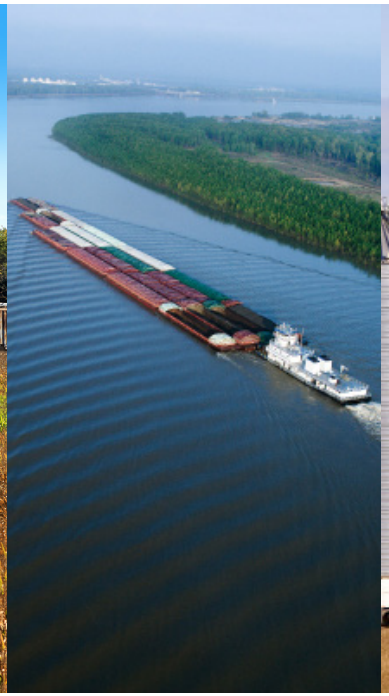
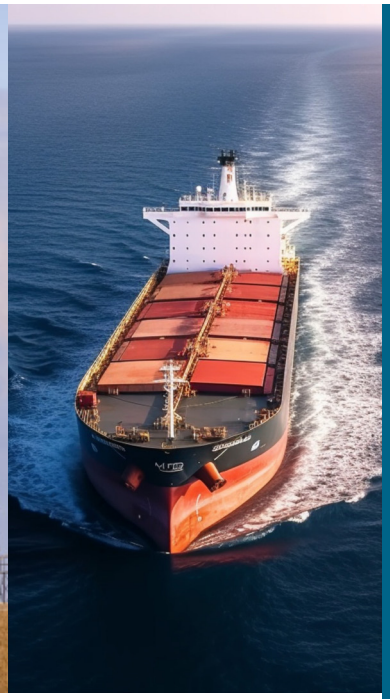
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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www.ams.usda.gov/GTR

Protest Blocks Railroad From Veracruz to Central Mexico. Since September 24, residents of Chapulco (a community in southeastern Mexico) have blockaded Ferrosur—the Mexican railroad connecting the Port of Veracruz to Central Mexico. The blockade is in protest of a past derailment that damaged the community's water supply.

According to USDA Foreign Agricultural Service's Global Agricultural Trade System (GATS), from January to August 2024, 31 percent of U.S. grain exports to Mexico (totaling 6.8 million metric tons) were shipped by ocean, from New Orleans, LA, and Houston, TX. The Port of Veracruz is the largest entry point for grain imports by ocean to Mexico.

The blockade on Ferrosur has led to a backlog of grain waiting to move from Veracruz to livestock producers in Central Mexico. However, some Mexican grain importers are substituting trucking for rail transport. The blockade on Ferrosur coincides with lingering challenges for cross-border U.S. grain exports to Mexico (*Grain Transportation Report, August 8, 2024, first highlight*).

USDA AMS Releases Fertilizer Transportation Dashboard. Today, on the Agricultural Transportation Open Data Platform ("AgTransport"), USDA's Agricultural Marketing Service (AMS) launched its Fertilizer Transportation Dashboard. The dashboard presents a variety of regularly updated, key fertilizer supply chain and transportation indicators.

Supply chain indicators include fertilizer production, inventory, and disappearance data for each primary nutrient (i.e., nitrogen, phosphorus, and potassium); U.S. fertilizer imports (both by primary nutrient and by individual fertilizer commodity); and fertilizer price data by region for key fertilizer commodities (i.e., ammonia; urea; urea ammonium nitrate (UAN); diammonium phosphate (DAP); monoammonium phosphate (MAP); and potash).

Fertilizer transportation indicators include rail volume and shipment characteristics from the Surface Transportation Board's public-use carload waybill sample; weekly rail carloads of fertilizer; a collection of rail tariff rates (i.e., fertilizer freight costs) for key routes by fertilizer commodity; and monthly barge volumes for key locks on the Mississippi River System (MRS).

USDA/AMS Adds Per Ton Barge Freight Rates for Multiple Segments on MRS. Starting today, October 10, USDA/AMS will publish weekly per ton barge freight rates for multiple locations on the Mississippi River System (MRS) on AgTransport. The data starts the first week of 2004 and will run through the most recent week.

Currently, GTR table 9 contains the percent tariff for the six MRS segments where the percent of tariff is collected each week—i.e., Twin Cities; Mid-Mississippi; Illinois River; St. Louis, MO; Ohio River; and Cairo-Memphis, TN. The table also contains an example of a per ton rate for one location in each of the six segments. The AgTransport data will include the weekly per ton rates for 26 segments of the Upper Mississippi River, Illinois River, and Lower Mississippi River.

Each week, the per ton rate is calculated as the percent of tariff collected for the six MRS segments shown in GTR table 9, multiplied by the benchmark rate for 26 MRS locations. For further explanation, see AgTransport.

In addition, beginning this week, GTR will include a new data series on barge freight rates and grain movements in the Pacific Northwest along the Columbia-Snake River System. See the feature article for more information.

Georgia Temporarily Suspends Fuel Taxes. On October 4, the Governor of Georgia announced the suspension of the State's fuel taxes. Until October 16, motorists are relieved from paying Georgia's 32.3-cent gas tax or its 36.2-cent diesel tax. The tax break is part of a state of emergency extended by the Governor following Hurricane Helene.

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 26, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 33.62 million metric tons (mmt), up 4 percent from last week and up 6 percent from the same time last year.

Net **corn export sales** for MY 2024/25, were 1.68 mmt, up significantly from last week. Net **soybean export sales** were 1.44 mmt, down 4 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.44 mmt, up significantly from last week.

Rail

U.S. Class I railroads originated 25,234 **grain carloads** during the week ending September 28. This was a 1-percent increase from the previous week, 9 percent more than last year, and 5 percent more than the 3-year average.

Average October **shuttle secondary railcar bids/offers** (per car) were $1,200 above tariff for the week ending October 3. This was $575 less than last week and $971 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $269 above tariff. This was $19 less than last week, and $119 more than this week last year.

Barge

For the week ending October 5, **barged grain movements** totaled 369,900 tons. This was 7 percent less than the previous week and 4 percent less than the same period last year.

For the week ending October 5, 246 grain barges **moved down river**—6 more than last week. There were 759 grain barges **unloaded** in the New Orleans region, 10 percent fewer than last week.

Ocean

For the week ending October 3, 35 **oceangoing grain vessels** were loaded in the Gulf—21 percent more than the same period last year. Within the next 10 days (starting October 4), 51 vessels were expected to be loaded—2 percent more than the same period last year.

As of October 3, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $55.25, 1 percent less than the previous week. The rate from the Pacific Northwest to Japan was $30.25 per mt, 1 percent less than the previous week.

Fuel

For the week ending October 7, the U.S. average **diesel price** increased 4.0 cents from the previous week to $3.584 per gallon, 91.4 cents below the same week last year.

GTR Adds Barge Data for the Columbia-Snake River

For many years, the *Grain Transportation Report* (GTR) has been a premier source for data and information on barged grain movements. However, this information has been limited to the Mississippi River System (MRS). In recent years, stakeholders have requested barged grain information about the Columbia-Snake River System (CSRS) in the Pacific Northwest (PNW).

In response, since September 2023, USDA's **Agricultural Open Data Transportation Platform** (AgTransport) has included monthly data on total barged grain volumes for key locks along the CSRS. And beginning *this week*, as detailed in this article, the GTR *now* includes new data related to barged freight rates and grain movements on the CSRS (**GTR tables 11** and **12**).

Background

While all kinds of grains and oilseeds are exported from PNW export terminals, most, if not all, of the grain moving through the CSRS's locks for export is wheat—especially soft white wheat. Most of the wheat shipped on the CSRS is grown in Eastern Washington and Eastern Oregon, but the system transports wheat grown in 10 States.[1]

PNW Wheat Exports. In 2023, of wheat inspected for export, 9.8 million tons (55 percent) came from the PNW, versus 3.3 million tons (19 percent) from the Mississippi Gulf (**GTR table 18**).

In 2023, the top destinations for PNW wheat exports were the Philippines (2.3 million metric tons (mmt)); Japan (2.0 mmt); Korea (1.2 mmt); Taiwan (1.0 mmt); and China (0.77 mmt). According to USDA's most recent **U.S. Grain Modal Share Analysis** published last month—in 2018-22, barges moved 31 percent of all wheat exports to export terminals.

CSRS Characteristics. The CSRS comprises 8 locks that connect 26 inland barged grain loading elevators to 7 grain export terminals, which mainly process wheat. After being loaded on barges between Lewiston, ID (easternmost port) and Dalles, OR (westernmost port), wheat is then shipped along the CSRS to export terminals in Portland, OR, or Vancouver, WA. The distance from Lewiston to Portland is 360 miles. These CSRS features are shown in a newly added map in **GTR fig. 14**.

Unlike MRS, the CSRS rarely has unplanned outages or delays to navigation. Every year, shippers receive ample notice that CSRS navigation will shut down for 3 weeks in early March to allow for general maintenance. When detailed locks maintenance requires longer closures (**such as this one last January**), CSRS shippers are notified well in advance, to mitigate disruptions. In contrast, on MRS, major disruptions often result from unplanned closures triggered by cyclical weather events, such as flooding in late spring (due to snow melt) and drought in late summer.

CSRS Wheat Volumes. According to the U.S. Army Corps of Engineers' (USACE) **Waterborne Commerce Statistics Center** between 2018 and 2022, yearly shipments of wheat on the CSRS ranged from 13.4 million tons to 31 million total tons, while yearly shipments of wheat on the MRS ranged from 3.9 million tons to 71.5 million tons.

CSRS Barge Rates

Composed of a base rate and a fuel surcharge, CSRS barge rates resemble how rail freight rates are calculated (**GTR table 7**).

Base Freight Rate. Once a year (typically, in late spring or early summer), CSRS barge operators set the annual base freight rates (measured in dollars per ton), which run from August 1 to July 31 of the following year. Base rates are established for routes from 12 CSRS port locations to export terminals in Portland, OR, and Vancouver, WA.[2] Delivery to Kalama,

1 U.S. Wheat Associates, "Facts About U.S. Wheat Exports and the Columbia Snake River System" (March 15, 2022).

2 The originating ports include the following: Dalles, OR; Biggs, OR; Arlington, OR; Rosevelt, WA; Boardman, OR, and Hogue Warner, OR; Umatilla, OR; Port Kelly, WA; Wallula, WA; Burbank, WA; Kennewick, WA; Pasco, WA; Sheffler, WA; Windust, WA; Lower Monumental, WA; Lyons Ferry, WA; Central Ferry, WA; Almota, WA; Lewiston, ID; Clarkston, WA; and Wilma, WA.

WA, or Longview, WA, adds $0.35 per ton to the base rate. Contingent on proximity to export terminals, rates are set higher for more distant originating ports and lower for closer originating ports.

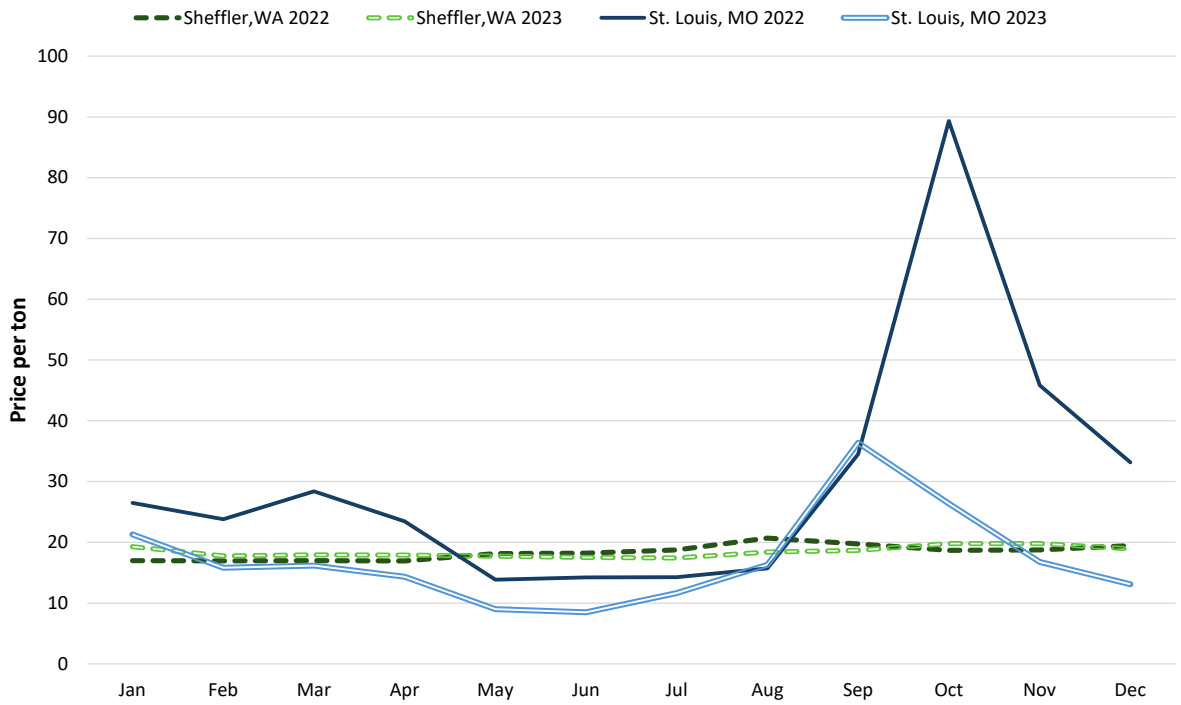
Fuel Surcharge. Although base rates change only once per year, fuel surcharges are updated monthly. Fuel surcharges are based on the monthly average (No. 2 low sulfur) diesel price in Portland, OR, from the prior 2 months.

From the base freight rate, a fuel surcharge raises or lowers the total freight cost by a fraction of a percent, as specified in a fuel surcharge schedule. The schedule is based on a benchmark diesel price of $2.55 per gallon: if the average diesel price is below $2.55 per gallon, then the base freight rate is discounted by a fuel surcharge percent. If the average diesel price surpasses $2.55 per gallon, the base freight rate is raised by the fuel surcharge percent.

Comparison to MRS Barge Rates. In contrast to CSRS rates, MRS barge rates are updated weekly, reflecting frequent changes in barge supply and demand, fuel prices, weather conditions, and other variables.

Because for the CSRS (unlike for the MRS) the influences on rates are not often volatile, CSRS rates are updated only monthly, and fuel surcharges are the only source of monthly changes. As shown in figure 1, the monthly changes at Sheffler, WA, are significantly less than those at St. Louis, MO, as are the year-to-year changes between the two locations.

Figure 1. MRS and CSRS spot rates, price per ton, 2022 and 2023



Source: USDA, Agricultural Marketing Service.

New GTR Data

Each week, the GTR has provided southbound barged grain rates for seven locations on the MRS, including spot rates (i.e., for this week), as well as rates for 1 month out and 3 months out (GTR table 9). In addition, the GTR has provided data on total barged grain volumes (GTR table 10), upbound empty barges, and barges unloaded in the New Orleans area (GTR figs. 12 and 13). These datasets are also available on AgTransport.

New Barge Rates in GTR table 11. The new GTR table 11 shows barge freight rates on the CSRS. The table displays the origin, originating river, current month's price per ton, previous month's price per ton, same month's price per ton for the previous year, current month's percent change from last year, and current month's percent change from the 3-year average for each of the 12 originating ports.

The new GTR table 11 will reflect both the yearly base rates and monthly changes of the fuel surcharge (as previously detailed). The

year-to-year change will reflect both the changes in barge rates from year to year and fuel surcharge month to month.

The CSRS barge rate and the monthly and yearly comparisons will be updated each month for the current month. The same updates will also be available on **AgTransport**, with interactive charts and downloadable data. The latest month is October 2024, with data going back to January 2022.

Barged Volumes in GTR table 12. The new **GTR table 12** shows the barged grain movements through the McNary Lock and Dam (Lock 24), on the Snake River, and through the Bonneville Lock and Dam (Lock 1) on the Columbia River. The Lock 24 data illustrate grain volumes moving from Idaho to Oregon, while Lock 1 data show grain volumes moving to Portland for export.

The data are broken down into volumes of "wheat" (the largest barged grain commodity on the CSRS by volume) and "other" grain (corn, soybeans, oats, barley, and rye combined), along with a year-to-date total. Beginning in November 2024, GTR table 12 will include the percent change from the same month of the previous year. Barged grain volumes will be updated monthly, showing values for the preceding month (the most recent available).

According to the **USACE Lock Performance Monitoring System**, year to date as of September 28, 2.2 million tons of wheat have moved through the locks along the CSRS to Portland, OR, or Vancouver, WA, for export, and 1.4 million tons of wheat (20 million tons of total grain) have moved through the locks along the MRS to the Gulf for export (**GTR table 10**).

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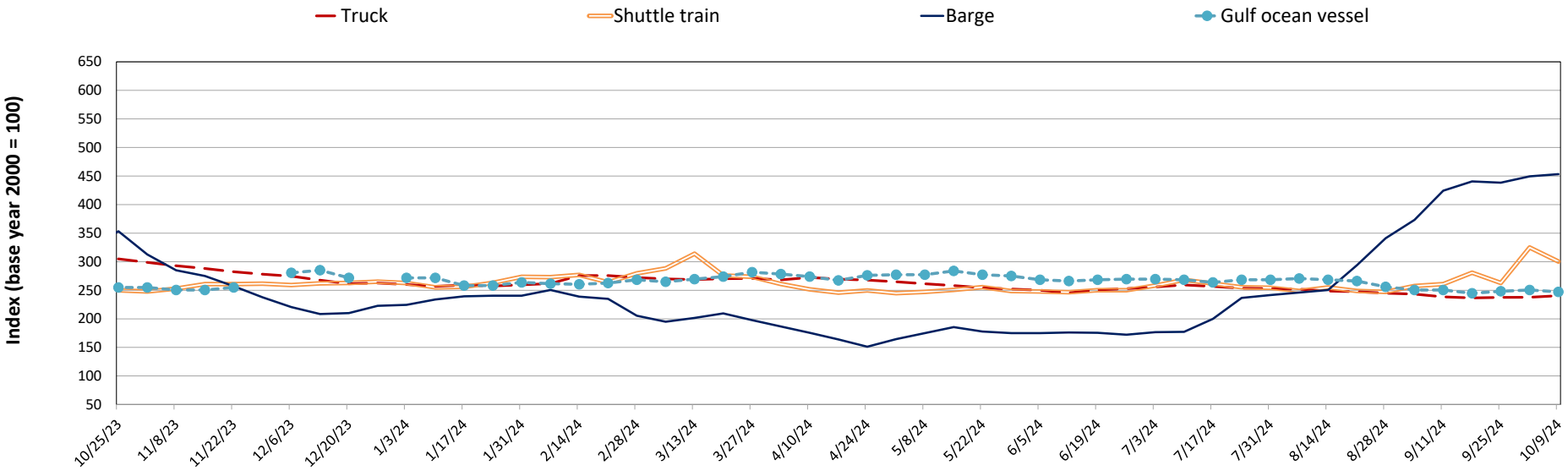
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
10/09/24	241	343	300	453	247	215
10/02/24	238	339	325	449	250	216
10/11/23	302	336	269	366	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.

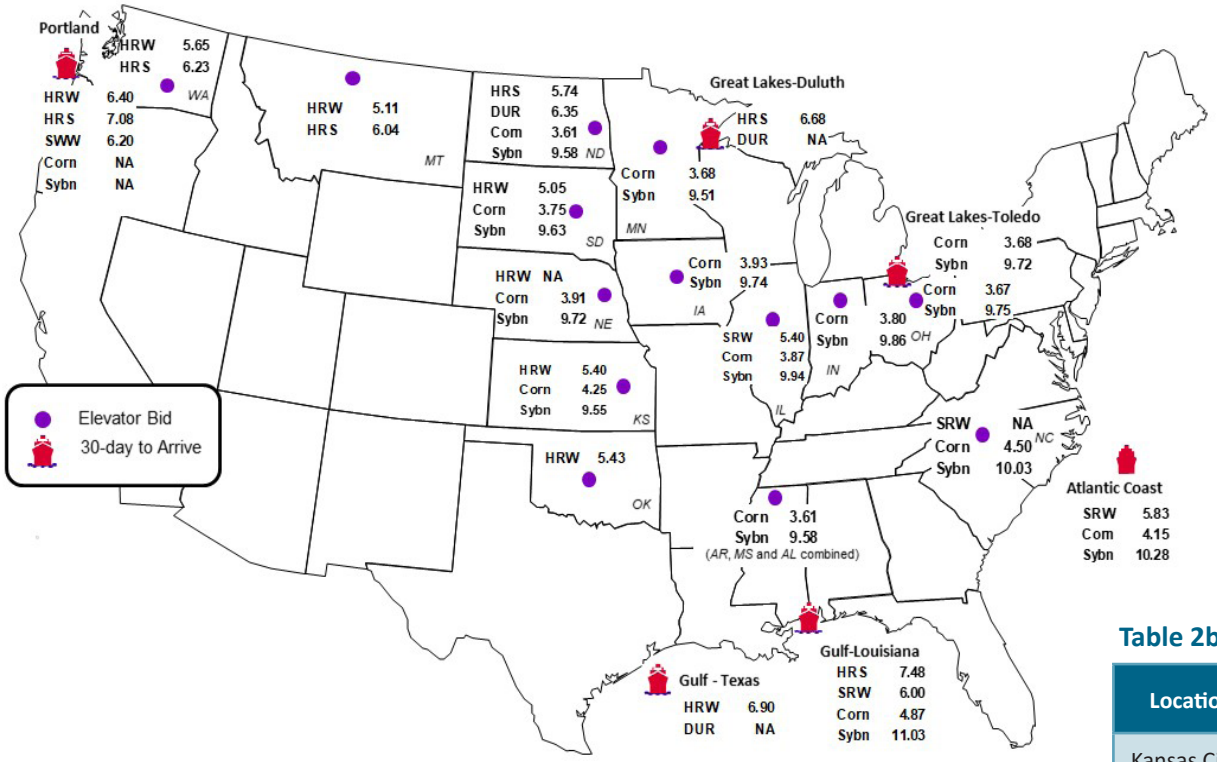
Figure 1. Grain transportation cost indicators as of week ending 10/9/24



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	10/4/2024	9/27/2024
Corn	IL–Gulf	-1.00	-0.99
Corn	NE–Gulf	-0.96	-0.91
Soybean	IA–Gulf	-1.29	-1.32
HRW	KS–Gulf	-1.50	-1.66
HRS	ND–Portland	-1.34	-1.71

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	10/4/2024	Week ago 9/27/2024	Year ago 10/6/2023
Kansas City	Wheat	Dec	6.014	5.810	6.810
Minneapolis	Wheat	Dec	6.384	6.082	7.204
Chicago	Wheat	Dec	5.936	5.846	5.766
Chicago	Corn	Dec	4.244	4.170	4.940
Chicago	Soybean	Nov	10.314	10.594	12.706

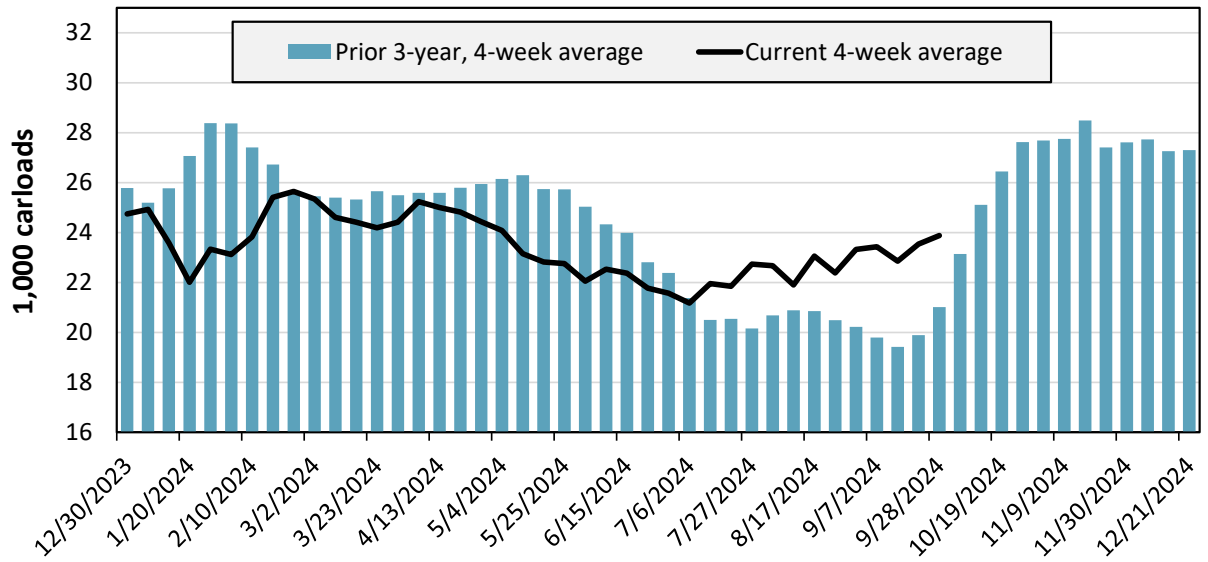
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 9/28/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,583	2,135	11,886	5,337	2,686	1,607	25,234
This week last year	1,413	1,770	9,202	6,116	3,464	1,151	23,116
2024 YTD	64,179	103,412	407,144	198,771	103,501	37,417	914,424
2023 YTD	65,879	96,523	338,914	200,047	90,442	47,982	839,787
2024 YTD as % of 2023 YTD	97	107	120	99	114	78	109
Last 4 weeks as % of 2023	124	157	120	106	87	124	115
Last 4 weeks as % of 3-yr. avg.	128	145	117	99	95	146	114
Total 2023	92,754	130,762	499,462	278,079	131,352	66,535	1,198,944

Note: The last 4-week percentages compare the last 4 weeks of this year to the closest 4 weeks of last year, and to the average across the prior 3 years. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.
Source: Surface Transportation Board.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending September 28, grain carloads were up 1 percent from the previous week, up 15 percent from last year, and up 14 percent from the 3-year average.

Source: Surface Transportation Board.

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

For the week ending: 9/28/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	27.8	51.0	9.8	18.4	8.1	27.1	50.6	27.5
	Average over last 4 weeks	29.3	32.1	12.0	18.7	8.0	15.8	34.5	21.5
	Average of same 4 weeks last year	35.7	39.2	7.2	11.4	8.5	33.8	15.1	21.6
Grain unit train speeds (miles per hour)	This week	22.6	17.9	24.2	22.5	23.4	20.7	22.1	21.9
	Average over last 4 weeks	23.2	19.1	24.7	22.6	24.0	20.1	22.5	22.3
	Average of same 4 weeks last year	25.1	16.4	25.4	23.8	24.5	19.3	24.4	22.7

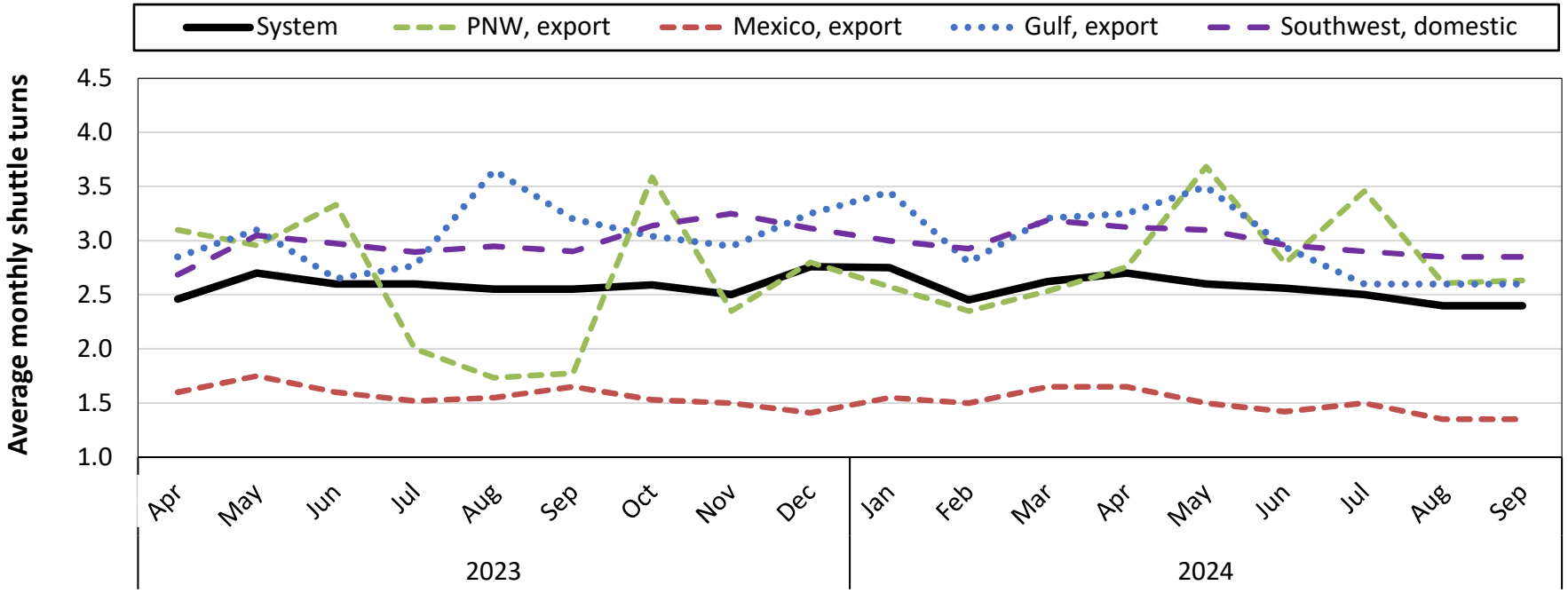
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form CPKC, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics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

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

For the week ending: 9/28/2024		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	30	4	429	106	3	61	73	707
	Average over last 4 weeks	37	7	474	98	4	56	58	733
	Average of same 4 weeks last year	17	13	450	76	3	103	22	685
Loaded grain cars not moved in over 48 hours (number)	This week	23	221	444	136	6	146	35	1,011
	Average over last 4 weeks	42	147	474	193	4	115	68	1,043
	Average of same 4 weeks last year	16	213	282	104	4	208	9	837
Grain unit trains held (number)	This week	0	0	8	12	0	1	2	24
	Average over last 4 weeks	0	0	8	12	0	4	3	26
	Average of same 4 weeks last year	0	3	7	6	0	5	6	27
Unfilled grain car orders (number)	This week	6	16	761	268	0	574	425	2,050
	Average over last 4 weeks	2	4	754	517	0	405	279	1,961
	Average of same 4 weeks last year	0	25	452	203	0	493	6	1,180

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

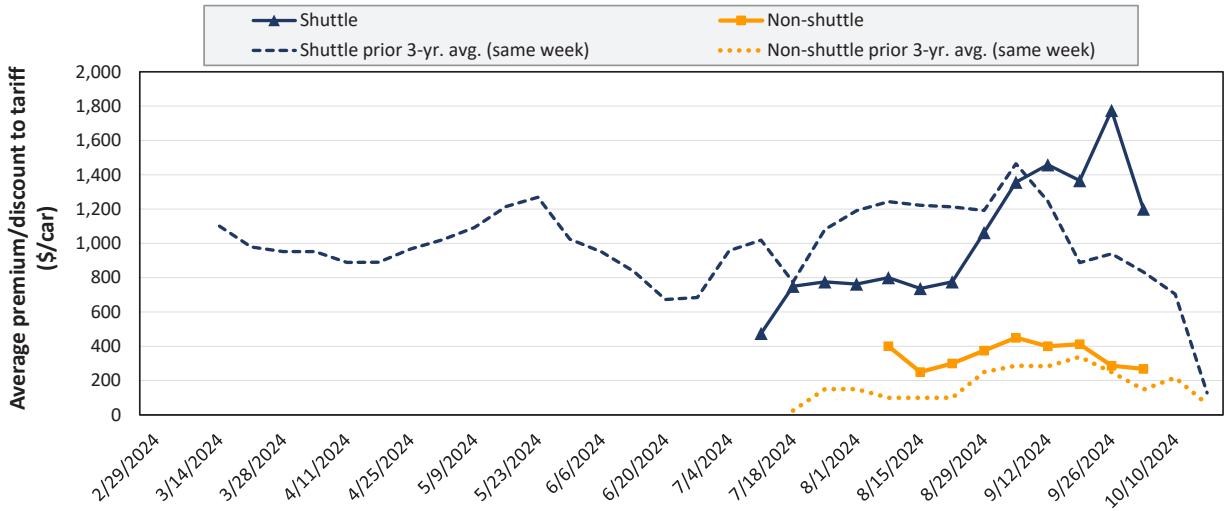


Average monthly system-wide grain shuttle turns reported in the first week of September 2024 were 2.4. By destination region, average monthly grain shuttle turns were 2.63 to PNW, 1.35 to Mexico, 2.6 to the Gulf, and 2.85 to the Southwest.

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



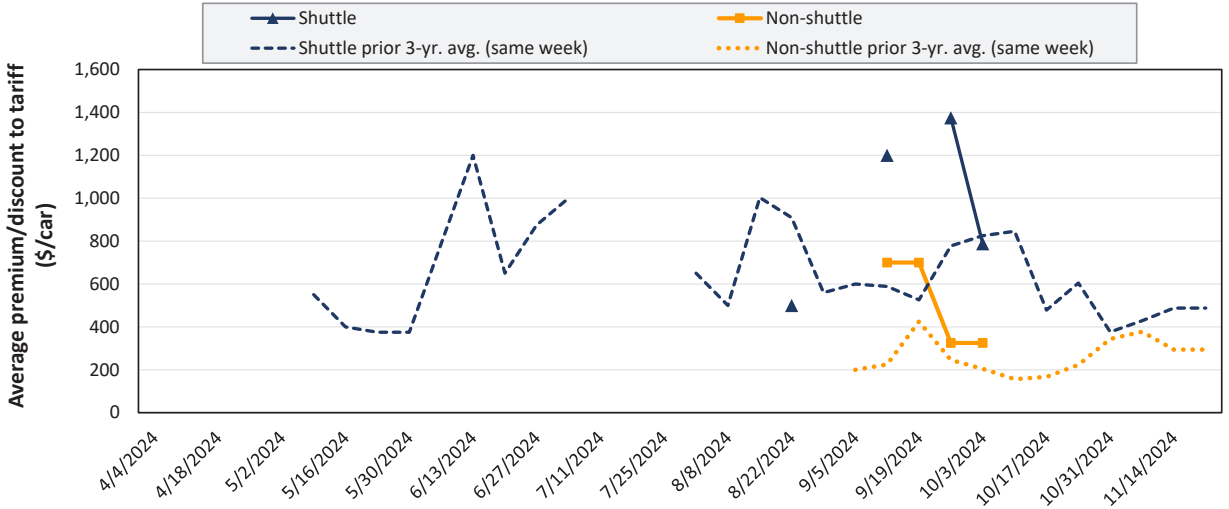
Average non-shuttle bids/offers fell $19 this week, and are $181 below the peak.

Average shuttle bids/offers fell $575 this week and are $575 below the peak.

10/3/2024	BNSF	UP
Non-Shuttle	$363	$175
Shuttle	$1,225	$1,175

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



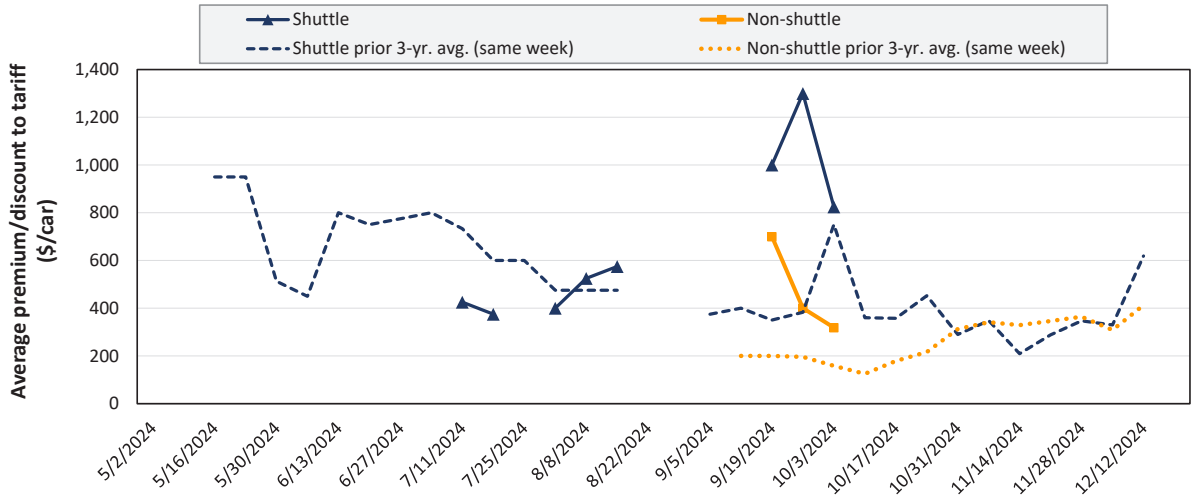
Average non-shuttle bids/offers are unchanged this week, and are $375 below the peak.

Average shuttle bids/offers fell $588 this week and are $588 below the peak.

10/3/2024	BNSF	UP
Non-Shuttle	$375	$275
Shuttle	$875	$700

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 $81 this week, and are $381 below the peak.

Average shuttle bids/offers fell $475 this week and are $475 below the peak.

10/3/2024	BNSF	UP
Non-Shuttle	$375	$263
Shuttle	$825	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: 10/3/2024		Delivery period					
		Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25
Non-shuttle	BNSF	363	375	375	n/a	n/a	n/a
	Change from last week	-12	-25	-25	n/a	n/a	n/a
	Change from same week 2023	163	25	n/a	n/a	n/a	n/a
	UP	175	275	263	n/a	n/a	n/a
	Change from last week	-25	25	n/a	n/a	n/a	n/a
	Change from same week 2023	75	100	63	n/a	n/a	n/a
Shuttle	BNSF	1,225	875	825	n/a	n/a	n/a
	Change from last week	-325	-625	-475	n/a	n/a	n/a
	Change from same week 2023	950	n/a	n/a	n/a	n/a	n/a
	UP	1,175	700	n/a	n/a	n/a	n/a
	Change from last week	-825	-550	n/a	n/a	n/a	n/a
	Change from same week 2023	992	n/a	n/a	n/a	n/a	n/a
	CPKC	1,275	450	n/a	n/a	n/a	n/a
	Change from last week	25	100	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

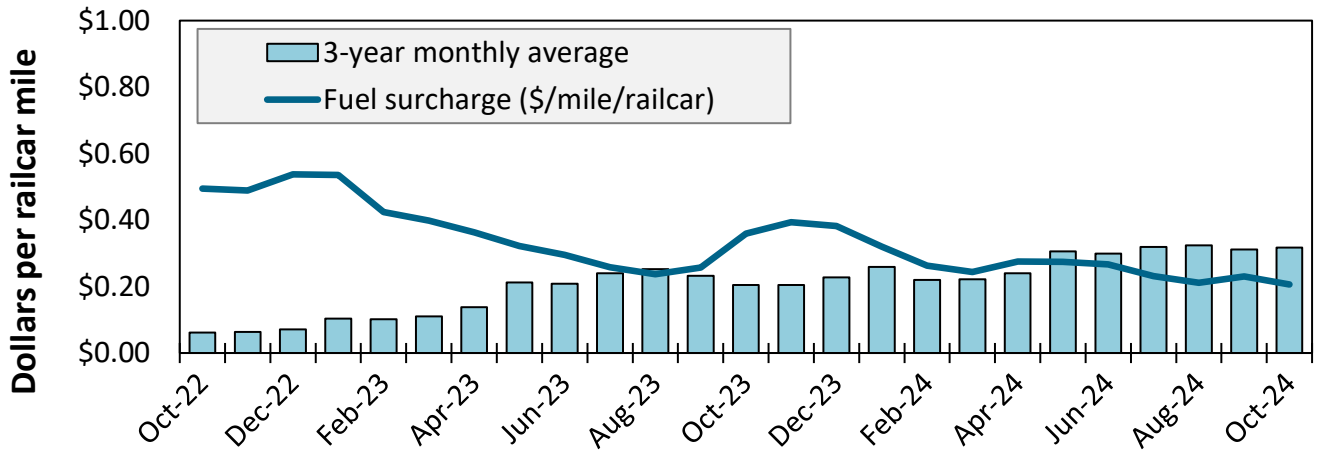
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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	5.8	1.3
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,121	$50.40	$1.28	5.6	2.6
Soybeans	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,590	$55.02	$1.50	1.5	-1.7
	Brunswick, MO	Eagle Pass, TX	BNSF	Shuttle	$5,462	$53.76	$1.46	-0.6	-3.4
	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).

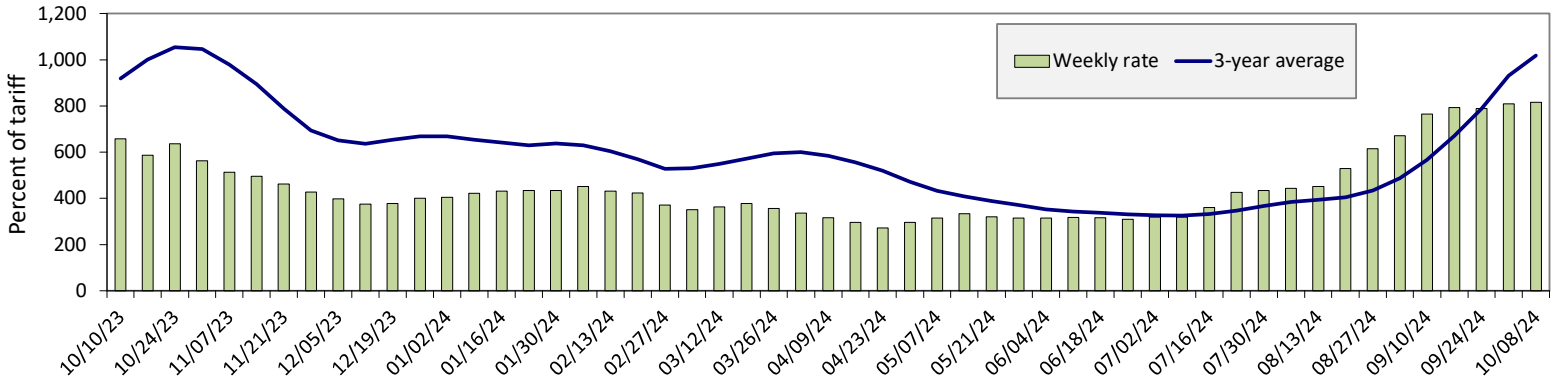
Figure 8. Railroad fuel surcharges, North American weighted average



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 8: 1 percent higher than the previous week; 24 percent higher than last year; and 20 percent lower than the 3-year average.

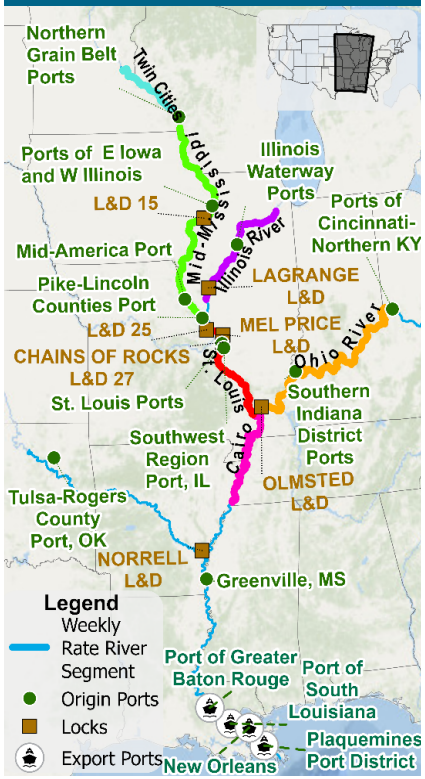
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.
Source: USDA, Agricultural Marketing Service.

Table 9. Weekly barge freight rates: southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	10/8/2024	792	831	816	782	812	666
	10/1/2024	790	834	809	750	811	696
$/ton	10/8/2024	49.02	44.21	37.86	31.20	38.08	20.91
	10/1/2024	48.90	44.37	37.54	29.93	38.04	21.85
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	28	28	24	22	17	7
	3-year avg.	-15	-19	-20	-32	-29	-47
Rate	November	638	604	589	504	566	449
	January	n/a	n/a	511	403	410	353

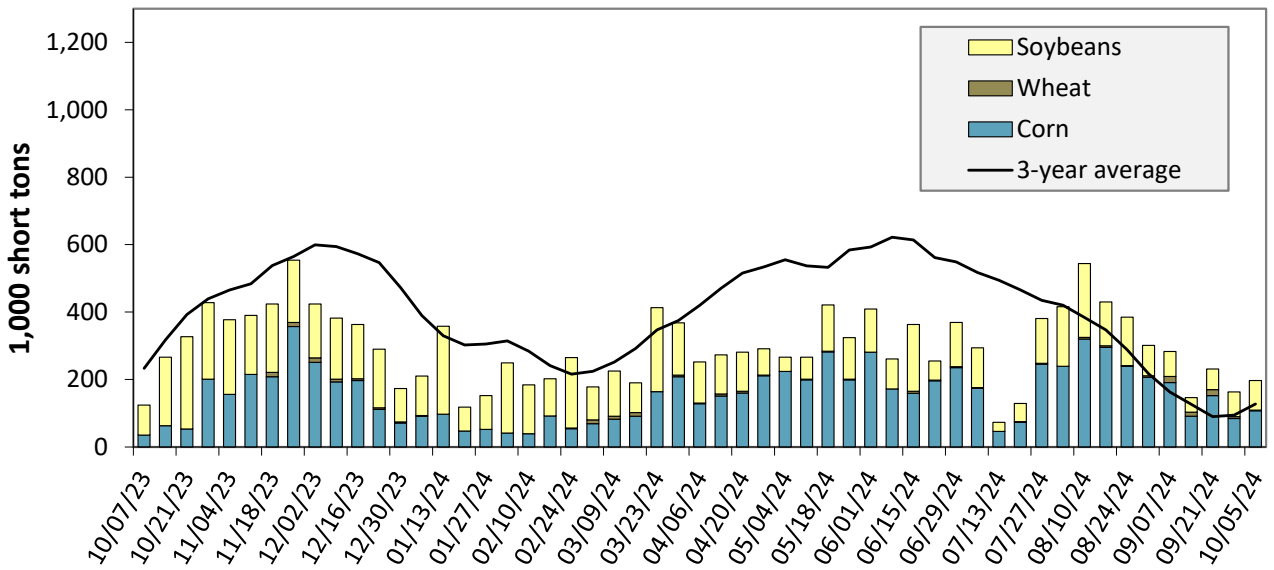
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of $6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi assumes a base rate of $5.32 (Savanna, IL, to Keithsburg, IL). The per ton rate on the Illinois River assumes a base rate of $4.64 (Havana, IL, to Hardin, IL). The per ton rate at St. Louis assumes a base rate of $3.99 (Grafton, IL, to Cape Girardeau, MO). The per ton rate on the Ohio River assumes a base rate of $4.69 (Silver Grove, KY, to Madison, IN). The per ton rate at Memphis-Cairo assumes a base rate of $3.14 (West Memphis, AR, to Memphis, TN). For more on base rate values along the various segments of the Mississippi River System, see AgTransport.
Source: USDA, Agricultural Marketing Service.

Figure 10. Benchmark tariff rates



Source: USDA, Agricultural Marketing Service.

Figure 11. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending October 5: 59 percent higher than last year and 55 percent higher than the 3-year average.

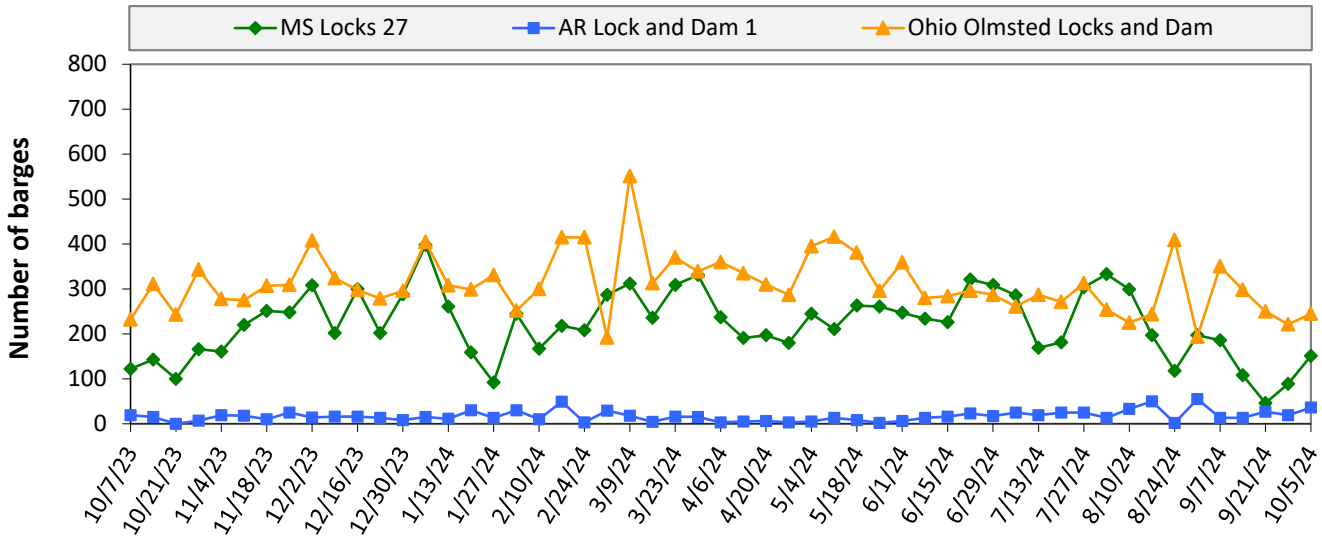
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 10/05/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	27	2	81	0	109
Mississippi River (Winfield, MO (L25))	109	2	79	0	189
Mississippi River (Alton, IL (L26))	113	2	94	0	209
Mississippi River (Granite City, IL (L27))	107	2	88	0	196
Illinois River (La Grange)	28	0	28	0	57
Ohio River (Olmsted)	92	4	39	7	141
Arkansas River (L1)	0	11	21	0	32
Weekly total - 2024	199	16	147	7	370
Weekly total - 2023	154	10	222	0	386
2024 YTD	11,258	1,382	7,643	178	20,462
2023 YTD	9,298	1,149	7,798	202	18,447
2024 as % of 2023 YTD	121	120	98	88	111
Last 4 weeks as % of 2023	202	186	101	481	150
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.

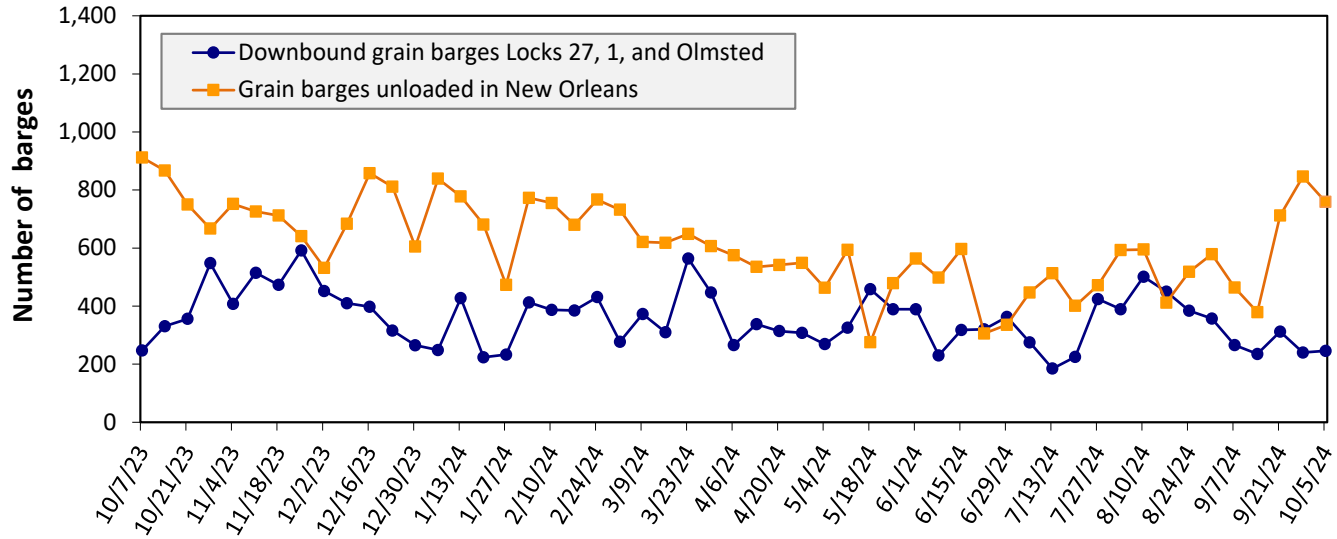
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending October 5: 432 barges transited the locks, 103 barges more than the previous week, and 20 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 October 5: 246 barges moved down river, 6 more than the previous week; 759 grain barges unloaded in the New Orleans Region, 10 percent fewer than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		October 2024	September 2024	October 2023	Last year	3-year avg.
Snake River	Lewiston,ID/Clarkston, WA/Wilma, WA	$21.64	$21.87	$22.66	-4.5	2.4
	Central Ferry, WA/Almota, WA	$20.74	$20.97	$21.79	-4.8	2.1
	Lyons Ferry, WA	$19.73	$19.96	$20.82	-5.2	1.7
	Windust, WA/Lower Monumental, WA	$18.70	$18.93	$19.83	-5.7	1.2
	Sheffler, WA	$18.67	$18.90	$19.80	-5.7	1.2
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.47	$17.70	$18.65	-6.3	0.7
	Port Kelly, WA/Wallula, WA	$17.25	$17.48	$18.44	-6.4	0.5
	Umatilla, OR	$17.15	$17.38	$18.34	-6.4	0.5
	Boardman, OR/Hogue Warner, OR	$16.89	$17.12	$18.09	-6.6	0.4
	Arlington, OR/Roosevelt, WA	$16.73	$16.96	$17.94	-6.7	0.3
	Biggs, OR	$15.40	$15.63	$16.66	-7.5	-0.5
	The Dalles, OR	$14.30	$14.53	$15.60	-8.3	-1.2

Note: Destination is Portland, OR or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

Table 12. Monthly barged grain movements Columbia-Snake (1,000 tons)

September, 2024	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	320	0	320
Columbia River (Bonneville Lock and Dam (L1))	273	0	273
Monthly total 2024	273	0	273
Monthly total 2023	n/a	n/a	n/a
2024 YTD	2,156	0	2,156
2023 YTD	n/a	n/a	n/a

Note: "Other" refers to corn, soybeans, oats, barely, and rye. Total may not add up due to rounding. "Monthly total" refers to grain moving through Lock 1, headed for export.
YTD = year to date. "L" (as in "L1") refers to lock, locks, or lock and dam facility.
n/a = data not available.
Source: U.S. Army Corps of Engineers.

Figure 14. Dam and port locations on Columbia-Snake River

Source: USDA, Agricultural Marketing Service.

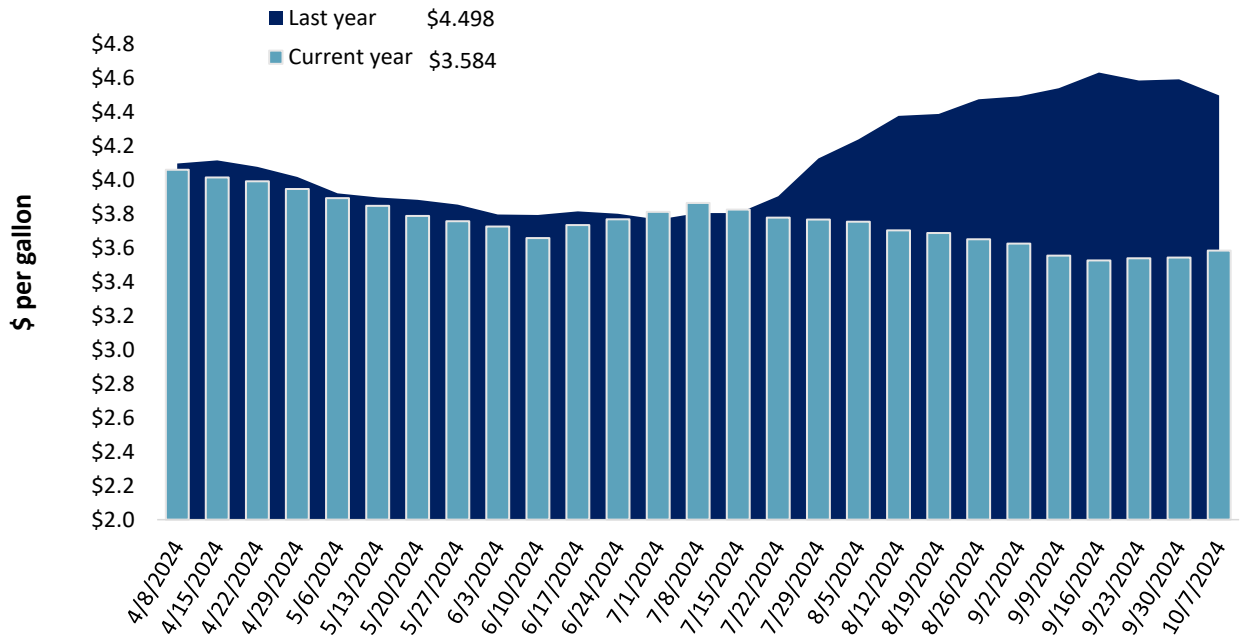
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 10/07/2024 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.563	-0.008	-0.895
	New England	3.765	-0.023	-0.812
	Central Atlantic	3.821	0.019	-0.900
	Lower Atlantic	3.447	-0.016	-0.902
II	Midwest	3.587	0.067	-0.789
III	Gulf Coast	3.266	0.054	-0.873
IV	Rocky Mountain	3.620	0.008	-1.097
V	West Coast	4.261	0.035	-1.339
	West Coast less California	3.841	0.044	-1.252
	California	4.742	0.023	-1.436
Total	United States	3.584	0.040	-0.914

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 15. Weekly diesel fuel prices, U.S. average



For the week ending October 7, the U.S. average diesel fuel price increased 4 cents from the previous week to $3.584 per gallon, 91.4 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 14. 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 9/26/2024	862	570	1,158	934	66	3,589	13,022	17,008	33,618
	This week year ago	620	618	1,293	878	170	3,579	11,714	16,392	31,684
	Last 4 wks. as % of same period 2023/24	154	99	104	121	35	113	110	95	103
Current shipped (cumulative) exports sales	2024/25 YTD	1,830	1,283	2,701	2,071	141	8,026	3,406	1,934	13,366
	2023/24 YTD	1,044	1,430	2,134	1,141	111	5,860	2,671	2,061	10,591
	YTD 2024/25 as % of 2023/24	175	90	127	181	0	137	128	94	126
	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. YTD totals for wheat are for MY 2024/25 and MY 2023/2024, respectively while YTD totals for corn and soybeans are for MY 2023/24 and 2022/23, respectively.
Source: USDA, Foreign Agricultural Service.

Table 15. Top 5 importers of U.S. corn

For the week ending 9/26/2024	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	7,716	7,520	3	17,746
Japan	1,900	1,596	19	9,366
China	6	779	-99	8,233
Colombia	1,357	835	63	4,383
Korea	152	61	150	1,565
Top 5 importers	11,131	10,790	3	41,293
Total U.S. corn export sales	16,428	14,385	14	51,170
% of YTD current month's export projection	28%	25%	-	-
Change from prior week	1,684	1,816	-	-
Top 5 importers' share of U.S. corn export sales	68%	75%	-	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) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = carryover plus accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

Table 16. Top 5 importers of U.S. soybeans

For the week ending 9/26/2024	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	7,538	8,047	-6	28,636
Mexico	1,384	1,846	-25	4,917
Japan	515	657	-22	2,231
Egypt	496	130	283	2,228
Indonesia	513	348	47	1,910
Top 5 importers	10,445	11,027	-5	39,922
Total U.S. soybean export sales	18,942	18,452	3	51,302
% of YTD current month's export projection	38%	40%	-	-
Change from prior week	1,444	809	-	-
Top 5 importers' share of U.S. soybean export sales	55%	60%	-	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) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

Table 17. Top 10 importers of all U.S. wheat

For the week ending 09/26/2024	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	1,896	1,654	15	3,298
Philippines	1,545	1,436	8	2,494
Japan	1,124	1,047	7	2,125
China	139	346	-60	1,374
Korea	1,083	709	53	1,274
Taiwan	561	653	-14	921
Nigeria	255	133	92	920
Thailand	416	222	87	552
Colombia	245	178	37	522
Vietnam	271	213	27	313
Top 10 importers	7,533	6,592	14	13,792
Total U.S. wheat export sales	11,615	9,439	23	18,323
% of YTD current month's export projection	52%	49%		-
Change from prior week	444	273	-	-
Top 10 importers' share of U.S. wheat export sales	65%	70%	-	75%
USDA forecast, September 2024	22,453	19,241	17	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2022/23 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = carryover plus accumulated export (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

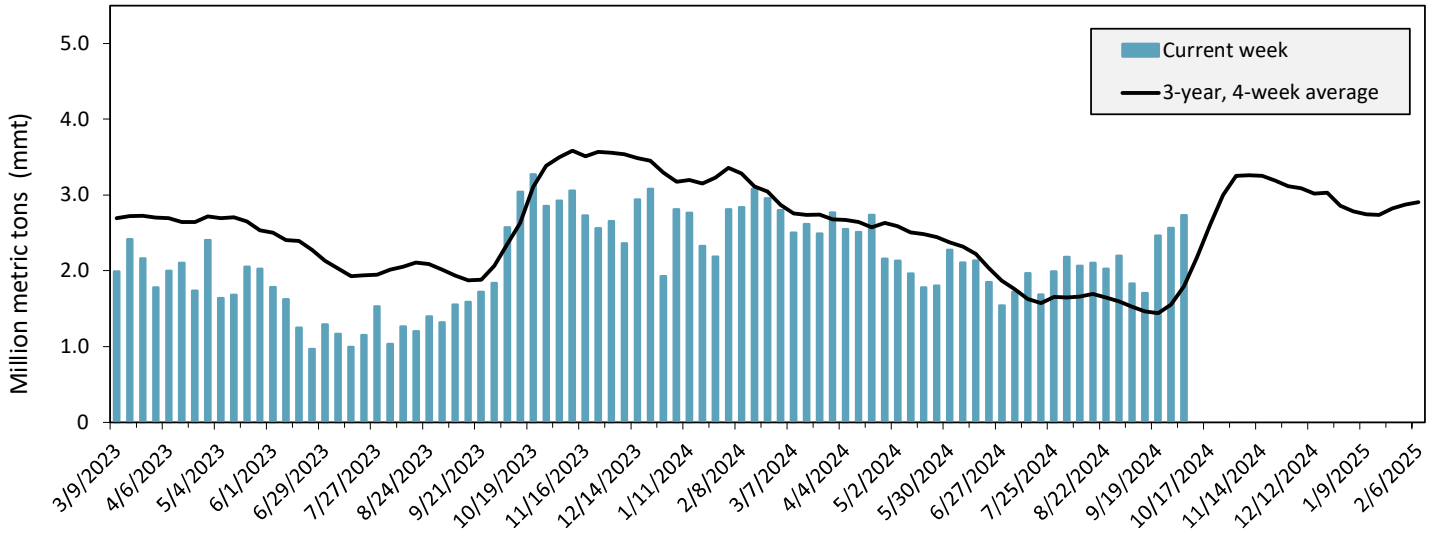
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 10/03/2024	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	248	118	210	12,076	3,983	303	n/a	2790	5,267
	Soybeans	410	0	n/a	3,146	3,763	84	117	110	10,286
	Wheat	239	438	55	9,322	7,674	121	142	121	9,814
	All Grain	898	556	162	25,629	15,615	164	166	144	25,913
Mississippi Gulf	Corn	447	787	57	20,966	19,064	110	127	141	23,630
	Soybeans	824	555	149	15,593	16,683	93	99	137	26,878
	Wheat	64	48	134	3,920	2,855	137	112	116	3,335
	All Grain	1,335	1,389	96	40,597	38,602	105	113	138	53,843
Texas Gulf	Corn	8	44	18	458	243	188	1166	359	397
	Soybeans	0	0	n/a	0	52	0	n/a	n/a	267
	Wheat	0	0	n/a	1,422	1,438	99	113	41	1,593
	All Grain	9	223	4	4,810	4,028	119	162	96	5,971
Interior	Corn	177	196	91	10,446	7,415	141	92	111	10,474
	Soybeans	147	101	146	5,329	4,060	131	131	144	6,508
	Wheat	28	54	51	2,357	1,834	129	127	89	2,281
	All Grain	354	355	100	18,311	13,449	136	104	114	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	32	11	293	429	272	157	117	123	581
	All Grain	32	11	293	447	357	125	107	107	831
Atlantic	Corn	53	6	898	289	101	285	396	271	166
	Soybeans	0	0	n/a	441	1,198	37	33	17	2,058
	Wheat	0	0	n/a	66	96	69	9	4	101
	All Grain	53	6	852	796	1,395	57	210	119	2,325
All Regions	Corn	933	1,150	81	44,234	30,841	143	133	150	40,004
	Soybeans	1,431	683	210	24,657	25,922	95	107	135	46,459
	Wheat	363	551	66	17,515	14,172	124	130	101	17,738
	All Grain	2,731	2,566	106	90,722	73,565	123	124	132	108,664

*Note: Data includes 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 the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

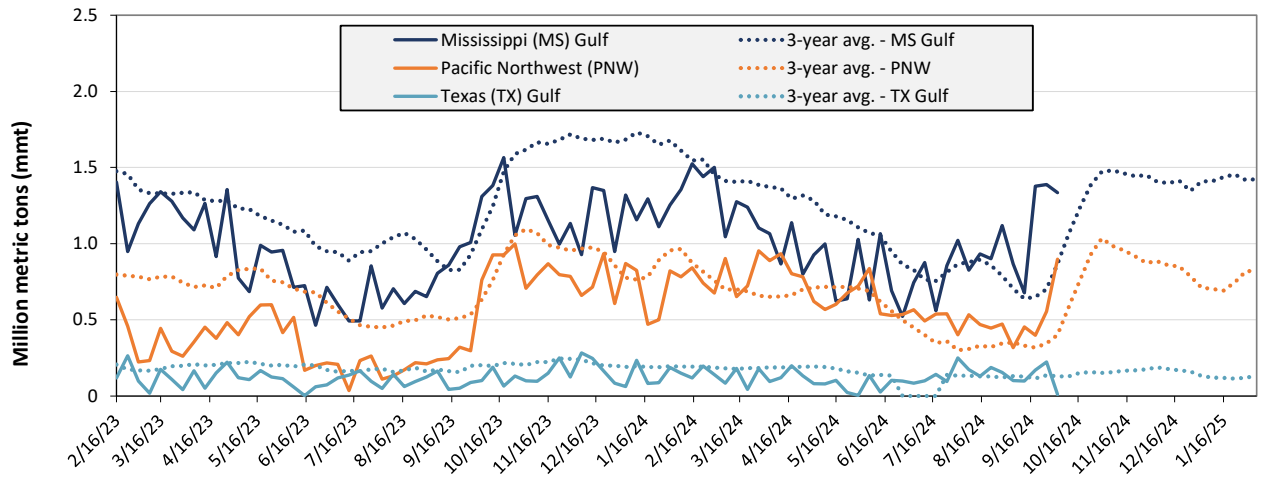
Figure 16. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Oct. 3: 2.7 mmt of grain inspected, up 6 percent from the previous week, up 7 percent from the same week last year, and up 52 percent from the 3-year, 4-week average.

Notes: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 17. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 10/03/24 inspections (mmt):
MS Gulf: 1.34
PNW: 0.9
TX Gulf: 0.01

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 4	down 96	down 17	up 62
Last year (same 7 days)	down 5	down 90	down 10	up 55
3-year average (4-week moving average)	up 54	down 93	up 35	up 124

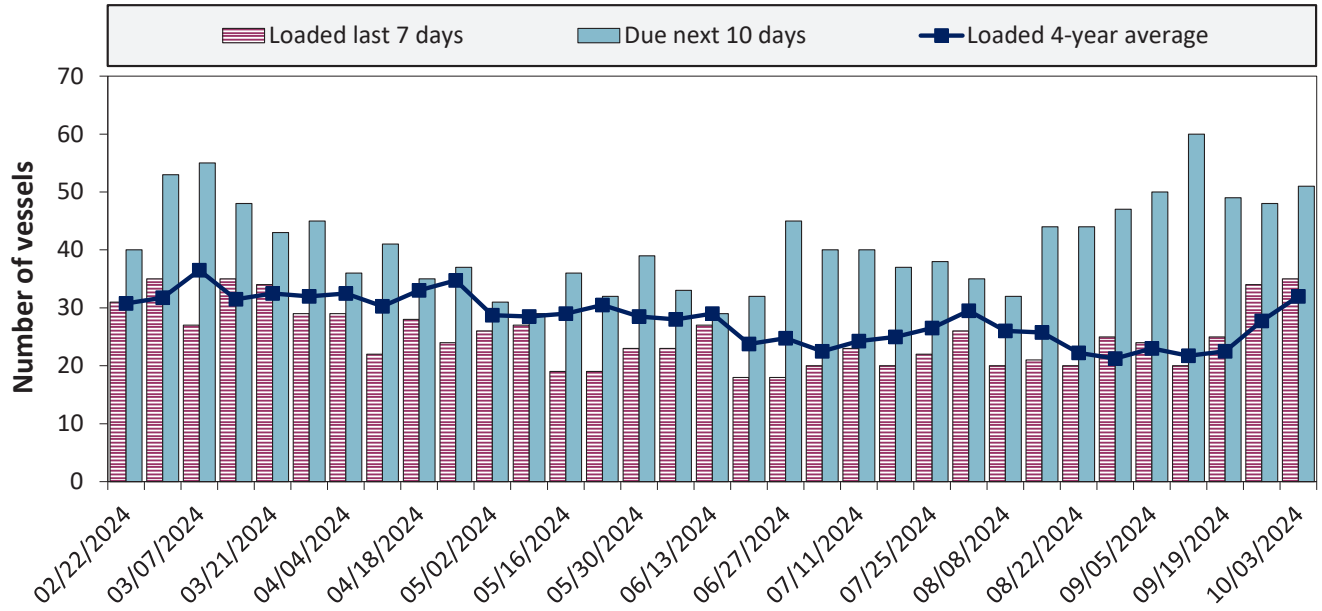
Source: USDA, Federal Grain Inspection Service.

Table 19. 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
10/3/2024	39	35	51	13
9/26/2024	34	34	48	4
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.

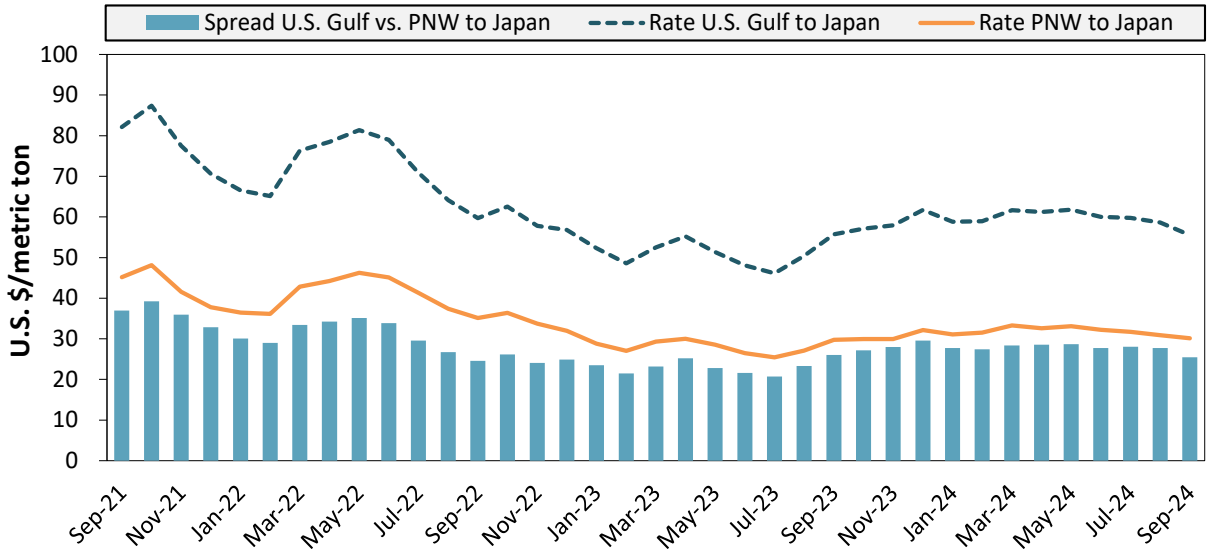
Figure 18. U.S . Gulf vessel loading activity



Week ending 10/3/24, number of vessels	Loaded	Due
Change from last year	21%	2%
Change from 4-year average	9%	-2%

Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.
Source: USDA, Agricultural Marketing Service.

Figure 19. 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.

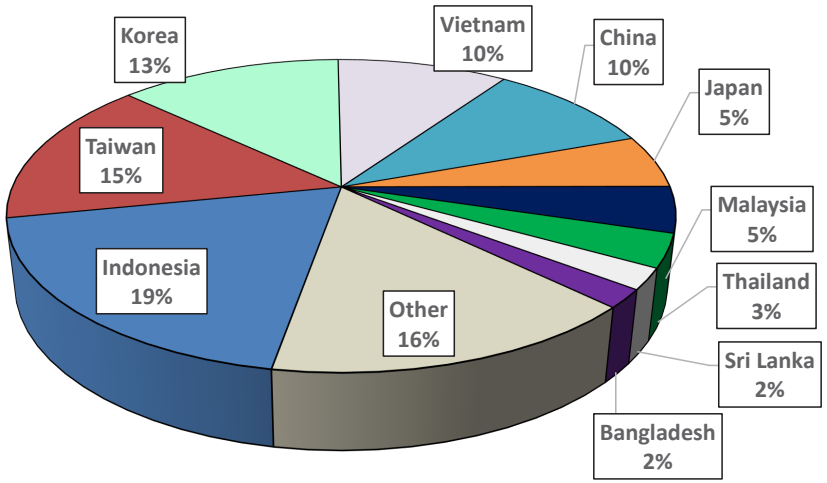
Table 20. Ocean freight rates for selected shipments, week ending 10/6/2024

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 30, 2024	Oct 1/10, 2024	58,000	62.00
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
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

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.

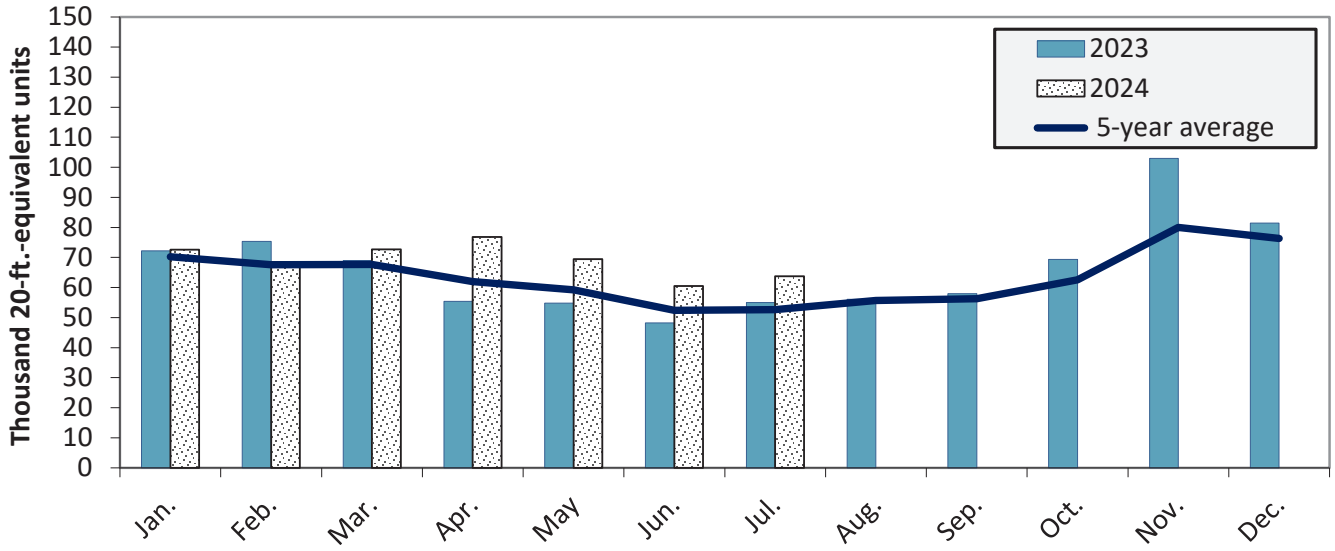
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined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

Figure 20. 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 21. 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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