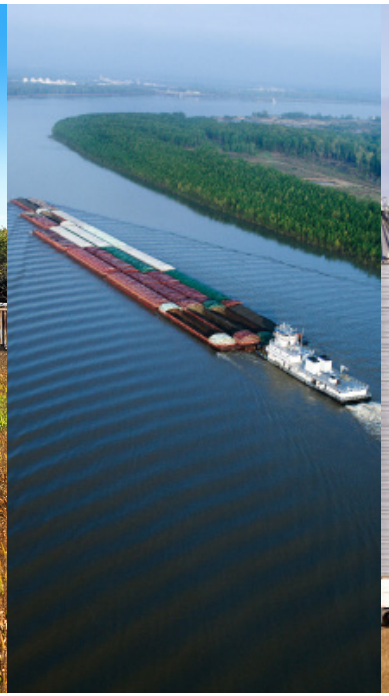
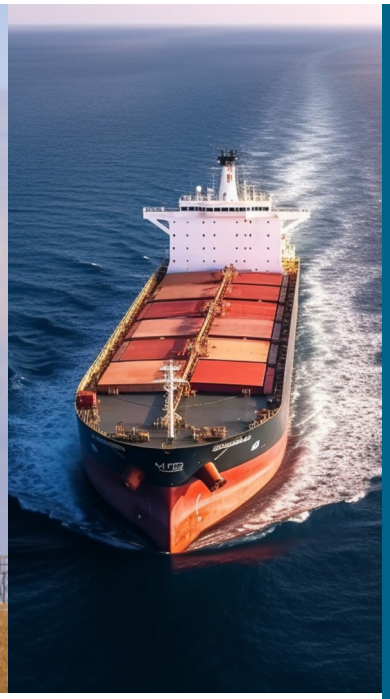
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

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TRB Releases Special Report on Long Manifest Freight Trains. On September 17, the Transportation Research Board (TRB)—a division of the National Academy of Sciences, Engineering, and Medicine— released a final report (in response to a 2021 congressional mandate) on the impacts of long manifest freight trains—typically over 7,500 feet in length. Manifest trains are made up of different car types and carry different commodities.

The TRB report notes that average train lengths remained "fairly stable" from 2005 to 2019 before increasing significantly in recent years, accompanying railroads' adoption of precision-scheduled railroading. The report found that the complexity of operating long manifest freight trains "can create new and heightened safety risks," and the report provided several recommendations for Federal regulators to help mitigate these risks.

Most grain is transported by unit/shuttle trains, which comprise up to 110 grain cars and are under 7,000 feet long. However, manifest trains do, also, sometimes transport grain—especially, grain products (e.g., distillers' dried grains with solubles, soybean meal, and flour).

U.S. Army Corps of Engineers Announces Columbia-Snake River Lock Closures. The Portland District (OR) of the U.S. Army Corps of Engineers (USACE) has scheduled its annual maintenance lock closure for March 2025. Dates for the Walla Walla District's (WA) lock closures will be published separately.

The Portland District's routine annual maintenance, inspection, and repair work will take place at the Bonneville Lock and Dam, Dalles Lock and Dam, and the John Day Lock and Dam from March 9 through March 22.

Year-to-date (through August), 1.8 million tons of wheat have moved through the Bonneville Lock and Dam to Portland for export.

FHWA Aid To Repair and Rebuild Roads and Bridges After Disasters. The Federal Highway Administration's (FHWA) final fiscal year 2024 allocations of its Emergency Relief (ER) program will fund the repair and rebuilding of roads and bridges in 10 States that are key to grain transportation. The projects will remediate damage sustained by natural disasters from 2022 to 2024.

As part of an overall $802 million disbursement to 36 States, Guam, and Puerto Rico, the ER funding aligns with the U.S. Department of Transportation's holistic, long-term commitment to making the Nation's transportation infrastructure more resilient and better able to withstand damage from catastrophic events caused by climate change.

In States vital to grain transportation, FHWA's ER program will fund the repair and rebuilding of roads and bridges at the following levels: California, $183.4 million; Illinois, $3.0 million; Iowa, $0.9 million; Michigan, $13.9 million; Minnesota, $4.9 million; Mississippi, $6.9 million; North Dakota, $0.2 million; Ohio, $3.1 million; Oklahoma, $2.6 million; Wisconsin, $1.5 million.

Nebraska Grain Shuttle Loading Facility To Store up to 3.7 Million Bushels. Construction of a new Farmers Cooperative grain shuttle loading facility near Pawnee City, NE is expected to begin this fall. The facility is expected to be fully operational by fall 2026.

The facility's location was chosen for its "excellent rail access" (and proximity to a main highway), and the facility will include a 110-car shuttle shipper on BNSF Railway.

Capable of storing 3.7 million bushels of grain, the facility will feature four large concrete tubes that will hold 820,000 bushels each. The facility also offers grain pits, with independent receiving legs, that unload 4,000 to 20,000 bushels of grain per hour. Two scales will help expedite truck flow.

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 12, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 32.54 million metric tons (mmt), up 8 percent from the same time last year.

Net **corn export sales** for MY 2024/25, which began September 1, were 0.85 mmt. Net **soybean export sales** for MY 2024/25, which also began September 1, were 1.75 mmt. Net **wheat export sales** for MY 2024/25 were 0.25 mmt, down 48 percent from last week.

Rail

U.S. Class I railroads originated 22,476 **grain carloads** during the week ending September 14. This was a 2-percent decrease from the previous week, 14 percent more than last year, and 14 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $325 above tariff for the week ending September 19. This was $417 less than last week. Average non-shuttle secondary railcar bids/offers per car were $500 above tariff. This was $150 less than last week.

Average October shuttle secondary railcar bids/offers (per car) were $1,366 above tariff for the week ending September 19. This was $93 less than last week and $586 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $413 above tariff. This was $13 more than last week and $67 more than this week last year.

Barge

For the week ending September 21, **barged grain movements** totaled 501,668 tons. This was 37 percent more than the previous week and 155 percent more than the same period last year.

For the week ending September 21, 312 grain barges **moved down river**—77 more than last week. There were 712 grain barges **unloaded** in the New Orleans region, 88 percent more than last week.

Ocean

For the week ending September 19, 25 **oceangoing grain vessels** were loaded in the Gulf—4 percent fewer than the same period last year. Within the next 10 days (starting September 20), 49 vessels were expected to be loaded—9 percent more than the same period last year.

As of September 19, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $55.50, 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was $30.50 per mt, 3 percent more than the previous week.

Fuel

For the week ending September 23, the U.S. average **diesel price** increased 1.3 cents from the previous week to $3.539 per gallon, 104.7 cents below the same week last year.

Landed Costs of Grain to Mexico Fell From Second Quarter 2023 to Second Quarter 2024

Mexico is a major importer of U.S. grain. Low transportation and landed costs for U.S.-Mexico routes are vital to the competitiveness of U.S. grain (corn, soybeans, and wheat) in Mexico and globally. U.S. grain is transported to Mexico either across the land border or by sea to Mexican ports for inland distribution. This article examines the costs of transporting U.S. grain to Mexico over land to various U.S.-

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

	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Corn									
	IL origin					IA origin				
Truck	14.19	16.11	16.47	16.1	2.2	5.82	6.61	7.06	21.3	6.8
Rail	-	-	-	-	-	58.75	60.16	60.21	2.5	0.1
Barge	17.24	20.61	15.96	-7.4	-22.6	-	-	-	-	-
Ocean	19.14	19.43	17.70	-7.5	-8.9	-	-	-	-	-
Total transportation cost	50.57	56.15	50.13	-0.9	-10.7	64.57	66.77	67.27	4.2	0.7
Farm value	254.32	172.30	171.12	-32.7	-0.7	261.01	179.26	180.17	-31.0	0.5
Landed cost	304.89	228.45	221.25	-27.4	-3.2	325.58	246.03	247.44	-24.0	0.6
Transport % of landed cost	17	25	23	6.07	-1.92	20	27	27	7.35	0.0

	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Soybeans									
	IL origin					MO origin				
Truck	14.19	16.11	16.47	16.1	2.2	5.82	6.61	7.06	21.3	6.8
Rail	-	-	-	-	-	53.34	54.59	54.52	2.2	-0.1
Barge	17.24	20.61	15.96	-7.4	-22.6	-	-	-	-	-
Ocean	19.14	19.43	17.70	-7.5	-8.9	-	-	-	-	-
Total transportation cost	50.57	56.15	50.13	-0.9	-10.7	59.16	61.20	61.58	4.1	0.6
Farm value	536.46	451.95	436.03	-18.7	-3.5	534.01	449.50	436.03	-18.3	-3.0
Landed cost	587.03	508.10	486.16	-17.2	-4.3	593.17	510.70	497.61	-16.1	-2.6
Transport % of landed cost	9	11	10	1.70	-0.74	10	12	12	2.40	0.4

table 1 continues on page 5

table 1 continued from page 4

	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 2nd qtr.	2024 1st qtr.	2024 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Wheat									
	KS origin					KS origin				
Truck	5.82	6.61	7.06	21.3	6.8	5.82	6.61	7.06	21.3	6.8
Rail	45.55	42.21	43.16	-5.2	2.3	46.85	48.59	47.26	0.9	-2.7
Ocean	19.14	19.43	17.70	-7.5	-8.9	-	-	-	-	-
Total transportation cost	70.51	68.25	67.92	-3.7	-0.5	52.67	55.20	54.32	3.1	-1.6
Farm value	304.48	212.50	217.28	-28.6	2.2	304.48	212.50	217.28	-28.6	2.2
Landed cost	374.99	280.75	285.20	-23.9	1.6	357.15	267.70	271.60	-24.0	1.5
Transport % of landed cost	19	24	24	5	0	15	21	20	5	-0.6

Note: : In 2022, due to tax changes in Mexico, all three Class I railroads that ship from the U.S. to Mexico (BNSF, Union Pacific, and Kansas City Southern) report only rates to the border for interchange, called Rule 11 rates. The estimated total includes the estimated tariff through-rate for shuttle train service to U.S.-Mexico border locations and the reported fuel surcharge. The estimated rate does not include any additional costs for shuttle car service. Second quarter 2023 rates were revised from what were previously published. Source for ocean freight rates: O'Neil Commodity Consulting. Source for farm values: USDA, National Agricultural Statistics Service. Landed cost is total transportation cost plus farm value. "-" indicates data not required or applicable. Total may not add exactly because of rounding.
Source: Compiled by the USDA, Agricultural Marketing Service.

Mexico border locations (land routes) and by sea to Veracruz (water routes), tracking changes over time (table 1).

Quarter-to-quarter transportation costs. From first quarter 2024 to second quarter 2024 (quarter to quarter), total transportation costs fell for all grains shipped by water routes and for wheat shipped by land routes. Total transportation costs rose for U.S. corn and soybeans by land routes. Falling water-route shipping costs for corn, soybeans, and wheat reflected lower barge and ocean freight rates.[1]

Barge rates showed their typical seasonal decline after the Upper Mississippi River (UMR) reopened, near the end of March, from its annual winter closure.[2] Land-route shipping costs for wheat decreased with falling rail rates (public tariff, plus fuel surcharge). Generally, rail rates responded to the drop in fuel surcharges, amid lower fuel prices (GTR fig. 14 and Grain Truck and Ocean Rate Advisory, second quarter 2024). For corn and soybeans shipped by land, increases in total transportation costs mainly reflected rising truck rates.

Year-to-year transportation costs. From second quarter 2023 to second quarter 2024 (year to year), total costs of shipping all grain to Mexico by the water routes fell, because of lower barge, rail, and ocean freight rates. Rising truck and rail rates combined to raise costs for land-route shipments.

Quarter-to-quarter landed costs. Quarter to quarter, landed costs fell for corn and soybeans shipped by water routes and for soybeans by land routes. For seaborne corn and soybeans, landed costs dropped, because of declines in transportation costs and farm values. For seaborne wheat, landed costs rose only because of rising farm values.

For the land routes, changes in the landed costs varied by commodity. For soybeans shipped by land routes, landed costs fell, because of declining farm values. However, for both corn and wheat by land routes, landed costs rose. For land-route corn, rising transportation costs and farm values pushed up

1 Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.
2 Repositioning empty barges is easier when UMR is open, shippers have improved access to barges, which lowers barge rates.

the landed costs. For land-route wheat, only rising farm values drove increased landed costs (table 1 and figs. 1 and 2).

The share of landed costs comprising transportation ranged from 10 percent to 24 percent for the water routes and from 12 percent to 27 percent for the land routes. For seaborne corn and soybeans, transportation's share of landed costs declined because of a drop in transportation costs. Transportation's share of landed costs for seaborne wheat remained unchanged from quarter to quarter.

For land-route soybeans, a marginal rise in transportation's share of landed costs stemmed from an increase in transportation costs that outweighed falling farm values. For land-route wheat, transportation's share of landed costs fell marginally, because of declining transportation costs that offset rising farm values. For land-route corn, transportation's share of landed costs was stable from quarter to quarter.

Year-to-year landed costs. Year to year, for all waterborne grain, landed costs fell, because of both lower transportation costs and lower farm values. In the case of land-route grain, lower farm values (but not lower transportation costs) pushed down landed costs.

U.S. Exports to Mexico. According to USDA's Foreign Agricultural Service's Global Agricultural Trade System (GATS) data, in second quarter 2024, the United States exported to Mexico 6.08 million metric tons (mmt) of corn; 0.74 mmt of soybeans; and 0.87 mmt of wheat—declines of 1 percent, 46 percent, and 10 percent quarter to quarter, respectively. Year to year, U.S. exports destined to Mexico were up 39 percent for corn, up 22 percent for wheat, and unchanged for soybeans.

According to the GATS data—compared to January to July 2023, exports to Mexico for the same period in 2024 were up 35 percent for corn, up 18 percent for wheat, and unchanged for soybeans. Railed grain volumes to Mexico are up, despite severe service challenges. (For more on rail service to Mexico, see GTR, September 19, 2024, first highlight.)

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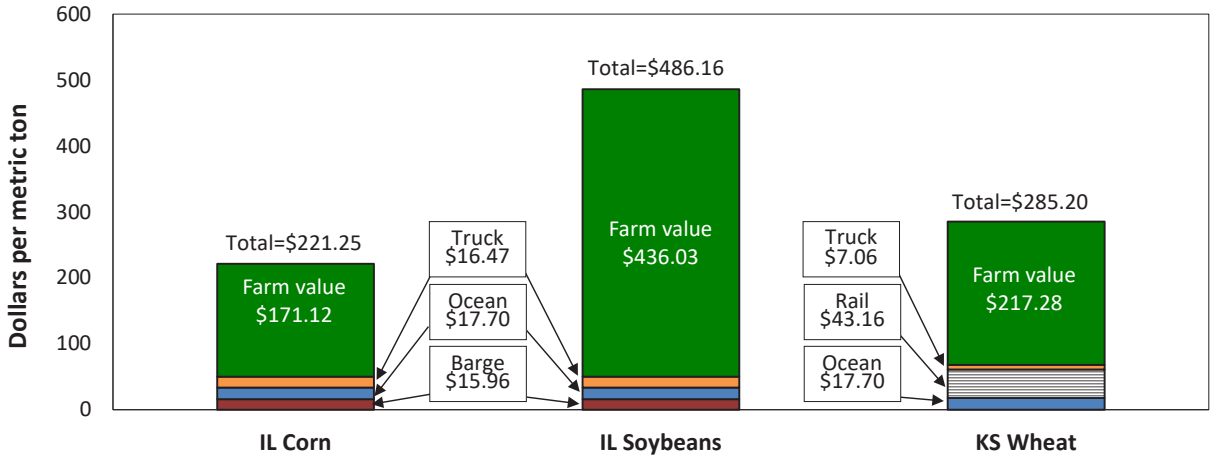
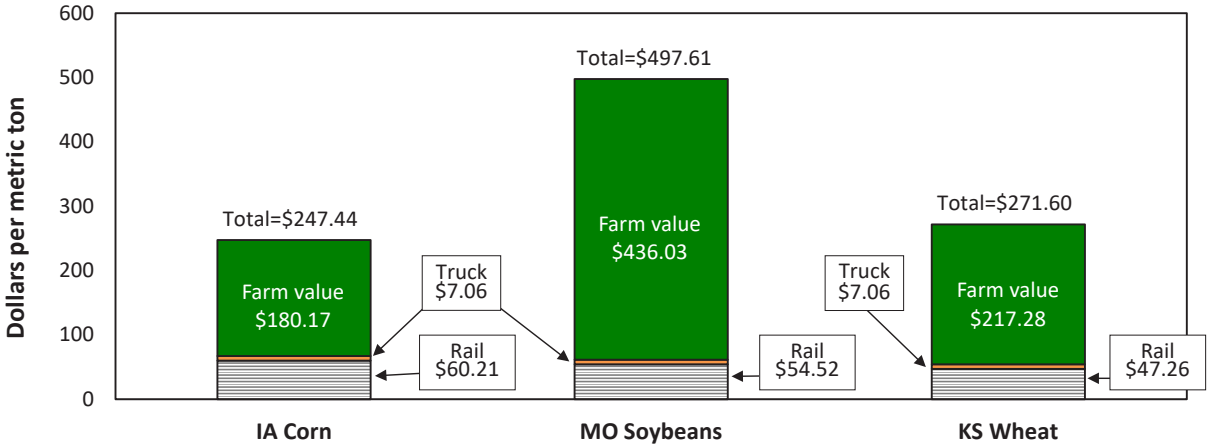
Figure 1. Second-quarter 2024 water-route landed costs to Veracruz, Mexico



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

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



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

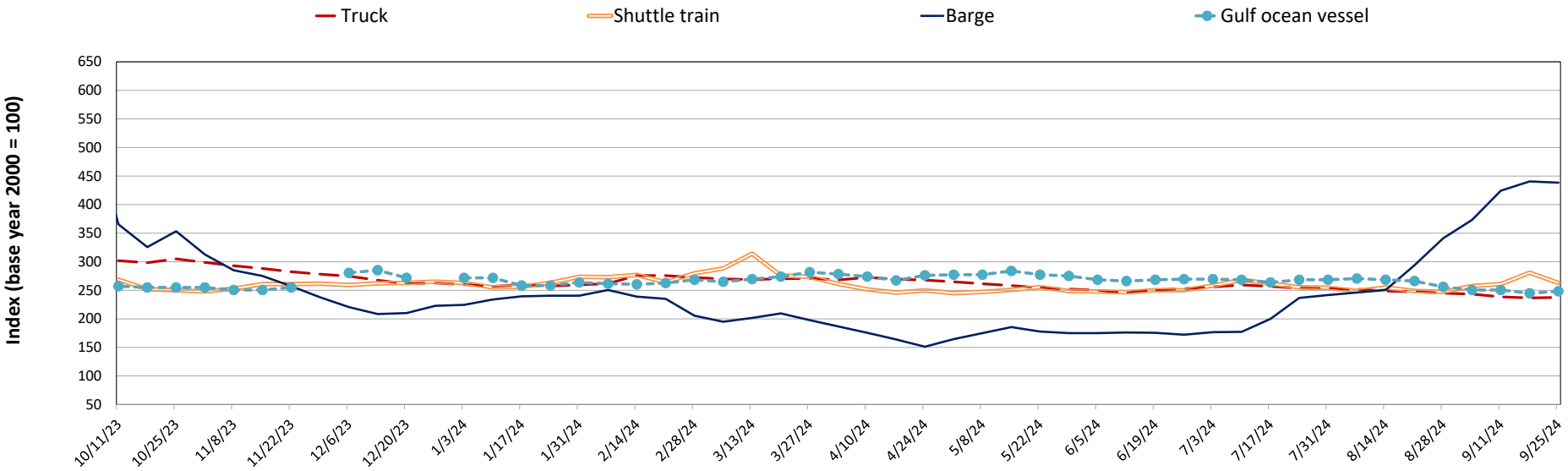
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
09/25/24	238	348	263	438	248	216
09/18/24	237	356	281	441	245	209
09/27/23	308	332	283	556	257	216

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.

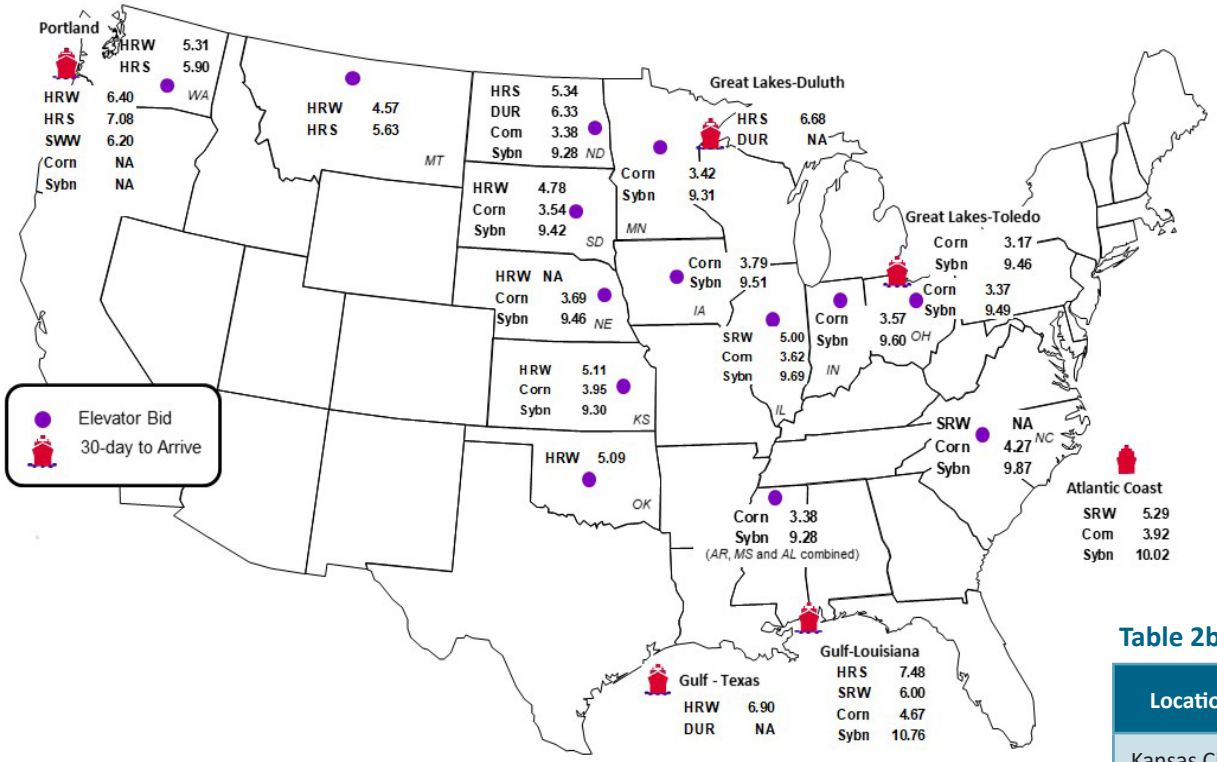
Figure 1. Grain transportation cost indicators as of week ending 09/25/24



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	9/20/2024	9/13/2024
Corn	IL–Gulf	-1.05	-0.93
Corn	NE–Gulf	-0.98	-0.86
Soybean	IA–Gulf	-1.25	-1.19
HRW	KS–Gulf	-1.79	-1.39
HRS	ND–Portland	-1.74	-1.50

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	9/20/2024	Week ago 9/13/2024	Year ago 9/22/2023
Kansas City	Wheat	Dec	5.780	5.830	7.094
Minneapolis	Wheat	Dec	6.080	6.354	7.704
Chicago	Wheat	Dec	5.824	5.790	5.816
Chicago	Corn	Dec	4.112	4.106	4.764
Chicago	Soybean	Nov	10.380	10.080	12.946

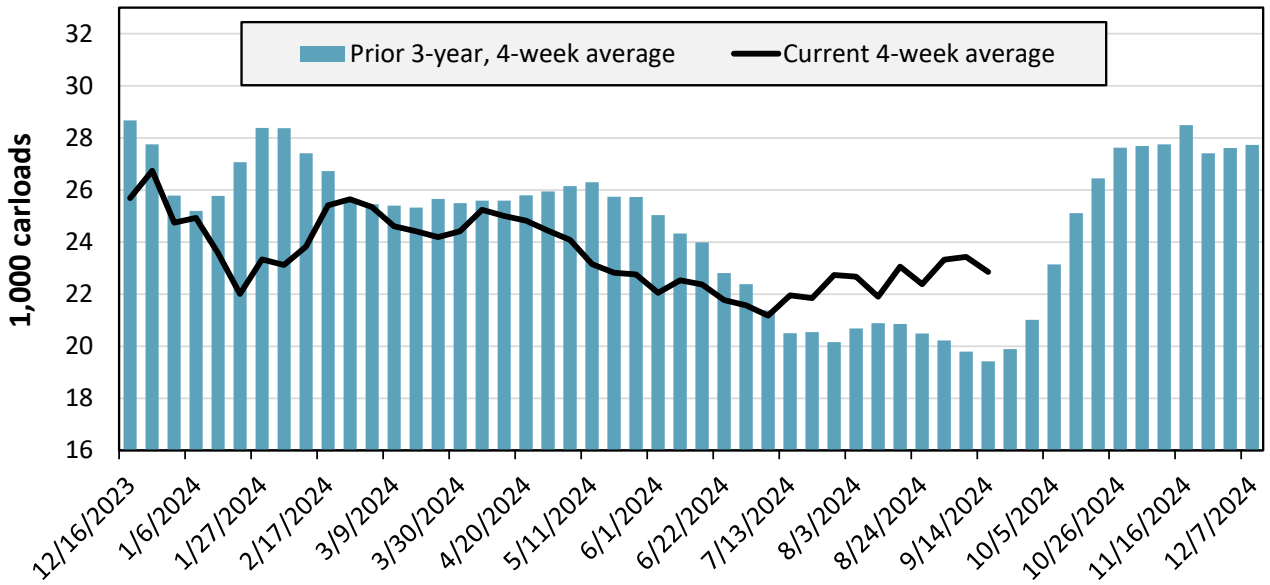
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 9/14/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,212	2,555	11,019	4,586	2,289	815	22,476
This week last year	1,072	1,275	10,142	3,805	2,462	928	19,684
2024 YTD	60,709	98,903	383,350	188,706	98,276	34,383	864,327
2023 YTD	63,071	93,346	319,422	188,951	84,339	45,730	794,859
2024 YTD as % of 2023 YTD	96	106	120	100	117	75	109
Last 4 weeks as % of 2023	130	177	128	126	93	118	126
Last 4 weeks as % of 3-yr. avg.	117	158	123	105	96	118	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



Source: Surface Transportation Board.

For the 4 weeks ending September 14, grain carloads were down 2 percent from the previous week, up 26 percent from last year, and up 18 percent from the 3-year average.

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

For the week ending: 9/14/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	24.8	22.0	16.2	22.1	7.8	7.5	22.5	17.6
	Average over last 4 weeks	24.5	24.2	15.6	21.3	10.6	9.5	35.3	20.1
	Average of same 4 weeks last year	43.8	51.8	7.2	14.1	6.8	30.7	15.5	24.3
Grain unit train speeds (miles per hour)	This week	23.1	19.1	24.4	22.9	25.2	18.6	22.3	22.2
	Average over last 4 weeks	23.6	19.9	24.1	22.2	23.7	19.3	22.0	22.1
	Average of same 4 weeks last year	24.7	16.4	25.5	23.0	24.3	18.9	24.4	22.4

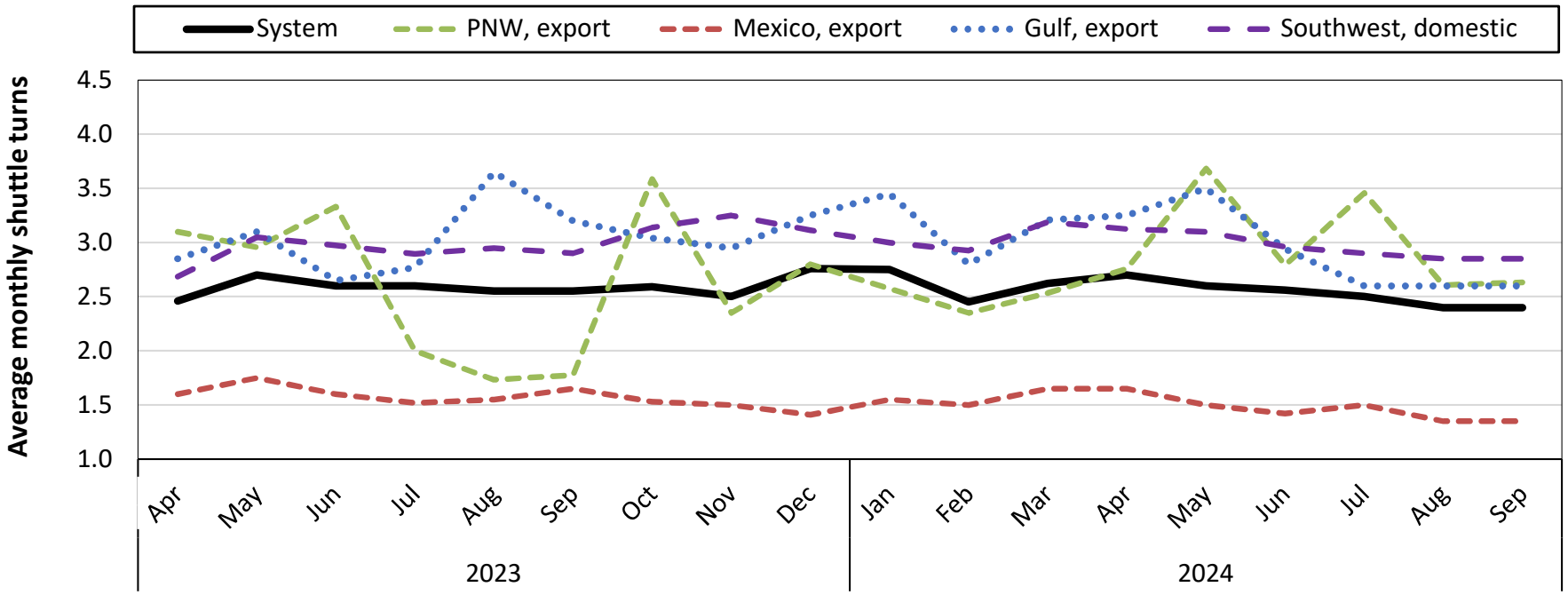
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics 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: 9/14/2024		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	37	6	558	74	2	43	25	746
	Average over last 4 weeks	27	9	437	108	4	85	95	763
	Average of same 4 weeks last year	26	17	437	60	4	109	23	675
Loaded grain cars not moved in over 48 hours (number)	This week	34	125	621	214	7	134	81	1,215
	Average over last 4 weeks	27	150	562	160	4	98	86	1,086
	Average of same 4 weeks last year	12	216	300	111	5	174	32	851
Grain unit trains held (number)	This week	0	0	8	12	0	3	1	24
	Average over last 4 weeks	0	0	12	10	0	4	4	30
	Average of same 4 weeks last year	0	4	5	6	0	5	7	27
Unfilled grain car orders (number)	This week	1	0	595	933	0	357	0	1,886
	Average over last 4 weeks	1	2	1,170	478	0	195	108	1,953
	Average of same 4 weeks last year	1	11	398	146	0	374	22	951

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

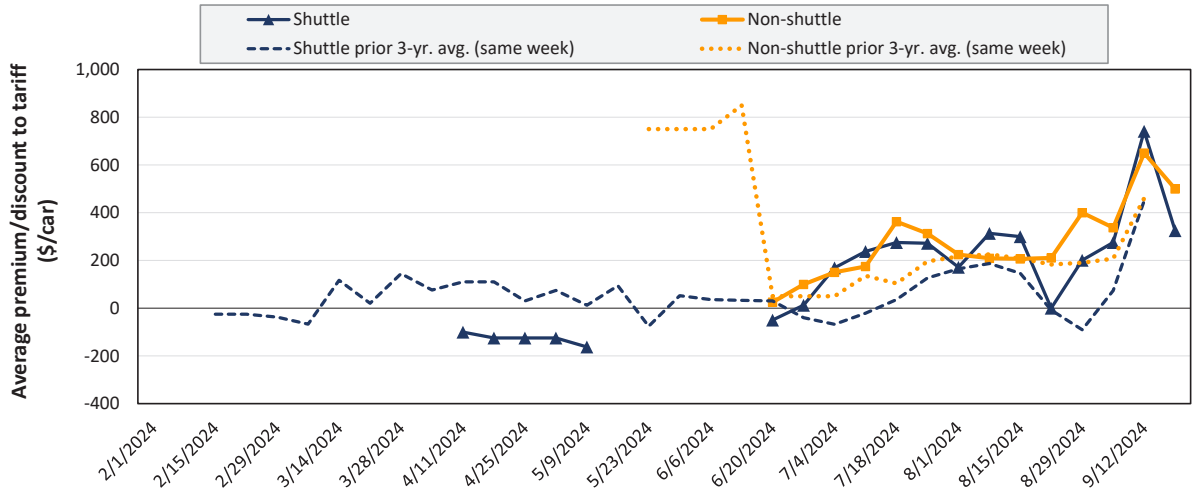


Average monthly system-wide grain shuttle turns reported in the first week of September 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.63 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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



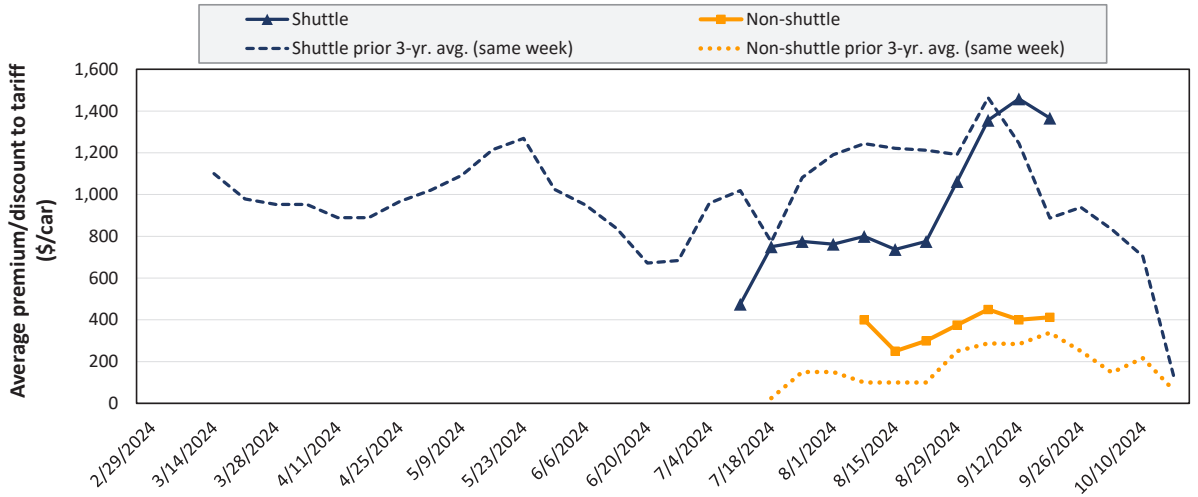
Average non-shuttle bids/offers fell $150 this week, and are $150 below the peak.

Average shuttle bids/offers fell $417 this week and are $417 below the peak.

9/19/2024	BNSF	UP
Non-Shuttle	$500	n/a
Shuttle	$200	$450

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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



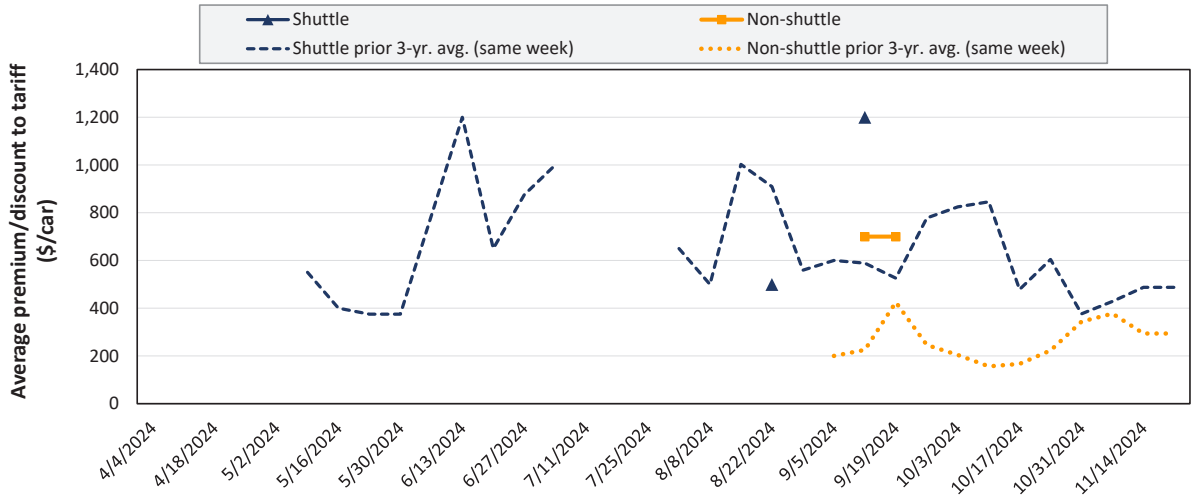
Average non-shuttle bids/offers rose $13 this week, and are $38 below the peak.

Average shuttle bids/offers fell $93 this week and are $93 below the peak.

9/19/2024	BNSF	UP
Non-Shuttle	$600	$225
Shuttle	$1,481	$1,250

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



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

There were no shuttle bids/offers this week.

9/19/2024	BNSF	UP
Non-Shuttle	$700	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: 9/19/2024		Delivery period					
		Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Feb-25
Non-shuttle	BNSF	500	600	700	700	n/a	n/a
	Change from last week	-150	0	0	n/a	n/a	n/a
	Change from same week 2023	n/a	83	100	n/a	n/a	n/a
	UP	n/a	225	n/a	n/a	n/a	n/a
	Change from last week	n/a	25	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	50	n/a	n/a	n/a	n/a
Shuttle	BNSF	200	1,481	n/a	1,000	n/a	n/a
	Change from last week	-675	-302	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	610	n/a	600	n/a	n/a
	UP	450	1,250	n/a	n/a	n/a	n/a
	Change from last week	-158	117	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	563	n/a	n/a	n/a	n/a
	CPKC	300	700	350	n/a	n/a	n/a
	Change from last week	n/a	200	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	250	-250	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

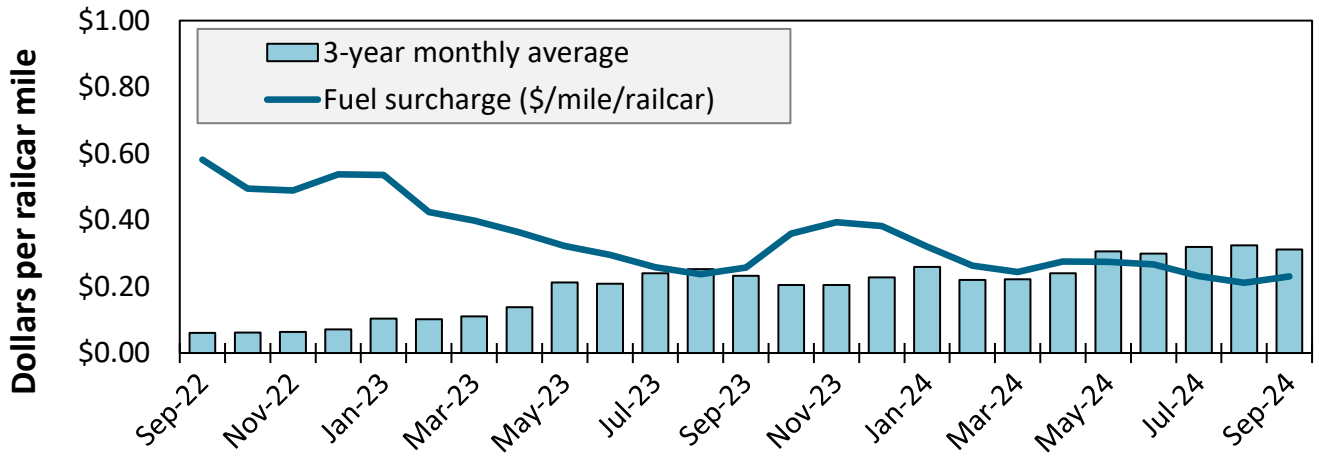
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel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

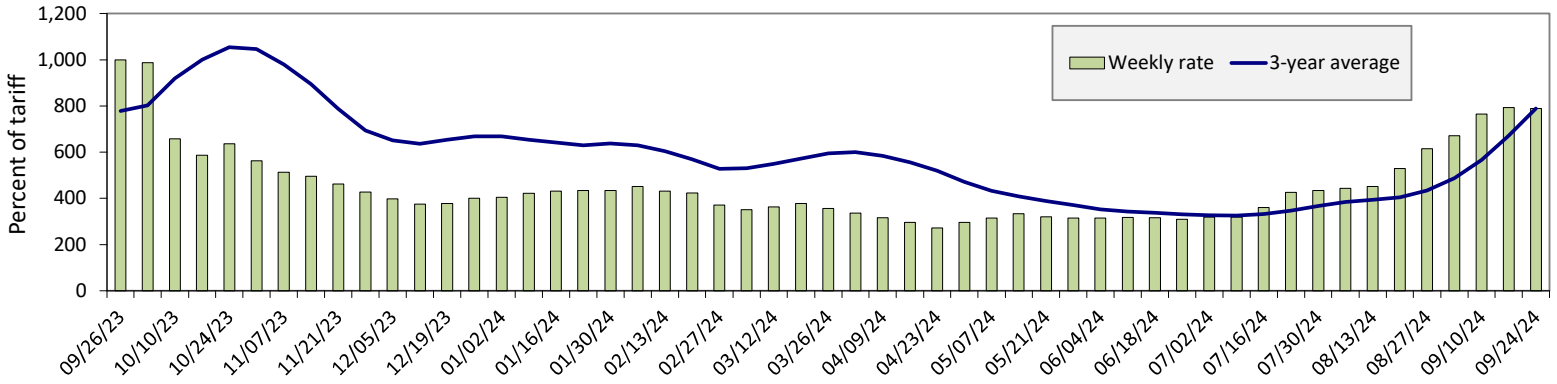
Figure 8. Railroad fuel surcharges, North American weighted average



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 24: there is no change from the previous week; 21 percent lower than last year; and there is no change from 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	9/24/2024	734	775	789	736	797	797	725
	9/17/2024	734	784	793	811	807	807	818
$/ton	9/24/2024	45.43	41.23	36.61	29.37	37.38	32.20	22.77
	9/17/2024	45.43	41.71	36.80	32.36	37.85	32.60	25.69
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	-19	-21	-21	-45	-32	-32	-57
	3-year avg.	-7	-4	-0	-10	-5	-5	-21
Rate	October	768	816	813	794	797	797	759
	December	n/a	n/a	511	422	440	440	389

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.

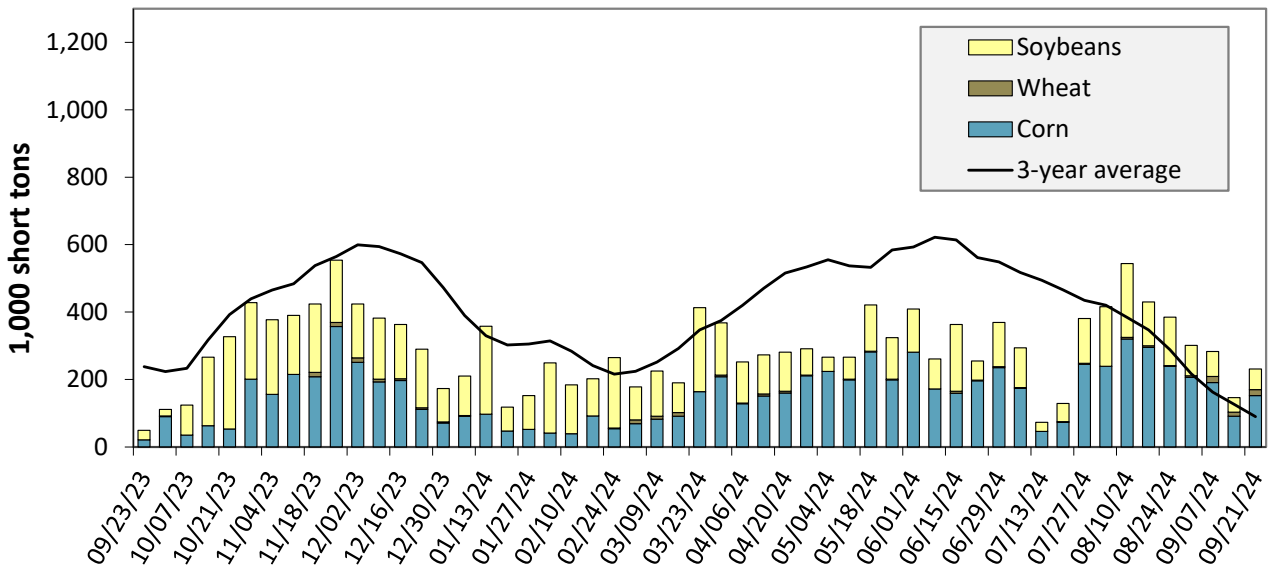
Figure 10. Benchmark tariff rates

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 21: 371 percent higher than last year and 157 percent higher than the 3-year average.

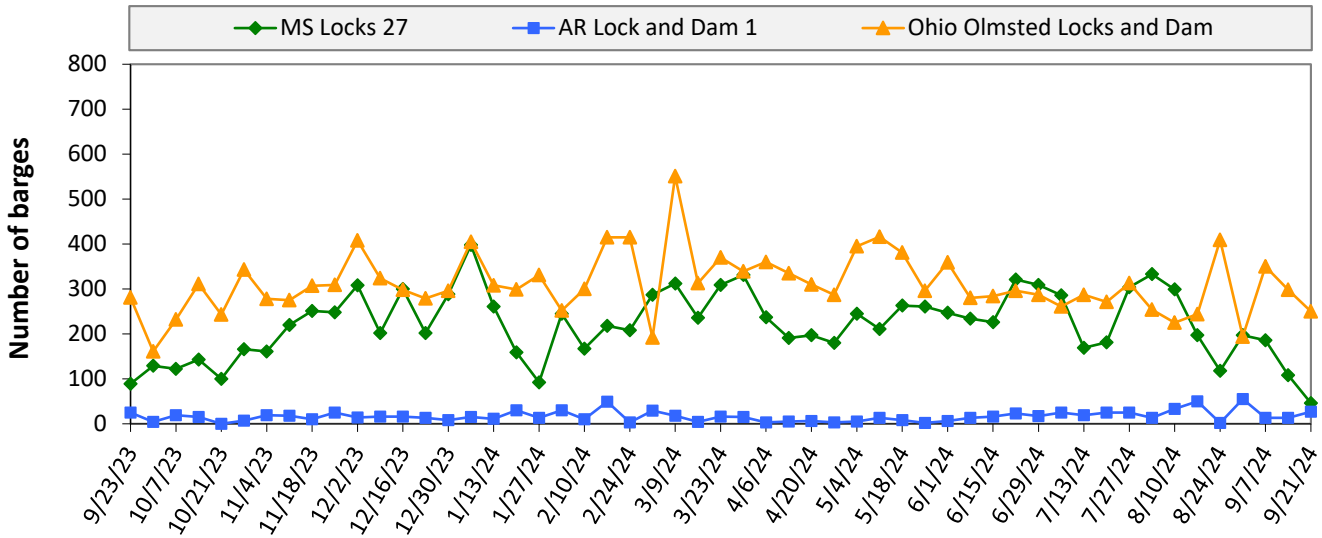
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 09/21/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	40	0	16	0	56
Mississippi River (Winfield, MO (L25))	119	21	49	0	188
Mississippi River (Alton, IL (L26))	161	18	61	0	239
Mississippi River (Granite City, IL (L27))	152	18	61	0	230
Illinois River (La Grange)	24	0	10	0	33
Ohio River (Olmsted)	181	6	59	0	246
Arkansas River (L1)	0	12	14	0	26
Weekly total - 2024	333	35	134	0	502
Weekly total - 2023	67	19	111	0	197
2024 YTD	10,848	1,338	7,337	170	19,693
2023 YTD	8,935	1,117	7,431	202	17,685
2024 as % of 2023 YTD	121	120	99	84	111
Last 4 weeks as % of 2023	623	117	154	300	280
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.

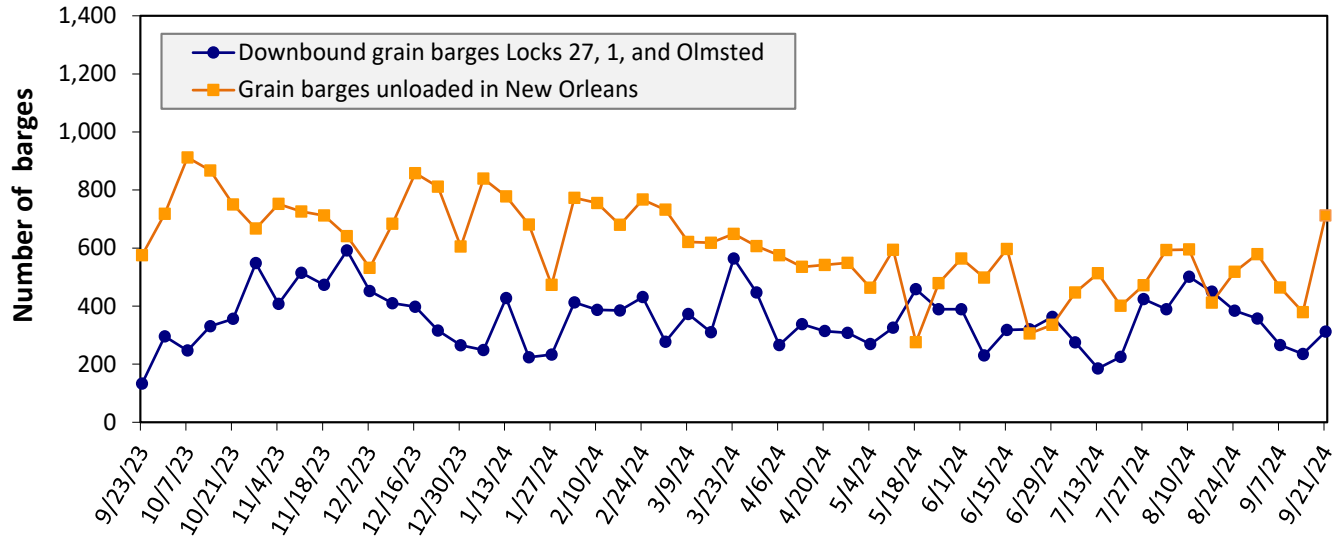
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 21: 323 barges transited the locks, 96 barges fewer than the previous week, and 16 percent lower than the 3-year average.

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

Figure 13. Grain barges for export in New Orleans region



For the week ending September 21: 312 barges moved down river, 77 more than the previous week; 712 grain barges unloaded in the New Orleans Region, 88 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

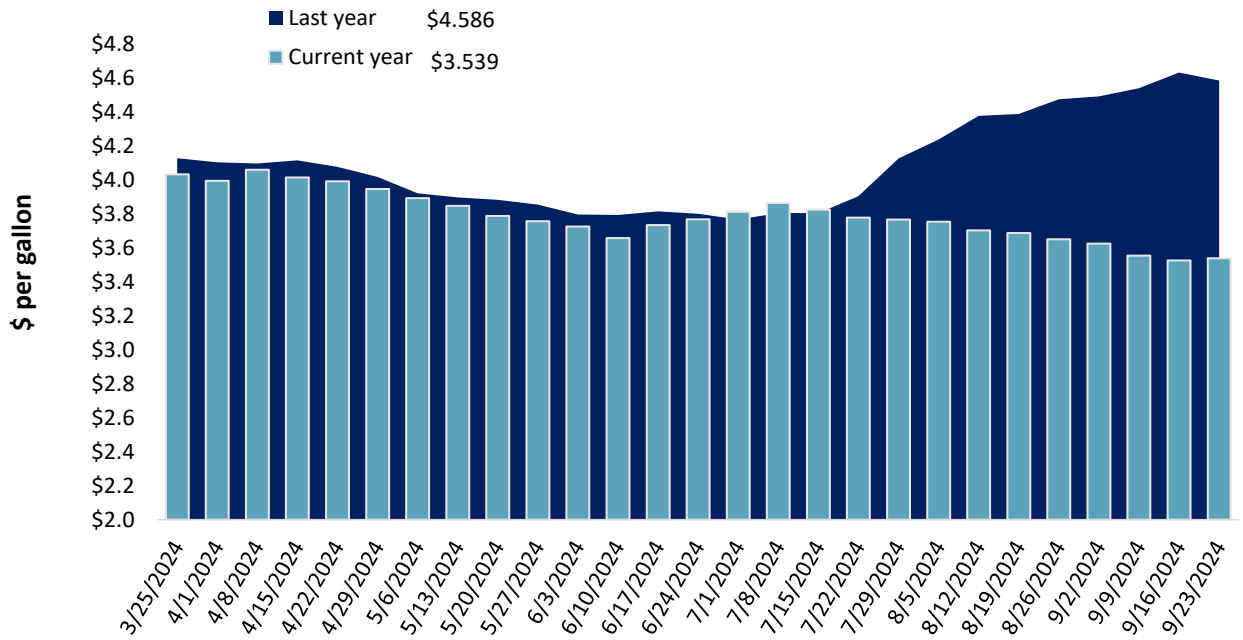
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 9/23/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.577	-0.008	-0.948
	New England	3.797	-0.021	-0.810
	Central Atlantic	3.813	0.003	-0.951
	Lower Atlantic	3.467	-0.012	-0.962
II	Midwest	3.511	0.030	-0.928
III	Gulf Coast	3.191	0.019	-1.090
IV	Rocky Mountain	3.608	0.020	-1.193
V	West Coast	4.239	-0.005	-1.448
	West Coast less California	3.815	-0.003	-1.414
	California	4.727	-0.006	-1.481
Total	United States	3.539	0.013	-1.047

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 23, the U.S. average diesel fuel price increased 1.3 cents from the previous week to $3.539 per gallon, 104.7 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 9/12/2024	964	640	1,431	1,136	57	4,228	13,077	15,232	32,538
	This week year ago	569	703	1,437	810	215	3,733	10,398	16,126	30,257
	Last 4 wks. as % of same period 2023/24	193	102	109	148	26	124	74	49	67
Current shipped (cumulative) exports sales	2024/25 YTD	1,635	1,144	2,262	1,623	120	6,784	1,132	761	8,676
	2023/24 YTD	947	1,262	1,631	1,003	44	4,887	1,329	897	7,113
	YTD 2024/25 as % of 2023/24	173	91	139	162	0	139	85	85	122
	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 9/12/2024	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	7,015	6,111	15	17,746
Japan	1,556	1,376	13	9,366
China	13	636	-98	8,233
Colombia	850	569	49	4,383
Korea	152	9	1624	1,565
Top 5 importers	**9,586**	**8,700**	**10**	**41,293**
Total U.S. corn export sales	14,209	11,727	21	51,170
% of YTD current month's export projection	24%	20%	-	-
Change from prior week	847	567	-	-
Top 5 importers' share of U.S. corn export sales	**67%**	**74%**	**-**	**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 9/12/2024	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	5,943	6,877	-14	28,636
Mexico	1,326	1,685	-21	4,917
Japan	479	544	-12	2,231
Egypt	440	97	355	2,228
Indonesia	457	314	45	1,910
Top 5 importers	**8,644**	**9,516**	**-9**	**39,922**
Total U.S. soybean export sales	**15,993**	**17,023**	**-6**	**51,302**
% of YTD current month's export projection	32%	37%	-	-
Change from prior week	1,748	378	-	-
Top 5 importers' share of U.S. soybean export sales	**54%**	**56%**	**-**	**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 09/12/2024	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	1,831	1,566	17	3,298
Philippines	1,482	1,227	21	2,494
Japan	910	956	-5	2,125
China	139	275	-49	1,374
Korea	1,070	615	74	1,274
Taiwan	558	561	-0	921
Nigeria	225	132	70	920
Thailand	350	216	62	552
Colombia	244	158	55	522
Vietnam	294	199	47	313
Top 10 importers	**7,102**	**5,905**	**20**	**13,792**
Total U.S. wheat export sales	**11,012**	**8,621**	**28**	**18,323**
% of YTD current month's export projection	49%	45%		-
Change from prior week	246	745	-	-
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.

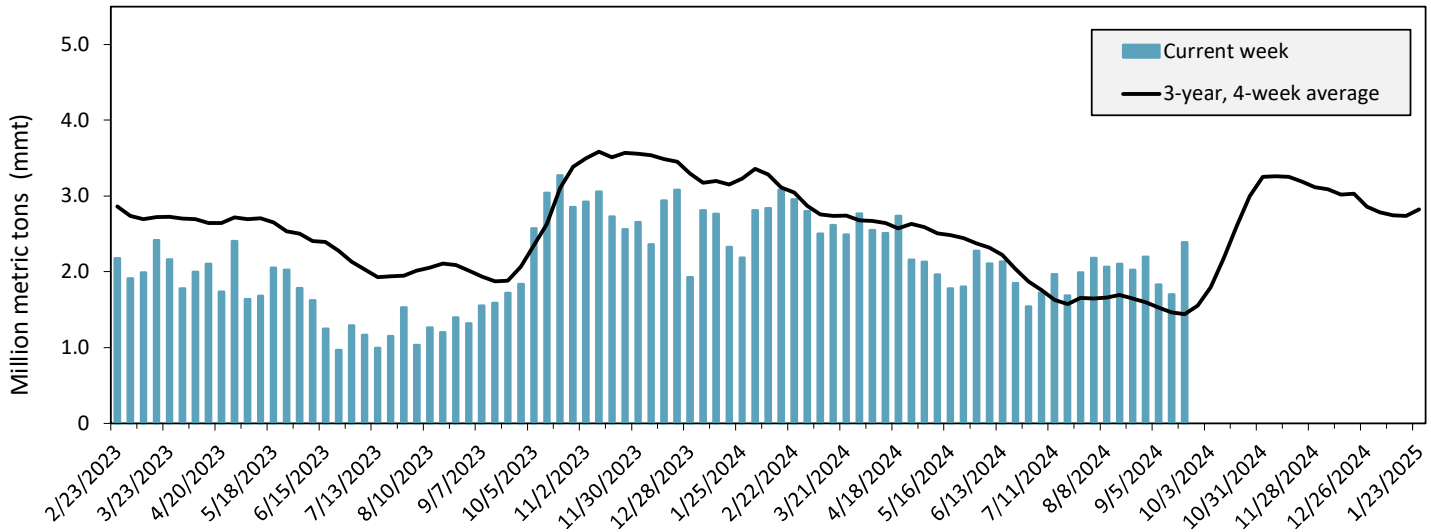
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 09/19/2024	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	6	62	10	11,711	3,983	294	n/a	468	5,267
	Soybeans	0	66	0	2,735	3,356	81	n/a	115	10,286
	Wheat	392	325	121	8,643	7,273	119	146	122	9,814
	All Grain	**399**	**453**	**88**	**24,175**	**14,807**	**163**	**174**	**129**	**25,913**
Mississippi Gulf	Corn	764	237	322	19,708	18,149	109	130	174	23,630
	Soybeans	410	295	139	14,214	15,462	92	97	124	26,878
	Wheat	168	88	191	3,797	2,663	143	181	161	3,335
	All Grain	**1,341**	**678**	**198**	**37,838**	**36,273**	**104**	**122**	**154**	**53,843**
Texas Gulf	Corn	9	16	60	406	237	172	625	107	397
	Soybeans	0	0	n/a	0	50	0	n/a	n/a	267
	Wheat	83	76	109	1,422	1,333	107	505	110	1,593
	All Grain	**170**	**98**	**174**	**4,578**	**3,800**	**120**	**154**	**114**	**5,971**
Interior	Corn	316	244	130	10,049	6,857	147	123	150	10,474
	Soybeans	75	111	68	5,066	3,849	132	165	155	6,508
	Wheat	47	69	69	2,275	1,799	126	139	115	2,281
	All Grain	**452**	**432**	**105**	**17,565**	**12,628**	**139**	**133**	**142**	**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	20	30	67	385	212	182	188	184	581
	All Grain	**20**	**30**	**67**	**403**	**296**	**136**	**113**	**120**	**831**
Atlantic	Corn	7	11	68	230	85	270	539	151	166
	Soybeans	0	1	0	441	1,196	37	12	10	2,058
	Wheat	1	0	n/a	66	91	72	22	19	101
	All Grain	**8**	**12**	**63**	**737**	**1,372**	**54**	**73**	**51**	**2,325**
All Regions	Corn	1,103	569	194	42,104	29,344	143	135	167	40,004
	Soybeans	485	473	103	22,528	24,079	94	114	127	46,459
	Wheat	711	589	121	16,588	13,373	124	162	125	17,738
	All Grain	**2,390**	**1,704**	**140**	**85,350**	**69,296**	**123**	**134**	**141**	**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.

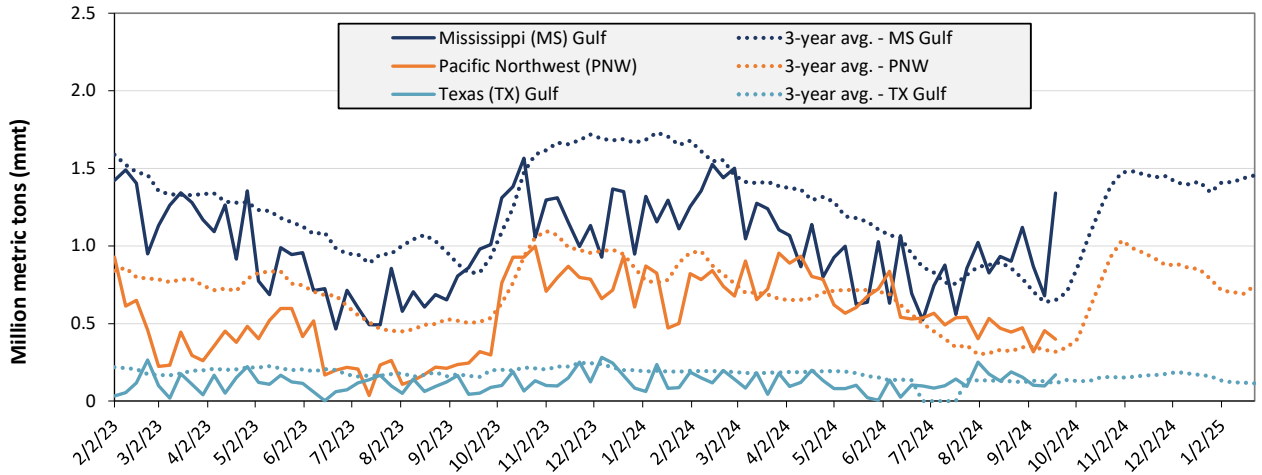
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Sep. 19: 2.4 mmt of grain inspected, up 40 percent from the previous week, up 48 percent from the same week last year, and up 66 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 09/19/24 inspections (mmt):
MS Gulf: 1.34
PNW: 0.4
TX Gulf: 0.17

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 98	up 74	up 95	down 12
Last year (same 7 days)	up 46	up 2112	up 63	up 8
3-year average (4-week moving average)	up 106	up 48	up 97	up 25

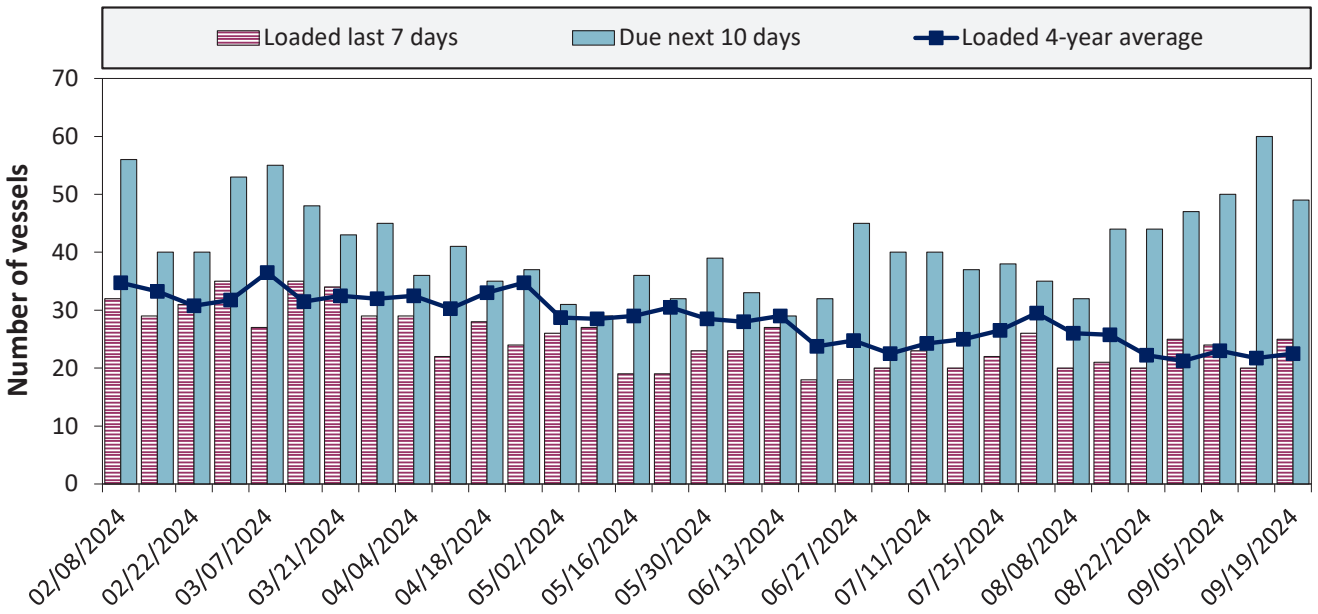
Source: USDA, Federal Grain Inspection Service.

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
9/19/2024	44	25	49	9
9/12/2024	31	20	60	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.

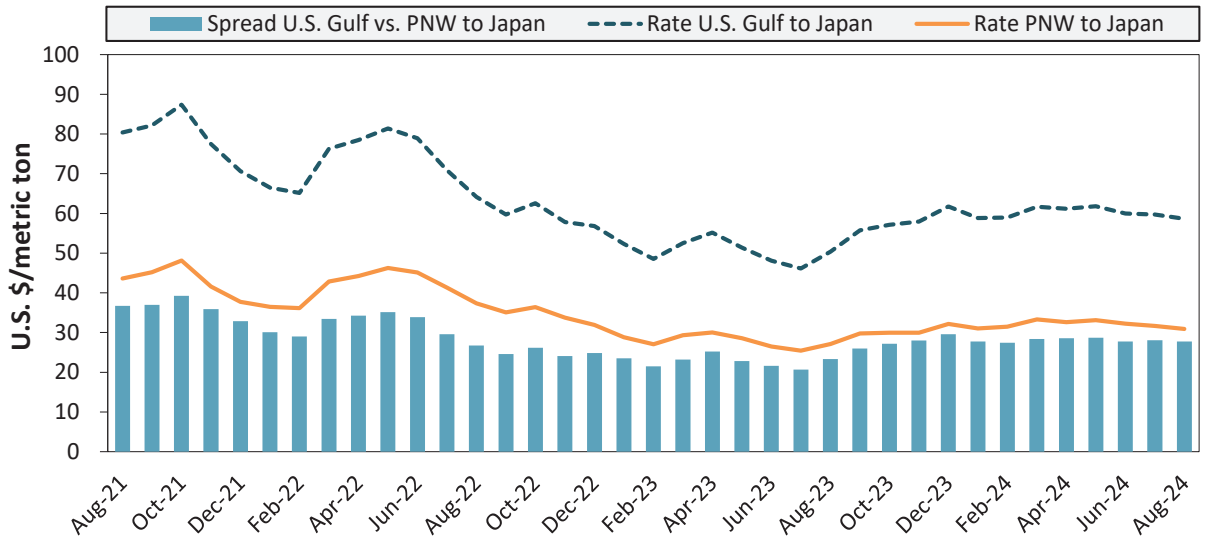
Figure 17. U.S . Gulf vessel loading activity



Week ending 9/19/24, number of vessels	Loaded	Due
Change from last year	-4%	9%
Change from 4-year average	11%	0%

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.

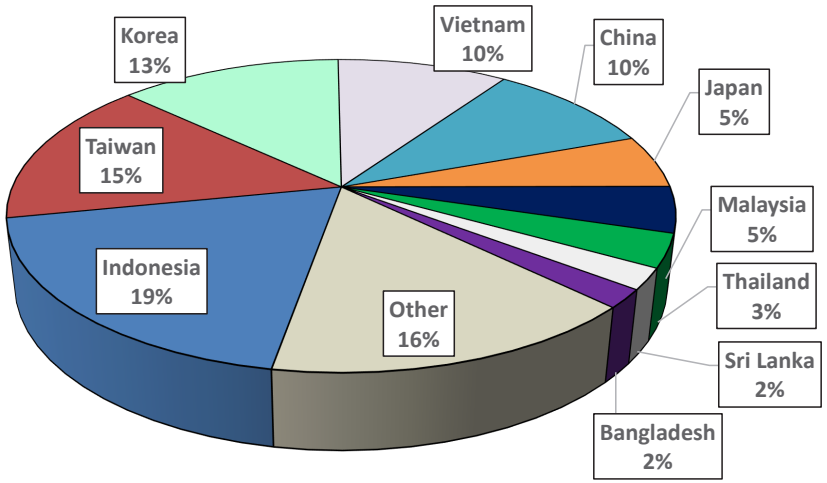
Table 18. Ocean freight rates for selected shipments, week ending 09/21/2024

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 19, 2024	Oct 1/10, 2024	66,000	56.85
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	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.

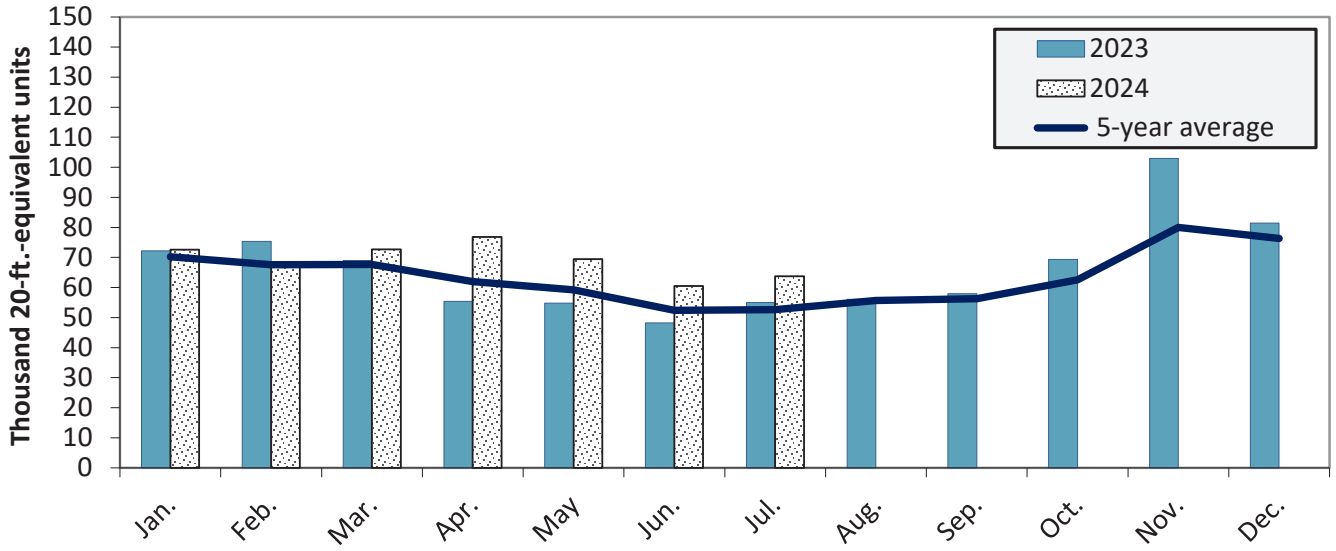
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined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