



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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July 14, 2022

WEEKLY HIGHLIGHTS

STB Continues Emergency Service Period for UP To Deliver Trains to Grain Receiver

On July 1, the Surface Transportation Board (STB) [directed](#) Union Pacific Railroad (UP) to continue carrying out specific service commitments to Foster Poultry Farms (Foster Farms). In June, Foster Farms petitioned STB for an emergency service order because of significant deterioration in rail service from UP. STB agreed with the petition and directed UP to perform on service commitments for certain unit trains of corn to Foster Farms' facilities in California. Grain and feed shippers have had to deal with poor rail service throughout this year, and emergency service orders from STB could be a way for some of those shippers to obtain relief.

Diesel Price Drops by 10.7 Cents

From the week ending July 4 to the week ending July 11, the average U.S. [diesel fuel price](#) dropped 10.7 cents to \$5.568 per gallon, according to data from the Energy Information Administration. Diesel prices have dropped by 21.5 cents since the week of June 27. Nonetheless, diesel prices are still \$2.230 above the same time last year. In the grain-producing Midwest, diesel prices have dropped by 22.5 cents in the last 2 weeks. At \$5.542 per gallon, this week's Midwest diesel prices are \$2.281 above the same time last year.

California Legislators Ask Governor To Exempt Truckers From AB5

In a letter on July 5, a group of California legislators [asked their governor](#) to "take any means within [his] authority" to delay implementing Assembly Bill 5 (AB5) or to exempt truckers from the law. Truck drivers must be exempted to protect their critical role in the supply chain, the lawmakers argued. AB5 took effect on July 1 following 3 years of appeals, after the U.S. Supreme Court declined to hear the California Trucking Association's petition. The new law requires employers to prove workers are independent contractors, rather than direct employees, and the law could result in a reclassification of all owner-operators within the State. The trucking and agricultural industries are concerned that AB5 could force California's 70,000 independent truck owner-operators to stop driving. The industries also believe a sudden decline in available drivers would compound the State's ongoing supply-chain backlogs and reduce needed drayage capacity in the ports of Los Angeles, Long Beach, and Oakland.

Panama Canal Closes Locks for Scheduled Maintenance

From July 12 to 20, the Panama Canal Authority is closing the east lane of the Canal's Miraflores Panamax Locks for scheduled [maintenance work](#). During the outage, the locks' daily transit capacity is estimated at 21-23 vessels—down from the normal capacity of 34-36 vessels. No major delays are anticipated. The locks' exact transit capacity depends on vessel mix, transit restrictions, and other factors. A majority of U.S. grain destined to Asia transits the canal.

Snapshots by Sector

Export Sales

For the week ending June 30, [unshipped balances](#) of wheat, corn, and soybeans totaled 20.19 million metric tons (mmt), up 3 percent from the same time last year and down 8 percent from the previous week. Net [corn export sales](#) were -0.067 mmt, down significantly from the previous week. Net [soybean export sales](#) were -0.160 mmt, up 33 percent from the previous week. Net weekly [wheat export sales](#) for marketing year 2022/23 were 0.286 mmt, down 42 percent from last week.

Rail

U.S. Class I railroads originated 22,904 [grain carloads](#) during the week ending July 2. This was a 5-percent increase from the previous week, 15 percent more than last year, and 12 percent more than the 3-year average.

Average July shuttle [secondary railcar](#) bids/offers (per car) were \$13 below tariff for the week ending July 7. This was \$45 more than last week and \$184 more than this week last year.

Barge

For the week ending July 9, data for [barged grain movements](#) and grain barges [moved down river](#) are not available. For the week ending July 9, there were 584 grain barges [unloaded](#) in the New Orleans region, 47 percent more than last week.

Ocean

For the week ending July 7, 18 [oceangoing grain vessels](#) were loaded in the Gulf—22 percent fewer than the same period last year. Within the next 10 days (starting July 8), 35 vessels were expected to be loaded—8 percent fewer than the same period last year.

As of July 7, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$75.00. This was 2 percent less than the previous week. The rate from the Pacific Northwest to Japan was \$43.25 per mt, 2 percent less than the previous week.

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Second-Quarter Grain Inspections Decline Year to Year

During second quarter 2022, inspections of wheat, corn, and soybeans for export from all major U.S. ports totaled 29.4 million metric tons (mmt), according to USDA’s Federal Grain Inspection Service (FGIS). The amount of grain inspected was down 4 percent from the 5-year average and down 11 percent from second quarter 2021 (year to year) (fig. 1). Inspections of grain were down in two major U.S. port regions. In July, USDA estimated MY 2021/22 exports will be down 11 percent for corn, down 4 percent for soybeans, and down 19 percent for wheat, from MY 2020/21.

Grain Inspections by Region

PNW. In second quarter 2022, Pacific Northwest (PNW) grain inspections totaled 6.8 mmt, down 37 percent year to year and down 33 percent from the 5-year average. Second-quarter rail deliveries of grain to PNW ports were down 6 percent year to year.

Gulf. At 16.7 mmt, grain inspections in the U.S. Gulf fell 3 percent year to year and rose 9 percent from the 5-year average. The year-to-year decline mainly reflected a drop in corn and wheat

inspections. Rail deliveries of grain to Mississippi Gulf ports increased 39 percent year to year, and barge grain movements on the Mississippi River to the U.S. Gulf fell 19 percent.

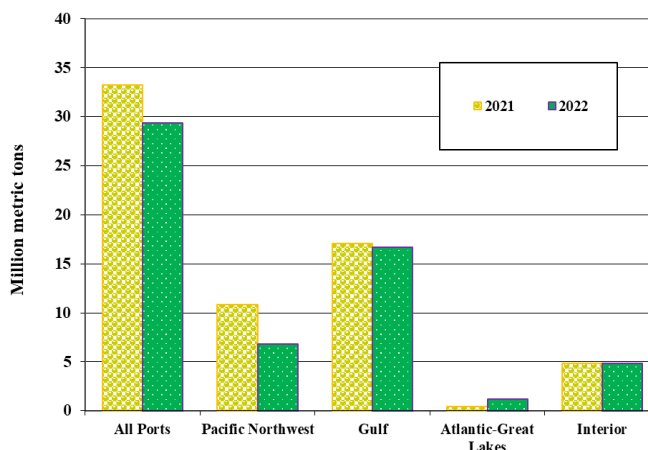
Atlantic-Great Lakes. At 1.2 mmt, grain inspections in the Atlantic-Great Lakes were up significantly year to year and up 52 percent from the 5-year average.

Interior. Interior grain inspections were 4.8 mmt, nearly unchanged from year to year and up 9 percent from the 5-year average. Corn and soybean inspections in the Interior remained strong during second quarter 2022. Of total Interior inspections, corn inspections represented 53 percent, and soybean inspections represented 34 percent.

Inspections by Commodity

Corn. Second-quarter corn inspections were 17.5 mmt, down 24 percent year to year and up 1 percent from the 5-year average (fig. 2). The year-to-year decline in corn inspections was due primarily to decreased demand from China and Japan. PNW corn inspections were 4.5 mmt, down 32 percent year to year and down 13 percent from the 5-year average. At 10.3 mmt, U.S. Gulf inspections of corn decreased 25 percent year to year and increased 7 percent from the 5-year average. Corn inspections in the Interior were 2.6 mmt, down 7 percent year to year and up 4 percent from the 5-year average. Corn inspections in the Atlantic-Great Lakes sharply increased, more than 432 percent of last year’s total.

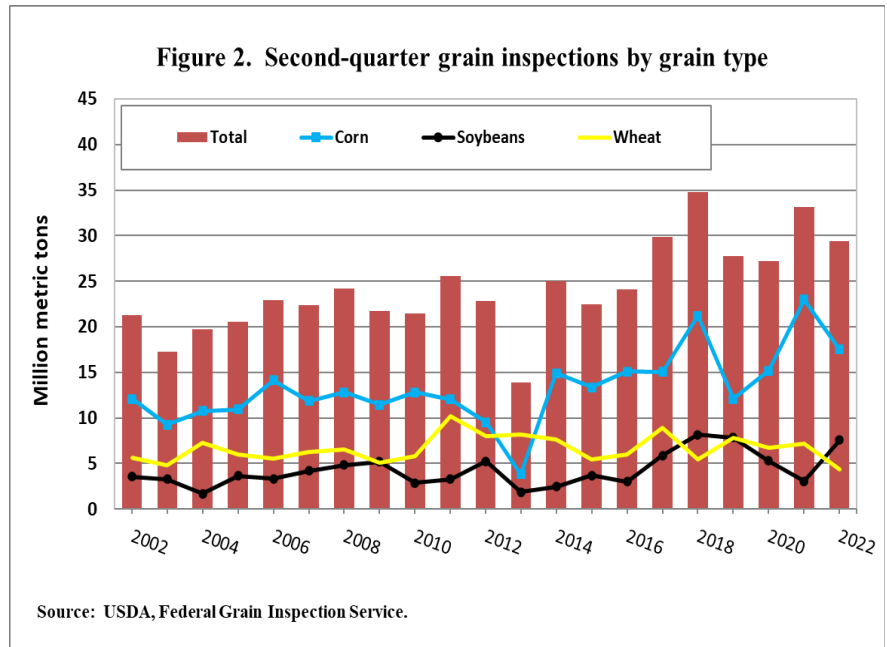
Figure 1. Second-quarter grain inspections by port region



Source: USDA, Federal Grain Inspection Service.

Soybeans. Second-quarter soybean inspections were up significantly from last year. At 7.6 mmt, soybean inspections were up 150 percent year to year and up 25 percent from the 5-year average (fig. 2). The large increase in soybean inspections was due mainly to higher shipments to China and other countries in Africa and Europe.

During the second quarter, PNW soybean inspections reached 0.565 mmt, up 927 percent year to year, but 42 percent below the 5-year average. At 4.5 mmt, second-quarter U.S. Gulf soybean inspections were up 115 percent year to year and up 41 percent from the 5-year average. At 1.6 mmt, Interior inspections of soybeans were up 22 percent year to year and up 11 percent from the 5-year average.



Wheat. Second-quarter wheat inspections were 4.3 mmt, down 39 percent year to year and down 40 percent from the 5-year average (fig. 2). At 1.7 mmt, second-quarter wheat inspections in PNW marked the lowest on record: they were down 58 percent year to year and down 56 percent from the 5-year average. Total wheat inspections in the U.S. Gulf were down 10 percent year to year and down 26 percent from the 5-year average. Atlantic-Great Lakes wheat inspections hit a record low at 0.113 mmt—down 44 percent from year to year. At 0.636 mmt, Interior second-quarter wheat inspections were the region’s second highest on record. This total was up 29 percent from the 5-year average and down 22 percent year to year, primarily because of decreased shipments to Canada, China, and Mexico.

Market Outlook

USDA’s July [World Agricultural Supply and Demand Estimates \(WASDE\)](#) projected corn exports in MY 2022/23 to be 60.96 mmt, which would be a 2-percent decline in corn exports from the MY 2021/22 total. In the same report, USDA projected soybean exports in MY 2022/23 to be 58.11 mmt, which would be a 2-percent decline from the MY 2021/22 total. USDA also projected MY 2022/23 wheat exports to be 21.77 mmt, unchanged from the MY 2021/2022 total. Corn projections remain unchanged; soybean projections decreased; and wheat projections increased from projections in the June *WASDE* report.

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Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Non-Shuttle	Shuttle		Gulf	Pacific
07/13/22	374	324	235	227	335	307
07/06/22	381	324	234	224	342	312

¹Indicator: Base year 2000 = 100. Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan (\$/metric ton); n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

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

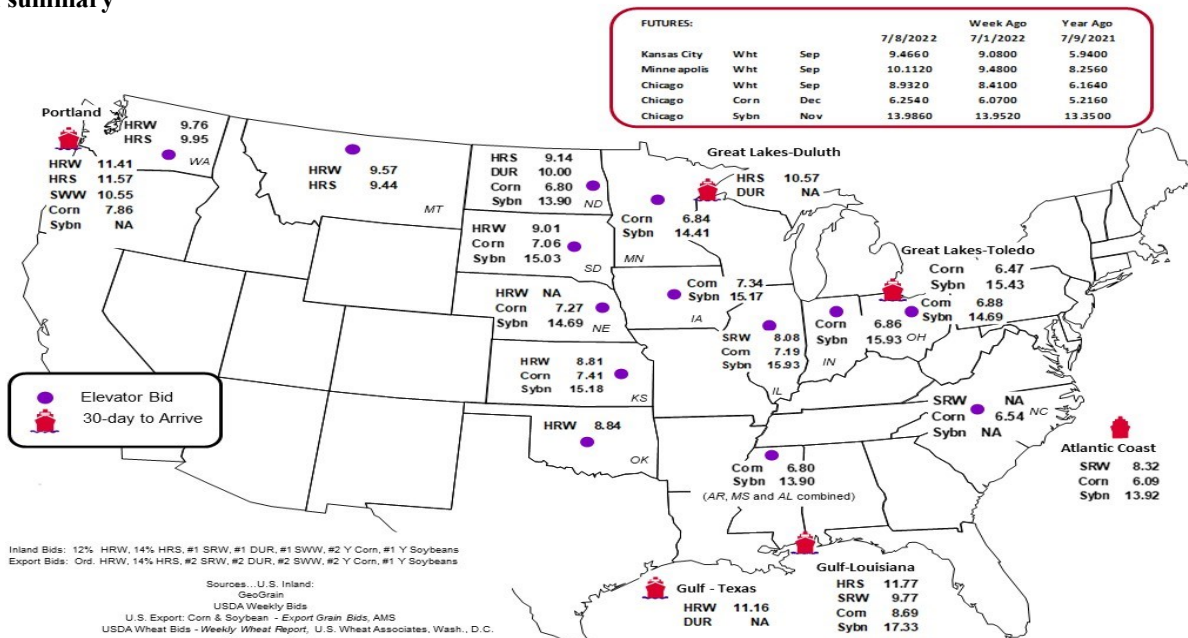
Commodity	Origin-destination	7/8/2022	7/1/2022
Corn	IL-Gulf	-1.50	-1.36
Corn	NE-Gulf	-1.42	-1.32
Soybean	IA-Gulf	-2.16	-2.14
HRW	KS-Gulf	-2.35	-2.29
HRS	ND-Portland	-2.43	-2.09

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		Pacific	Atlantic &		Total	Week ending	Cross-border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf				
7/6/2022 ^p	808	339	2,480	222		3,849	7/2/2022	2,661
6/30/2022 ^r	816	326	4,482	378		6,002	6/25/2022	2,890
2022 YTD ^f	37,150	23,995	150,612	14,292		226,049	2022 YTD	72,926
2021 YTD ^f	34,972	39,106	164,761	9,887		248,726	2021 YTD	72,529
2022 YTD as % of 2021 YTD	106	61	91	145		91	% change YTD	101
Last 4 weeks as % of 2021 ²	173	40	97	-		99	Last 4wks. % 2021	88
Last 4 weeks as % of 4-year avg. ²	126	41	87	121		85	Last 4wks. % 4 yr.	101
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

¹Data is incomplete as it is voluntarily provided.

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

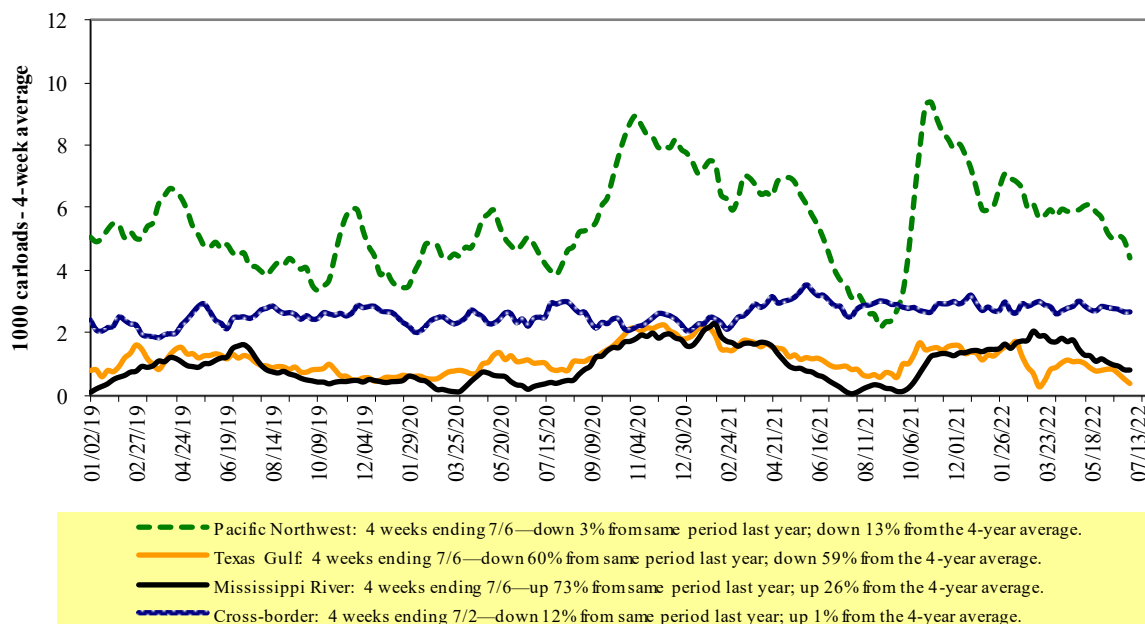
³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

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: 7/2/2022	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,593	2,987	10,467	1,597	6,260	22,904	3,677	3,184
This week last year	1,216	2,168	9,808	1,002	5,670	19,864	2,804	3,968
2022 YTD	47,439	62,801	297,747	32,831	150,825	591,643	89,999	92,265
2021 YTD	49,909	67,166	327,876	29,077	167,943	641,971	118,283	137,836
2022 YTD as % of 2021 YTD	95	94	91	113	90	92	76	67
Last 4 weeks as % of 2021*	108	112	98	109	105	103	96	65
Last 4 weeks as % of 3-yr. avg.**	108	104	97	122	112	103	82	63
Total 2021	93,935	120,910	609,890	64,818	318,002	1,207,555	210,113	242,533

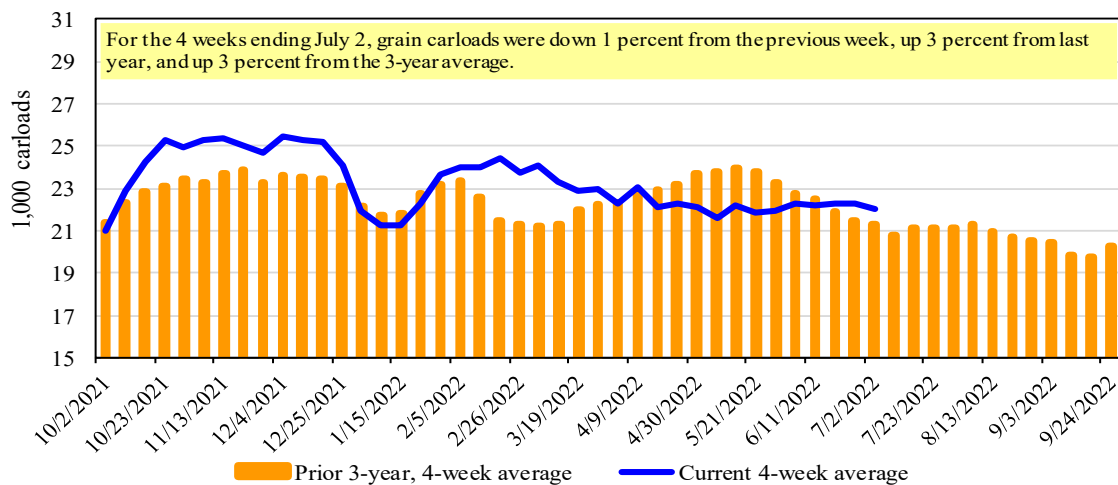
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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 offerings¹ (\$/car)²

For the week ending: 7/7/2022		Delivery period							
		Jul-22	Jul-21	Aug-22	Aug-21	Sep-22	Sep-21	Oct-22	Oct-21
BNSF ³	COT grain units	0	no offer	0	no bids	no offer	no bids	no offer	no bids
	COT grain single-car	0	no offer	4	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

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

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

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

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

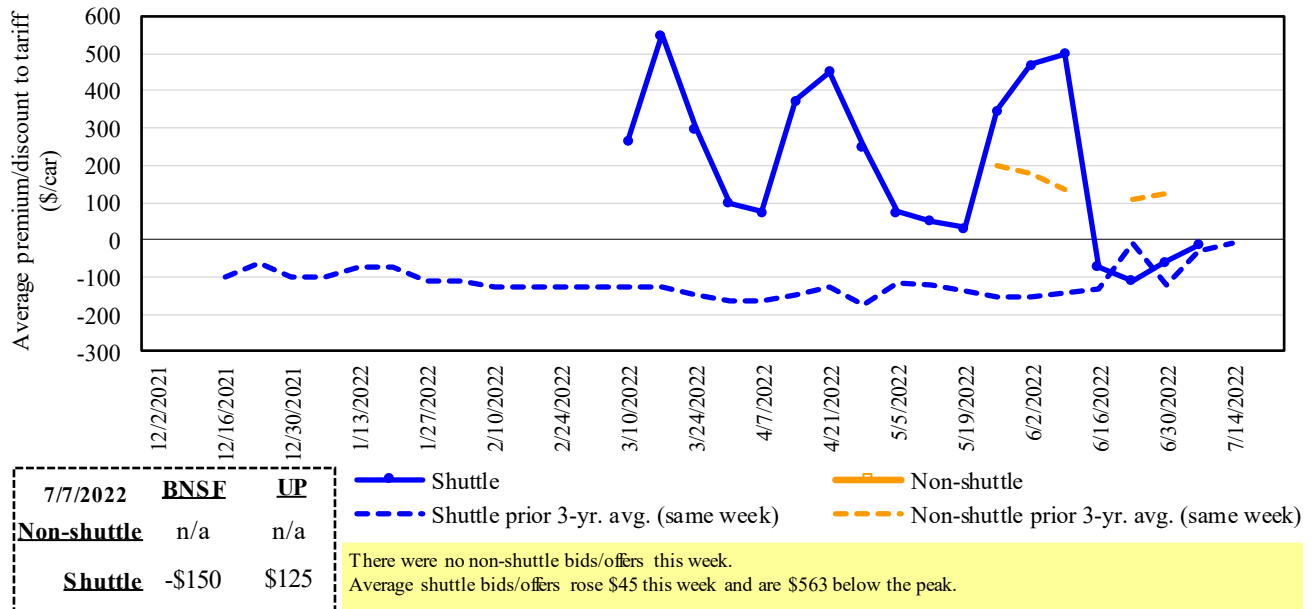
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

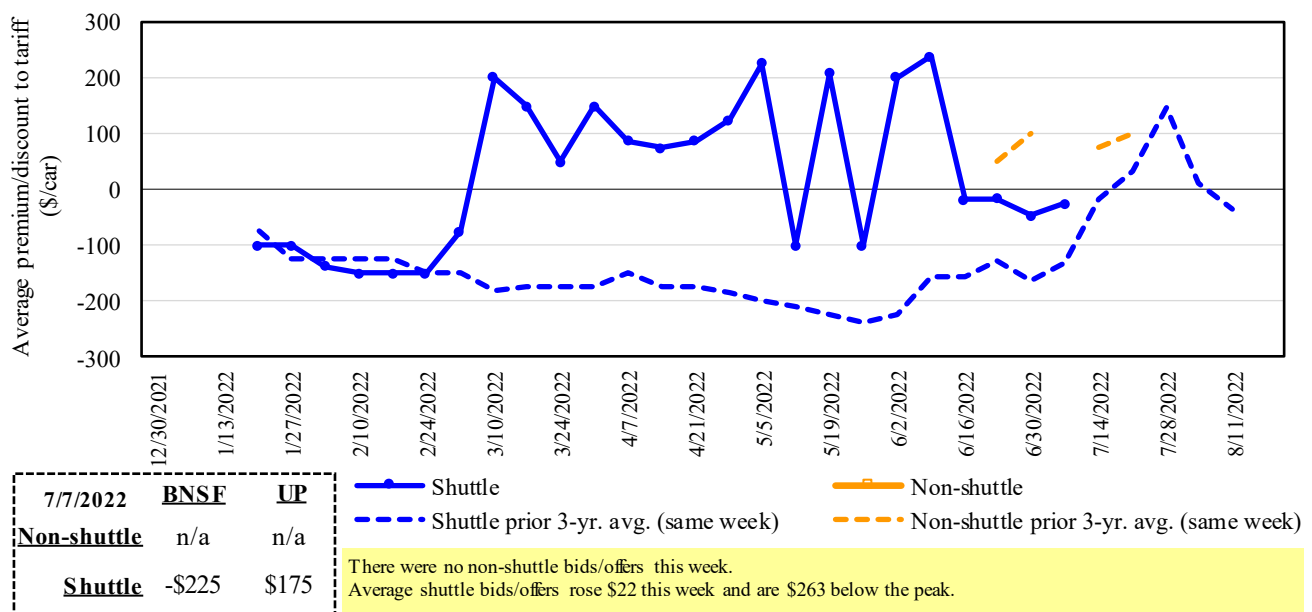
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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.

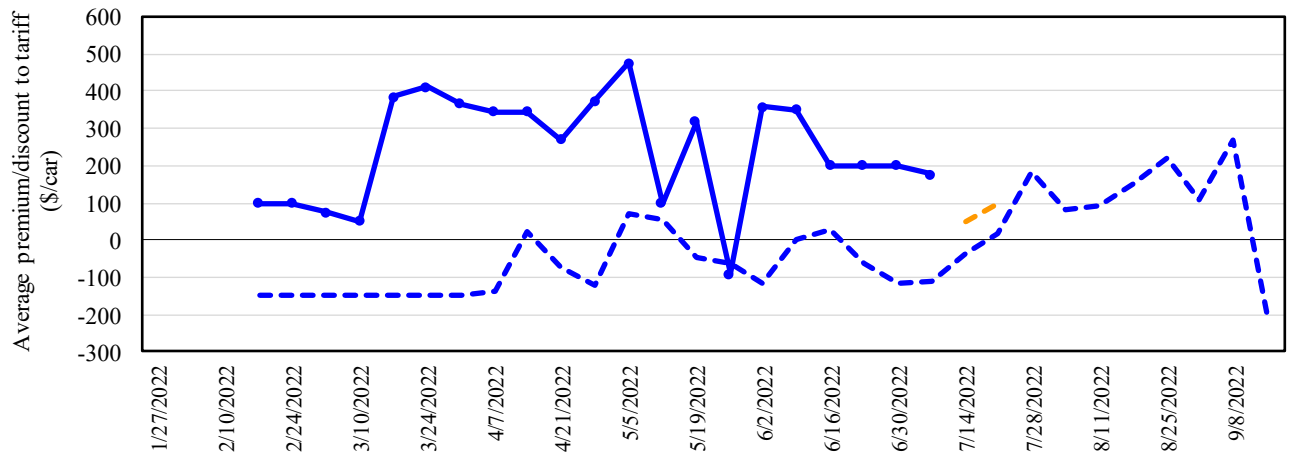
Figure 5
Secondary market bids/offers for railcars to be delivered in August 2022



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



7/7/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-\$150	\$500

—●— 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 \$300 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:		Delivery period					
		7/7/2022	Jul-22	Aug-22	Sep-22	Oct-22	Nov-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
Shuttle	BNSF-GF	(150)	(225)	(150)	1,225	1,000	800
	Change from last week	98	19	(50)	0	0	25
	Change from same week 2021	131	100	75	513	n/a	n/a
	UP-Pool	125	175	500	1,200	n/a	n/a
	Change from last week	(8)	25	0	0	n/a	n/a
Change from same week 2021	238	400	700	513	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 shipments¹

July 2022	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,695	\$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	

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of

75-120 cars that meet railroad efficiency requirements.

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

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

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

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

Table 8

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

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

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

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

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

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

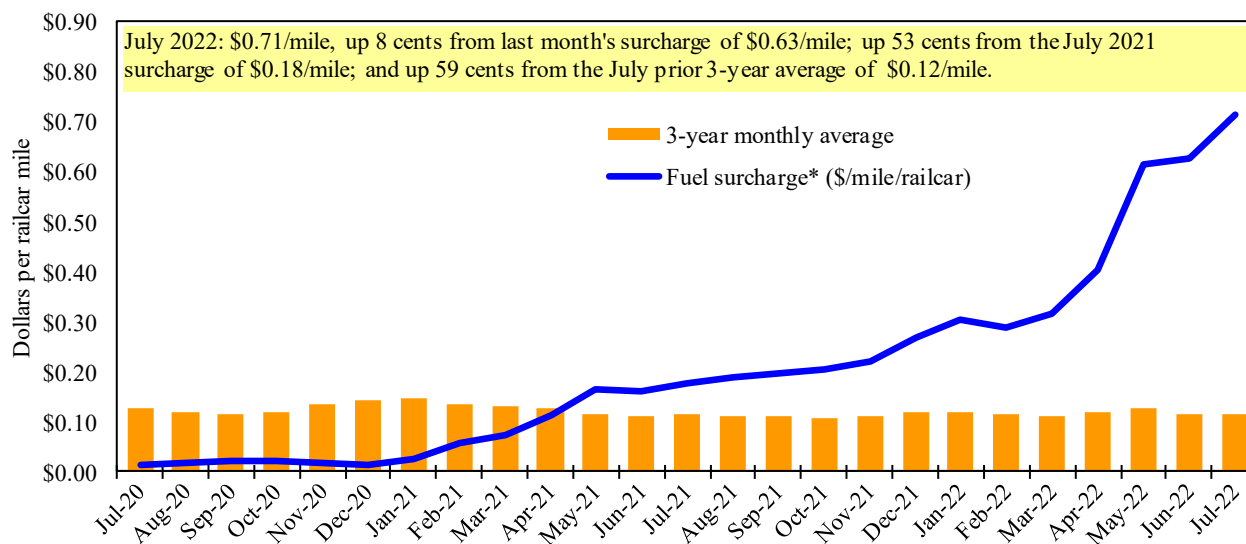
⁵ As of January 1, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico.

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 average¹



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.

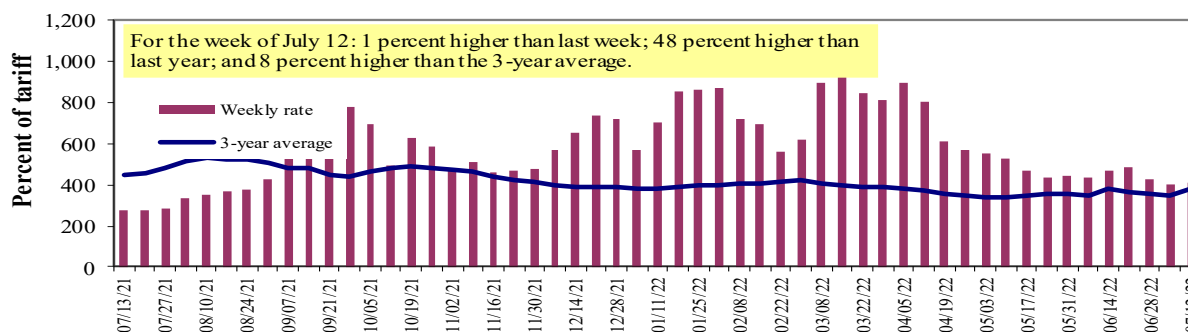
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.
*Source: USDA, Agricultural Marketing Service.

Table 9

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	7/12/2022	547	483	408	332	430	430	329
	7/5/2022	530	437	404	324	441	441	335
\$/ton	7/12/2022	33.86	25.70	18.93	13.25	20.17	17.37	10.33
	7/5/2022	32.81	23.25	18.75	12.93	20.68	17.82	10.52
Current week % change from the same week:								
	Last year	54	73	48	66	106	106	74
	3-year avg. ²	34	38	-	41	91	91	50
Rate¹	August	646	611	589	535	575	575	543
	October	904	871	862	799	851	851	791

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

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

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

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

Map Credit: USDA, Agricultural Marketing Service

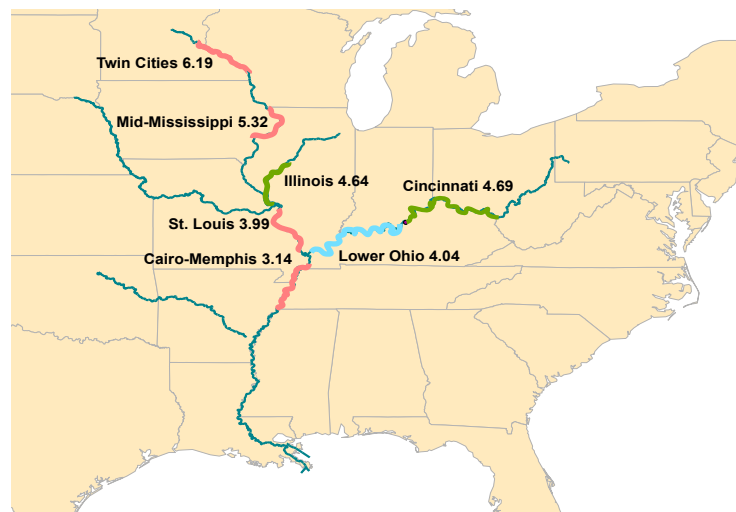
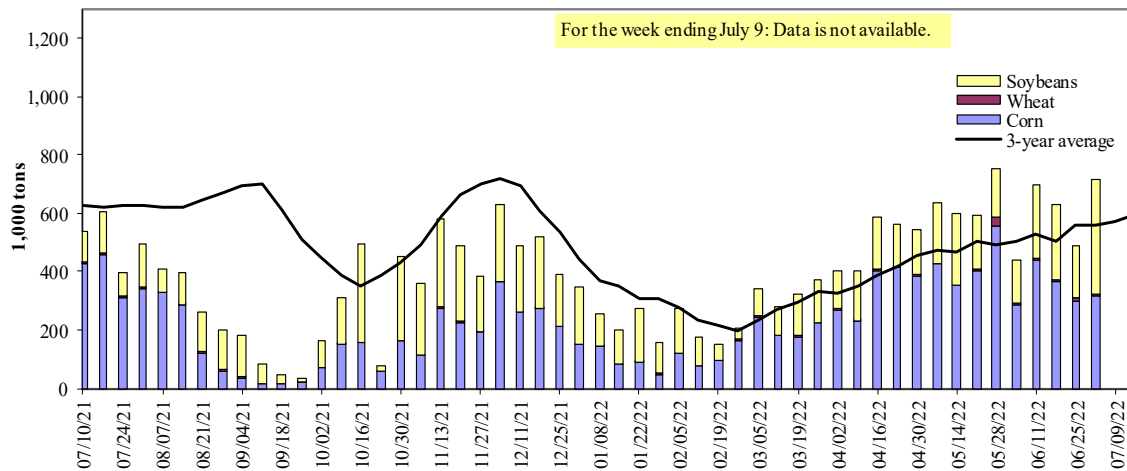


Figure 10

Barge movements on the Mississippi River¹ (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) Data for the week ending 07/09/22 is not available.

For the week ending 07/09/2022	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	n/a	n/a	n/a	n/a	n/a
Winfield, MO (L25)	n/a	n/a	n/a	n/a	n/a
Alton, IL (L26)	n/a	n/a	n/a	n/a	n/a
Granite City, IL (L27)	n/a	n/a	n/a	n/a	n/a
Illinois River (La Grange)					
	n/a	n/a	n/a	n/a	n/a
Ohio River (Olmsted)					
	n/a	n/a	n/a	n/a	n/a
Arkansas River (L1)					
	n/a	n/a	n/a	n/a	n/a
Weekly total - 2022	n/a	n/a	n/a	n/a	n/a
Weekly total - 2021	496	65	136	2	698
2022 YTD ¹	n/a	n/a	n/a	n/a	n/a
2021 YTD ¹	16,550	774	4,649	193	22,166
2022 as % of 2021 YTD	n/a	n/a	n/a	n/a	n/a
Last 4 weeks as % of 2021 ²	n/a	n/a	n/a	n/a	n/a
Total 2021	23,516	1,634	11,325	297	36,772

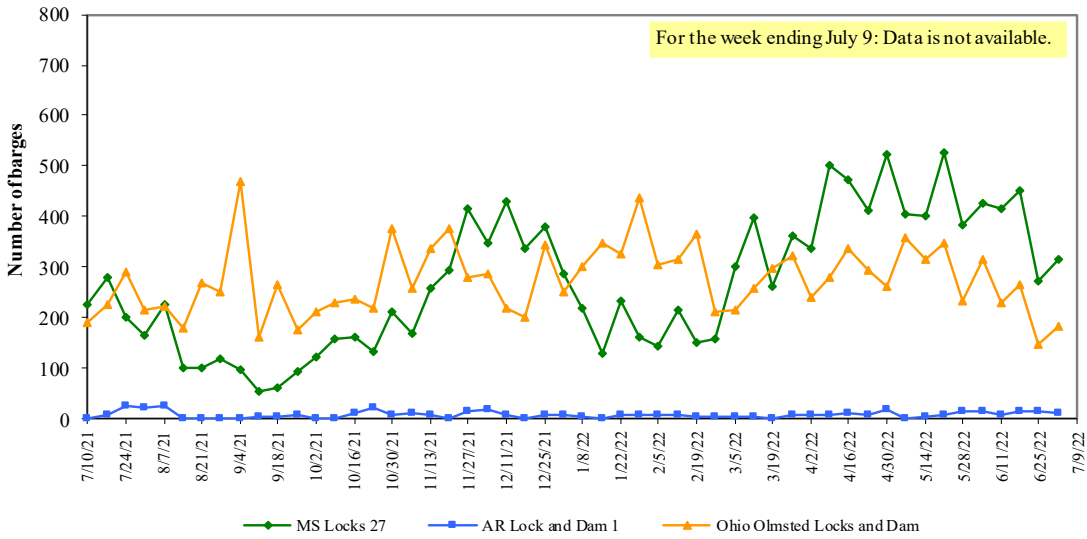
¹ Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

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 database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

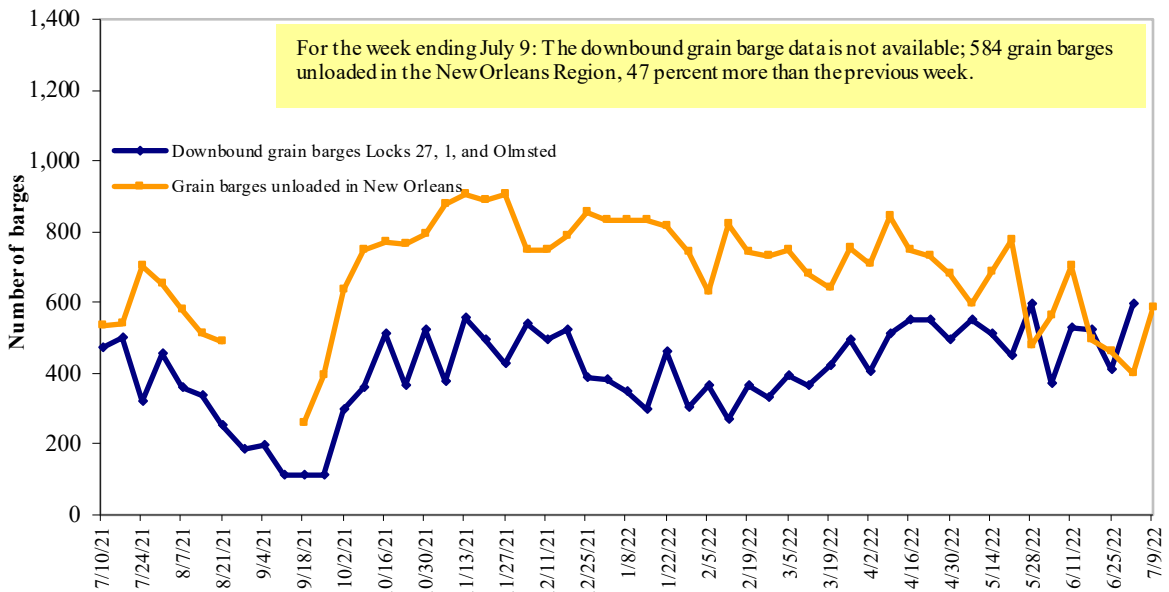
Figure 11
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 7/11/2022 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.600	-0.113	2.288
	New England	5.820	-0.099	2.575
	Central Atlantic	5.865	-0.099	2.388
	Lower Atlantic	5.479	-0.118	2.266
II	Midwest	5.542	-0.105	2.281
III	Gulf Coast	5.217	-0.113	2.134
IV	Rocky Mountain	5.674	-0.058	2.080
V	West Coast	6.285	-0.104	2.380
	West Coast less California	5.941	-0.095	2.373
	California	6.665	-0.114	2.478
Total	United States	5.568	-0.107	2.230

¹Diesel 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.

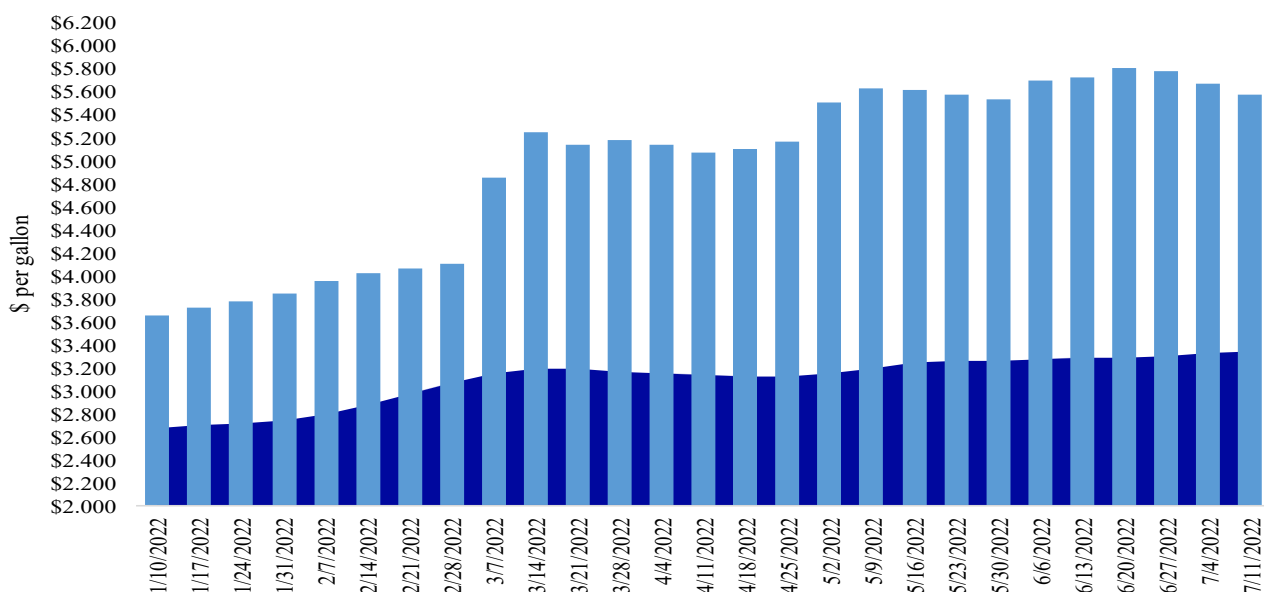
NA = Not Available

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending July 11, the U.S. average diesel fuel price decreased 10.7 cents from the previous week to \$5.568 per gallon, 223.0 cents above the same week last year.

■ Last year \$3.338 ■ Current year \$5.568



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.

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				
Export balances¹									
6/30/2022	1,359	1,004	1,249	903	94	4,610	7,859	7,724	20,193
This week year ago	1,514	932	1,610	1,079	8	5,144	11,034	3,410	19,589
Cumulative exports-marketing year²									
2021/22 YTD	436	191	528	274	18	1,447	52,498	52,165	106,111
2020/21 YTD	655	151	425	284	32	1,547	58,686	58,494	118,727
YTD 2021/22 as % of 2020/21	67	0	124	97	0	94	89	89	89
Last 4 wks. as % of same period 2020/21*	84	102	79	81	1,005	86	85	254	115
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 importers¹ of U.S. corn

For the week ending 06/30/2022	Total commitments ²			% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23	2021/22	2020/21		
	next MY	current MY	last MY		
	1,000 mt -				
Mexico	2045.4	16,535	15,017	10	14,817
Japan	600.3	9,749	10,667	(9)	11,082
China	2804	14,722	23,329	(37)	7,920
Columbia	100	4,359	3,883	12	4,491
Korea	0	1,474	3,526	0	3,302
Top 5 importers	5,550	46,839	56,422	(17)	41,613
Total U.S. corn export sales	6,488	60,357	69,720	(13)	53,145
% of projected exports	11%	97%	100%		
Change from prior week ²	111	(67)	173		
Top 5 importers' share of U.S. corn export sales	86%	78%	81%		78%
USDA forecast July 2022	61,069	62,341	70,051	(11)	
Corn use for ethanol USDA forecast, July 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 (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 importers¹ of U.S. soybeans

For the week ending 6/30/2022	Total commitments ²			% change current MY from last MY	Exports ³ 3-yr. avg. 2018-20
	2022/23 next MY	2021/22 current MY	2020/21 last MY		
					- 1,000 mt -
China	7,765	30,490	35,827	(15)	21,666
Mexico	801	5,373	4,785	12	4,754
Egypt	228	4,154	2,777	50	3,093
Indonesia	9	1,656	2,257	(27)	2,325
Japan	130	2,419	2,313	5	2,275
Top 5 importers	8,933	44,093	47,959	(8)	34,113
Total U.S. soybean export sales	13,738	59,890	61,904	(3)	50,758
% of projected exports	24%	101%	100%		
change from prior week ²	240	(160)	64		
Top 5 importers' share of U.S. soybean export sales	65%	74%	77%		67%
USDA forecast, July 2022	58,174	59,128	61,608	(4)	

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

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

³FAS marketing year ranking reports (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 importers¹ of all U.S. wheat

For the week ending 6/30/2022	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2018-20
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
Mexico	1,112	1,118	(1)	3,388
Philippines	935	1,001	(7)	3,121
Japan	614	753	(18)	2,567
Korea	410	448	(9)	1,501
Nigeria	308	515	(40)	1,490
China	7	339	(98)	1,268
Taiwan	170	239	(29)	1,187
Indonesia	11	2	511	1,131
Thailand	125	124	1	768
Italy	92	44	109	681
Top 10 importers	3,783	4,582	(17)	17,102
Total U.S. wheat export sales	6,057	6,691	(9)	24,617
% of projected exports	28%	31%		
change from prior week ²	286	291		
Top 10 importers' share of U.S. wheat export sales	62%	68%		69%
USDA forecast, July 2022	21,798	21,907	(0)	

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

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

³FAS 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 07/07/22	Previous week*	Current week as % of previous	2022 YTD*	2021 YTD*	2022 YTD as % of 2021 YTD	Last 4-weeks as % of:		2021 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	115	164	70	4,758	8,336	57	90	63	13,243
Corn	128	195	66	7,965	11,401	70	76	97	13,420
Soybeans	0	73	0	4,495	3,758	120	n/a	77	14,540
Total	243	432	56	17,218	23,495	73	88	80	41,203
Mississippi Gulf									
Wheat	127	45	284	2,194	1,427	154	101	102	3,202
Corn	609	432	141	21,744	26,475	82	78	108	38,498
Soybeans	280	191	146	12,020	10,503	114	246	93	27,159
Total	1,016	668	152	35,958	38,406	94	99	103	68,858
Texas Gulf									
Wheat	22	0	n/a	1,684	2,164	78	32	26	3,888
Corn	10	0	n/a	388	271	143	101	65	627
Soybeans	0	0	n/a	2	656	0	n/a	n/a	1,611
Total	32	0	n/a	2,074	3,092	67	36	29	6,126
Interior									
Wheat	61	79	77	1,520	1,474	103	119	139	2,973
Corn	147	226	65	4,961	5,121	97	113	112	10,157
Soybeans	78	120	65	3,722	3,369	110	128	96	6,525
Total	286	425	67	10,203	9,965	102	118	110	19,656
Great Lakes									
Wheat	0	0	n/a	111	229	49	0	0	536
Corn	18	0	n/a	118	39	304	249	748	145
Soybeans	13	13	100	234	34	693	185	98	592
Total	31	13	240	463	301	154	117	63	1,273
Atlantic									
Wheat	1	0	n/a	38	77	49	28	84	128
Corn	6	8	73	182	14	n/a	n/a	n/a	85
Soybeans	5	64	8	1,527	1,057	144	546	197	2,184
Total	11	71	16	1,747	1,148	152	765	279	2,397
U.S. total from ports*									
Wheat	326	287	113	10,305	13,707	75	78	64	23,969
Corn	917	861	107	35,358	43,322	82	84	107	62,932
Soybeans	376	460	82	21,999	19,378	114	223	95	52,612
Total	1,619	1,609	101	67,663	76,407	89	97	93	139,512

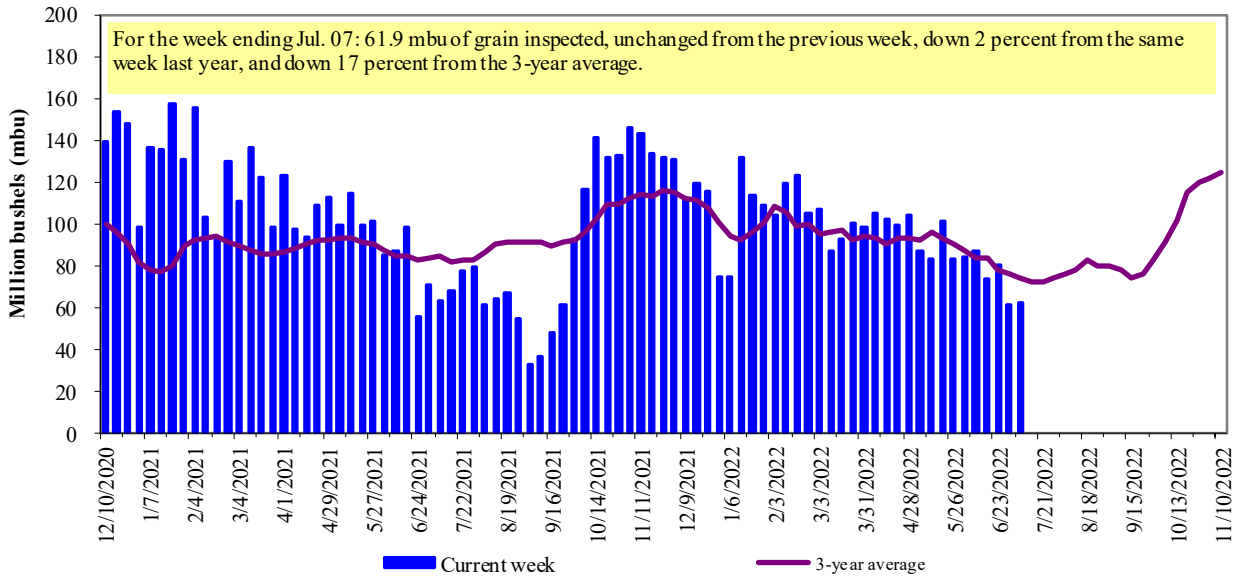
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

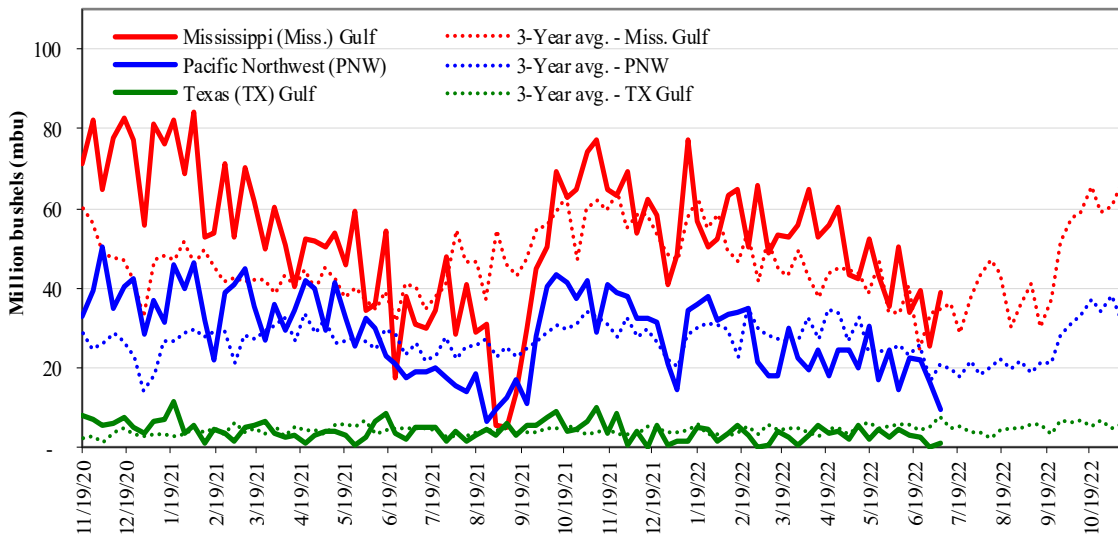


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



<u>Week ending 07/07/22 inspections (mbu):</u>	<u>Percent change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
MS Gulf: 38.9	Last wk:	up 52	n/a	up 56	down 43
PNW: 9.3	Last Year (same wk):	up 27	down 75	up 12	down 51
TX Gulf: 1.2	3-yr avg. (4-wk. mov. Avg):	up 16	down 79	up 2	down 57

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

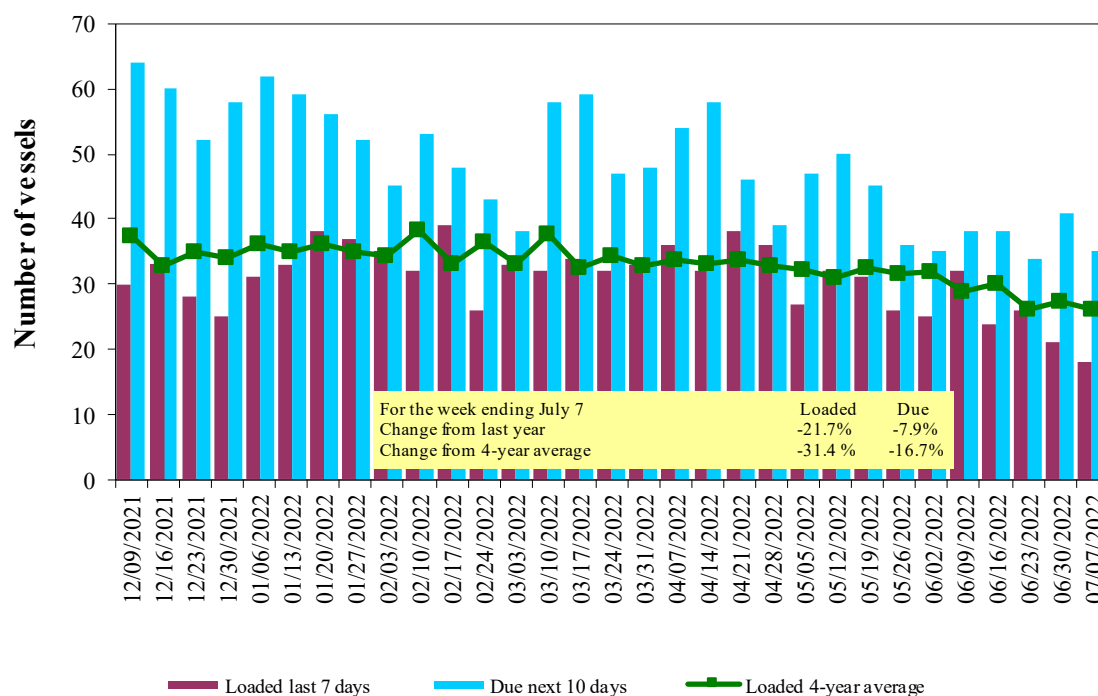
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded	Due next	In port
		7-days	10-days	
7/7/2022	22	18	35	8
6/30/2022	15	21	41	5
2021 range	(10...57)	(5...48)	(15...69)	(4...27)
2021 average	34	32	49	15

Source: USDA, Agricultural Marketing Service.

Figure 16

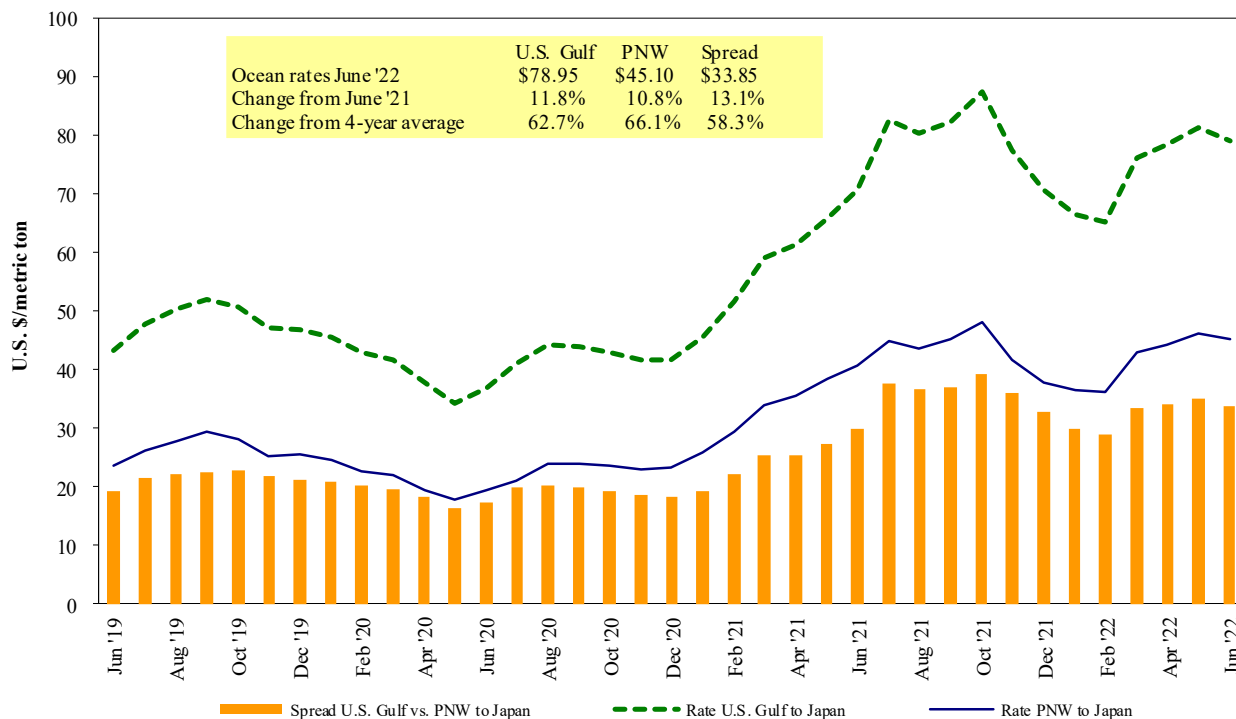
U.S. Gulf¹ vessel loading activity



¹U.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 07/09/2022

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

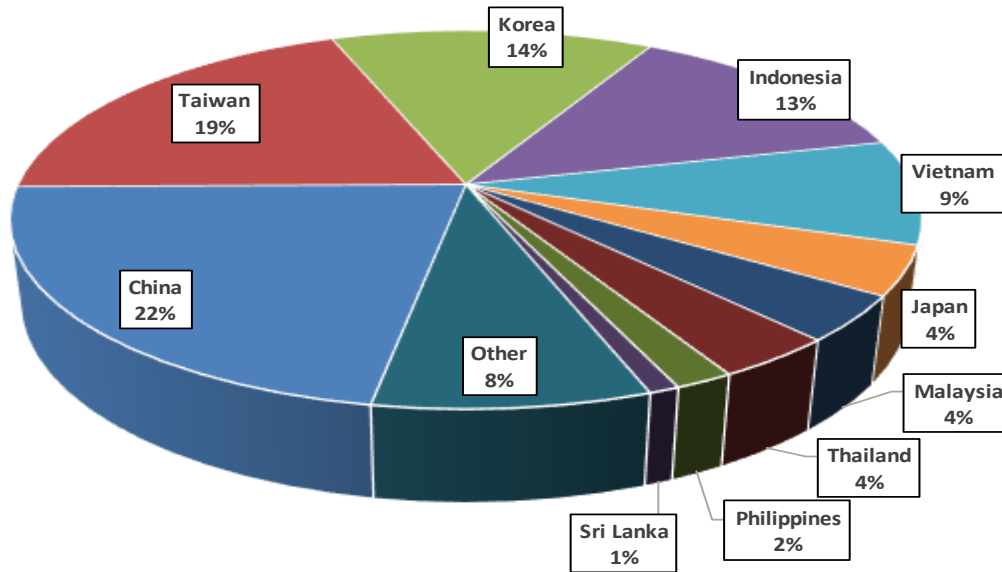
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

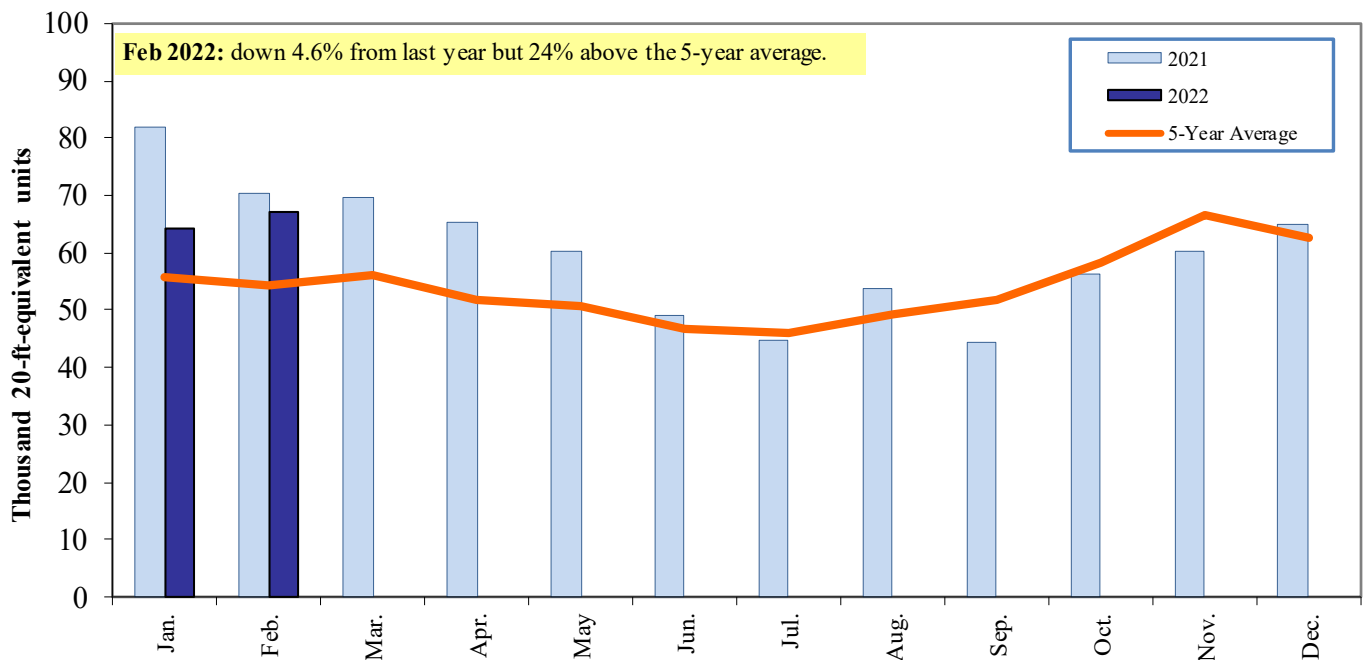
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Feb 2022



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.

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