



Grain Transportation Report

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Lack of Rain Leads to MRS Draft and Tow-Size Restrictions. Over the last few weeks, barge draft and sizes **have been reduced** along the Mississippi River System (MRS) because of a lack of rain. Last weekend, low water caused multiple barge tow groundings near Hickman, KY. Dredges continue to work various locations along the MRS to prevent further groundings and keep barges moving. The week ending October 19 marked only the second time since July that weekly grain movements were below the same week last year and below average ([Grain Transportation Report \(GTR\) table 10](#)).

Currently, tow sizes on the MRS are reduced as follows: from Cairo, IL, to Hickman, KY, down 14 to 46 percent (5 to 21 barges); from Hickman, KY to Greenville, MS, down 14 to 34 percent (5 to 16 barges); and from Greenville, MS, to the Gulf, down 9 to 17 percent (4 to 5 barges). Transit delays of 2 to 3 days can be expected because of reduced navigable space in certain areas of the MRS.

Over the next 2 weeks, the temperatures and precipitation predicted by the National Oceanic and Atmospheric Administration **will not suffice** to stabilize water levels. If the forecast proves accurate, then more draft and tow-size restrictions will follow.

Large Wheat Harvest Fuels Secondary Market for DETs. BNSF Railway's (BNSF) domestic efficiency trains (DETs) are a type of unit train for which grain is loaded at a single elevator, before sections of the train are split off, en route to multiple destinations.

DETs are typically used by wheat shippers because many flour mills prefer to receive smaller shipment lots. Like grain shuttle trains ([GTR](#)

[table 5](#)), DETs can be traded among shippers in the secondary market. For the week ending October 17, secondary market bids/offers for DETs to be delivered in October averaged \$1,500 (per car). These values are significantly higher than last year—when October DET placements averaged just \$100 per car.

High DET secondary values reflect both the large wheat harvest and BNSF's reduced number of DET offerings. According to USDA/National Agricultural Statistics Service's [Small Grains 2024 Summary](#) report, national wheat production totaled 1.97 billion bushels in 2024—11 percent above the prior 5-year average. North Dakota's 2024 wheat harvest (370 million bushels) was particularly strong—up 28 percent from average.

ADM Idles Iowa Soybean Crush Plant Amid Record Crop. Archer-Daniels-Midland Company (ADM) will idle its Des Moines, IA, soybean crush plant from mid-October through November for maintenance. According to [Reuters](#), the plant crushes about 5 million bushels of soybeans per month—about 12 percent of Iowa's total crush capacity.

ADM's announcement comes amid a record soybean crop in Iowa. According to USDA/National Agricultural Statistics Service's October [Crop Production report](#), Iowa farmers are set to harvest 638 million bushels (mbu) of soybeans—up 11 percent from last year and up 14 percent from the prior 5-year average. Comparing Iowa's grain supplies (i.e., September 1 grain stocks and estimated grain production) to the State's total storage capacity, Iowa is projected to have a storage deficit of 87 mbu. (For a national view on storage availability, see [GTR, October 3, 2024](#).)

The ADM plant's closure and the tight storage situation are likely to increase the number of Iowa-grown soybeans shipped by barge, to U.S. Gulf export terminals. For more on Mississippi River conditions, see the first highlight.

Grain Inspections at Highest Level Since 2021. For the week ending October 17, total grain inspections (corn, soybeans, and wheat) were the highest since January 2021 ([GTR fig. 16](#)). Totaling 3.7 million metric tons (mmt), grain inspections were up 32 percent from the previous week (week to week) and up 13 percent from the same week in marketing year (MY) 2023/24 (year to year). The week-to-week increases were driven by corn inspections (up 97 percent) and soybean inspections (up 28 percent).

Grain inspections destined to Mexico and Japan were the largest drivers of the year-to-year rise. Also, the ports of the Columbia River and Mississippi Gulf showed the largest year-to-year volume increases, with inspections up 0.19 mmt and 0.18 mmt, respectively. For the latest MY 2024/25 grain projections and analysis, see the October [World Agricultural Supply and Demand Estimates](#) report.

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 October 10, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 35.10 million metric tons (mmt), up 5 percent from last week and up 11 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 2.23 mmt, up 82 percent from last week. Net **soybean export sales** were 1.70 mmt, up 35 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.50 mmt, up 16 percent from last week.

Rail

U.S. Class I railroads originated 28,685 **grain carloads** during the week ending October 12. This was a 7-percent increase from the previous week, 4 percent more than last year, and 4 percent more than the 3-year average.

Average October **shuttle secondary railcar bids/offers** (per car) were \$1,300 above tariff for the week ending October 17. This was \$69 more than last week. Average non-shuttle secondary railcar bids/offers per car were \$650 above tariff. This was \$150 more than last week.

Average November shuttle secondary railcar bids/offers (per car) were \$1,110 above tariff for the week ending October 17. This was \$2 less than last week and \$1,319 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$380 above tariff. This was \$6 less than last week and \$305 more than this week last year.

Barge

For the week ending October 19, **barged grain movements** totaled 485,915 tons. This was 15 percent less than the previous week and 14 percent less than the same period last year.

For the week ending October 19, 343 grain barges **moved down river**—13 fewer than last week. There were 932 grain barges **unloaded** in the New Orleans region, 10 percent more than last week.

Ocean

For the week ending October 17, 37 **oceangoing grain vessels** were loaded in the Gulf—12 percent more than the same period last year. Within the next 10 days (starting October 18), 53 vessels were expected to be loaded—51 percent more than the same period last year.

As of October 17, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$54.25, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$30.00 per mt, down 1 percent from the previous week.

Fuel

For the week ending October 21, the U.S. average **diesel price** decreased 7.8 cents from the previous week to \$3.553 per gallon, 99.2 cents below the same week last year.



Grain Transportation Update: Demand Picks Up Amid High Grain Supplies

After a slow start in the first half of 2024 ([Grain Transportation Report \(GTR\), July 25, 2024](#)), rail shipments (to Pacific Northwest export terminals and Mexico) and barge shipments (to Mississippi Gulf export terminals) have been above average over the last several months—reflecting robust grain supplies and a strong export program. Ocean shipments from the U.S. Gulf have benefited from the Panama Canal’s suspension of drought-related restrictions, which had stymied grain exports for much of marketing year (MY) 2023/24. However, shippers are concerned that current poor rail service and low water conditions on the Mississippi River System (MRS) could throttle the high demand for grain transportation.

Grain Supplies and Large Harvest Likely To Boost Transportation Demand

After last year’s large harvest, U.S. farmers were slow to market grain because of falling grain prices. On June 1, on-farm grain stocks were the third-highest in the last 25 years. However, sales have picked up in the last several months, as farmers cleared their bins to make room for this year’s harvest. From June through August, grain “disappearance” was 17 percent above last year and 12 percent above the prior 3-year average.¹ Despite these increased sales, on-farm

grain stocks (as of September 1) were still above average. [Total grain stocks](#) (as of September 1) were about the same as the 5-year average.

Adding to the carryout (September 1 stocks), according to USDA/National Agricultural Statistics Service’s (NASS) October [Crop Production report](#), the United States is expected to harvest its second-largest-ever corn crop and an all-time record soybean crop this fall. These supplies are quickly funneling into storage and distribution channels. According to USDA/NASS’s latest [Crop Progress report](#), for the week ending October 20, farmers were ahead of schedule: 65 percent complete with the corn harvest (13 percentage points above the 5-year average) and 81 percent complete with the soybean harvest (14 percentage points above average).

High stocks and a record harvest will result in [less storage availability this fall](#)—adding pressure to ship more grain in the near term. Storage availability is projected to be below average in River States (Illinois, Indiana, Iowa, Missouri, and Ohio) and rail-dependent States (South Dakota, North Dakota, and Nebraska). (For more information, see [GTR, October 3, 2024](#).)

Rail Update: Carloads Rise in Third Quarter as Railroads Struggle With Exports to Mexico

Through the first three quarters of 2024, rail grain carloads were down slightly (2 percent) from the 3-year average. However, in the third quarter—typically, the nadir for grain shipments—carloads were up 13 percent from average ([GTR fig. 3](#)).

One area of growth has been rail exports to Mexico. Through the first three quarters of 2024, inspections of grain destined to Mexico (by rail) totaled 14.5 million metric tons (mmt)—up 39 percent from the prior 5-year average. Despite this growth, shippers are concerned with rail service for Mexican shipments.

For about a year, Ferromex—the Mexican railroad that interchanges with BNSF Railway (BNSF) and Union Pacific Railroad (UP)—has struggled to meet the demand for cross-border grain shipments, and Ferromex currently has permit embargoes in place for the [Eagle Pass, TX](#) and [El Paso, TX](#) border crossings. For much of September, both BNSF and UP stopped permitting grain shuttle trains to Mexico to prevent empty grain cars from being stuck there. UP suspended permitting a second time from October 12 to October 21 ([GTR, October 17, 2024, first highlight](#)).

¹ “Disappearance” refers to the drawdown in National grain supplies from June 1 (June 1 grain stocks plus new production of wheat, barley, and oats) to September 1.

Owing to BNSF's reduced number of grain shuttle trains (from 155 to 140), the large grain harvests this year, and ongoing rail service challenges (specifically relating to Mexico)—secondary market shuttle values are the highest since October 2022. Over the summer, October secondary shuttle values averaged around \$800 (per car). From late-August to late-September, values increased by nearly \$1,000, reaching an average value of \$1,775 (per car) for the week ending September 26 ([GTR fig. 5](#)). Shuttle values in November and December are lower, but still historically high ([GTR fig. 6](#) and [fig. 7](#)).

Weekly rail service metrics from the Surface Transportation Board (available on [AgTransport](#)) show challenges for Canadian Pacific Kansas City (CPKC) in recent weeks.² For the 4 weeks ending October 12, grain unit train origin dwell times on the KCS network averaged 46 hours—up from 15 hours the same time last year ([GTR table 4a](#)). CPKC is also struggling to fill manifest grain car orders (primarily, for wheat shipments originating in North Dakota). For the 4 weeks ending October 12, CP averaged 827 unfilled grain car orders—up from 458 the same time last year ([GTR table 4b](#)).

Barge Update: Volumes and Spot Rates Minimally Affected by Extreme Weather

Since early summer, barged grain movements have been challenged by severe weather, including floods, drought, and hurricanes. In

late June, severe storms in the Upper Midwest caused flooding on the Upper Mississippi River that closed several locks along the river's upper and mid sections until late July.

In mid-August, as drought lowered water levels, draft and tow restrictions were placed on barges in the Lower Mississippi River, and similar restrictions soon followed on the Mid-Mississippi River. Low water conditions continued until mid-September, when rainfall from several tropical systems allowed draft and tow sizes to return to normal. Most recently, a lack of consistent precipitation has again made draft and tow restrictions necessary along the MRS.

Year to date, 21.5 million tons of grain ([GTR table 10](#)) have moved through MRS locks—21 percent less than the 5-year average, but 10 percent more than last year. From August to mid-September, weekly barged grain movements were 179 percent above the same time last year, when low water restrictions and low export sales hindered barge movements. Increased export sales ([GTR table 14](#)), especially of corn, have led to the increase in barged grain movements.

Spot rates tend to trend up in August as barge demand increases with the start of harvest. From mid-August to mid-September, St. Louis weekly spot rates surpassed the average and same time last year because of increased demand. For the week ending September 17, the spot rate at St. Louis peaked at \$32.36 per

ton ([GTR table 9](#))—38 percent lower than last year's peak and 14 percent lower than the average peak. Much of this decrease owes to having lighter low water restrictions this year than in the previous 2 years. In recent weeks, St. Louis spot rates have been below average. However, rates have started to rise because of a lack of precipitation and increased restrictions. ([See first highlight](#).)

Ocean Update: Vessel Routes Normalize and Dry Bulk Freight Rates Fall

In recent weeks, rising exports have increased the demand for bulk ocean shipments from U.S. Gulf export terminals. In September, an average of 28 oceangoing grain vessels per week were loaded in the U.S. Gulf, up from an average of 22 vessels per week in August and up from an average of 24 vessels per week in September 2023 ([GTR fig. 18](#)).

Between mid-2023 to mid-2024, grain vessels leaving the U.S. Gulf for East Asia (i.e., China, Japan, Korea, and the Philippines) were diverted from the Panama Canal because of drought-related restrictions. However, by Summer 2024—following much needed rain—the Panama Canal Authority (PCA) eased its restrictions, returning vessel transits to near-normal levels. By July, a majority of U.S. Gulf-to-East Asia-bound grain vessels used the Panama Canal, rather than navigating around the Cape of Good Hope, as they had done earlier in the year ([GTR, August 15, 2024](#)).

² CPKC's service metrics are reported for the two legacy networks that precede CPKC—Canadian Pacific Railway (CP) and Kansas City Southern Railway (KCS).

This trend has continued: of grain vessels departing the U.S. Gulf for East Asia—in August, 8 went via the Cape of Good Hope and 14, via the Panama Canal. In September, 7 went via the Cape of Good Hope and 17, via the Panama Canal. Although the PCA has raised the number of daily transit slots to historically normal levels, some grain vessels continue to avoid the Panama Canal because of inconvenient changes to the PCA's booking system (e.g., advanced booking and reservation fees).

Dry bulk freight rates have fallen in the third quarter because of an oversupply of vessels ([GTR fig. 19](#)). For the week ending October 17, the freight rate to Japan was \$54.25 per metric ton (mt) through the U.S. Gulf (down 5 percent from the same period last year) and \$30.00 per mt through the PNW (up 1 percent from last year).

Trucking Update: Diesel Prices Fall in Third Quarter

As in the second quarter, the U.S. average diesel price dropped for much of third quarter 2024 ([GTR fig. 15](#)). For 10 consecutive weeks—from the week ending July 15 to the week ending September 16—the U.S. average diesel fuel price dropped a total of 33.9 cents per gallon. Third-quarter 2024 U.S. diesel prices averaged \$3.69 per gallon, which was 17 cents below second quarter 2024 and 55 cents below third quarter 2023. In the last 4 weeks (from the week ending September 23 to October 17), diesel prices have increased 10.5 cents, driven

by rising agricultural transportation demand, compressed refinery maintenance cycles, Hurricanes Helene and Milton, and conflict in the Middle East. In the most recent week ending October 23, diesel prices dropped 7.8 cents, the biggest drop since December 18.

The Energy Information Administration's October [Short-Term Energy Outlook](#) projects the fourth-quarter average diesel price at \$3.54 per gallon, down 15 cents from the previous quarter. U.S. diesel prices are projected to average \$3.76 per gallon in 2024, down 46 cents from 2023's average price of \$4.22 per gallon.

According to Bulkloads' [Quick Market Update](#) report, spot rates for trucking grain spiked three times in 2024—in January, June, and beginning in late September. The current harvest fueled the most recent increase by raising the demand for short-haul trucking. From the week ending September 26 to the week ending October 3, grain spot rates rose 25 percent, to a little over \$6 per mile—but fell to \$5.25 per mile for the week ending October 17.

MY 2024/25 Export Projections: Rise Expected for Three Major Grains

According to USDA's October [World Agricultural Supply and Demand Estimates \(WASDE\)](#), total U.S. disappearance (domestic use, plus exports) of the three major grains is expected to total 21.4 billion bushels in MY 2024/25, up 2 percent from MY 2023/24. If disappearance rises as predicted, it will lift

transportation demand. From MY 2023/24 to MY 2024/25, total grain exports are projected to rise 7 percent, with higher exports of all three grains. Likewise, domestic use is expected to increase 1 percent, mainly because of higher soybean and wheat consumption.

U.S. corn exports for MY 2024/25 were revised up 0.64 mmt from the September WASDE projection, mainly because of increased exports to Mexico, which now account for 42 percent of total year-to-date U.S. corn exports. Robust exports to Mexico are expected to offset the reduction in sales to China. As of October 10, unshipped corn exports, which represent future transportation demand, are 22 percent above the same time last year ([GTR table 15](#)).

U.S. soybean exports are projected to be 9 percent higher than MY 2023/24 because of higher production. As of October 10, unshipped soybean exports are 7 percent ahead of the same time last year. Unshipped exports to China (which account for 31 percent of total U.S. soybean exports to date) are up 3 percent from the same time last year ([GTR table 16](#)).

For MY 2024/25, U.S. wheat exports are projected to increase 17 percent, reaching their highest level in 4 years, mainly because of strong growth in exports of hard red winter wheat from last year. As of October 10, unshipped wheat exports are 9 percent behind the same time in MY 2023 ([GTR table 17](#)).

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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.

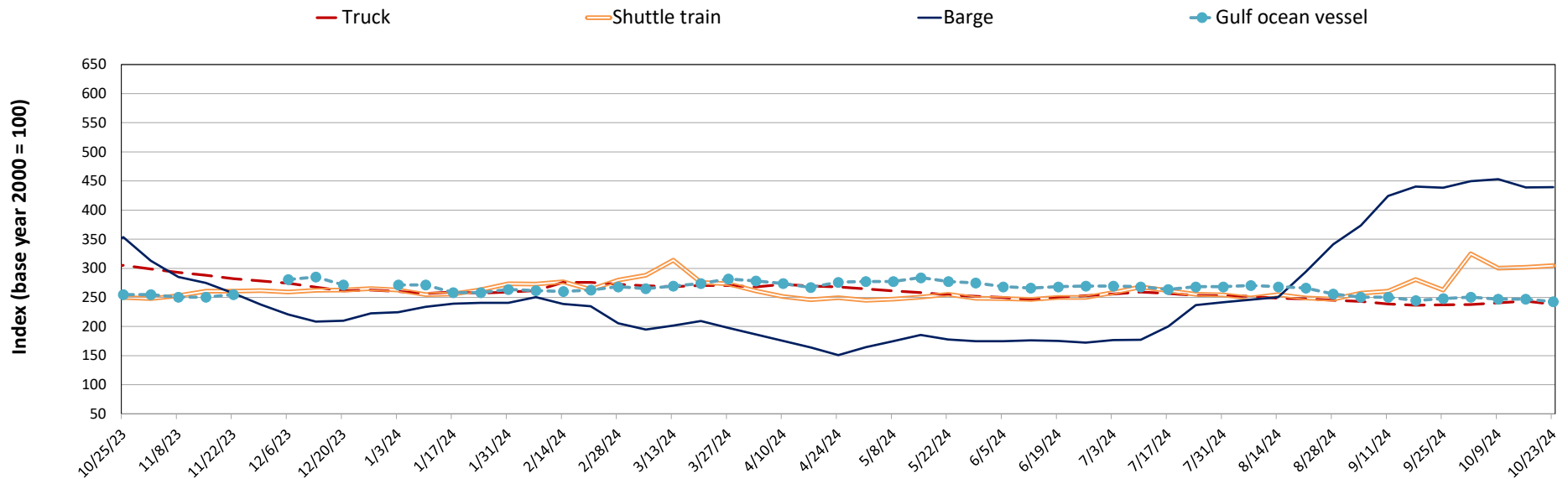
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
10/23/24	238	364	305	439	243	213
10/16/24	244	356	302	439	247	215
10/25/23	305	332	250	353	255	211

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.

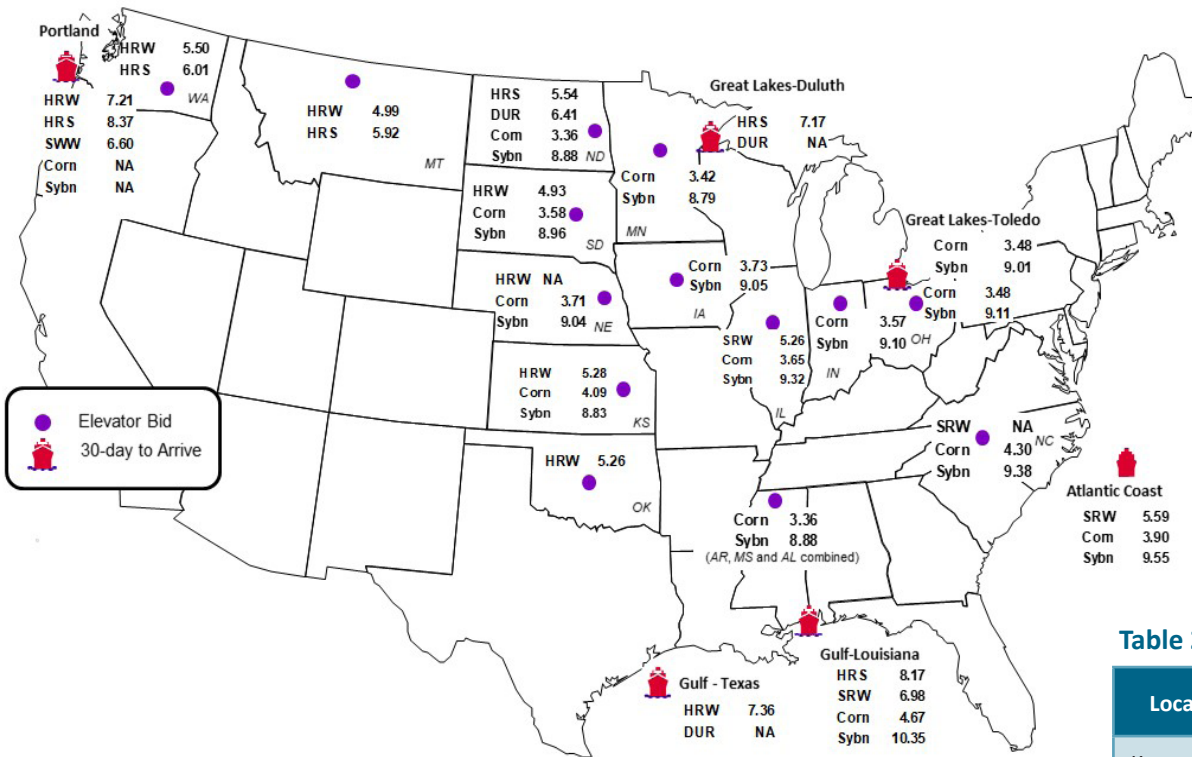
Figure 1. Grain transportation cost indicators as of week ending 10/23/24



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	10/18/2024	10/11/2024
Corn	IL-Gulf	-1.02	-1.03
Corn	NE-Gulf	-0.96	-0.96
Soybean	IA-Gulf	-1.30	-1.30
HRW	KS-Gulf	-2.08	-1.43
HRS	ND-Portland	-2.83	-1.29

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	10/18/2024	Week ago 10/11/2024	Year ago 10/20/2023
Kansas City	Wheat	Dec	5.864	6.002	6.740
Minneapolis	Wheat	Dec	6.164	6.436	7.306
Chicago	Wheat	Dec	5.772	5.966	5.884
Chicago	Corn	Dec	4.052	4.106	4.942
Chicago	Soybean	Nov	9.862	10.022	13.102

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.

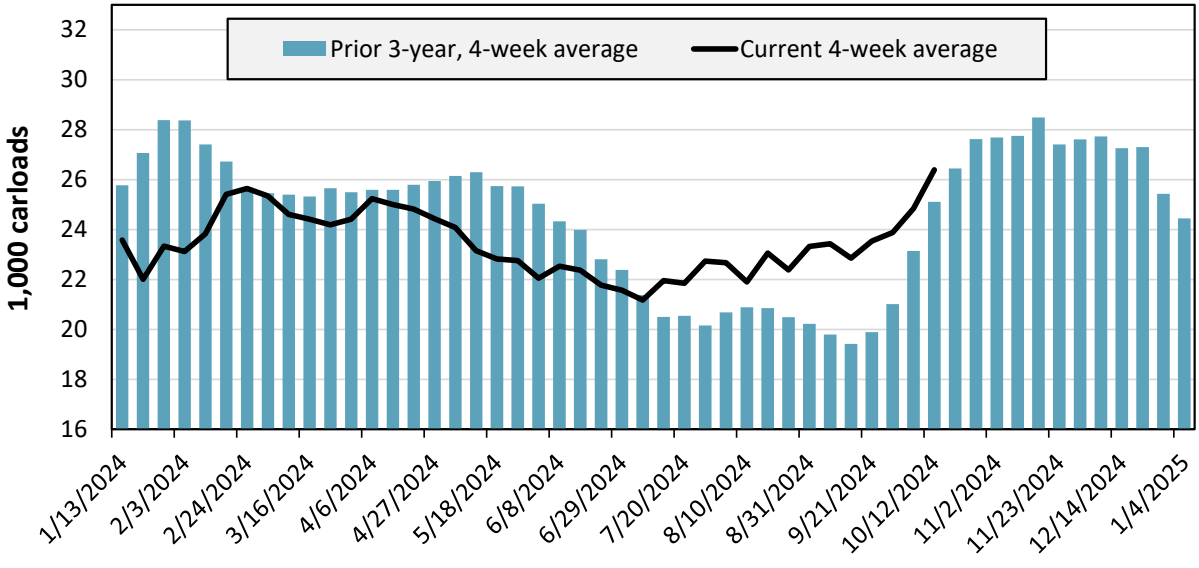
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 10/12/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,848	3,224	12,763	5,688	3,654	1,508	28,685
This week last year	2,188	2,165	11,510	6,313	3,853	1,635	27,664
2024 YTD	67,839	109,152	431,833	210,138	110,564	40,366	969,892
2023 YTD	70,095	101,028	362,839	212,812	96,808	51,073	894,655
2024 YTD as % of 2023 YTD	97	108	119	99	114	79	108
Last 4 weeks as % of 2023	102	133	112	90	99	112	106
Last 4 weeks as % of 3-yr. avg.	113	130	106	88	104	131	105
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 October 12, grain carloads were up 6 percent from the previous week, up 6 percent from last year, and up 5 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: 10/12/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	40.2	24.9	13.6	17.7	9.1	23.0	31.4	22.8
	Average over last 4 weeks	34.9	37.4	10.2	17.2	8.4	21.5	45.7	25.0
	Average of same 4 weeks last year	26.0	42.5	9.2	13.4	10.8	33.4	14.6	21.4
Grain unit train speeds (miles per hour)	This week	20.9	19.4	24.3	21.6	25.3	18.7	22.5	21.8
	Average over last 4 weeks	22.2	18.6	24.6	22.1	24.1	20.2	22.6	22.0
	Average of same 4 weeks last year	23.9	15.4	24.9	23.4	24.2	21.0	24.8	22.5

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

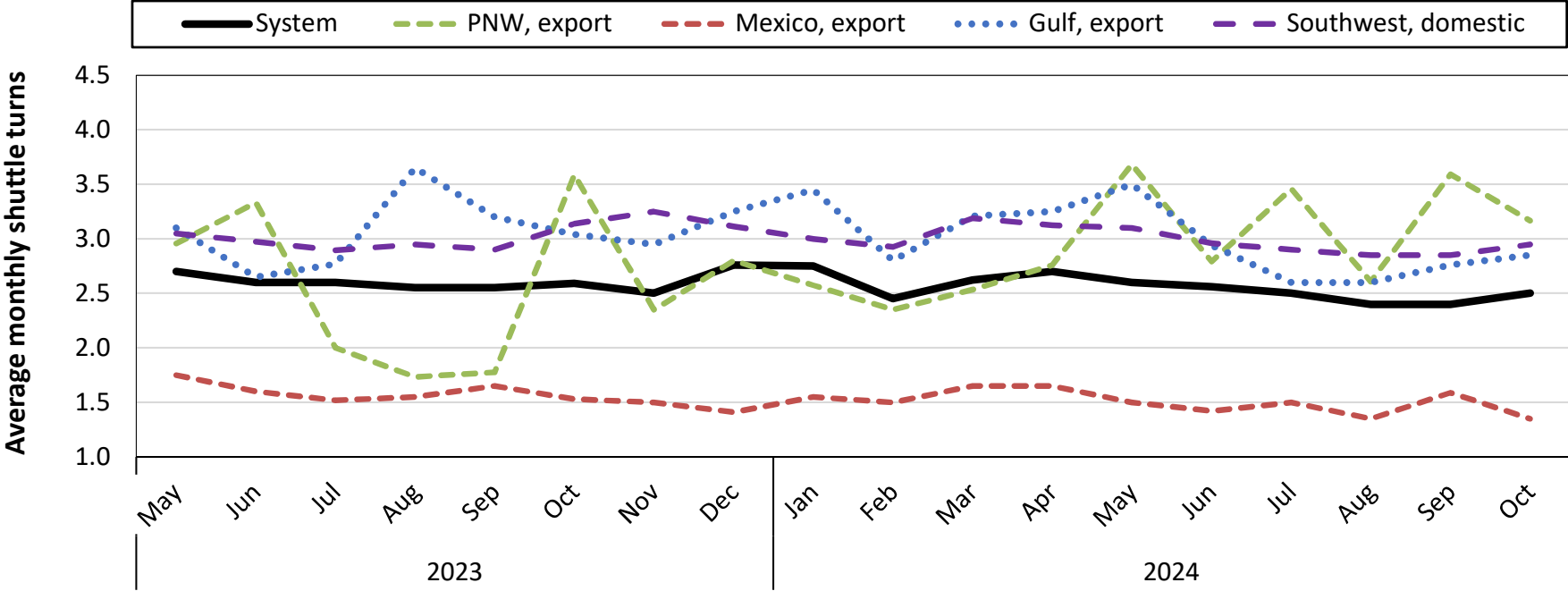
For the week ending: 10/12/2024		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Empty grain cars not moved in over 48 hours (number)	This week	26	5	406	120	9	51	27	644
	Average over last 4 weeks	44	8	406	111	6	61	83	718
	Average of same 4 weeks last year	12	13	399	76	3	74	22	598
Loaded grain cars not moved in over 48 hours (number)	This week	65	110	328	159	3	33	16	714
	Average over last 4 weeks	68	183	386	176	5	92	43	952
	Average of same 4 weeks last year	22	292	316	101	5	270	2	1,008
Grain unit trains held (number)	This week	0	0	14	7	0	4	3	28
	Average over last 4 weeks	0	0	10	10	0	4	3	27
	Average of same 4 weeks last year	0	4	11	6	0	4	7	32
Unfilled grain car orders (number)	This week	13	0	1,100	236	0	1,021	105	2,475
	Average over last 4 weeks	8	4	1,081	399	0	827	249	2,567
	Average of same 4 weeks last year	0	20	1,338	209	0	458	30	2,055

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

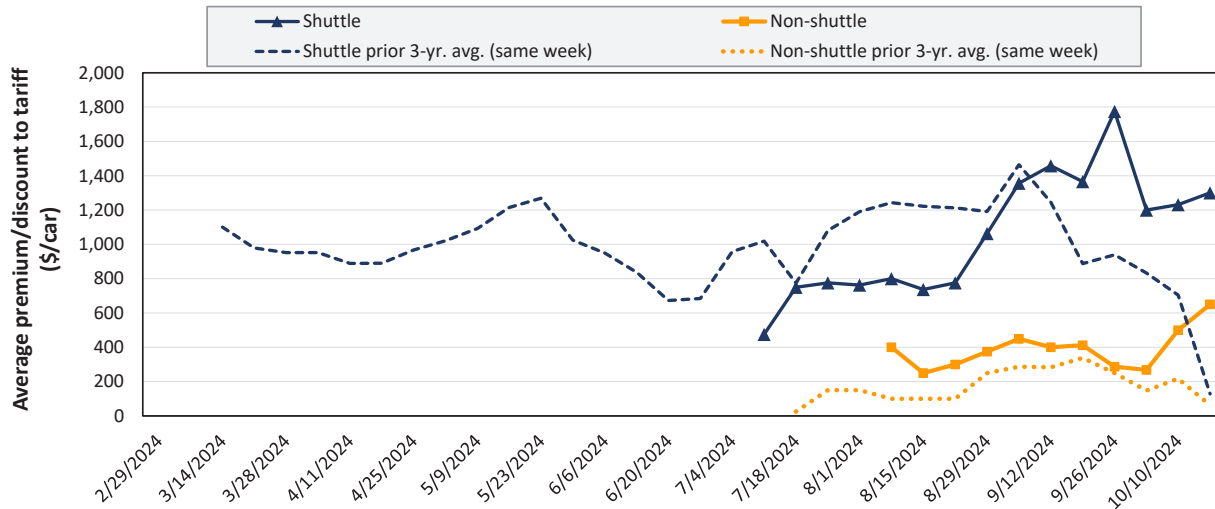


Average monthly system-wide grain shuttle turns reported in the first week of October 2024 were 2.5. By destination region, average monthly grain shuttle turns were 3.17 to PNW, 1.35 to Mexico, 2.85 to the Gulf, and 2.95 to the Southwest.

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



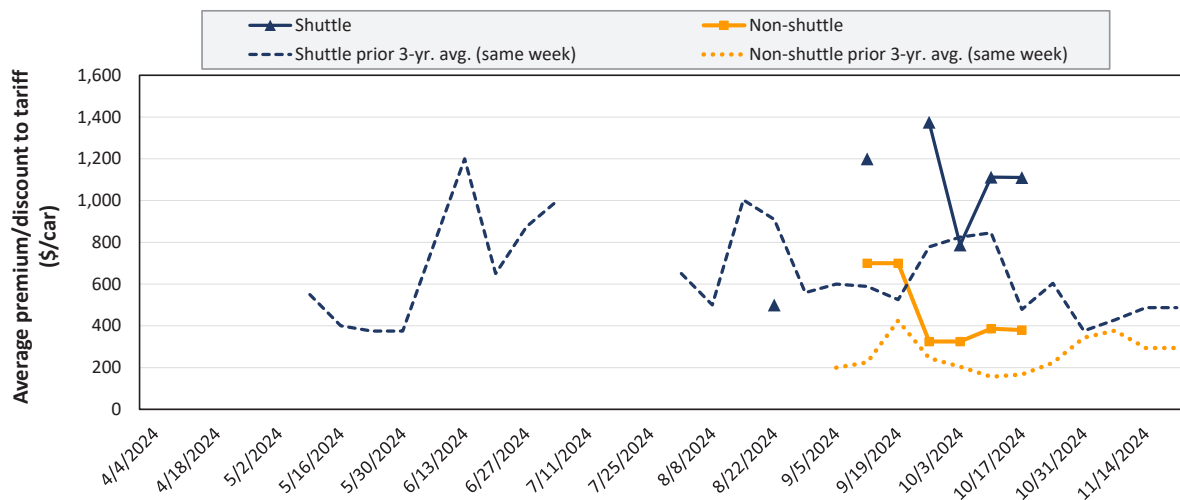
Average non-shuttle bids/offers rose \$150 this week, and are at the peak.

Average shuttle bids/offers rose \$69 this week and are \$475 below the peak.

10/17/2024	BNSF	UP
Non-Shuttle	\$650	n/a
Shuttle	\$1,750	\$850

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



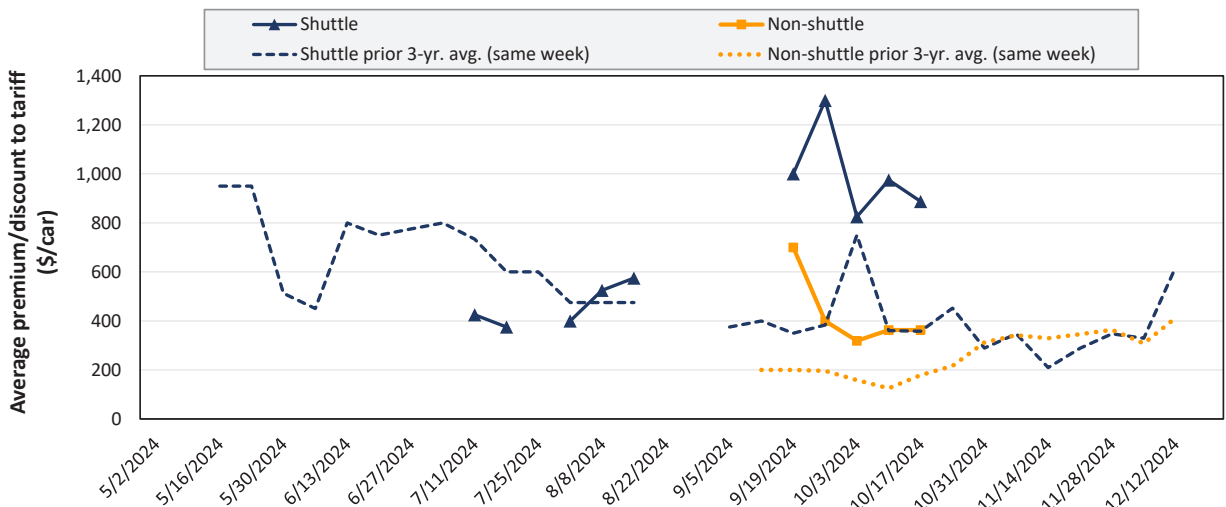
Average non-shuttle bids/offers fell \$6 this week, and are \$320 below the peak.

Average shuttle bids/offers fell \$2 this week and are \$265 below the peak.

10/17/2024	BNSF	UP
Non-Shuttle	\$517	\$244
Shuttle	\$1,508	\$713

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 are unchanged this week, and are \$338 below the peak.

Average shuttle bids/offers fell \$88 this week and are \$413 below the peak.

10/17/2024	BNSF	UP
Non-Shuttle	\$475	\$250
Shuttle	\$1,275	\$500

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: 10/17/2024		Delivery period					
		Oct-24	Nov-24	Dec-24	Jan-25	Feb-25	Mar-25
Non-shuttle	BNSF	650	517	475	n/a	n/a	n/a
	Change from last week	150	13	0	n/a	n/a	n/a
	Change from same week 2023	n/a	442	375	n/a	n/a	n/a
	UP	n/a	244	250	n/a	n/a	n/a
	Change from last week	n/a	-25	0	n/a	n/a	n/a
	Change from same week 2023	n/a	n/a	125	n/a	n/a	n/a
Shuttle	BNSF	1,750	1,508	1,275	1,250	n/a	n/a
	Change from last week	287	333	300	150	n/a	n/a
	Change from same week 2023	n/a	1,625	1,475	n/a	n/a	n/a
	UP	850	713	500	n/a	n/a	n/a
	Change from last week	-150	-338	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	1,013	700	n/a	n/a	n/a
	CPKC	1,200	550	500	n/a	n/a	n/a
	Change from last week	200	0	0	n/a	n/a	n/a
Change from same week 2023	n/a	350	300	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.

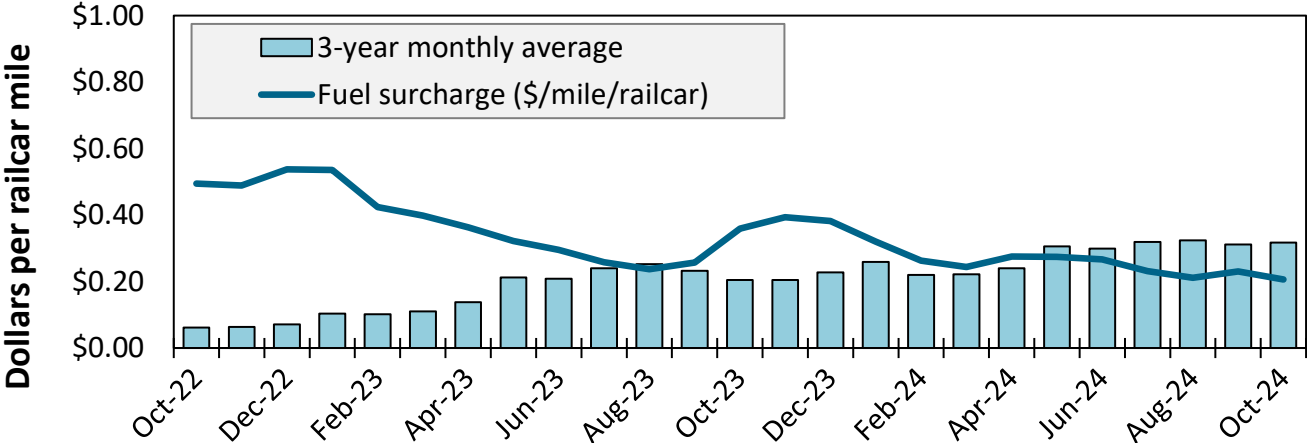
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

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

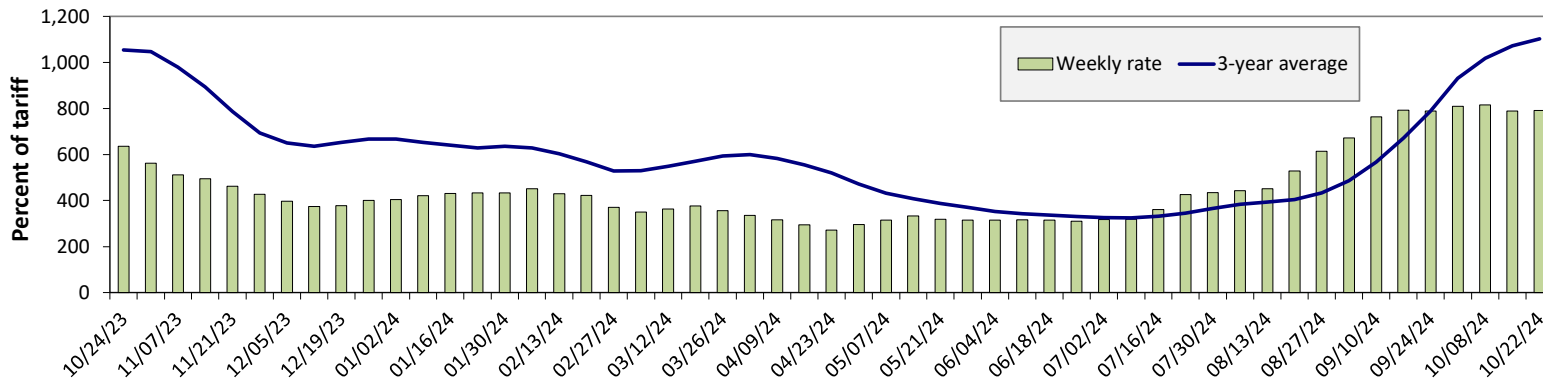
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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 domestic 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.

Figure 9. Illinois River barge freight rate



For the week ending October 22: there is no change from the previous week; 24 percent higher than last year; and 28 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	10/22/2024	730	763	791	754	740	543
	10/15/2024	750	770	790	683	755	579
\$/ton	10/22/2024	45.19	40.59	36.70	30.08	34.71	17.05
	10/15/2024	46.43	40.96	36.66	27.25	35.41	18.18
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	40	31	24	30	4	4
	3-year avg.	-22	-30	-28	-37	-41	-55
Rate	November	653	612	604	538	565	448
	January	n/a	n/a	529	409	422	361

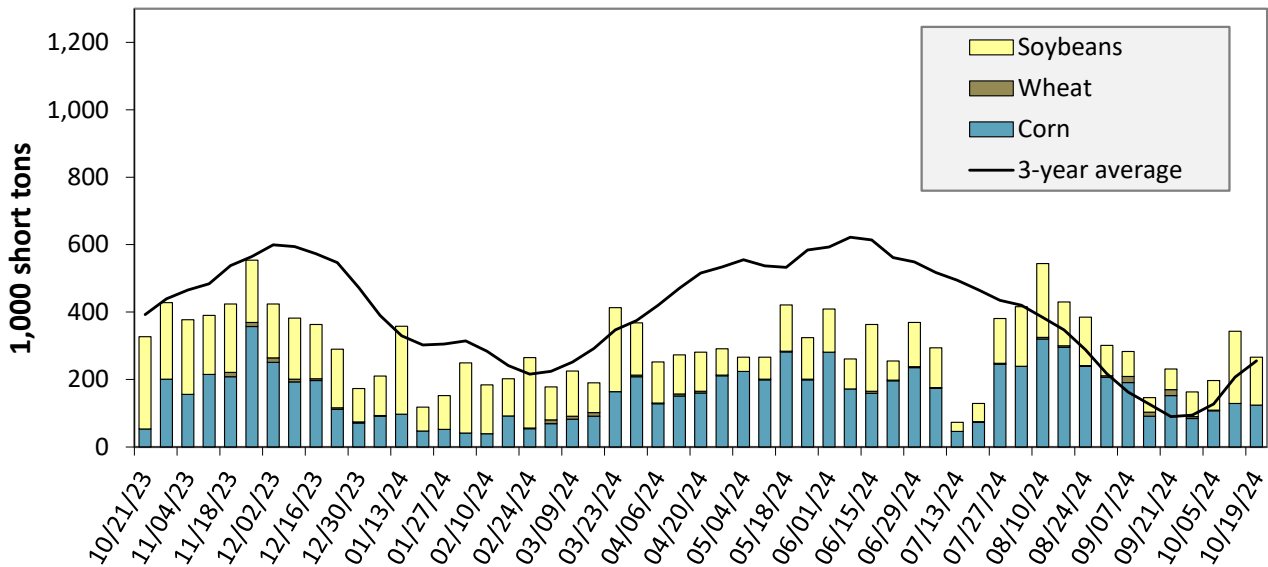
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of \$6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi 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 19: 19 percent lower than last year and 4 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.

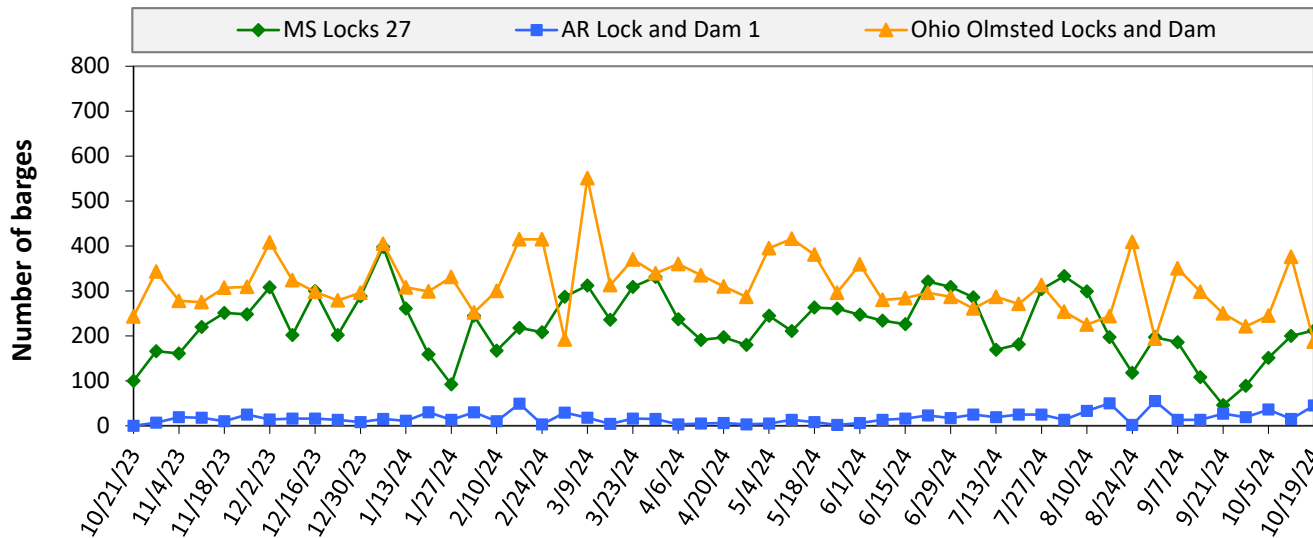
Table 10. Barged grain movements (1,000 tons)

For the week ending 10/19/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	17	0	89	0	106
Mississippi River (Winfield, MO (L25))	69	0	77	0	146
Mississippi River (Alton, IL (L26))	120	0	122	0	242
Mississippi River (Granite City, IL (L27))	124	0	142	0	266
Illinois River (La Grange)	5	0	51	0	56
Ohio River (Olmsted)	96	0	104	0	200
Arkansas River (L1)	0	7	13	0	20
Weekly total - 2024	220	7	259	0	486
Weekly total - 2023	151	13	399	0	562
2024 YTD	11,702	1,407	8,229	178	21,516
2023 YTD	9,586	1,165	8,549	205	19,505
2024 as % of 2023 YTD	122	121	96	87	110
Last 4 weeks as % of 2023	131	145	80	240	100
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.

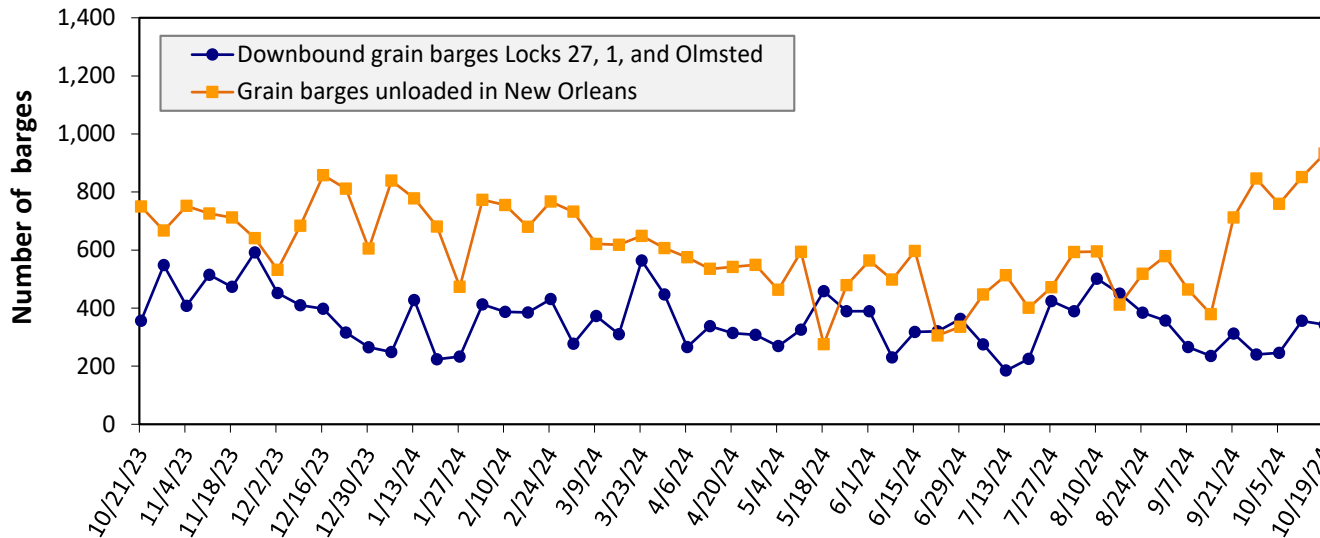
Figure 12. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending October 19: 444 barges transited the locks, 147 barges fewer than the previous week, and 27 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 19: 343 barges moved down river, 13 fewer than the previous week; 932 grain barges unloaded in the New Orleans Region, 10 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.

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.

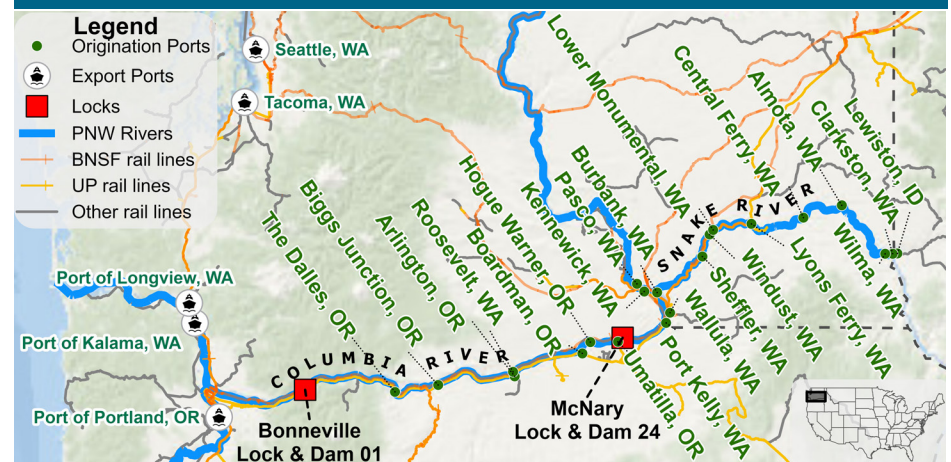
Table 12. Monthly barged grain movements Columbia-Snake (1,000 tons)

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. Totals may not add up because of 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.

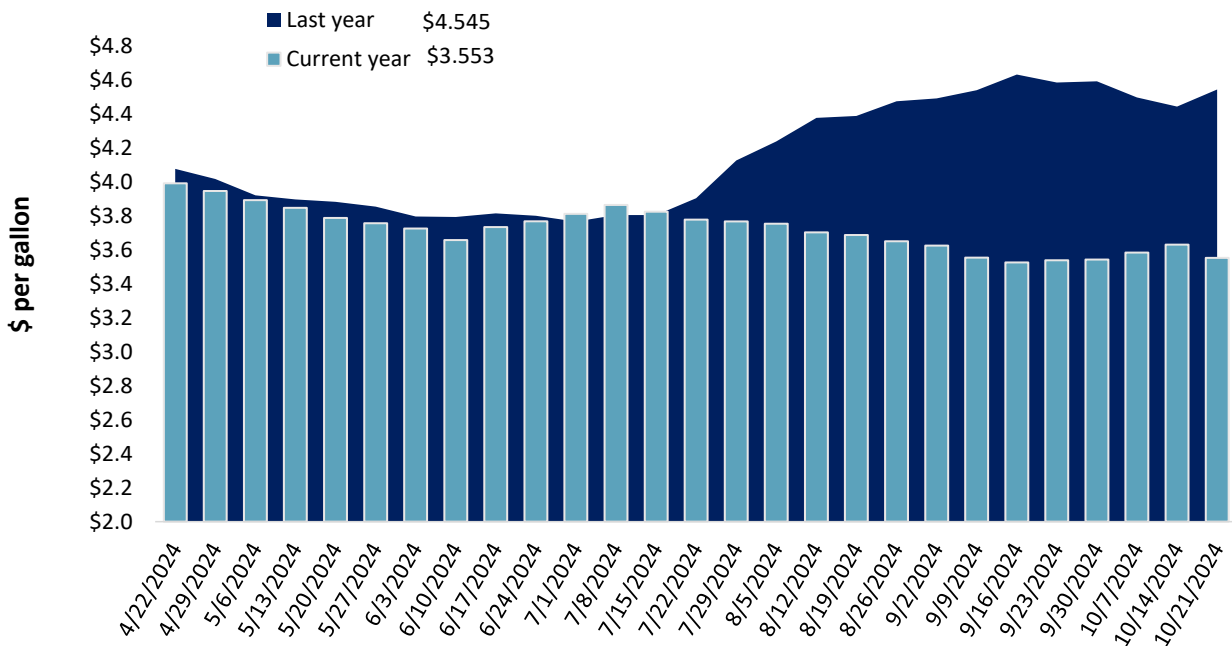
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 10/21/2024 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.590	0.004	-0.818
	New England	3.760	-0.006	-0.791
	Central Atlantic	3.816	-0.045	-0.852
	Lower Atlantic	3.489	0.025	-0.810
II	Midwest	3.543	-0.108	-1.011
III	Gulf Coast	3.199	-0.138	-0.987
IV	Rocky Mountain	3.636	0.001	-1.118
V	West Coast	4.210	-0.064	-1.258
	West Coast less California	3.785	-0.089	-1.203
	California	4.698	-0.036	-1.318
Total	United States	3.553	-0.078	-0.992

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 21, the U.S. average diesel fuel price decreased 7.8 cents from the previous week to \$3.553 per gallon, 99.2 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 10/10/2024	815	598	1,267	999	96	3,774	14,908	16,417	35,099
	This week year ago	647	1,024	1,324	1,000	140	4,136	12,176	15,394	31,706
	Last 4 wks. as % of same period 2023/24	133	57	91	95	52	89	110	108	106
Current shipped (cumulative) exports sales	2024/25 YTD	2,060	1,385	2,887	2,306	141	8,779	4,967	5,424	19,170
	2023/24 YTD	1,203	1,576	2,329	1,338	141	6,588	4,000	5,402	15,990
	YTD 2024/25 as % of 2023/24	171	88	124	172	100	133	124	100	120
	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 15. Top 5 importers of U.S. corn

For the week ending 10/10/2024	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	8,278	8,319	-0	17,746
Japan	2,546	1,718	48	9,366
China	6	929	-99	8,233
Colombia	1,851	1,117	66	4,383
Korea	144	76	90	1,565
Top 5 importers	12,825	12,159	5	41,293
Total U.S. corn export sales	19,876	16,176	23	51,170
% of YTD current month's export projection	34%	28%	-	-
Change from prior week	2,226	881	-	-
Top 5 importers' share of U.S. corn export sales	65%	75%	-	81%
USDA forecast October 2024	59,058	58,220	1	-
Corn use for ethanol USDA forecast, October 2024	138,430	138,964	-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 16. Top 5 importers of U.S. soybeans

For the week ending 10/10/2024	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	9,121	9,878	-8	28,636
Mexico	1,605	2,172	-26	4,917
Japan	585	758	-23	2,231
Egypt	701	130	441	2,228
Indonesia	538	380	42	1,910
Top 5 importers	12,552	13,318	-6	39,922
Total U.S. soybean export sales	21,841	20,796	5	51,302
% of YTD current month's export projection	43%	45%	-	-
Change from prior week	1,703	1,372	-	-
Top 5 importers' share of U.S. soybean export sales	57%	64%	-	78%
USDA forecast, October 2024	50,349	46,130	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 17. Top 10 importers of all U.S. wheat

For the week ending 10/10/2024	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	2,132	1,741	22	3,298
Philippines	1,675	1,642	2	2,494
Japan	1,205	1,097	10	2,125
China	139	748	-81	1,374
Korea	1,120	726	54	1,274
Taiwan	564	653	-14	921
Nigeria	285	189	51	920
Thailand	470	224	110	552
Colombia	259	180	44	522
Vietnam	271	247	10	313
Top 10 importers	8,118	7,446	9	13,792
Total U.S. wheat export sales	12,553	10,723	17	18,323
% of YTD current month's export projection	56%	56%	-	-
Change from prior week	504	633	-	-
Top 10 importers' share of U.S. wheat export sales	65%	69%	-	75%
USDA forecast, October 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 18. Grain inspections for export by U.S. port region (1,000 metric tons)

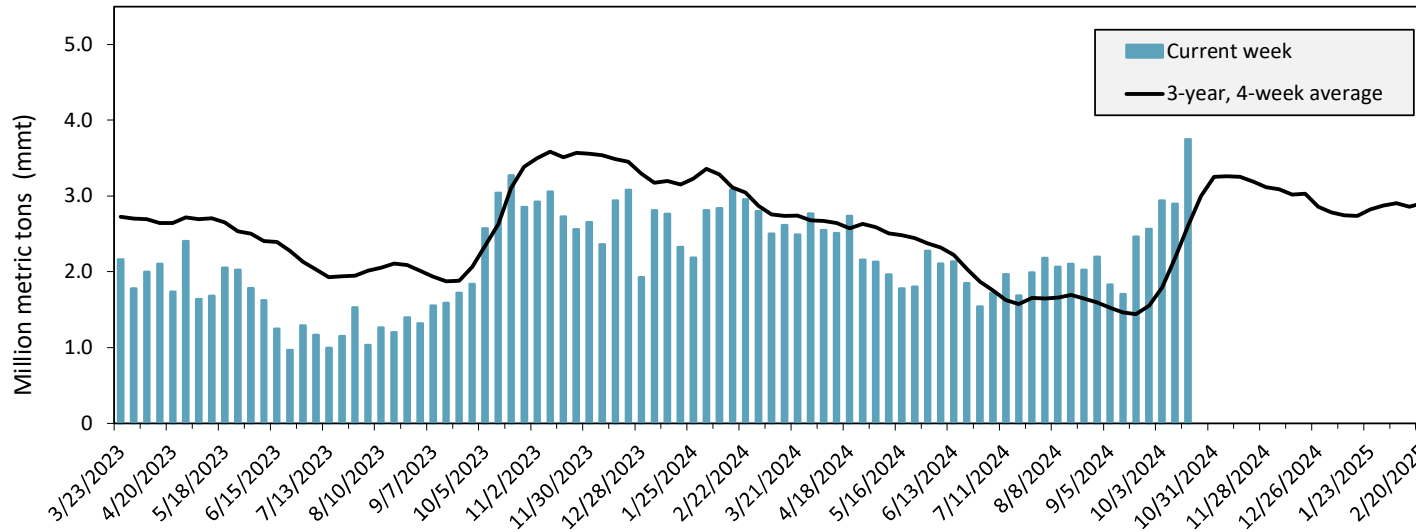
Port regions	Commodity	For the week ending 10/17/2024	Previous week*	Current week as % of previous	2024 YTD*	2023 YTD*	2024 YTD as % of 2023 YTD	Last 4-weeks as % of:		2023 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	7	8	91	12,091	3,983	304	n/a	3690	5,267
	Soybeans	947	678	140	4,771	5,372	89	101	92	10,286
	Wheat	164	176	93	9,662	7,955	121	149	127	9,814
	All Grain	1,118	862	130	27,609	17,505	158	127	114	25,913
Mississippi Gulf	Corn	733	276	265	21,976	19,707	112	144	121	23,630
	Soybeans	952	1,003	95	17,719	18,624	95	111	127	26,878
	Wheat	60	101	59	4,081	2,958	138	92	92	3,335
	All Grain	1,745	1,381	126	43,894	41,289	106	120	122	53,843
Texas Gulf	Corn	8	8	102	474	268	177	216	276	397
	Soybeans	159	0	n/a	159	156	102	151	95	267
	Wheat	0	30	0	1,452	1,486	98	20	10	1,593
	All Grain	212	115	184	5,138	4,283	120	116	92	5,971
Interior	Corn	194	214	91	10,868	7,726	141	92	101	10,474
	Soybeans	256	193	132	5,801	4,571	127	100	121	6,508
	Wheat	25	53	47	2,435	1,875	130	211	141	2,281
	All Grain	477	486	98	19,313	14,313	135	101	112	19,467
Great Lakes	Corn	21	0	n/a	21	23	89	n/a	872	57
	Soybeans	62	0	n/a	80	85	94	265	76	192
	Wheat	20	19	103	468	323	145	75	128	581
	All Grain	103	19	528	569	431	132	123	111	831
Atlantic	Corn	37	1	n/a	327	107	305	440	349	166
	Soybeans	5	33	16	480	1,318	36	31	31	2,058
	Wheat	0	0	n/a	66	99	67	n/a	n/a	101
	All Grain	42	34	126	872	1,525	57	89	81	2,325
All Regions	Corn	1,000	507	197	45,756	31,827	144	145	133	40,004
	Soybeans	2,434	1,907	128	29,193	30,230	97	108	112	46,459
	Wheat	268	380	71	18,164	14,728	123	115	97	17,738
	All Grain	3,749	2,897	129	97,578	79,496	123	119	117	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.

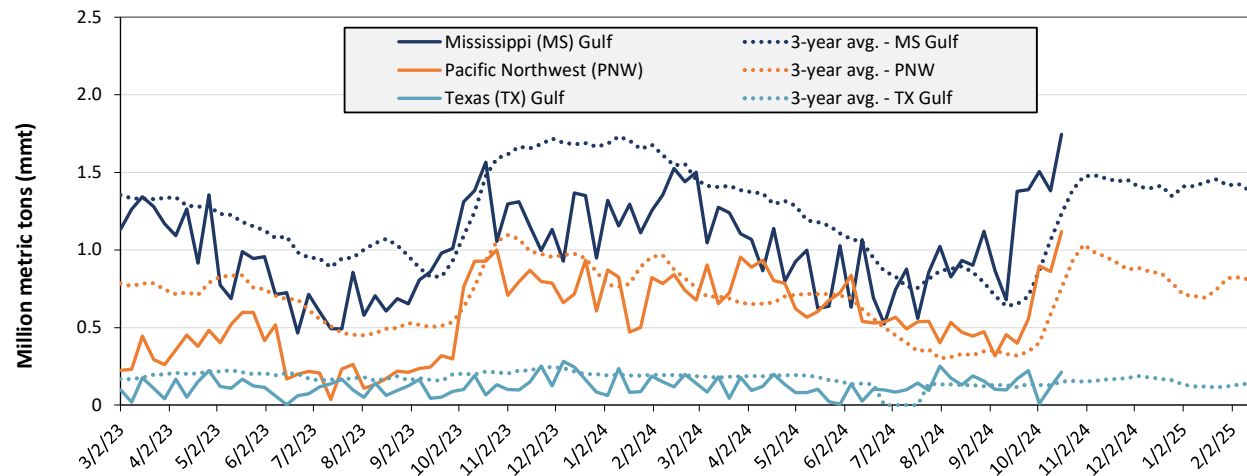
Figure 16. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Oct. 17: 3.7 mmt of grain inspected, up 29 percent from the previous week, up 29 percent from the same week last year, and up 44 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 17. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 10/17/24 inspections (mmt):				
MS Gulf: 1.75				
PNW: 1.12				
TX Gulf: 0.21				
Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 26	up 84	up 31	up 30
Last year (same 7 days)	up 40	up 67	up 42	up 14
3-year average (4-week moving average)	up 41	up 40	up 41	up 48

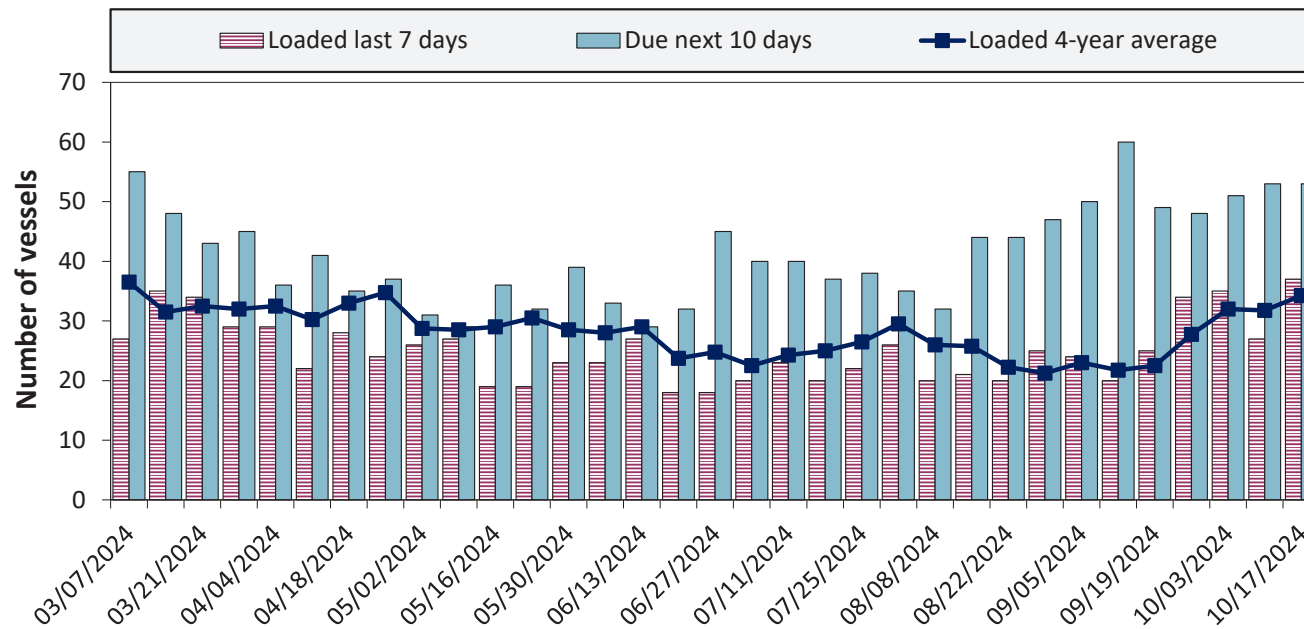
Source: USDA, Federal Grain Inspection Service.

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
10/17/2024	37	37	53	14
10/10/2024	38	27	53	13
2023 range	(8...38)	(17...34)	(21...56)	(1...24)
2023 average	22	26	39	10

Note: The data are voluntarily submitted and may not be complete.
 Source: USDA, Agricultural Marketing Service.

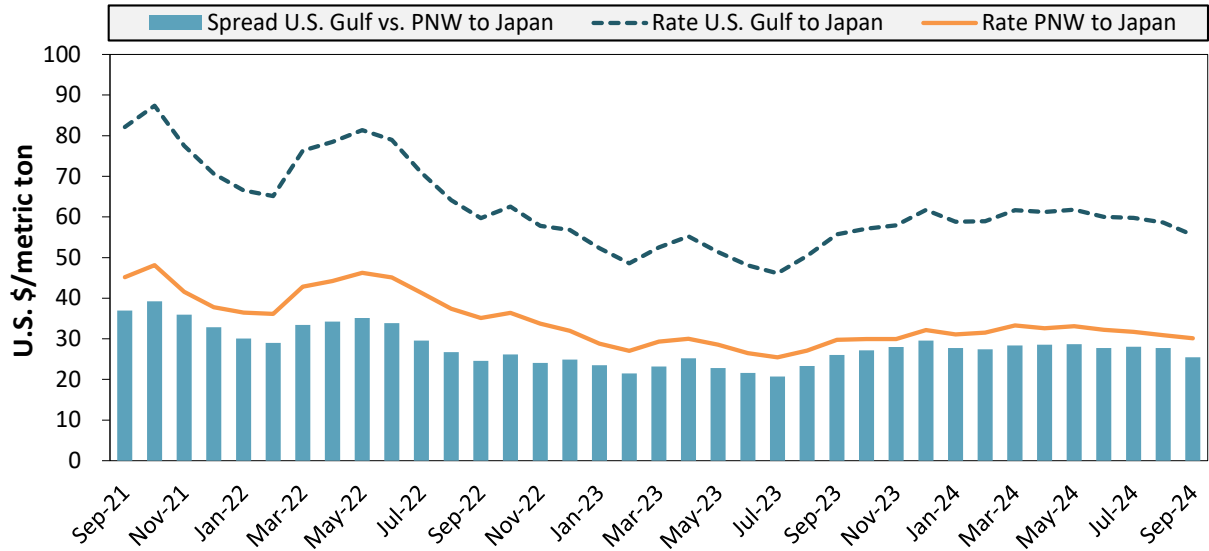
Figure 18. U.S . Gulf vessel loading activity



Week ending 10/17/24, number of vessels	Loaded	Due
Change from last year	12%	51%
Change from 4-year average	8%	21%

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.

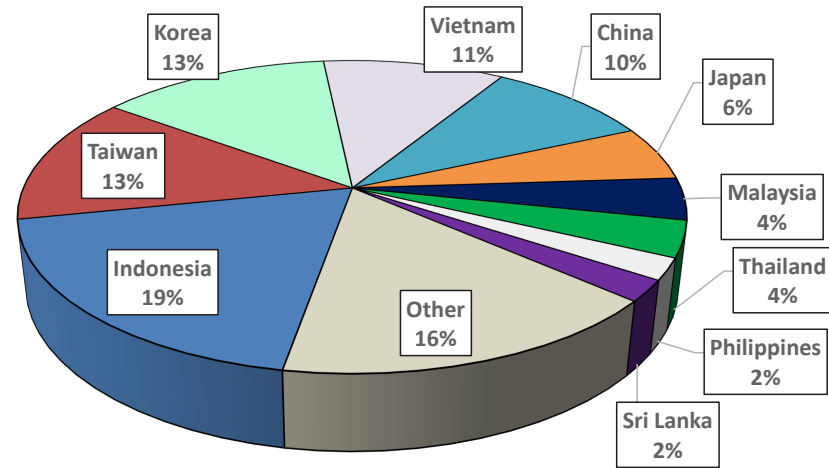
Table 20. Ocean freight rates for selected shipments, week ending 10/20/2024

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.

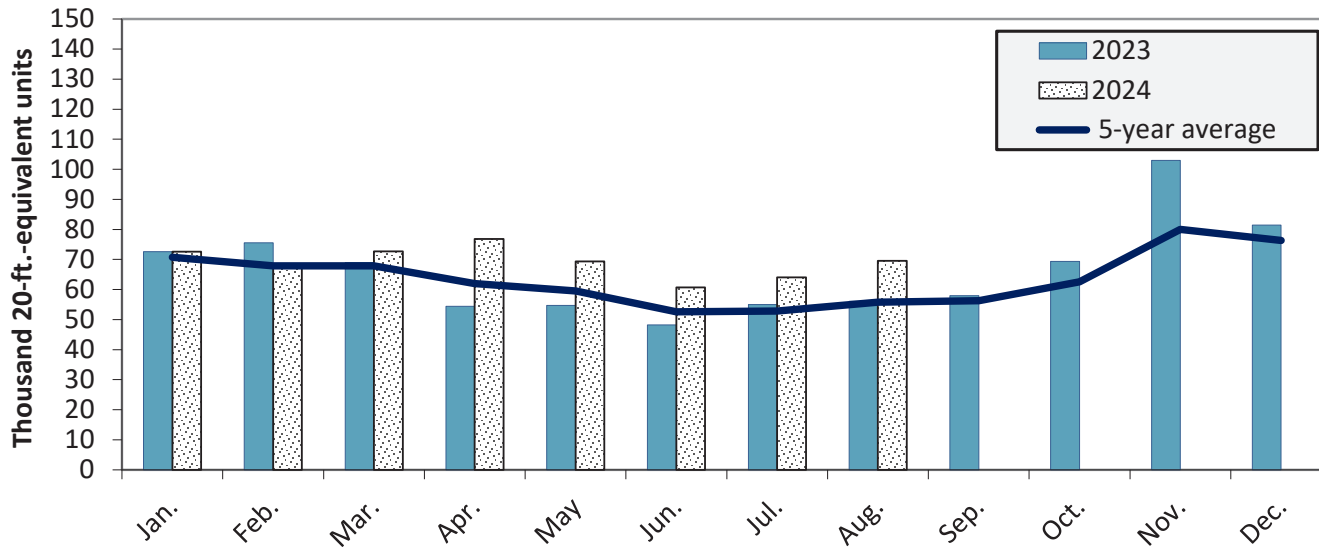
Figure 20. Top 10 destination markets for U.S. containerized grain exports, Jan-Aug 2024



Note: 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.

Figure 21. Monthly shipments of U.S. containerized grain exports



Containerized grain shipments in Aug. 2024 were up 24.1 percent from last year and up 24.6 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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