United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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July 7, 2022

Contents

The next release is July 14, 2022

WEEKLY HIGHLIGHTS

Old River Lock Closure Delayed Until August 30

On August 30, the U.S. Army Corps of Engineers (USACE) will close the Old River Lock, Lettsworth, LA, on the Mississippi River. Originally scheduled for August 15, the closure for necessary repairs will last an estimated 75 days (until November 12), down from the original 90 days. The agricultural industry had raised concerns that the timing of the closure, coinciding with harvest season, would negatively impact grain exports. Because trucking and other alternative logistics exceed the costs of river transportation, closing the lock for the entire harvest season would have been costly to farmers. The lock closure will directly impact two grain elevators, preventing them from shipping grain down the Mississippi River for the duration of the closure. To sync with the closure of the Old River Lock, USACE will also shift until August 30 its planned closure of the Lindy C. Boggs Lock, on the Red River, Marksville, LA. The Lindy C. Boggs Lock will close for a month, reopen for 2 weeks to clear the traffic backlog, and then close again for another month.

Several Midwest States Implement Fuel Tax Changes

Effective July 1, Indiana and Missouri raised fuel tax rates, while Illinois suspended all of its scheduled fuel-tax increases for 6 months, until January 1, 2023. In Indiana, the diesel rate rose 2 cents to 55 cents per gallon. Per a 2017 law, Indiana fuel tax rates are slated to increase through 2024 based on an indexed formula. Also, effective July 1, the Missouri diesel tax rate rose 2.5 cents per gallon, for a total tax of 22 cents per gallon. As required by a 2021 law, the Missouri tax is slated to gradually rise by 12.5 cents per gallon, for a total tax of 29.5 cents per gallon by July 2025. Earlier this year, Illinois suspended further increases to its fuel taxes, effectively freezing the diesel tax rate at 46.7-cents per gallon. Across the country, diesel prices have set record highs this year. In the Midwest, for the week ending June 13, diesel prices reached $5.631 per gallon, 239.8 cents above the same time last year.

Port of Houston Awards Contracts To Dredge Houston Ship Channel

On June 17, the Port of Houston awarded two contracts, worth $429.4 million, to dredge a 17.3-mile section of the Houston ship channel. The two firms performing the work are Weeks Marine (with a $329.6 million contract) and Curtin Maritime Corp (with a $99.8 million contract). The firms will widen one portion of the channel by 700 feet and another portion by 455 feet. The channel dredging is part of the Port of Houston's previously announced $1.1 billion expansion, to be completed by 2025. The expansion should allow the ship channel to accommodate 1,400 vessels per year and is expected to generate more than $134 billion annually. The Houston Ship Channel is currently the busiest waterway in the Nation. Its facilities have an economic impact of almost $802 billion and support more than 2.1 million jobs.

Snapshots by Sector

Export Sales

For the week ending June 23, **unshipped balances** of wheat, corn, and soybeans totaled 21.95 million metric tons (mmt), up 5 percent from the same time last year and down 7 percent from the previous week. Net **corn export sales** were 0.089 mmt, down 87 percent from the previous week. Net **soybean export sales** were −0.120 mmt, down significantly from the previous week. Net weekly **wheat export sales** for marketing year 2022/23 were 0.497 mmt, up 4 percent from last week.

Rail

U.S. Class I railroads originated 21,732 **grain carloads** during the week ending June 25. This was a 1-percent decrease from the previous week, 1 percent fewer than last year, and 2 percent more than the 3-year average.

Average July shuttle **secondary railcar** bids/offers (per car) were $58 below tariff for the week ending June 30. This was $51 more than last week and $250 more than this week last year.

Barge

For the week ending July 2, **barged grain movements** totaled 932,872 tons. This was 50.7 percent higher than the previous week and 20.9 percent higher than the same period last year.

For the week ending July 2, 595 grain barges **moved down river**—185 more barges than the previous week. There were 397 grain barges **unloaded** in the New Orleans region, 14 percent fewer than last week.

Ocean

For the week ending June 30, 21 **oceangoing grain vessels** were loaded in the Gulf—19 percent fewer than the same period last year. Within the next 10 days (starting July 1), 41 vessels were expected to be loaded—18 percent fewer than the same period last year.

As of June 30, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $76.50. This was 3 percent less than the previous week. The rate from the Pacific Northwest to Japan was $44.00 per mt, 2 percent less than the previous week.

Fuel

According to the U.S. Energy Information Administration's website, the agency will publish on-highway diesel fuel prices on Thursday, July 7, at 4:00 p.m.

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Feature Article/Calendar

Rail Service Shows Signs of Improvement, but Has Far To Go

Throughout 2022, agricultural shippers have dealt with significantly deteriorated rail service. To better understand the persistent service issues, the Surface Transportation Board (STB) held a 2-day hearing in April, with testimony from shipper groups describing costly ongoing problems. To begin to correct these issues, STB required the railroads to submit detailed service recovery plans (SRP) and start submitting new weekly service metrics in May. STB expected the SRPs to detail the specific actions that each carrier planned to take to improve service and the specific metrics by which it would evaluate its progress. STB required the Class I railroads to submit revised SRPs on June 23, because the original submissions "were perfunctory and lacked the level of detail that was mandated by the Board's order."[1] This article takes a look at the railroads' revised SRPs and some of STB's existing service data. Also examined is a newly collected metric to assess the current state of rail operations and the progress toward recovery.

Service Metrics Remain Poor but Show Some Signs of Improvement

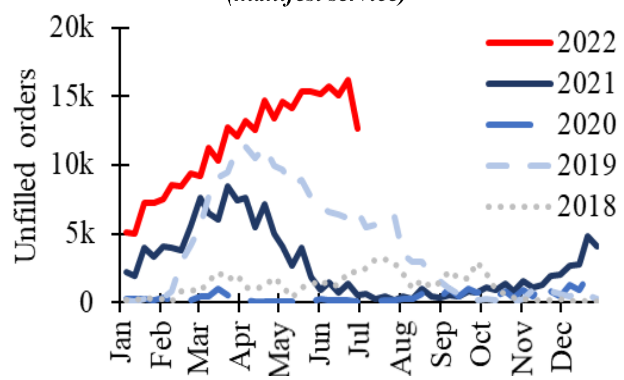
STB has collected service metrics data from the Class I railroads for several years. One of those performance metrics—the number of unfilled orders for empty grain cars in manifest service—highlights the extent of service problems for grain. As figure 1 shows, unfilled grain car orders in 2022 have well exceeded their levels of prior years. Starting in April, the weekly number of unfilled orders hit record levels. Until late June, the number continued to climb, repeatedly setting new records. However, after peaking for the week ending June 22, the number of unfilled orders improved in the next week, dropping by 3,500 cars, or 22 percent.

Bids for premium grain car service in the secondary auction markets provide another metric showing the service issues shippers face. Shippers can obtain cars from the railroads either on a first-come, first-served basis or by bidding for cars in the auction markets. Especially when rail service is poor, shippers turn to the auction markets to secure more certain car service. Figure 2 provides data on seasonal and historical secondary market bids for shuttle service. Near-month bids for grain car service have been high for most of this year. However, in recent weeks, those bids have fallen somewhat, possibly reflecting improved service.

Along with requesting SRPs, STB also required the railroads to begin submitting new weekly service metrics. Among these are dwell times at additional terminal locations, weekly recrew rates, some first-mile/last-mile metrics, and a trip-plan-compliance (TPC) metric. The TPC metric measures the weekly share of unit trains or cars that were placed within 24 hours of the original arrival estimate given by the railroad. The railroads also provided historical TPC data and projected TPC levels 6 months out—especially useful to gauge railroad recovery progress.[2] Figure 3 (p. 3) shows the historical TPC data and projected TPC levels for each of the four major U.S. Class I railroads.

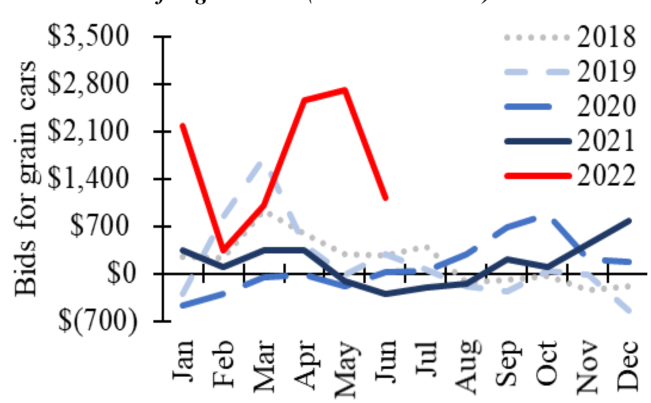
Figure 3 further illustrates the overall problems railroads have faced in the past few years. For all of the railroads, TPC has trended down since the start of the pandemic. TPC dropped significantly toward the end of last year, especially for BNSF Railway (BNSF) and Norfolk Southern Railway. This year, BNSF is the only railroad to have somewhat improved its TPC.[3] Both BNSF and Union Pacific Railroad must make considerable headway to meet their projected December service levels. According to CSX Transportation's projections, by December, the company's service will be at or above 90

Figure 1: Unfilled grain car orders (manifest service)



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

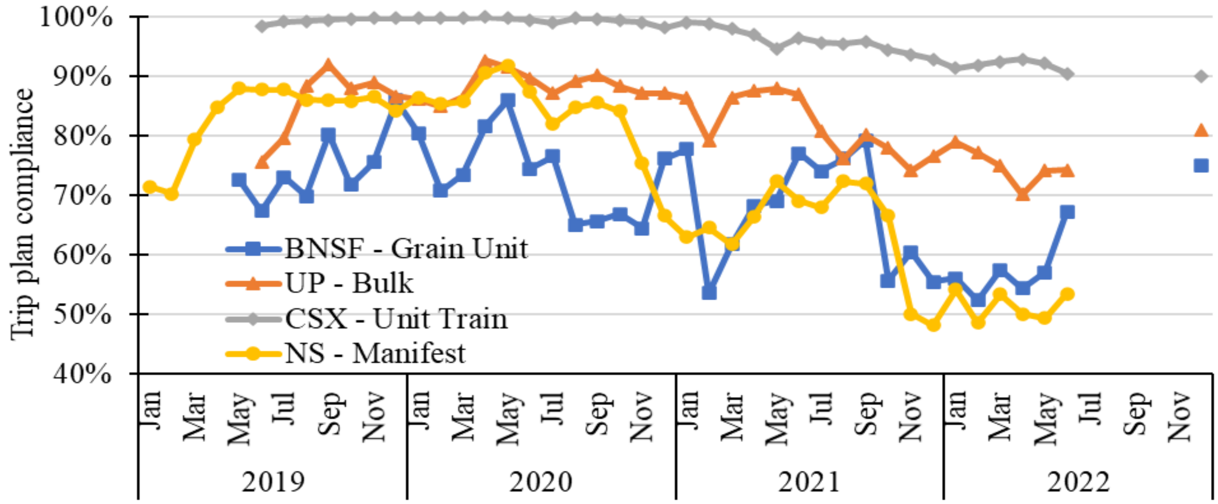
Figure 2: Secondary auction market bids for grain cars (near-month bids)



Source: USDA, Agricultural Marketing Service.

[1] All seven Class I railroads were required to submit new weekly service metrics, but only BNSF Railway, Union Pacific Railroad, Norfolk Southern Railway, and CSX Transportation were required to submit service recovery plans. The remainder of the article includes only data from these four Class I railroads.
[2] The weekly TPC metric should include a grain unit data point. However, not all railroads have been submitting that metric. Even the ones that have submitted it may not have submitted historical or projected grain unit data.
[3] BNSF's and Norfolk Southern's (NS) series both include data through June 24, because their historical and projected data align with the new weekly data they are also reporting to STB. Although, NS did not provide a manifest TPC projection. CSX's and UP's series include data only through June 10 and 17, respectively, because the historical and weekly data do not align cleanly. However, their latest weekly data do not show clear signs of progress.

Figure 3: Trip plan compliance history and projections for the four major U.S. Class I railroads



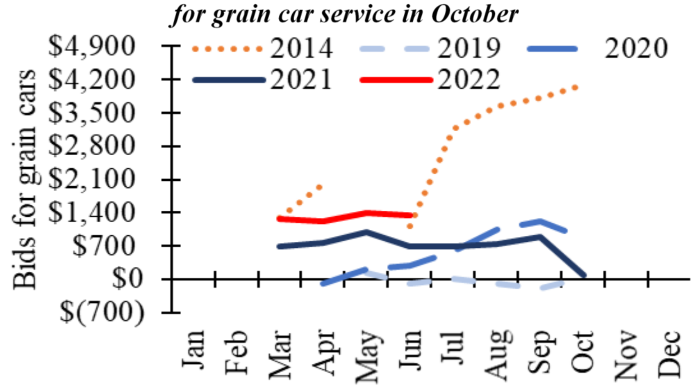
Note: BNSF = BNSF Railway; UP = Union Pacific Railroad; CSX = CSX Transportation; NS = Norfolk Southern Railway.
Source: USDA, Agricultural Marketing Service analysis of the Surface Transportation Board's rail service metrics.

percent where it currently stands. The projection suggests the company does not expect service to worsen through the rest of the year, but prospects for improvements remain unclear.

Analysis and Outlook

The modest progress shown by grain service metrics reflects some improvements specific to particular railroads and others specific to particular regions. The service improvements also reflect seasonal declines in demand for rail service from grain shippers. BNSF accounted for the majority of the recent drop in unfilled orders, which accords with the progress seen in BNSF's TPC. In its SRP, BNSF described varying service recovery across its network: some improvement has occurred along its Northern Corridor (spanning the Upper Midwest to the Pacific Northwest), but poor performance lingers on its Southern Transcon route (spanning from Chicago to California).[4] Unfilled grain car orders in North Dakota have indeed fallen more than BNSF's system total, suggesting some progress in the State. Still, the latest North Dakota numbers remain elevated compared to prior years.

Figure 4: Secondary auction market bids for grain car service in October



Source: USDA, Agricultural Marketing Service.

All the railroads named a labor shortage as the primary cause of the ongoing disruptions. All the SRPs described a hiring plan, but worker attrition and long training times for new hires will likely prolong the service issues. In their SRPs, multiple railroads described vacation buy-back plans to incentivize their employees to work through peak vacation time in the summer, but cautioned the week of July 4 would likely result in service delays.

Looking beyond the near term, the increased demand from the grain harvest could pose a problem for railroads. Grain shippers' typically low demand for rail service in summer may be a factor behind the decline in unfilled orders and auction market bids. Despite declining recent near-month auction market bids (fig. 2), bids for service in October have stayed high amid the expected high demand of harvest (fig. 4). Well above recent years, bids made in June 2022 for October service were on par with those made in the same period during the service crisis in 2014. Thus, although the service metrics reflect some recent improvements, recent bids suggest shippers are still concerned about the railroads' ability to handle the upcoming harvest.

Jesse.Gastelle@usda.gov, *PeterA.Caffarelli@usda.gov*, *Richard.Henderson2@usda.gov*

[4] In its SRP, BNSF detailed specific initiatives for improving service along its Southern Transcon route, such as targeting hiring and allocating 75 more locomotives to the region. In February, BNSF announced 2022 capital plans on the route (e.g., adding several segments of new double-track in eastern Kansas and starting a multi-year effort to add a new segment of triple-track in California), which could improve performance over a longer term.

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
07/06/22	n/a	324	234	224	342	312
06/29/22	n/a	322	232	236	353	319

[1]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	7/1/2022	6/24/2022
Corn	IL–Gulf	-1.36	-0.97
Corn	NE–Gulf	-1.32	-0.90
Soybean	IA–Gulf	-2.14	-1.94
HRW	KS–Gulf	-2.29	-2.35
HRS	ND–Portland	-2.09	-1.88

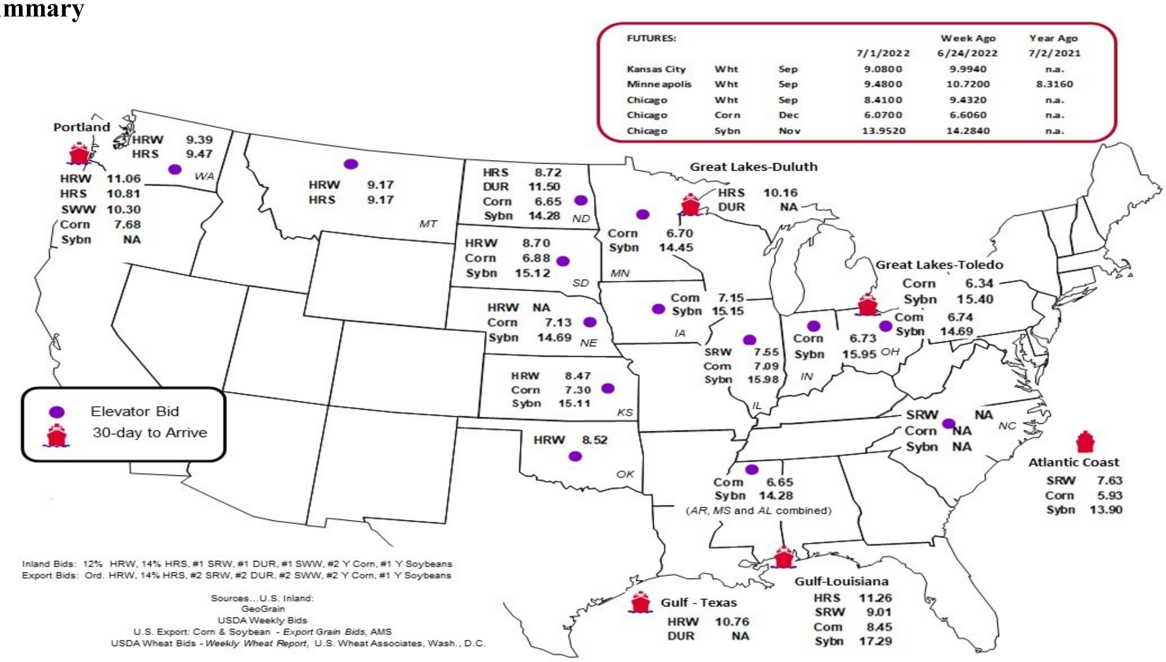
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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)[1]

For the week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-border Mexico[3]
6/30/2022[p]	816	326	4,482	378	6,002	6/25/2022	2,890
6/22/2022[r]	739	256	5,241	288	6,524	6/18/2022	2,508
2022 YTD[r]	36,342	23,656	148,132	14,070	222,200	2022 YTD	70,265
2021 YTD[r]	34,617	38,098	161,064	9,887	243,666	2021 YTD	69,613
2022 YTD as % of 2021 YTD	105	62	92	142	91	% change YTD	101
Last 4 weeks as % of 2021[2]	138	48	99	-	100	Last 4wks. % 2021	83
Last 4 weeks as % of 4-year avg.[2]	124	56	94	184	95	Last 4wks. % 4 yr.	99
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

[1]Data is incomplete as it is voluntarily provided.

[2] Compared with same 4-weeks in 2021 and prior 4-year average.

[3] 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.

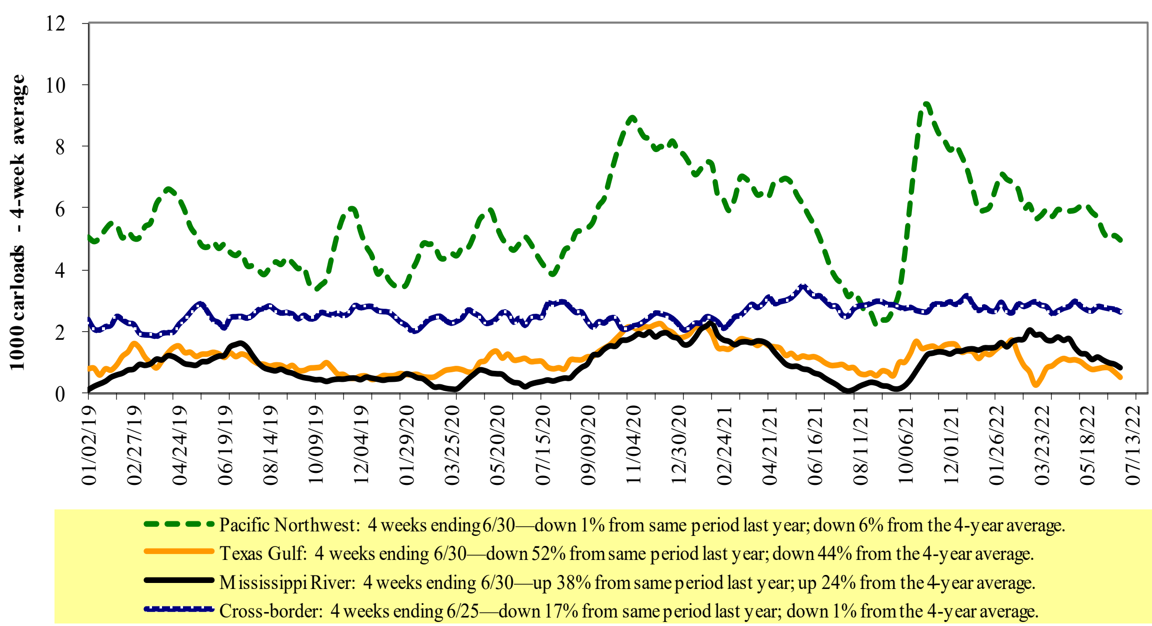
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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



Source: USDA, Agricultural Marketing Service.

Table 4

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

For the week ending:	East		West			U.S. total	Canada	
6/25/2022	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,584	2,667	10,216	1,261	6,004	21,732	3,340	2,972
This week last year	1,646	2,444	10,554	1,538	5,810	21,992	3,603	5,248
2022 YTD	45,846	59,814	287,280	31,234	144,565	568,739	86,322	89,081
2021 YTD	48,693	64,998	318,068	28,075	162,273	622,107	115,479	133,868
2022 YTD as % of 2021 YTD	94	92	90	111	89	91	75	67
Last 4 weeks as % of 2021*	106	100	105	97	98	102	88	58
Last 4 weeks as % of 3-yr. avg.**	111	96	102	113	107	104	79	59
Total 2021	93,935	120,909	609,890	64,818	318,002	1,207,554	210,113	242,533

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

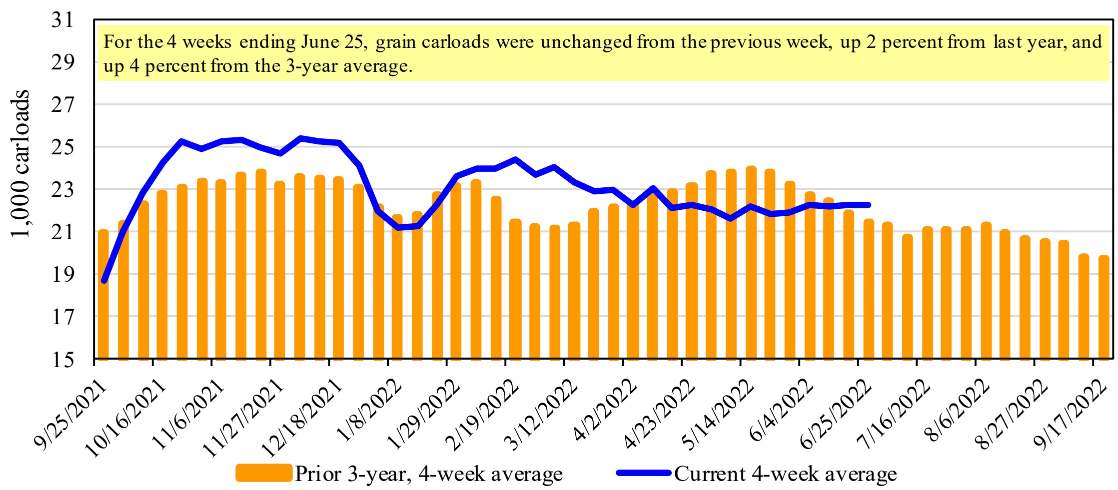
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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[1] ($/car)[2]

For the week ending: 6/30/2022		Jul-22	Jul-21	Aug-22	Aug-21	Sep-22	Sep-21	Oct-22	Oct-21
BNSF[3]	COT grain units	0	183	0	0	no offer	no bids	no offer	no bids
	COT grain single-car	0	11	0	0	no offer	0	no offer	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

Delivery period: Jul-22 through Oct-21.

[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.

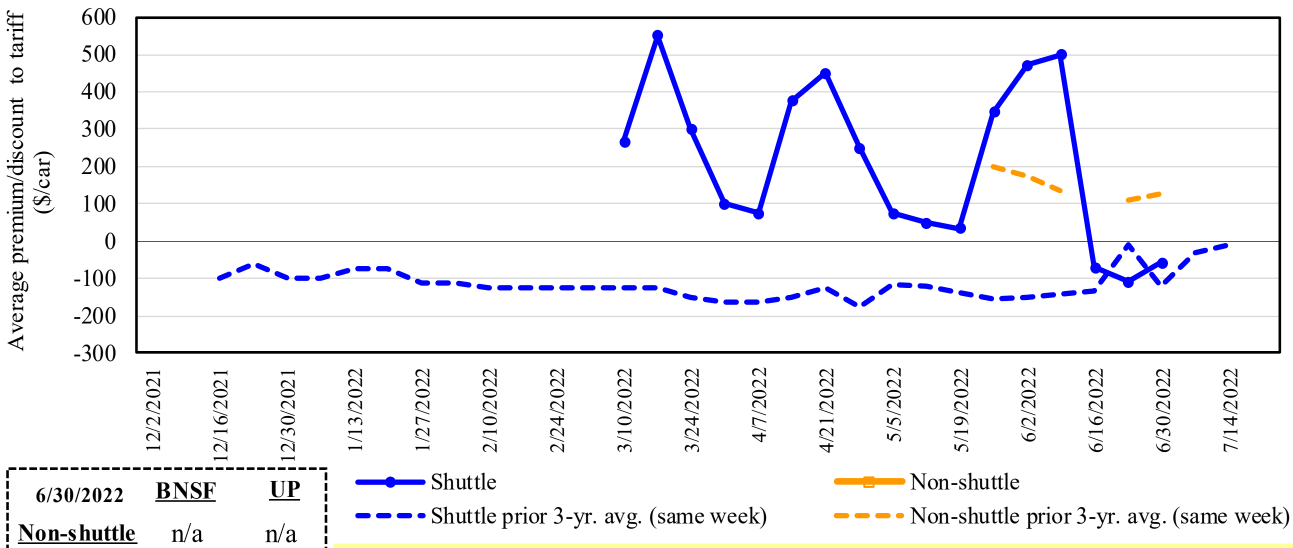
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 4
Secondary market bids/offers for railcars to be delivered in July 2022

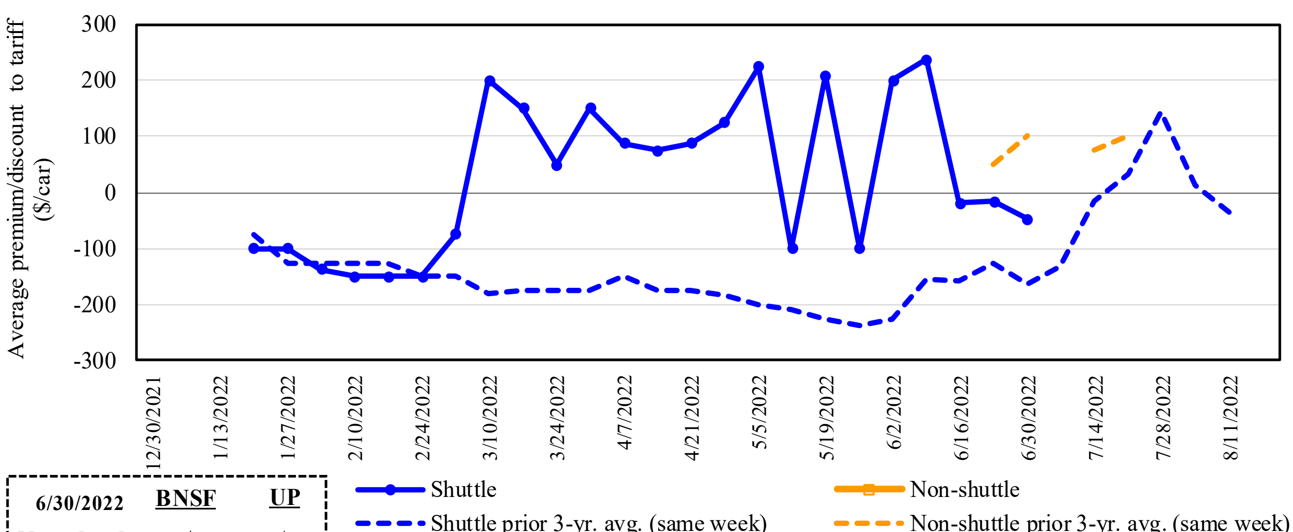


6/30/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$248	$133

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $51 this week and are $608 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.

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



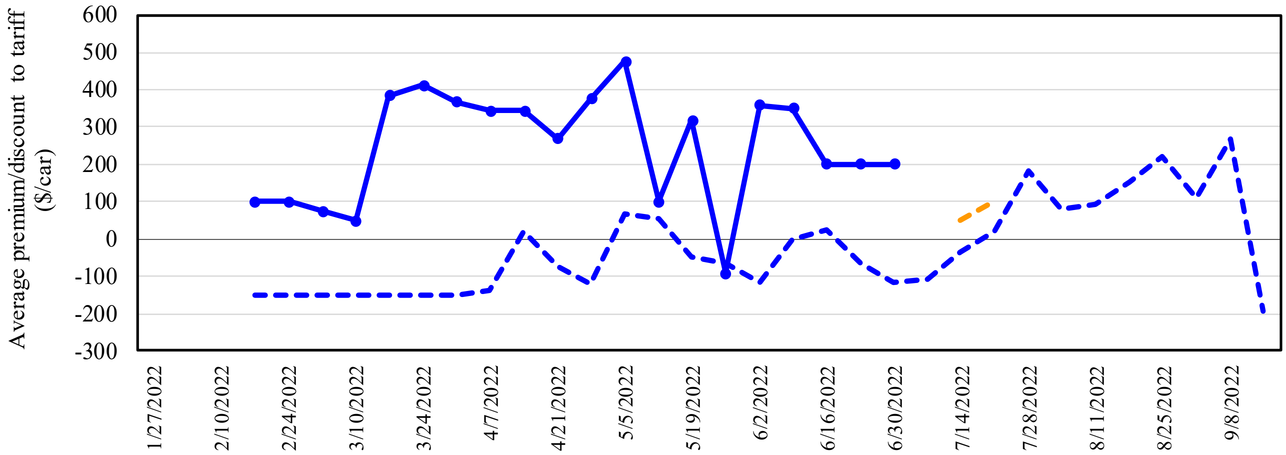
6/30/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$244	$150

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $31 this week and are $284 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.

Figure 6

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



6/30/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$100	$500

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers are unchanged this week and are $275 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)[1]

	For the week ending: 6/30/2022	Delivery period					
		Jul-22	**Aug-22**	**Sep-22**	**Oct-22**	**Nov-22**	**Dec-22**
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 2021	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 2021	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(248)**	**(244)**	**(100)**	**1,225**	**1,000**	**775**
	Change from last week	69	(13)	0	1,325	(200)	25
	Change from same week 2021	17	119	167	483	n/a	n/a
	UP-Pool	**133**	**150**	**500**	**1,200**	**750**	**n/a**
	Change from last week	33	(50)	0	700	n/a	n/a
	Change from same week 2021	483	400	700	533	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 7

Tariff rail rates for unit and shuttle train shipments[1]

July 2022	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,695	$354	$40.21	$1.09	6
	Grand Forks, ND	Duluth-Superior, MN	$3,658	$0	$36.33	$0.99	-13
	Wichita, KS	Los Angeles, CA	$7,490	$0	$74.38	$2.02	5
	Wichita, KS	New Orleans, LA	$4,600	$623	$51.87	$1.41	10
	Sioux Falls, SD	Galveston-Houston, TX	$7,226	$0	$71.76	$1.95	5
	Colby, KS	Galveston-Houston, TX	$4,850	$683	$54.94	$1.50	10
	Amarillo, TX	Los Angeles, CA	$5,121	$950	$60.29	$1.64	12
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$704	$46.71	$1.19	14
	Toledo, OH	Raleigh, NC	$8,130	$774	$88.42	$2.25	14
	Des Moines, IA	Davenport, IA	$2,505	$149	$26.36	$0.67	6
	Indianapolis, IN	Atlanta, GA	$6,227	$581	$67.61	$1.72	14
	Indianapolis, IN	Knoxville, TN	$5,247	$376	$55.84	$1.42	12
	Des Moines, IA	Little Rock, AR	$4,000	$438	$44.07	$1.12	10
	Des Moines, IA	Los Angeles, CA	$5,880	$1,276	$71.06	$1.81	15
Soybeans	Minneapolis, MN	New Orleans, LA	$4,431	$1,102	$54.95	$1.50	43
	Toledo, OH	Huntsville, AL	$6,714	$552	$72.15	$1.96	10
	Indianapolis, IN	Raleigh, NC	$7,422	$785	$81.50	$2.22	15
	Indianapolis, IN	Huntsville, AL	$5,367	$373	$57.00	$1.55	9
	Champaign-Urbana, IL	New Orleans, LA	$4,665	$704	$53.32	$1.45	10
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,193	$0	$41.64	$1.13	4
	Wichita, KS	Galveston-Houston, TX	$4,611	$0	$45.79	$1.25	9
	Chicago, IL	Albany, NY	$6,670	$731	$73.49	$2.00	16
	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	$1,119	$69.93	$1.90	10
Corn	Minneapolis, MN	Portland, OR	$5,380	$0	$53.43	$1.36	4
	Sioux Falls, SD	Tacoma, WA	$5,340	$0	$53.03	$1.35	4
	Champaign-Urbana, IL	New Orleans, LA	$3,920	$704	$45.92	$1.17	14
	Lincoln, NE	Galveston-Houston, TX	$4,080	$0	$40.52	$1.03	5
	Des Moines, IA	Amarillo, TX	$4,420	$551	$49.36	$1.25	10
	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	$812	$56.67	$1.54	11
	Toledo, OH	Huntsville, AL	$4,954	$552	$54.67	$1.49	11
	Grand Island, NE	Portland, OR	$5,280	$1,146	$63.81	$1.74	14

[1] 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.

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

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

[4] 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

Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	Tariff rate plus fuel surcharge per: metric ton[3]	Tariff rate plus fuel surcharge per: bushel[3]	Percent change[4] Y/Y
Date: December 2021							
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	Torreon, 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	Torreon, 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	Torreon, CU	$7,225	$438	$78.29	$1.99	6

[1]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.

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

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

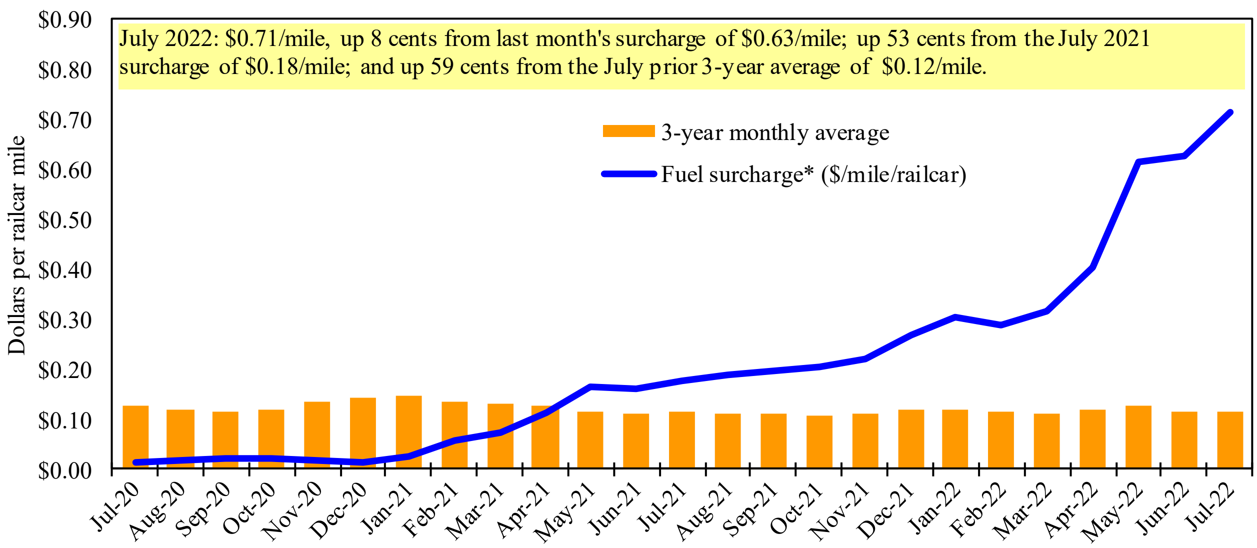
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[5] 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[1]

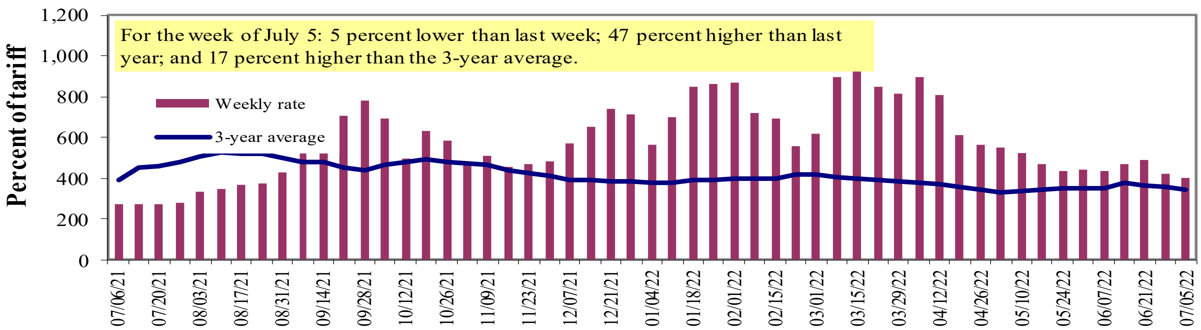


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: 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[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]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
Rate[1]	7/5/2022	530	437	404	324	441	441	335
	6/28/2022	577	484	424	354	481	481	364
$/ton	7/5/2022	32.81	23.25	18.75	12.93	20.68	17.82	10.52
	6/28/2022	35.72	25.75	19.67	14.12	22.56	19.43	11.43
Current week % change from the same week:								
	Last year	48	59	47	63	106	106	80
	3-year avg. [2]	29	24	17	40	94	94	54
Rate[1]	August	650	606	594	536	603	603	553
	October	884	859	853	811	869	869	797

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]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

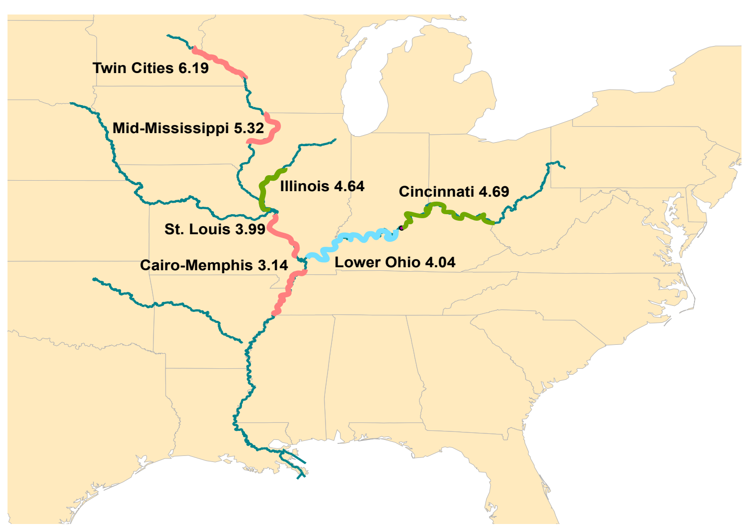
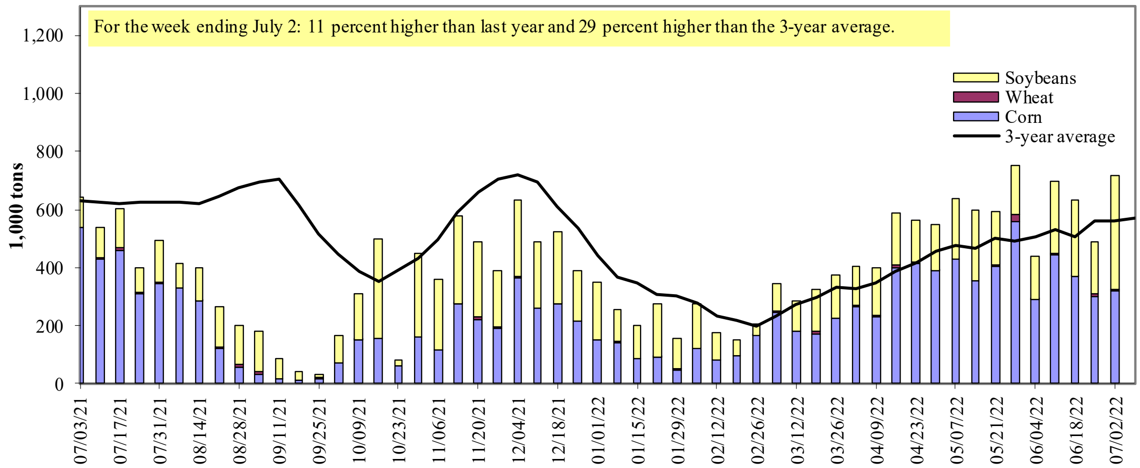


Figure 10

Barge movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



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

Source: U.S. Army Corps of Engineers.

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.

Table 10

Barge grain movements (1,000 tons)

For the week ending 07/02/2022	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	210	0	162	0	372
Winfield, MO (L25)	279	2	274	3	558
Alton, IL (L26)	311	2	359	3	674
Granite City, IL (L27)	319	5	393	3	720
Illinois River (La Grange)	81	0	71	0	152
Ohio River (Olmsted)	85	14	38	0	137
Arkansas River (L1)	0	48	28	0	76
Weekly total - 2022	404	67	459	3	933
Weekly total - 2021	596	51	124	0	771
2022 YTD[1]	10,719	879	6,444	145	18,188
2021 YTD[1]	16,055	709	4,513	191	21,468
2022 as % of 2021 YTD	67	124	143	76	85
Last 4 weeks as % of 2021[2]	71	114	240	91	100
Total 2021	23,516	1,634	11,325	297	36,772

[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.

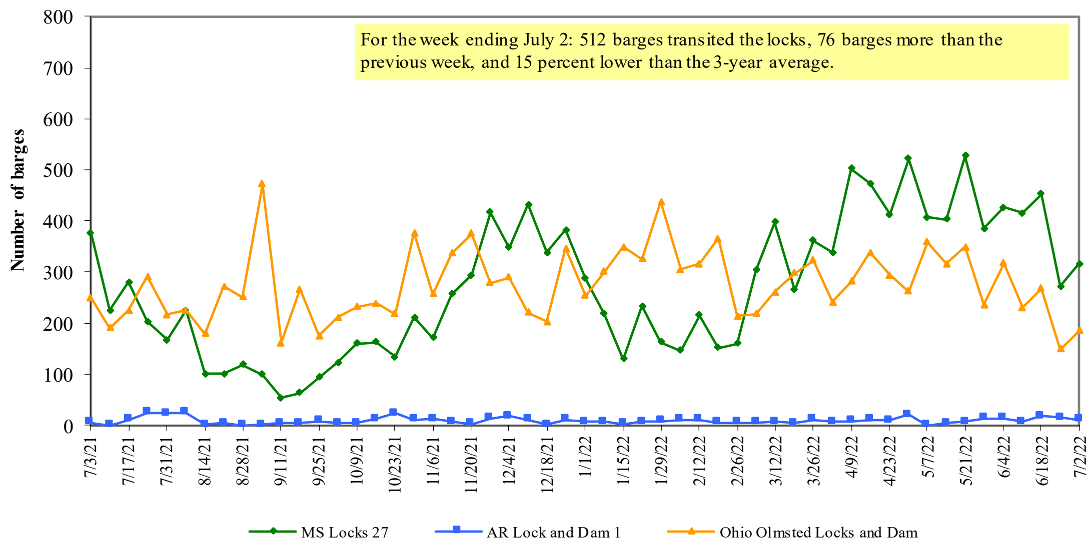
[2] As a percent of same period in 2021.

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 11

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

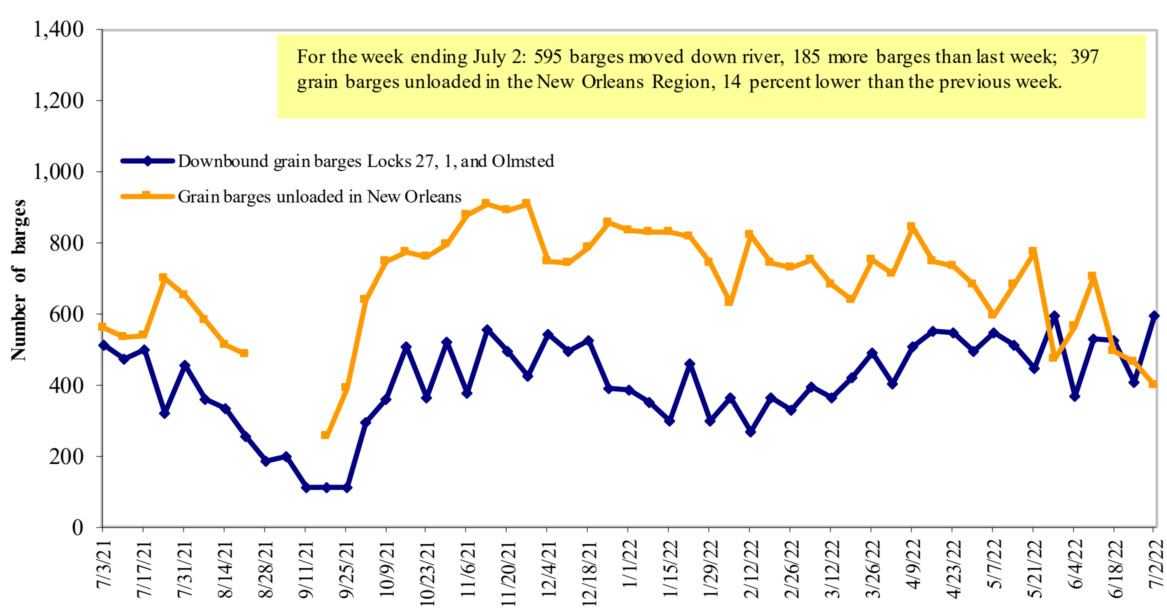


Source: U.S. Army Corps of Engineers.

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.

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.

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.

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 7/4/2022 (U.S. $/gallon)

			Change from	
Region	**Location**	**Price**	**Week ago**	**Year ago**
I	East Coast	NA	#N/A	#N/A
	New England	NA	#N/A	#N/A
	Central Atlantic	NA	#N/A	#N/A
	Lower Atlantic	NA	#N/A	#N/A
II	Midwest	NA	#N/A	#N/A
III	Gulf Coast	NA	#N/A	#N/A
IV	Rocky Mountain	NA	#N/A	#N/A
V	West Coast	NA	#N/A	#N/A
	West Coast less California	NA	#N/A	#N/A
	California	NA	#N/A	#N/A
Total	United States	NA	#N/A	#N/A

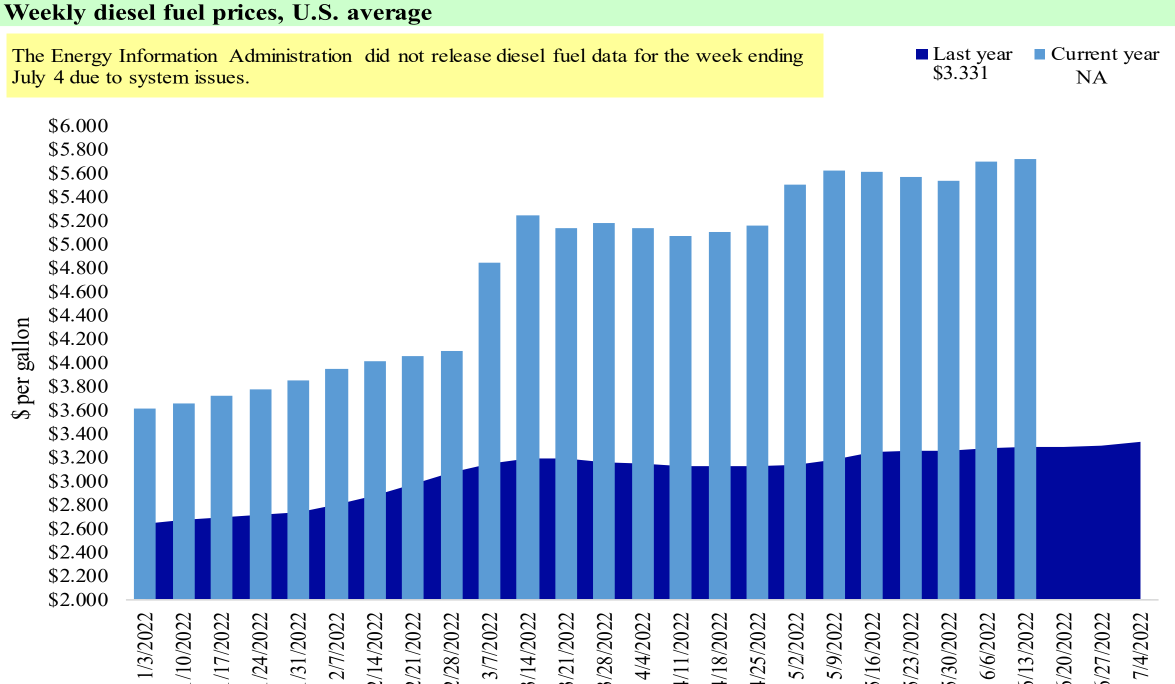
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices, so the week-to-week and year-to-year changes may not be comparable.

Figure 13

Weekly diesel fuel prices, U.S. average



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

Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices, so the week-to-week and year-to-year changes may not be comparable.

NA= Not Available

Grain Exports

Table 12

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

For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
	Wheat								
Export balances[1]									
6/23/2022	1,343	996	1,268	899	104	4,610	8,953	8,389	21,953
This week year ago	1,549	1,040	1,563	1,078	8	5,238	12,148	3,568	20,954
Cumulative exports-marketing year[2]									
2021/22 YTD	340	151	403	248	18	1,160	51,471	51,729	104,360
2020/21 YTD	519	32	353	231	26	1,162	57,400	58,273	116,834
YTD 2021/22 as % of 2020/21	65	0	114	107	0	100	90	89	89
Last 4 wks. as % of same period 2020/21*	79	90	83	79	915	84	85	258	114
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

[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 13

Top 5 importers[1] of U.S. corn

For the week ending 06/23/2022	Total commitments[2] 2022/23 next MY	2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -			
Mexico	2075.4	16,468	14,880	11	14,817
Japan	597.3	9,700	10,584	(8)	11,082
China	2720	14,659	23,332	(37)	7,920
Columbia	100	4,345	3,846	13	4,491
Korea	0	1,473	3,526	0	3,302
Top 5 importers	**5,493**	**46,643**	**56,169**	**(17)**	**41,613**
Total U.S. corn export sales	**6,377**	**60,424**	**69,547**	**(13)**	**53,145**
% of projected exports	10%	97%	99%		
Change from prior week[2]	**119**	**89**	**15**		
Top 5 importers' share of U.S. corn export sales	86%	77%	81%		78%
USDA forecast June 2022	**61,069**	**62,341**	**70,051**	**(11)**	
Corn use for ethanol USDA forecast, June 2022	**136,525**	**136,525**	**127,838**	**7**	

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

[2]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.

[3]FAS 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 5 importers[1] of U.S. soybeans

For the week ending 6/23/2022	Total commitments[2] 2022/23 next MY	2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
					- 1,000 mt -
China	7,765	30,550	35,809	(15)	21,666
Mexico	700	5,325	4,747	12	4,754
Egypt	228	4,093	2,777	47	3,093
Indonesia	7	1,651	2,256	(27)	2,325
Japan	130	2,418	2,276	6	2,275
Top 5 importers	**8,830**	**44,036**	**47,864**	**(8)**	**34,113**
Total U.S. soybean export sales	**13,498**	**60,119**	**61,841**	**(3)**	**50,758**
% of projected exports	23%	102%	100%		
change from prior week[2]	**128**	**(120)**	**93**		
Top 5 importers' share of U.S. soybean export sales	65%	73%	77%		**67%**
USDA forecast, June 2022	**59,946**	**59,128**	**61,608**	**(4)**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; marketing year (MY) = Sep 1 - Aug 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 previous week's outstanding sales and/or accumulated sales.

[3]FAS 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 15

Top 10 importers[1] of all U.S. wheat

For the week ending 6/23/2022	Total Commitments[2] 2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
		1,000 mt -		- 1,000 mt -
Mexico	1,080	1,032	5	3,388
Philippines	901	881	2	3,121
Japan	575	753	(24)	2,567
Korea	373	366	2	1,501
Nigeria	308	537	(43)	1,490
China	0	270	(100)	1,268
Taiwan	127	184	(31)	1,187
Indonesia	11	62	(82)	1,131
Thailand	125	121	4	768
Italy	102	39	163	681
Top 10 importers	**3,601**	**4,243**	(15)	**17,102**
Total U.S. wheat export sales	**5,770**	**6,400**	(10)	**24,617**
% of projected exports	27%	29%		
change from prior week[2]	**497**	**226**		
Top 10 importers' share of U.S. wheat export sales	62%	66%		69%
USDA forecast, June 2022	**21,117**	**21,935**	(4)	

[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 16

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

Port regions	For the week ending 06/30/22	Previous week*	Current week as % of previous	2022 YTD*	2021 YTD*	2022 YTD as % of 2021 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2021 total*
Pacific Northwest									
Wheat	0	133	0	4,479	8,164	55	56	45	13,243
Corn	1	437	0	7,642	11,079	69	63	88	13,420
Soybeans	0	0	n/a	4,422	3,758	118	n/a	31	14,540
Total	**1**	**570**	**0**	**16,543**	**23,001**	**72**	**64**	**64**	**41,203**
Mississippi Gulf									
Wheat	45	97	46	2,067	1,313	157	151	129	3,202
Corn	432	573	75	21,135	25,947	81	73	105	38,498
Soybeans	191	365	52	11,740	10,347	113	367	124	27,159
Total	**668**	**1,036**	**64**	**34,942**	**37,607**	**93**	**104**	**112**	**68,858**
Texas Gulf									
Wheat	0	67	0	1,662	2,030	82	46	45	3,888
Corn	0	0	n/a	378	271	140	99	80	627
Soybeans	0	0	n/a	2	656	0	n/a	n/a	1,611
Total	**0**	**67**	**0**	**2,042**	**2,957**	**69**	**49**	**47**	**6,126**
Interior									
Wheat	73	74	100	1,453	1,443	101	121	140	2,973
Corn	225	194	116	4,813	4,988	96	103	110	10,157
Soybeans	107	96	112	3,632	3,325	109	123	94	6,525
Total	**405**	**363**	**111**	**9,897**	**9,756**	**101**	**111**	**109**	**19,656**
Great Lakes									
Wheat	0	0	n/a	111	229	49	2	1	536
Corn	0	0	n/a	100	39	257	238	713	145
Soybeans	13	13	101	221	26	861	200	47	592
Total	**13**	**13**	**101**	**432**	**293**	**147**	**71**	**33**	**1,273**
Atlantic									
Wheat	0	0	n/a	37	76	49	5	14	128
Corn	8	21	37	177	14	n/a	n/a	n/a	85
Soybeans	63	27	230	1,521	1,054	144	668	430	2,184
Total	**70**	**48**	**146**	**1,735**	**1,144**	**152**	**796**	**532**	**2,397**
U.S. total from ports*									
Wheat	118	371	32	9,809	13,255	74	71	62	23,969
Corn	665	1,225	54	34,245	42,337	81	76	103	62,932
Soybeans	374	501	75	21,537	19,166	112	268	107	52,612
Total	**1,156**	**2,097**	**55**	**65,592**	**74,758**	**88**	**92**	**93**	**139,512**

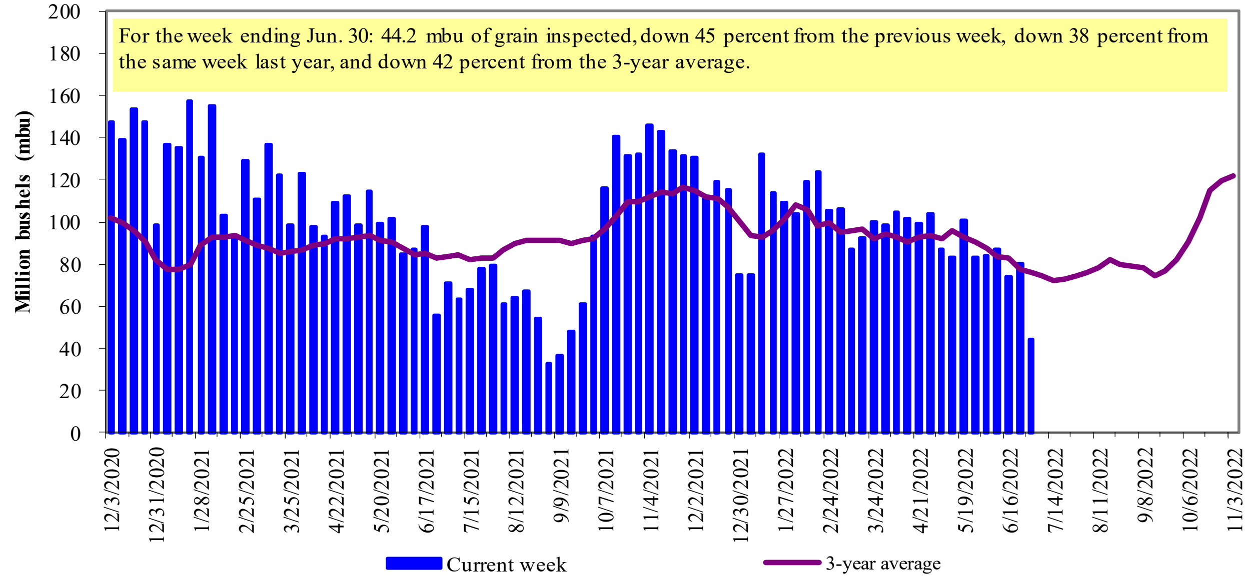
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

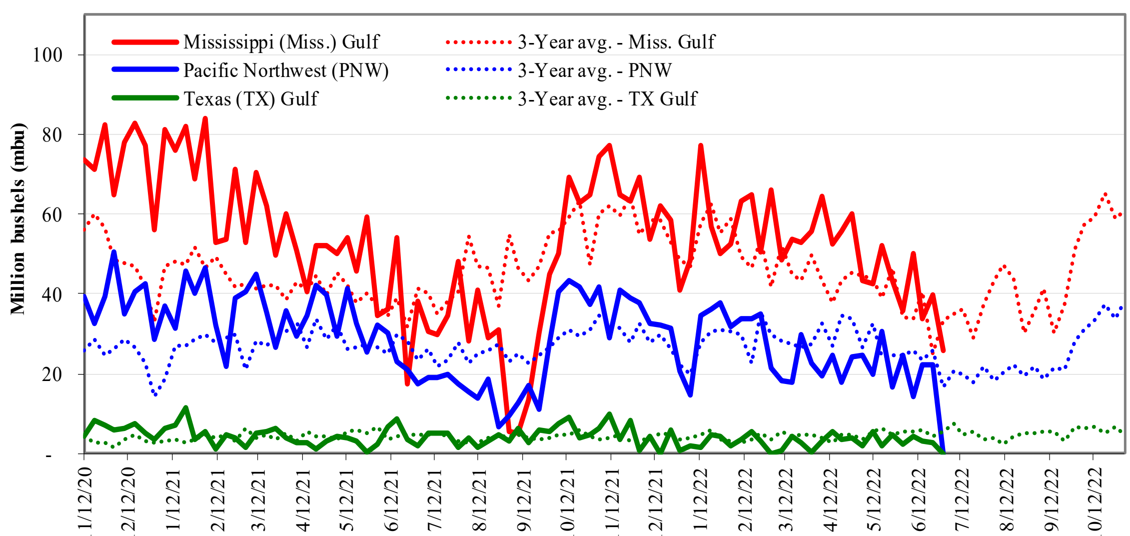


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Week ending 06/30/22 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	25.7	Last wk:	down 35	down 100	down 39	down 100
PNW:	0.0	Last Year (same wk):	down 32	down 100	down 36	down 100
TX Gulf:	0.0	3-yr avg. (4-wk. mov. Avg):	down 23	down 100	down 33	down 100

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

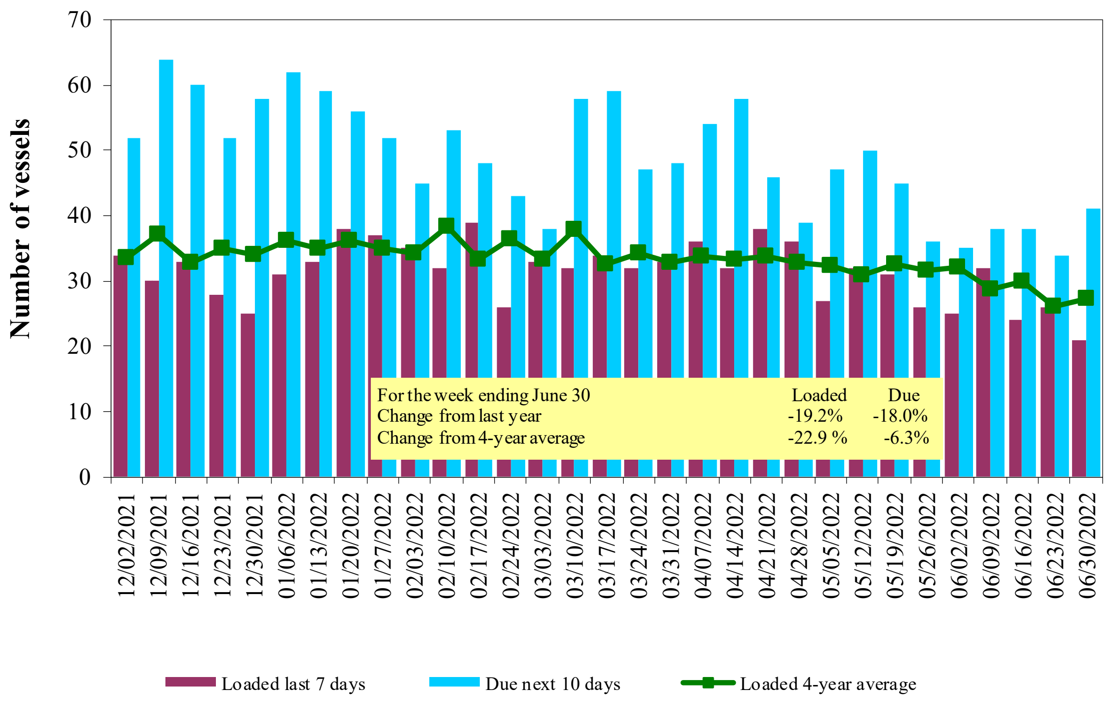
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
6/30/2022	15	21	41	5
6/23/2022	16	26	34	6
2021 range	(10…57)	(5...48)	(15...69)	(4…27)
2021 average	34	32	49	15

Source: USDA, Agricultural Marketing Service.

Figure 16

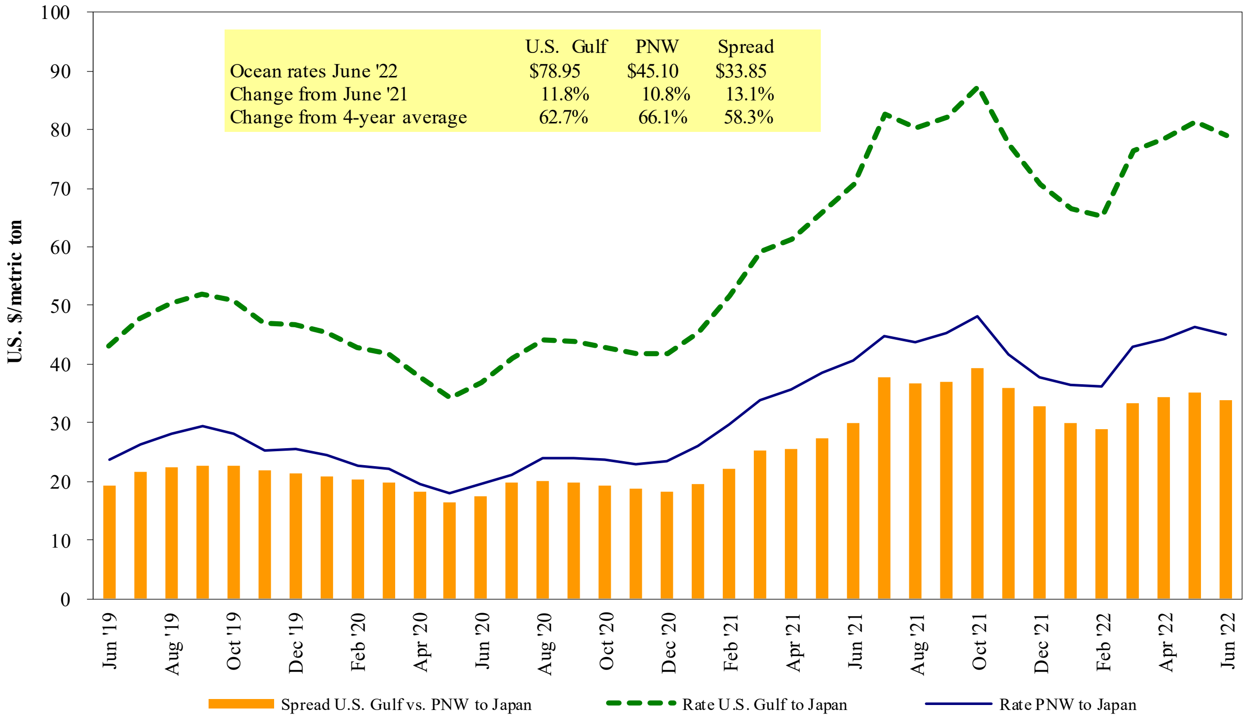
U.S. Gulf[1] vessel loading activity



[1]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 07/02/2022

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
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	Djibouti	Wheat	Jun 5/15, 2022	37,150	190.81*
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	Yemen	Wheat	Jul 10/20, 2022	27,000	169.50*
Brazil	N. China	Heavy grain	Mar 18/27, 2022	64,000	56.85
Argentina	Taiwan	Corn	May 1/Jun, 2022	65,000	85.00

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

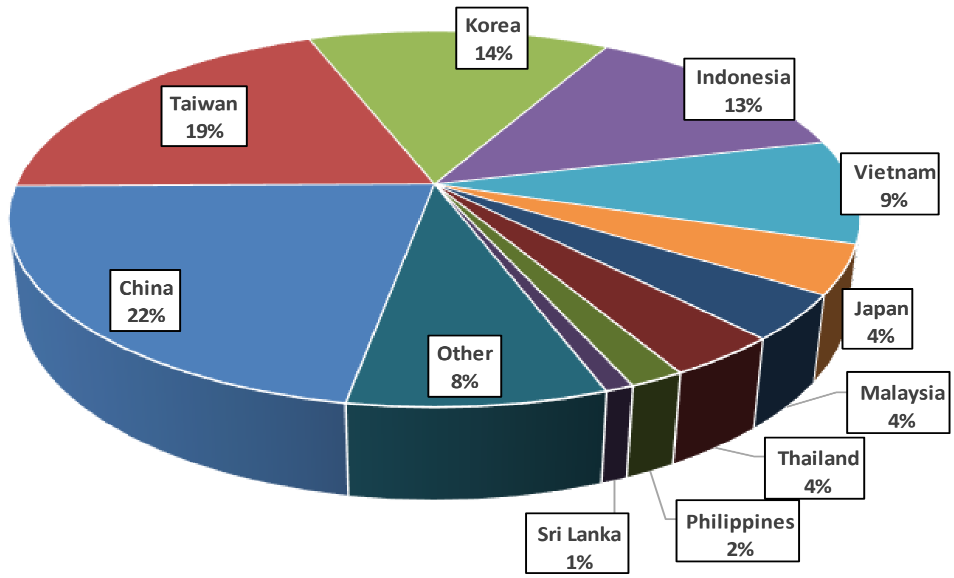
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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

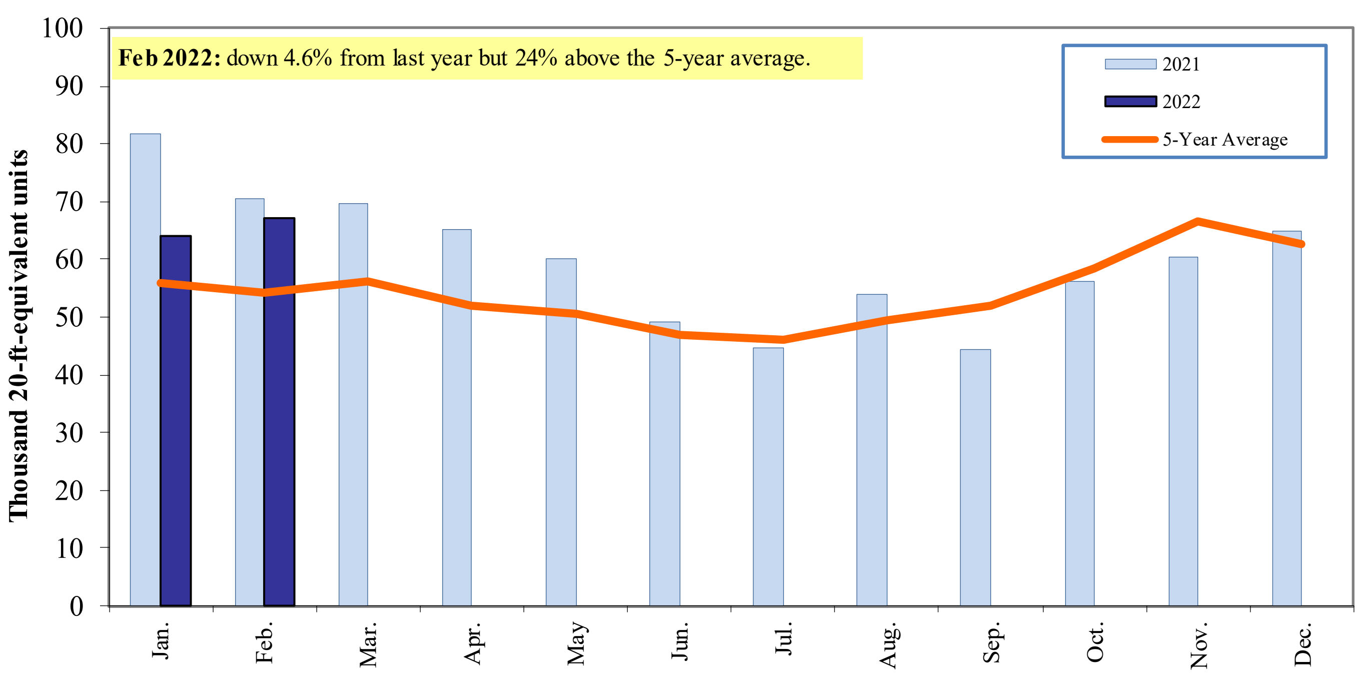


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

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.

Contacts and Links

Coordinators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Maria Williams	maria.williams@usda.gov	(202) 690 - 4430
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Rail Transportation		
Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690 - 3244
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Rich Henderson	richard.henderson2@usda.gov	(919) 855 - 7801
Barge Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Rich Henderson	richard.henderson2@usda.gov	(919) 855 - 7801
Truck Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Grain Exports		
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@usda.gov	(202) 720 - 7880
Editor		
Maria Williams	maria.williams@usda.gov	(202) 690-4430

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