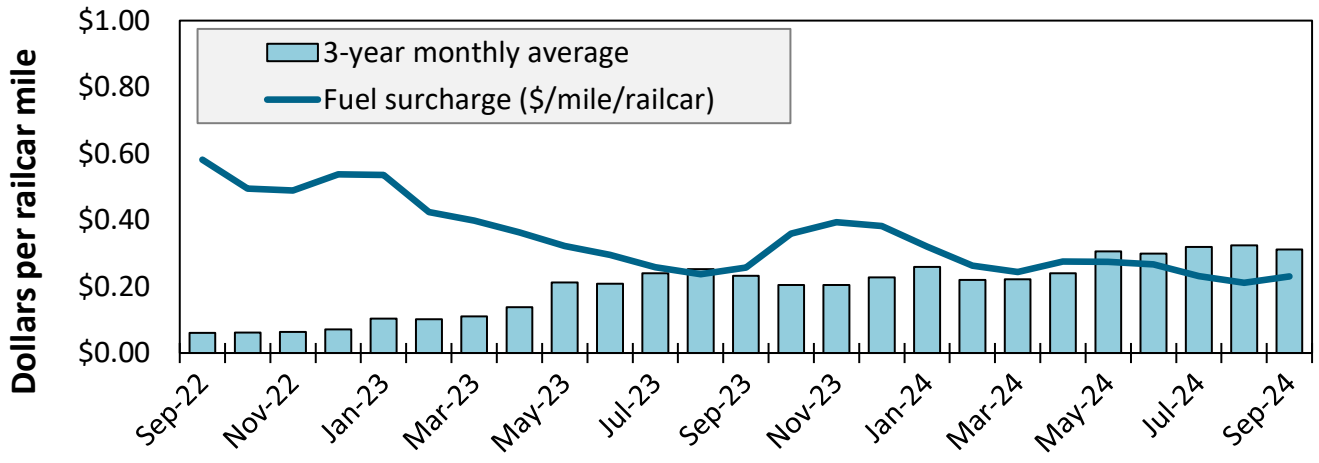
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel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

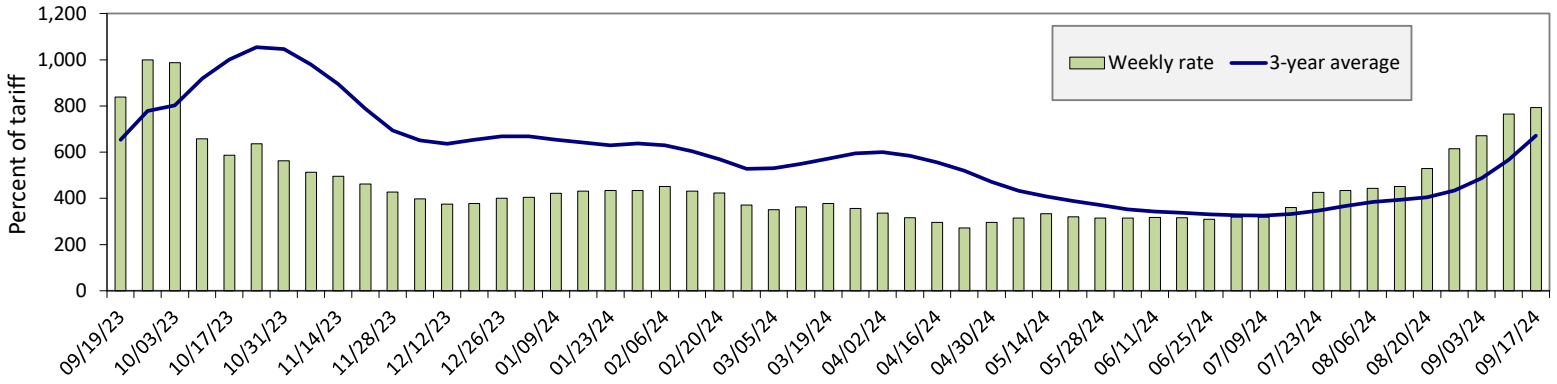
Figure 8. Railroad fuel surcharges, North American weighted average



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 17: 4 percent higher than the previous week; 5 percent lower than last year; and 18 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	9/17/2024	734	784	793	811	807	807	818
	9/10/2024	714	758	764	794	778	778	808
$/ton	9/17/2024	45.43	41.71	36.80	32.36	37.85	32.60	25.69
	9/10/2024	44.20	40.33	35.45	31.68	36.49	31.43	25.37
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	-11	-8	-5	-16	-17	-17	-21
	3-year avg.	5	14	18	26	18	18	16
Rate	October	771	836	826	829	832	832	814
	December	n/a	n/a	512	439	464	464	409

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.

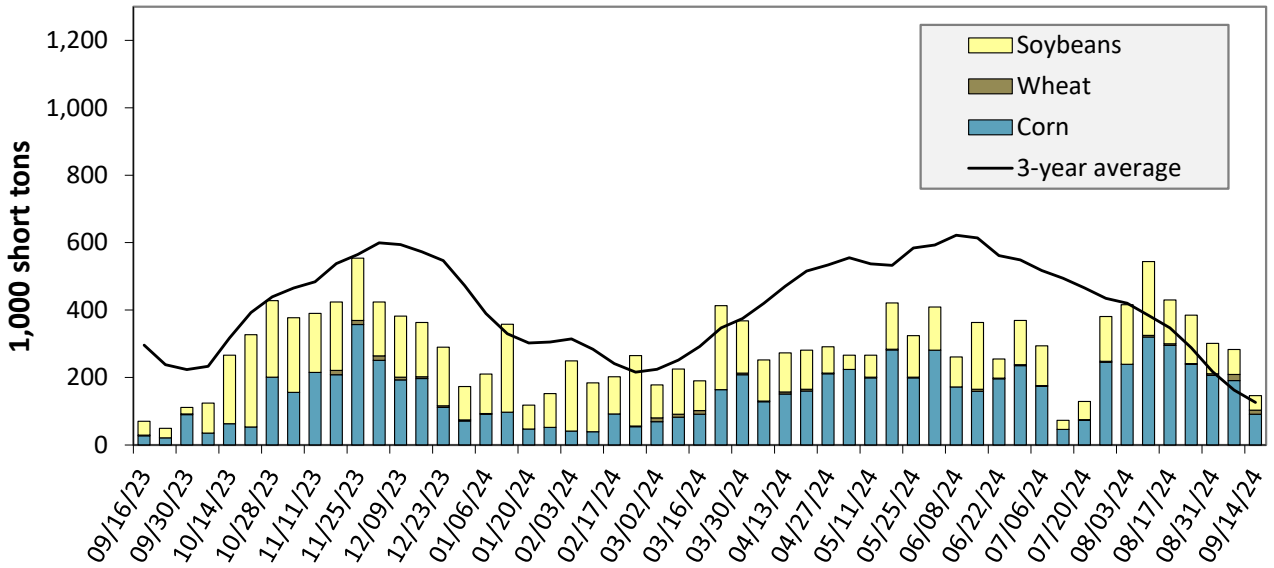
Figure 10. Benchmark tariff rates

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 14: 109 percent higher than last year and 16 percent higher than the 3-year average.

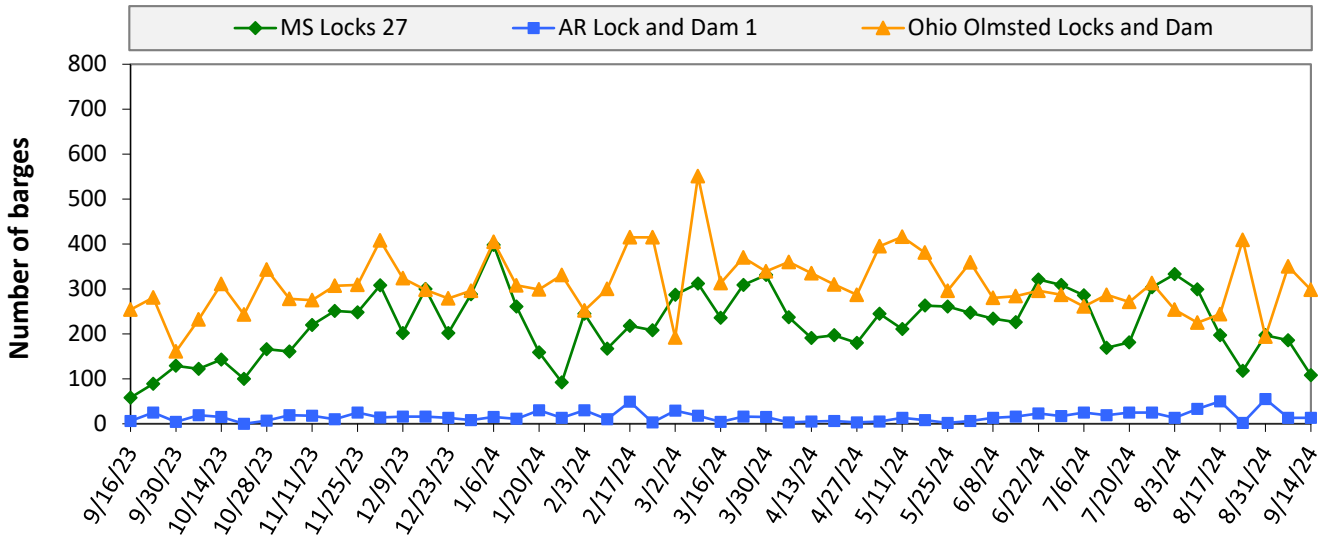
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 09/14/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	30	0	16	0	46
Mississippi River (Winfield, MO (L25))	65	12	33	0	111
Mississippi River (Alton, IL (L26))	95	12	43	0	150
Mississippi River (Granite City, IL (L27))	91	12	43	0	146
Illinois River (La Grange)	43	0	8	0	51
Ohio River (Olmsted)	125	11	52	0	187
Arkansas River (L1)	0	13	22	0	35
Weekly total - 2024	215	35	117	0	367
Weekly total - 2023	44	11	74	2	130
2024 YTD	10,516	1,303	7,203	170	19,192
2023 YTD	8,868	1,099	7,320	202	17,488
2024 as % of 2023 YTD	119	119	98	84	110
Last 4 weeks as % of 2023	725	112	168	300	290
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.

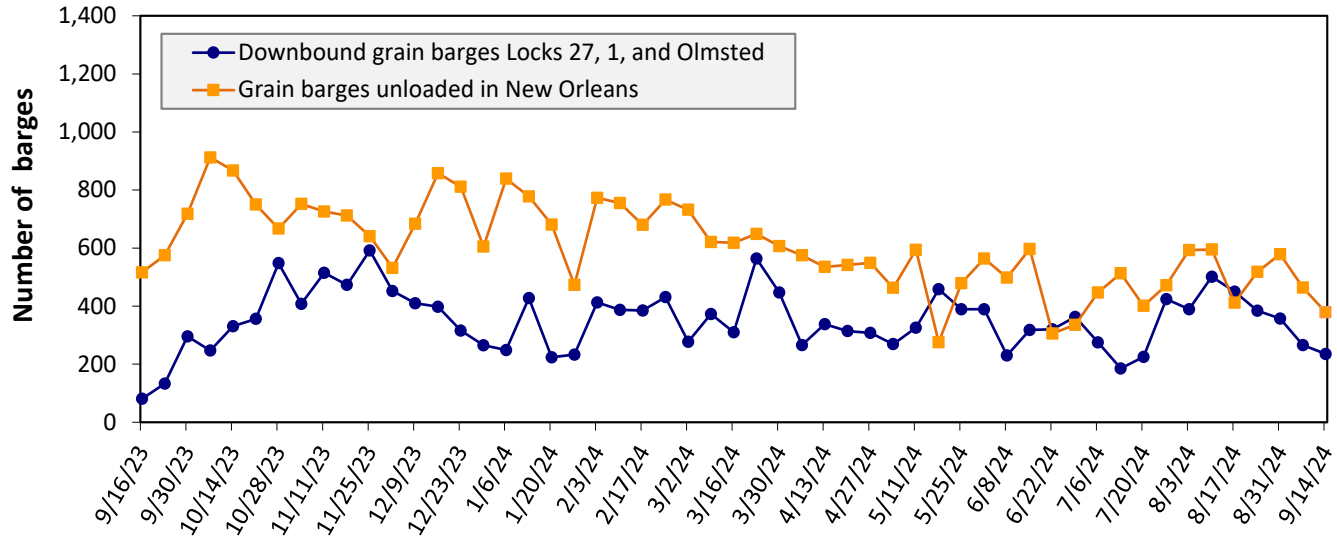
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 14: 419 barges transited the locks, 130 barges fewer than the previous week, and 14 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 14: 235 barges moved down river, 31 fewer than the previous week; 379 grain barges unloaded in the New Orleans Region, 18 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.

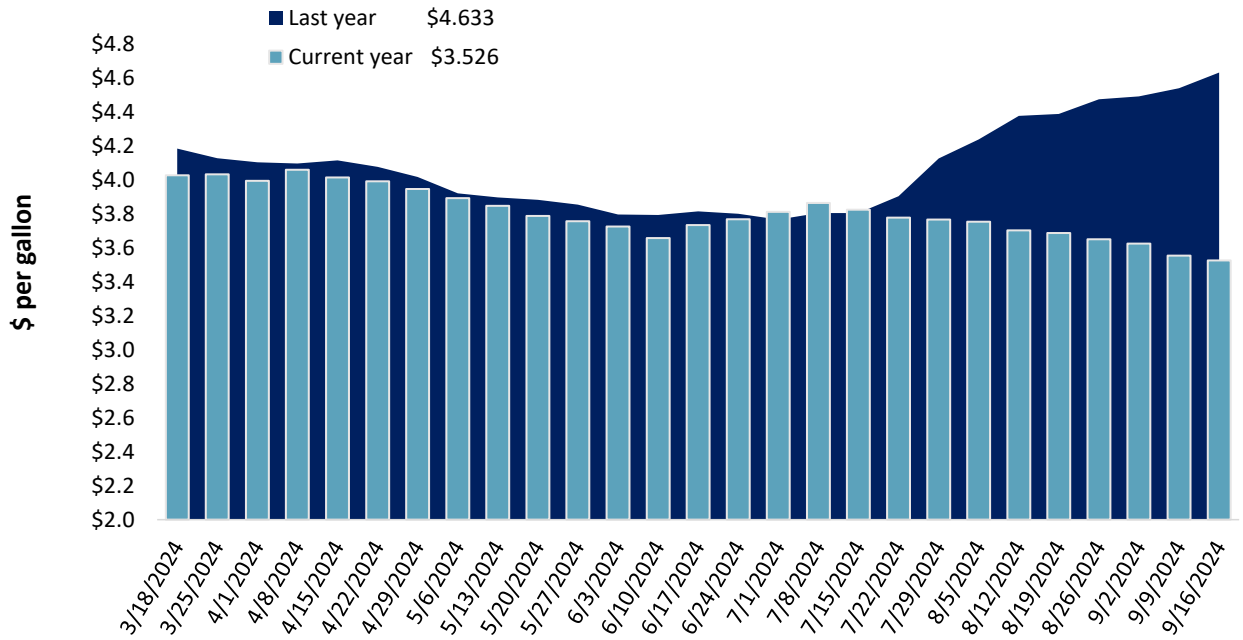
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 9/16/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.585	-0.034	-0.952
	New England	3.818	-0.053	-0.769
	Central Atlantic	3.810	-0.037	-0.938
	Lower Atlantic	3.479	-0.029	-0.977
II	Midwest	3.481	-0.047	-1.011
III	Gulf Coast	3.172	-0.018	-1.180
IV	Rocky Mountain	3.588	0.021	-1.276
V	West Coast	4.244	-0.013	-1.451
	West Coast less California	3.818	-0.019	-1.442
	California	4.733	-0.006	-1.459
Total	United States	3.526	-0.029	-1.107

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 16, the U.S. average diesel fuel price decreased 2.9 cents from the previous week to $3.526 per gallon, 110.7 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 9/05/2024	1,141	682	1,518	1,236	48	4,624	12,803	13,930	31,357
	This week year ago	591	708	1,419	787	216	3,722	10,434	16,237	30,392
	Last 4 wks. as % of same period 2023/24	193	111	117	152	27	130	52	29	49
Current shipped (cumulative) exports sales	2024/25 YTD	1,462	1,050	2,024	1,485	120	6,142	559	314	7,015
	2023/24 YTD	900	1,209	1,554	903	24	4,591	726	408	5,726
	YTD 2024/25 as % of 2023/24	162	87	130	164	0	134	77	77	123
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435

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.
Source: USDA, Foreign Agricultural Service.

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

For the week ending 9/5/2024	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	6,734	15,423	-56	17,746
Japan	1,435	6,907	-79	9,366
China	13	7,585	-100	8,233
Colombia	783	2,472	-68	4,383
Korea	141	821	-83	1,565
Top 5 importers	**9,105**	**33,209**	**-73**	**41,293**
Total U.S. corn export sales	13,361	40,520	-67	51,170
% of YTD current month's export projection	23%	70%	-	-
Change from prior week	666	753	-	-
Top 5 importers' share of U.S. corn export sales	**68%**	**82%**	**-**	**81%**
USDA forecast September 2024	**58,423**	**58,169**	**0**	**-**
Corn use for ethanol USDA forecast, September 2024	**138,430**	**138,811**	**-0**	**-**

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (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" = 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 9/5/2024	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		
China	4,969	31,519	-84	28,636
Mexico	1,159	4,634	-75	4,917
Japan	415	2,390	-83	2,231
Egypt	358	1,150	-69	2,228
Indonesia	386	1,875	-79	1,910
Top 5 importers	**7,287**	**41,567**	**-82**	**39,922**
Total U.S. soybean export sales	**14,245**	**53,209**	**-73**	**51,302**
% of YTD current month's export projection	28%	115%	-	-
Change from prior week	1,474	704	-	-
Top 5 importers' share of U.S. soybean export sales	**51%**	**78%**	**-**	**78%**
USDA forecast, September 2024	**50,349**	**46,266**	**9**	**-**

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (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" = 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 15. Top 10 importers of all U.S. wheat

For the week ending 09/05/2024	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	1,772	1,439	23	3,298
Philippines	1,424	1,150	24	2,494
Japan	908	884	3	2,125
China	139	272	-49	1,374
Korea	1,070	520	106	1,274
Taiwan	558	561	-0	921
Nigeria	224	104	114	920
Thailand	298	158	88	552
Colombia	236	154	53	522
Vietnam	261	143	82	313
Top 10 importers	**6,889**	**5,387**	**28**	**13,792**
Total U.S. wheat export sales	**10,766**	**7,875**	**37**	**18,323**
% of YTD current month's export projection	48%	41%		-
Change from prior week	475	0	-	-
Top 10 importers' share of U.S. wheat export sales	**64%**	**68%**	**-**	**75%**
USDA forecast, September 2024	**22,453**	**19,241**	**17**	**-**

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (June 1 – May 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" = 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.

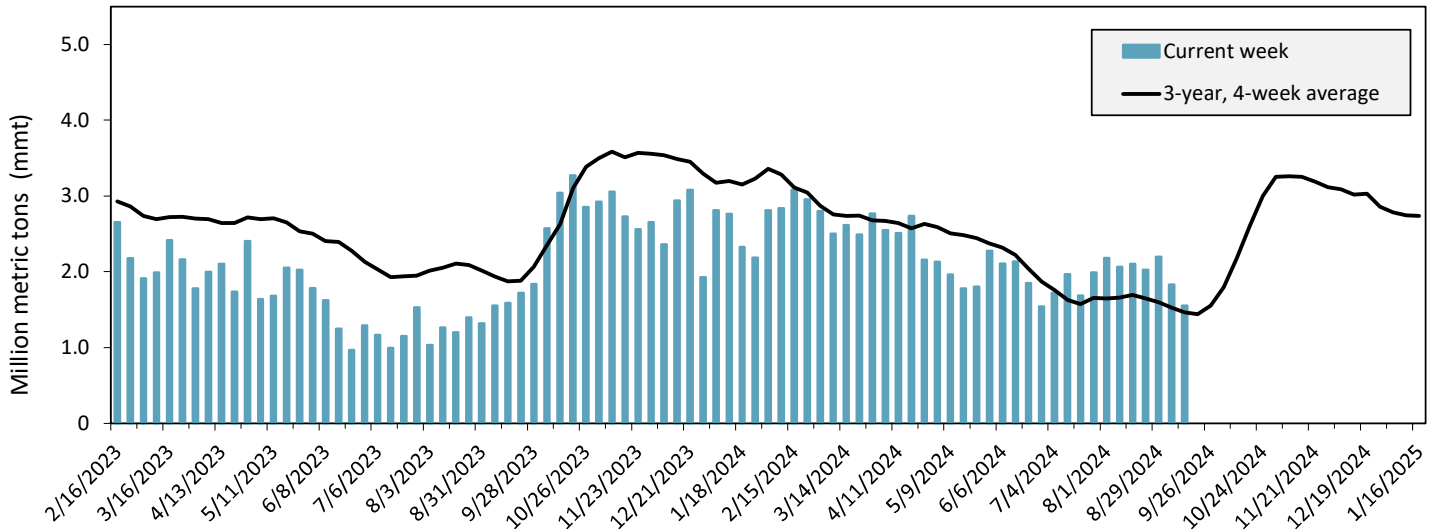
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 09/12/2024	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	62	0	n/a	11,704	3,983	294	n/a	224	5,267
	Soybeans	0	0	n/a	2,669	3,356	80	n/a	87	10,286
	Wheat	325	317	103	8,251	6,902	120	155	120	9,814
	All Grain	**387**	**317**	**122**	**23,710**	**14,437**	**164**	**195**	**123**	**25,913**
Mississippi Gulf	Corn	237	553	43	18,944	17,708	107	131	168	23,630
	Soybeans	295	252	117	13,804	15,062	92	91	108	26,878
	Wheat	88	61	143	3,629	2,582	141	169	116	3,335
	All Grain	**678**	**867**	**78**	**36,496**	**35,352**	**103**	**120**	**140**	**53,843**
Texas Gulf	Corn	11	10	110	392	236	166	207	136	397
	Soybeans	0	0	n/a	0	50	0	n/a	n/a	267
	Wheat	76	89	86	1,339	1,326	101	426	88	1,593
	All Grain	**93**	**101**	**92**	**4,405**	**3,793**	**116**	**110**	**104**	**5,971**
Interior	Corn	210	276	76	9,700	6,656	146	125	145	10,474
	Soybeans	105	113	94	4,984	3,815	131	135	152	6,508
	Wheat	67	117	58	2,226	1,755	127	113	99	2,281
	All Grain	**391**	**508**	**77**	**17,071**	**12,344**	**138**	**123**	**133**	**19,467**
Great Lakes	Corn	0	0	n/a	0	23	0	n/a	n/a	57
	Soybeans	0	0	n/a	18	62	29	n/a	n/a	192
	Wheat	0	37	0	335	192	174	142	98	581
	All Grain	**0**	**37**	**0**	**353**	**277**	**127**	**68**	**58**	**831**
Atlantic	Corn	0	0	n/a	213	82	260	n/a	3	166
	Soybeans	1	0	n/a	441	1,194	37	12	11	2,058
	Wheat	0	0	n/a	65	86	76	311	472	101
	All Grain	**2**	**0**	**n/a**	**720**	**1,361**	**53**	**146**	**99**	**2,325**
All Regions	Corn	521	839	62	40,953	28,699	143	139	159	40,004
	Soybeans	401	365	110	21,970	23,643	93	107	113	46,459
	Wheat	557	621	90	15,845	12,845	123	160	112	17,738
	All Grain	**1,552**	**1,829**	**85**	**82,807**	**67,682**	**122**	**130**	**130**	**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.

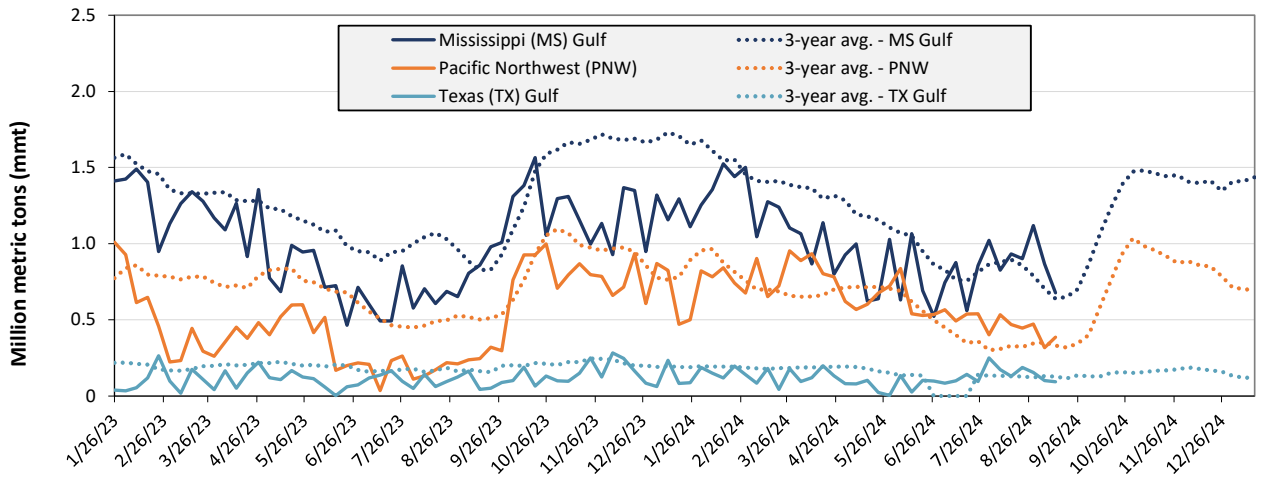
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Sep. 12: 1.6 mmt of grain inspected, down 15 percent from the previous week, down 11 percent from the same week last year, and up 6 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 09/12/24 inspections (mmt):
MS Gulf: 0.68
PNW: 0.39
TX Gulf: 0.09

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 22	down 8	down 20	up 22
Last year (same 7 days)	down 31	up 29	down 27	up 84
3-year average (4-week moving average)	up 6	down 27	un-changed	up 17

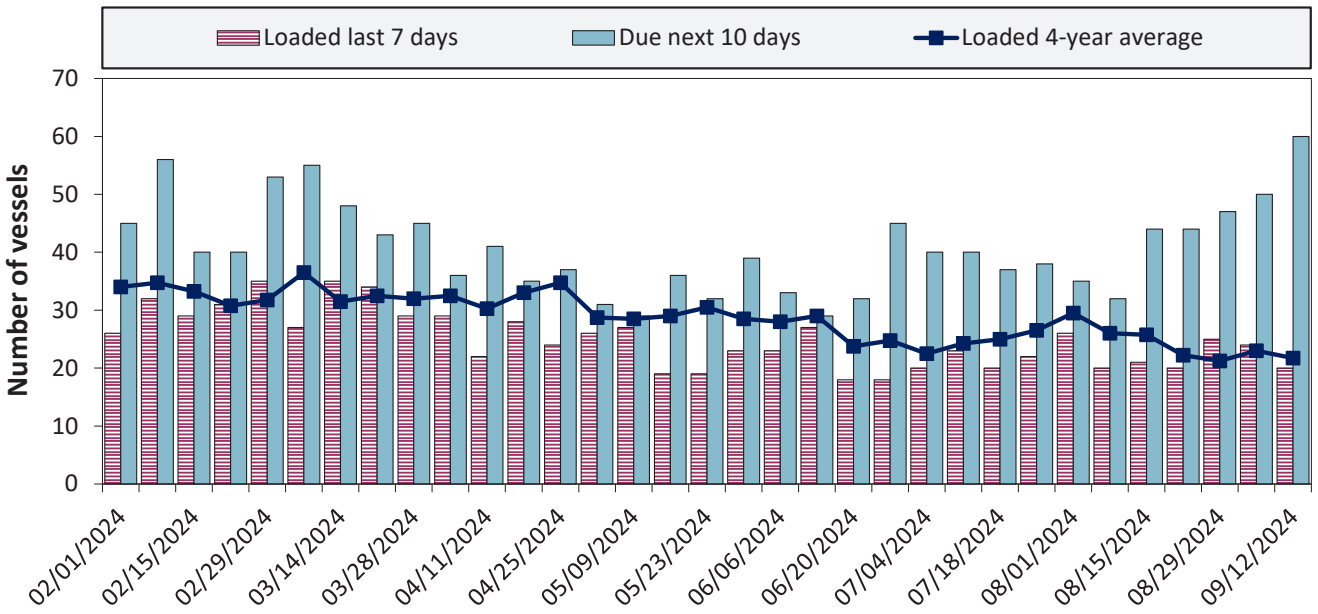
Source: USDA, Federal Grain Inspection Service.

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
9/12/2024	31	20	60	8
9/5/2024	31	24	50	13
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.

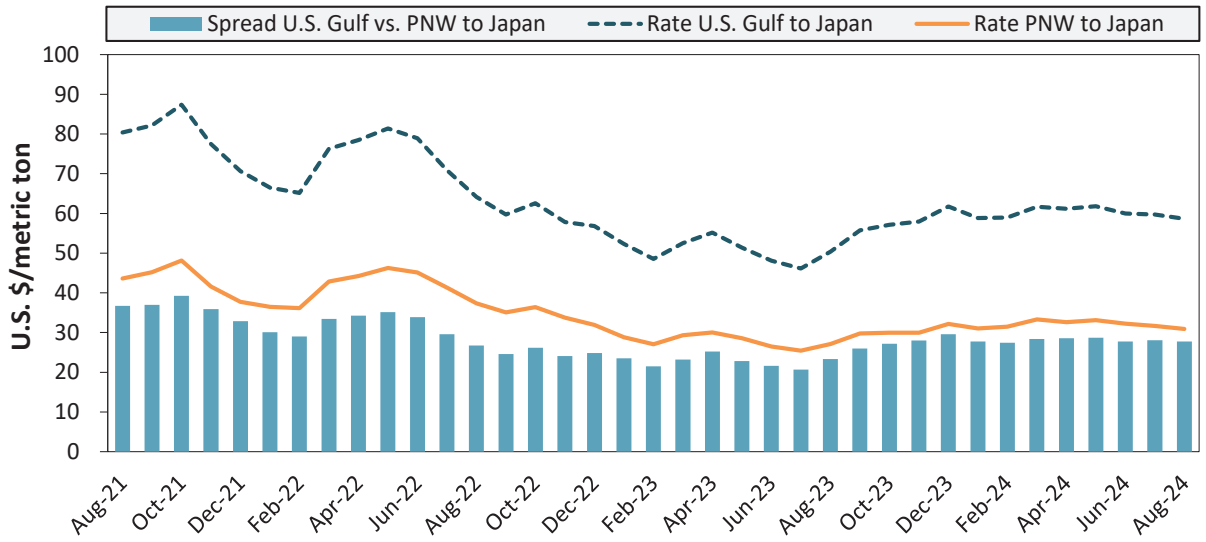
Figure 17. U.S . Gulf vessel loading activity



Week ending 9/12/24, number of vessels	Loaded	Due
Change from last year	-20%	58%
Change from 4-year average	-8%	43%

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.

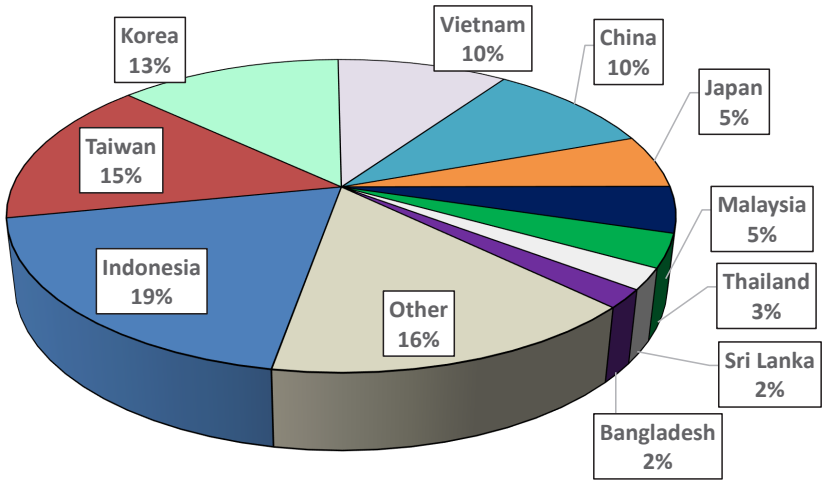
Table 18. Ocean freight rates for selected shipments, week ending 09/14/2024

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	Sep 9, 2024	Oct 1/9, 2024	66,000	53.00
U.S. Gulf	China	Heavy grain	Aug 26, 2024	Sep 1/Oct 1, 2024	58,000	60.50
U.S. Gulf	China	Heavy grain	Sep 9, 2024	Sep 15/oct 15, 2024	68,000	57.00
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	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.

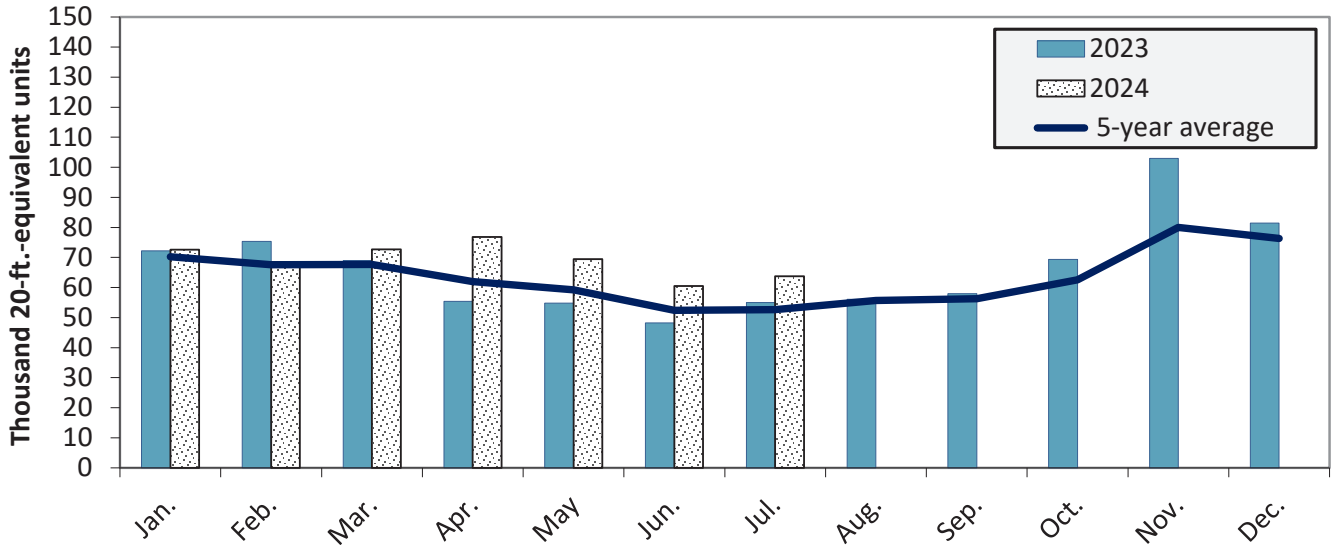
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined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

Figure 19. Top 10 destination markets for U.S. containerized grain exports, Jan-July 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 Jul. 2024 were up 16.0 percent from last year and up 21.1 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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