



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service  
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## WEEKLY HIGHLIGHTS

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#### FMC Proposes Requiring Free Access to Carriers' Tariff Information

A new notice of proposed rulemaking (NPRM) by the Federal Maritime Commission (FMC) [seeks public comment](#), on or before June 9, on whether carriers should be required to post their tariffs online and allow access to this information, free of charge. Seven of the 10 leading ocean carriers serving the United States already provide this service. FMC believes requiring universal free tariff publication would benefit trade by giving shippers more pricing information to consider. In the same NPRM, FMC proposes changing its definition of co-loading to apply only to less-than-container loads. Furthermore, FMC proposes that documentation for full-container-load shipments be annotated with the names of all non-vessel operating common carriers (NVOCCs) associated with the container's cargo. Three other proposed changes in the NPRM would allow NVOCCs to cross-reference certain aspects of other carriers' terms in their tariffs; clarify the ability of NVOCCs to reflect increases in certain charges passed on by other entities without notice; and make other miscellaneous updates and clarifications to current FMC code.

#### Latest USDA Projections Signal Lower Demand for Grain Transportation in MY 2022/23

On May 12, USDA released its [May World Agricultural Supply and Demand Estimates report](#), which contains the agency's most recent projections—the first update since February—for the next marketing year (MY), 2022/23. If realized, projected MY 2022/23 soybean production would be a record 4.64 billion bushels. Even when combined with wheat production that is estimated to exceed MY 2021/22, total production of grain (corn, soybeans, and wheat) is projected to decrease 2 percent from MY 2021/22 to MY 2022/23. Domestic use and exports are projected to slip for corn and wheat, but to increase for soybeans. Domestic use and exports of the three crops combined are predicted to decrease 2 percent and 1 percent, respectively, in MY 2022/23 from 2021/22. Such declines would dampen the demand for grain transportation.

#### FMCSA Expands Emergency HOS Waiver to Cover Propane

On May 13, the Federal Motor Carrier Safety Administration (FMCSA) [added propane](#), which is used for grain drying, to its list of qualifying items in support of emergency relief efforts. First issued in March 2020 for the COVID-19 pandemic, FMCSA's emergency declaration offers regulatory relief for truckers who provide direct assistance. This includes some relief from standard hours-of-service (HOS) regulations. Though modified several times, the emergency declaration, has remained in effect for more than 2 years. The most recent extension is set to expire on May 31 and covers feed, ethanol, and fuel.

### Snapshots by Sector

#### Export Sales

For the week ending May 05, [unshipped balances](#) of wheat, corn, and soybeans for marketing year 2021/22 totaled 29.6 million metric tons (mmt), down 1 percent from the same time last year and down 6 percent from the previous week. Net [corn export sales](#) were 0.193 mmt, down 75 percent from the previous week. Net [soybean export sales](#) were 0.144 mmt, down 80 percent from the previous week. Net weekly [wheat export sales](#) were 0.014 mmt, down 88 percent from the previous week.

#### Rail

U.S. Class I railroads originated 22,402 [grain carloads](#) during the week ending May 7. This was a 5-percent increase from the previous week, 11 percent fewer than last year, and 3 percent lower than the 3-year average.

Average May shuttle [secondary railcar](#) bids/offers (per car) were \$2,425 above tariff for the week ending May 12. This was \$582 less than last week and \$2,546 more than this week last year.

#### Barge

For the week ending May 14, [barged grain movements](#) totaled 835,730 tons. This was 7 percent lower than the previous week and 4 percent lower than the same period last year.

For the week ending May 14, 513 grain barges [moved down river](#)—36 fewer barges than the previous week. There were 683 grain barges [unloaded](#) in the New Orleans region, 15 percent more than last week.

#### Ocean

For the week ending May 12, 32 [oceangoing grain vessels](#) were loaded in the Gulf—6 percent fewer than the same period last year. Within the next 10 days (starting May 13), 50 vessels were expected to be loaded—9 percent fewer than the same period last year.

As of May 12, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$82.00. This was 3 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$46.50 per mt, 4 percent more than the previous week.

#### Fuel

For the week ending May 16, the U.S. average [diesel fuel price](#) decreased 1.0 cents from the previous week to \$5.613 per gallon, 236.4 cents above the same week last year.

# Feature Article/Calendar

## A Review and Outlook on Ongoing Rail Service Issues

Over the past few months, rail shippers (including agricultural shippers) have raised strong concerns over increasingly poor service. Despite garnering heightened attention across the industry and from multiple Federal agencies, rail service has not yet shown signs of improvement. This article describes the latest rail service data and highlights recent actions the Surface Transportation Board (STB) has taken to address service issues.

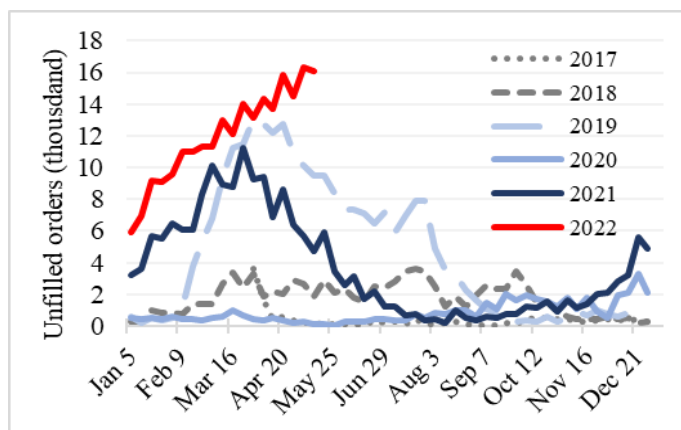
### *Metrics Tell the Story*

A shortage of labor and locomotive power has resulted in cascading problems through agricultural rail supply chains. Elevators report they have grain to move and cannot purchase more from farmers because of a lack of outbound train service. This bottleneck, in turn, has jeopardized downstream customers—such as flour and feed mills and livestock operations—that cannot obtain the grain they need.<sup>1</sup> **GTR figure 3** shows the moving average of grain carloads has declined for a few months, falling below the 3-year average in recent weeks. According to STB rail service data, fertilizer shipments, like grain carloads, have declined in recent weeks, despite normally peaking at this time of year. Fertilizer shippers have complained of railroads restricting their shipments.<sup>2</sup> For the week ending May 11, fertilizer shipments were 12 percent below the 2018-21 average for the same week. Further reflecting service failures, the average dwell time in an origination yard was 68 percent above average for grain trains and 128 percent above average for ethanol trains. Ethanol shippers report having to slow or even shut down their plants because of poor rail service.<sup>3</sup>

**FMLM.** Since the implementation of Precision Scheduled Railroading (PSR), starting in 2017, rail shippers have expressed concern over rail service on the first- and last-mile (FMLM) portions of shipments, where railroads and shippers interact.<sup>4</sup> Notably, STB’s existing rail service metrics do not capture many aspects of FMLM service. However, FMLM service is partly captured with one metric: the number of empty cars shippers have ordered that railroads have not yet filled. This year, the number of unfilled grain car orders (for manifest service) has been at its highest level since STB’s data collection started in 2017. In the latest week of data, unfilled orders were 265 percent above average (fig. 1).

**Secondary market.** Shippers using common (public tariff, non-contract) rail carriage can order rail cars in a few different ways. For instance, they can order them on a queued, first-come-first-served basis or through a lottery. Alternatively, for shippers to better ensure they receive the cars they need, some turn to the railcar auction markets. Shippers make bids either directly to the railroads that offer cars in primary auction markets, or to other shippers in the secondary market. Rates in the secondary market show how much

**Figure 1. Weekly unfilled orders for grain cars in manifest service**



Source: USDA, Agricultural Marketing Service analysis of Surface Transportation Board rail service metrics.

<sup>1</sup> [March 24, 2022, letter](#) from the National Grain and Feed Association to the STB Chair.

<sup>2</sup> [April 14, 2022, press release](#) from CF Industries, “Union Pacific Curtails Fertilizer Shipments, Delaying Deliveries and Preventing New Rail Orders from Being Taken.”

<sup>3</sup> [“Renewable Fuels” presentation](#) at STB’s April 20, 2022, Rail Energy Transportation Advisory Committee meeting.

<sup>4</sup> For example, at STB’s May 22, 2019 Oversight Hearing on Demurrage and Accessorial Charges, shippers and their associations described FMLM as the “challenge,” where Class I railroads are “struggling,” and the “root cause to a lot of the issues.”

shippers are willing to pay for the certainty of guaranteed car service, compared to the uncertainty of obtaining cars in the queue or lottery. Rates in the secondary market have been extremely high in recent months. In the latest week of data, bids for shuttle train service in May on Union Pacific reached \$4,300 ([table 6](#)). For a shuttle train shipment from Iowa to California, that number represents a roughly 80-percent increase in the cost of rail service ([table 7](#)).

### *STB Fosters Communication and Takes Up Reform*

**Public hearings and testimony.** Concerned about poor rail service, the [USDA Secretary wrote to STB on March 30](#) urging immediate action to address significant rail service issues for agriculture. At a public STB hearing on rail service issues (April 26-27), the USDA Deputy Secretary's [testimony](#) detailed the issues experienced by agricultural rail shippers. She recommended railroads face heavier penalties for poor rail service, and urged STB to finalize several open proceedings that would incentivize railroads to provide better service.

Railroads have stated they are committed to restoring service. For example, BNSF's CEO said the company is taking "aggressive measures" to restore service, and Norfolk Southern's CEO said "restor[ing] service to the quality our customers expect and deserve" is the company's top priority.<sup>5</sup> However, some—including some shippers, analysts, and STB members—are skeptical that service issues will turn around soon. At the STB hearing, rail labor expressed grave concern over railroads' PSR-related workforce cuts and new "draconian" attendance policies. Train crews take time to recruit and train, and without sufficient labor, rail service will struggle to improve. In his [May 12 written testimony](#) before the House Committee on Transportation and Infrastructure, the STB Chair noted "Given the challenges the railroads now recount regarding hiring and retaining employees ... I am not optimistic about significant improvement in rail service in the near term." Analysts at the April STB hearing suggested service could remain poor through the rest of 2022 and possibly into 2023. Such delayed improvement would affect the upcoming wheat, corn, and soybean harvests.

**STB initiatives toward reform.** STB has been actively seeking to restore service as soon as possible. On April 22, STB proposed new emergency service rules to facilitate shippers' obtaining directed service in emergencies.<sup>6</sup> In addition, on May 6, STB required the four largest Class I railroads to provide service recovery plans on May 20 and to meet with STB every 2 weeks. The plans will explain the specific actions each carrier will take to improve service. Additionally, weekly, all seven Class I carriers will have to submit a number of new service metrics starting May 18. These include (but are not limited to) data on terminal dwell times at 10 additional locations; shares of scheduled services that were fulfilled; and shares of cars dropped off within 24 hours of the estimated time of arrival.

STB also has open proceedings that could increase incentives for railroads to provide better service over the long term. For example, in March, STB held a public hearing on reciprocal switching and is considering collecting FMLM data. Further, on April 1, STB initiated a proceeding to examine a proposal to charge railroads demurrage-like fees for inefficient car use.<sup>7</sup> The agency also has important open proceedings aimed at making rate review more accessible in small disputes. In his May 12 written testimony, the STB Chair expressed hope about potential decisions STB may issue fairly soon: he hopes STB will act on its rate review proceedings by this fall and on reciprocal switching by the end of the year.

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<sup>5</sup> *Trains* May 11, 2022, article, "BNSF Taking 'Aggressive Measures' To Restore Service, Farmer Says." Also, Norfolk Southern May 12, 2022, press release, "Norfolk Southern CEO Shares Customer-Centric and Operations-Driven Vision With Shareholders."

<sup>6</sup> Comments are due May 23 and replies by June 6.

<sup>7</sup> Comments are due June 30 and replies by August 1.

# Grain Transportation Indicators

Table 1

## Grain transport cost indicators<sup>1</sup>

| For the week ending | Truck | Rail        |         | Barge | Ocean |         |
|---------------------|-------|-------------|---------|-------|-------|---------|
|                     |       | Non-Shuttle | Shuttle |       | Gulf  | Pacific |
| 05/18/22            | 377   | 318         | 308     | 259   | 367   | 330     |
| 05/11/22            | 377   | 318         | 324     | 291   | 356   | 316     |

<sup>1</sup>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.

Table 2

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

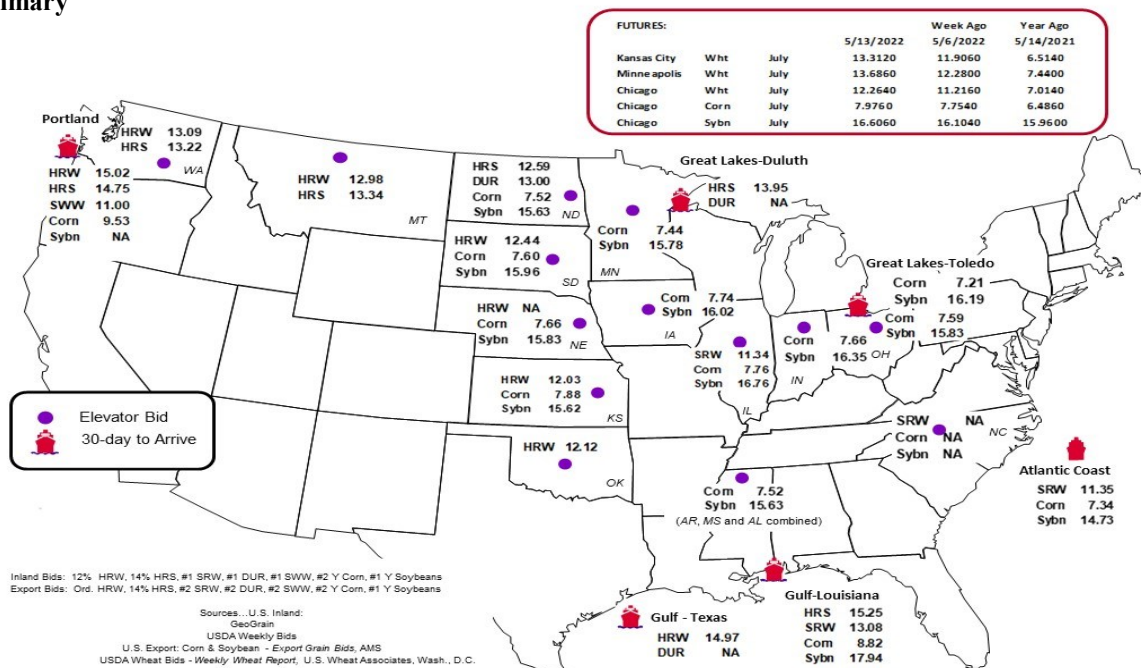
| Commodity | Origin-destination | 5/13/2022 | 5/6/2022 |
|-----------|--------------------|-----------|----------|
| Corn      | IL-Gulf            | -1.06     | -1.03    |
| Corn      | NE-Gulf            | -1.16     | -1.08    |
| Soybean   | IA-Gulf            | -1.92     | -1.78    |
| HRW       | KS-Gulf            | -2.94     | -3.02    |
| HRS       | ND-Portland        | -2.16     | -2.14    |

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  
**Rail deliveries to port (carloads)<sup>1</sup>**

| For the week ending                           | Mississippi |            | Pacific   | Atlantic & |  | Total   | Week ending        | Cross-border Mexico <sup>3</sup> |
|---|-------------|------------|-----------|------------|--|---------|--------------------|----------------------------------|
|   | Gulf        | Texas Gulf | Northwest | East Gulf  |  |         |                    |                                  |
| 5/11/2022 <sup>P</sup>                        | 1,246       | 770        | 6,590     | 459        |  | 9,065   | 5/7/2022           | 2,699                            |
| 5/4/2022 <sup>r</sup>                         | 953         | 903        | 5,788     | 725        |  | 8,369   | 4/30/2022          | 2,762                            |
| 2022 YTD <sup>r</sup>                         | 29,662      | 19,079     | 112,202   | 10,847     |  | 171,790 | 2022 YTD           | 51,197                           |
| 2021 YTD <sup>r</sup>                         | 29,983      | 30,337     | 122,206   | 9,579      |  | 192,105 | 2021 YTD           | 46,467                           |
| 2022 YTD as % of 2021 YTD                     | 99          | 63         | 92        | 113        |  | 89      | % change YTD       | 110                              |
| Last 4 weeks as % of 2021 <sup>2</sup>        | 114         | 70         | 88        | 247        |  | 92      | Last 4wks. % 2021  | 96                               |
| Last 4 weeks as % of 4-year avg. <sup>2</sup> | 177         | 89         | 97        | 147        |  | 105     | Last 4wks. % 4 yr. | 105                              |
| Total 2021                                    | 54,982      | 69,213     | 311,407   | 22,567     |  | 458,169 | Total 2021         | 147,859                          |
| Total 2020                                    | 45,294      | 64,116     | 299,882   | 24,458     |  | 433,750 | Total 2020         | 128,714                          |

<sup>1</sup>Data is incomplete as it is voluntarily provided.

<sup>2</sup> Compared with same 4-weeks in 2021 and prior 4-year average.

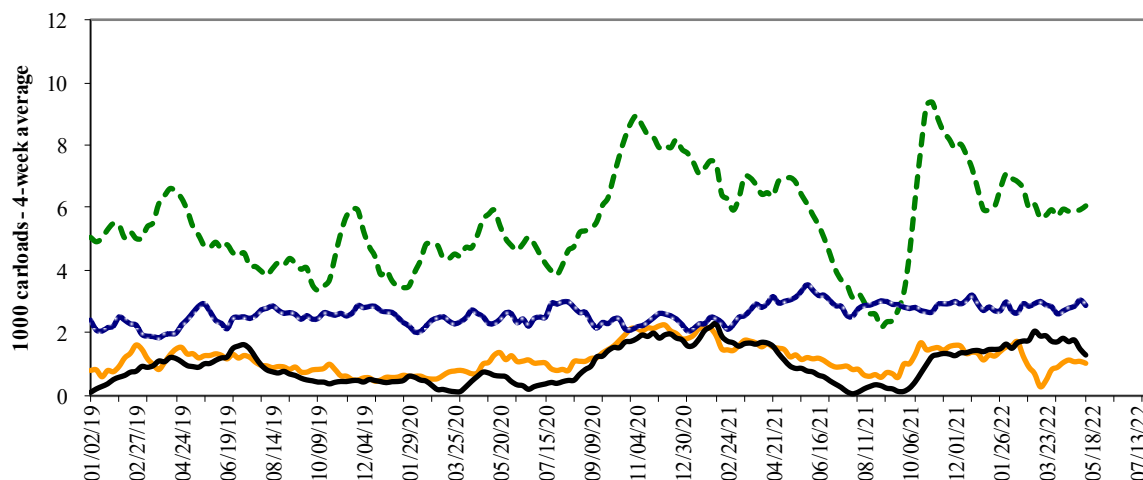
<sup>3</sup> Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.**

Source: USDA, Agricultural Marketing Service.

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2  
**Rail deliveries to port**



--- Pacific Northwest: 4 weeks ending 5/11—down 12% from same period last year; down 3% from the 4-year average.  
--- Texas Gulf: 4 weeks ending 5/11—down 30% from same period last year; down 11% from the 4-year average.  
--- Mississippi River: 4 weeks ending 5/11—up 14% from same period last year; up 77% from the 4-year average.  
--- Cross-border: 4 weeks ending 5/7—down 4% from same period last year; up 5% from the 4-year average.

Source: USDA, Agricultural Marketing Service.



Table 4

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

| For the week ending:<br>5/7/2022  | East   |         | West    |        |         | U.S. total | Canada  |         |
|-----------------------------------|--------|---------|---------|--------|---------|------------|---------|---------|
|                                   | CSXT   | NS      | BNSF    | KCS    | UP      |            | CN      | CP      |
| This week                         | 1,593  | 2,604   | 11,926  | 931    | 5,348   | 22,402     | 3,146   | 3,485   |
| This week last year               | 1,674  | 2,939   | 13,018  | 707    | 6,877   | 25,215     | 5,045   | 5,717   |
| 2022 YTD                          | 33,251 | 41,918  | 209,532 | 22,237 | 107,368 | 414,306    | 63,365  | 66,909  |
| 2021 YTD                          | 36,074 | 46,703  | 237,507 | 18,867 | 119,352 | 458,503    | 89,181  | 98,957  |
| 2022 YTD as % of 2021 YTD         | 92     | 90      | 88      | 118    | 90      | 90         | 71      | 68      |
| Last 4 weeks as % of 2021*        | 94     | 92      | 81      | 94     | 76      | 82         | 70      | 58      |
| Last 4 weeks as % of 3-yr. avg.** | 97     | 90      | 92      | 98     | 86      | 91         | 69      | 64      |
| Total 2021                        | 93,935 | 120,914 | 609,890 | 64,818 | 318,002 | 1,207,559  | 210,216 | 242,533 |

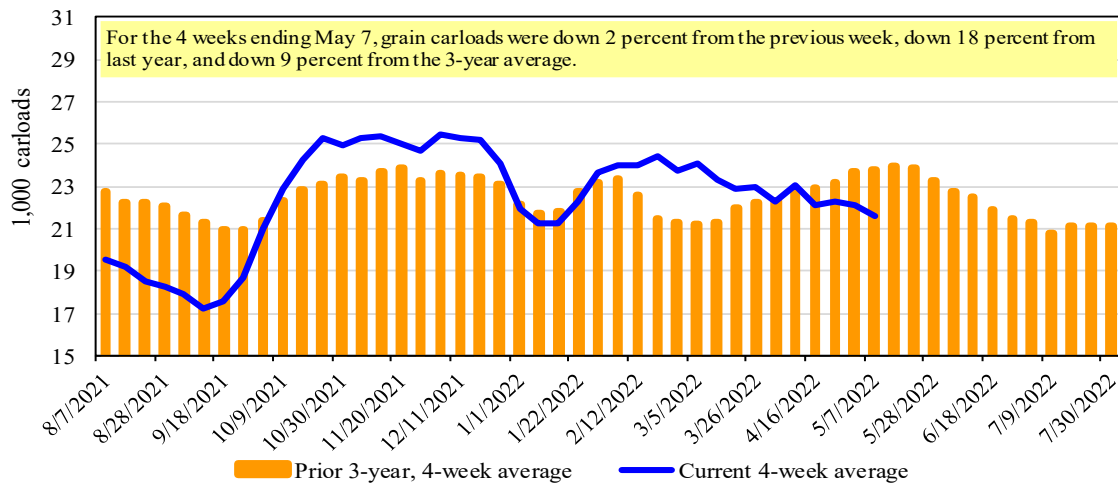
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*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 3

**Total weekly U.S. Class I railroad grain carloads**

Source: Association of American Railroads.

Table 5

**Railcar auction offerings<sup>1</sup> (\$/car)<sup>2</sup>**

| For the week ending:<br>5/12/2022 |                      | Delivery period |          |          |          |          |          |         |        |
|-----------------------------------|----------------------|-----------------|----------|----------|----------|----------|----------|---------|--------|
|                                   |                      | May-22          | May-21   | Jun-22   | Jun-21   | Jul-22   | Jul-21   | Aug-22  | Aug-21 |
| BNSF <sup>3</sup>                 | COT grain units      | no offer        | no offer | no offer | no bids  | no bids  | no bids  | no bids | 0      |
|                                   | COT grain single-car | no offer        | no offer | no offer | 0        | 0        | 0        | 0       | 0      |
| UP <sup>4</sup>                   | 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    |

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

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

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

<sup>4</sup>UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

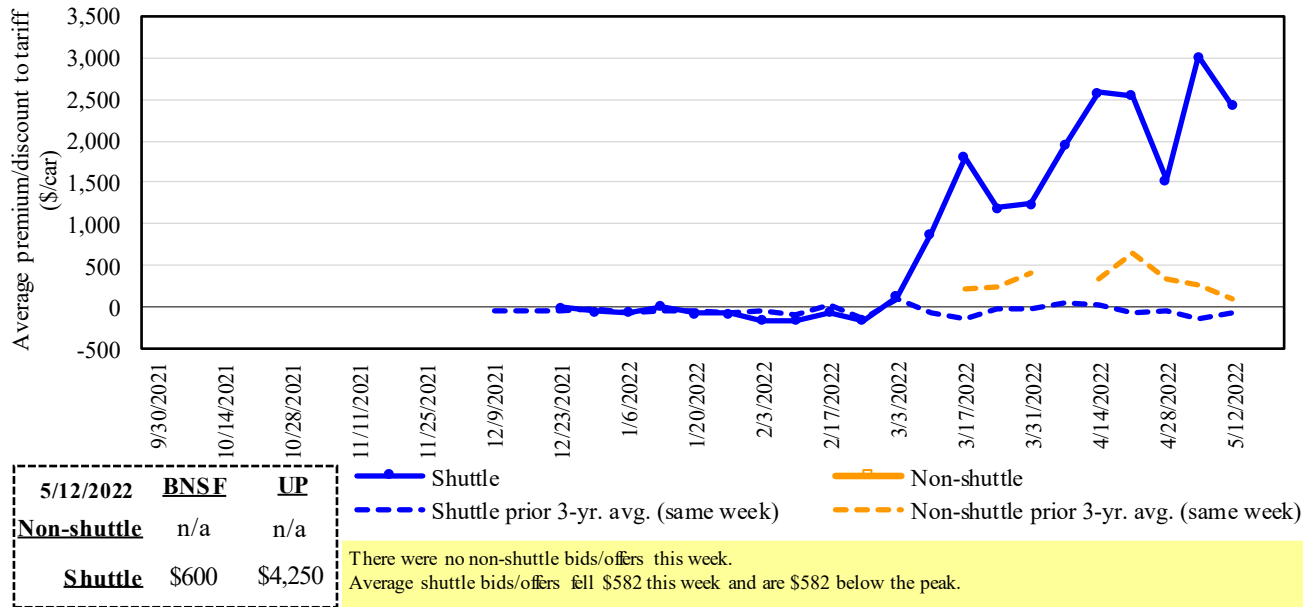
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

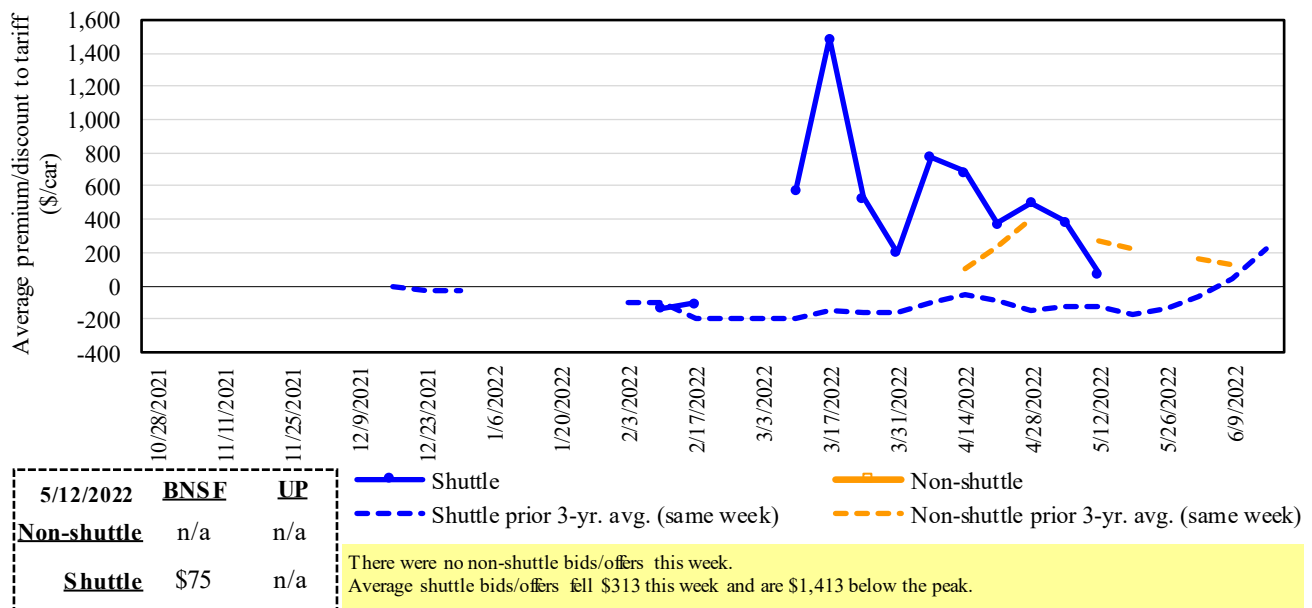
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

**Figure 4**  
**Secondary market bids/offers for railcars to be delivered in May 2022**



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.

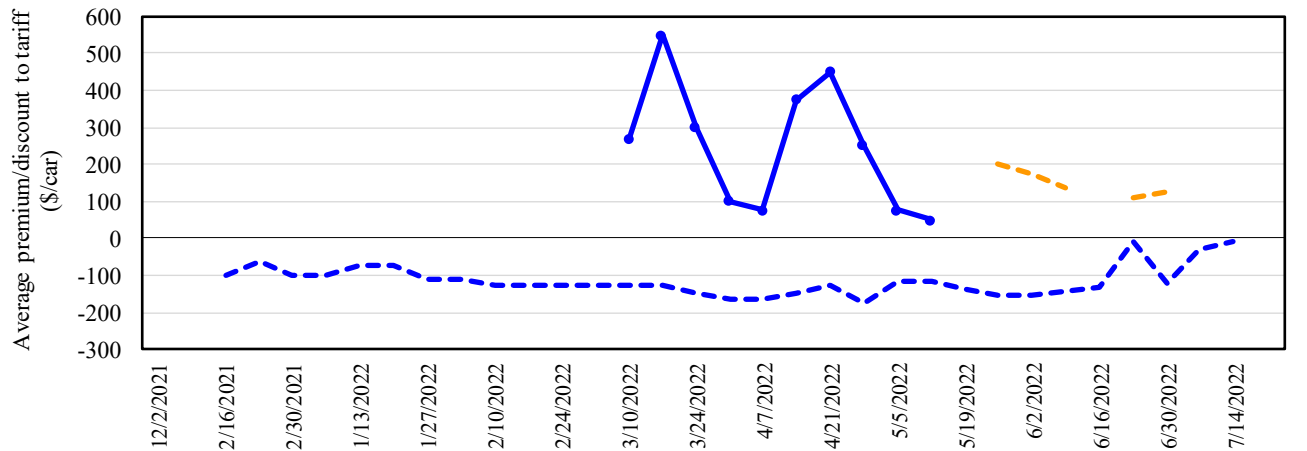
**Figure 5**  
**Secondary market bids/offers for railcars to be delivered in June 2022**



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 6

Secondary market bids/offers for railcars to be delivered in July 2022



|                    |             |           |
|--------------------|-------------|-----------|
| 5/12/2022          | <b>BNSF</b> | <b>UP</b> |
| <b>Non-shuttle</b> | n/a         | n/a       |
| <b>Shuttle</b>     | \$50        | 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.  
 Average shuttle bids/offers fell \$25 this week and are \$500 below the peak.

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 6

Weekly secondary railcar market (\$/car)<sup>1</sup>

| For the week ending: |                            | Delivery period |            |            |              |            |              |
|----------------------|----------------------------|-----------------|------------|------------|--------------|------------|--------------|
|                      |                            | May-22          | Jun-22     | Jul-22     | Aug-22       | Sep-22     | Oct-22       |
| Non-shuttle          | <b>BNSF-GF</b>             | 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 2021 | n/a             | n/a        | n/a        | n/a          | n/a        | n/a          |
|                      | <b>UP-Pool</b>             | 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 2021 | n/a             | n/a        | n/a        | n/a          | n/a        | n/a          |
| Shuttle              | <b>BNSF-GF</b>             | <b>600</b>      | <b>75</b>  | <b>50</b>  | <b>(100)</b> | <b>100</b> | <b>1,600</b> |
|                      | Change from last week      | (1,059)         | (200)      | (25)       | (50)         | (200)      | n/a          |
|                      | Change from same week 2021 | 608             | 250        | 263        | 144          | (163)      | 417          |
|                      | <b>UP-Pool</b>             | <b>4,250</b>    | <b>n/a</b> | <b>n/a</b> | <b>n/a</b>   | <b>n/a</b> | <b>1,000</b> |
|                      | Change from last week      | (104)           | n/a        | n/a        | n/a          | n/a        | n/a          |
|                      | Change from same week 2021 | 4,483           | n/a        | n/a        | n/a          | n/a        | 75           |

<sup>1</sup> 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 7

**Tariff rail rates for unit and shuttle train shipments<sup>1</sup>**

| May 2022             | Origin region <sup>3</sup> | Destination region <sup>3</sup> | Tariff rate/car | Fuel surcharge per car | Tariff plus surcharge per: |                     | Percent change Y/Y <sup>4</sup> |
|----------------------|----------------------------|---------------------------------|-----------------|------------------------|----------------------------|---------------------|---------------------------------|
|                      |                            |                                 |                 |                        | metric ton                 | bushel <sup>2</sup> |                                 |
| <b>Unit train</b>    |                            |                                 |                 |                        |                            |                     |                                 |
| Wheat                | Wichita, KS                | St. Louis, MO                   | \$3,695         | \$309                  | \$39.76                    | \$1.08              | 5                               |
|                      | Grand Forks, ND            | Duluth-Superior, MN             | \$3,658         | \$0                    | \$36.33                    | \$0.99              | -13                             |
|                      | Wichita, KS                | Los Angeles, CA                 | \$7,290         | \$0                    | \$72.39                    | \$1.97              | 2                               |
|                      | Wichita, KS                | New Orleans, LA                 | \$4,436         | \$543                  | \$49.44                    | \$1.35              | 5                               |
|                      | Sioux Falls, SD            | Galveston-Houston, TX           | \$7,026         | \$0                    | \$69.77                    | \$1.90              | 3                               |
|                      | Colby, KS                  | Galveston-Houston, TX           | \$4,712         | \$595                  | \$52.70                    | \$1.43              | 6                               |
|                      | Amarillo, TX               | Los Angeles, CA                 | \$5,121         | \$828                  | \$59.07                    | \$1.61              | 10                              |
| Corn                 | Champaign-Urbana, IL       | New Orleans, LA                 | \$4,000         | \$614                  | \$45.82                    | \$1.16              | 12                              |
|                      | Toledo, OH                 | Raleigh, NC                     | \$8,130         | \$671                  | \$87.40                    | \$2.22              | 12                              |
|                      | Des Moines, IA             | Davenport, IA                   | \$2,505         | \$130                  | \$26.17                    | \$0.66              | 5                               |
|                      | Indianapolis, IN           | Atlanta, GA                     | \$6,227         | \$504                  | \$66.84                    | \$1.70              | 13                              |
|                      | Indianapolis, IN           | Knoxville, TN                   | \$5,247         | \$326                  | \$55.34                    | \$1.41              | 11                              |
|                      | Des Moines, IA             | Little Rock, AR                 | \$4,000         | \$382                  | \$43.51                    | \$1.11              | 9                               |
|                      | Des Moines, IA             | Los Angeles, CA                 | \$5,880         | \$1,112                | \$69.43                    | \$1.76              | 13                              |
| Soybeans             | Minneapolis, MN            | New Orleans, LA                 | \$4,431         | \$951                  | \$53.44                    | \$1.45              | 40                              |
|                      | Toledo, OH                 | Huntsville, AL                  | \$6,714         | \$478                  | \$71.42                    | \$1.94              | 9                               |
|                      | Indianapolis, IN           | Raleigh, NC                     | \$7,422         | \$680                  | \$80.46                    | \$2.19              | 14                              |
|                      | Indianapolis, IN           | Huntsville, AL                  | \$5,367         | \$323                  | \$56.50                    | \$1.54              | 8                               |
| Champaign-Urbana, IL | New Orleans, LA            | \$4,665                         | \$614           | \$52.42                | \$1.43                     | 8                   |                                 |
| <b>Shuttle train</b> |                            |                                 |                 |                        |                            |                     |                                 |
| Wheat                | Great Falls, MT            | Portland, OR                    | \$4,193         | \$0                    | \$41.64                    | \$1.13              | 4                               |
|                      | Wichita, KS                | Galveston-Houston, TX           | \$4,411         | \$0                    | \$43.80                    | \$1.19              | 4                               |
|                      | Chicago, IL                | Albany, NY                      | \$6,670         | \$633                  | \$72.53                    | \$1.97              | 15                              |
|                      | Grand Forks, ND            | Portland, OR                    | \$5,851         | \$0                    | \$58.10                    | \$1.58              | 3                               |
|                      | Grand Forks, ND            | Galveston-Houston, TX           | \$5,199         | \$0                    | \$51.63                    | \$1.41              | -13                             |
|                      | Colby, KS                  | Portland, OR                    | \$5,923         | \$975                  | \$68.50                    | \$1.86              | 8                               |
|                      | Corn                       | Minneapolis, MN                 | Portland, OR    | \$5,380                | \$0                        | \$53.43             | \$1.36                          |
| Sioux Falls, SD      |                            | Tacoma, WA                      | \$5,340         | \$0                    | \$53.03                    | \$1.35              | 4                               |
| Champaign-Urbana, IL |                            | New Orleans, LA                 | \$3,920         | \$614                  | \$45.02                    | \$1.14              | 12                              |
| Lincoln, NE          |                            | Galveston-Houston, TX           | \$4,080         | \$0                    | \$40.52                    | \$1.03              | 5                               |
| Des Moines, IA       |                            | Amarillo, TX                    | \$4,420         | \$480                  | \$48.66                    | \$1.24              | 9                               |
| Minneapolis, MN      |                            | Tacoma, WA                      | \$5,380         | \$0                    | \$53.43                    | \$1.36              | 4                               |
| Council Bluffs, IA   |                            | Stockton, CA                    | \$5,300         | \$0                    | \$52.63                    | \$1.34              | 4                               |
| Soybeans             | Sioux Falls, SD            | Tacoma, WA                      | \$6,050         | \$0                    | \$60.08                    | \$1.64              | 3                               |
|                      | Minneapolis, MN            | Portland, OR                    | \$6,100         | \$0                    | \$60.58                    | \$1.65              | 3                               |
|                      | Fargo, ND                  | Tacoma, WA                      | \$5,950         | \$0                    | \$59.09                    | \$1.61              | 3                               |
|                      | Council Bluffs, IA         | New Orleans, LA                 | \$4,895         | \$708                  | \$55.64                    | \$1.51              | 9                               |
|                      | Toledo, OH                 | Huntsville, AL                  | \$4,954         | \$478                  | \$53.94                    | \$1.47              | 10                              |
| Grand Island, NE     | Portland, OR               | \$5,280                         | \$999           | \$62.35                | \$1.70                     | 12                  |                                 |

<sup>1</sup>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.

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

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

<sup>4</sup>Percentage 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 8

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

| Date: December 2021 |                 |                      | Tariff rate<br>per car <sup>1</sup> | Fuel<br>surcharge<br>per car <sup>2</sup> | Tariff rate plus<br>fuel surcharge per: |                     | Percent<br>change <sup>4</sup><br>Y/Y |
|---------------------|-----------------|----------------------|-------------------------------------|---|---|---------------------|---------------------------------------|
| Commodity           | Origin<br>state | Destination region   |                                     |   | metric ton <sup>3</sup>                 | bushel <sup>3</sup> |                                       |
| 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                                     |

<sup>1</sup>Rates 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.

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

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

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

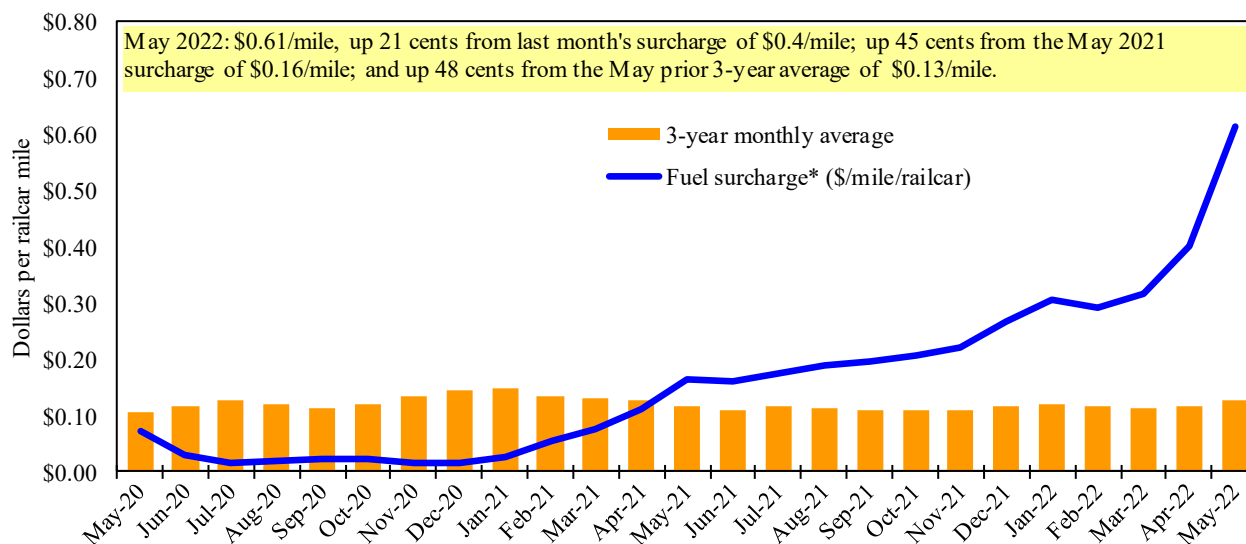
<sup>5</sup> As of January 1, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico.

As we incorporate the change, Table 8 updates will be delayed.

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

Figure 7

**Railroad fuel surcharges, North American weighted average<sup>1</sup>**



<sup>1</sup> Weighted 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.

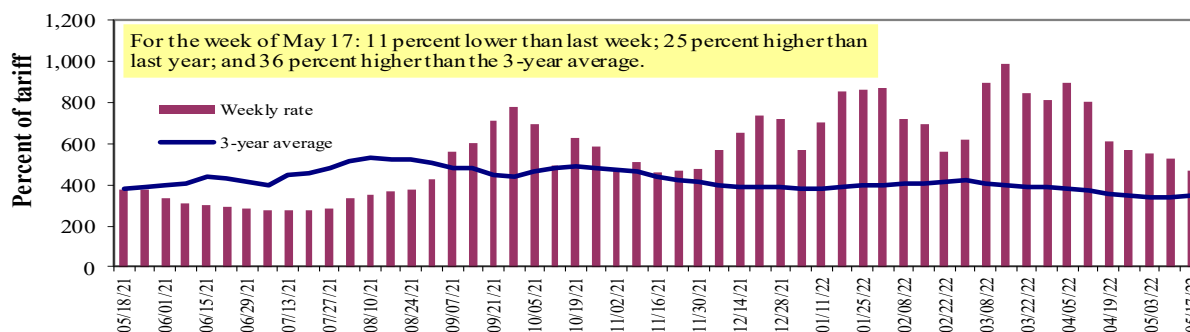
\*\* CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

# Barge Transportation

Figure 8

## Illinois River barge freight rate<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.  
\*Source: USDA, Agricultural Marketing Service.

Table 9

## Weekly barge freight rates: Southbound only

|  |                          | Twin Cities | Mid-Mississippi | Lower Illinois River | St. Louis | Cincinnati | Lower Ohio | Cairo-Memphis |
|--|--------------------------|-------------|-----------------|----------------------|-----------|------------|------------|---------------|
| <b>Rate<sup>1</sup></b>                          | 5/17/2022                | 572         | 512             | 467                  | 342       | 452        | 452        | 329           |
|  | 5/10/2022                | 665         | 580             | 523                  | 383       | 495        | 495        | 346           |
| <b>\$/ton</b>                                    | 5/17/2022                | 35.41       | 27.24           | 21.67                | 13.65     | 21.20      | 18.26      | 10.33         |
|  | 5/10/2022                | 41.16       | 30.86           | 24.27                | 15.28     | 23.22      | 20.00      | 10.86         |
| <b>Current week % change from the same week:</b> |                          |             |                 |                      |           |            |            |               |
|  | Last year                | 27          | 34              | 25                   | 23        | 66         | 66         | 32            |
|  | 3-year avg. <sup>2</sup> | 48          | 59              | 36                   | 43        | 74         | 74         | 46            |
| <b>Rate<sup>1</sup></b>                          | June                     | 550         | 483             | 460                  | 360       | 433        | 433        | 329           |
|  | August                   | 616         | 581             | 575                  | 513       | 556        | 556        | 519           |

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds; "-" data not available.  
Source: USDA, Agricultural Marketing Service.

## Figure 9 Benchmark tariff rates

**Calculating barge rate per ton:**  
(Rate \* 1976 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

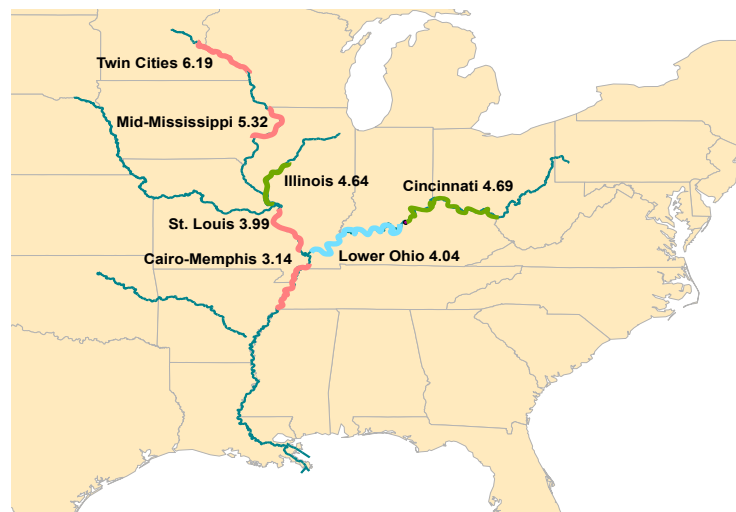
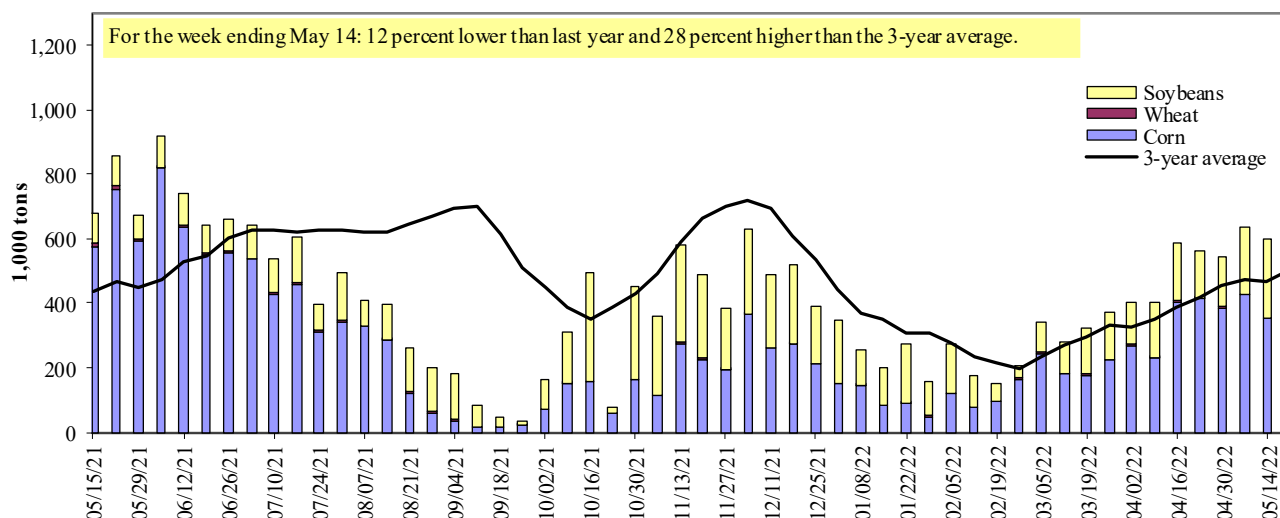


Figure 10

**Barge movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers.

Table 10

**Barge grain movements (1,000 tons)**

| For the week ending 05/14/2022         | Corn   | Wheat | Soybeans | Other | Total  |
|--|--------|-------|----------|-------|--------|
| <b>Mississippi River</b>               |        |       |          |       |        |
| Rock Island, IL (L15)                  | 180    | 0     | 96       | 0     | 277    |
| Winfield, MO (L25)                     | 228    | 0     | 147      | 0     | 375    |
| Alton, IL (L26)                        | 393    | 0     | 254      | 0     | 647    |
| Granite City, IL (L27)                 | 356    | 0     | 241      | 0     | 597    |
| <b>Illinois River (La Grange)</b>      | 108    | 0     | 88       | 0     | 196    |
| <b>Ohio River (Olmsted)</b>            | 107    | 14    | 87       | 2     | 210    |
| <b>Arkansas River (L1)</b>             | 4      | 10    | 15       | 0     | 29     |
| Weekly total - 2022                    | 467    | 24    | 343      | 2     | 836    |
| Weekly total - 2021                    | 689    | 52    | 125      | 3     | 870    |
| 2022 YTD <sup>1</sup>                  | 7,454  | 612   | 4,605    | 125   | 12,795 |
| 2021 YTD <sup>1</sup>                  | 11,120 | 450   | 3,606    | 142   | 15,319 |
| 2022 as % of 2021 YTD                  | 67     | 136   | 128      | 88    | 84     |
| Last 4 weeks as % of 2021 <sup>2</sup> | 75     | 83    | 260      | 131   | 97     |
| Total 2021                             | 23,516 | 1,634 | 11,325   | 297   | 36,772 |

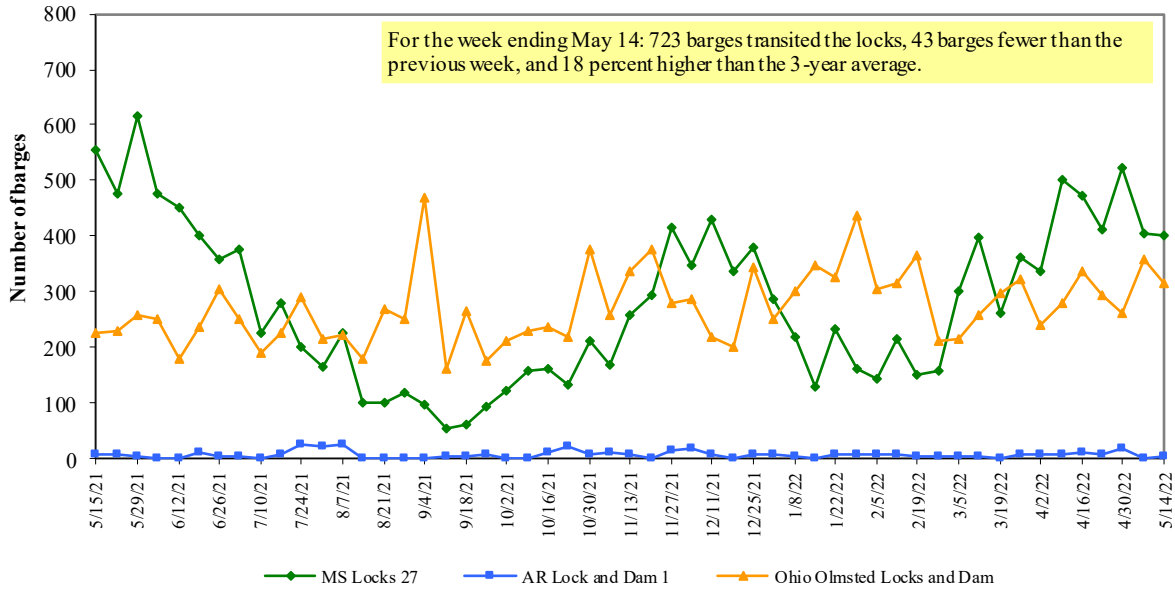
<sup>1</sup> Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

<sup>2</sup> As a percent of same period in 2020.

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

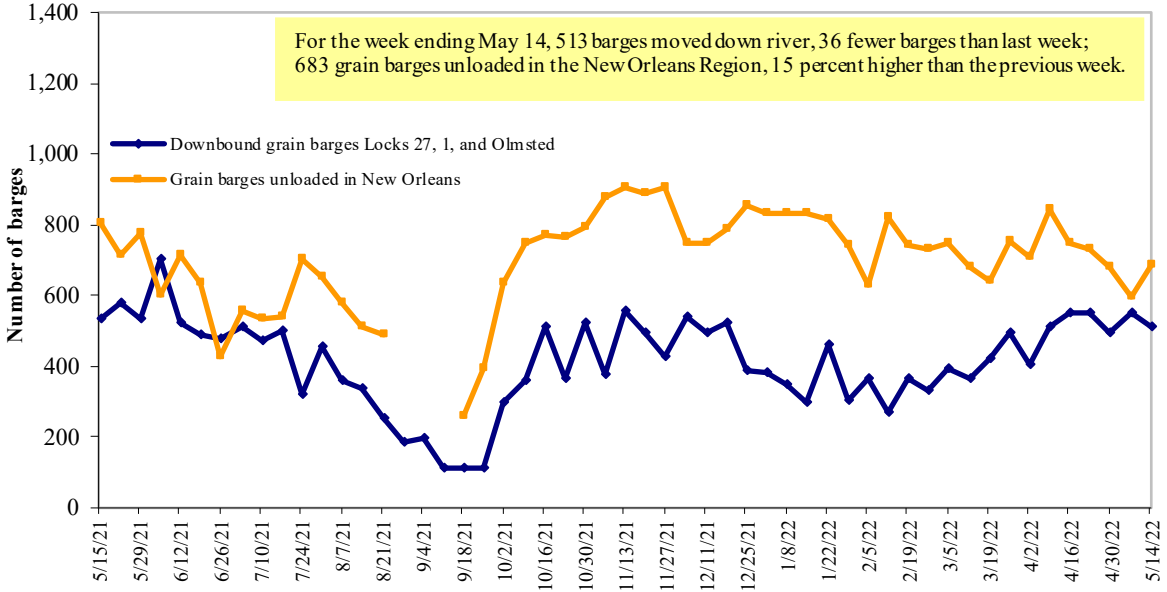
Source: U.S. Army Corps of Engineers.

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



Source: U.S. Army Corps of Engineers.

**Figure 12**  
**Grain barges for export in New Orleans region**



Note: Olmsted = Olmsted Locks and Dam.  
 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 11

**Retail on-highway diesel prices, week ending 5/16/2022 (U.S. \$/gallon)**

| Region | Location                   | Price | Change from |          |
|--------|----------------------------|-------|-------------|----------|
|        |                            |       | Week ago    | Year ago |
| I      | East Coast                 | 5.944 | 0.037       | 2.716    |
|        | New England                | 6.431 | 0.092       | 3.279    |
|        | Central Atlantic           | 6.360 | 0.042       | 2.965    |
|        | Lower Atlantic             | 5.605 | 0.025       | 2.475    |
| II     | Midwest                    | 5.346 | -0.040      | 2.149    |
| III    | Gulf Coast                 | 5.295 | -0.044      | 2.266    |
| IV     | Rocky Mountain             | 5.468 | 0.007       | 2.107    |
|        | West Coast                 | 6.075 | 0.004       | 2.340    |
| V      | West Coast less California | 5.619 | -0.009      | 2.236    |
|        | California                 | 6.477 | 0.016       | 2.448    |
| Total  | United States              | 5.613 | -0.010      | 2.364    |

<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

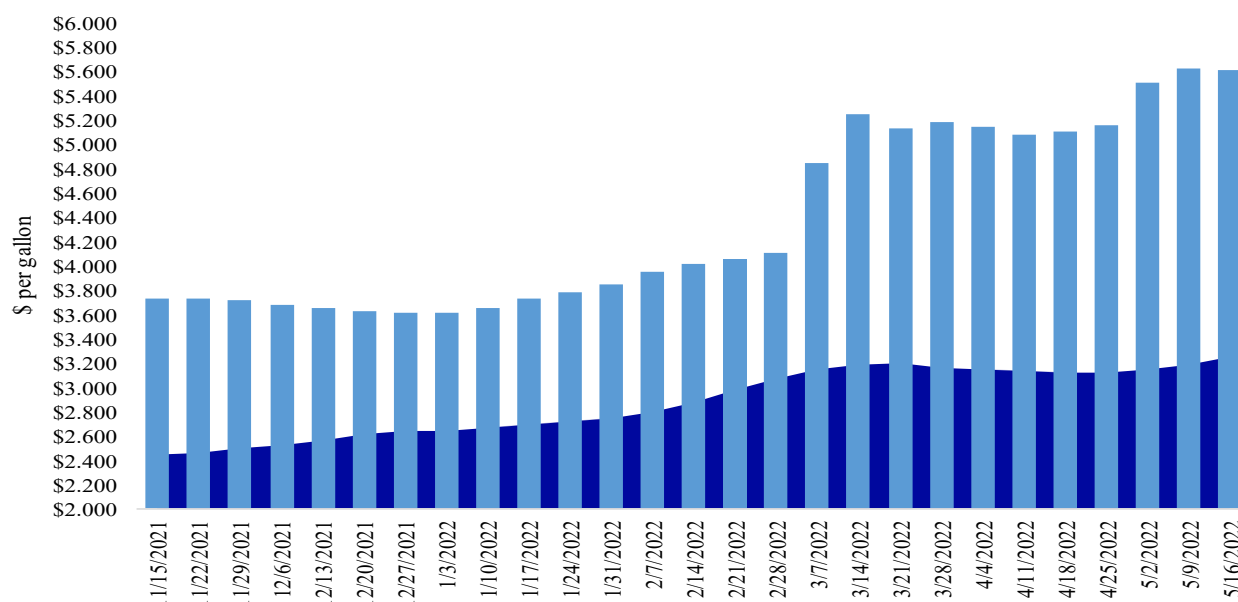
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

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

For the week ending May 16, the U.S. average diesel fuel price decreased 1.0 cents from the previous week to \$5.613 per gallon, 236.4 cents above the same week last year.

■ Last year    ■ Current year  
\$3.249    \$5.613



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.



# Grain Exports

Table 12

## 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 |           |        |          |         |
| <b>Export balances<sup>1</sup></b>                   |       |       |       |       |     |           |        |          |         |
| 5/5/2022   | 751   | 224   | 644   | 296   | 1   | 1,916     | 16,950 | 10,692   | 29,558  |
| This week year ago                                   | 683   | 209   | 875   | 708   | 49  | 2,522     | 22,696 | 4,765    | 29,983  |
| <b>Cumulative exports-marketing year<sup>2</sup></b> |       |       |       |       |     |           |        |          |         |
| 2021/22 YTD  | 6,759 | 2,651 | 4,816 | 3,093 | 196 | 17,514    | 41,541 | 47,764   | 106,818 |
| 2020/21 YTD  | 8,002 | 1,627 | 6,829 | 5,916 | 632 | 23,006    | 45,048 | 56,614   | 124,668 |
| YTD 2021/22 as % of 2020/21                          | 84    | 163   | 71    | 52    | 31  | 76        | 92     | 84       | 86      |
| Last 4 wks. as % of same period 2020/21*             | 136   | 159   | 80    | 44    | 9   | 90        | 82     | 229      | 106     |
| Total 2020/21  | 8,331 | 1,744 | 7,337 | 6,281 | 654 | 24,347    | 66,702 | 60,287   | 151,336 |
| Total 2019/20  | 9,526 | 2,318 | 6,960 | 4,751 | 922 | 24,477    | 42,622 | 43,994   | 111,094 |

<sup>1</sup> Current unshipped (outstanding) export sales to date.

<sup>2</sup> Shipped export sales to date; 2021/22 marketing year now in effect for wheat, corn and soybeans.

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 13

## Top 5 importers<sup>1</sup> of U.S. corn

| For the week ending 05/05/2022                              | Total commitments <sup>2</sup> |                |                | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>3-yr. avg.<br>2019-21 |
|---|--------------------------------|----------------|----------------|--|---|
|   | 2022/23                        | 2021/22        | 2020/21        |  |   |
|   | next MY                        | current MY     | last MY        |  |   |
|   | 1,000 mt -                     |                |                |  |   |
| Mexico  | 1742.6                         | 15,699         | 13,888         | 13                                     | 14,817  |
| Japan   | 501.8                          | 8,979          | 9,819          | (9)                                    | 11,082  |
| China   | 2176                           | 14,636         | 22,910         | (36)                                   | 7,920   |
| Columbia  | 40                             | 4,167          | 3,670          | 14                                     | 4,491   |
| Korea   | 0                              | 1,264          | 3,270          | 0                                      | 3,302   |
| <b>Top 5 importers</b>                                      | <b>4,460</b>                   | <b>44,745</b>  | <b>53,556</b>  | <b>(16)</b>                            | <b>41,613</b>                                 |
| <b>Total U.S. corn export sales</b>                         | <b>4,991</b>                   | <b>58,491</b>  | <b>67,744</b>  | <b>(14)</b>                            | <b>53,145</b>                                 |
| % of projected exports                                      | 8%                             | 92%            | 97%            |  |   |
| Change from prior week <sup>2</sup>                         | 47                             | 193            | (113)          |  |   |
| <b>Top 5 importers' share of U.S. corn<br/>export sales</b> | 89%                            | 76%            | 79%            |  | 78%   |
| <b>USDA forecast May 2022</b>                               | <b>61,069</b>                  | <b>63,613</b>  | <b>70,051</b>  | <b>(9)</b>                             |   |
| <b>Corn use for ethanol USDA forecast,<br/>May 2022</b>     | <b>136,525</b>                 | <b>136,525</b> | <b>127,838</b> | <b>7</b>                               |   |

<sup>1</sup> Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; marketing year (MY) = Sep 1- Aug 31.

<sup>2</sup> Cumulative 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.

<sup>3</sup> FAS marketing year ranking reports (carry over 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 5 importers<sup>1</sup> of U.S. soybeans**

| For the week ending 5/05/2022                                  | Total commitments <sup>2</sup> |                       |                    | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>3-yr. avg.<br>2018-20 |
|--|--------------------------------|-----------------------|--------------------|--|---|
|  | 2022/23<br>next MY             | 2021/22<br>current MY | 2020/21<br>last MY |  |   |
|  |                                |                       |                    |  | - 1,000 mt -                                  |
| China  | 7,298                          | 30,051                | 35,704             | (16)                                   | 21,666  |
| Mexico   | 536                            | 5,115                 | 4,650              | 10                                     | 4,754   |
| Egypt  | 163                            | 3,725                 | 2,670              | 39                                     | 3,093   |
| Indonesia  | 0                              | 1,473                 | 2,015              | (27)                                   | 2,325   |
| Japan  | 43                             | 2,108                 | 2,062              | 2                                      | 2,275   |
| <b>Top 5 importers</b>   | <b>8,039</b>                   | <b>42,472</b>         | <b>47,101</b>      | <b>(10)</b>                            | <b>34,113</b>                                 |
| <b>Total U.S. soybean export sales</b>                         | <b>11,226</b>                  | <b>58,456</b>         | <b>61,379</b>      | <b>(5)</b>                             | <b>50,758</b>                                 |
| % of projected exports   | 19%                            | 100%                  | 100%               |  |   |
| change from prior week <sup>2</sup>                            | 77                             | 144                   | 94                 |  |   |
| <b>Top 5 importers' share of U.S.<br/>soybean export sales</b> | 72%                            | 73%                   | 77%                |  | <b>67%</b>                                    |
| <b>USDA forecast, May 2022</b>                                 | <b>59,946</b>                  | <b>58,311</b>         | <b>61,608</b>      | <b>(5)</b>                             |   |

<sup>1</sup>Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; marketing year (MY) = Sep 1- Aug 31.

<sup>2</sup>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 previous week's outstanding sales and/or accumulated sales.

<sup>3</sup>FAS marketing year ranking reports (carry over 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 15

**Top 10 importers<sup>1</sup> of all U.S. wheat**

| For the week ending 5/05/2022                                 | Total Commitments <sup>2</sup> |                       |                    | % change<br>current MY<br>from last MY | Exports <sup>3</sup><br>3-yr. avg.<br>2018-20 |
|---|--------------------------------|-----------------------|--------------------|--|---|
|   | 2022/23<br>next MY             | 2021/22<br>current MY | 2020/21<br>last MY |  |   |
|   |                                |                       |                    |  | - 1,000 mt -                                  |
|   |                                |                       |                    |  | 1,000 mt -                                    |
| Mexico  | 418                            | 3,767                 | 3,642              | 3                                      | 3,388   |
| Philippines   | 532                            | 2,782                 | 3,207              | (13)                                   | 3,121   |
| Japan   | 186                            | 2,349                 | 2,492              | (6)                                    | 2,567   |
| Korea   | 90                             | 1,257                 | 1,914              | (34)                                   | 1,501   |
| Nigeria   | 164                            | 1,736                 | 1,404              | 24                                     | 1,490   |
| China   | 0                              | 848                   | 3,217              | (74)                                   | 1,268   |
| Taiwan  | 14                             | 951                   | 1,187              | (20)                                   | 1,187   |
| Indonesia   | 0                              | 122                   | 937                | (87)                                   | 1,131   |
| Thailand  | 55                             | 558                   | 810                | (31)                                   | 768   |
| Italy   | 20                             | 263                   | 616                | (57)                                   | 681   |
| <b>Top 10 importers</b>                                       | <b>1,478</b>                   | <b>14,633</b>         | <b>19,425</b>      | <b>(25)</b>                            | <b>17,102</b>                                 |
| <b>Total U.S. wheat export sales</b>                          | <b>2,432</b>                   | <b>19,430</b>         | <b>25,528</b>      | <b>(24)</b>                            | <b>24,617</b>                                 |
| % of projected exports  | 12%                            | 89%                   | 94%                |  |   |
| change from prior week <sup>2</sup>                           | 124                            | 14                    | 30                 |  |   |
| <b>Top 10 importers' share of U.S.<br/>wheat export sales</b> | 61%                            | 75%                   | 76%                |  | <b>69%</b>                                    |
| <b>USDA forecast, May 2022</b>                                | <b>21,117</b>                  | <b>21,935</b>         | <b>27,030</b>      | <b>(19)</b>                            |   |

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

<sup>2</sup>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.

<sup>3</sup>FAS marketing year final reports (carry over plus accumulated export); yr. = year; avg. = average.

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

Source: USDA, Foreign Agricultural Service.

Table 16

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

| Port regions                  | For the week ending<br>05/12/22 | Previous<br>week* | Current week<br>as % of previous | 2022 YTD*     | 2021 YTD*     | 2022 YTD as<br>% of 2021 YTD | Last 4-weeks as % of: |                  | 2021 total*    |
|-------------------------------|---------------------------------|-------------------|----------------------------------|---------------|---------------|------------------------------|-----------------------|------------------|----------------|
|                               |                                 |                   |                                  |               |               |                              | Last year             | Prior 3-yr. avg. |                |
| <b>Pacific Northwest</b>      |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 138                             | 54                | 254                              | 3,522         | 6,448         | 55                           | 27                    | 30               | 13,243         |
| Corn                          | 377                             | 436               | 87                               | 5,366         | 8,085         | 66                           | 67                    | 89               | 13,420         |
| Soybeans                      | 0                               | 144               | 0                                | 4,264         | 3,741         | 114                          | 950                   | 141              | 14,540         |
| <b>Total</b>                  | <b>515</b>                      | <b>634</b>        | <b>81</b>                        | <b>13,152</b> | <b>18,274</b> | <b>72</b>                    | <b>56</b>             | <b>67</b>        | <b>41,203</b>  |
| <b>Mississippi Gulf</b>       |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 35                              | 128               | 27                               | 1,519         | 915           | 166                          | 102                   | 79               | 3,202          |
| Corn                          | 506                             | 799               | 63                               | 16,291        | 19,687        | 83                           | 75                    | 107              | 38,498         |
| Soybeans                      | 576                             | 199               | 289                              | 9,859         | 9,691         | 102                          | 286                   | 152              | 27,159         |
| <b>Total</b>                  | <b>1,117</b>                    | <b>1,126</b>      | <b>99</b>                        | <b>27,669</b> | <b>30,293</b> | <b>91</b>                    | <b>98</b>             | <b>114</b>       | <b>68,858</b>  |
| <b>Texas Gulf</b>             |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 128                             | 56                | 229                              | 1,271         | 1,367         | 93                           | 130                   | 88               | 3,888          |
| Corn                          | 22                              | 0                 | n/a                              | 257           | 223           | 116                          | 90                    | 48               | 627            |
| Soybeans                      | 0                               | 0                 | n/a                              | 2             | 656           | 0                            | n/a                   | 0                | 1,611          |
| <b>Total</b>                  | <b>151</b>                      | <b>56</b>         | <b>269</b>                       | <b>1,531</b>  | <b>2,246</b>  | <b>68</b>                    | <b>124</b>            | <b>81</b>        | <b>6,126</b>   |
| <b>Interior</b>               |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 64                              | 39                | 166                              | 1,061         | 1,008         | 105                          | 80                    | 98               | 2,973          |
| Corn                          | 113                             | 207               | 55                               | 3,387         | 3,535         | 96                           | 89                    | 100              | 10,157         |
| Soybeans                      | 103                             | 107               | 96                               | 2,740         | 2,654         | 103                          | 109                   | 101              | 6,525          |
| <b>Total</b>                  | <b>280</b>                      | <b>352</b>        | <b>80</b>                        | <b>7,188</b>  | <b>7,196</b>  | <b>100</b>                   | <b>94</b>             | <b>100</b>       | <b>19,656</b>  |
| <b>Great Lakes</b>            |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 1                               | 0                 | n/a                              | 84            | 117           | 72                           | 57                    | 46               | 536            |
| Corn                          | 0                               | 0                 | n/a                              | 39            | 25            | 159                          | n/a                   | n/a              | 145            |
| Soybeans                      | 30                              | 13                | 240                              | 133           | 12            | n/a                          | 686                   | 857              | 592            |
| <b>Total</b>                  | <b>31</b>                       | <b>13</b>         | <b>246</b>                       | <b>256</b>    | <b>154</b>    | <b>167</b>                   | <b>147</b>            | <b>123</b>       | <b>1,273</b>   |
| <b>Atlantic</b>               |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 0                               | 0                 | n/a                              | 37            | 72            | 52                           | n/a                   | n/a              | 128            |
| Corn                          | 0                               | 10                | 0                                | 79            | 14            | 565                          | 244                   | 174              | 85             |
| Soybeans                      | 62                              | 68                | 91                               | 1,191         | 998           | 119                          | 553                   | 390              | 2,184          |
| <b>Total</b>                  | <b>62</b>                       | <b>78</b>         | <b>80</b>                        | <b>1,307</b>  | <b>1,084</b>  | <b>121</b>                   | <b>573</b>            | <b>407</b>       | <b>2,397</b>   |
| <b>U.S. total from ports*</b> |                                 |                   |                                  |               |               |                              |                       |                  |                |
| Wheat                         | 366                             | 277               | 132                              | 7,494         | 9,926         | 75                           | 55                    | 54               | 23,969         |
| Corn                          | 1,018                           | 1,451             | 70                               | 25,419        | 31,568        | 81                           | 75                    | 100              | 62,932         |
| Soybeans                      | 772                             | 531               | 145                              | 18,189        | 17,752        | 102                          | 238                   | 148              | 52,612         |
| <b>Total</b>                  | <b>2,156</b>                    | <b>2,259</b>      | <b>95</b>                        | <b>51,102</b> | <b>59,246</b> | <b>86</b>                    | <b>86</b>             | <b>97</b>        | <b>139,512</b> |

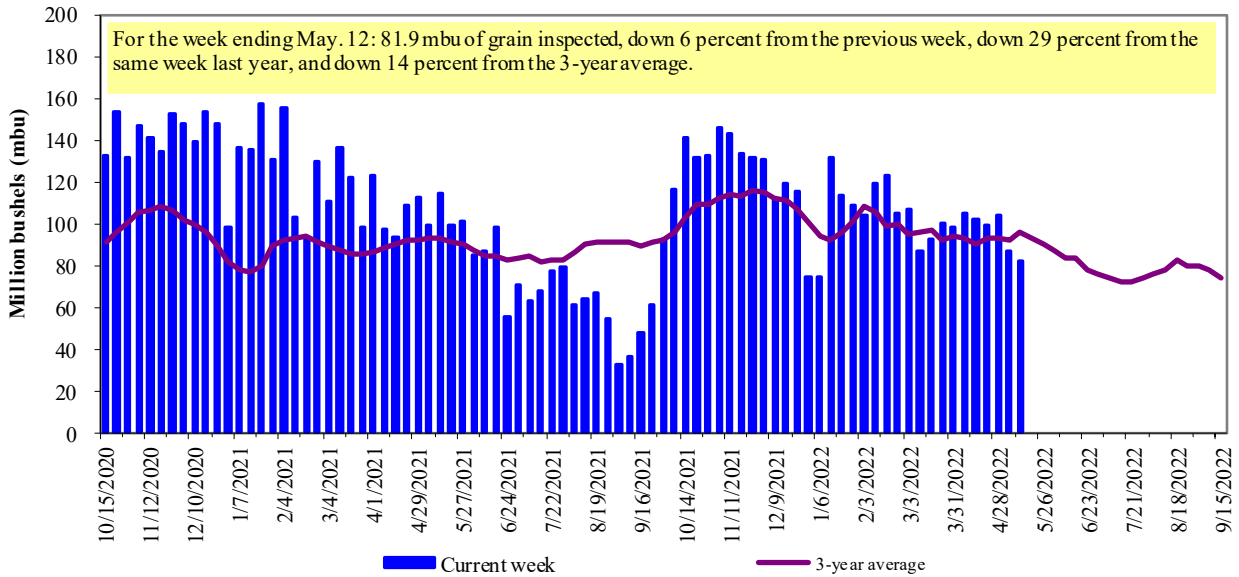
\*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 14

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

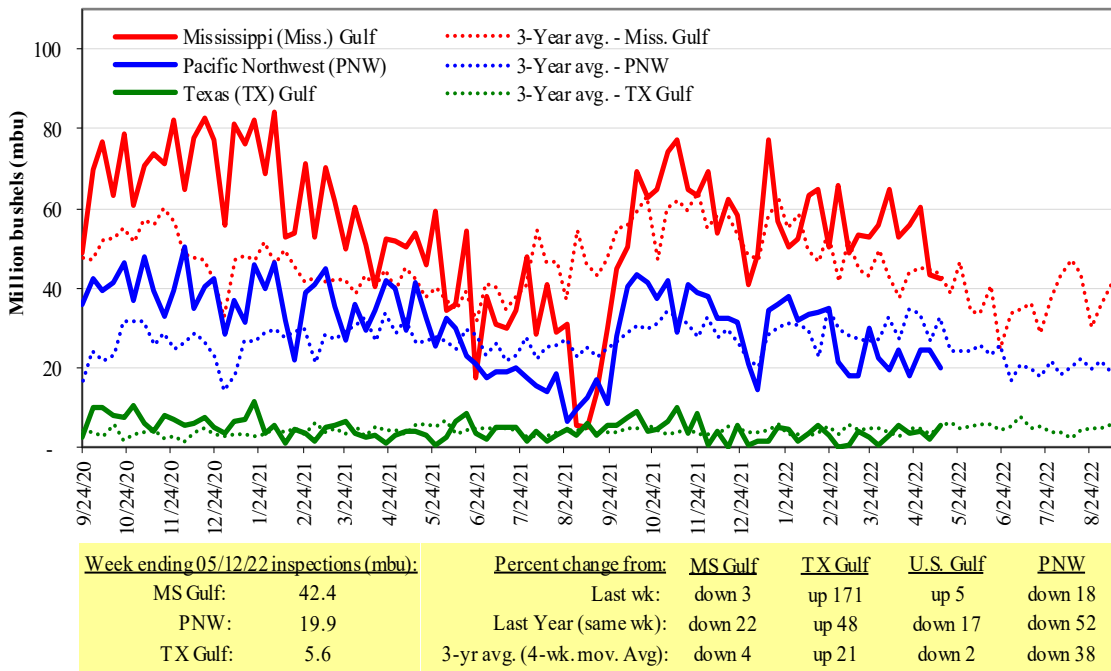


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

**U.S. Grain inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



Source: USDA, Federal Grain Inspection Service.

# Ocean Transportation

Table 17

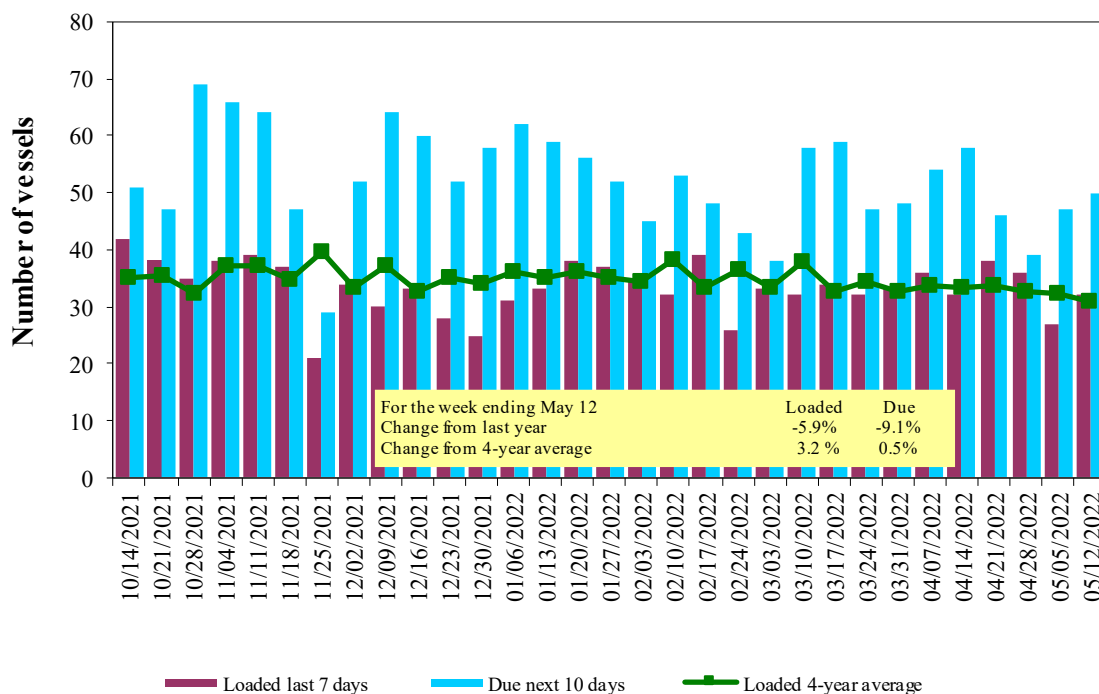
**Weekly port region grain ocean vessel activity (number of vessels)**

| Date         | In port   | Gulf          |                  | Pacific Northwest |
|--------------|-----------|---------------|------------------|-------------------|
|              |           | Loaded 7-days | Due next 10-days | In port           |
| 5/12/2022    | 19        | 32            | 50               | 7                 |
| 5/5/2022     | 20        | 27            | 47               | 11                |
| 2021 range   | (10...57) | (5...48)      | (15...69)        | (4...27)          |
| 2021 average | 34        | 32            | 49               | 15                |

Source: USDA, Agricultural Marketing Service.

Figure 16

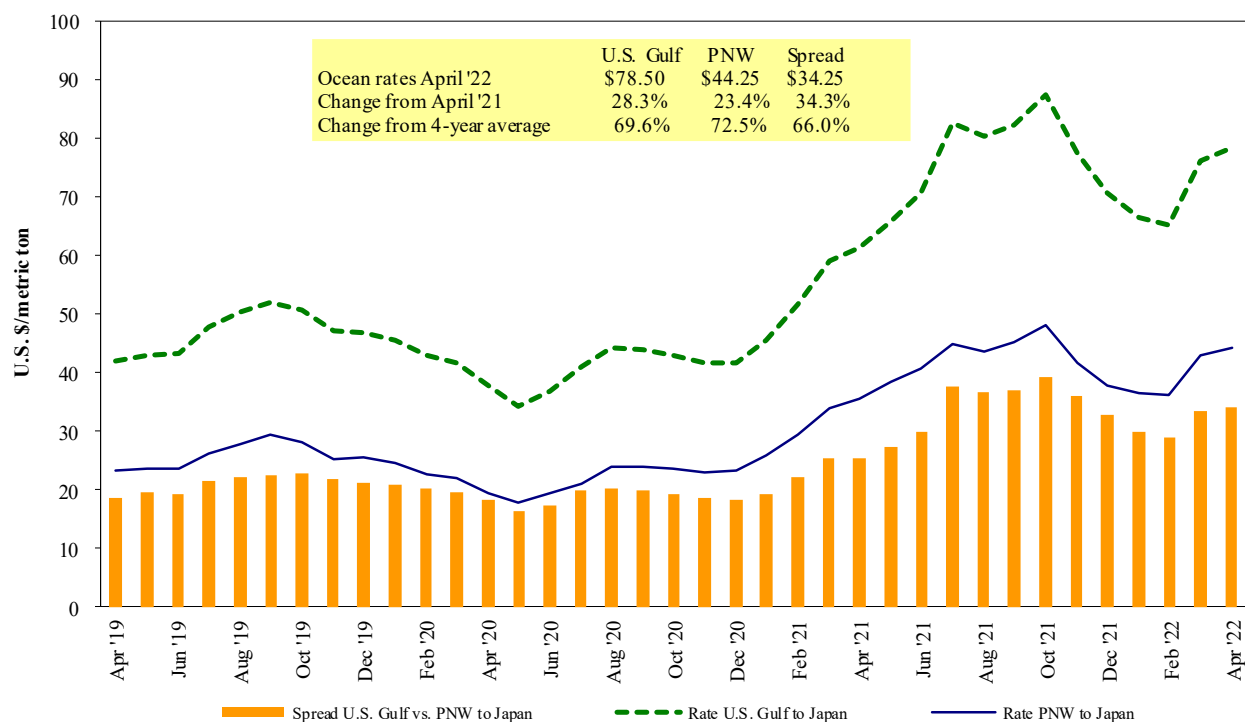
**U.S. Gulf<sup>1</sup> vessel loading activity**



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

Figure 17

## Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

## Ocean freight rates for selected shipments, week ending 05/14/2022

| Export region | Import region | Grain types  | Loading date       | Volume loads (metric tons) | Freight rate (US\$/metric ton) |
|---------------|---------------|--------------|--------------------|----------------------------|--------------------------------|
| U.S. Gulf     | Japan         | Heavy grain  | Jun 1/10           | 50,000                     | 89.65                          |
| U.S. Gulf     | Japan         | Heavy grain  | May 1/20, 2022     | 50,000                     | 78.90                          |
| U.S. Gulf     | China         | Heavy grain  | Dec 1/10, 2021     | 65,000                     | 76.00                          |
| U.S. Gulf     | China         | Heavy grain  | Nov 1/10, 2021     | 66,000                     | 89.00                          |
| U.S. Gulf     | Djibouti      | Sorghum      | Mar 1/10, 2022     | 10,000                     | 209.97*                        |
| U.S. Gulf     | Honduras      | Soybean Meal | Feb 18/28, 2022    | 7,820                      | 57.15*                         |
| U.S. Gulf     | S. Korea      | Heavy grain  | Jun 1/Jul, 2022    | 55,000                     | 82.75                          |
| U.S. Gulf     | Sudan         | Sorghum      | Mar 1/10, 2022     | 35,790                     | 149.97*                        |
| U.S. Gulf     | Sudan         | Sorghum      | Feb 1/10, 2022     | 35,780                     | 77.60*                         |
| PNW           | Japan         | Wheat        | Sep 1, 2021        | 52,170                     | 56.55*                         |
| PNW           | Yemen         | Wheat        | Jan 24/Feb 4, 2022 | 29,960                     | 124.00*                        |
| Brazil        | N. China      | Heavy grain  | Mar 18/27, 2022    | 64,000                     | 56.85                          |
| Brazil        | N. China      | Heavy grain  | Jan 1/5, 2022      | 64,000                     | 58.25                          |
| Argentina     | Taiwan        | Corn         | May 1/Jun, 2022    | 65,000                     | 85.00                          |
| Australia     | Japan         | Barley       | Nov 1/10, 2021     | 55,000                     | 65.50                          |

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

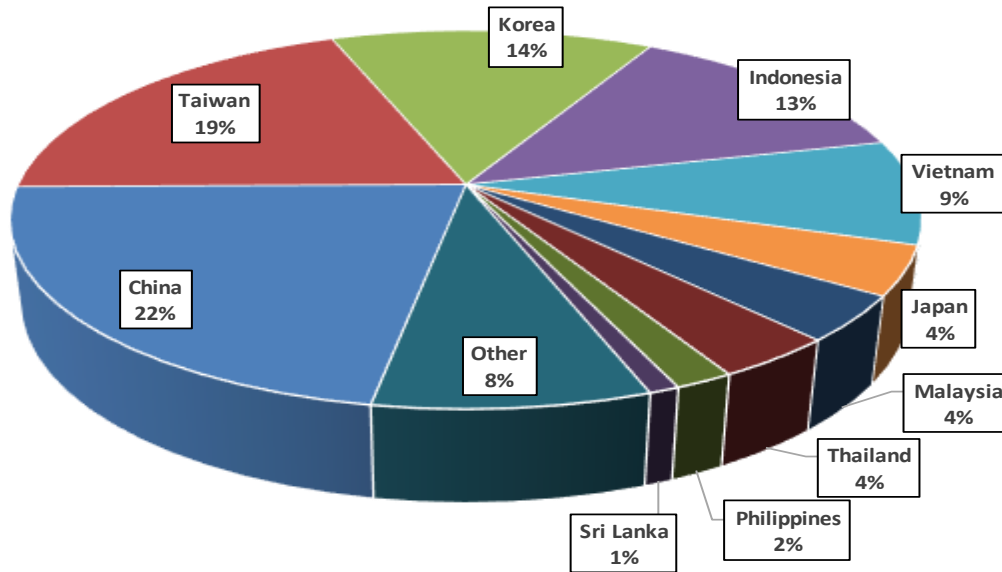
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

Source: Maritime Research, Inc.



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

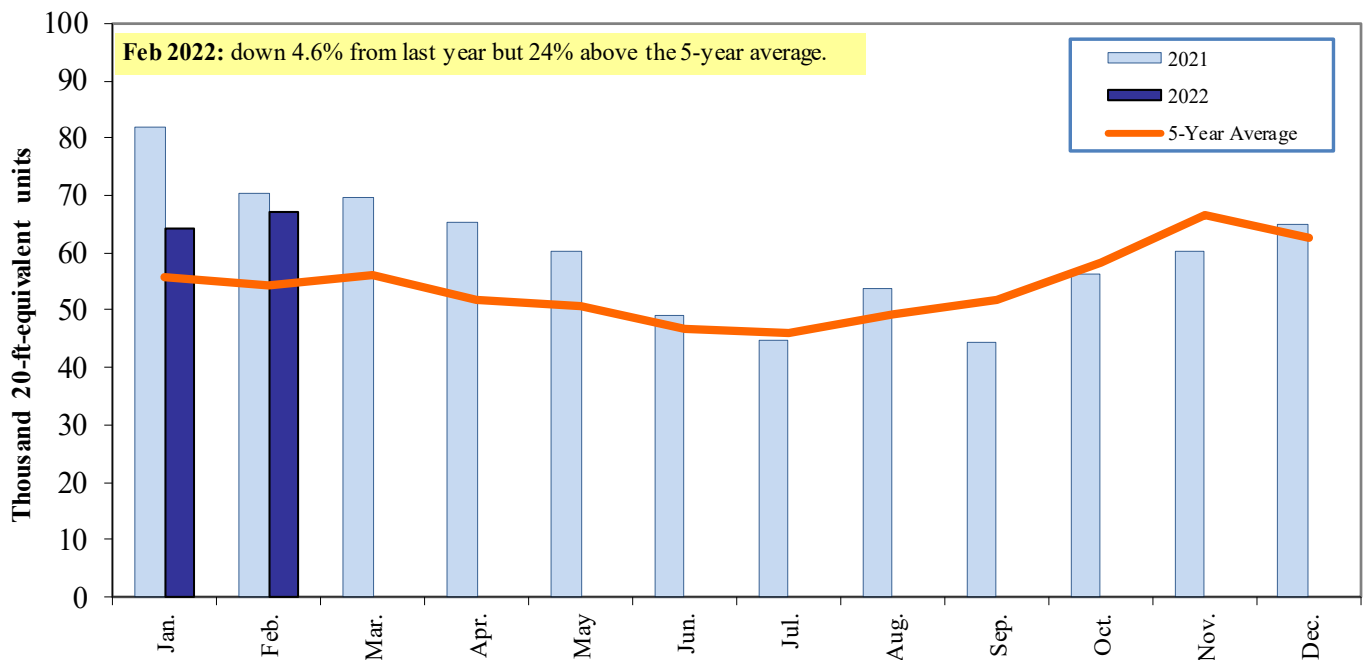
**Figure 18**  
**Top 10 destination markets for U.S. containerized grain exports, Jan-Feb 2022**



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

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

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



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

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

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