



Grain Transportation Report

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www.ams.usda.gov/GTR

Canadian National to Acquire Iowa Northern Railway. On December 6, Canadian National Railway (CN) [announced](#) that it has signed and closed an agreement to acquire Iowa Northern Railway (IANR). IANR operates approximately 275 track miles, and it interchanges with three Class I railroads (CN, CPKC, and Union Pacific Railroad). The main line runs diagonally through Iowa—northwest to southeast, from Manly to Cedar Rapids—and the railroad has two additional branch lines (one from Waterloo to Oelwein and the other from Forest City to Belmond).

IANR serves 20 country grain elevators and two ethanol plants. It also transports other agricultural inputs such as fertilizer, chemicals, and farm machinery. CN's acquisition of IANR is subject to review by the Surface Transportation Board.



Oregon Cooperative Unloads 8,500-Foot Grain Train. Constituting the longest grain train ever unloaded in the United States, [an 8,500-foot CPKC train was unloaded](#) at a Columbia River terminal in Boardman, OR, on November 15. Commissioned by Morrow County Grain Growers, Inc., a cooperative in eastern Oregon, the train comprised 142 cars hauling 550,000 bushels of corn for use by local livestock farmers.

After loading at the Farmers Elevator Co. in Honeyford, ND, the train traveled north and then west through Canada (on CPKC's network) and on to an interchange point with Union Pacific Railway (UP) near Eastport, ID. From there, UP moved the train to its destination in Boardman, OR.

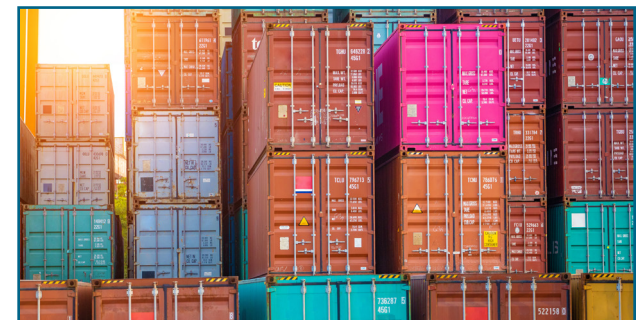
Typically, grain shuttle trains comprise about 110 cars and measure approximately 7,000 feet long. The longer trains, referred to as High Efficiency Product (HEP) trains, were [introduced in 2018](#) by Canadian Pacific Railway (which merged with Kansas City Southern earlier this year to become CPKC). In addition to the Honeyford, ND, elevator, seven other U.S. elevators are capable of loading a HEP train.



Grain Exporters Face Container Shortages Because of Weak U.S. Imports. According to the *Journal of Commerce*, agricultural exporters in the Midwest are reporting container equipment shortages—particularly, in the Chicago area. These shortages have been attributed to weak U.S. containerized imports from Asia: year to date through October, these imports were down 17 percent from the same period last year.

Typically, containerized grain exports are backhaul movements—i.e., they fill empty containers returning to their point of origin after the initial fronthaul movement. When containerized imports decline, as has been the case so far this year, there are also fewer empty containers available for agricultural exports in the interior.

In the first 8 months of 2023, the United States exported 482,549 20-foot-equivalent units (TEU) of containerized grain. This was down 1.6 percent from the same period last year and down 2.5 percent from the prior 5-year average. Containerized grain exports typically peak in November ([GTR fig. 19](#)).



Export Sales

For the week ending November 23, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2023/24 totaled 35.52 million metric tons (mmt), up 6 percent from last week and up 2 percent from the same time last year.

Net **corn export sales** for MY 2023/24 were 1.928 mmt, up 35 percent from last week. Net **soybean export sales** were 1.895 mmt, up 97 percent from last week. Net weekly **wheat export sales** were 0.623 mmt, up 263 percent from last week.

Rail

U.S. Class I railroads originated 21,180 **grain carloads** during the week ending November 25. This was a 28-percent decrease from the previous week, 12 percent fewer than last year, and 20 percent fewer than the 3-year average.

Average December **shuttle secondary railcar bids/offers** (per car) were at tariff for the week ending November 30. This was \$44 less than last week and \$665 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$275 above tariff. This was \$13 more than last week and \$317 lower than this week last year.

Barge

For the week ending December 2, **barged grain movements** totaled 716,754 tons. This was 23 percent less than the previous week and 11 percent less than the same period last year.

For the week ending December 2, 452 grain barges **moved down river**—140 fewer than last week. There were 532 grain barges **unloaded** in the New Orleans region, 17 percent fewer than last week.

Ocean

For the week ending November 30, 28 **oceangoing grain vessels** were loaded in the Gulf—8 percent more than the same period last year. Within the next 10 days (starting December 1), 56 vessels were expected to be loaded—65 percent more than the same period last year.

As of December 6, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$62.75. This was 10 percent higher than the week of November 22. The rate from the Pacific Northwest to Japan was \$32.50 per mt, 10 percent more than the week of November 22.

Fuel

For the week ending December 4, the U.S. average **diesel price** decreased 5.4 cents from the previous week to \$4.092 per gallon, 87.5 cents below the same week last year.



USDA's Open Data Platform Launches New Products

Today, on the [Agricultural Transportation Open Data Platform](#) (“AgTransport”), USDA’s Agricultural Marketing Service (AMS) launches a new dashboard, [Transportation at a Glance](#), and an upgraded version of the [Transportation Updates and Regulatory News \(TURN\) report](#). *Transportation at a Glance* is intended to be a “one-stop shop” to view key volume, rate, and service metrics across all modes. The upgraded TURN report makes agricultural transportation news more accessible and timelier, replacing the prior, quarterly, PDF-based version. Both new AgTransport features give users a birds-eye view of critical, timely agricultural transportation information to optimize decision making.

Transportation at a Glance

Agricultural shippers, carriers, and other stakeholders count on accurate and timely data to make informed decisions, such as where and when to ship grain and how to allocate scarce capacity. With interactive charts on key metrics for each mode, *Transportation at a Glance*

- Provides a quick snapshot of key metrics across all modes, which saves time compared to viewing each modal dashboard separately; and
- Enables quick comparisons of different modes—especially useful during transportation disruptions or harvest season.

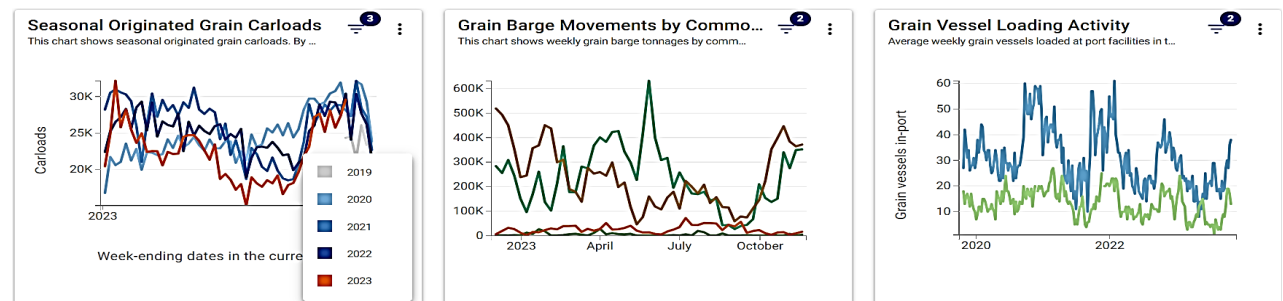
Transportation at a Glance displays the following key metrics:

Shipment Volumes. The dashboard’s first section compares, side by side, weekly data on grain carloads by rail; downbound grain tonnages by barge; and grain vessels loaded (by region) (fig. 1). Also included in the dashboard’s first section (but not shown in fig. 1) is a

graph tracking amounts of grain inspected, by commodity.

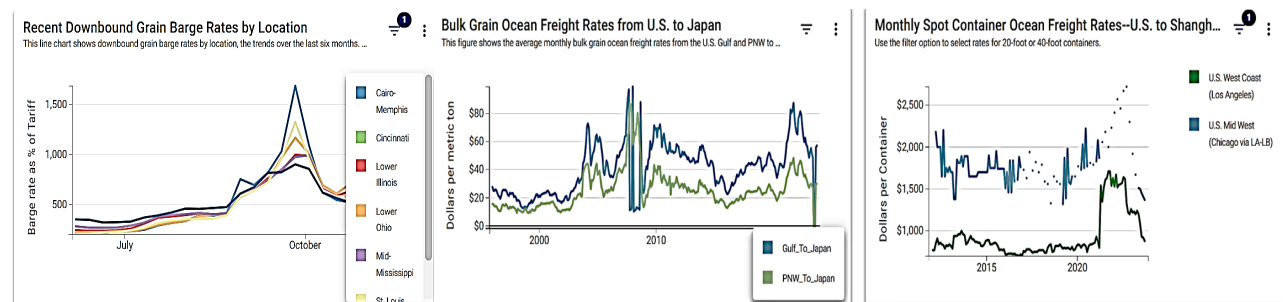
Rates. The second dashboard section shows a set of rate graphs: downbound grain barge rates (by location); monthly bulk ocean freight rates; and monthly container spot rates (fig. 2). Also included in the second section (but not shown in fig. 2) are graphs tracking weekly rail car bids and weekly grain truck spot rates.

Figure 1. Weekly grain movements



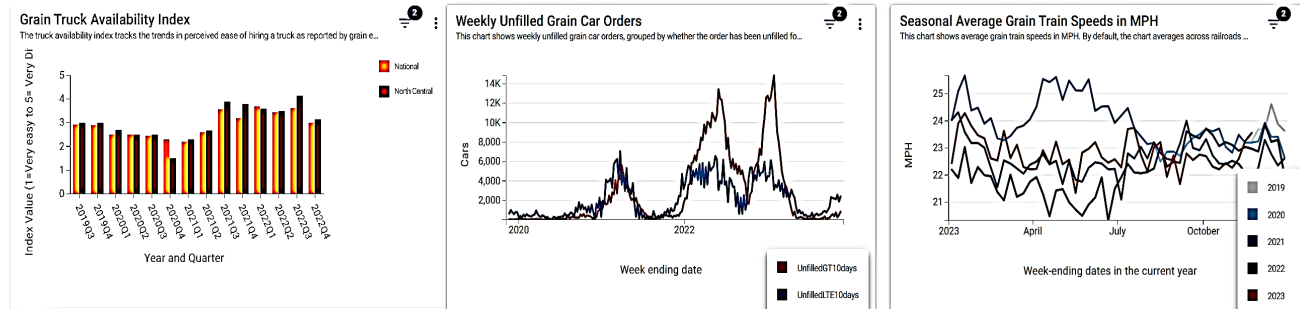
Source: USDA, Agricultural Marketing Service.

Figure 2. Weekly and monthly grain transportation rates



Source: USDA, Agricultural Marketing Service.

Figure 3. Service metrics



Source: USDA, Agricultural Marketing Service.

Service. The final dashboard section (fig. 3) shows graphs of several critical service metrics related to grain transportation, including quarterly grain truck availability and two metrics for weekly rail service for grain—(1) the number of unfilled grain car orders in manifest service and (2) grain train speeds.

TURN’s New Dashboard Format

TURN showcases the latest news about industrial developments and trends—as well as Federal and State regulatory policy affecting all modes of agricultural transportation. TURN also alerts readers to the latest transportation research, relevant to agricultural stakeholders—including research by Federal and State governments, universities, and trade associations. Previously published quarterly in a PDF format, the new web-format TURN is updated *weekly*, enabling quicker and more real-time insights.

TURN’s new functionality enhances users’ experience in the following aspects:

- The dashboard’s introduction gives a quick snapshot of the latest headlines, which are linked to the full content under the relevant modal sections.
- “News by Mode” hyperlinks in the introduction provide a convenient way to navigate the page for specific content.
- Most of the news items are presented in a two-column, landscape format for improved readability.
- Historical news items that are older than 2 weeks are available in a downloadable dataset (e.g., Excel or different tabular format, if preferred) going back to January 2023. The file can be searched and filtered by date, mode, commodity, and type (e.g., project announcement, proposed or finalized rule, research study). This format should aid the retrieval and analysis of historical news, which was not previously possible.

More on the Agricultural Transportation Open Data Platform

Please visit [AgTransport](https://www.agtransport.gov) to access the latest data and news, and to interact with the new dashboards.

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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.

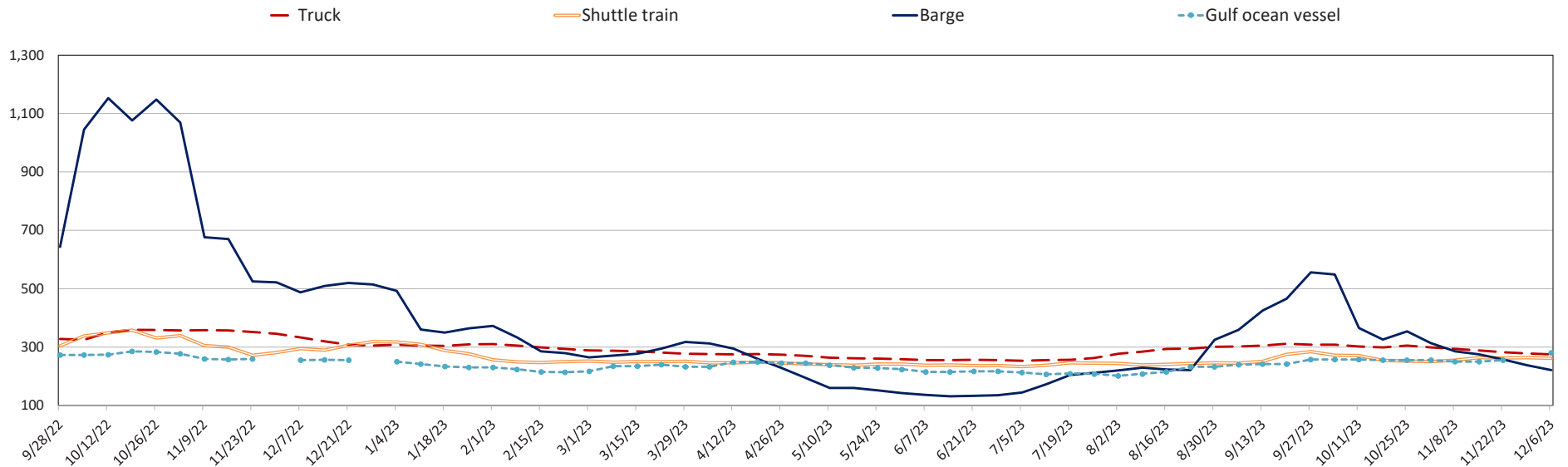
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
12/06/23	275	347	261	221	281	230
11/29/23	278	347	264	238	n/a	n/a
12/07/22	333	370	294	488	255	229

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 due to holiday.

Source: USDA, Agricultural Marketing Service.

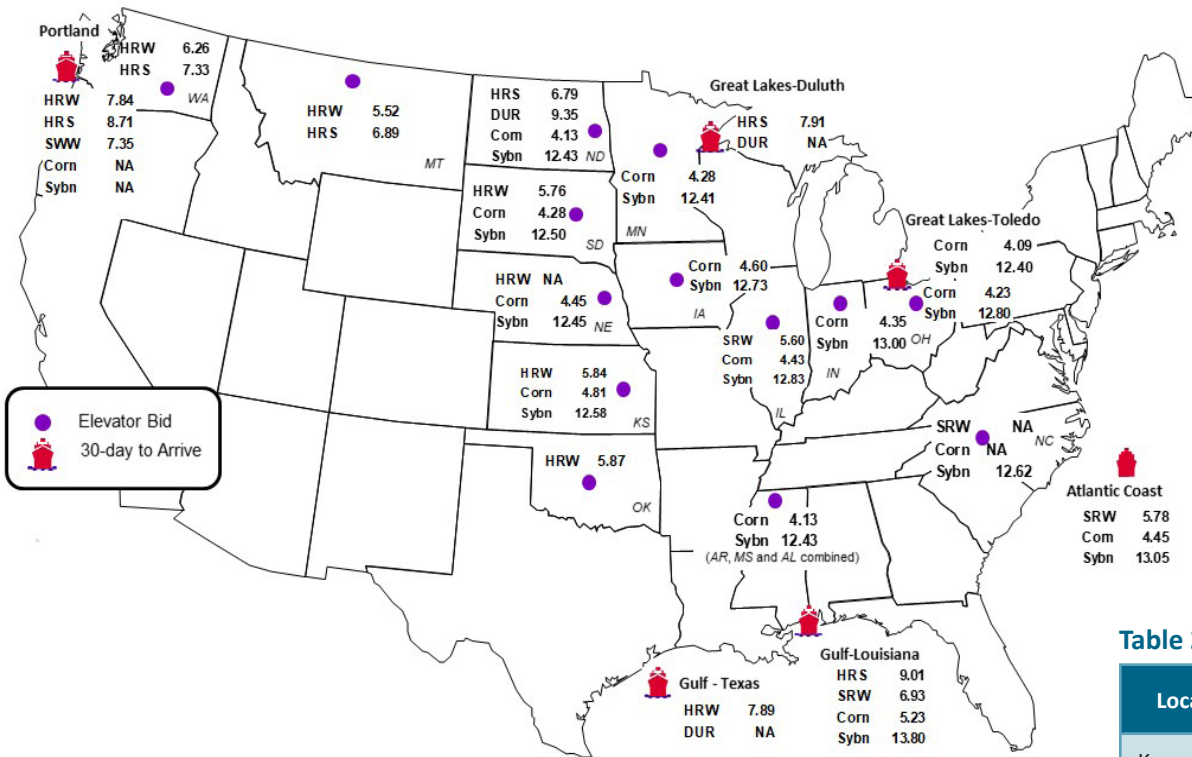
Figure 1. Grain transportation cost indicators as of week ending 12/06/23



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	12/1/2023	11/24/2023
Corn	IL-Gulf	-0.80	-0.82
Corn	NE-Gulf	-0.78	-0.86
Soybean	IA-Gulf	-1.06	-0.79
HRW	KS-Gulf	-2.05	-2.50
HRS	ND-Portland	-1.92	-2.37

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	12/1/2023	Week ago 11/24/2023	Year ago 12/2/2022
Kansas City	Wheat	Dec	6.526	6.086	8.726
Minneapolis	Wheat	Dec	7.024	6.966	9.216
Chicago	Wheat	Dec	6.122	5.720	7.632
Chicago	Corn	Dec	4.842	4.774	6.466
Chicago	Soybean	Jan	13.266	13.314	14.454

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.

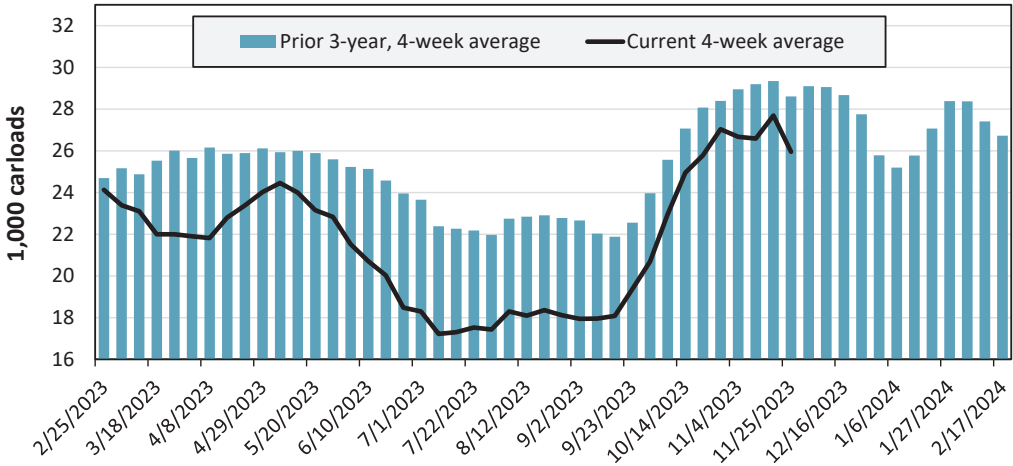
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 11/25/2023	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,225	1,812	10,406	4,518	2,190	1,029	21,180
This week last year	1,611	2,928	9,908	4,797	3,038	1,801	24,083
2023 YTD	82,307	114,627	433,363	246,434	115,084	59,939	1,051,754
2022 YTD	82,980	115,477	519,059	270,499	125,304	74,227	1,187,546
2023 YTD as % of 2022 YTD	99	99	83	91	92	81	89
Last 4 weeks as % of 2022	91	74	99	97	96	75	93
Last 4 weeks as % of 3-yr. avg.	95	84	91	90	98	81	91
Total 2022	93,392	129,293	571,376	297,775	140,039	83,680	1,315,555

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 November 25, grain carloads were down 6 percent from the previous week, down 7 percent from last year, and down 9 percent from the 3-year average.

Source: Surface Transportation Board.

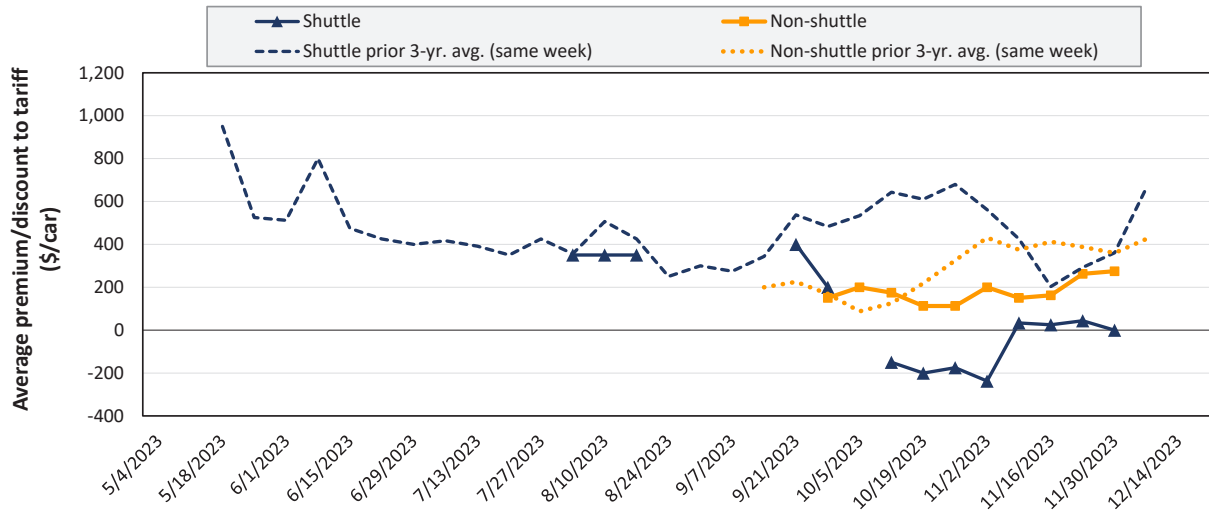
Table 4. Railcar auction offerings (dollars per car)

For the week ending: 11/30/2023		Delivery period							
		Dec-23	Dec-22	Jan-24	Jan-23	Feb-24	Feb-23	Mar-24	Mar-23
BNSF	COT grain units	no offer	no bids	no offer	31	no offer	40	no offer	0
	COT grain single-car	n/a	no bids	no offer	538	no offer	455	no offer	453
UP	GCAS/vouchers	n/a	n/a	no bid	n/a	no bid	n/a	no bid	n/a

Note: Auction offerings are for single-car and unit train shipments only. Bids and offers represent a premium/discount to tariff rates. n/a = not available. BNSF = BNSF Railway; COT = Certificate of Transportation; UP = Union Pacific Railroad; and GCAS = Grain Car Allocation System. Minimum bids for UP GCAS/vouchers are \$10.
Source: USDA, Agricultural Marketing Service.

Primary auction market rates reflect offers and bids made between railroads and shippers for guaranteed car service. The secondary rail market information reflects trade values for service agreements traded between shippers that were originally purchased from the railroad carrier. The auction and secondary rail values are indicators of rail service quality and demand/supply. Bids and offers listed in the primary and secondary auctions are market indicators only and are not guaranteed prices.

Figure 4: Secondary market bids/offers for railcars to be delivered in December 2023



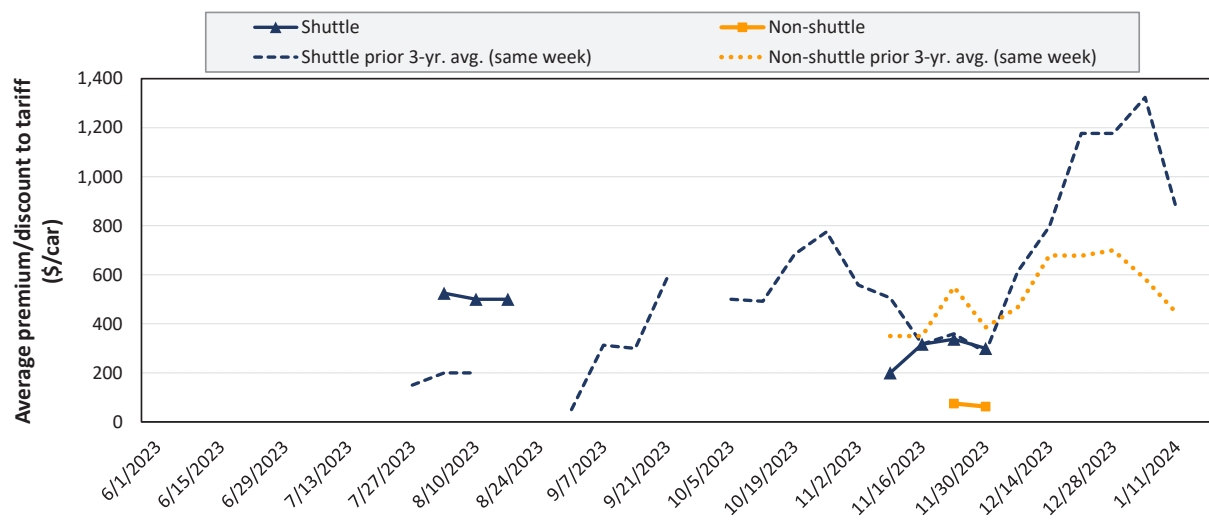
Average non-shuttle bids/offers rose \$13 this week, and are at the peak.

Average shuttle bids/offers fell \$44 this week and are \$400 below the peak.

11/30/2023	BNSF	UP
Non-Shuttle	\$275	n/a
Shuttle	\$350	-\$350

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 5: Secondary market bids/offers for railcars to be delivered in January 2024



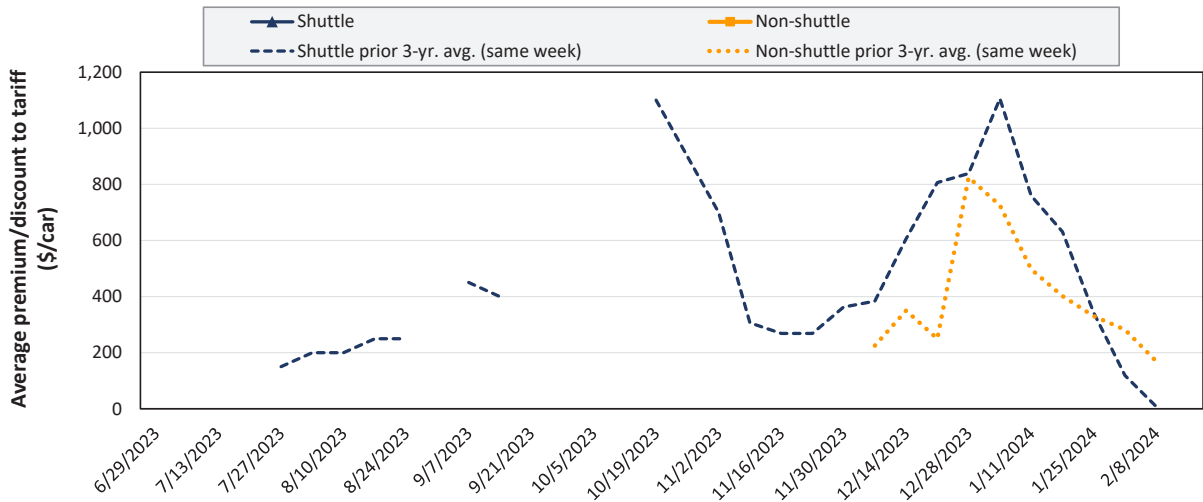
Average non-shuttle bids/offers fell \$13 this week, and are \$13 below the peak.

Average shuttle bids/offers fell \$38 this week and are \$225 below the peak.

11/30/2023	BNSF	UP
Non-Shuttle	\$100	\$25
Shuttle	\$300	n/a

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

Figure 6: Secondary market bids/offers for railcars to be delivered in February 2024



There were no non-shuttle bids/offers this week.

There were no shuttle bids/offers this week.

11/30/2023	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

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

Table 5. Weekly secondary railcar market (dollars per car)

For the week ending: 11/30/2023		Delivery period					
		Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24
Non-shuttle	BNSF	275	100	n/a	n/a	n/a	n/a
	Change from last week	12	25	n/a	n/a	n/a	n/a
	Change from same week 2022	-108	-350	n/a	n/a	n/a	n/a
	UP	n/a	25	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2022	n/a	-775	n/a	n/a	n/a	n/a
Shuttle	BNSF	350	300	n/a	n/a	n/a	n/a
	Change from last week	25	-38	n/a	n/a	n/a	n/a
	Change from same week 2022	38	-50	n/a	n/a	n/a	n/a
	UP	-350	n/a	n/a	n/a	n/a	n/a
	Change from last week	-112	n/a	n/a	n/a	n/a	n/a
	Change from same week 2022	-1,367	n/a	n/a	n/a	n/a	n/a
	CPKC	100	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2022	-400	n/a	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

December 2023	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	\$4,095	\$248	\$43.13	\$1.17	4
	Grand Forks, ND	Duluth-Superior, MN	\$4,008	\$95	\$40.75	\$1.11	2
	Wichita, KS	Los Angeles, CA	\$7,340	\$490	\$77.75	\$2.12	-5
	Wichita, KS	New Orleans, LA	\$4,825	\$436	\$52.25	\$1.42	2
	Sioux Falls, SD	Galveston-Houston, TX	\$7,111	\$402	\$74.61	\$2.03	-4
	Colby, KS	Galveston-Houston, TX	\$5,075	\$478	\$55.14	\$1.50	2
	Amarillo, TX	Los Angeles, CA	\$5,121	\$665	\$57.46	\$1.56	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$493	\$44.62	\$1.13	-3
	Toledo, OH	Raleigh, NC	\$8,877	\$542	\$93.53	\$2.38	2
	Des Moines, IA	Davenport, IA	\$2,830	\$104	\$29.14	\$0.74	5
	Indianapolis, IN	Atlanta, GA	\$6,866	\$407	\$72.22	\$1.83	2
	Indianapolis, IN	Knoxville, TN	\$5,790	\$263	\$60.11	\$1.53	3
	Des Moines, IA	Little Rock, AR	\$4,425	\$307	\$46.99	\$1.19	2
	Des Moines, IA	Los Angeles, CA	\$6,305	\$893	\$71.48	\$1.82	-1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,156	\$738	\$38.67	\$1.05	-39
	Toledo, OH	Huntsville, AL	\$7,269	\$386	\$76.02	\$2.07	2
	Indianapolis, IN	Raleigh, NC	\$8,169	\$549	\$86.58	\$2.36	2
	Indianapolis, IN	Huntsville, AL	\$5,921	\$261	\$61.39	\$1.67	3
	Champaign-Urbana, IL	New Orleans, LA	\$5,040	\$493	\$54.94	\$1.50	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 7. Tariff rail rates for shuttle train shipments

December 2023	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	\$4,543	\$282	\$47.91	\$1.30	-0
	Wichita, KS	Galveston-Houston, TX	\$4,611	\$219	\$47.97	\$1.31	4
	Chicago, IL	Albany, NY	\$7,413	\$512	\$78.69	\$2.14	2
	Grand Forks, ND	Portland, OR	\$6,201	\$486	\$66.41	\$1.81	-2
	Grand Forks, ND	Galveston-Houston, TX	\$5,549	\$507	\$60.13	\$1.64	-2
	Colby, KS	Portland, OR	\$5,923	\$784	\$66.60	\$1.81	-3
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$592	\$62.09	\$1.58	-5
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$542	\$61.20	\$1.55	-5
	Champaign-Urbana, IL	New Orleans, LA	\$4,345	\$493	\$48.04	\$1.22	1
	Lincoln, NE	Galveston-Houston, TX	\$4,560	\$316	\$48.42	\$1.23	0
	Des Moines, IA	Amarillo, TX	\$4,845	\$386	\$51.94	\$1.32	1
	Minneapolis, MN	Tacoma, WA	\$5,660	\$588	\$62.04	\$1.58	-5
	Council Bluffs, IA	Stockton, CA	\$5,780	\$608	\$63.43	\$1.61	-2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,335	\$542	\$68.30	\$1.86	-4
	Minneapolis, MN	Portland, OR	\$6,385	\$592	\$69.29	\$1.89	-5
	Fargo, ND	Tacoma, WA	\$6,235	\$482	\$66.71	\$1.82	-4
	Council Bluffs, IA	New Orleans, LA	\$5,270	\$568	\$57.98	\$1.58	0
	Toledo, OH	Huntsville, AL	\$5,509	\$386	\$58.54	\$1.59	2
	Grand Island, NE	Portland, OR	\$5,905	\$802	\$66.61	\$1.81	-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.

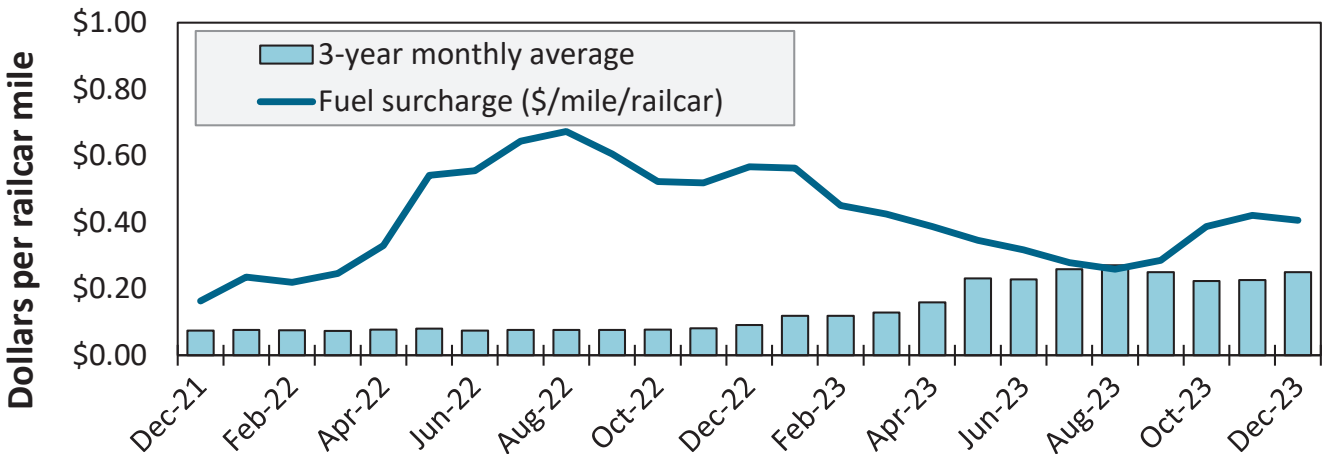
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico

December 2021	Origin state	Destination region	Tariff rate per car	Fuel surcharge per car	Tariff rate plus fuel surcharge per:		Percent change Y/Y
					metric ton	bushel	
Wheat	MT	Chihuahua, CI	\$7,699	\$0	\$78.67	\$2.14	4
	OK	Cuautitlan, EM	\$6,900	\$230	\$72.85	\$1.98	6
	KS	Guadalajara, JA	\$7,619	\$719	\$85.19	\$2.32	7
	TX	Salinas Victoria, NL	\$4,420	\$138	\$46.57	\$1.27	4
Corn	IA	Guadalajara, JA	\$9,102	\$663	\$99.77	\$2.53	6
	SD	Celaya, GJ	\$8,300	\$0	\$84.81	\$2.15	2
	NE	Queretaro, QA	\$8,322	\$462	\$89.75	\$2.28	5
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,687	\$450	\$83.14	\$2.11	5
	SD	Torreón, CU	\$7,825	\$0	\$79.95	\$2.03	2
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$614	\$94.63	\$2.57	5
	NE	Guadalajara, JA	\$9,207	\$646	\$100.67	\$2.74	5
	IA	El Castillo, JA	\$9,510	\$0	\$97.17	\$2.64	1
	KS	Torreón, CU	\$8,109	\$466	\$87.61	\$2.38	5
Sorghum	NE	Celaya, GJ	\$7,932	\$597	\$87.15	\$2.21	6
	KS	Queretaro, QA	\$8,108	\$287	\$85.77	\$2.18	3
	NE	Salinas Victoria, NL	\$6,713	\$231	\$70.94	\$1.80	3
	NE	Torreón, CU	\$7,225	\$438	\$78.29	\$1.99	6

Note: Rates are based on published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements. The table assumes 97.87 metric tons per car, 56 pounds per bushel for corn and sorghum, and 60 pounds per bushel for wheat and soybeans. Percentage change year over year (Y/Y) is calculated using the tariff rate plus fuel surcharge. **As of January 1, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico. As we incorporate the change, table 8 updates will be delayed.**
 Source: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

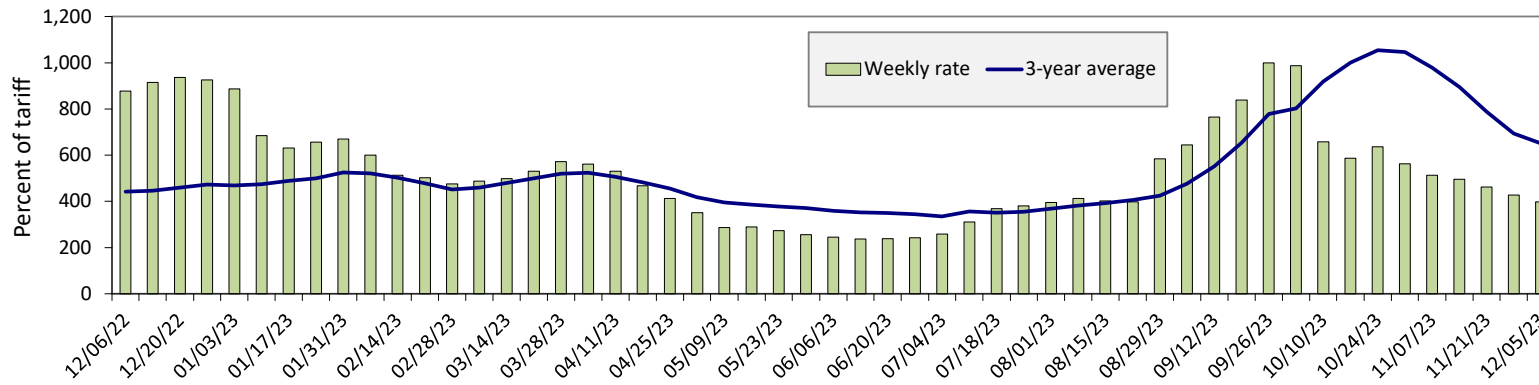
Figure 7. Railroad fuel surcharges, North American weighted average



December 2023: \$0.41/mile, down 1 cent from last month's surcharge of \$0.42/mile; down 16 cents from the December 2022 surcharge of \$0.57/mile; and up 16 cents from the December prior 3-year average of \$0.25/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 8. Illinois River barge freight rate



For the week ending December 5: 7 percent lower than the previous week; and 55 percent lower than last year; and 39 percent lower than the 3-year average.

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

Table 9. Weekly barge freight rates: southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate	12/5/2023	-	397	397	344	369	369	297
	11/28/2023	-	427	428	377	428	428	339
\$/ton	12/5/2023	-	21.12	18.42	13.73	17.31	14.91	9.33
	11/28/2023	-	22.72	19.86	15.04	20.07	17.29	10.64
Measure	Time Period	Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Current week % change from the same week	Last year	-	-52	-55	-57	-54	-54	-58
	3-year avg.	-	-37	-39	-37	-42	-42	-40
Rate	January	-	-	398	346	379	379	301
	March	-	-	383	328	349	349	292

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; "-" = data not available.
Source: USDA, Agricultural Marketing Service.

Figure 9. Benchmark tariff rates



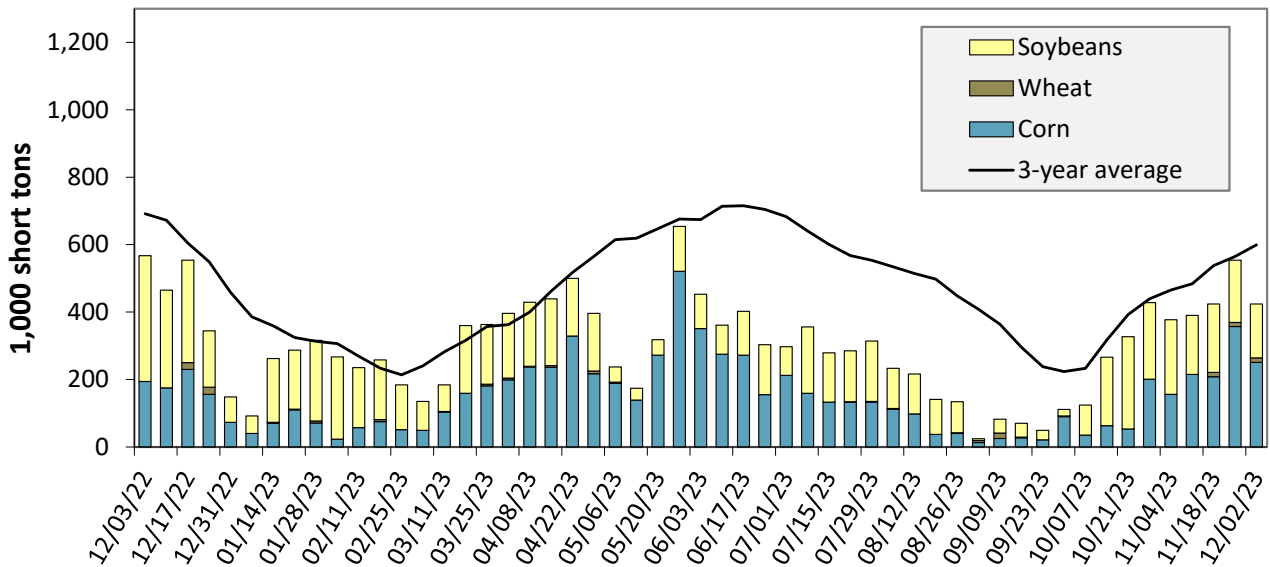
Calculating barge rate per ton:

$$\text{Rate} = (\text{Rate} \times 1976 \text{ tariff benchmark rate per ton}) / 100$$

Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.

Source: USDA, Agricultural Marketing Service.

Figure 10. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending December 2: 25 percent lower than last year and 29 percent lower 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.

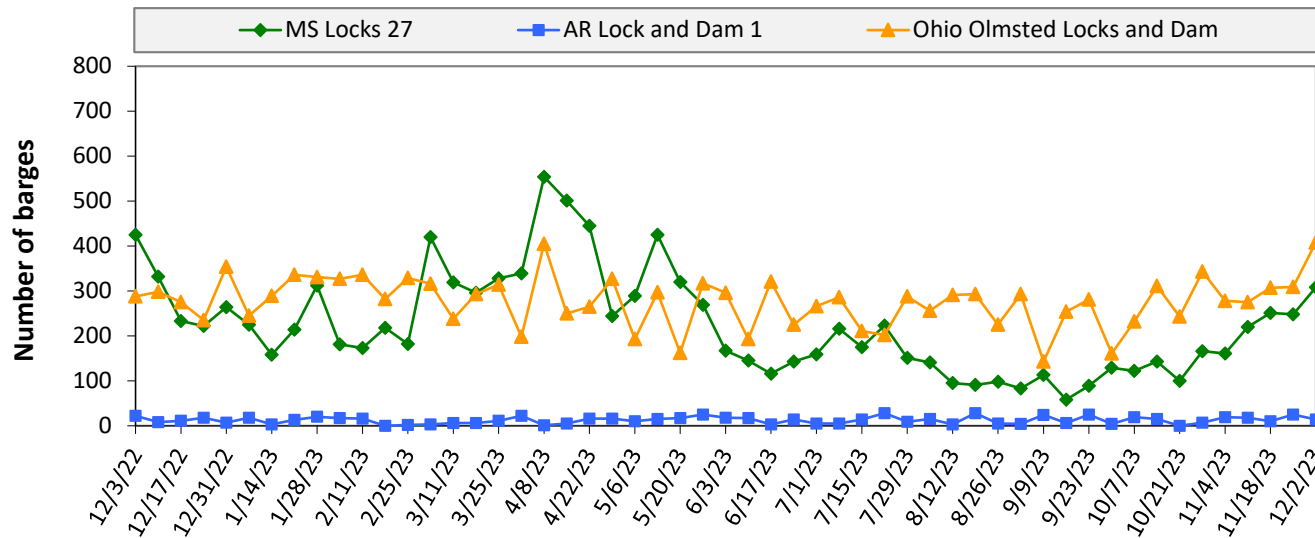
Table 10. Barged grain movements (1,000 tons)

For the week ending 12/02/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	91	3	112	0	206
Mississippi River (Winfield, MO (L25))	164	13	128	0	304
Mississippi River (Alton, IL (L26))	228	13	142	0	383
Mississippi River (Granite City, IL (L27))	251	13	160	0	423
Illinois River (La Grange)	101	0	19	0	120
Ohio River (Olmsted)	134	11	101	22	267
Arkansas River (L1)	0	8	18	0	27
Weekly total - 2023	385	32	279	22	717
Weekly total - 2022	284	6	519	0	808
2023 YTD	11,811	1,254	10,780	241	24,086
2022 YTD	15,477	1,506	12,929	227	30,139
2023 as % of 2022 YTD	76	83	83	106	80
Last 4 weeks as % of 2022	142	1,028	76	-	104
Total 2022	16,437	1,594	14,464	232	32,727

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.

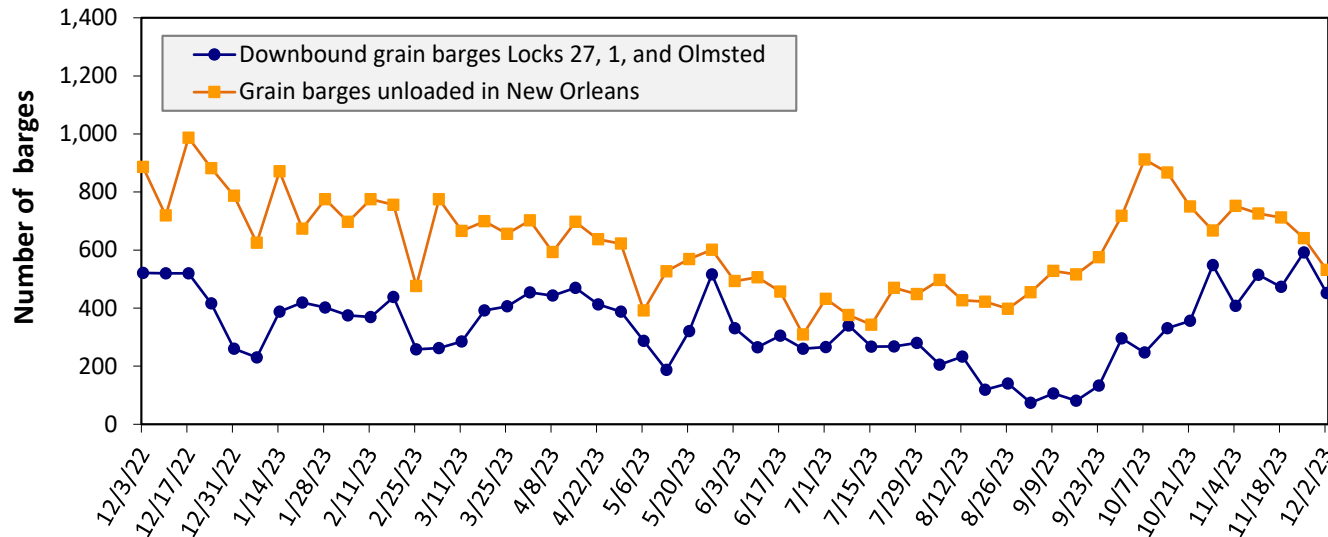
Figure 11. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending December 2: 730 barges transited the locks, 148 barges more than the previous week, and 2 percent lower than the 3-year average.

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

Figure 12. Grain barges for export in New Orleans region



For the week ending December 2: 452 barges moved down river, 140 fewer than the previous week; 532 grain barges unloaded in the New Orleans Region, 17 percent fewer than the previous week.

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

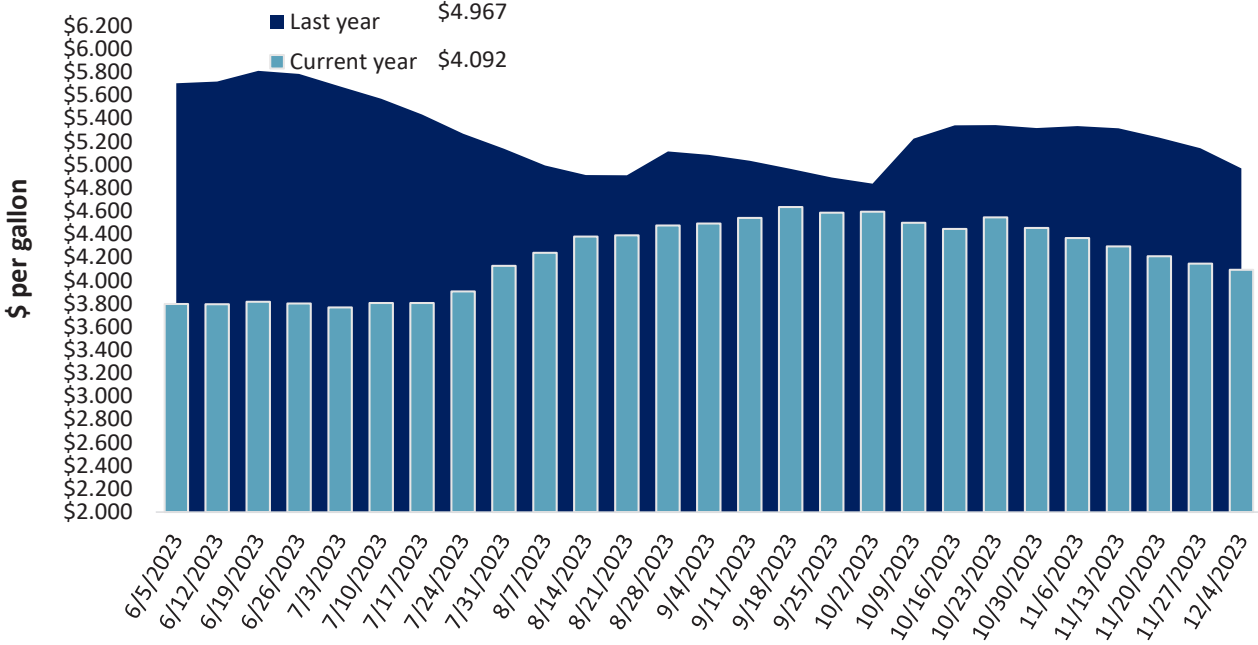
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11. Retail on-highway diesel prices, week ending 12/4/2023 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.139	0.018	-1.052
	New England	4.432	-0.015	-1.202
	Central Atlantic	4.458	-0.009	-1.271
	Lower Atlantic	3.990	0.031	-0.963
II	Midwest	4.025	-0.090	-0.882
III	Gulf Coast	3.737	-0.056	-0.787
IV	Rocky Mountain	4.128	-0.076	-1.122
V	West Coast	4.912	-0.085	-0.590
	West Coast less California	4.418	-0.072	-0.809
	California	5.480	-0.099	-0.336
Total	United States	4.092	-0.054	-0.875

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



For the week ending December 4, the U.S. average diesel fuel price decreased 5.4 cents from the previous week to \$4.092 per gallon, 87.5 cents below the same week last year.

Note: On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
 Source: U.S. Department of Energy, Energy Information Administration.

Table 12. U.S. export balances and cumulative exports (1,000 metric tons)

Grain Exports		Wheat					Corn	Soybeans	Total	
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum				All wheat
Current unshipped (outstanding) export sales	For the week ending 11/23/2023	985	1,216	1,500	959	124	4,784	16,837	13,895	35,516
	This week year ago	837	529	1,371	1,097	123	3,957	12,579	18,232	34,768
	Last 4 wks. as % of same period 2022/23	107	205	113	92	102	118	120	74	95
Current shipped (cumulative) exports sales	2023/24 YTD	1,423	1,717	2,826	1,734	204	7,903	7,621	17,056	32,580
	2022/23 YTD	2,800	1,683	2,769	2,146	97	9,495	5,773	18,845	34,113
	YTD 2023/24 as % of 2022/23	51	102	102	81	211	83	132	91	96
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435
	Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622

Note: The marketing year for wheat is Jun. 1 to May 31 and, for corn and soybeans, Sep. 1 to Aug. 31. YTD = year-to-date; wks. = weeks.

Source: USDA, Foreign Agricultural Service.

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

For the week ending 11/23/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
Mexico	12,002	9,066	32	15,227
China	1,131	3,502	-68	12,616
Japan	3,227	1,484	117	10,273
Columbia	1,889	307	516	4,398
Korea	335	19	1627	2,563
Top 5 importers	18,584	14,379	29	45,077
Total U.S. corn export sales	24,459	18,352	33	56,665
% of YTD current month's export projection	46%	43%		
Change from prior week	1,928	603		
Top 5 importers' share of U.S. corn export sales	76%	78%		80%
USDA forecast November 2023	52,708	42,192	25	
Corn use for ethanol USDA forecast, November 2023	135,255	131,471	3	

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.

Source: USDA, Foreign Agricultural Service.

Table 14. Top 5 importers of U.S. soybeans

For the week ending 11/23/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
China	16,978	22,602	-25	32,321
Mexico	2,912	2,889	1	4,912
Egypt	218	744	-71	2,670
Japan	1,039	1,136	-9	2,259
Indonesia	543	460	18	1,973
Top 5 importers	21,689	27,832	-22	44,133
Total U.S. soybean export sales	30,950	37,078	-17	56,656
% of YTD current month's export projection	65%	68%		
Change from prior week	1,895	623		
Top 5 importers' share of U.S. soybean export sales	70%	75%		78%
USDA forecast, November 2023	47,763	54,213	-12	

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.

Source: USDA, Foreign Agricultural Service.

Table 15. Top 10 importers of all U.S. wheat

For the week ending 11/23/2023	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2020-22 (1,000 mt)
	YTD MY 2023/24	YTD MY 2022/23		
Mexico	1,825	1,681	9	3,397
Philippines	1,825	1,681	9	2,615
Japan	1,299	1,450	-10	2,281
China	1,010	616	64	1,740
Korea	880	887	-1	1,426
Nigeria	189	630	-70	1,276
Taiwan	715	504	42	944
Thailand	281	502	-44	643
Columbia	195	406	-52	537
Indonesia	258	299	-14	469
Top 10 importers	8,475	8,655	-2	15,327
Total U.S. wheat export sales	12,688	13,452	-6	20,411
% of YTD current month's export projection	67%	65%		
Change from prior week	623	155		
Top 10 importers' share of U.S. wheat export sales	67%	64%		75%
USDA forecast, November 2023	19,051	20,657	-8	

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.

Source: USDA, Foreign Agricultural Service.

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

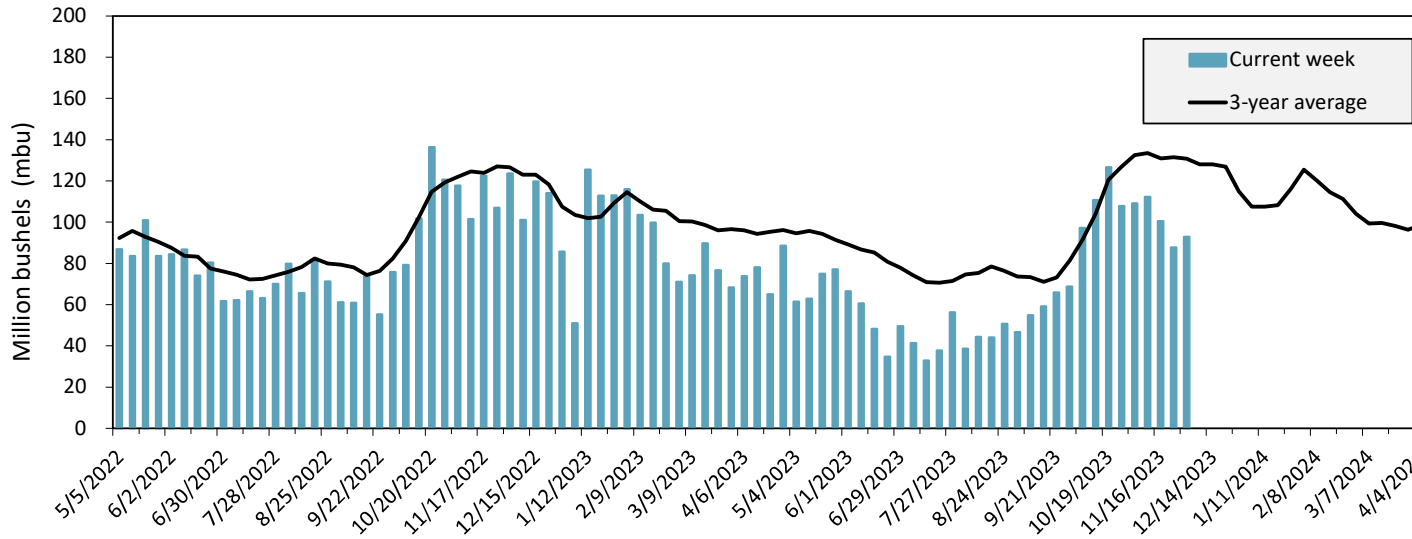
Port regions	Commodity	For the week ending 11/30/2023	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of:		2022 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Wheat	120	223	54	9,355	9,388	100	136	102	9,836
	Corn	393	0	n/a	4,387	9,089	48	338	149	9,615
	Soybeans	287	569	50	9,560	12,603	76	73	72	14,178
	Total	799	793	101	23,302	31,081	75	93	84	33,629
Mississippi Gulf	Wheat	39	14	277	3,292	3,985	83	326	103	4,053
	Corn	432	200	216	21,052	29,171	72	100	71	30,781
	Soybeans	630	822	77	25,372	26,756	95	72	65	31,283
	Total	1,100	1,036	106	49,715	59,913	83	79	67	66,116
Texas Gulf	Wheat	0	11	0	1,579	3,264	48	16	18	3,421
	Corn	9	8	106	341	601	57	168	105	648
	Soybeans	0	0	n/a	281	544	52	0	0	685
	Total	9	19	47	2,200	4,410	50	16	15	4,754
Interior	Wheat	18	43	42	2,190	2,670	82	63	60	2,912
	Corn	304	186	163	9,346	8,281	113	143	129	8,961
	Soybeans	129	158	81	6,111	6,492	94	126	115	7,109
	Total	452	388	116	17,647	17,444	101	126	115	18,982
Great Lakes	Wheat	21	12	176	441	337	131	107	78	395
	Corn	0	0	n/a	56	148	38	n/a	211	158
	Soybeans	0	0	n/a	200	668	30	27	20	760
	Total	21	12	176	696	1,153	60	54	38	1,312
Atlantic	Wheat	0	0	n/a	106	169	63	n/a	0	169
	Corn	0	7	0	128	297	43	77	209	309
	Soybeans	66	107	62	1,926	2,431	79	78	77	2,867
	Total	66	114	58	2,160	2,897	75	78	76	3,345
U.S. total from ports*	Wheat	198	303	65	16,962	19,815	86	100	80	20,786
	Corn	1,138	401	283	35,309	47,589	74	132	97	50,471
	Soybeans	1,111	1,656	67	43,450	49,493	88	73	68	56,882
	Total	2,447	2,361	104	95,721	116,897	82	86	75	128,139

*Note: Data include revisions from prior weeks; some regional totals may not add exactly because of rounding. YTD = year-to-date; n/a = not applicable 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.

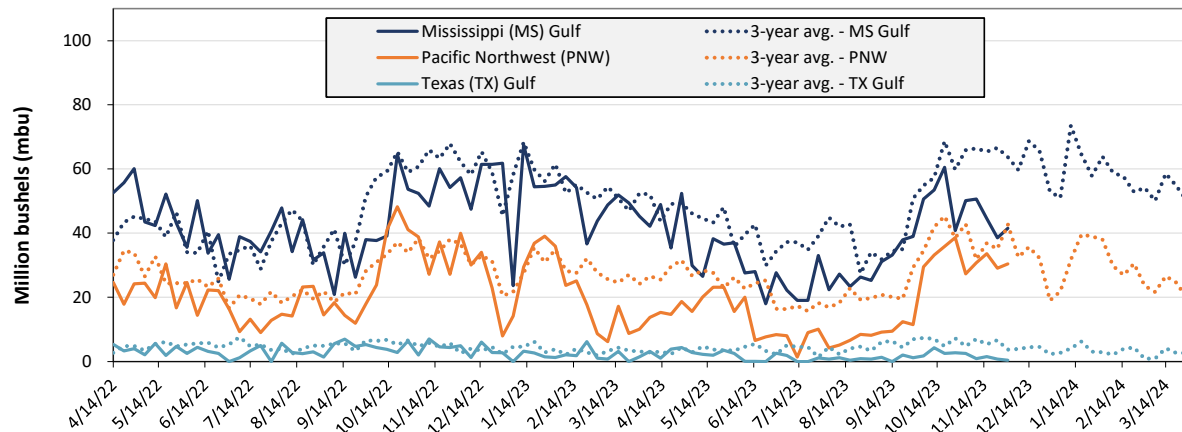
Figure 14. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending November 30: 92.9 mbu of grain inspected, up 6 percent from the previous week, down 25 percent from the same week last year, and down 29 percent from the 3-year average.

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

Figure 15. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 11/30/23 inspections (mbu):	
MS Gulf:	41.6
PNW:	30.4
TX Gulf:	0.3

Percent change from	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 8	down 52	up 7	up 4
Last year (same week)	down 27	down 93	down 33	down 24
3-year average (4-week moving average)	down 37	down 94	down 41	down 17

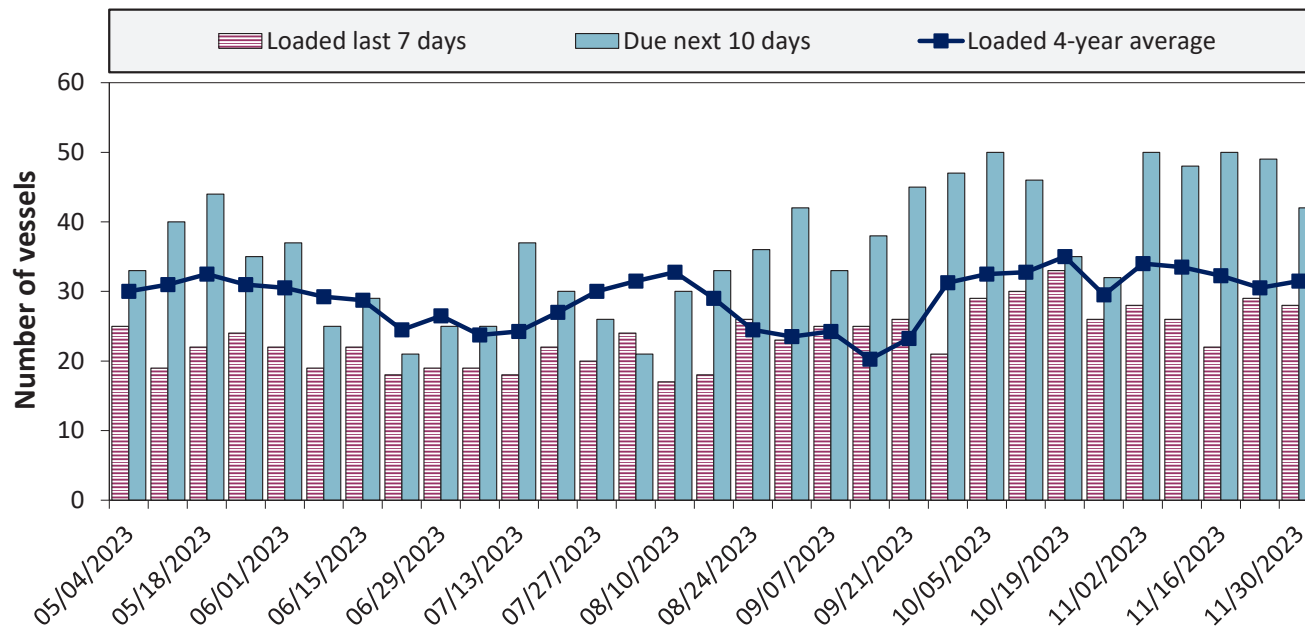
Source: USDA, Federal Grain Inspection Service.

Table 17. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
11/30/2023	23	28	56	12
11/23/2023	22	29	49	n/a
2022 range	(14...61)	(18...39)	(28...62)	(5...23)
2022 average	30	28	44	13

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

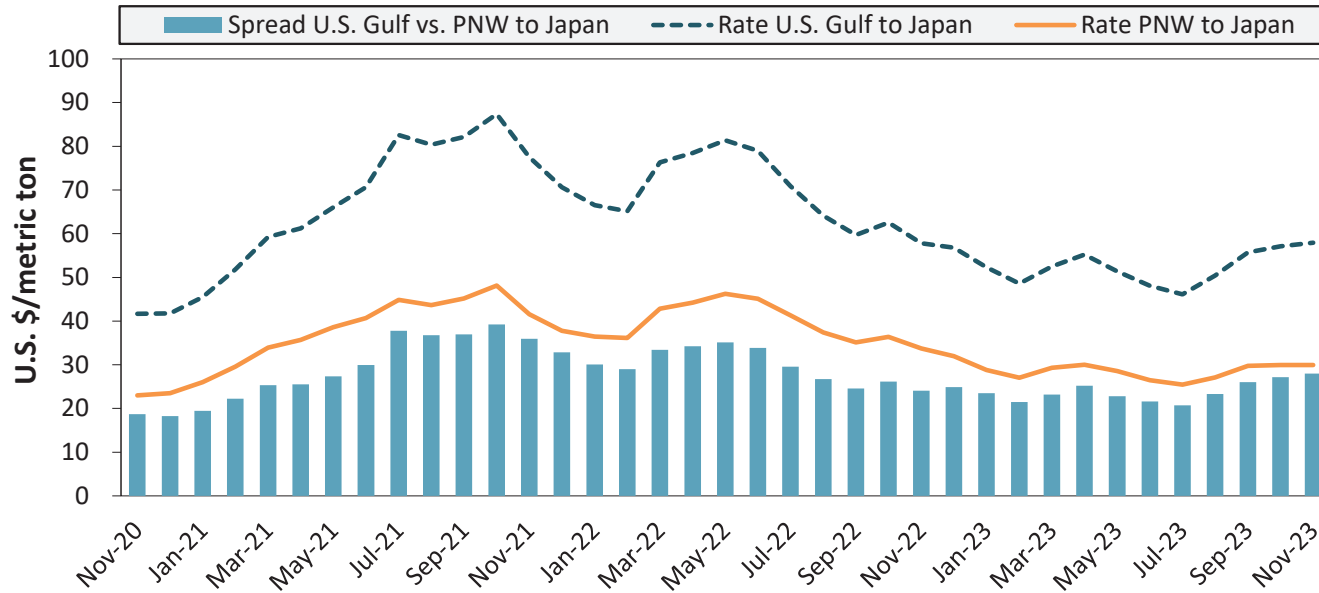
Figure 16. U.S . Gulf vessel loading activity



Week ending 11/30/23, number of vessels	Loaded	Due
Change from last year	7.7%	64.7%
Change from 4-year average	-11.1%	17.3%

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

Figure 17. U.S. Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
November 2023	\$57.13	\$29.94	\$27.19
Change from November 2022	0.0%	-11.3%	16.3%
Change from 4-year average	3.4%	-3.1%	11.4%

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

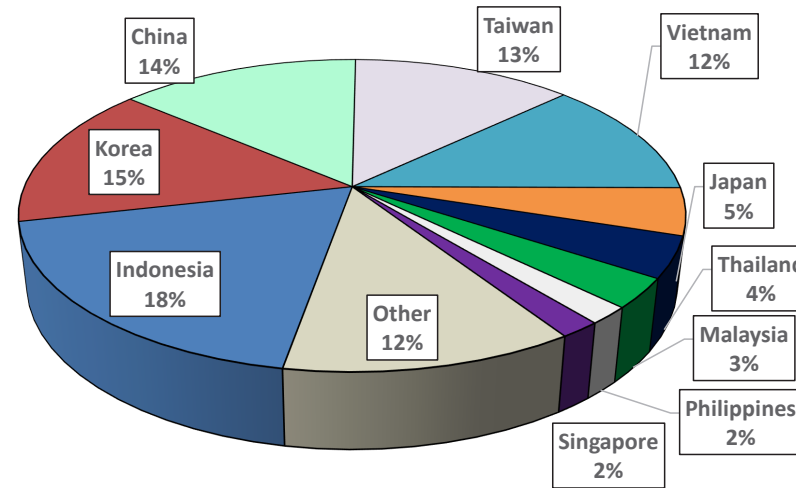
Table 18. Ocean freight rates for selected shipments, week ending 12/2/2023

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Sep 12, 2023	Oct 1/ Nov 1, 2023	66,000	54.50
U.S. Gulf	China	Heavy grain	Sep 6, 2023	Oct 1/10, 2023	68,000	55.00
U.S. Gulf	Jamaica	Wheat	Nov 2, 2023	Dec 1/10, 2023	9,460	63.50
U.S. Gulf	Colombia	Wheat	Oct 26, 2023	Dec 15/25, 2023	27,500	99.00
U.S. Gulf	Guyana	Wheat	Nov 2, 2023	Dec 1/10, 2023	8,250	84.00
U.S. Gulf	S. Korea	Heavy grain	Oct 10, 2023	Nov 25/Dec 5, 2023	58,000	65.35
U.S. Gulf	S. Korea	Heavy grain	Sep 27, 2023	Oct 25/Nov 5, 2023	57,000	64.85
U.S. Gulf	S. Korea	Heavy grain	Sep 19, 2023	Nov 1/15, 2023	58,000	64.50
U.S. Gulf	S. Korea	Heavy grain	Aug 1, 2023	Oct 1/20, 2023	57,000	58.30
PNW	N. China	Heavy grain	Oct 19, 2023	Nov 16/22, 2023	66,000	28.00
PNW	Thailand	Heavy grain	Oct 20, 2023	Dec 5/15, 2023	66,000	22.50
PNW	Yemen	Wheat	Oct 6, 2023	Nov 5/15, 2023	30,000	74.43
PNW	Yemen	Wheat	Sep 26, 2023	Nov 5/15, 2023	24,740	91.89
WC US	Thailand	Wheat	Nov 9, 2023	Dec 1/10, 2023	60,500	35.25
Brazil	China	Heavy grain	Oct 26, 2023	Dec 1/3, 2023	64,000	39.25

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 2020, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 66 percent of U.S. waterborne grain exports in 2020 went to Asia, of which 14 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

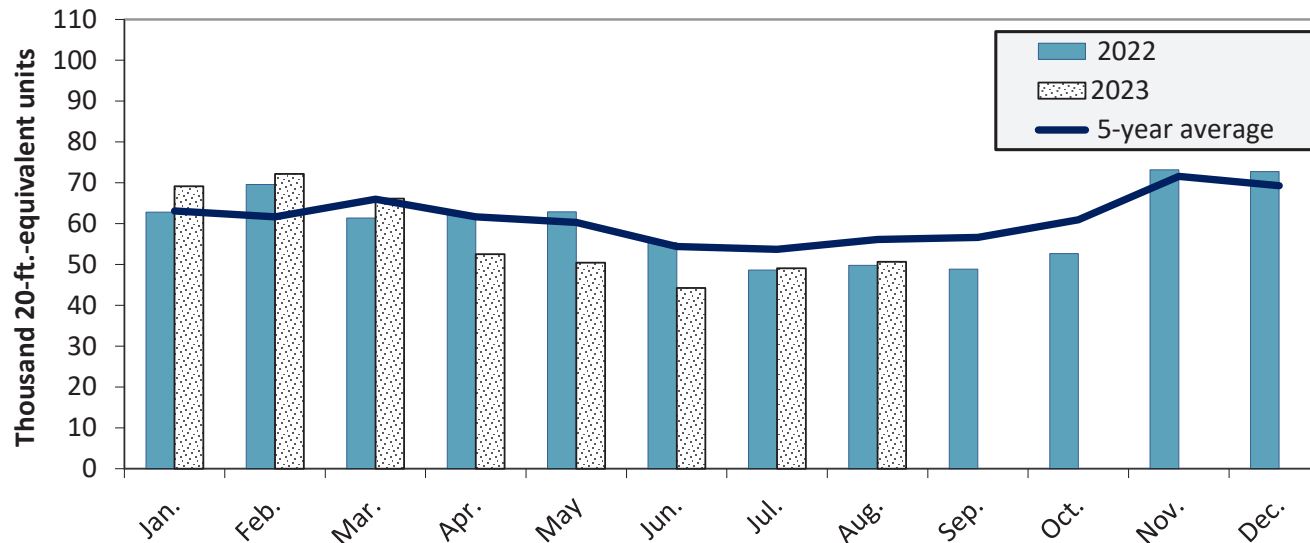
Figure 18. Top 10 destination markets for U.S. containerized grain exports, Jan-Aug 2023



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: Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

Figure 19. Monthly shipments of U.S. containerized grain exports



Containerized grain shipments were up 1.8 percent from last year but down 9.7 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: Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

Title	Name	Email	Phone
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