



Grain Transportation Report

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WEEKLY HIGHLIGHTS

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STB Responds To Midwest Lawmakers' Complaints About UP Embargo

From December 29 to January 25, in response to "severe weather," Union Pacific (UP) [placed a temporary embargo](#) on its service to Iowa, Minnesota, and Wisconsin. However, in a January 13 letter to the Surface Transportation Board (STB), [eight Midwest lawmakers](#) questioned UP's justification for the embargo and called for its immediate end. They noted UP had managed to provide service in previous winters with similar conditions. The lawmakers' letter marks the most recent in a string of complaints alleging that UP has made excessive, unjustified use of embargoes to mitigate congestion on its network. (STB held a hearing on the issue in December, responding to previous complaints.) On January 18, the STB Chair [responded to the lawmakers' letter](#), stating "the Board is deeply aware of UP's service shortfalls and ... will continue to hold UP accountable with respect to its plans to lift not only the current embargo, but to address its general use of embargoes to manage its operations." On January 20, [STB denied](#) UP's request to withhold from the public any documents submitted in response to the December embargo hearing. Instead, citing a need for transparency, STB required UP to submit public versions of the documents with any confidential commercial information redacted.

STB Rejects Railroads Petition for Delay in Small Rate Arbitration

On December 19, the Surface Transportation Board (STB) finalized two small-rate-case dispute procedures: voluntary arbitration and Final Offer Rate Review (FORR). All seven Class I railroads must agree to participate in the voluntary arbitration program for it to go into effect. The railroads have until February 23 to decide whether to participate. On December 29, multiple Class I railroads petitioned STB for a "stay" in the proceeding, which is a legal request that would delay the participation deadline. On January 24, [STB rejected](#) the railroads' petition for the delay on the grounds that the railroads did not provide adequate justification for it. However, the decision was made "without prejudice," meaning the railroads can file a new petition with STB. Additionally, railroads challenged both the voluntary arbitration and FORR decisions in circuit court and could petition the court for a stay instead.

BNSF Announces Plan for 2023 Capital Investments

On January 19, [BNSF announced](#) its 2023 capital investment plan of \$3.96 billion, intended to help the railroad operate a safe and reliable network while supporting the needs of its customers. BNSF will spend \$2.85 billion to maintain its 14,000 miles of track surfacing and related assets, \$402 million to acquire equipment, and \$700 million to expand and streamline its operations. Specific investment projects include continued work on intermodal facility expansion in Stockton, CA, and Chicago, IL; the addition of several segments of new track in Eastern Kansas and Southern California; and the construction of a second bridge over the Missouri River in Sibley, MO. The Sibley second-bridge project will allow double-tracking of one of the last segments of single track along BNSF's Southern Transcon route. Running between the West Coast and the Midwest, the Southern Transcon route is a key route for moving grain from the Midwest to livestock producers in the Southwest.

Snapshots by Sector

Export Sales

For the week ending January 12, [unshipped balances](#) of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 30.06 million metric tons (mmt), down 25 percent from the same time last year and down 2 percent from last week. Net [corn export sales](#) for MY 2022/23 were 1.132 mmt, up significantly from last week. Net [soybean export sales](#) were 0.986 mmt, up 37 percent from last week. Net weekly [wheat export sales](#) were 0.473 mmt, up significantly from last week.

Rail

U.S. Class I railroads originated 28,008 [grain carloads](#) during the week ending January 14. This was a 27-percent increase from the previous week, 14 percent more than last year, and 19 percent more than the 3-year average.

Average February shuttle [secondary railcar bids/offers](#) (per car) were \$248 above tariff for the week ending January 19. This was \$52 less than last week and \$1,010 lower than this week last year.

Barge

For the week ending January 21, [barged grain movements](#) totaled 668,635 tons. This was 22 percent higher than the previous week and 14 percent lower than the same period last year.

For the week ending January 21, 419 grain barges [moved down river](#)—31 more than last week. There were 674 grain barges [unloaded](#) in the New Orleans region, 23 percent fewer than last week.

Ocean

For the week ending January 19, 27 [oceangoing grain vessels](#) were loaded in the Gulf—29 percent fewer than the same period last year. Within the next 10 days (starting January 20), 38 vessels were expected to be loaded—32 percent fewer than the same period last year.

As of January 19, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$51.50, 1 percent less than the previous week. The rate from the Pacific Northwest to Japan was \$28.25 per mt, unchanged from the previous week.

Fuel

For the week ending January 23, the U.S. average [diesel fuel price](#) increased 8.0 cents from the previous week to \$4.604 per gallon, 82.4 cents above the same week last year.

Feature Article/Calendar

Grain Transportation Update: Conditions Have Improved, But Challenges Persist

Although some modes of grain transportation have shown remarkable improvements, challenges persist, and weak demand for transportation looms in the forecast. After poor performance in 2022, some rail-service metrics are looking up lately with increased grain carloads and train speeds. However, the number of unfilled orders of empty grain cars is at a record high, and grain train origin dwell times still hover above the 4-year average. Barge rates, ocean freight rates, and diesel fuel prices have all fallen in recent weeks. While both barge and ocean freight rates are currently below the same period last year, diesel fuel prices are above the same period a year ago.

According to USDA's January [World Agricultural Supply and Demand Estimates \(WASDE\)](#), total U.S. exports and domestic use of the three major grains (corn, soybeans, and wheat) are expected to fall from marketing year (MY) 2021/22 to MY 2022/23—suggesting a decrease in future grain transportation demand.

Carloads Reach New Weekly High in 2023; Rail Performance Metrics Vary

As detailed in [last week's feature](#), rail service problems persisted throughout 2022 and, so far, extended into 2023—despite some signs of improvement. On the one hand, grain carloads were strong in the latest week of data. According to the Association of American Railroads, U.S. Class I railroad grain carloads were 28,008 for the week ending January 14, which was up 52 percent from 2 weeks prior and was the highest weekly level seen since December 2021. Additionally, the Surface Transportation Board's (STB) rail service metrics ([available on AgTransport](#)) show that grain train speeds have been trending upward since summer. For the week ending January 18, average grain train speeds were the highest they had been since January 2021.

On the other hand, a number of STB metrics suggest problems still beset grain rail service. Notably, in the latest week of data, the number of unfilled orders for empty grain cars hit a new, all-time high of 18,737 cars. Although, in the latest data, grain train origin dwell times fell significantly from their peak over the holidays, they were still 25 percent above the 2019-22 average for the same week of the year.

Bids for February car service in the secondary auction markets averaged \$248 for the week ending January 19. The positive value likely reflects some service issues and shippers' willingness to pay a premium to help secure car service. However, on average, bids have declined in recent weeks, possibly suggesting some improvements to service.

Fourth-Quarter 2022 Spot Rates Hit All-Time Highs, As Barged Grain Movements Trail Historical Trends

In the Mississippi River System (MRS), low water levels that began in third quarter 2022 worsened in the fourth quarter, reaching lows not seen since 1988. On October 18, the Mississippi River water gauge at Memphis, TN, reached an all-time low of -10.81 feet. The low water levels led to reductions in flow, tow size, and draft size. In response to these conditions, October 2022 barge rates reached an all-time high of \$99.33 per ton at Cairo-Memphis that was well above the October 2021 rate and the prior-3-year average. Although barge rates followed their typical pattern of falling from the third to fourth quarter, they were still well above 2021's rates.

At the beginning of the fourth quarter, record spot rates could be seen all along the Mississippi River. Likewise, by the end of the quarter, rates all along the river had fallen, but still remained above the same 2021 period and the 3-year average. During the week of October 11, the St. Louis spot rate (the cost to request nearby services) reached an all-time high of 2,653 percent above the benchmark tariff (\$105.85 per ton)—383 percent higher than the same week in 2021 and 445 percent higher than the 3-year average. By the week of December 27, the St. Louis spot rate had fallen to 825 percent above the benchmark tariff (\$32.92)—69 percent lower than its peak, but 26 percent higher than the same week in 2021 and 113 percent higher than the 3-year average.

As the harvest drew to a close, fourth-quarter weekly grain movements exceeded the previous quarter. For the week ending December 31, the year-to-date (YTD) 2022 total downbound grain values were 32.7 million tons—down 11 percent from last year and down 7 percent from the 3-year average. Fourth-quarter weekly grain movements peaked at 808,000 tons in the week of November 19—down from the fourth-quarter 2021 peak of 889,000 tons in the week of November 13.

Dry-Bulk Ocean Freight Rates Continue To Fall

Ocean freight rates for shipping bulk commodities, including grain, fell for 4 consecutive weeks. As of January 19, 2023, the ocean freight rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$51.75—5 percent less than this year's first available rate (January 5), 20 percent less than the same period a year ago, and 3 percent more than the 4-year average. The rate from the Pacific Northwest to Japan was \$28.25 per mt—7 percent less than the start of the year, 19 percent less than the same period in 2022, and 3 percent more than the 4-year average. Also, as of January 19, the rate from the U.S. Gulf to Europe was \$26.50 per mt—7 percent less than the beginning of the year, but 10 percent more than the same 2022 period, and 37 percent more than the 4-year average. The rise in the U.S. Gulf-to-Europe rate since last year reflects increasing trade between United States and Europe. In general, the relatively low ocean freight rates reflect slowed market activity because of seasonal holidays such as New Year holidays around the world and Chinese Lunar Year. YTD, as of January 19, an average of 26 oceangoing grain vessels per week were loaded in the U.S. Gulf, compared to an average 34 vessels per week for the same period last year.

Diesel Prices Projected To Decline in 2023 and 2024

After several record-breaking increases in diesel prices in 2022, diesel prices started to drop in mid fourth quarter: beginning with the week ending November 14, diesel prices dropped for 7 consecutive weeks, including double-digit drops for 3 of those weeks. After rising 4.6 cents per gallon for the week ending January 2, the U.S. average diesel fuel price dropped again for the next 2 weeks. For the week ending January 23, the U.S. average diesel fuel price increased to \$4.604 per gallon, up 8.0 cents from the previous week, and up 82.4 cents from the same week last year. According to the recent [Energy Information Administration \(EIA\) forecast](#), U.S. refining margins for diesel will fall 20 percent in 2023 and fall 38 percent in 2024. EIA also forecasts retail diesel prices to average \$4.20 per gallon in 2023, down 16 percent from 2022. In 2024, EIA forecasts diesel prices will continue to fall and will average \$3.70 per gallon. The EIA forecast is based on expectations of continued high production and slower growth of demand for diesel.

Grain Exports Projected To Decline in MY 2022/23

According to USDA’s January *WASDE*, total U.S. exports of the three major grains are expected to total 4.7 billion bushels in MY 2022/23, down 14 percent from MY 2021/22 (table 1). The lower exports are due to lower exportable supplies, high transportation costs, and uncompetitive prices. The lower exports also reduce the demand for grain transportation.

Domestic grain use is projected to fall 3 percent, mainly as a result of reduced domestic use (feed and industrial) of corn—further lowering the demand for grain transportation. From MY 2021/22 to MY 2022/23, total production of corn, soybeans, and wheat is projected to fall 7 percent (table 1). By commodity, the projected production volumes and changes from MY 2021/22 are as follows: corn, 13.7 billion bushels (down 9 percent); soybeans, 4.3 billion bushels (down 4 percent); and wheat, 1.7 billion bushels (unchanged).

From MY 2021/22 to MY 2022/23, U.S. corn exports are projected to drop 22 percent (*GTR table 12*). This decrease is the [result of](#) reduced production and a slower pace of corn shipments and commitments. Lower corn exports are also [due to](#) high export prices, which are partly driven by tight exportable supplies and high transportation costs. Representing future grain transportation demand, YTD outstanding (unshipped) corn exports are 53 percent below the same time last year and 45 percent below the 3-year average, while total commitments are 46 percent below last year and 37 percent below the 3-year average.

In MY 2022/23, total U.S. soybean exports are projected to be down 8 percent from MY 2021/22, to 54.2 million metric tons (*GTR table 13*). The decline is expected to result from lower production and increased competition from Brazil. Despite the projected decline, compared to the same time last year, YTD outstanding soybean exports are up 41 percent, and total soybean exports are up 5 percent. However, [record soybean production in Brazil](#) is expected to put downward pressure on U.S. exports as buyers are more likely to source soybeans from abundant Brazilian new-crop supplies.

Total U.S. wheat exports are projected to decline 3 percent from MY 2021/22 (*GTR table 14*) to their lowest level in 51 years [because of](#) the slow pace of export sales and uncompetitive price of U.S. wheat. U.S. exports face [increased competition](#) from the European Union (EU) because of the EU’s large estimated wheat crop. Also, the pace of shipments has increased both from the EU and from Ukraine under the Black Sea Grain Initiative. YTD, unshipped exports are 10 percent below the same time in MY 2021/22 and 18 percent below the 3-year average. YTD total commitments are 6 percent below the same time last year and 20 percent below the 3-year average.

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Table 1. Major grains: production and use, January 2023					
million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2022/23 (Projected)					
Production	13,730	4,276	1,650	19,656	-7.2%
Exports	1,925	1,990	775	4,690	-13.6%
Domestic use	11,990	2,365	1,126	15,481	-2.5%
Ending stocks	1,242	210	567		
Total use	13,915	4,355	1,901		
Stocks/use	8.9%	4.8%	29.8%		
United States 2021/22 (Estimated)					
Production	15,074	4,465	1,646	21,185	5.1%
Exports	2,471	2,158	800	5,429	-9.6%
Domestic use	12,484	2,308	1,088	15,880	2.9%
Ending stocks	1,377	274	698		
Total use	14,956	4,465	1,888		
Stocks/use	9.2%	6.1%	37.0%		
United States 2020/21					
Production	14,111	4,216	1,828	20,155	
Exports	2,747	2,266	994	6,007	
Domestic use	12,074	2,238	1,117	15,429	
Ending stocks	1,235	257	845		
Total use	14,821	4,504	2,111		
Stocks/use	8.3%	5.7%	40.0%		

Source: USDA, World Agricultural Supply and Demand Estimates, January 2023.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck		Rail		Barge	Ocean	
		Non-Shuttle	Shuttle			Gulf	Pacific
01/25/23	309	333	277		364	230	200
01/18/23	304	333	289		350	234	200

¹Indicator: 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.

Table 2

Market Update: U.S. origins to export position price spreads (\$/bushel)

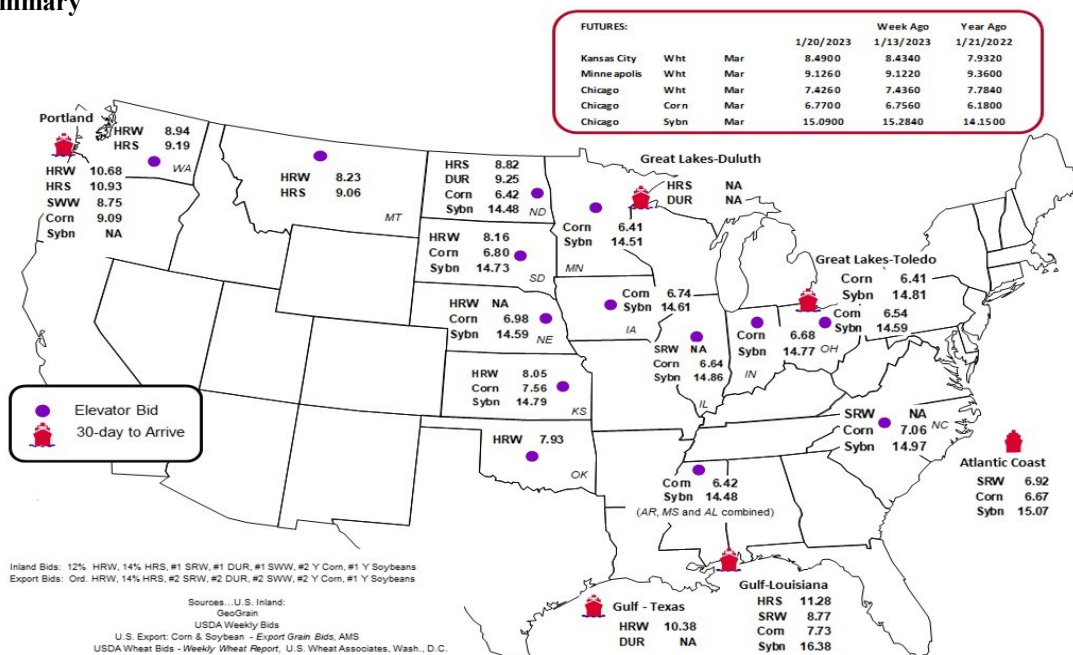
Commodity	Origin-destination	1/20/2023	1/13/2023
Corn	IL-Gulf	-1.09	-1.09
Corn	NE-Gulf	-0.75	-0.78
Soybean	IA-Gulf	-1.77	-1.81
HRW	KS-Gulf	-2.33	-2.38
HRS	ND-Portland	-2.11	-2.24

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

Source: USDA, Agricultural Marketing Service.

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.

Figure 1
Grain bid summary



Rail Transportation

Table 3

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 1/14/2023	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,306	3,100	14,471	1,334	6,797	28,008	5,865	6,121
This week last year	2,257	2,464	11,756	1,571	6,477	24,525	2,231	2,893
2023 YTD	4,631	5,789	25,173	2,794	11,710	50,097	10,833	10,039
2022 YTD	3,530	5,113	22,755	2,660	12,308	46,366	5,344	6,036
2023 YTD as % of 2022 YTD	131	113	111	105	95	108	203	166
Last 4 weeks as % of 2022*	114	122	99	106	94	102	174	138
Last 4 weeks as % of 3-yr. avg.**	115	111	95	121	94	99	132	114
Total 2022	93,313	130,299	570,232	66,338	296,945	1,157,127	214,604	214,010

*The past 4 weeks of this year as a percent of the same 4 weeks last year.

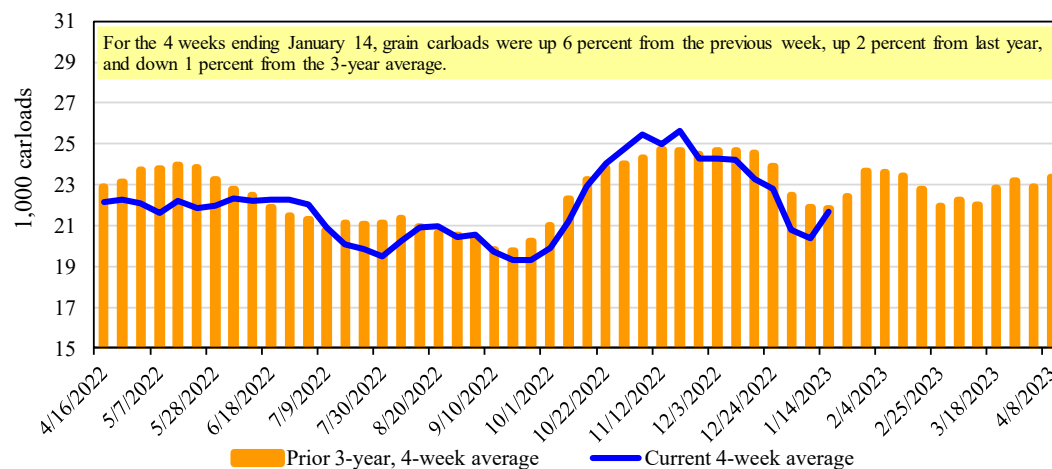
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 2

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 4

Railcar auction offerings¹ (\$/car)²

For the week ending: 1/19/2023		Delivery period							
		Feb-23	Feb-22	Mar-23	Mar-22	Apr-23	Apr-22	May-23	May-22
BNSF ³	COT grain units	no offer	0	no offer	0	0	0	0	no bids
	COT grain single-car	no offer	3	no offer	0	28	0	28	0
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a

¹ Auction offerings are for single-car and unit train shipments only.

² Average premium/discount to tariff, last auction. n/a = not available.

³ BNSF - COT = BNSF Railway Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

⁴ UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

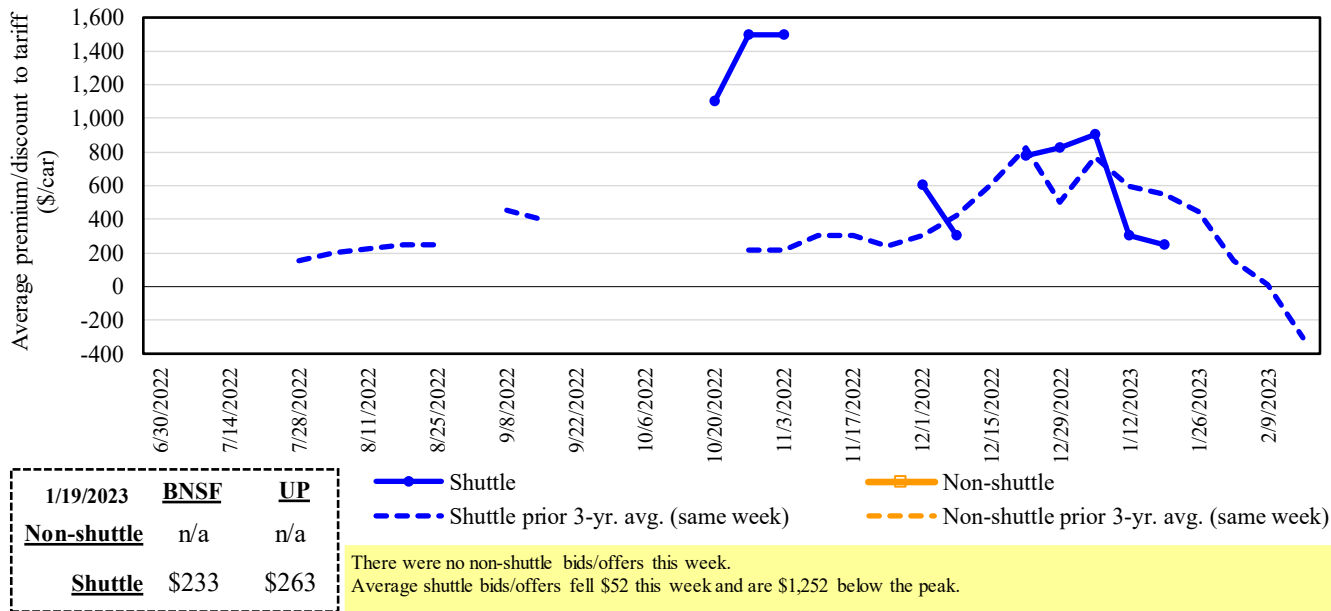
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

Source: USDA, Agricultural Marketing Service.

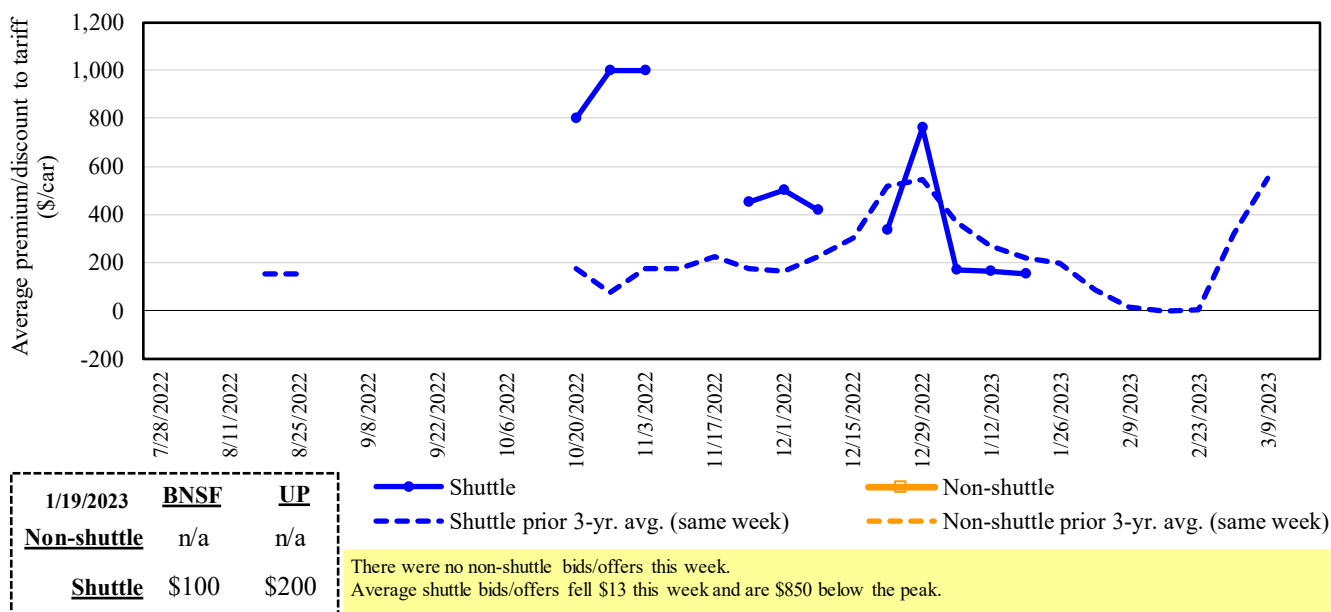
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 3
Secondary market bids/offers for railcars to be delivered in February 2023



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.

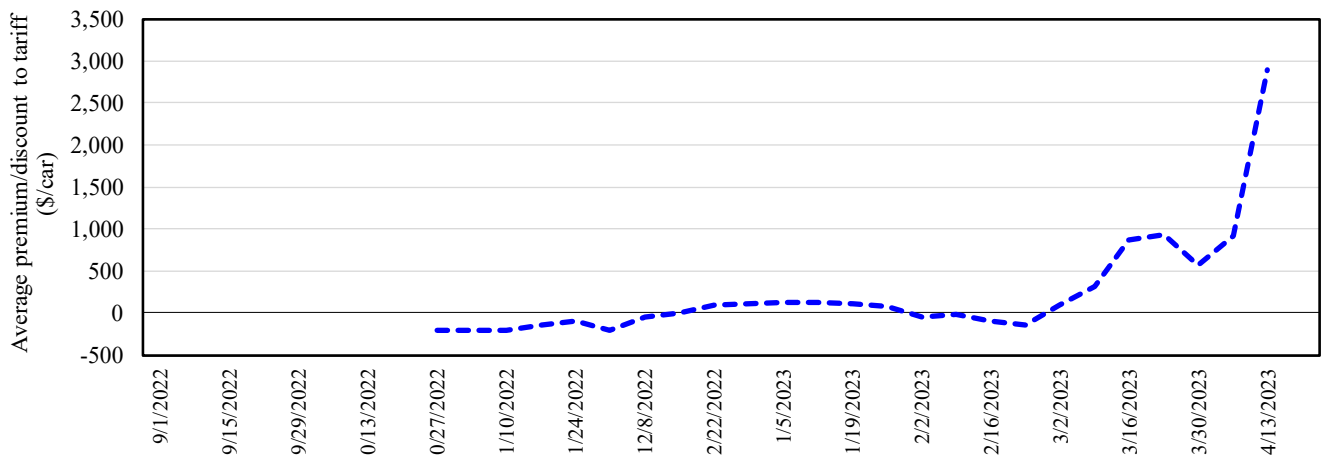
Figure 4
Secondary market bids/offers for railcars to be delivered in March 2023



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.

Figure 5

Secondary market bids/offers for railcars to be delivered in April 2023



1/19/2023	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	n/a

—●— Shuttle
—□— Non-shuttle
- - -●- - - Shuttle prior 3-yr. avg. (same week)
- - -□- - - Non-shuttle prior 3-yr. avg. (same week)

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

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.

Table 5

Weekly secondary railcar market (\$/car)¹

For the week ending:		Delivery period					
		Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23
Non-shuttle	BNSF-GF	n/a	n/a	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	n/a	n/a	n/a	n/a	n/a
	UP-Pool	n/a	n/a	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	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	233	100	n/a	n/a	n/a	n/a
	Change from last week	(242)	(63)	n/a	n/a	n/a	n/a
	Change from same week 2022	(1,092)	(463)	n/a	n/a	n/a	n/a
	UP-Pool	263	200	n/a	n/a	n/a	n/a
	Change from last week	138	n/a	n/a	n/a	n/a	n/a
	Change from same week 2022	(929)	(350)	n/a	n/a	n/a	n/a

¹ Average premium/discount to tariff, \$/car-last week.

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool;

BNSF = BNSF Railway; UP = Union Pacific Railroad.

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: USDA, Agricultural Marketing Service.

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 and shuttle train shipments¹

January 2023	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,695	\$324	\$39.91	\$1.09	4
	Grand Forks, ND	Duluth-Superior, MN	\$3,858	\$152	\$39.82	\$1.08	9
	Wichita, KS	Los Angeles, CA	\$7,490	\$780	\$82.13	\$2.24	11
	Wichita, KS	New Orleans, LA	\$4,600	\$570	\$51.34	\$1.40	7
	Sioux Falls, SD	Galveston-Houston, TX	\$7,226	\$641	\$78.12	\$2.13	10
	Colby, KS	Galveston-Houston, TX	\$4,850	\$624	\$54.36	\$1.48	7
	Amarillo, TX	Los Angeles, CA	\$5,121	\$868	\$59.48	\$1.62	8
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$644	\$46.12	\$1.17	7
	Toledo, OH	Raleigh, NC	\$8,551	\$705	\$91.92	\$2.33	9
	Des Moines, IA	Davenport, IA	\$2,655	\$136	\$27.72	\$0.70	8
	Indianapolis, IN	Atlanta, GA	\$6,593	\$530	\$70.73	\$1.80	9
	Indianapolis, IN	Knoxville, TN	\$5,564	\$343	\$58.66	\$1.49	9
	Des Moines, IA	Little Rock, AR	\$4,250	\$401	\$46.18	\$1.17	11
	Des Moines, IA	Los Angeles, CA	\$6,130	\$1,167	\$72.46	\$1.84	13
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,856	\$1,001	\$48.23	\$1.31	19
	Toledo, OH	Huntsville, AL	\$7,037	\$503	\$74.87	\$2.04	8
	Indianapolis, IN	Raleigh, NC	\$7,843	\$715	\$84.99	\$2.31	10
	Indianapolis, IN	Huntsville, AL	\$5,689	\$339	\$59.87	\$1.63	9
	Champaign-Urbana, IL	New Orleans, LA	\$4,865	\$644	\$54.71	\$1.49	9
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,393	\$449	\$48.08	\$1.31	13
	Wichita, KS	Galveston-Houston, TX	\$4,311	\$349	\$46.28	\$1.26	4
	Chicago, IL	Albany, NY	\$7,090	\$666	\$77.02	\$2.10	10
	Grand Forks, ND	Portland, OR	\$6,051	\$775	\$67.79	\$1.84	13
	Grand Forks, ND	Galveston-Houston, TX	\$5,399	\$807	\$61.63	\$1.68	15
	Colby, KS	Portland, OR	\$5,923	\$1,023	\$68.98	\$1.88	6
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$944	\$65.58	\$1.67	18
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$864	\$64.39	\$1.64	17
	Champaign-Urbana, IL	New Orleans, LA	\$4,170	\$644	\$47.80	\$1.21	13
	Lincoln, NE	Galveston-Houston, TX	\$4,360	\$504	\$48.30	\$1.23	16
	Des Moines, IA	Amarillo, TX	\$4,670	\$504	\$51.38	\$1.31	11
	Minneapolis, MN	Tacoma, WA	\$5,660	\$936	\$65.51	\$1.66	18
	Council Bluffs, IA	Stockton, CA	\$5,580	\$968	\$65.03	\$1.65	18
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,350	\$864	\$71.64	\$1.95	15
	Minneapolis, MN	Portland, OR	\$6,400	\$944	\$72.93	\$1.98	16
	Fargo, ND	Tacoma, WA	\$6,250	\$769	\$69.70	\$1.90	14
	Council Bluffs, IA	New Orleans, LA	\$5,095	\$742	\$57.97	\$1.58	9
	Toledo, OH	Huntsville, AL	\$5,277	\$503	\$57.39	\$1.56	11
	Grand Island, NE	Portland, OR	\$5,730	\$1,048	\$67.31	\$1.83	15

¹A 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.

²Approximate load per car = 111 short tons (100.7 metric tons): corn 56 pounds per bushel (lbs/bu), wheat and soybeans 60 lbs/bu.

³Regional economic areas are defined by the Bureau of Economic Analysis (BEA).

⁴Percentage change year over year (Y/Y) calculated using tariff rate plus fuel surcharge.

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

Table 7

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

Date: December 2021					Tariff rate plus		Percent change ⁴
Commodity	Origin state	Destination region	Tariff rate per car ¹	Fuel surcharge per car ²	fuel surcharge per:		
					metric ton ³	bushel ³	
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

¹Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009.

³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

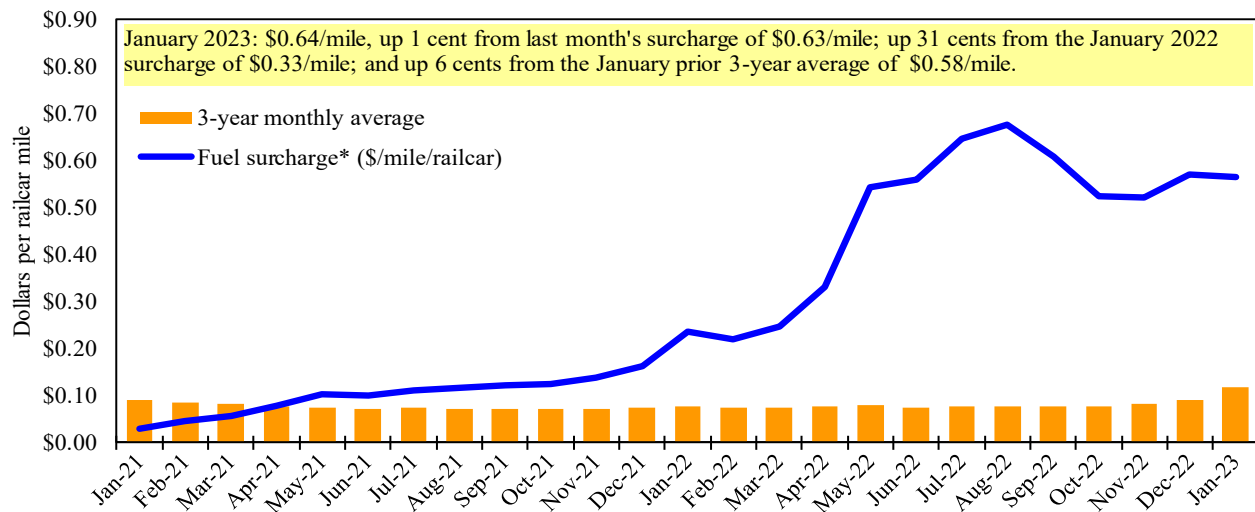
⁴Percentage change calculated using tariff rate plus fuel surcharge; Y/Y = year over year.

⁵As of January 1, 2022, 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.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

Figure 6

Railroad fuel surcharges, North American weighted average¹

¹Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

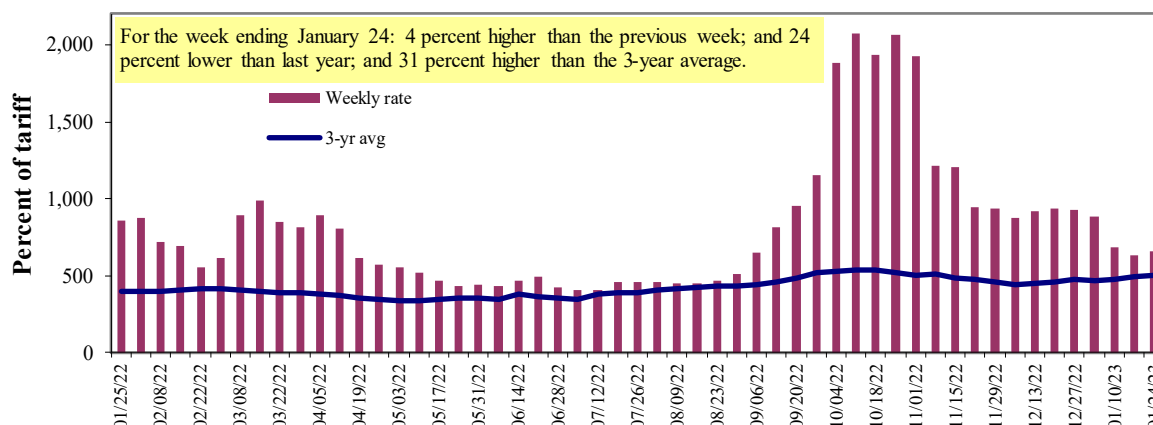
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 7

Illinois River barge freight rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

*Source: USDA, Agricultural Marketing Service.

Table 8

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	1/24/2023	-	-	656	447	529	529	360
	1/17/2023	-	-	630	483	527	527	372
\$/ton	1/24/2023	-	-	30.44	17.84	24.81	21.37	11.30
	1/17/2023	-	-	29.23	19.27	24.72	21.29	11.68
Current week % change from the same week:								
	Last year	-	-	-24	-42	-31	-31	-42
	3-year avg. ²	-	-	31	12	23	23	7
Rate ¹	February	-	-	611	425	489	489	352
	April	561	518	501	386	442	442	341

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" data not available.

Source: USDA, Agricultural Marketing Service.

Figure 8

Benchmark tariff rates

Calculating barge rate per ton:

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

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

Map Credit: USDA, Agricultural Marketing Service

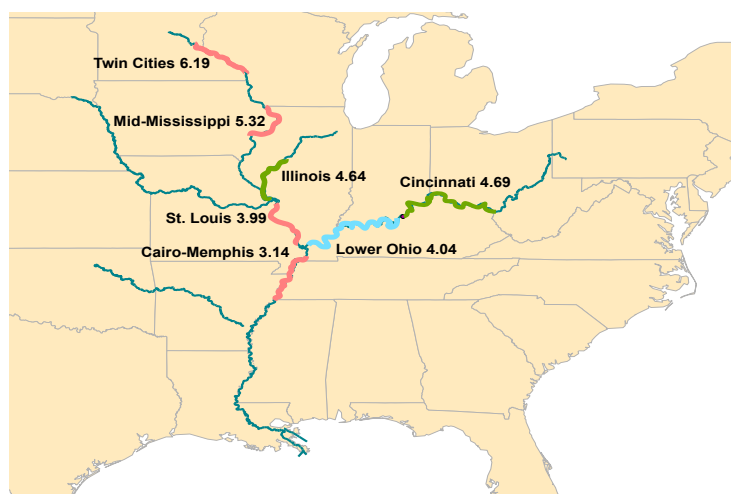
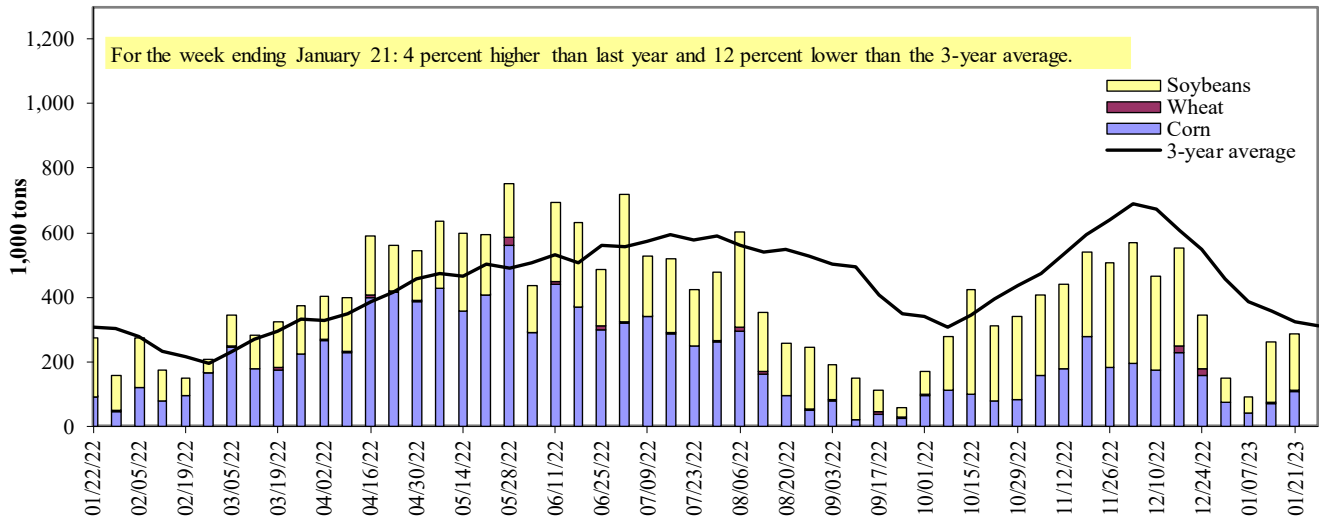


Figure 9

Barge movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



¹ The 3-year average is a 4-week moving 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.

Table 9

Barge grain movements (1,000 tons)

For the week ending 01/21/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	57	2	206	6	271
Granite City, IL (L27)	110	2	175	21	307
Illinois River (La Grange)	46	3	179	0	228
Ohio River (Olmsted)	151	3	184	5	344
Arkansas River (L1)	0	8	10	0	18
Weekly total - 2023	261	13	368	26	669
Weekly total - 2022	314	24	437	0	775
2023 YTD ¹	525	29	971	45	1,570
2022 YTD ¹	819	80	901	12	1,812
2023 as % of 2022 YTD	64	36	108	385	87
Last 4 weeks as % of 2022 ²	64	43	95	241	81
Total 2022	16,437	1,594	14,464	232	32,727

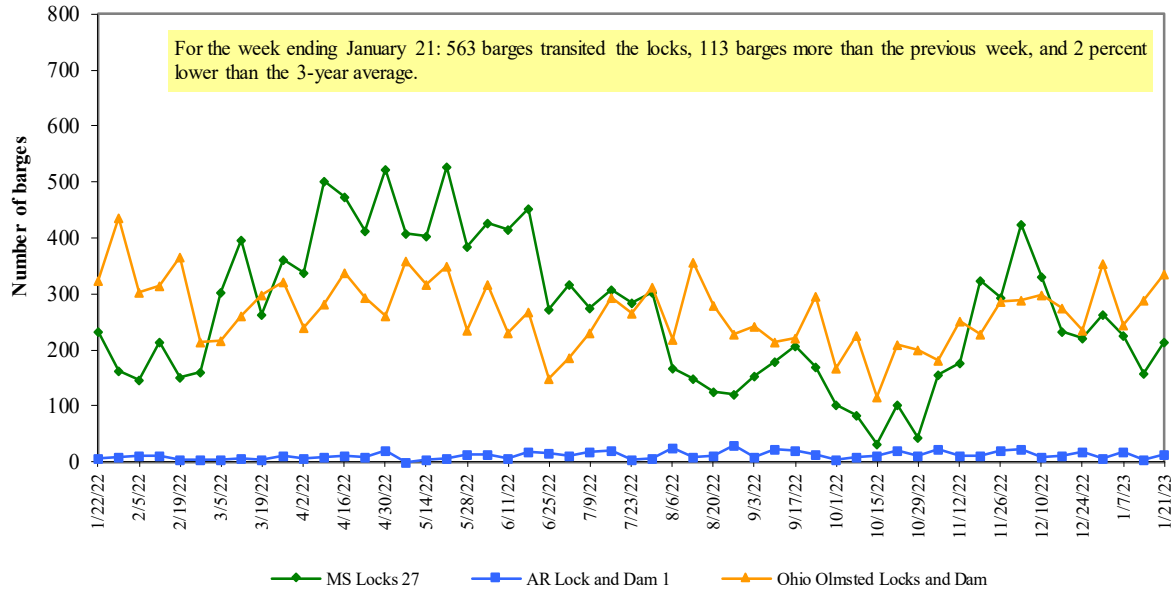
¹ Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

² As a percent of same period in 2022.

Note: L (as in "L15") refers to a lock, locks, or locks 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.

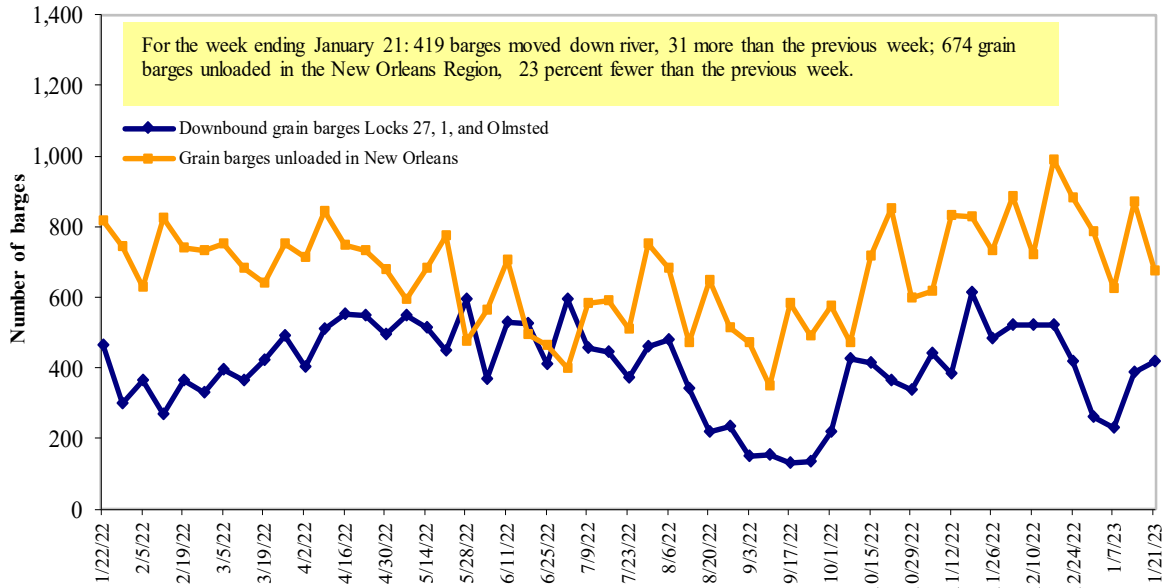
Source: U.S. Army Corps of Engineers.

Figure 10
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11
Grain barges for export in New Orleans region



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.

Truck Transportation

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 10

Retail on-highway diesel prices, week ending 1/23/2023 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.810	0.058	1.029
	New England	5.104	0.023	1.327
	Central Atlantic	5.069	0.030	1.135
	Lower Atlantic	4.686	0.072	1.000
II	Midwest	4.473	0.099	0.817
III	Gulf Coast	4.320	0.096	0.789
IV	Rocky Mountain	4.736	0.007	1.038
V	West Coast	5.095	0.061	0.605
	West Coast less California	4.757	0.069	0.647
	California	5.484	0.054	0.660
Total	United States	4.604	0.080	0.824

¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

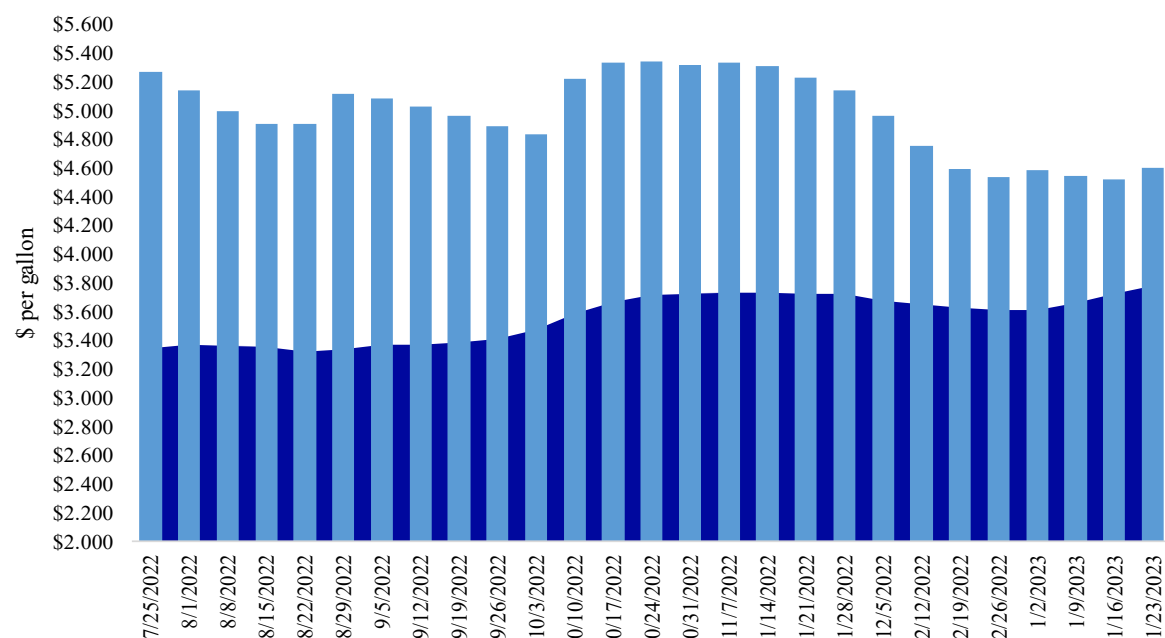
Source: U.S. Department of Energy, Energy Information Administration.

Figure 12

Weekly diesel fuel prices, U.S. average

For the week ending January 23, the U.S. average diesel fuel price increased 8.0 cents from the previous week to \$4.604 per gallon, 82.4 cents above the same week last year.

■ Last year \$3.780 ■ Current year \$4.604



Note: On June 13, 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, Retail On-Highway Diesel Prices.

Grain Exports

Table 11

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

For the week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export balances¹									
1/12/2023	985	644	1,390	1,232	120	4,369	12,029	13,661	30,059
This week year ago	2,017	702	1,273	783	55	4,830	25,584	9,670	40,084
Cumulative exports-marketing year²									
2022/23 YTD	3,270	1,781	3,314	2,631	168	11,165	11,100	31,728	53,993
2021/22 YTD	4,484	1,787	3,155	2,161	113	11,698	16,962	33,438	62,099
YTD 2022/23 as % of 2021/22	73	100	105	122	149	95	65	95	87
Last 4 wks. as % of same period 2021/22	48	91	106	157	217	89	46	156	78
Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622
Total 2020/21	8,422	1,790	7,500	6,438	656	24,807	66,958	60,571	152,335

¹ Current unshipped (outstanding) export sales to date.

² Shipped export sales to date.

Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW = soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 12

Top 5 importers¹ of U.S. corn

For the week ending 1/12/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
	1,000 mt -			
Mexico	11,158	12,550	(11)	15,227
China	3,935	12,433	(68)	12,616
Japan	2,068	4,565	(55)	10,273
Columbia	461	2,526	(82)	4,398
Korea	158	78	102	2,563
Top 5 importers	17,779	32,152	(45)	45,077
Total U.S. corn export sales	23,128	42,546	(46)	56,665
% of projected exports	47%	68%		
Change from prior week ²	1,132	1,091		
Top 5 importers' share of U.S. corn export sales	77%	76%		80%
USDA forecast January 2023	48,982	62,875	(22)	
Corn use for ethanol USDA forecast, January 2023	133,985	135,281	(1)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), 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.

³FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers¹ of U.S. soybeans

For the week ending 1/12/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
China	37,109	43,108	(14)	27,283
Mexico	3,637	3,514	3	4,929
Egypt	782	2,052	(62)	3,553
Japan	1,541	1,351	14	2,266
Indonesia	695	808	(14)	2,116
Top 5 importers	43,765	50,833	(14)	40,147
Total U.S. soybean export sales	45,390	43,108	5	54,231
% of projected exports	84%	73%		
change from prior week ²	986	671		
Top 5 importers' share of U.S. soybean export sales	96%	118%		74%
USDA forecast, January 2023	54,223	58,801	(8)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.

³FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

Top 10 importers¹ of all U.S. wheat

For the week ending 1/12/2023	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
Mexico	2,645	2,894	(9)	3,566
Philippines	1,765	2,446	(28)	2,985
Japan	1,768	1,956	(10)	2,453
China	750	848	(12)	1,537
Nigeria	692	1,697	(59)	1,528
Korea	1,117	1,016	10	1,459
Taiwan	605	714	(15)	1,106
Indonesia	299	67	346	711
Thailand	610	510	20	703
Colombia	412	499	(17)	621
Top 10 importers	10,663	12,645	(16)	16,669
Total U.S. wheat export sales	15,534	16,528	(6)	22,763
% of projected exports	74%	76%		
change from prior week ²	473	381		
Top 10 importers' share of U.S. wheat export sales	69%	77%		73%
USDA forecast, January 2023	21,117	21,798	(3)	

¹ Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; Marketing year (MY) = Jun 1 - May 31.

² Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.

³ FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number.

Source: USDA, Foreign Agricultural Service.

Table 15

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

Port regions	For the week ending 01/19/23	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	209	231	91	544	471	116	106	63	9,836
Corn	70	201	35	337	601	56	54	65	9,615
Soybeans	719	356	202	1,286	1,203	107	91	107	14,178
Total	998	788	127	2,167	2,274	95	84	84	33,629
Mississippi Gulf									
Wheat	22	30	73	73	266	27	25	33	4,053
Corn	481	333	144	875	2,075	42	58	63	30,781
Soybeans	945	1,451	65	2,955	2,480	119	126	109	31,283
Total	1,448	1,814	80	3,902	4,821	81	94	90	66,116
Texas Gulf									
Wheat	31	36	85	67	187	36	43	32	3,421
Corn	27	0	n/a	27	33	83	83	85	648
Soybeans	0	52	0	52	0	n/a	n/a	60	685
Total	58	88	66	147	220	67	92	46	4,754
Interior									
Wheat	83	43	193	143	114	126	141	145	2,912
Corn	136	225	61	503	496	101	93	107	8,961
Soybeans	159	253	63	519	396	131	127	113	7,109
Total	378	520	73	1,165	1,006	116	111	114	18,982
Great Lakes									
Wheat	1	3	31	4	0	n/a	n/a	30	395
Corn	0	0	n/a	0	0	n/a	n/a	n/a	158
Soybeans	2	0	n/a	2	0	n/a	n/a	40	760
Total	3	3	97	6	0	n/a	n/a	34	1,312
Atlantic									
Wheat	6	0	n/a	6	4	129	129	387	169
Corn	0	7	0	12	17	67	67	202	309
Soybeans	76	139	54	290	172	168	191	196	2,867
Total	81	146	56	307	194	159	180	198	3,345
U.S. total from ports*									
Wheat	352	343	103	837	1,042	80	78	61	20,786
Corn	715	766	93	1,754	3,221	54	63	71	50,471
Soybeans	1,900	2,250	84	5,104	4,252	120	121	110	56,882
Total	2,967	3,359	88	7,695	8,515	90	95	91	128,139

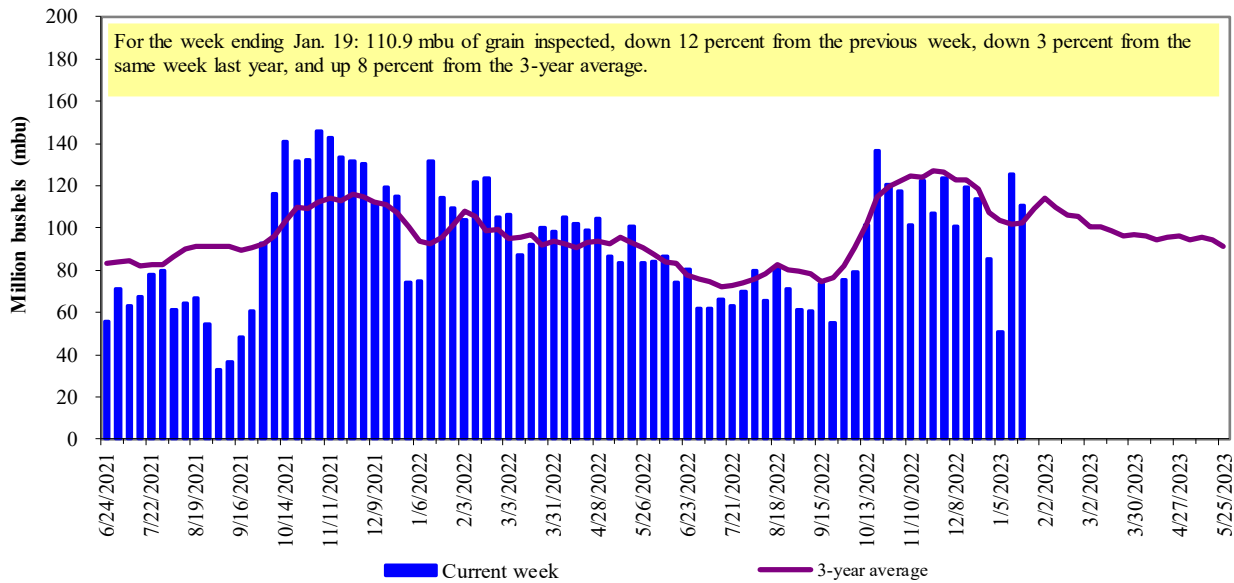
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

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 13

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

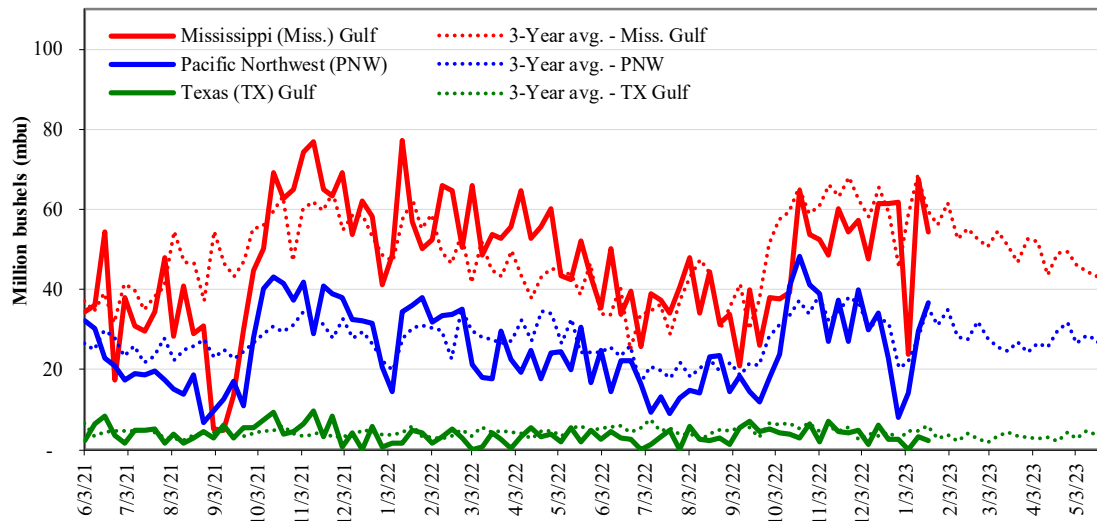


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

U.S. Grain inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



Week ending	01/19/23 inspections (mbu):	Percent change	MS Gulf	TX	U.S. Gulf	PNW
MS Gulf:	54.5	Last wk:	down 19	down 32	down 20	up 25
PNW:	36.9	Last Year (same wk):	down 5	down 54	down 8	up 2
TX Gulf:	2.2	3-yr avg. (4-wk. mov.)	down 6	down 50	down 9	up 40

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

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

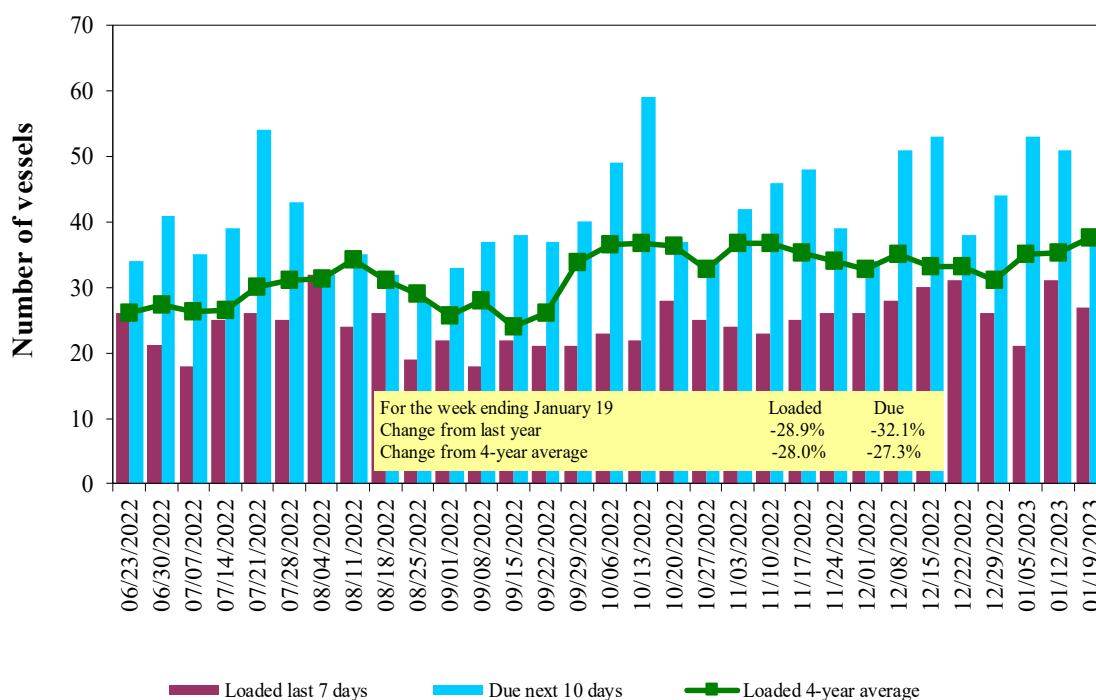
Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/19/2023	31	27	38	24
1/12/2023	29	31	51	18
2022 range	(14...61)	(18...39)	(28...62)	(5...23)
2022 average	30	28	44	13

Note: The data is voluntarily collected and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 15

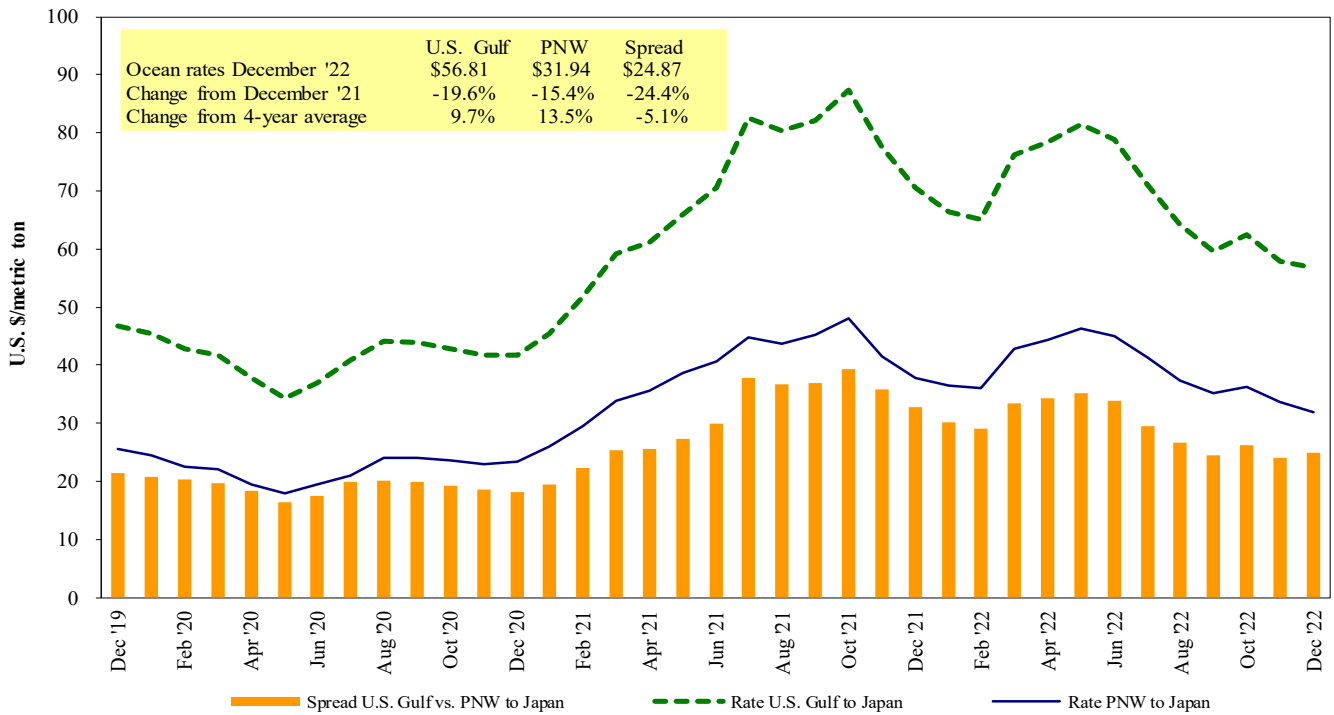
U.S. Gulf¹ vessel loading activity



¹U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source: USDA, Agricultural Marketing Service.

Figure 16

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 17

Ocean freight rates for selected shipments, week ending 01/21/2023

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
U.S. Gulf	Japan	Heavy grain	Jul 20/30, 2022	50,000	81.50
U.S. Gulf	Japan	Heavy grain	Jun 1/10, 2022	50,000	89.65
U.S. Gulf	Japan	Heavy grain	May 1/20, 2022	50,000	78.90
U.S. Gulf	S. China	Corn	Aug 1/10, 2022	68,000	71.00
U.S. Gulf	Kenya	Sorghum	Feb 15/25, 2023	22,820	63.30*
U.S. Gulf	Djibouti	Wheat	Nov 5/15, 2022	22,500	102.88*
U.S. Gulf	S. Korea	Heavy grain	Jun 1/Jul, 2022	55,000	82.75
WC US	Japan	Wheat	Feb 1/Mar 1, 2023	34,500	47.75
Brazil	China	Heavy grain	Feb 4/11	63,000	36.00
Brazil	N. China	Heavy grain	Mar 18/27, 2022	64,000	56.85
Argentina	Taiwan	Corn	May 1/Jun, 2022	65,000	85.00
Australia	Vietnam	Heavy grain	Feb 24/Apr 9, 2023	60,000	20.80

*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

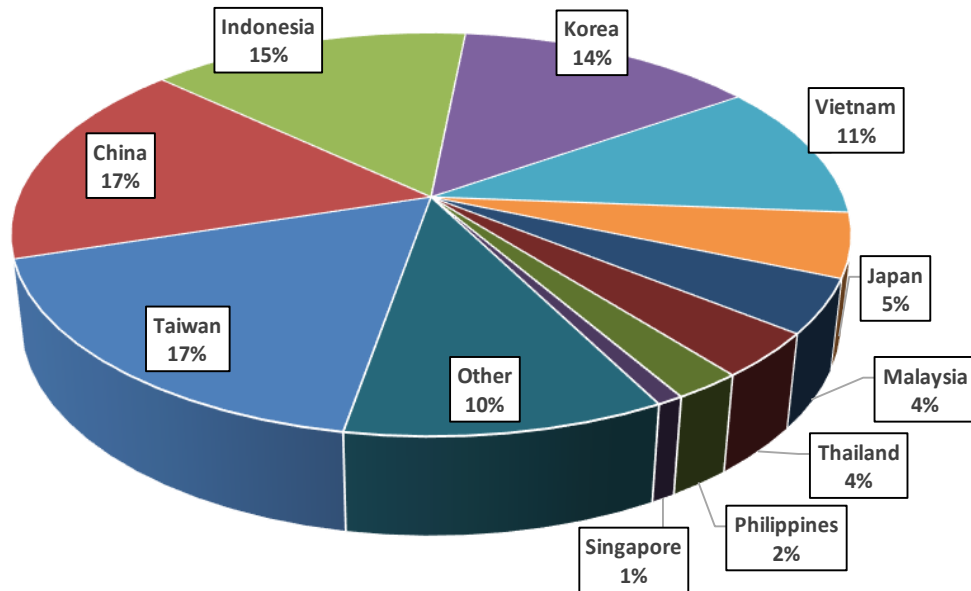
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Source: Maritime Research, Inc.

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 17

Top 10 destination markets for U.S. containerized grain exports, Jan-Nov 2022

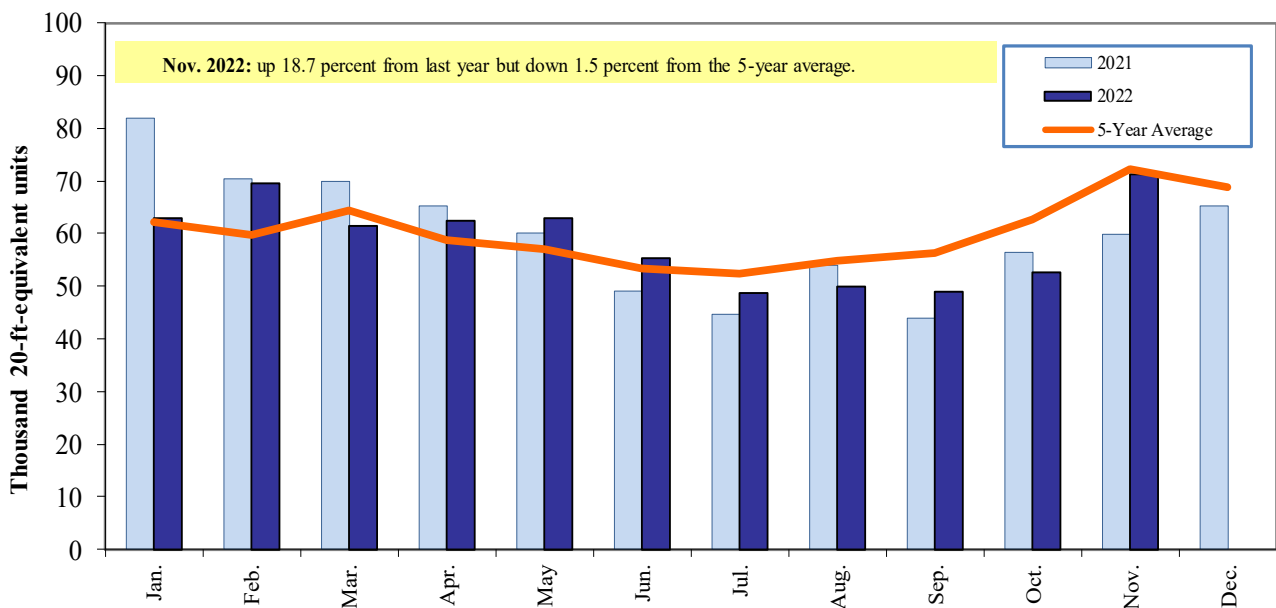


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '230330', '2304', and '230990'.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 18

Monthly shipments of U.S. containerized grain exports



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, Transportation Services Division analysis of PIERS data.

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