



Grain Transportation Report

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Diesel Price Falls 8.2 Cents—Largest Drop in 2024. For the week ending December 9, the U.S. average [diesel fuel price](#) decreased 8.2 cents from the previous week, to \$3.458 per gallon—52.9 cents below the same week last year. This week’s price is the lowest since the October 4, 2021, price of \$3.477, several months before the Russian invasion of Ukraine. This week’s decline is the largest since the 9.3-cents-per-gallon drop for the week ending December 18, 2023.

Prices fell in all Energy Information Administration (EIA) regions, and the Midwest price fell 9.6 cents per gallon (the second-largest regional drop), to \$3.425 per gallon. The Midwest price is down 47.5 cents from the same time last year.

According to the EIA’s December [Short Term Energy Outlook](#), the diesel price is expected to average \$3.55 per gallon in fourth quarter 2024—down 14 cents from the previous quarter and up 1 cent from EIA’s November forecast. U.S. diesel prices are projected to average \$3.61 per gallon in 2025—down 15 cents from EIA’s forecast of \$3.76 per gallon for 2024’s average price.

Barge Shipping on Upper Mississippi River Pauses for Winter. On December 1, the last barge of the year departed Lock and Dam 2 in Hastings, MN, [ending the 2024 navigation](#) season on the Upper Mississippi River (UMR).

Although navigation has ended, several maintenance projects are scheduled in the U.S. Army Corps of Engineers’ St. Paul District: at

Locks and Dams 7 and 9, a miter gate anchorage bar replacement; at Lock and Dam 2, guidewall repairs; and at Locks and Dams 5 and 5A, gate maintenance.

Barge traffic on the UMR stops for winter around the last week of November or the first week of December when ice starts to form, especially on Lake Pepin, the widest part of the river where the current is slower. The navigation season will open again in spring 2025. In 2024, UMR navigation season opened on March 17.

FMC Requests More Information on Container-Vessel-Sharing Agreement. The Federal Maritime Commission (FMC) [has issued](#) a request for additional information (RFAI) to determine the potential competitive impacts of a global operational alliance of three container shipping companies: Ocean Network Express (ONE), Hyundai Merchant Marine (HMM), and Yang Ming Marine Transportation (Yang Ming).

In the absence of the RFAI, the arrangement would have taken effect today, December 12 ([Grain Transportation Report, November 14, 2024, fourth highlight](#)). Filed with FMC on October 28, 2024, the proposed joint service agreement would authorize the three entities to share vessels and engage in other related activities on a global scale.

FMC will not reconsider the agreement before receiving fully compliant responses to the RFAI. Once responses are deemed complete, FMC has 45 days to review the agreement for competitive and legal concerns, before the

agreement takes effect or FMC issues further requests. A 15-day public comment period will open once the RFAI is published in the *Federal Register* next week.

USACE Seeks Input on Lock Construction in Illinois. The U.S. Army Corps of Engineers (USACE), Rock Island District, [seeks public review](#) of the draft supplemental environmental assessment for the [“LaGrange Lock and Dam 1,200-foot Lock Project,”](#) in Versailles, IL. A public meeting and information session is scheduled on December 11. Comments are due by January 3, 2025.

The district proposes to build an approximately 1,200-foot lock chamber, west of the existing 600-foot lock at LaGrange, as part of USACE’s [Navigation and Ecosystem Sustainability Program](#). The new construction is intended to ease congestion, reduce delays, add redundancy, eliminate double lockages (i.e., splitting a full tow in two segments), and increase safety.

The project encompasses approximately 425.7 acres on the west bank of the Illinois River. In 2023, 5.8 million metric tons of grain moved through LaGrange Lock and Dam.

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 November 28, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 42.11 million metric tons (mmt), up 2 percent from last week and up 17 percent from the same time last year.

Net **corn export sales** for MY 2024/25, were 1.73 mmt, up 63 percent from last week. Net **soybean export sales** were 2.31 mmt, down 7 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.38 mmt, up 3 percent from last week.

Rail

U.S. Class I railroads originated 21,909 **grain carloads** during the week ending November 30. This was a 24-percent decrease from the previous week, 21 percent fewer than last year, and 23 percent fewer than the 3-year average.

Average December **shuttle secondary railcar bids/offers** (per car) were \$22 above tariff for the week ending December 5. This was \$47 more than last week and \$49 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$63 below tariff. This was \$54 less than last week and \$313 lower than this week last year.

Barge

For the week ending December 7, **barged grain movements** totaled 728,000 tons. This was 8 percent less than the previous week and 20 percent more than the same period last year.

For the week ending December 7, 493 grain barges **moved down river**—63 fewer than last week. There were 868 grain barges **unloaded** in the New Orleans region, 12 percent fewer than last week.

Ocean

For the week ending December 5, 33 **oceangoing grain vessels** were loaded in the Gulf—unchanged from the same period last year. Within the next 10 days (starting December 6), 48 vessels were expected to be loaded—8 percent fewer than the same period last year.

As of December 5, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$46.00. The rate from the Pacific Northwest to Japan was \$27.75 per mt.

Fuel

For the week ending December 9, the U.S. average **diesel price** decreased 8.2 cents from the previous week, to \$3.458 per gallon—52.9 cents below the same week last year.



U.S. and Brazilian Soybean Landed Costs Fell From Second to Third Quarter 2024

The world's two leading producers and exporters of soybeans compete for the same overseas markets. For both the United States and Brazil, the competitiveness of soybean exports depends on low transportation and landed costs (i.e., transportation costs plus farm values) to the key destinations of China and Europe. This article compares quarterly and yearly changes in the costs of moving soybeans from the United States and Brazil to Shanghai, China ([table 1](#)), and to Hamburg, Germany ([table 2](#)).

Quarter-to-Quarter Transportation Costs. From second quarter 2024 to third quarter 2024 (quarter to quarter), total transportation costs for exporting U.S. soybeans to China rose for routes from the U.S. Gulf, but fell for routes from the Pacific Northwest (PNW) ([table 1](#)). Transportation costs also rose for shipping to Germany from the U.S. Gulf ([table 2](#)). Brazil's soybean transportation costs fell for shipments to both China and Germany because of lower truck rates.

The costs of shipping from the U.S. Gulf to China and Germany rose with climbing truck and barge rates. Truck rates were up partly in response to higher demand for trucking services ([Grain Truck and Ocean Rates Advisory](#)). Barge rates rose as rising export sales elevated barged grain movements. In addition, flooding prompted lock closures on the

Mississippi River in July, quickly followed by drought that led to draft and tow restrictions from mid-August to mid-September ([Grain Transportation Report, October 24, 2024](#)).

For shipments from the PNW to China, the fall in ocean and rail rates (public tariff, plus the fuel surcharge) exceeded the rise in truck rates, causing transportation costs to fall.

Year-to-Year Transportation Costs. From third quarter 2023 to third quarter 2024 (year to year), transportation costs rose in the United States and fell in Brazil. In the United States, higher truck, barge, and ocean freight rates pushed up total transportation costs for shipments to China and Germany. In Brazil, lower truck and ocean freight rates pushed down total transportation costs for shipments destined to China and Europe.

Quarter-to-Quarter Landed Costs. Quarter to quarter, landed costs fell in the United States and Brazil. For shipments from the U.S. Gulf, lower farm values caused landed costs to fall. For shipments from the PNW, decreases in both transportation costs and farm values precipitated declining landed costs. For shipments from Brazil, drops in both transportation costs and farm values contributed to falling landed costs.

For U.S. shipments to China, transportation costs accounted for 22-24 percent of third-quarter U.S. landed costs ([table 1](#)). For

shipments to Germany, that share was 17-18 percent ([table 2](#)). For Brazilian shipments to both China and Germany, transportation costs were 19-24 percent of total third-quarter Brazilian landed costs ([tables 1 and 2](#)).

Year-to-Year Landed Costs. Year to year, landed costs fell in both countries. For exports from the United States, the decrease reflected lower soybean farm values. For exports from Brazil, lower landed costs reflected lower transportation costs and lower farm values.

U.S. Exports to China. According to USDA/Foreign Agricultural Service's Global Agricultural Trade System data, in third quarter 2024, the United States exported 1.31 million metric tons (mmt) of soybeans to China—up 38 percent from the previous quarter and down 14 percent from third quarter 2023.

Total U.S. soybean exports are projected at 49.67 mmt in marketing year (MY) 2024/25, up from 46.13 mmt in MY 2023/24, according to USDA's December [World Agricultural Supply and Demand Estimates report](#). On the other hand, Brazil is projected to export 105.50 mmt in MY 2024/25, up from 104.17 mmt in MY 2023/24. For more on soybean transportation in Brazil, see the quarterly [Brazil Soybean Transportation](#) report.

Surajudeen.Olowlayemo@usda.gov

Table 1. Quarterly costs of transporting soybeans from United States and Brazil to Shanghai, China

Route	Cost	2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change		2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change			
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.		
		Minneapolis, MN						Davenport, IA					
		--\$/mt--						--\$/mt--					
United States via U.S. Gulf	Truck	14.75	16.47	17.67	19.80	7.29	14.75	16.47	17.67	19.80	7.29		
	Rail	-	-	-	-	-	-	-	-	-	-		
	Barge	37.80	24.29	39.70	5.03	63.44	30.79	19.18	32.08	4.19	67.26		
	Ocean	50.07	59.66	56.72	13.28	-4.93	50.07	59.66	56.72	13.28	-4.93		
	Total transportation	102.62	100.42	114.09	11.18	13.61	95.61	95.31	106.47	11.36	11.71		
	Farm value	500.94	417.65	377.85	-24.57	-9.53	513.19	437.25	383.36	-25.30	-12.32		
	Landed cost	603.56	518.07	491.94	-18.49	-5.04	608.80	532.56	489.83	-19.54	-8.02		
	Transport % of landed cost	17.00	19.38	23.19	6.19	3.81	15.70	17.90	21.74	6.03	3.84		
Route	Cost	2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change		2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change			
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.		
		Fargo, ND						Sioux Falls, SD					
		--\$/mt--						--\$/mt--					
United States via PNW	Truck	14.75	16.47	17.67	19.80	7.29	14.75	16.47	17.67	19.80	7.29		
	Rail	65.02	64.86	63.52	-2.31	-2.07	66.31	66.22	64.77	-2.32	-2.19		
	Ocean	26.93	31.77	30.23	12.25	-4.85	26.93	31.77	30.23	12.25	-4.85		
	Total transportation	106.70	113.10	111.42	4.42	-1.49	107.99	114.46	112.67	4.33	-1.56		
	Farm value	471.54	400.51	362.78	-23.06	-9.42	498.49	420.10	369.76	-25.82	-11.98		
	Landed cost	578.24	513.61	474.20	-17.99	-7.67	606.48	534.56	482.43	-20.45	-9.75		
	Transport % of landed cost	18.45	22.02	23.50	5.04	1.48	17.81	21.41	23.35	5.55	1.94		
	Route	Cost	2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change		2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change		
Yr. to yr.						Qtr. to qtr.	Yr. to yr.				Qtr. to qtr.		
North MT - Santos						South GO - Paranagua							
--\$/mt--						--\$/mt--							
Brazil	Truck	113.56	91.10	82.31	-27.52	-9.65	67.69	53.05	48.80	-27.91	-8.01		
	Ocean	37.00	33.30	36.00	-2.70	8.11	37.50	34.80	37.50	0.00	7.76		
	Total transportation	150.56	124.40	118.31	-21.42	-4.90	105.19	87.85	86.30	-17.96	-1.76		
	Farm Value	399.94	366.79	366.60	-8.34	-0.05	406.45	367.50	360.62	-11.28	-1.87		
	Landed Cost	550.50	491.19	484.91	-11.91	-1.28	511.64	455.35	446.92	-12.65	-1.85		
	Transport % of landed cost	27.35	25.33	24.40	-2.95	-0.93	20.56	19.29	19.31	-1.25	0.02		

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Second quarter rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation cost plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding. Source: USDA, Agricultural Marketing Service.

Table 2. Quarterly costs of transporting soybeans from United States and Brazil to Hamburg, Germany

Route	Cost	2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change		2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
--\$/mt--											
United States via U.S. Gulf	Truck	14.75	16.47	17.67	19.80	7.29	14.75	16.47	17.67	19.80	7.29
	Rail	-	-	-	-	-	-	-	-	-	-
	Barge	37.80	24.29	39.70	5.03	63.44	30.79	19.18	32.08	4.19	67.26
	Ocean	25.87	27.94	26.41	2.09	-5.48	25.87	27.94	26.41	2.09	-5.48
	Total transportation	78.42	68.70	83.78	6.83	21.95	71.41	63.59	76.16	6.65	19.77
	Farm value	509.94	417.65	377.85	-25.90	-9.53	513.19	437.25	383.36	-25.30	-12.32
	Landed cost	588.36	486.35	461.63	-21.54	-5.08	584.60	500.84	459.52	-21.40	-8.25
	Transport % of landed cost	13.33	14.13	18.15	4.82	4.02	12.22	12.70	16.57	4.36	3.88
Route	Cost	2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change		2023 3rd qtr.	2024 2nd qtr.	2024 3rd qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
--\$/mt--											
Brazil	Truck	113.56	91.10	82.31	-27.52	-9.65	67.69	53.05	48.80	-27.91	-8.01
	Ocean	35.00	31.30	33.80	-3.43	7.99	34.20	31.00	33.50	-2.05	8.06
	Total transportation	148.56	122.40	116.11	-21.84	-5.14	101.89	84.05	82.30	-19.23	-2.08
	Farm Value	399.94	366.79	366.60	-8.34	-0.05	406.45	367.50	360.62	-11.28	-1.87
	Landed Cost	548.50	489.19	482.71	-11.99	-1.32	508.34	451.55	442.92	-12.87	-1.91
	Transport % of landed cost	27.08	25.02	24.05	-3.03	-0.97	20.04	18.61	18.58	-1.46	-0.03

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Second quarter rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed cost are transportation cost plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding. Source: USDA, Agricultural Marketing Service.

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

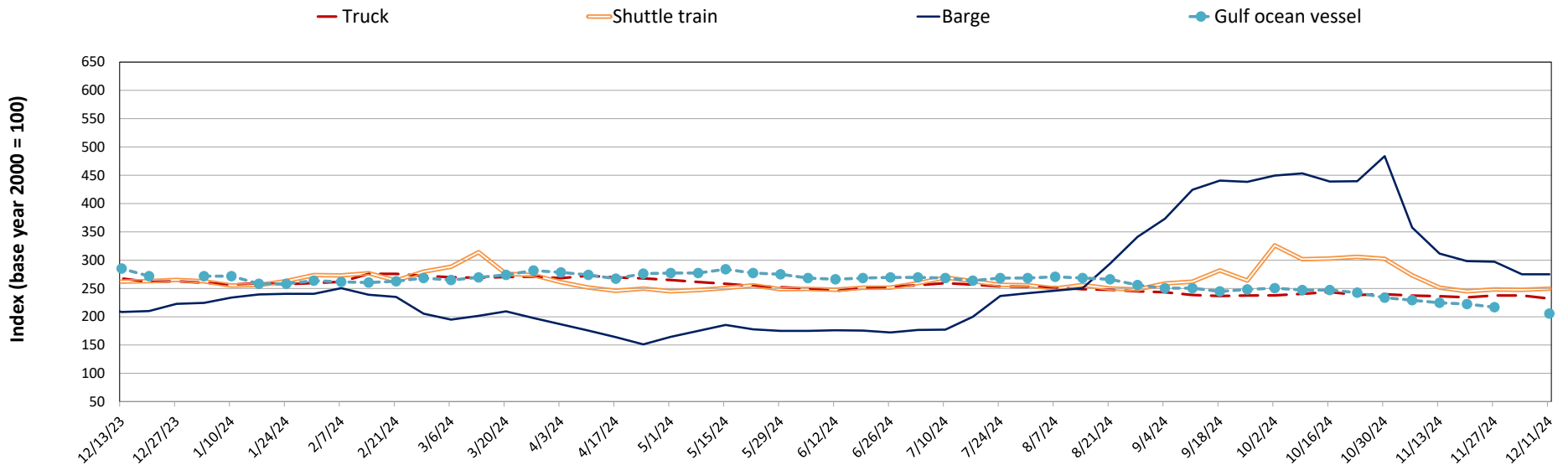
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
12/11/24	232	323	250	275	206	197
12/04/24	238	326	248	275	n/a	n/a
12/13/23	268	342	262	208	285	234

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.

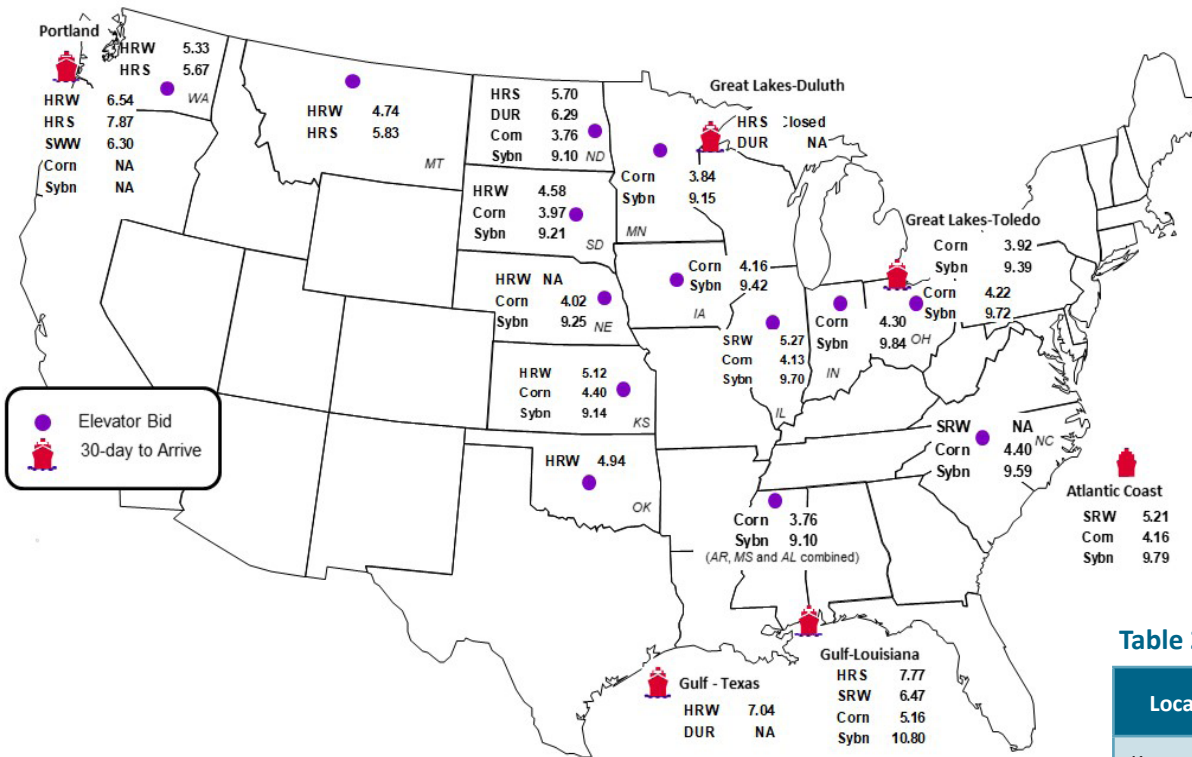
Figure 1. Grain transportation cost indicators as of week ending 12/11/24



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	12/6/2024	11/29/2024
Corn	IL-Gulf	-1.03	-0.98
Corn	NE-Gulf	-1.14	-1.09
Soybean	IA-Gulf	-1.38	-1.45
HRW	KS-Gulf	-1.92	-1.88
HRS	ND-Portland	-2.17	-2.16

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	12/6/2024	Week ago 11/29/2024	Year ago 12/08/2023
Kansas City	Wheat	Dec	5.522	5.440	6.514
Minneapolis	Wheat	Dec	5.684	5.724	7.294
Chicago	Wheat	Dec	5.562	5.494	6.252
Chicago	Corn	Dec	4.400	4.340	4.862
Chicago	Soybean	Jan	9.946	9.790	13.214

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.

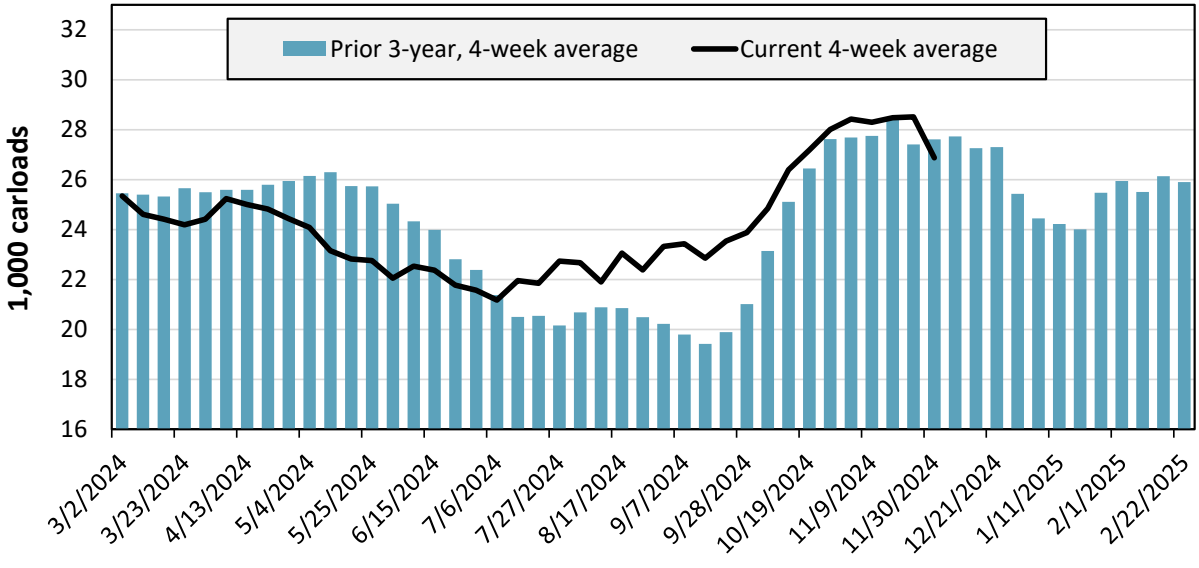
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 11/30/2024	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,097	2,825	9,067	5,601	1,945	1,374	21,909
This week last year	1,783	3,405	12,441	5,796	3,025	1,331	27,781
2024 YTD	80,769	130,948	514,008	253,746	130,264	52,680	1,162,415
2023 YTD	84,090	118,032	445,804	252,230	118,109	61,270	1,079,535
2024 YTD as % of 2023 YTD	96	111	115	101	110	86	108
Last 4 weeks as % of 2023	88	117	94	112	96	128	102
Last 4 weeks as % of 3-yr. avg.	85	118	92	105	92	100	97
Total 2023	91,152	128,037	491,129	273,672	129,336	65,174	1,178,500

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 30, grain carloads were down 6 percent from the previous week, up 2 percent from last year, and down 3 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: 11/29/2024		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	24.1	28.6	19.9	17.4	7.4	36.8	52.1	26.6
	Average over last 4 weeks	33.1	29.9	17.5	15.7	7.1	23.2	43.9	24.3
	Average of same 4 weeks last year	20.9	44.0	8.2	14.6	9.8	50.1	11.2	22.7
Grain unit train speeds (miles per hour)	This week	21.9	19.4	25.5	21.9	23.5	21.4	22.7	22.3
	Average over last 4 weeks	22.3	18.7	25.2	21.6	23.9	20.7	22.2	22.1
	Average of same 4 weeks last year	23.5	16.9	25.4	24.3	24.5	23.3	27.8	23.6

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 Canadian Pacific Kansas City, 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

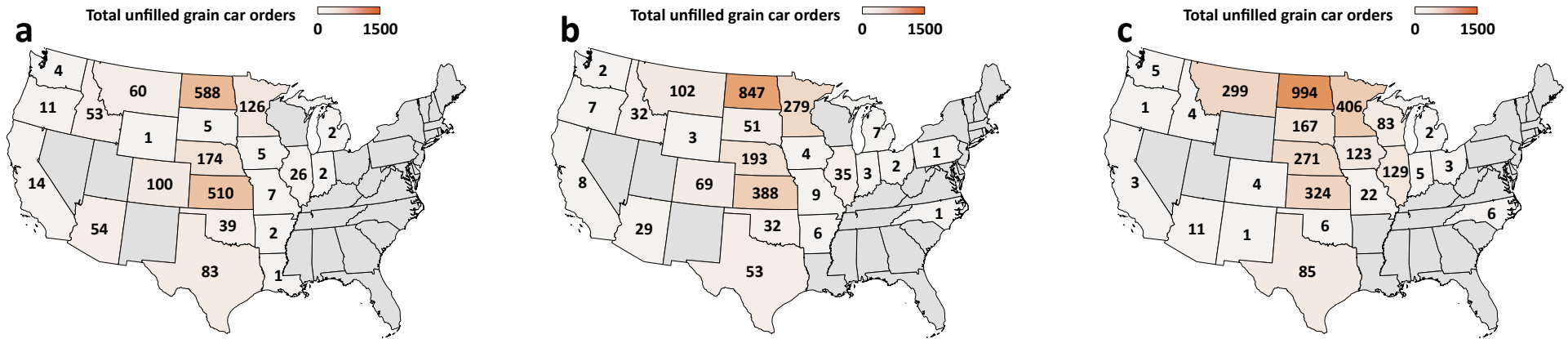
For the week ending: 11/29/2024		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Empty grain cars not moved in over 48 hours (number)	This week	34	5	452	73	5	77	78	726
	Average over last 4 weeks	26	7	402	89	7	55	99	686
	Average of same 4 weeks last year	24	14	376	55	5	70	11	555
Loaded grain cars not moved in over 48 hours (number)	This week	53	168	361	92	3	236	94	1,007
	Average over last 4 weeks	57	209	344	89	3	130	44	876
	Average of same 4 weeks last year	35	233	554	81	3	351	12	1,268
Grain unit trains held (number)	This week	2	0	21	6	0	1	7	37
	Average over last 4 weeks	1	0	16	6	0	4	7	34
	Average of same 4 weeks last year	1	6	9	5	0	3	5	28
Unfilled manifest grain car orders (number)	This week	4	0	248	1,054	0	561	0	1,867
	Average over last 4 weeks	8	10	242	834	0	1,067	25	2,185
	Average of same 4 weeks last year	5	19	2,745	127	0	58	0	2,953

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 Canadian Pacific Kansas City, 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](#).

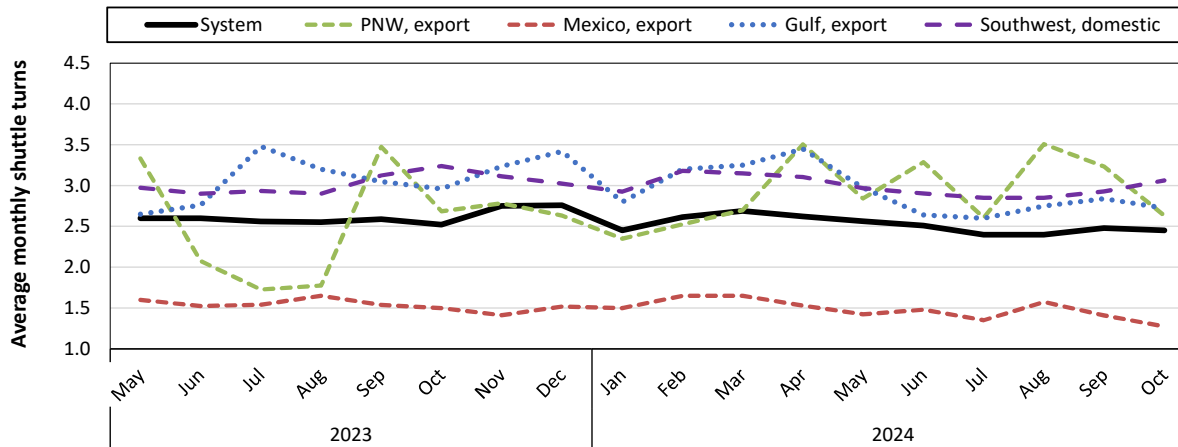
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 11/29/2024 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



Note: Unfilled grain car orders for Kansas City Southern Railway (KCS) are not included because those metrics are not reported at the State level.
 Source: Surface Transportation Board. Map credits: Bing, GeoNames, Microsoft, TomTom.

Figure 5. Average monthly turns for grain shuttle trains, by region

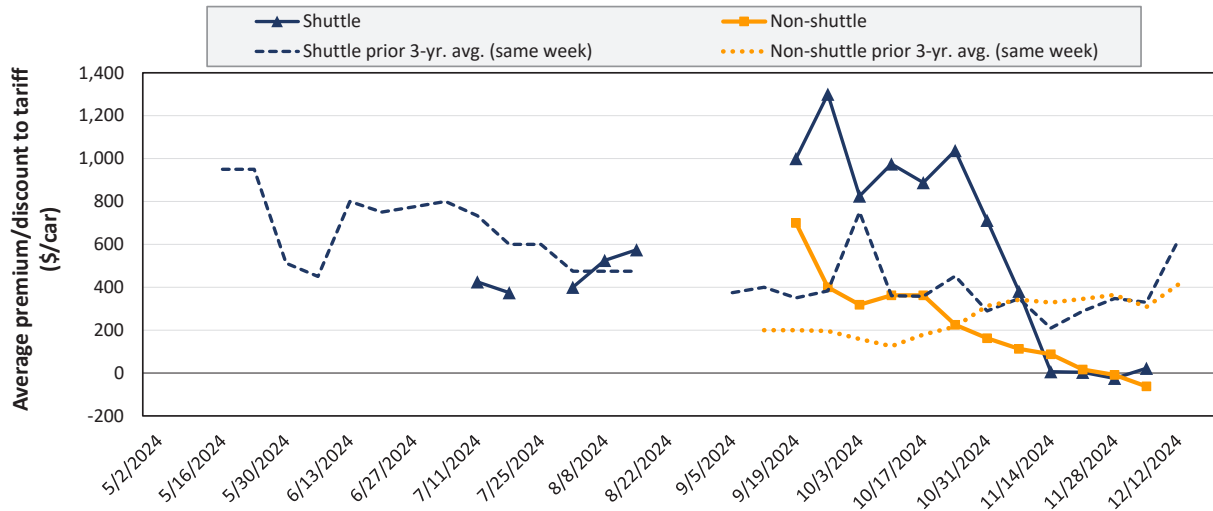


Average monthly systemwide grain shuttle turns for October 2024 were 2.45. By destination region, average monthly grain shuttle turns were 2.63 to PNW, 1.28 to Mexico, 2.73 to the Gulf, and 3.06 to the Southwest.

Note: 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 Canadian Pacific Kansas City (CPKC). CPKC only reports values for the Pacific Northwest (PNW). Regions are not standardized and vary across railroads. “Southwest” refers to domestic destinations, which include: “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 6. Secondary market bids/offers for railcars to be delivered in December 2024



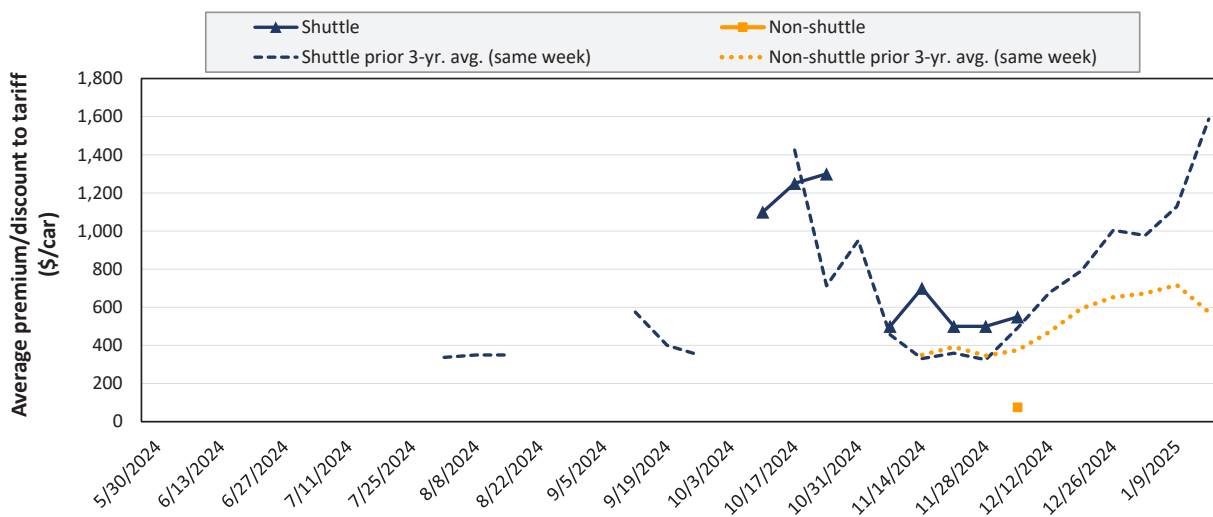
Average non-shuttle bids/offers fell \$54 this week, and are \$763 below the peak.

Average shuttle bids/offers rose \$47 this week and are \$1,278 below the peak.

	12/5/2024	BNSF	UP
Non-Shuttle		-\$25	-\$100
Shuttle		\$281	-\$238

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 January 2025



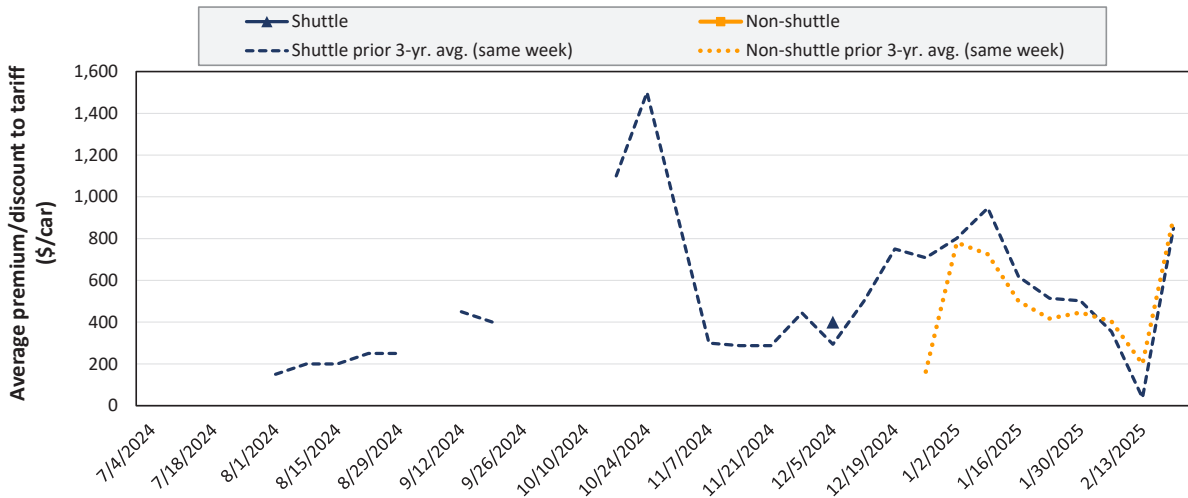
There were no non-shuttle bids/offers last week. Average non-shuttle bids/offers this week are at the peak.

Average shuttle bids/offers rose \$50 this week and are \$750 below the peak.

	12/5/2024	BNSF	UP
Non-Shuttle		\$150	\$0
Shuttle		\$550	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 8. Secondary market bids/offers for railcars to be delivered in February 2025



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

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

12/5/2024	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	\$400	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: 12/5/2024		Delivery period					
		Dec-24	Jan-25	Feb-25	Mar-25	Apr-25	May-25
Non-shuttle	BNSF	-25	150	n/a	n/a	n/a	n/a
	Change from last week	-83	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	-275	-75	n/a	n/a	n/a	n/a
	UP	-100	0	n/a	n/a	n/a	n/a
	Change from last week	-25	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	n/a	0	n/a	n/a	n/a	n/a
Shuttle	BNSF	281	550	400	n/a	n/a	n/a
	Change from last week	143	50	n/a	n/a	n/a	n/a
	Change from same week 2023	-135	17	n/a	n/a	n/a	n/a
	UP	-238	n/a	n/a	n/a	n/a	n/a
	Change from last week	-50	n/a	n/a	n/a	n/a	n/a
	Change from same week 2023	38	n/a	n/a	n/a	n/a	n/a
	CPKC	50	n/a	0	0	n/a	n/a
	Change from last week	-250	n/a	n/a	n/a	n/a	n/a
Change from same week 2023	-50	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 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	\$152	\$51.07	\$1.39	18
	Grand Forks, ND	Duluth-Superior, MN	\$3,862	\$27	\$38.62	\$1.05	-5
	Wichita, KS	Los Angeles, CA	\$7,020	\$138	\$71.08	\$1.93	-9
	Wichita, KS	New Orleans, LA	\$4,425	\$267	\$46.59	\$1.27	-11
	Sioux Falls, SD	Galveston-Houston, TX	\$6,966	\$113	\$70.30	\$1.91	-6
	Colby, KS	Galveston-Houston, TX	\$4,675	\$293	\$49.33	\$1.34	-11
	Amarillo, TX	Los Angeles, CA	\$5,585	\$407	\$59.50	\$1.62	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$5,385	\$302	\$56.47	\$1.43	2
	Toledo, OH	Raleigh, NC	\$8,877	\$0	\$88.15	\$2.24	0
	Des Moines, IA	Davenport, IA	\$3,619	\$64	\$36.57	\$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	\$188	\$48.59	\$1.23	3
	Des Moines, IA	Los Angeles, CA	\$6,585	\$547	\$70.82	\$1.80	-1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,456	\$431	\$38.60	\$1.05	-0
	Toledo, OH	Huntsville, AL	\$7,324	\$0	\$72.73	\$1.98	1
	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	\$302	\$55.83	\$1.52	2

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 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	\$79	\$43.91	\$1.20	-8
	Wichita, KS	Galveston-Houston, TX	\$4,411	\$62	\$44.42	\$1.21	-7
	Chicago, IL	Albany, NY	\$7,413	\$0	\$73.61	\$2.00	0
	Grand Forks, ND	Portland, OR	\$6,001	\$137	\$60.95	\$1.66	-8
	Grand Forks, ND	Galveston-Houston, TX	\$5,446	\$140	\$55.47	\$1.51	-8
	Garden City, KS	Portland, OR	\$6,695	\$175	\$68.23	\$1.86	-
Corn	Minneapolis, MN	Portland, OR	\$5,510	\$167	\$56.37	\$1.43	-9
	Sioux Falls, SD	Tacoma, WA	\$5,470	\$153	\$55.83	\$1.42	-9
	Champaign-Urbana, IL	New Orleans, LA	\$4,625	\$302	\$48.93	\$1.24	2
	Lincoln, NE	Galveston-Houston, TX	\$4,860	\$89	\$49.15	\$1.25	1
	Des Moines, IA	Amarillo, TX	\$5,125	\$236	\$53.24	\$1.35	2
	Minneapolis, MN	Tacoma, WA	\$5,510	\$165	\$56.36	\$1.43	-9
	Council Bluffs, IA	Stockton, CA	\$6,080	\$171	\$62.07	\$1.58	-2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,185	\$153	\$62.93	\$1.71	-8
	Minneapolis, MN	Portland, OR	\$6,235	\$167	\$63.57	\$1.73	-8
	Fargo, ND	Tacoma, WA	\$6,085	\$136	\$61.77	\$1.68	-7
	Council Bluffs, IA	New Orleans, LA	\$5,550	\$348	\$58.57	\$1.59	1
	Toledo, OH	Huntsville, AL	\$5,564	\$0	\$55.25	\$1.50	1
	Grand Island, NE	Portland, OR	\$6,185	\$491	\$66.30	\$1.80	-0

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.

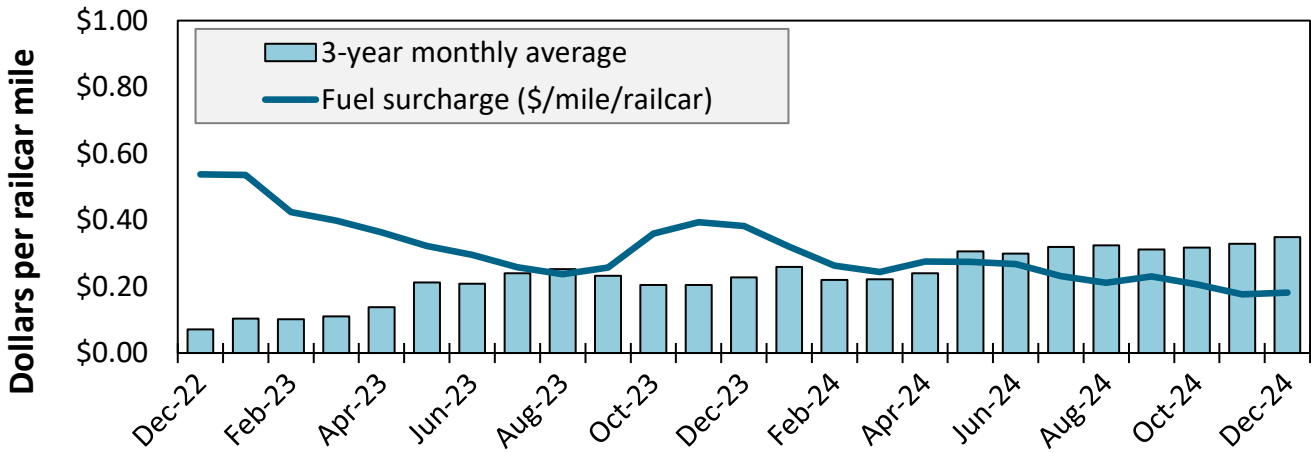
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, December 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	\$4,675	\$46.01	\$1.17	0.3	0.1
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	\$5,552	\$54.64	\$1.39	0.2	-3.2
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	\$6,076	\$59.80	\$1.52	0.2	-3.4
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,459	\$53.73	\$1.36	0.2	-3.1
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	\$5,672	\$55.82	\$1.42	0.2	-3.2
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$5,068	\$49.88	\$1.27	0.0	0.7
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$5,203	\$51.21	\$1.30	0.0	0.5
Soybeans	Superior, NE	El Paso, TX	BNSF	Shuttle	\$5,091	\$50.11	\$1.27	0.2	1.4
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	\$5,552	\$54.64	\$1.49	0.2	-3.2
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$5,423	\$53.37	\$1.45	0.2	-4.4
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$6,615	\$65.11	\$1.77	0.0	0.8
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$5,424	\$53.38	\$1.45	0.2	-4.5
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,459	\$53.73	\$1.46	0.2	-3.1
Wheat	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$6,717	\$66.11	\$1.80	0.0	0.6
	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,980	\$39.17	\$1.07	0.3	-14.1
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$3,562	\$35.06	\$0.95	0.3	-15.1
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,799	\$47.23	\$1.29	0.0	-10.7
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,459	\$53.73	\$1.46	0.2	-3.1
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,586	\$45.14	\$1.23	0.0	-10.7

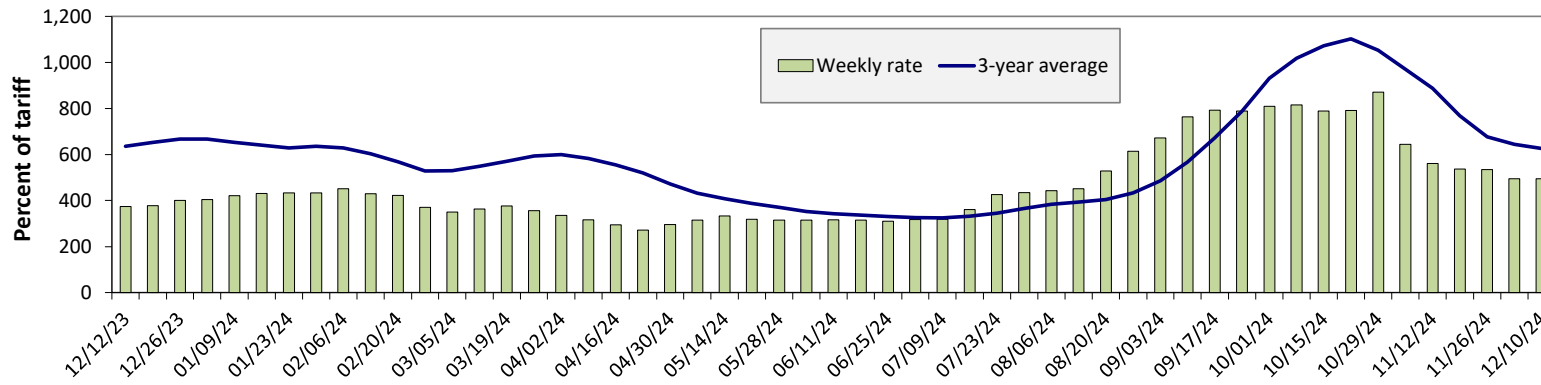
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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 9. Railroad fuel surcharges, North American weighted average



December 2024: \$0.18/mile, unchanged from last month's surcharge of \$0.18/mile; down 20 cents from the December 2023 surcharge of \$0.38/mile; and down 17 cents from the December prior 3-year average of \$0.35/mile.

Figure 10. Illinois River barge freight rate



For the week ending December 10: there is no change from the previous week; 32 percent higher than last year; and 21 percent lower than the 3-year average.

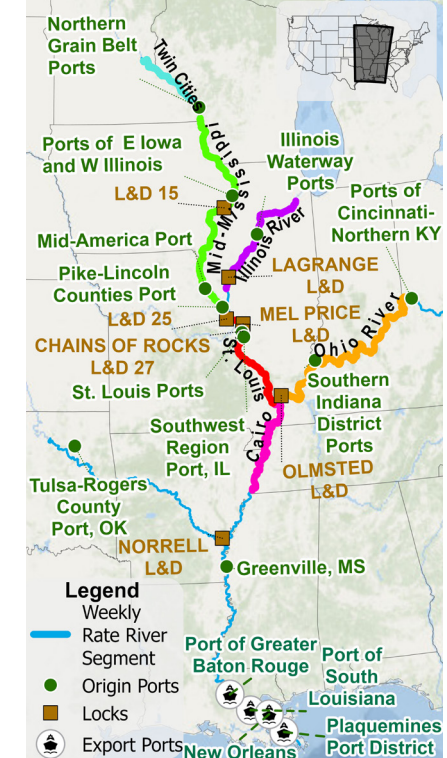
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.
Source: USDA, Agricultural Marketing Service.

Table 9. Weekly barge freight rates: southbound only

Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	12/10/2024	n/a	522	495	392	399	322
	12/3/2024	n/a	525	495	386	397	325
\$/ton	12/10/2024	n/a	27.77	22.97	15.64	18.71	10.11
	12/3/2024	n/a	27.93	22.97	15.40	18.62	10.21
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	n/a	38	32	20	12	15
	3-year avg.	n/a	-15	-21	-29	-34	-34
Rate	January	n/a	n/a	486	379	391	308
	March	n/a	n/a	431	344	363	298

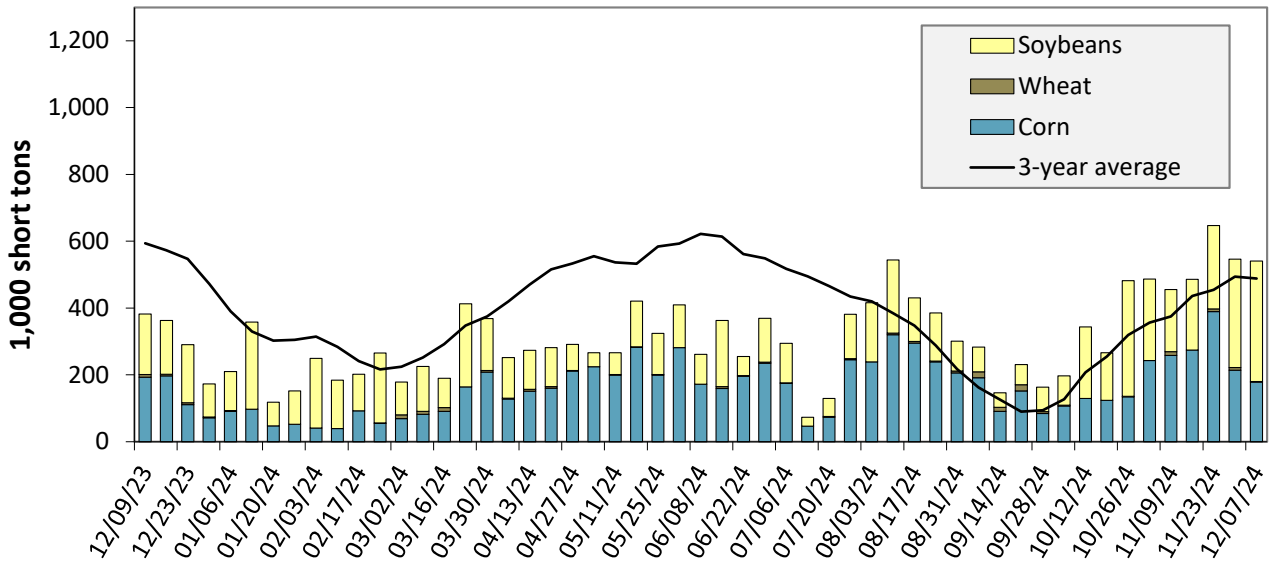
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of \$6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi 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 11. Benchmark tariff rates



Source: USDA, Agricultural Marketing Service.

Figure 12. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending December 7: 42 percent higher than last year and 11 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.

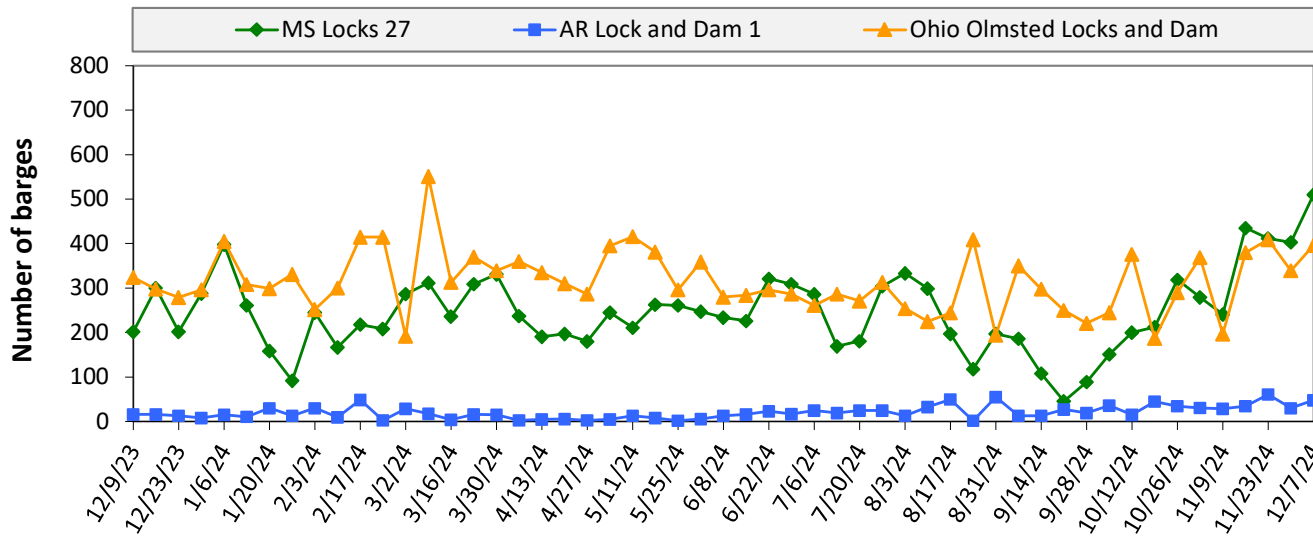
Table 10. Barged grain movements (1,000 tons)

For the week ending 12/07/2024	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	33	0	24	0	57
Mississippi River (Winfield, MO (L25))	81	2	191	0	274
Mississippi River (Alton, IL (L26))	188	2	364	0	554
Mississippi River (Granite City, IL (L27))	178	2	361	0	541
Illinois River (La Grange)	104	0	169	0	272
Ohio River (Olmsted)	47	0	113	7	166
Arkansas River (L1)	0	6	15	0	21
Weekly total - 2024	225	7	489	7	728
Weekly total - 2023	315	18	266	6	605
2024 YTD	13,858	1,491	11,442	192	26,983
2023 YTD	12,126	1,272	11,046	247	24,691
2024 as % of 2023 YTD	114	117	104	78	109
Last 4 weeks as % of 2023	86	64	136	25	107
Total 2023	12,857	1,346	11,824	267	26,294

Note: "Other" refers to oats, barley, 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.

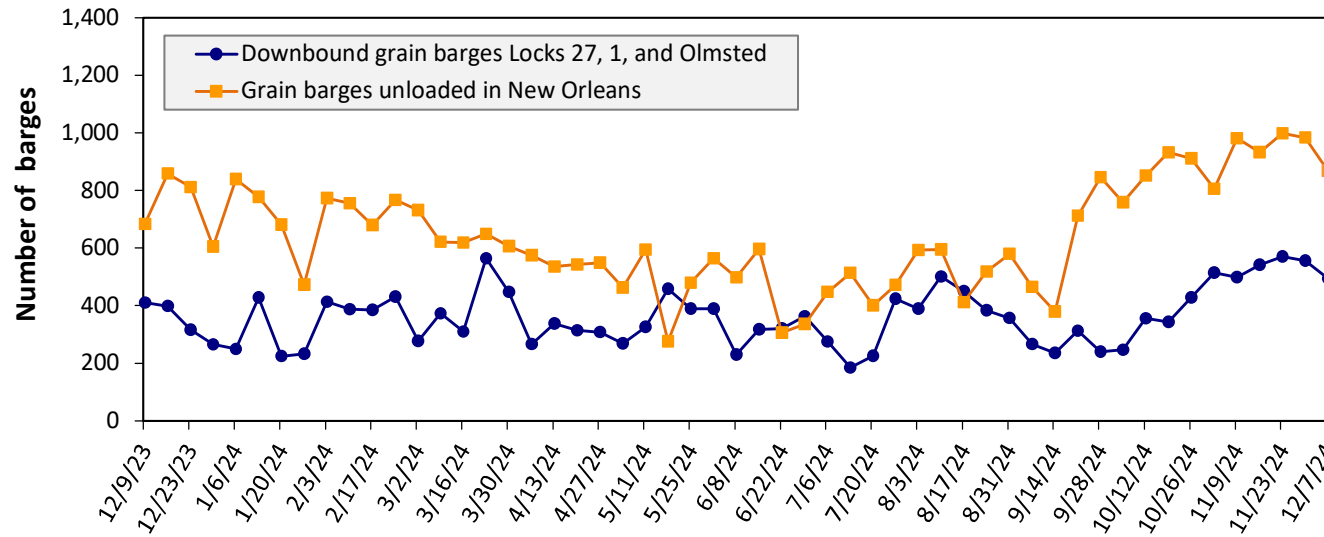
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending December 7: 954 barges transited the locks, 182 barges more than the previous week, and 55 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 14. Grain barges for export in New Orleans region



For the week ending December 7: 493 barges moved down river, 63 fewer than the previous week; 868 grain barges unloaded in the New Orleans Region, 12 percent fewer than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	\$/ton			Current month % change from the same month	
		December 2024	November 2024	December 2023	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$21.58	\$21.56	\$21.79	-0.9	2.1
	Central Ferry, WA/Almota, WA	\$20.68	\$20.66	\$20.92	-1.1	1.8
	Lyons Ferry, WA	\$19.67	\$19.65	\$19.95	-1.4	1.4
	Windust, WA/Lower Monumental, WA	\$18.64	\$18.62	\$18.96	-1.7	1.0
	Sheffler, WA	\$18.61	\$18.59	\$18.93	-1.7	1.0
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$17.41	\$17.39	\$17.78	-2.1	0.4
	Port Kelly, WA/Wallula, WA	\$17.19	\$17.17	\$17.57	-2.1	0.3
	Umatilla, OR	\$17.09	\$17.07	\$17.47	-2.2	0.2
	Boardman, OR/Hogue Warner, OR	\$16.83	\$16.81	\$17.22	-2.2	0.1
	Arlington, OR/Roosevelt, WA	\$16.67	\$16.65	\$17.07	-2.3	0.0
	Biggs, OR	\$15.34	\$15.32	\$15.79	-2.8	-0.8
	The Dalles, OR	\$14.24	\$14.22	\$14.73	-3.3	-1.5

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)

November, 2024	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	260	0	260
Columbia River (Bonneville Lock and Dam (L1))	338	0	338
Monthly total 2024	338	0	338
Monthly total 2023	369	0	369
2024 YTD	3,258	0	3,258
2023 YTD	n/a	n/a	n/a

Note: "Other" refers to corn, soybeans, oats, barley, 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 15. Dam and port locations on Columbia-Snake River



Source: USDA, Agricultural Marketing Service.

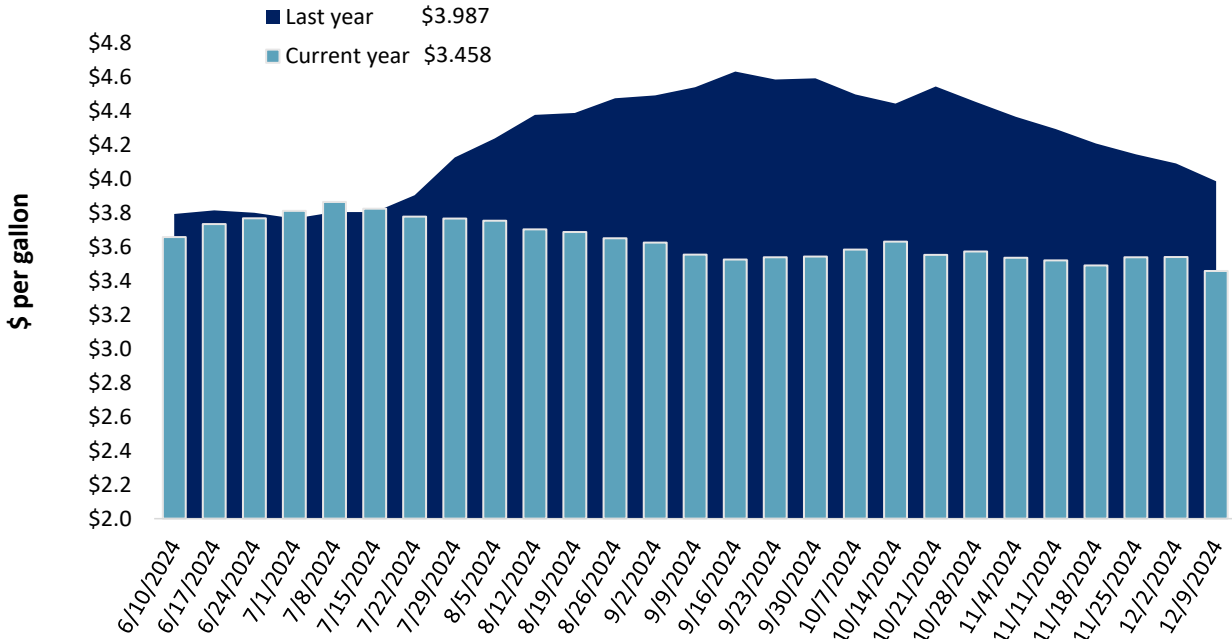
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 12/9/2024 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.535	-0.062	-0.515
	New England	3.755	-0.018	-0.663
	Central Atlantic	3.750	-0.043	-0.656
	Lower Atlantic	3.432	-0.075	-0.448
II	Midwest	3.425	-0.096	-0.475
III	Gulf Coast	3.130	-0.097	-0.510
IV	Rocky Mountain	3.329	-0.102	-0.720
V	West Coast	4.119	-0.045	-0.683
	West Coast less California	3.682	-0.057	-0.628
	California	4.623	-0.029	-0.744
Total	United States	3.458	-0.082	-0.529

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



For the week ending December 9, the U.S. average diesel fuel price decreased 8.2 cents from the previous week to \$3.458 per gallon, 52.9 cents below the same week last year.

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

Table 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 11/28/2024	1,041	817	1,522	1,329	110	4,818	22,808	14,483	42,108
	This week year ago	997	1,221	1,538	1,062	124	4,942	17,040	14,077	36,059
	Last 4 wks. as % of same period 2023/24	104	62	99	119	99	95	130	103	115
Current shipped (cumulative) exports sales	2024/25 YTD	2,591	1,662	3,502	2,789	185	10,728	11,384	21,703	43,815
	2023/24 YTD	1,472	1,743	2,939	1,745	204	8,102	8,707	18,210	35,019
	YTD 2024/25 as % of 2023/24	176	95	119	160	91	132	131	119	125
	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 11/28/2024	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	13,702	12,232	12	17,746
Japan	4,275	3,670	16	9,366
China	26	1,406	-98	8,233
Colombia	2,661	1,967	35	4,383
Korea	879	335	162	1,565
Top 5 importers	21,543	19,610	10	41,293
Total U.S. corn export sales	34,191	25,747	33	51,170
% of YTD current month's export projection	54%	44%	-	-
Change from prior week	1,732	1,289	-	-
Top 5 importers' share of U.S. corn export sales	63%	76%	-	81%
USDA forecast December 2024	62,868	58,220	8	-
Corn use for ethanol USDA forecast, December 2024	139,700	139,141	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 11/28/2024	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	16,483	17,543	-6	28,636
Mexico	2,898	3,003	-3	4,917
Japan	941	1,155	-19	2,231
Egypt	1,437	268	436	2,228
Indonesia	695	566	23	1,910
Top 5 importers	22,453	22,535	-0	39,922
Total U.S. soybean export sales	36,185	32,287	12	51,302
% of YTD current month's export projection	73%	70%	-	-
Change from prior week	2,313	1,405	-	-
Top 5 importers' share of U.S. soybean export sales	62%	70%	-	78%
USDA forecast, December 2024	49,668	46,130	8	-

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 11/28/2024	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	2,914	2,075	40	3,298
Philippines	1,934	1,879	3	2,494
Japan	1,428	1,300	10	2,125
China	139	1,075	-87	1,374
Korea	1,654	932	78	1,274
Taiwan	728	824	-12	921
Nigeria	314	189	66	920
Thailand	610	281	117	552
Colombia	317	193	64	522
Vietnam	321	279	15	313
Top 10 importers	10,360	9,028	15	13,792
Total U.S. wheat export sales	15,546	13,044	19	18,323
% of YTD current month's export projection	67%	68%	-	-
Change from prior week	378	357	-	-
Top 10 importers' share of U.S. wheat export sales	67%	69%	-	75%
USDA forecast, December 2024	23,133	19,241	20	-

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)

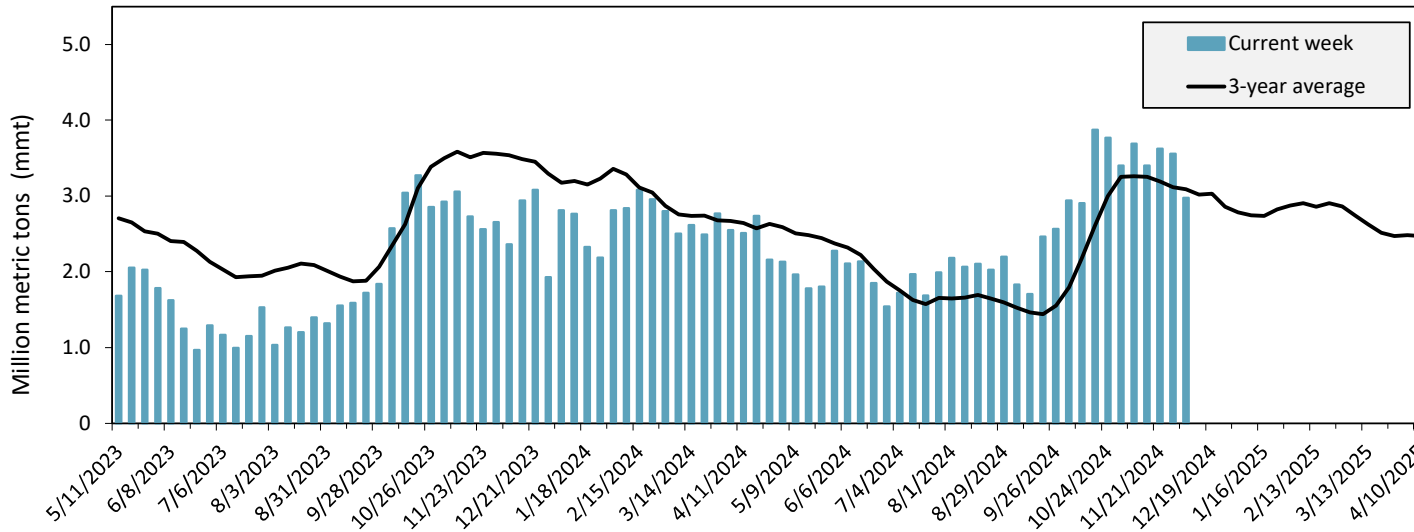
Port regions	Commodity	For the week ending 12/05/2024	Previous week*	Current week as % of previous	2024 YTD*	2023 YTD*	2024 YTD as % of 2023 YTD	Last 4-weeks as % of:		2023 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	318	257	124	12,981	4,594	283	145	262	5,267
	Soybeans	475	474	100	9,350	9,288	101	123	82	10,286
	Wheat	116	132	88	10,675	9,009	119	73	84	9,814
	All grain	979	931	105	34,228	23,130	148	118	102	25,913
Mississippi Gulf	Corn	517	519	100	25,350	21,717	117	159	142	23,630
	Soybeans	954	1,347	71	26,041	24,405	107	166	114	26,878
	Wheat	32	56	58	4,385	3,168	138	143	195	3,335
	All grain	1,503	1,922	78	55,894	49,291	113	164	121	53,843
Texas Gulf	Corn	5	7	73	548	353	155	58	75	397
	Soybeans	0	0	n/a	550	267	206	n/a	150	267
	Wheat	28	73	39	1,728	1,527	113	412	104	1,593
	All grain	35	206	17	6,413	5,308	121	99	93	5,971
Interior	Corn	209	140	149	12,641	9,681	131	87	97	10,474
	Soybeans	181	183	99	7,313	5,929	123	124	131	6,508
	Wheat	49	26	187	2,729	2,114	129	137	96	2,281
	All grain	447	358	125	22,938	17,915	128	105	110	19,467
Great Lakes	Corn	0	23	0	193	57	339	319	699	57
	Soybeans	0	0	n/a	108	192	56	1	0	192
	Wheat	0	10	0	531	442	120	27	39	581
	All grain	0	33	0	832	691	120	71	46	831
Atlantic	Corn	0	2	0	381	130	293	151	169	166
	Soybeans	12	61	19	952	1,890	50	81	68	2,058
	Wheat	0	1	n/a	72	101	71	n/a	59	101
	All grain	12	64	18	1,405	2,121	66	83	69	2,325
All Regions	Corn	1,050	949	111	52,094	36,546	143	131	143	40,004
	Soybeans	1,622	2,110	77	44,734	42,240	106	146	102	46,459
	Wheat	227	299	76	20,120	16,394	123	96	94	17,738
	All grain	2,976	3,557	84	122,131	98,771	124	131	110	108,664

*Note: Data include revisions from prior weeks; "All grain" includes corn, soybeans, wheat, sorghum, oats, barley, rye, sunflower, flaxseed, and mixed grains; "All regions" includes listed regions and other minor regions not listed; YTD= year-to-date; n/a = not available or no change.

Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

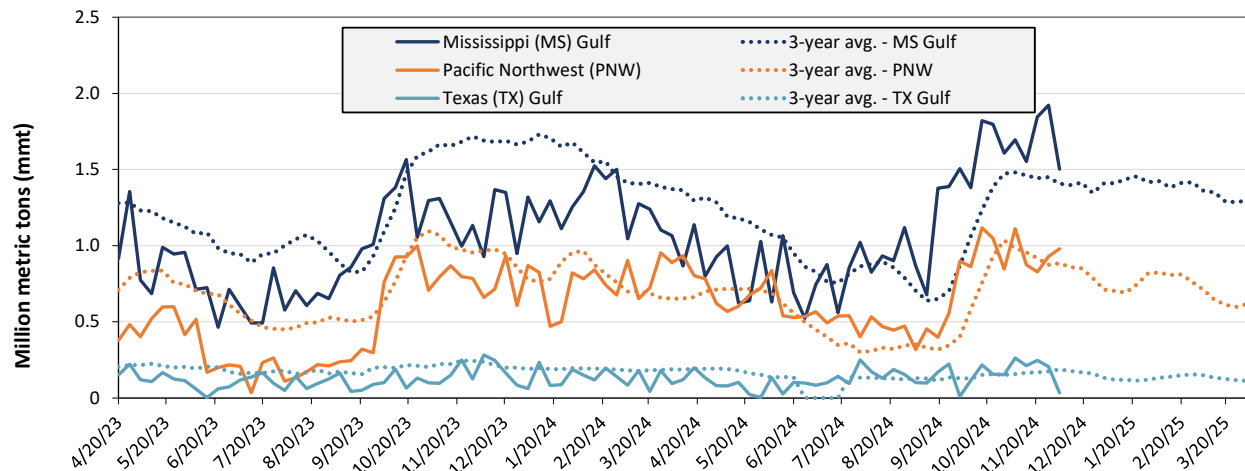
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Dec. 5: 3 mmt of grain inspected, down 16 percent from the previous week, up 42 percent from the same week last year, and down 4 percent from the 3-year average.

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

Figure 18. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 12/05/24 inspections (mmt):

MS Gulf: 1.5

PNW: 0.98

TX Gulf: 0.03

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 22	down 83	down 28	up 5
Last year (same 7 days)	up 111	down 85	up 63	up 65
3-year average (4-week moving average)	up 7	down 82	down 4	up 11

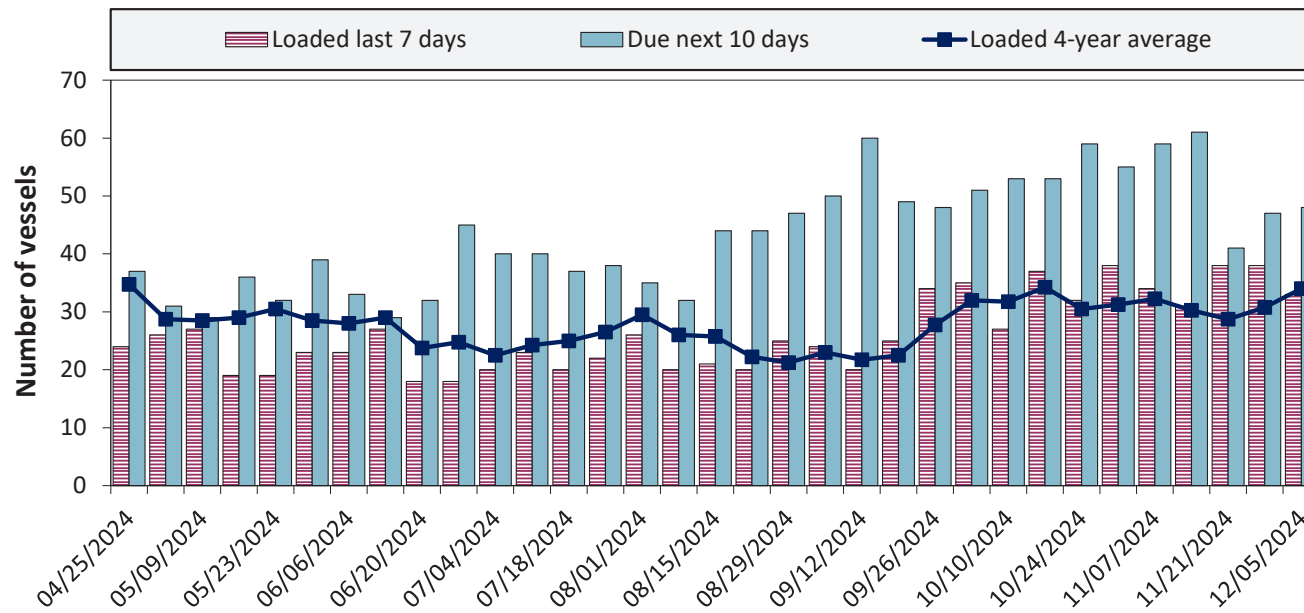
Source: USDA, Federal Grain Inspection Service.

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
12/5/2024	30	33	48	10
11/28/2024	42	38	47	10
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.

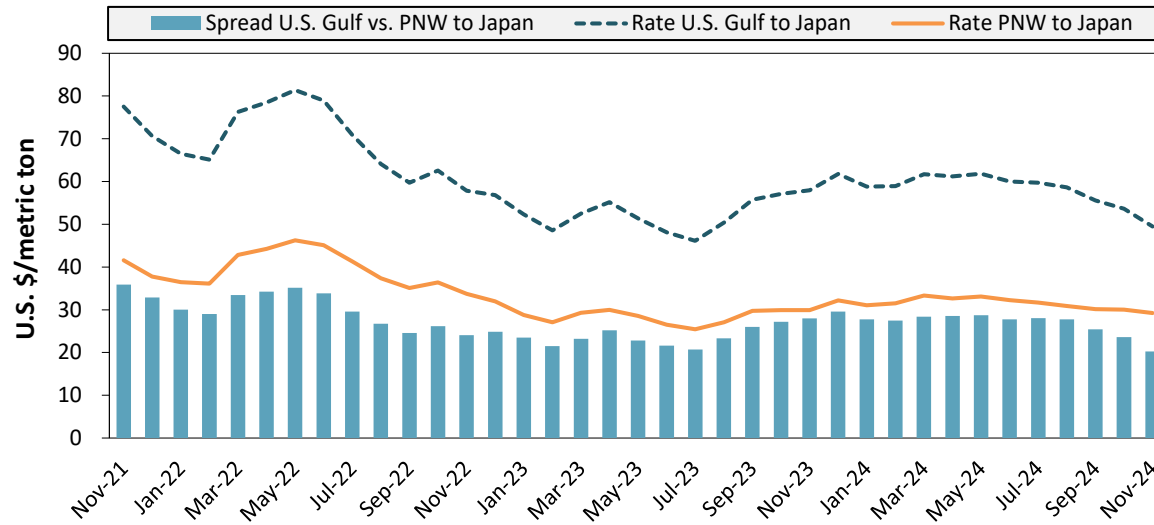
Figure 19. U.S. Gulf vessel loading activity



Week ending 12/5/24, number of vessels	Loaded	Due
Change from last year	0%	-8%
Change from 4-year average	-3%	-18%

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

Figure 20. U.S. Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
November 2024	\$50	\$29	\$20
Change from November 2023	-15%	-2%	-28%
Change from 4-year average	-16%	-9%	-24%

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

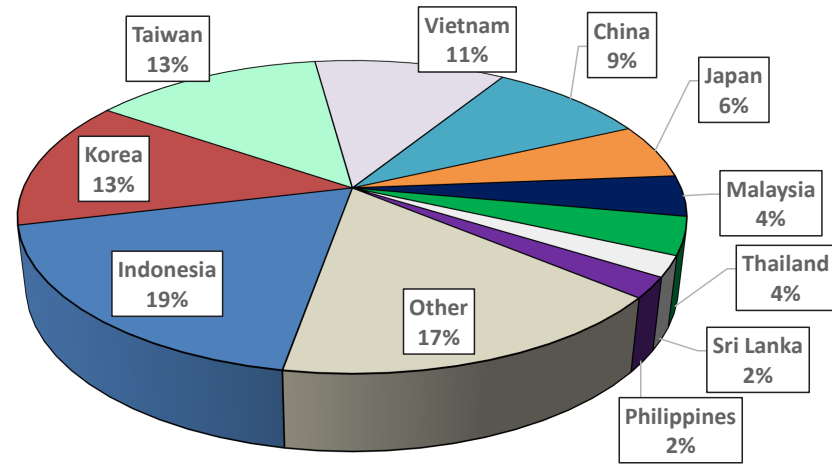
Table 20. Ocean freight rates for selected shipments, week ending 12/07/2024

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
PNW	S. Korea	Heavy grain	Nov 23, 2024	Jan 1/31, 2024	65,000	26.00
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
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.

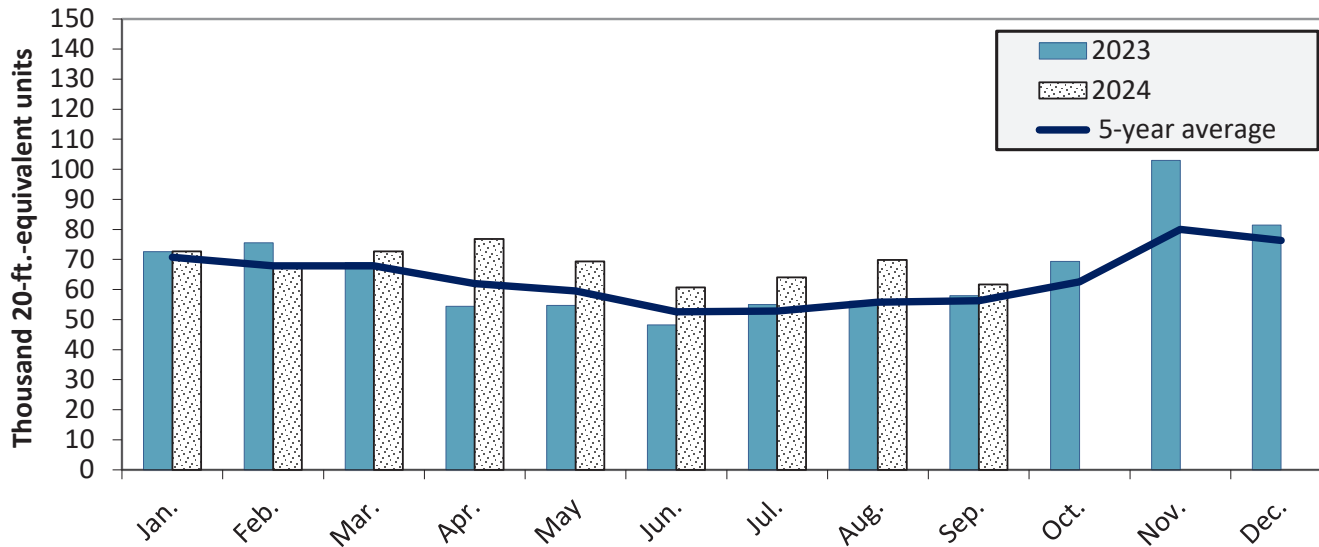
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2024



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 22. Monthly shipments of U.S. containerized grain exports



Containerized grain shipments in Sep. 2024 were up 6.4 percent from last year and up 9.6 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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