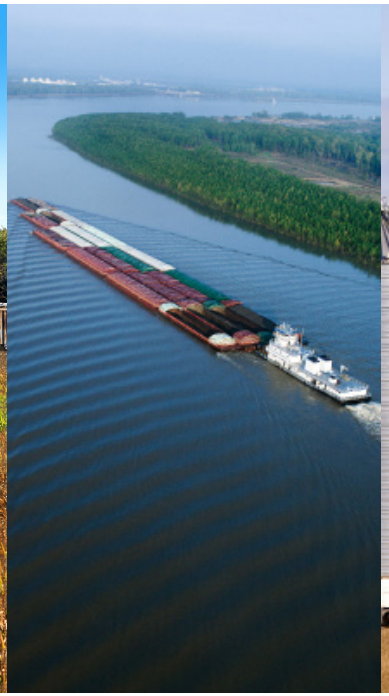
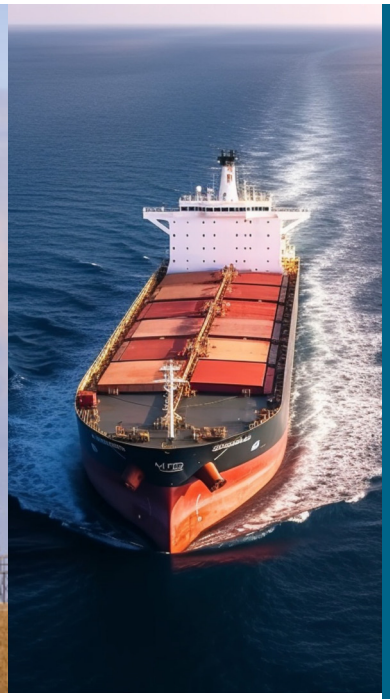
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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www.ams.usda.gov/GTR

USDA Issues Statement on Labor Disputes at East and Gulf Coast Ports. According to a statement released on October 1, USDA analysis shows the dockworkers strike at U.S. East and Gulf Coast ports is not expected to cause significant changes to food prices or availability in the near term for most items.

Further, the statement notes that non-containerized bulk export shipments, including grains, will be unaffected by the strike. The Department continues to monitor downstream impacts in the West and to work with industry to respond to potential impacts.

Rain Allows Rise in Tow and Draft Sizes on Lower Mississippi River. In the Lower Mississippi River and the Ohio River Valleys, recent precipitation—including from Hurricane Helene—has somewhat mitigated the low water levels in the Mississippi River System (MRS) (at least temporarily). The higher water levels have allowed for 11.5-foot draft sizes and full tow sizes from Cairo, IL, to the U.S. Gulf, though restrictions remain near St. Louis, MO.

On September 30, for the first time in 45 days, the river gauge at Memphis, TN, reached above zero, up from –10.3 feet on September 24. At Memphis, the Mississippi River is expected to crest at 6.2 feet this week before dropping to –2 feet in the next 2 weeks. Barge operators should be able to maintain full draft and tow sizes from Cairo to the Gulf for at least the next 2 weeks, as –5 feet is considered the low-water threshold.

The National Oceanic Atmospheric Administration is predicting below normal precipitation over the next month. Lack of additional rainfall may lead to restrictions on tow and drafts sizes being reinstituted.

Hurricane Helene Causes Significant Damage to Appalachian Rail Lines. Hurricane Helene, which made landfall in Florida on September 26, has impaired rail service in the Southeast for both CSX Transportation (CSX) and Norfolk Southern Railway (NS).

Most major routes are in service, and the railroads are working quickly to restore service to areas with downed trees and power lines—as well as areas without power. However, both railroads also experienced significant damage (e.g., damaged bridges) to lines in western North Carolina and eastern Tennessee. These lines will likely be out of service for the foreseeable future.

The impacts to grain transportation are likely to be modest because the most-impacted areas (e.g., Western North Carolina) produce minimal grain and because affected grain flows into the Southeast will be able to use other routes. According to *Trains*, CSX's track outage (between Erwin, TN, and Spruce Pine, NC) will impact about 5-7 trains daily that include "occasional unit ethanol trains terminating near Charlotte, NC… [and] infrequent grain trains." According to *World Grain*, North Carolina flour mills were minimally impacted by this week's flooding.

North Carolina, South Carolina, and Kentucky Temporarily Waive Trucking Restrictions. Responding to disruptions caused by Hurricane Helene, North Carolina, South Carolina, and Kentucky have temporarily waived certain trucking regulations for transporting newly harvested crops, fuels, and feed for livestock and poultry.

The North Carolina waiver (issued September 25) suspends certain size and weight restrictions for 30 days and suspends hours-of-service (HOS) regulations for 14 days. The Kentucky waiver (issued September 24) suspends HOS regulations for 14 days. The South Carolina waiver (issued September 25) suspends HOS regulations for 30 days and size and weight restrictions for 120 days.

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 19, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 32.47 million metric tons (mmt), up 7 percent from the same time last year and unchanged from last week.

Net **corn export sales** for MY 2024/25, were 0.54 mmt down 47 percent from last week. Net **soybean export sales** were 1.58 mmt, down 10 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.16 mmt, down 36 percent from last week.

Rail

U.S. Class I railroads originated 24,863 **grain carloads** during the week ending September 21. This was an 11-percent increase from the previous week, 14 percent more than last year, and 16 percent more than the 3-year average.

Average October **shuttle secondary railcar bids/offers** (per car) were $1,775 above tariff for the week ending September 26. This was $409 more than last week and $1,513 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $288 above tariff. This was $125 less than last week and $13 more than this week last year.

Barge

For the week ending September 28, **barged grain movements** totaled 398,808 tons. This was 21 percent less than the previous week and 6 percent more than the same period last year.

For the week ending September 28, 240 grain barges **moved down river**—72 fewer than last week. There were 846 grain barges **unloaded** in the New Orleans region, 19 percent more than last week.

Ocean

For the week ending September 26, 34 **oceangoing grain vessels** were loaded in the Gulf—62 percent more than the same period last year. Within the next 10 days (starting September 27), 48 vessels were expected to be loaded—2 percent more than the same period last year.

As of September 26, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $56.00, 1 percent more than the previous week. The rate from the Pacific Northwest to Japan was $30.50 per mt, unchanged from the previous week.

Fuel

For the week ending September 30, the U.S. average **diesel price** increased 0.5 cents from the previous week to $3.544 per gallon, 104.9 cents below the same week last year.

Grain Storage Availability More Limited This Harvest

Grain storage is an essential tool to efficiently market grain throughout the year. Abundant storage can also relieve strains on grain transportation and keep transportation costs down. By allowing shipments to be deferred until conditions improve, available storage can mitigate transportation bottlenecks, especially during harvest time. Last year, storage was abundant (at the national level) (***Grain Transportation Report (GTR), October 12, 2023***). However, since then, low grain prices have resulted in reduced farmer sales and higher on-farm stocks.

Compared to previous years, this harvest time will offer less abundant storage availability (nationally and in several States). Examining fall grain supplies and storage capacity nationwide, this article assesses storage and transportation availability during this year's grain harvest.

National View of Storage Availability: Smallest Storage Surplus in 5 Years

The difference between **grain storage capacity** and grain supplies indicates the degree to which the storage and handling system will face pressure this harvest. (Grain supplies are a combination of on- and off-farm **grain stocks** (as of September 1) and new (post-September 1) **grain production**.) The more positive the difference is, the greater the surplus of storage availability, and the more negative the difference is, the greater the storage deficit. Less storage surplus (or greater a deficit) means more pressure on the transportation system.

Stocks. According to USDA's National Agricultural Statistics Service (NASS), farmers and commercial grain facilities held 4.34 billion bushels (bbu) of grain in storage as of September 1, 2024—18 percent higher than last year, but about the same as the prior 5-year average.[1] Of total grain stocks on September 1, 1.69 bbu were held by farmers on farm—12 percent above average.

Production and Supplies. Adding to existing stocks, NASS projects U.S. farmers to harvest 20.07 bbu of corn, soybeans, and grain sorghum—1 percent higher than last year and 7 percent more than average.[2] If USDA's September projection is realized, it will be the largest fall harvest on record. Although corn production is projected down slightly from last year's record crop, it is offset by a record soybean crop—up 11 percent from average. From higher stocks and production, soybean supplies are 7 percent above average.

This fall's harvest is progressing quickly in most regions. According to the September 30 ***Crop Progress*** report, farmers have completed 21 percent of the corn harvest (3 percentage points ahead of average) and 26 percent of the soybean harvest (8 percentage points ahead of average).

Combined, total fall grain supplies—i.e., September 1 grain stocks, plus new production of corn, soybeans, and sorghum—are expected to be 24.41 bbu, which is 4 percent more than last year and 6 percent above average.

Storage Capacity. NASS publishes annual data on grain storage capacity for both on-farm (e.g., bins, cribs, and sheds) and off-farm facilities (e.g., elevators, mills, and crushers). As of December 1, 2023, grain storage capacity across the Nation totaled 25.47 bbu, up slightly from the same date of the previous year. That total comprised 11.88 bbu of off-farm storage capacity and 13.59 bbu of on-farm storage capacity.

Storage Availability. Comparing fall grain supplies to total storage capacity suggests a storage surplus of 1.06 bbu across the United States, which is 1.04 bbu *lower* than average and the smallest surplus at the national level since 2018. High grain supplies relative to storage suggest grain transportation demand could be above average in coming months.

Comparing on-farm supplies (i.e., total production and on-farm grain stocks) to

1 In this calculation, "grain" includes barley; (old crop) corn; oats; (old crop) sorghum; (old crop) soybeans; and wheat. Throughout the article, unless otherwise specified, "average" refers to the prior 5-year average.

2 These numbers come from NASS's September *Crop Production* report. NASS's October *Crop Production* report will be released on October 11.

on-farm storage capacity shows a storage deficit of 8.17 bbu—21 percent higher than average. The lack of on-farm storage availability will raise demand for trucks immediately after harvest—to move grain from farm to elevator.

State-Level View of Storage Availability

The projected fall grain harvest (20.07 bbu) is 1.28 bbu above average. Of this 1.28-bbu increase, 56 percent comes from just three States: Illinois, Iowa, and South Dakota.

For insights across U.S. geography and across time, figure 1 shows two snapshots of storage availability by State: the estimated surplus (or deficit) for 2024 and 2024 compared to the 5-year average.

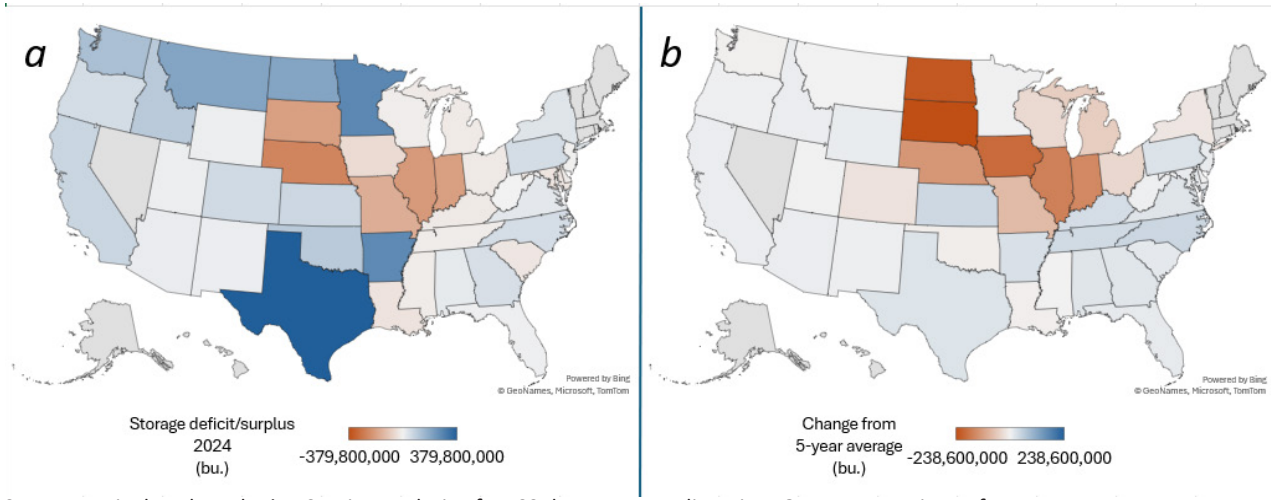
The 2024 distribution of estimated surpluses and deficits (map *a* in fig. 1) reveals significant variation from State to State. In total, 17 States are projected to have storage deficits, and 21 States are projected to have surpluses.

Five States are projected to have deficits above 100 million bushels (mbu), and eight States are projected to have surpluses above 100 million bushels.

Storage is most short in Nebraska (–253 mbu); Illinois (–205 mbu); South Dakota (–192 mbu); Indiana (–192 mbu); and Missouri (–159 mbu).

Storage Concern for Eastern Cornbelt (Barge). As figure 1's map *b* shows, the Cornbelt States are more storage-constrained than average—owing to high anticipated production.

Figure 1.(a) Storage surplus/deficit for 2024 and (b) 2024 compared to the 5-year average (in bushels)



Source: Agricultural Marketing Service analysis of NASS data. Map credits: Bing, GeoNames, Microsoft, TomTom.

In particular, river States in the Eastern Cornbelt, such as Illinois, Indiana, Iowa, Missouri, and Ohio show some of the largest drops in storage availability: relative to average, Iowa's estimated storage availability is down 197 mbu; Illinois, down 165 mbu; Indiana, down 154 mbu; Missouri, down 81 mbu; and Ohio, down 38 mbu (map *b* in fig. 1).

In these five States—compounding the decision to transport now versus later—soybean supplies are 1.90 bbu above average. On average, nearly 60 percent of soybean exports from South Louisiana occur between October and January because of competition from Brazil at other times of the year (GTR fig. 16). If low water levels in the Mississippi River System limit shipments, shippers in these States may switch to rail to move soybeans to export terminals, as they did in October 2022 (GTR, May 2, 2024).

Storage Concern for Western Cornbelt (Rail). Similarly, this harvest, the more rail-dependent States of South Dakota, North Dakota, and Nebraska have less storage than average—with declines of 239 mbu, 225 mbu, and 124 mbu, respectively (though North Dakota still has a surplus).

Contributing to this shortage, soybean supplies are up over 200 mbu in each State, which will add more pressure to ship quickly. However, shipping those oilseeds will be more expensive, as October values in the secondary market average $1,775—the highest October shuttle freight values since severe rail service disruptions in 2022 (GTR fig. 5). One reason for these high secondary market values is that BNSF Railway (BNSF) reduced its shuttle train offerings this year from 155 to 140 (GTR, June 13, 2024, second highlight).

Low Supplies in Drought-Impacted Southeast (Rail). States in the Southeast will harvest less grain this year because of drought—resulting in additional storage space for imported grain. North Carolina's drought-stunted grain harvest, for example, is projected to be 132 mbu—25 percent below average. As a result, the State will have an estimated 53 mbu of excess storage capacity (43 mbu higher than average). North Carolina livestock and poultry producers will likely import grain from storage-constrained Cornbelt States (e.g., Indiana and Illinois), increasing grain transportation demand for CSX Transportation and Norfolk Southern Railway (GTR fig. 3).

Transportation Outlook

Rail. According to service metrics from the Surface Transportation Board (STB), rail grain carloads, which typically decline over the summer, have remained strong since mid-July, buoyed by seasonally high grain exports via the Pacific Northwest and Interior (to Mexico) (GTR fig. 3 and table 16). Regarding service, speeds for grain trains have trended down, decreasing 4 percent from mid-July to late September (GTR table 4a).

Inadequate rail service for grain exports to Mexico was STB's top concern at this year's National Grain Car Council meeting (GTR, September 5, 2024)—specifically, the temporary permit embargoes by BNSF and Union Pacific Railroad (UP) on grain shuttle trains (GTR, September 19, 2024, first highlight). However, both railroads have since resumed issuing permits (BNSF on October 1 and UP on October 2) for grain shuttle trains to Mexico subject to existing FXE permit embargoes at the Eagle Pass, TX and El Paso, TX border crossings.

According to data from USDA's Federal Grain Inspection Service, grain exports to Mexico by rail have been above average throughout 2024. However, they dropped significantly from 0.40 million metric tons (mmt) per week (from August 8 through September 19) to 0.25 mmt for the week ending September 26. (Please note that recent inspections data can be revised.)

Some States with low projected storage availability export large corn and soybean shipments by rail to Mexico. Regarding 2019-23 rail shipments to Mexico, Illinois was first for corn; Iowa, third for corn; Missouri, fifth for corn and second for soybeans; and Nebraska, fourth for corn and first for soybeans.

Barge. Because of low water restrictions implemented in mid-August, barge spot rates at Memphis, TN, were 51 percent higher than average (GTR table 9). After 45 days of restrictions, recent precipitation has allowed barge navigation to return to normal along the Lower Mississippi River for at least the next few weeks, and barge spot rates have dropped below average. However, restrictions may need to be implemented again, if precipitation is inconsistent (see second GTR highlight).

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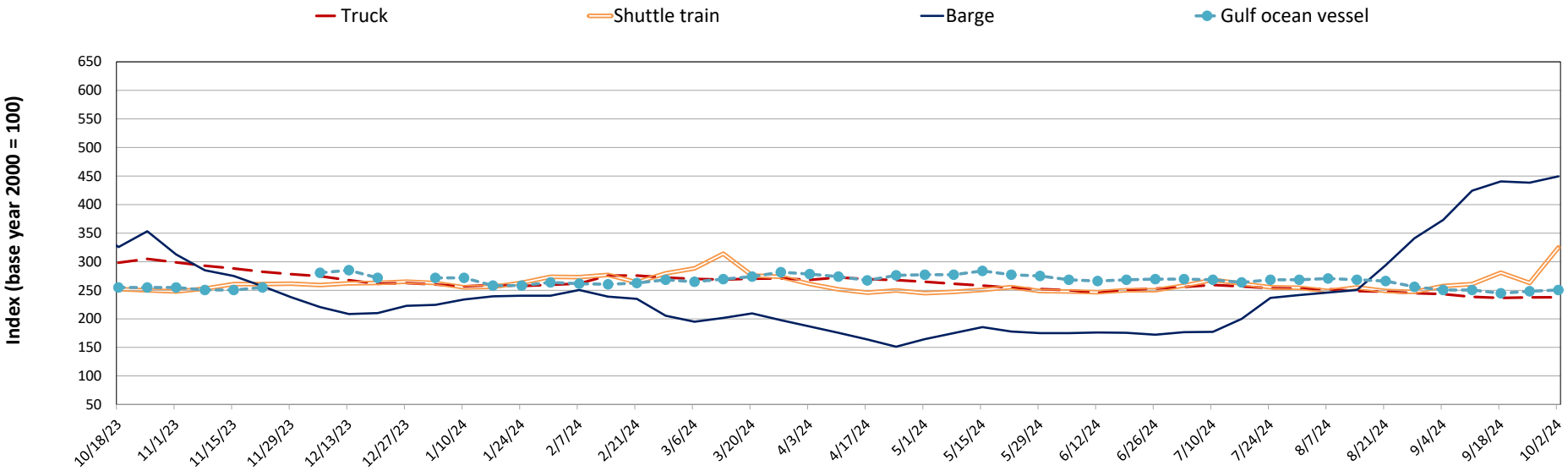
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
10/02/24	238	339	325	449	250	216
09/25/24	238	351	263	438	248	216
10/04/23	308	343	270	549	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.

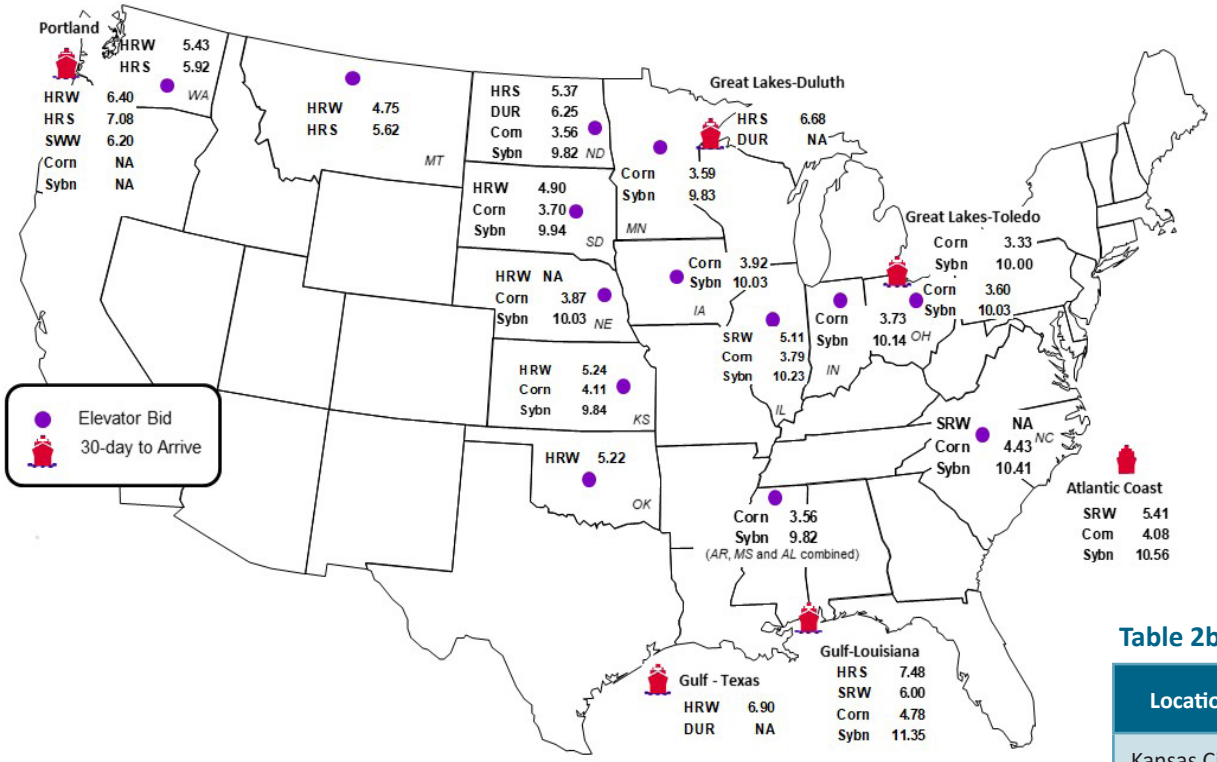
Figure 1. Grain transportation cost indicators as of week ending 10/2/24



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	9/27/2024	9/20/2024
Corn	IL–Gulf	-0.99	-1.05
Corn	NE–Gulf	-0.91	-0.98
Soybean	IA–Gulf	-1.32	-1.25
HRW	KS–Gulf	-1.66	-1.79
HRS	ND–Portland	-1.71	-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	9/27/2024	Week ago 9/20/2024	Year ago 9/29/2023
Kansas City	Wheat	Dec	5.810	5.780	6.694
Minneapolis	Wheat	Dec	6.082	6.080	7.092
Chicago	Wheat	Dec	5.846	5.824	5.484
Chicago	Corn	Dec	4.170	4.112	4.792
Chicago	Soybean	Nov	10.594	10.380	12.700

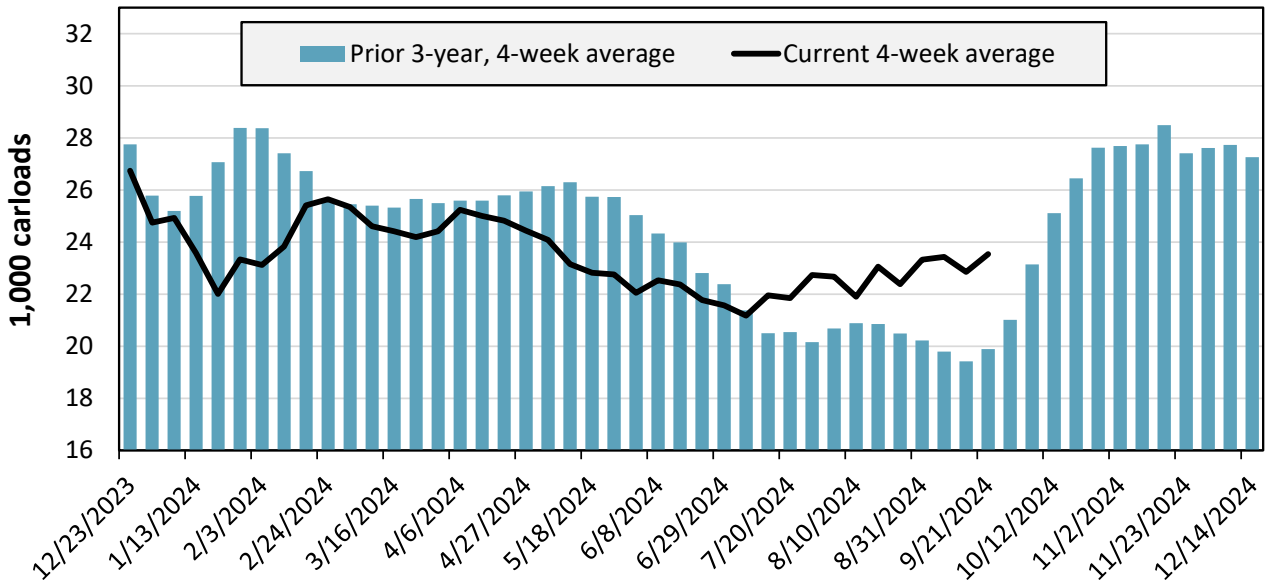
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 9/21/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,887	2,374	11,908	4,728	2,539	1,427	24,863
This week last year	1,395	1,407	10,290	4,980	2,639	1,101	21,812
2024 YTD	62,596	101,277	395,258	193,434	100,815	35,810	889,190
2023 YTD	64,466	94,753	329,712	193,931	86,978	46,831	816,671
2024 YTD as % of 2023 YTD	97	107	120	100	116	76	109
Last 4 weeks as % of 2023	126	175	123	115	94	125	121
Last 4 weeks as % of 3-yr. avg.	130	160	122	101	98	148	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 21, grain carloads were up 3 percent from the previous week, up 21 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: 9/21/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	35.6	32.9	8.9	14.1	6.3	19.1	51.5	24.1
	Average over last 4 weeks	27.8	27.2	13.1	20.4	9.6	11.8	36.1	20.8
	Average of same 4 weeks last year	42.4	49.0	6.7	12.8	7.7	32.6	16.2	23.9
Grain unit train speeds (miles per hour)	This week	22.6	19.6	25.0	22.2	22.8	20.6	22.8	22.2
	Average over last 4 weeks	23.5	19.6	24.5	22.3	23.7	20.1	22.4	22.3
	Average of same 4 weeks last year	25.0	16.2	25.4	23.7	24.3	18.4	24.2	22.4

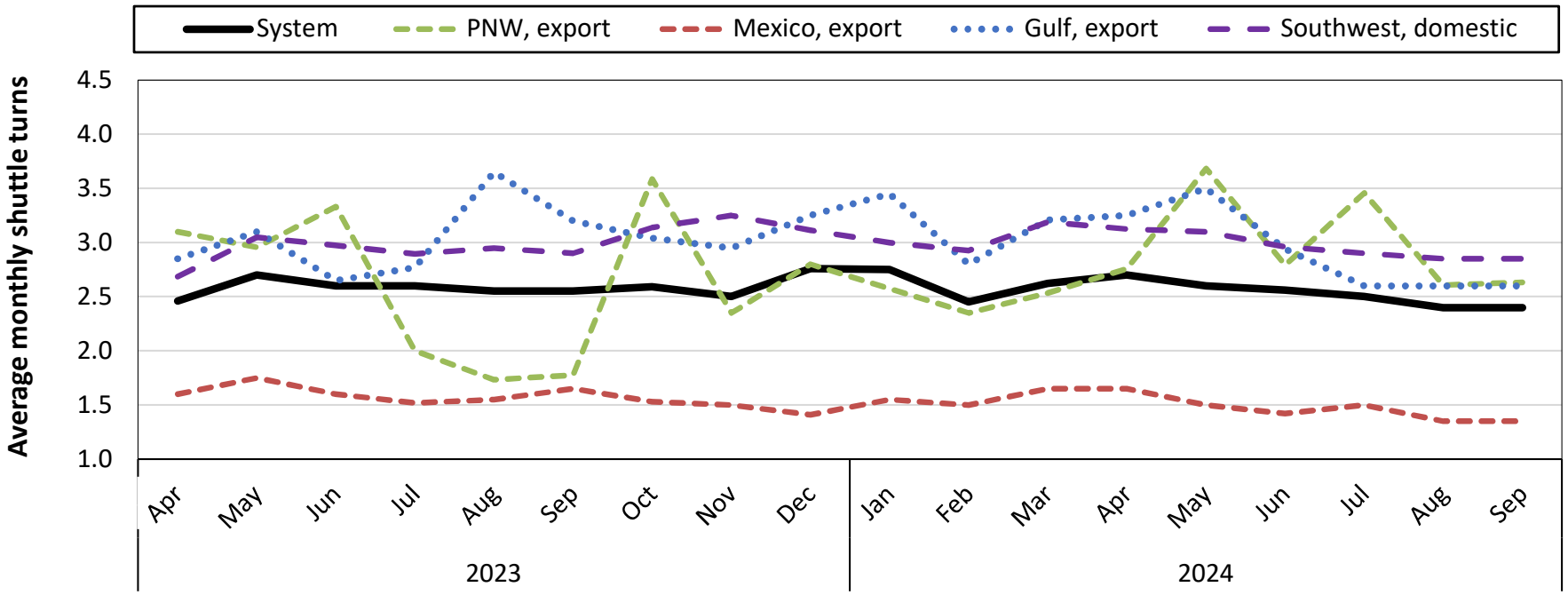
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

Table 4b. Rail service metrics—unfilled grain car orders and delays

For the week ending: 9/21/2024		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	49	8	426	105	4	67	71	729
	Average over last 4 weeks	35	9	461	100	4	72	76	756
	Average of same 4 weeks last year	19	16	448	68	3	113	28	695
Loaded grain cars not moved in over 48 hours (number)	This week	91	115	406	255	2	84	89	1,042
	Average over last 4 weeks	41	143	463	188	2	101	71	1,009
	Average of same 4 weeks last year	12	219	293	100	4	194	18	839
Grain unit trains held (number)	This week	0	0	8	11	0	7	4	30
	Average over last 4 weeks	0	0	10	11	0	4	3	28
	Average of same 4 weeks last year	0	3	5	6	0	6	7	27
Unfilled grain car orders (number)	This week	1	0	527	618	0	542	440	2,128
	Average over last 4 weeks	1	1	919	584	0	293	185	1,983
	Average of same 4 weeks last year	0	17	422	156	0	453	14	1,061

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

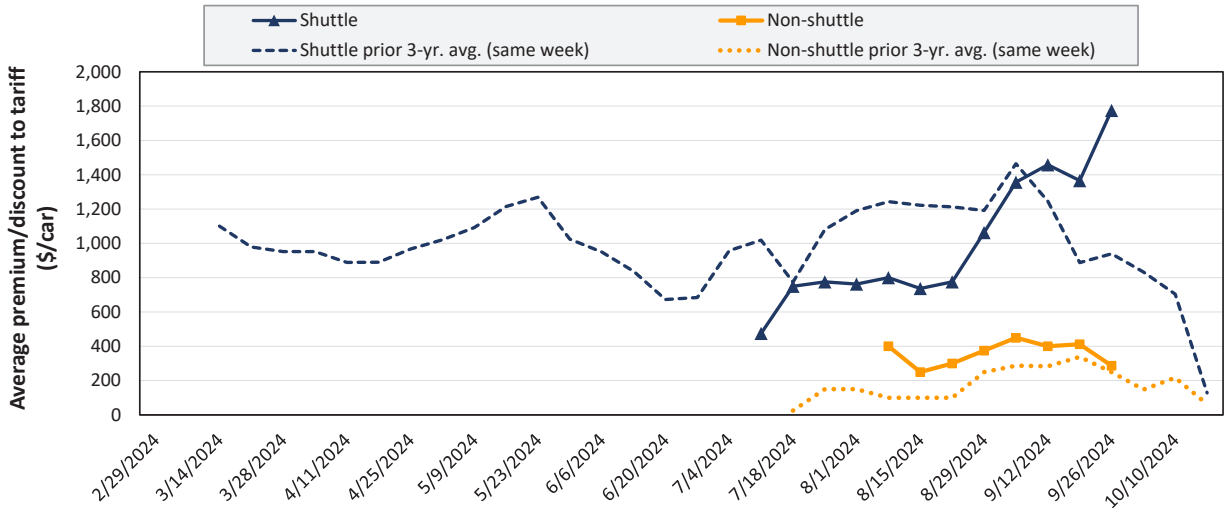


Average monthly system-wide grain shuttle turns reported in the first week of September 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.63 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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 October 2024



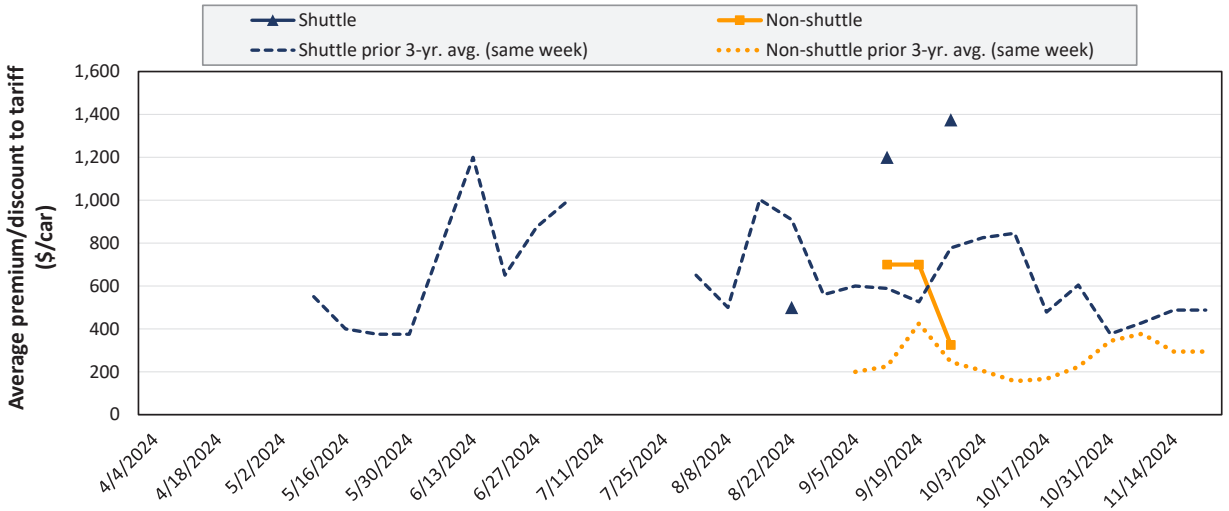
Average non-shuttle bids/offers fell $125 this week, and are $163 below the peak.

Average shuttle bids/offers rose $409 this week and are at the peak.

9/26/2024	BNSF	UP
Non-Shuttle	$375	$200
Shuttle	$1,550	$2,000

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 November 2024



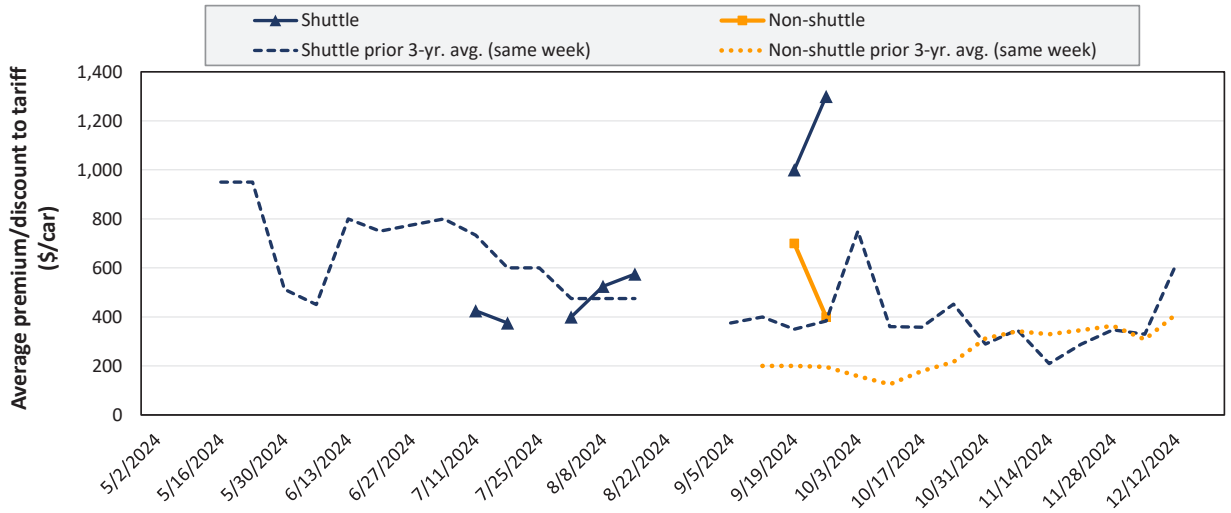
Average non-shuttle bids/offers fell $375 this week, and are $375 below the peak.

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

9/26/2024	BNSF	UP
Non-Shuttle	$400	$250
Shuttle	$1,500	$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 December 2024



Average non-shuttle bids/offers fell $300 this week, and are $300 below the peak.

Average shuttle bids/offers rose $300 this week and are at the peak.

9/26/2024	BNSF	UP
Non-Shuttle	$400	n/a
Shuttle	$1,300	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: 9/26/2024		Delivery period					
		Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25
Non-shuttle	BNSF	375	400	400	n/a	n/a	n/a
	Change from last week	-225	-300	-300	n/a	n/a	n/a
	Change from same week 2023	-25	0	n/a	n/a	n/a	n/a
	UP	200	250	n/a	n/a	n/a	n/a
	Change from last week	-25	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	50	100	n/a	n/a	n/a	n/a
Shuttle	BNSF	1,550	1,500	1,300	n/a	n/a	n/a
	Change from last week	69	n/a	300	n/a	n/a	n/a
	Change from same week 2023	1,275	n/a	1,100	n/a	n/a	n/a
	UP	2,000	1,250	n/a	n/a	n/a	n/a
	Change from last week	750	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	1,750	n/a	n/a	n/a	n/a	n/a
	CPKC	1,250	350	n/a	n/a	n/a	n/a
	Change from last week	550	0	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	-50	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, October 2024

Commodity	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Wichita, KS	St. Louis, MO	$4,991	$167	$51.22	$1.39	19
	Grand Forks, ND	Duluth-Superior, MN	$3,862	$36	$38.71	$1.05	-5
	Wichita, KS	Los Angeles, CA	$7,020	$184	$71.54	$1.95	-7
	Wichita, KS	New Orleans, LA	$4,425	$294	$46.86	$1.28	-10
	Sioux Falls, SD	Galveston-Houston, TX	$6,966	$151	$70.67	$1.92	-5
	Colby, KS	Galveston-Houston, TX	$4,675	$322	$49.62	$1.35	-10
	Amarillo, TX	Los Angeles, CA	$5,585	$448	$59.91	$1.63	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$5,385	$332	$56.77	$1.44	3
	Toledo, OH	Raleigh, NC	$8,877	$0	$88.15	$2.24	0
	Des Moines, IA	Davenport, IA	$3,619	$70	$36.64	$0.93	26
	Indianapolis, IN	Atlanta, GA	$6,866	$0	$68.18	$1.73	0
	Indianapolis, IN	Knoxville, TN	$5,790	$0	$57.50	$1.46	0
	Des Moines, IA	Little Rock, AR	$4,705	$207	$48.77	$1.24	4
	Des Moines, IA	Los Angeles, CA	$6,585	$602	$71.37	$1.81	1
Soybeans	Minneapolis, MN	New Orleans, LA	$3,656	$472	$41.00	$1.12	-3
	Toledo, OH	Huntsville, AL	$7,269	$0	$72.18	$1.96	0
	Indianapolis, IN	Raleigh, NC	$8,169	$0	$81.12	$2.21	0
	Indianapolis, IN	Huntsville, AL	$5,921	$0	$58.80	$1.60	0
	Champaign-Urbana, IL	New Orleans, LA	$5,320	$332	$56.13	$1.53	3

Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge

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

Table 7. Tariff rail rates for shuttle train shipments, October 2024

Commodity	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Great Falls, MT	Portland, OR	$4,343	$106	$44.18	$1.20	-7
	Wichita, KS	Galveston-Houston, TX	$4,411	$82	$44.62	$1.21	-7
	Chicago, IL	Albany, NY	$7,413	$0	$73.61	$2.00	0
	Grand Forks, ND	Portland, OR	$6,001	$182	$61.40	$1.67	-7
	Grand Forks, ND	Galveston-Houston, TX	$5,446	$187	$55.94	$1.52	-6
	Colby, KS	Portland, OR	$5,923	$528	$64.06	$1.74	-3
Corn	Minneapolis, MN	Portland, OR	$5,510	$222	$56.92	$1.45	-7
	Sioux Falls, SD	Tacoma, WA	$5,470	$203	$56.34	$1.43	-7
	Champaign-Urbana, IL	New Orleans, LA	$4,625	$332	$49.23	$1.25	3
	Lincoln, NE	Galveston-Houston, TX	$4,860	$119	$49.44	$1.26	3
	Des Moines, IA	Amarillo, TX	$5,125	$260	$53.47	$1.36	3
	Minneapolis, MN	Tacoma, WA	$5,510	$220	$56.90	$1.45	-7
	Council Bluffs, IA	Stockton, CA	$6,080	$228	$62.64	$1.59	-0
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,185	$203	$63.44	$1.73	-9
	Minneapolis, MN	Portland, OR	$6,235	$222	$64.12	$1.75	-9
	Fargo, ND	Tacoma, WA	$6,085	$181	$62.22	$1.69	-9
	Council Bluffs, IA	New Orleans, LA	$5,550	$383	$58.92	$1.60	2
	Toledo, OH	Huntsville, AL	$5,509	$0	$54.71	$1.49	0
	Grand Island, NE	Portland, OR	$6,185	$540	$66.78	$1.82	1

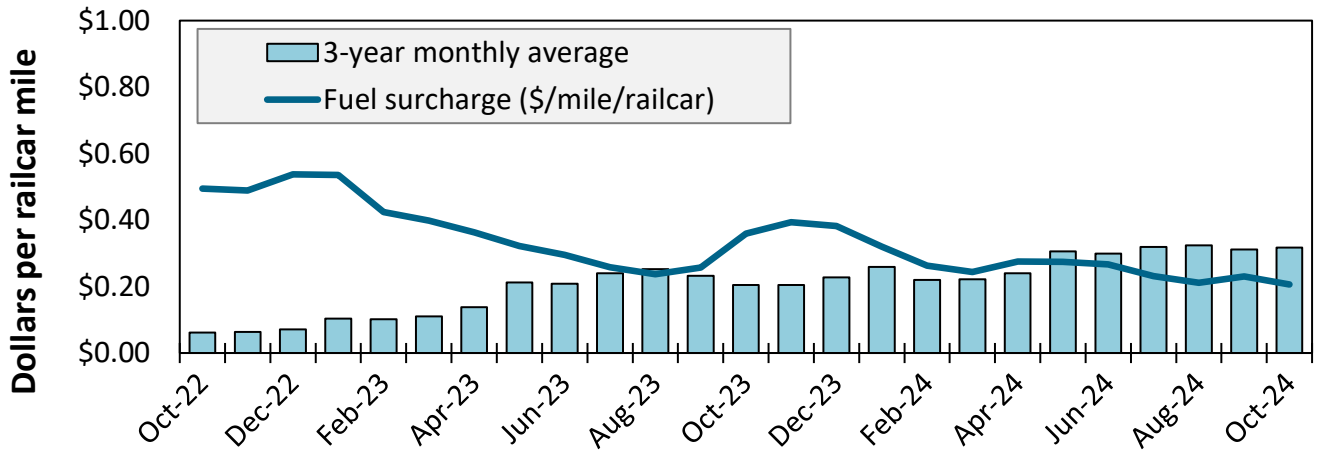
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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, October 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	$4,714	$46.40	$1.18	5.9	1.8
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,590	$55.02	$1.40	1.5	-1.7
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	$6,119	$60.22	$1.53	1.4	-1.9
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,496	$54.09	$1.37	1.6	-1.5
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,711	$56.21	$1.43	1.5	-1.7
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,728	$46.53	$1.18	-	-
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,121	$50.40	$1.28	5.6	2.6
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,590	$55.02	$1.50	1.5	-1.7
Soybeans	Brunswick, MO	Eagle Pass, TX	BNSF	Shuttle	$5,462	$53.76	$1.46	-	-
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$5,456	$53.70	$1.46	-0.6	-3.3
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,651	$65.46	$1.78	-0.4	1.9
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$5,457	$53.71	$1.46	-0.6	-3.3
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,496	$54.09	$1.47	1.6	-1.5
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,755	$66.48	$1.81	-0.4	1.7
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$4,017	$39.54	$1.08	-0.9	-12.6
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$3,599	$35.42	$0.96	-1.0	-13.5
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,609	$45.36	$1.23	-0.4	-10.1
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,496	$54.09	$1.47	1.6	-1.5
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,495	$44.24	$1.20	-0.4	-10.1

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).

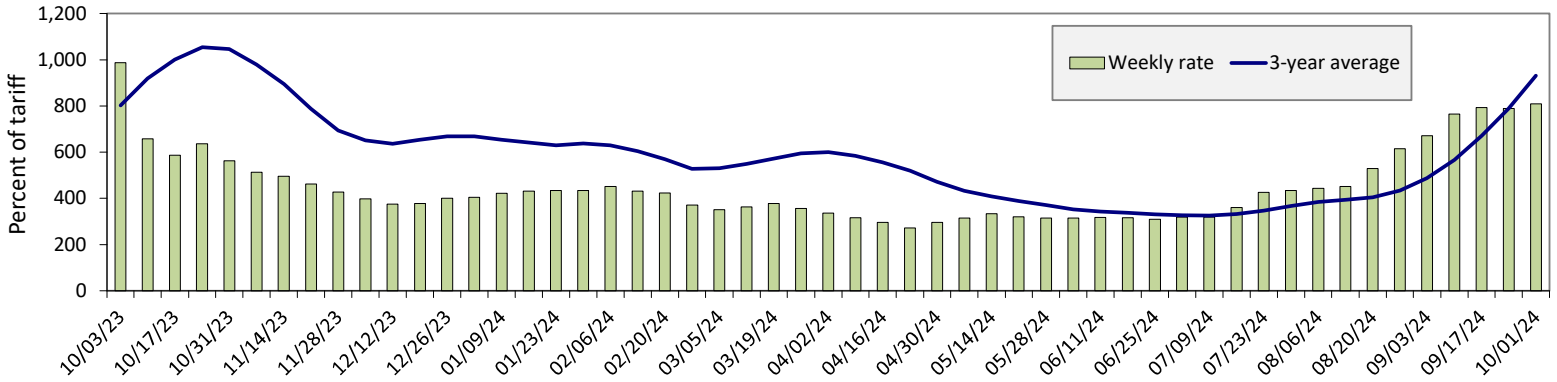
Figure 8. Railroad fuel surcharges, North American weighted average



October 2024: $0.21/mile, down 2 cents from last month’s surcharge of $0.23/mile; down 15 cents from the October 2023 surcharge of $0.36/mile; and down 11 cents from the October prior 3-year average of $0.32/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 9. Illinois River barge freight rate



For the week ending October 1: 3 percent higher than the previous week; 18 percent lower than last year; and 13 percent lower 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	10/1/2024	790	834	809	750	811	811	696
	9/24/2024	734	775	789	736	797	797	725
$/ton	10/1/2024	48.90	44.37	37.54	29.93	38.04	32.76	21.85
	9/24/2024	45.43	41.23	36.61	29.37	37.38	32.20	22.77
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	-8	-16	-18	-22	-20	-20	-36
	3-year avg.	-11	-12	-13	-25	-19	-19	-37
Rate	November	623	604	599	489	583	583	456
	January	n/a	n/a	495	402	407	407	355

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.

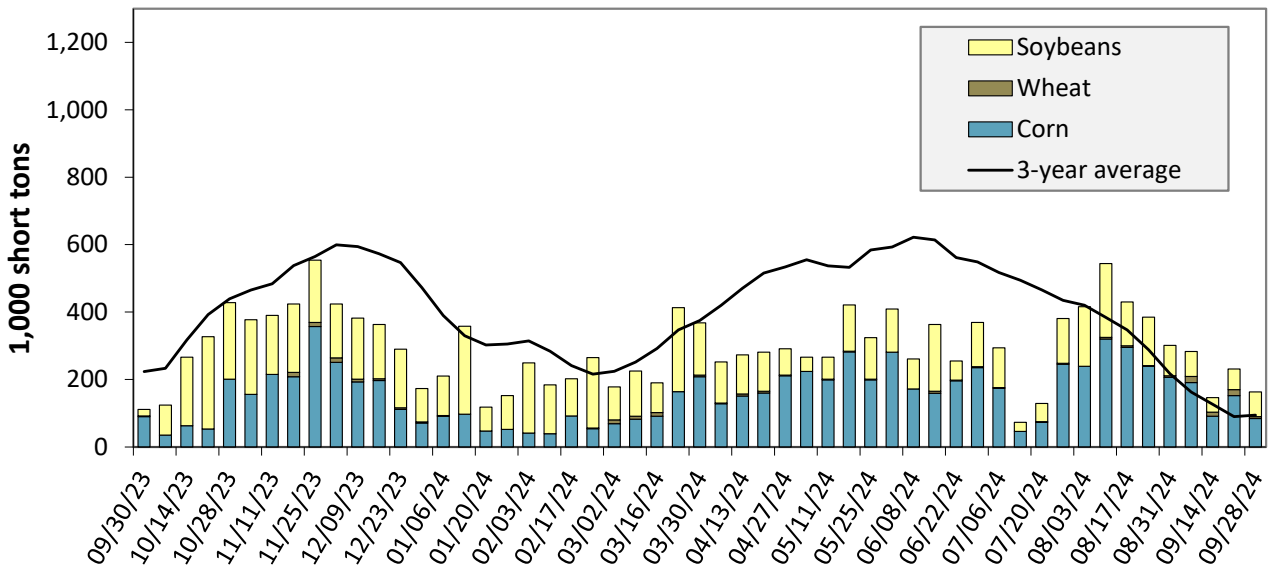
Figure 10. Benchmark tariff rates

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 28: 47 percent higher than last year and 73 percent higher than the 3-year average.

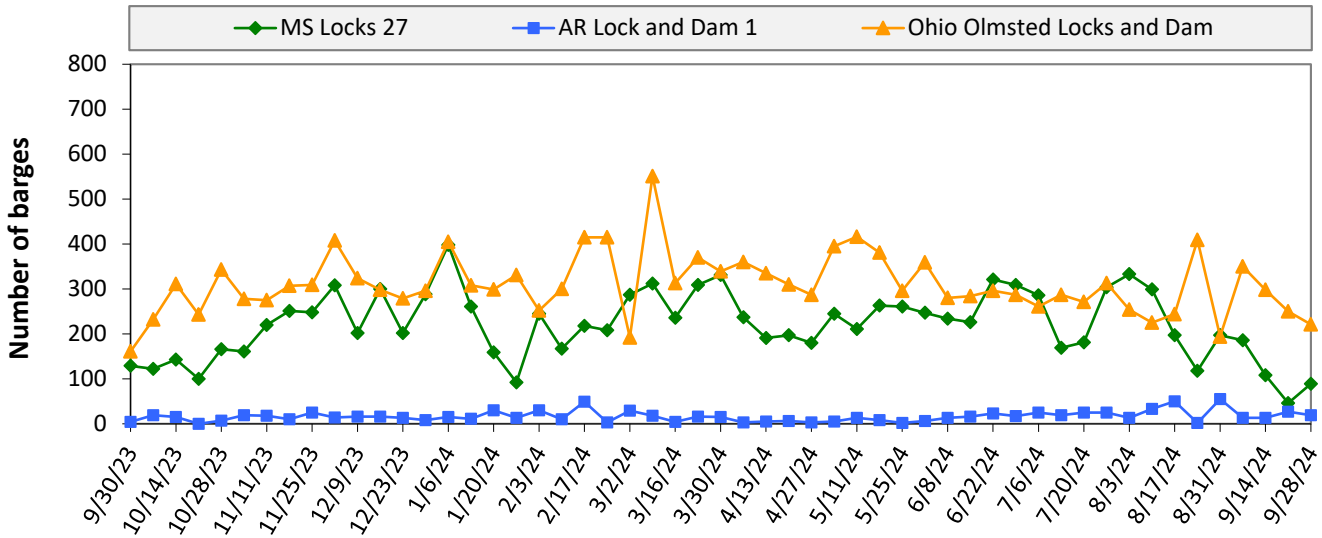
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 09/28/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	14	0	13	0	27
Mississippi River (Winfield, MO (L25))	43	6	56	0	105
Mississippi River (Alton, IL (L26))	89	6	84	2	180
Mississippi River (Granite City, IL (L27))	84	6	73	2	165
Illinois River (La Grange)	18	0	13	2	32
Ohio River (Olmsted)	127	5	69	0	201
Arkansas River (L1)	0	16	17	0	33
Weekly total - 2024	211	28	159	2	399
Weekly total - 2023	210	22	145	0	377
2024 YTD	11,059	1,366	7,496	171	20,092
2023 YTD	9,144	1,140	7,575	202	18,061
2024 as % of 2023 YTD	121	120	99	85	111
Last 4 weeks as % of 2023	280	132	126	83	190
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.

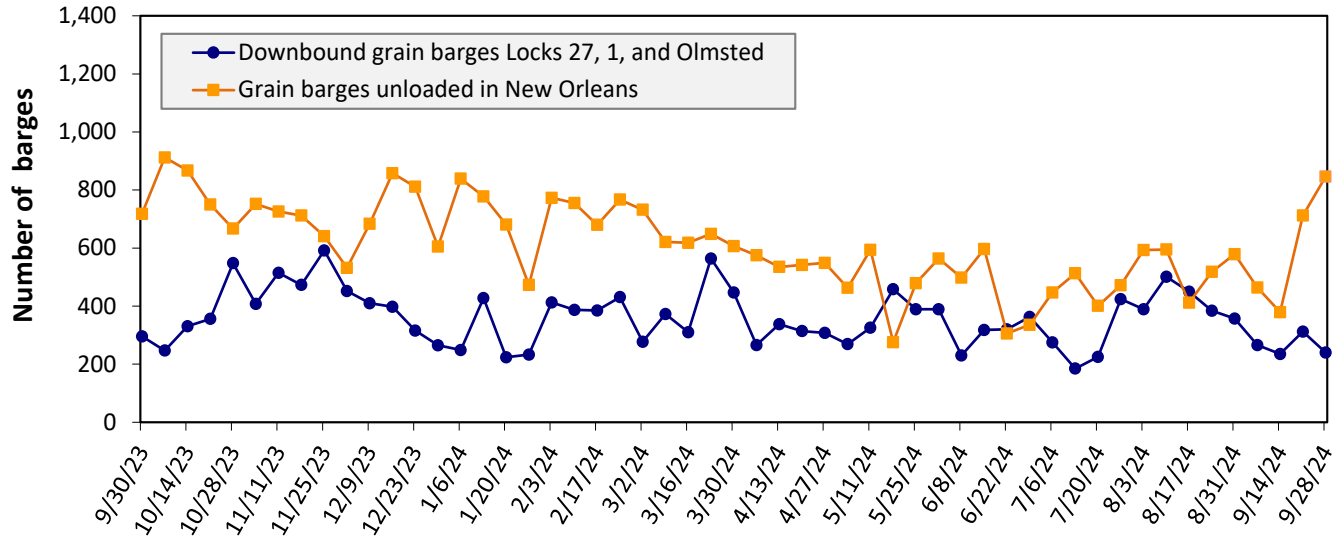
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 28: 329 barges transited the locks, 6 barges more than the previous week, and 9 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 28: 240 barges moved down river, 72 fewer than the previous week; 846 grain barges unloaded in the New Orleans Region, 19 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.

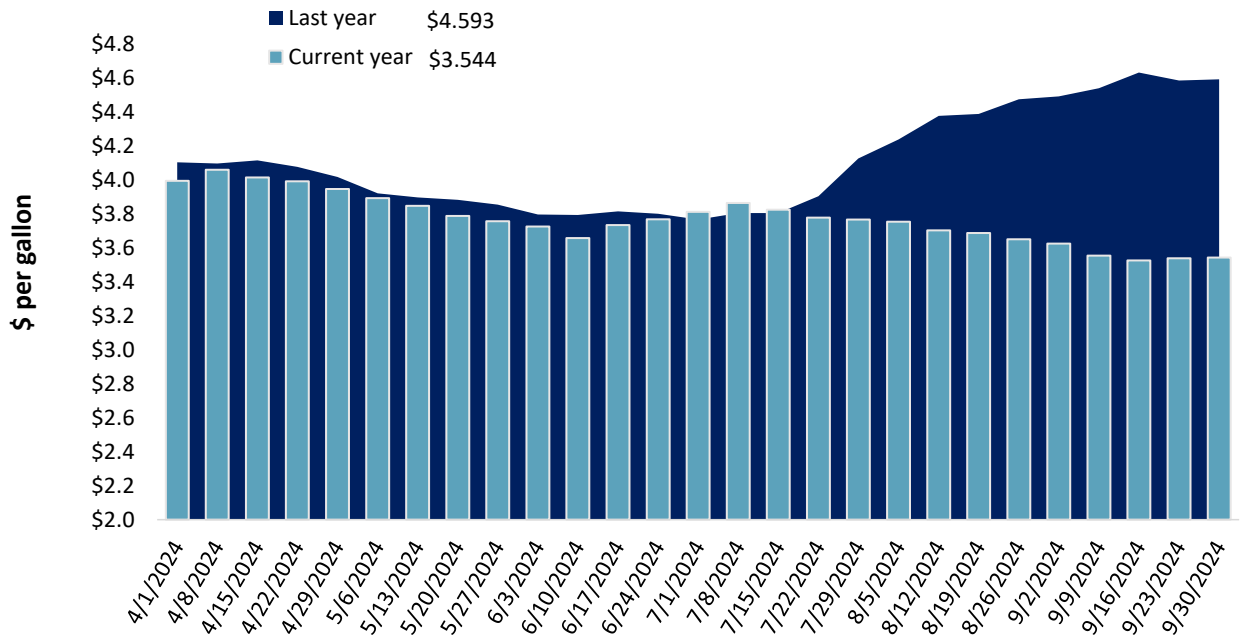
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 9/30/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.571	-0.006	-0.971
	New England	3.788	-0.009	-0.819
	Central Atlantic	3.802	-0.011	-0.957
	Lower Atlantic	3.463	-0.004	-0.992
II	Midwest	3.520	0.009	-0.929
III	Gulf Coast	3.212	0.021	-1.067
IV	Rocky Mountain	3.612	0.004	-1.166
V	West Coast	4.226	-0.013	-1.468
	West Coast less California	3.797	-0.018	-1.393
	California	4.719	-0.008	-1.550
Total	United States	3.544	0.005	-1.049

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 30, the U.S. average diesel fuel price increased 0.5 cents from the previous week to $3.544 per gallon, 104.9 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 9/19/2024	845	560	1,250	958	65	3,677	12,508	16,289	32,474
	This week year ago	619	684	1,294	887	209	3,693	10,510	16,255	30,458
	Last 4 wks. as % of same period 2023/24	164	96	112	127	27	117	96	71	85
Current shipped (cumulative) exports sales	2024/25 YTD	1,791	1,251	2,466	1,846	141	7,495	2,236	1,279	11,009
	2023/24 YTD	1,009	1,336	1,966	1,109	52	5,472	2,059	1,389	8,920
	YTD 2024/25 as % of 2023/24	177	94	125	166	0	137	109	92	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 9/19/2024	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	7,175	6,372	13	17,746
Japan	1,656	1,492	11	9,366
China	6	639	-99	8,233
Colombia	1,018	694	47	4,383
Korea	152	9	1630	1,565
Top 5 importers	**10,008**	**9,206**	**9**	**41,293**
Total U.S. corn export sales	14,744	12,569	17	51,170
% of YTD current month's export projection	25%	22%	-	-
Change from prior week	535	842	-	-
Top 5 importers' share of U.S. corn export sales	**68%**	**73%**	**-**	**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 9/19/2024	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	6,812	7,458	-9	28,636
Mexico	1,395	1,833	-24	4,917
Japan	524	646	-19	2,231
Egypt	440	130	239	2,228
Indonesia	488	333	46	1,910
Top 5 importers	**9,658**	**10,400**	**-7**	**39,922**
Total U.S. soybean export sales	**17,567**	**17,644**	**-0**	**51,302**
% of YTD current month's export projection	35%	38%	-	-
Change from prior week	1,575	621	-	-
Top 5 importers' share of U.S. soybean export sales	**55%**	**59%**	**-**	**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 09/19/2024	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	1,849	1,612	15	3,298
Philippines	1,531	1,342	14	2,494
Japan	954	1,046	-9	2,125
China	139	344	-60	1,374
Korea	1,074	705	52	1,274
Taiwan	561	562	-0	921
Nigeria	255	132	92	920
Thailand	353	222	59	552
Colombia	245	154	58	522
Vietnam	274	199	38	313
Top 10 importers	**7,234**	**6,320**	**14**	**13,792**
Total U.S. wheat export sales	**11,171**	**9,165**	**22**	**18,323**
% of YTD current month's export projection	50%	48%		-
Change from prior week	159	545	-	-
Top 10 importers' share of U.S. wheat export sales	**65%**	**69%**	**-**	**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.

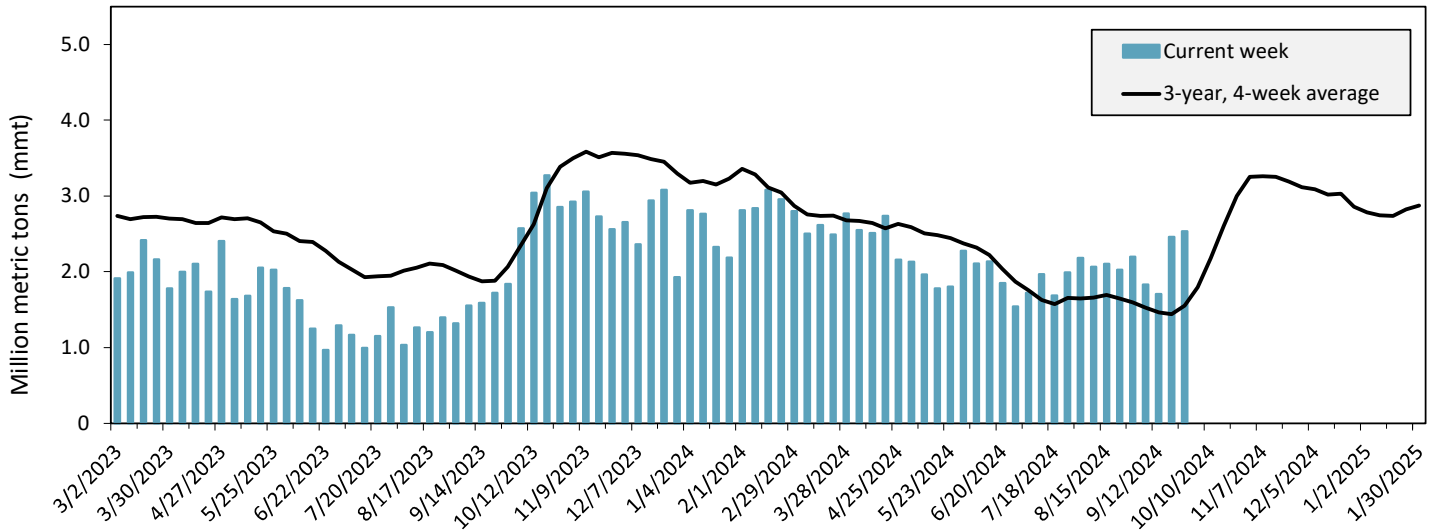
Table 16. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 09/26/2024	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	118	6	n/a	11,828	3,983	297	n/a	486	5,267
	Soybeans	0	0	n/a	2,735	3,356	81	n/a	47	10,286
	Wheat	438	392	112	9,083	7,502	121	138	122	9,814
	All Grain	**556**	**399**	**139**	**24,732**	**15,036**	**164**	**161**	**125**	**25,913**
Mississippi Gulf	Corn	787	788	100	20,519	18,507	111	138	178	23,630
	Soybeans	555	410	135	14,769	15,946	93	100	127	26,878
	Wheat	48	179	27	3,856	2,749	140	125	138	3,335
	All Grain	**1,389**	**1,377**	**101**	**39,262**	**37,202**	**106**	**123**	**154**	**53,843**
Texas Gulf	Corn	44	9	467	450	237	190	1062	214	397
	Soybeans	0	0	n/a	0	52	0	n/a	n/a	267
	Wheat	0	83	0	1,422	1,405	101	231	68	1,593
	All Grain	**223**	**170**	**131**	**4,801**	**3,933**	**122**	**169**	**109**	**5,971**
Interior	Corn	191	339	56	10,263	7,149	144	113	134	10,474
	Soybeans	94	89	106	5,174	3,916	132	154	163	6,508
	Wheat	40	47	85	2,316	1,813	128	122	98	2,281
	All Grain	**326**	**489**	**67**	**17,929**	**13,016**	**138**	**120**	**131**	**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	11	20	55	396	242	164	198	167	581
	All Grain	**11**	**20**	**55**	**414**	**327**	**127**	**119**	**121**	**831**
Atlantic	Corn	1	7	17	232	90	257	237	84	166
	Soybeans	0	0	n/a	441	1,197	37	23	16	2,058
	Wheat	0	1	n/a	66	94	70	8	7	101
	All Grain	**2**	**8**	**20**	**739**	**1,381**	**54**	**71**	**43**	**2,325**
All Regions	Corn	1,140	1,150	99	43,292	30,000	144	139	167	40,004
	Soybeans	676	499	136	23,218	24,633	94	111	126	46,459
	Wheat	537	723	74	17,138	13,807	124	140	113	17,738
	All Grain	**2,533**	**2,462**	**103**	**87,957**	**71,013**	**124**	**131**	**137**	**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.

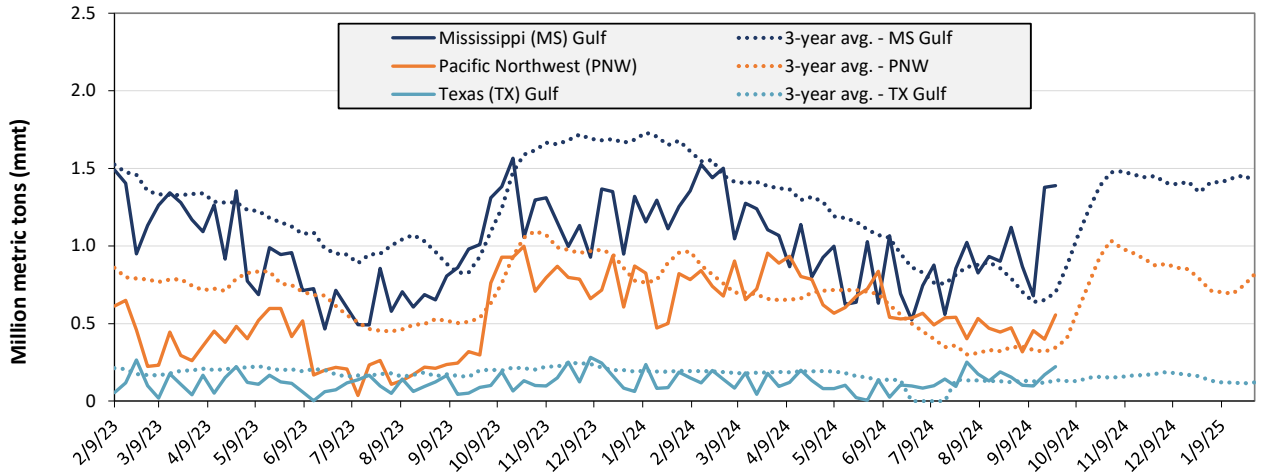
Figure 15. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Sep. 26: 2.5 mmt of grain inspected, up 3 percent from the previous week, up 48 percent from the same week last year, and up 63 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 09/26/24 inspections (mmt):
MS Gulf: 1.39
PNW: 0.56
TX Gulf: 0.22

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	un-changed	up 31	up 4	up 39
Last year (same 7 days)	up 50	up 68	up 52	up 142
3-year average (4-week moving average)	up 98	up 64	up 93	up 61

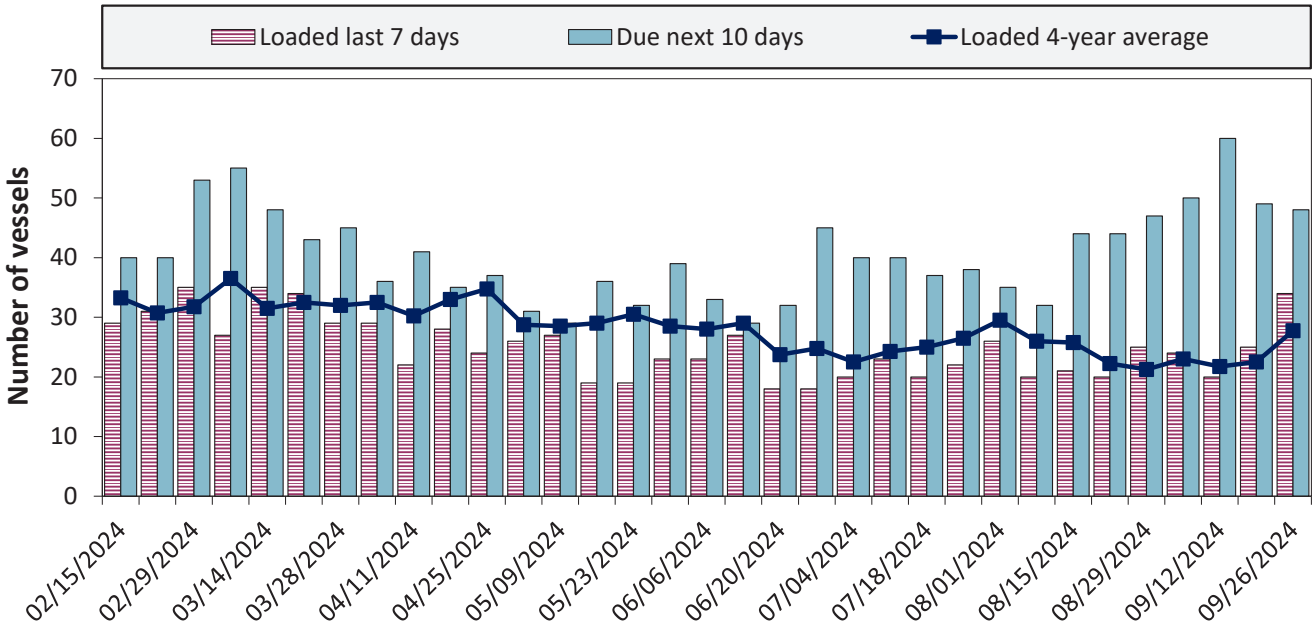
Source: USDA, Federal Grain Inspection Service.

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
9/26/2024	34	34	48	4
9/19/2024	44	25	49	9
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.

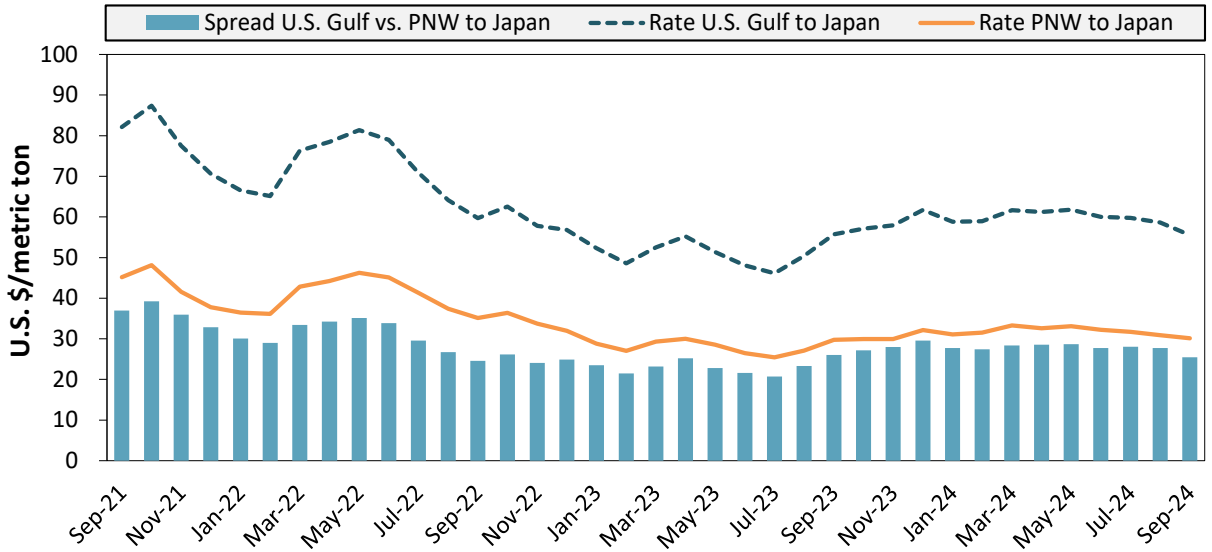
Figure 17. U.S . Gulf vessel loading activity



Week ending 9/26/24, number of vessels	Loaded	Due
Change from last year	62%	2%
Change from 4-year average	23%	-2%

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
September 2024	$56	$30	$25
Change from September 2023	-0%	1%	-2%
Change from 4-year average	-8%	-10%	-5%

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

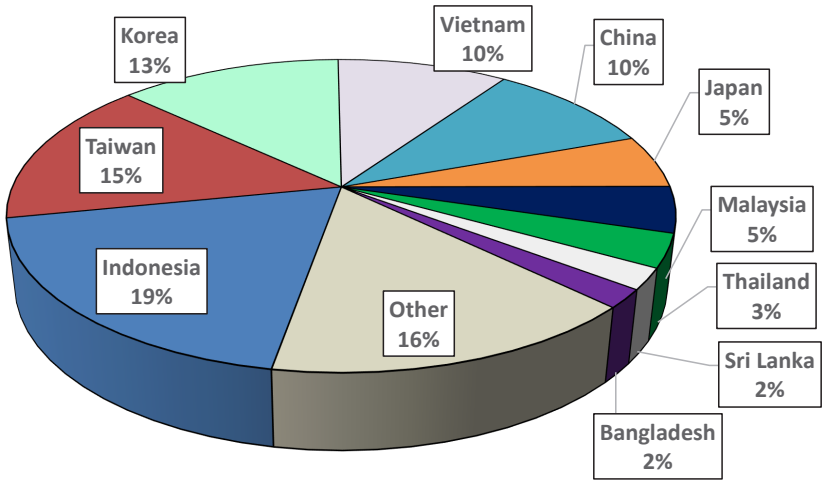
Table 18. Ocean freight rates for selected shipments, week ending 09/28/2024

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.

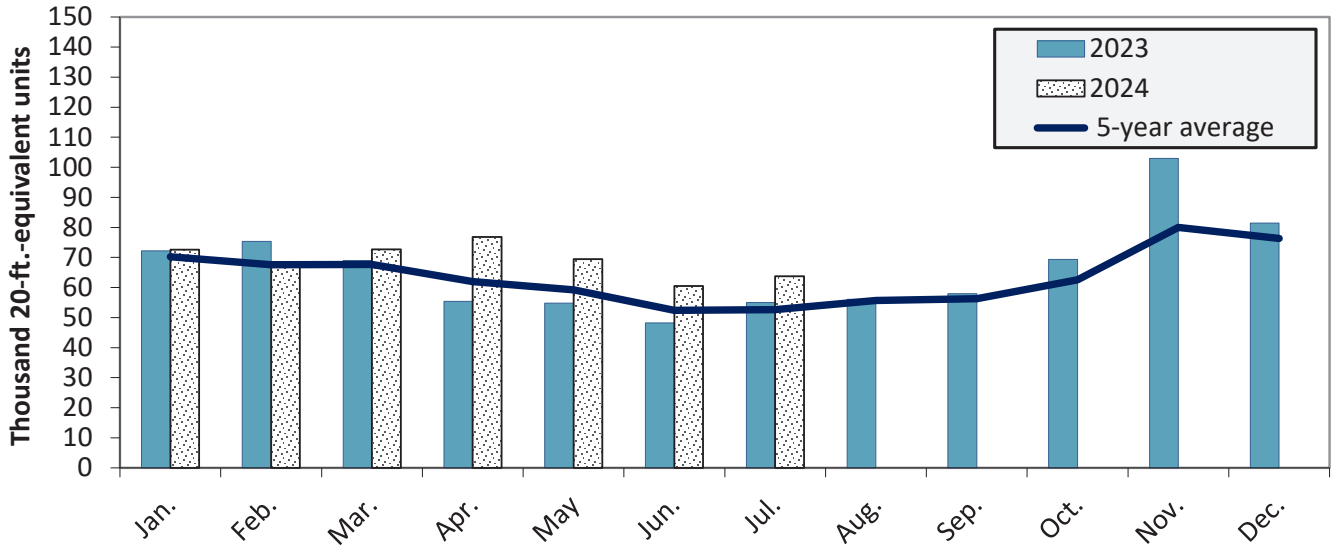
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined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