United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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July 21, 2022

Contents

The next release is July 28, 2022

WEEKLY HIGHLIGHTS

President Appoints Emergency Board To Block Rail Strike

Effective July 18, the President signed an executive order (EO) to prevent—for at least 60 days—a nationwide strike by U.S. railway workers that would deprive the country of essential transportation services. As outlined by the EO, a Presidential Emergency Board (PEB) of arbitrators will hold hearings and issue recommendations in 30 days. The unions and railroads will then have 30 additional days to negotiate a new deal before entering a "self-help" period in mid-September, during which railroads can lock out workers and workers can strike. The core issues of the dispute involve salary, benefits, and working conditions. If the railroads and unions cannot agree on a contract, Congress will likely have to act to prevent further disruption of an already stressed supply chain. Because the start of the self-help period coincides with the start of the harvest season, grain shippers could be especially impacted.

Truckers Block Terminal Gates at Port of Oakland in Protest of AB5

On July 19, roughly 1,000 owner-operator truckers protesting the enactment of California's independent contractor law, Assembly Bill 5 (AB5), blocked the gates of the Port of Oakland's SSA terminal (the port's largest terminal), as well as the TraPac and Everport terminals. Approximately 100 members of the International Longshore and Warehouse Union Local 10 refused to cross the protest line. The protests shut down most container movement at the port, and continuing actions may either severely restrict operations or keep the port completely shut down. These disruptions come just as unions and West Coast port employers are negotiating a high-stakes labor contract. Together, the Ports of Oakland, Long Beach, and Los Angeles moved 47 percent of U.S. containerized grain/oilseeds exports (animal feed, hay, bulk grains, and soybeans) in 2021. On July 11, 70 trade organizations wrote a letter to California's Governor asking for an executive order to temporarily pause enforcing AB5. The groups also ask him to call labor and industry to negotiate "to preserve small business trucking in the state of California and prevent further disruptions." The Governor's office has reiterated that the Governor will not delay or suspend AB5.

Grain Journal's Annual Transportation Issue Released

Grain Journal recently released its May/June edition, which focuses on transportation. This edition features a discussion of top transportation issues as identified by the National Grain and Feed Association (NGFA) and grain facility managers, as well as an update on river infrastructure projects. NGFA and industry leaders cited several issues negatively impacting the Nation's supply chain, such as poor rail service (e.g., lack of timely arrival and availability), sharp increases in fuel costs, and a shortage of truck drivers and parts. NGFA said poor rail service has caused its members to incur an estimated $100 million "in additional freight costs and lost revenues" in first quarter 2022. NGFA also praised the U.S. Army Corps of Engineers for prioritizing crucial inland waterway projects by modernizing locks and dams on the Upper Mississippi and Illinois Waterway.

Snapshots by Sector

Export Sales

For the week ending July 7, **unshipped balances** of wheat, corn, and soybeans totaled 19.28 million metric tons (mmt), up 4 percent from the same time last year and down 5 percent from the previous week. Net **corn export sales** were 0.059 mmt, down significantly from the previous week. Net **soybean export sales** were −0.363 mmt, down significantly from the previous week. Net weekly **wheat export sales** for marketing year 2022/23 were 1.017 mmt, up significantly from last week.

Rail

U.S. Class I railroads originated 17,031 **grain carloads** during the week ending July 9. This was a 26-percent decrease from the previous week, unchanged from last year, and 15 percent fewer than the 3-year average.

Average July shuttle **secondary railcar** bids/offers (per car) were $33 below tariff for the week ending July 14. This was $21 less than last week and $58 more than this week last year.

Barge

For the week ending July 16, **barged grain movements** totaled 709,790 tons. This was 2.4 percent lower than the previous week and 5.2 percent lower than the same period last year.

For the week ending July 16, 446 grain barges **moved down river**—9 fewer barges than last week. There were 592 grain barges **unloaded** in the New Orleans region, 1 percent more than last week.

Ocean

For the week ending July 14, 25 **oceangoing grain vessels** were loaded in the Gulf—4 percent more than the same period last year. Within the next 10 days (starting July 15), 39 vessels were expected to be loaded—17 percent fewer than the same period last year.

As of July 14, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $71.00. This was 5 percent less than the previous week. The rate from the Pacific Northwest to Japan was $41.00 per mt, 5 percent less than the previous week.

Fuel

For the week ending July 18, the U.S. average **diesel fuel price** decreased 13.6 cents from the previous week to $5.432 per gallon, 208.8 cents above the same week last year.

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Feature Article/Calendar

Bulk Ocean Freight Rates Rose in Second Quarter

So far in 2022, ocean freight rates for shipping dry bulk items, including grain, have responded to the Russia-Ukraine conflict, fluctuating Chinese demand, and rising global inflation. These influences were especially notable in the second quarter. Although average quarterly ocean freight rates fell in fourth quarter 2021 and first quarter 2022, they rose in second quarter 2022. Ocean freight rates for shipping grain (wheat, corn, and soybeans) rose from first quarter 2022 to second quarter 2022 (quarter to quarter); from second quarter 2021 to second quarter 2022 (year to year); and from the 4-year average.

Ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged $79.81 per metric ton (mt) in second quarter 2022—up 15 percent quarter to quarter, up 21 percent year to year, and up 69 percent from the 4-year average (see table and figure). From the Pacific Northwest (PNW) to Japan, rates averaged $45.29 per mt—up 18 percent quarter to quarter, up 18 percent year to year, and up 72 percent from the 4-year average. From the U.S. Gulf to Europe, rates were $33.36 per mt—up 29 percent quarter to quarter, up 44 percent year to year, and up 81 percent from the 4-year average.

Ocean freight rates for grain routes during second quarter 2022

Route	Apr.	May	Jun.	2nd quarter 2022	Change from 1st qtr. '22	Change from 2nd qtr. '21	Change from 4-yr. avg.
	--$/mt--			--$/mt--	Percent		
U.S. Gulf to Japan	78.50	81.38	79.56	79.81	15	21	69
PNW to Japan	44.25	46.25	45.38	45.29	18	18	72
Spread*	34.25	35.13	34.18	34.52	12	25	65
U.S. Gulf to Europe	30.00	34.63	35.44	33.36	29	44	81

*Spread is the difference between ocean freight rates for shipping grain from the U.S. Gulf to Japan and PNW to Japan.

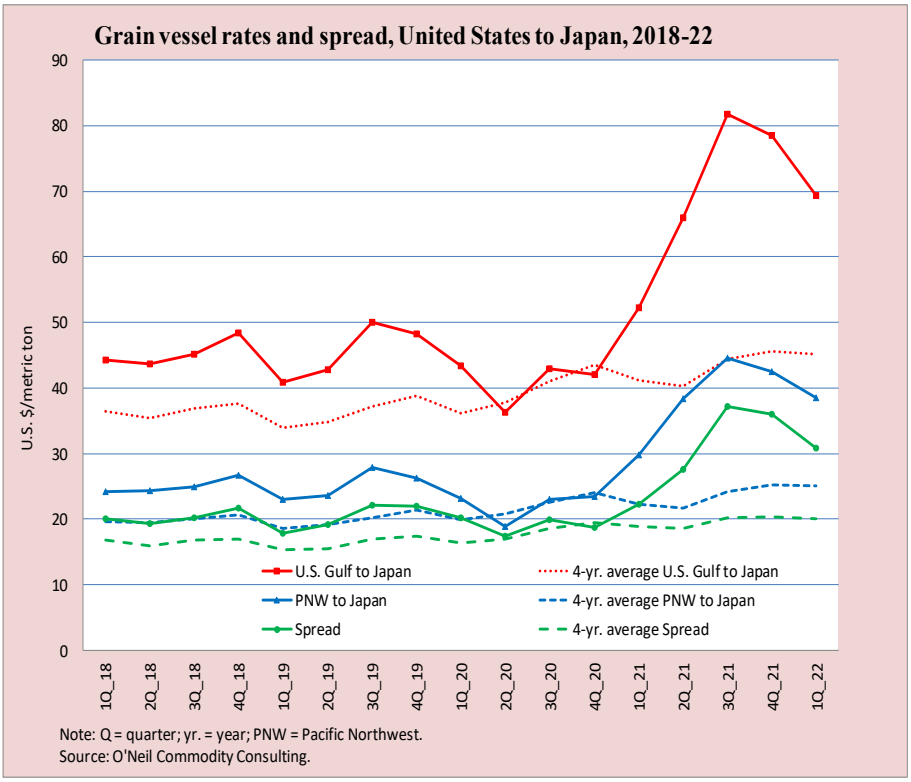
Note: qtr. = quarter; avg. = average; mt = metric ton; yr. = year; PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Monthly Changes in Rates

April. Ocean freight rates rose in April as the world continued to deal with the effects of the war in Ukraine, coupled with logistic challenges in ports around the world. At the same time, pandemic lockdowns stymied vessel movements at major Chinese ports. From China, the additional congestion quickly radiated to ports around the globe. Because a fifth of the world's container ships were stuck in ports, container shipments received the brunt of these impacts. However, bulk shipments were subject to spill-over effects.

Despite pandemic-related disruptions to shipments, China still imported 86.06 million tons



of iron ore in April, versus 87.28 million tons in March—a 1.4 percent dip from month to month and 12.7 percent decline from year to year (Nasdaq). From January to April, China's iron ore imports stood at 354.4 million tons, down 7.1 percent from the same period a year earlier. In addition to sustaining strong iron ore imports, China exported 4.98 million tons of steel in April, compared to 4.95 million tons in March. All of China's steel-production and steel-export activity helped to drive up ocean freight rates in April.

May. In May, pandemic-induced labor shortages in Australia and weather-related supply disruptions in Brazil eased. These more benign trade conditions prompted an even stronger appetite for iron ore imports by China and higher ocean freight rates. In May, China imported 92.52 million tons of iron ore—up 8 percent from April and up 3 percent from the previous year (Reuters, *Hellenic Shipping News*). Also, the U.S. annual inflation rate climbed to 8.6 percent in May, the highest since December 1981 (CNBC). Further boosting ocean freight rates, the bunker fuel prices of the world's 20 largest ports of very low sulfur fuel oil (International Maritime Organization grade 0.5 percent) averaged $949 per mt in May—up 4 percent from April and up 83 percent from the previous year (shipandbunker.com).

June. Although still relatively high, ocean freight rates fell slightly in June, as congestion eased in some Chinese ports. For example, at the height of Omicron-variant COVID-19 cases in Shanghai, the wait times for tankers, bulkers, and container ships stretched up to 66 hours in April. However, by June, wait times were down to 28 hours (*Container News*). In addition, coal trade to Europe has been very strong because of efforts to offset the losses of Russian gas, one effect of the ongoing Russo-Ukrainian conflict (*Hellenic Shipping News*).

Current Market Analysis and Outlook

As of July 14, the rate for shipping 1 mt of grain from the U.S. Gulf to Japan was $71.00—5 percent less than the previous week and 15 percent less than for the same period a year earlier. The rate from PNW to Japan was $41.00 per mt—5 percent less than the previous week and 9 percent less than the same period in 2021.

Although ocean freight rates are still up since the beginning of the year, those levels are tenuous. On the one hand, the war in Ukraine and economic sanctions persist, and inflation has increased worldwide. High inflation and energy costs have contributed to rising vessel operating costs and, consequently, higher ocean freight rates. Vessel supply has increased very slowly because deliveries of newly built vessels have been very slow. According to the June 2022 *Drewry Shipping Insight* (Drewry), only 2.2 million deadweight tons (mdwt) of newly built vessels were delivered in June, while the total dry bulk fleet stood at 955.8 mdwt. In 2022 and 2023, some market analysts expect fleet growth to remain slow because of rising financing costs, new environmental regulations, and market uncertainty (IHS Markit, Seeking Alpha). In addition, inactivity in the dry bulk sector has remained high, rising to 72.4 mdwt in May, its second-highest level since it reached 78 mdwt in January 2022 (Drewry).[1] Slow fleet growth and a high level of inactivity help in restricting vessel supply and keep ocean freight rates high even when the demand for bulk shipments appears to be weak.

On the other hand, rising inflation in the United States, Europe, and other parts of the world have led to higher prices for grain and other commodities. The rising prices may weaken demand for grain and other bulk commodities, which could reduce the demand for vessels and lower ocean freight rates. Furthermore, U.S. and Australian suppliers have been unable to compensate for the lack of Ukraine's grain exports, which have been severely curtailed by the war. According to Drewry, all these factors contribute to a low world demand for ocean shipping of grain.

Other factors, besides grain trade, may also influence ocean freight rates. The Chinese Government is encouraging power utilities to switch to domestic coal, limiting coal imports. The Government's decarbonization plans may also cut China's steel production and reduce the demand for iron ore imports (Drewry). To the degree these scenarios materialize, they will reduce the demand for bulk vessels and put additional downward pressure on ocean freight rates. *Surajudeen.Olowolayemo@usda.gov*

[1] "Inactivity" refers to idle capacity—i.e., vessels not in operation because of repair needs or for economic or other reasons. For the purposes of analysis, inactivity is measured in deadweight tons.

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
07/20/22	365	324	237	255	318	291
07/13/22	374	324	235	227	335	307

[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	7/15/2022	7/8/2022
Corn	IL–Gulf	-0.54	-1.50
Corn	NE–Gulf	-0.39	-1.42
Soybean	IA–Gulf	-1.59	-2.16
HRW	KS–Gulf	-2.37	-2.35
HRS	ND–Portland	-2.44	-2.43

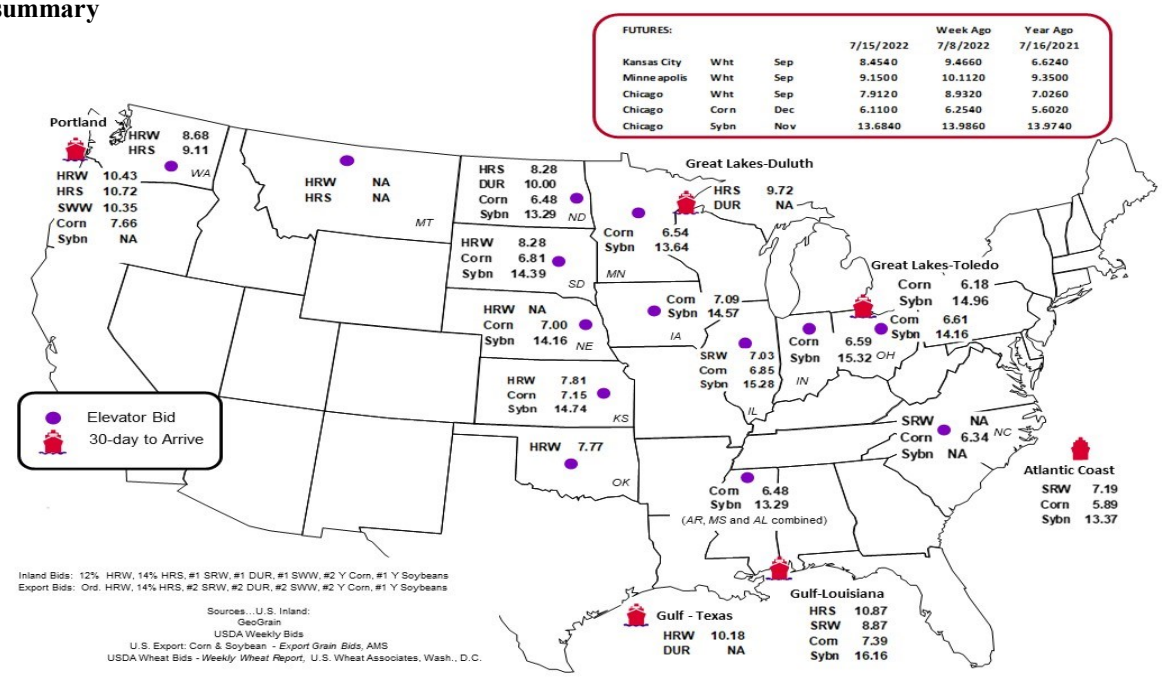
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
7/13/2022[p]	415	701	1,950	187	3,253	7/9/2022	2,800
7/6/2022[r]	808	339	2,480	222	3,849	7/2/2022	2,661
2022 YTD[r]	37,565	24,696	152,562	14,479	229,302	2022 YTD	75,726
2021 YTD[r]	35,078	39,765	167,721	9,887	252,451	2021 YTD	74,566
2022 YTD as % of 2021 YTD	107	62	91	146	91	% change YTD	102
Last 4 weeks as % of 2021[2]	192	45	88	-	93	Last 4wks. % 2021	96
Last 4 weeks as % of 4-year avg.[2]	117	45	74	106	75	Last 4wks. % 4 yr.	106
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.

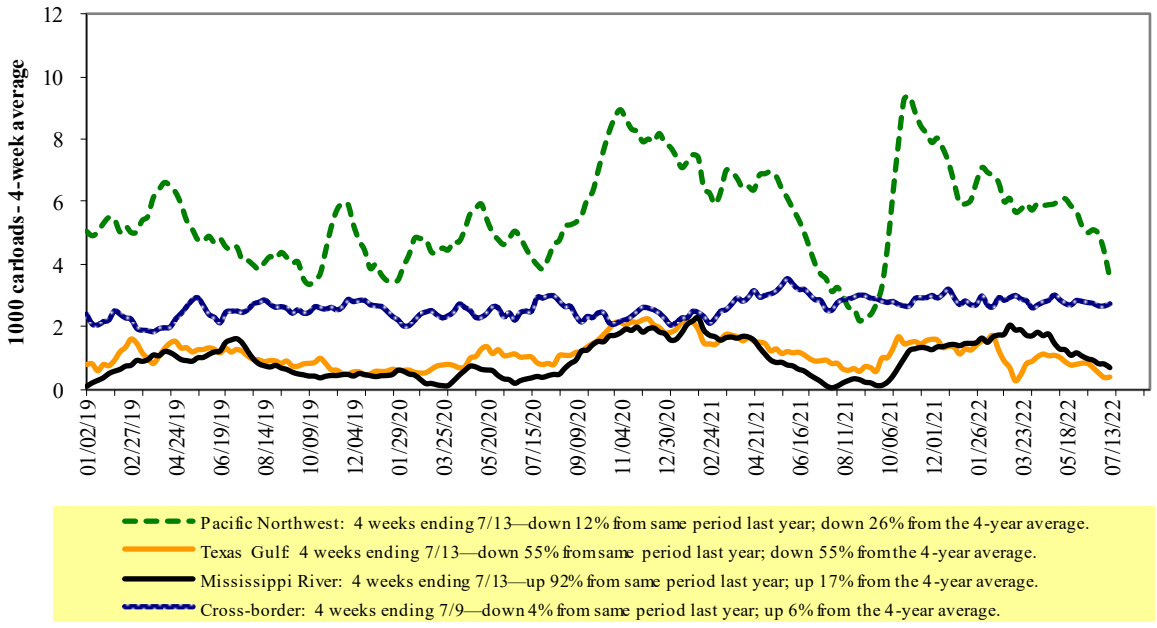
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
7/9/2022	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,734	2,632	7,321	817	4,527	17,031	3,834	2,505
This week last year	2,087	2,160	7,715	896	4,226	17,084	2,247	2,891
2022 YTD	49,173	65,433	305,068	33,648	155,352	608,674	93,833	94,770
2021 YTD	51,996	69,326	335,591	29,973	172,169	659,055	120,530	140,727
2022 YTD as % of 2021 YTD	95	94	91	112	90	92	78	67
Last 4 weeks as % of 2021*	98	115	106	113	105	107	115	69
Last 4 weeks as % of 3-yr. avg.**	102	103	95	114	109	101	89	65
Total 2021	93,935	120,858	609,890	64,818	318,002	1,207,503	210,115	242,533

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

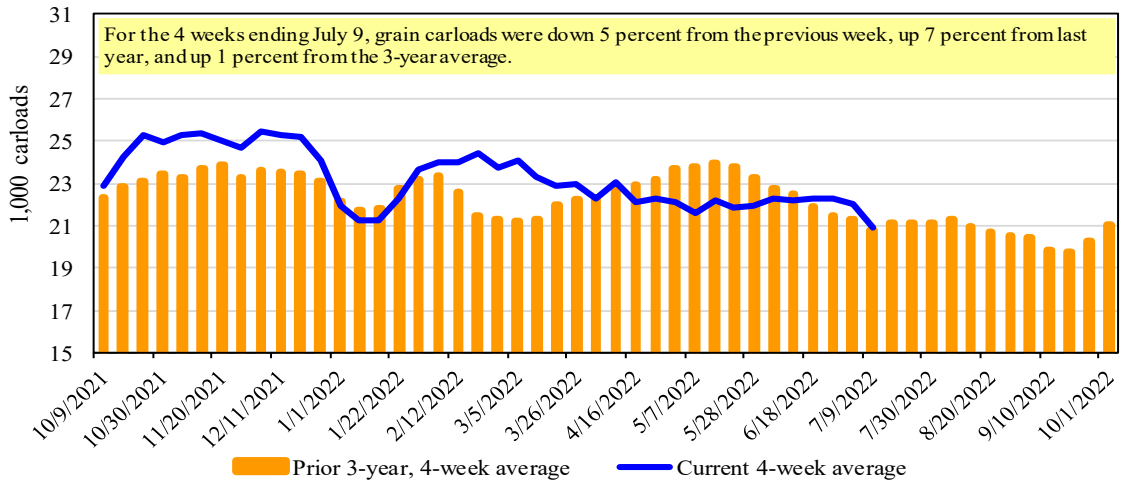
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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:		Delivery period							
7/14/2022		Jul-22	Jul-21	Aug-22	Aug-21	Sep-22	Sep-21	Oct-22	Oct-21
BNSF[3]	COT grain units	no offer	no offer	0	0	0	no bids	0	no bids
	COT grain single-car	no offer	no offer	14	0	287	0	80	2
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a

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

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

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

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

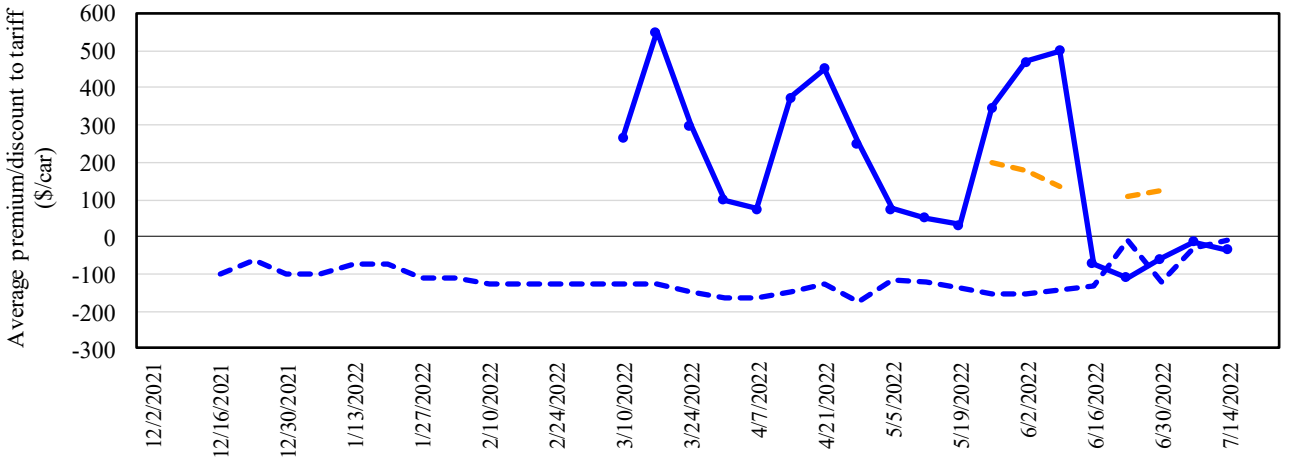
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

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

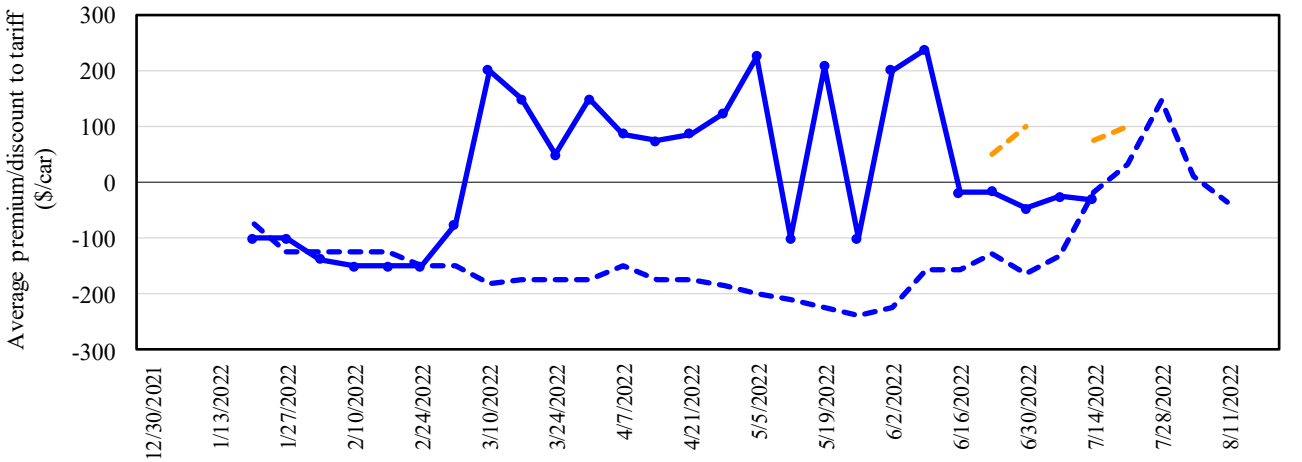


7/14/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$100	$33

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $21 this week and are $583 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



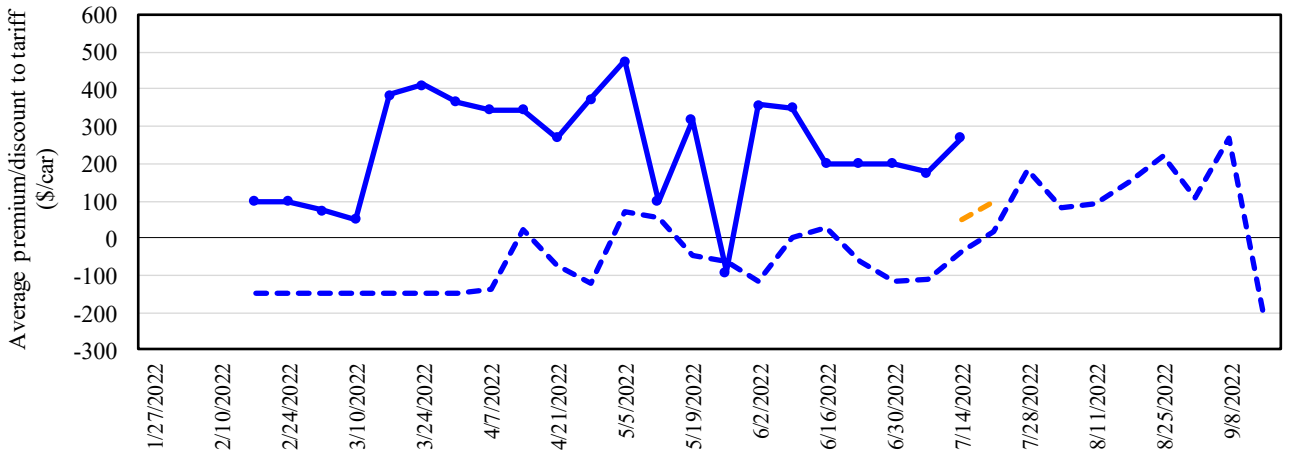
7/14/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$163	$100

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $6 this week and are $269 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



7/14/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$267	$275

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $96 this week and are $204 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: 7/14/2022		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**	**(100)**	**(163)**	**267**	**1,475**	**n/a**	**733**
	Change from last week	50	63	417	250	n/a	(67)
	Change from same week 2021	133	125	533	781	n/a	n/a
	UP-Pool	**33**	**100**	**275**	**1,200**	**n/a**	**n/a**
	Change from last week	(92)	(75)	(225)	0	n/a	n/a
	Change from same week 2021	(17)	263	475	500	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

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

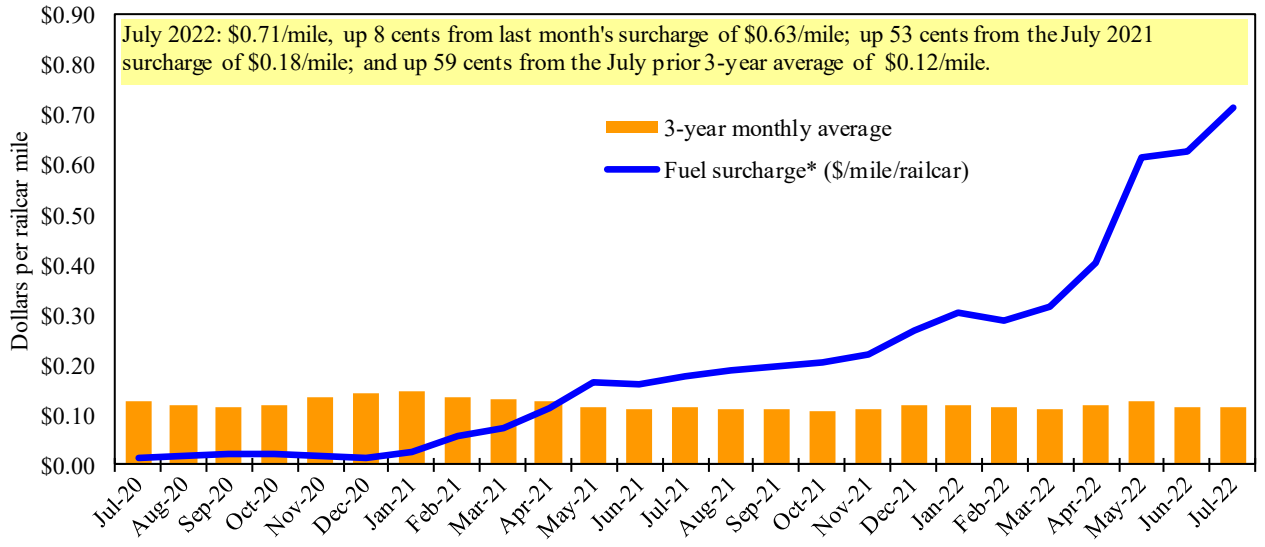
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[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.

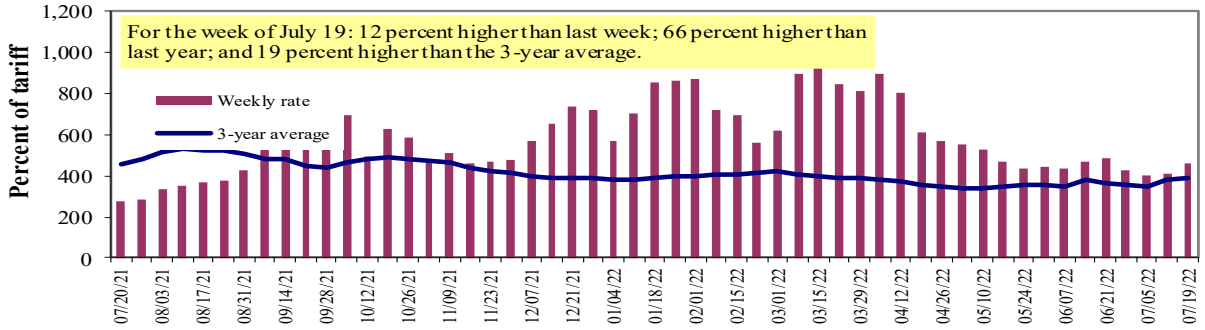
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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

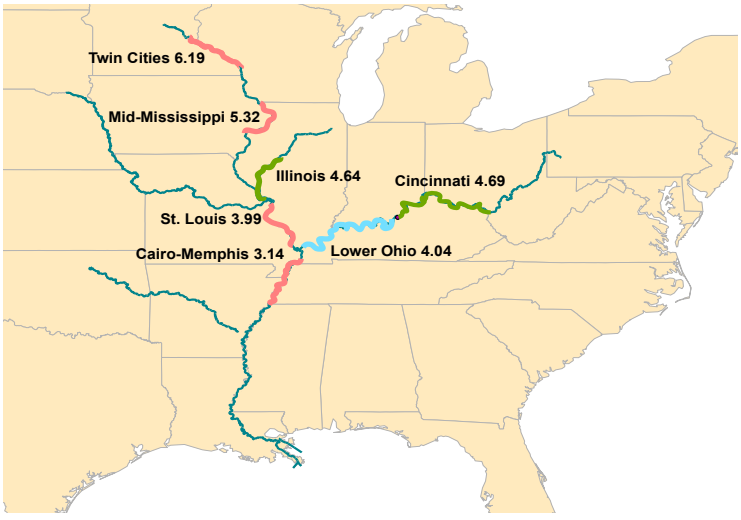
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	7/19/2022	565	510	459	373	461	461	354
	7/12/2022	547	483	408	332	430	430	329
$/ton	7/19/2022	34.97	27.13	21.30	14.88	21.62	18.62	11.12
	7/12/2022	33.86	25.70	18.93	13.25	20.17	17.37	10.33
Current week % change from the same week:								
	Last year	59	81	66	84	126	126	89
	3-year avg. [2]	38	42	-	51	104	104	59
Rate[1]	August	638	601	584	535	574	574	544
	October	903	869	863	800	847	847	789

[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

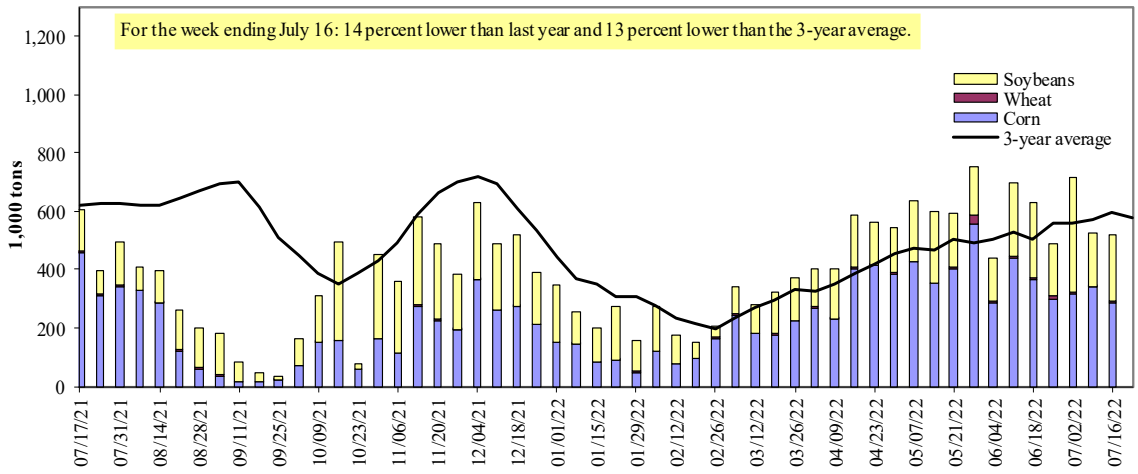
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 07/16/2022	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	131	0	135	0	266
Winfield, MO (L25)	154	2	200	0	356
Alton, IL (L26)	177	3	173	0	354
Granite City, IL (L27)	288	3	228	0	519
Illinois River (La Grange)	82	0	49	0	132
Ohio River (Olmsted)	65	26	47	9	147
Arkansas River (L1)	0	36	7	0	43
Weekly total - 2022	353	66	282	9	710
Weekly total - 2021	522	60	162	5	749
2022 YTD[1]	11,486	1,027	6,951	162	19,625
2021 YTD[1]	17,072	834	4,811	198	22,915
2022 as % of 2021 YTD	67	123	144	82	86
Last 4 weeks as % of 2021[2]	70	125	211	353	101
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.

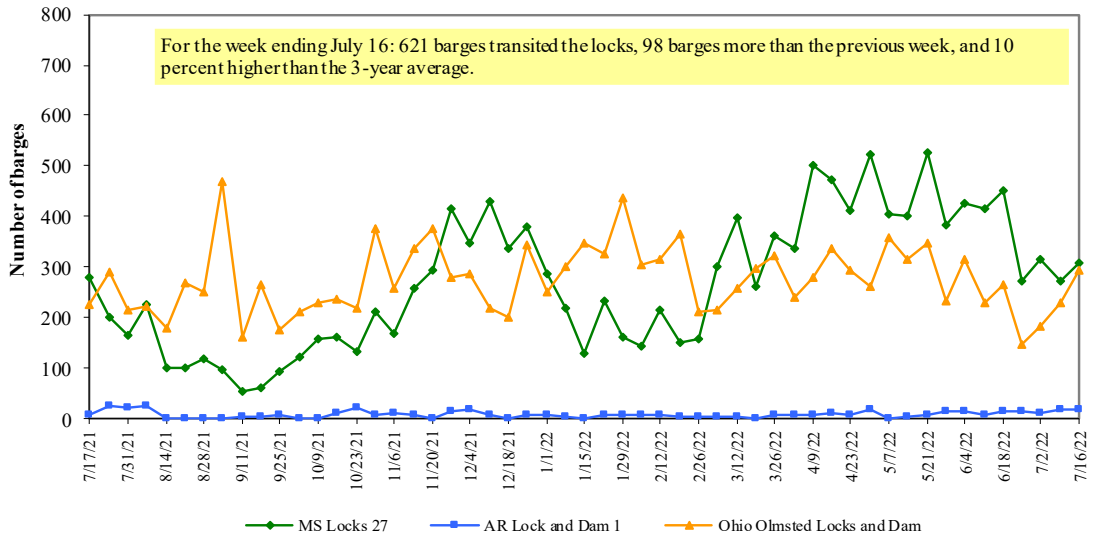
[2] As a percent of same period in 2021.

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

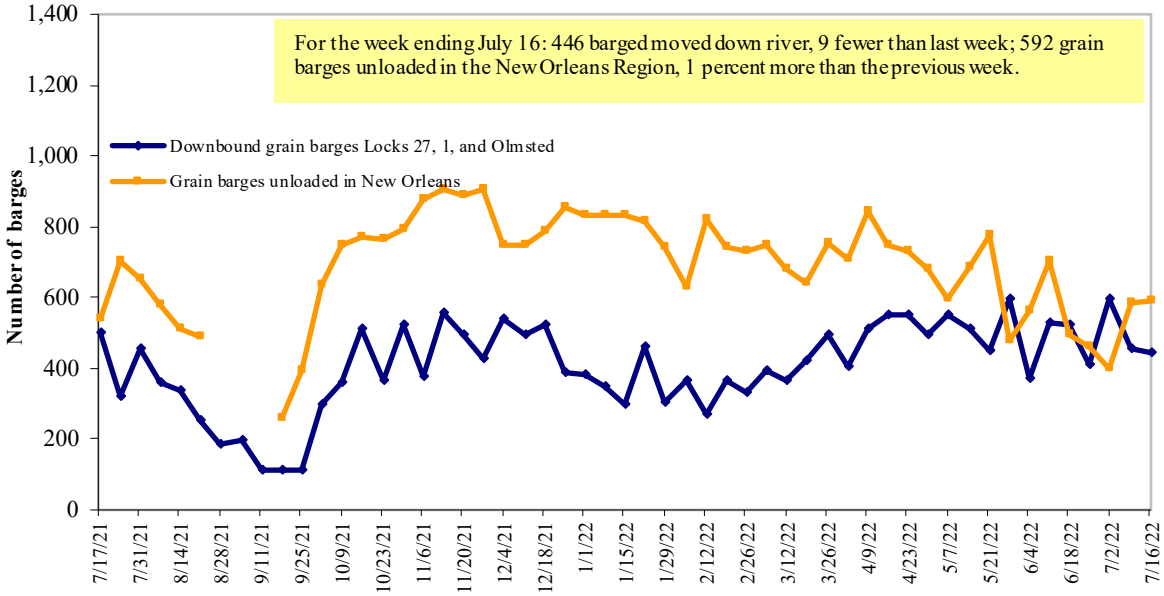


Source: U.S. Army Corps of Engineers.

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 7/18/2022 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	5.467	-0.133	2.155
	New England	5.693	-0.127	2.442
	Central Atlantic	5.740	-0.125	2.262
	Lower Atlantic	5.340	-0.139	2.129
II	Midwest	5.409	-0.133	2.145
III	Gulf Coast	5.083	-0.134	2.000
IV	Rocky Mountain	5.546	-0.128	1.912
V	West Coast	6.116	-0.169	2.187
	West Coast less California	5.768	-0.173	2.170
	California	6.516	-0.149	2.311
Total	United States	5.432	-0.136	2.088

[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.

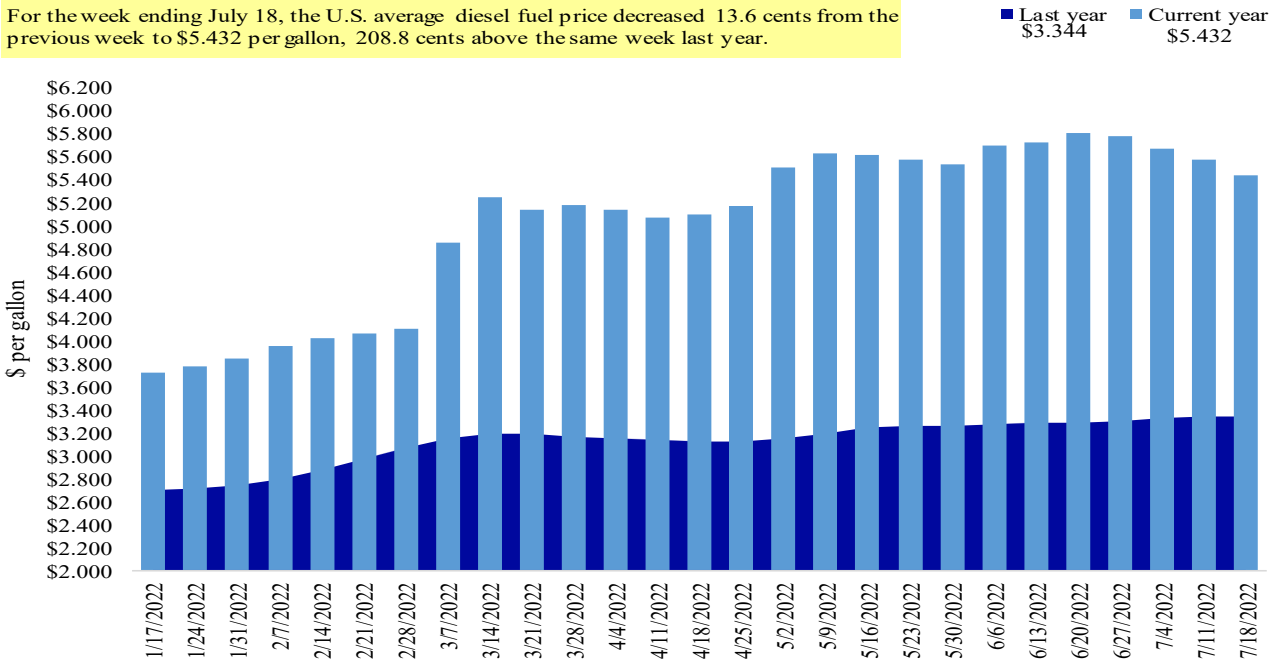
Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

NA = Not Available

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending July 18, the U.S. average diesel fuel price decreased 13.6 cents from the previous week to $5.432 per gallon, 208.8 cents above the same week last year.



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)

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances[1]									
7/7/2022	1,531	1,141	1,388	1,173	124	5,357	7,002	6,921	19,279
This week year ago	1,614	884	1,585	1,112	8	5,203	10,111	3,234	18,549
Cumulative exports-marketing year[2]									
2021/22 YTD	506	266	622	305	18	1,717	53,415	52,542	107,674
2020/21 YTD	739	231	577	324	42	1,913	59,748	58,692	120,352
YTD 2021/22 as % of 2020/21	68	0	108	94	0	90	89	90	89
Last 4 wks. as % of same period 2020/21*	85	115	81	86	1,183	91	84	248	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 07/07/2022	Total commitments[2]			% change	Exports[3]
	2022/23 next MY	2021/22 current MY	2020/21 last MY	current MY from last MY	3-yr. avg. 2019-21
		1,000 mt -			
Mexico	2081.9	16,592	15,095	10	14,817
Japan	730.9	9,873	10,859	(9)	11,082
China	2894.5	14,719	23,261	(37)	7,920
Columbia	160	4,359	3,883	12	4,491
Korea	0	1,474	3,526	0	3,302
Top 5 importers	**5,867**	**47,017**	**56,623**	**(17)**	**41,613**
Total U.S. corn export sales	**6,836**	**60,416**	**69,859**	**(14)**	**53,145**
% of projected exports	11%	97%	100%		
Change from prior week[2]	**348**	**59**	**139**		
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 (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 07/07/2022	Total commitments[2]			% change	Exports[3]
	2022/23	2021/22	2020/21	current MY	3-yr. avg.
	next MY	current MY	last MY	from last MY	2018-20
					- 1,000 mt -
China	7,855	30,360	35,827	(15)	21,666
Mexico	801	5,384	4,785	13	4,754
Egypt	228	4,086	2,777	47	3,093
Indonesia	9	1,656	2,318	(29)	2,325
Japan	138	2,422	2,326	4	2,275
Top 5 importers	**9,030**	**43,907**	**48,033**	**(9)**	**34,113**
Total U.S. soybean export sales	**13,852**	**59,463**	**61,926**	**(4)**	**50,758**
% of projected exports	24%	101%	101%		
change from prior week[2]	**114**	**(363)**	**22**		
Top 5 importers' share of U.S. soybean export sales	65%	74%	78%		**67%**
USDA forecast, July 2022	**58,174**	**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 7/07/2022	Total Commitments[2]		% change	Exports[3]
	2022/23	2021/22	current MY	3-yr. avg.
	current MY	last MY	from last MY	2018-20
		1,000 mt -		- 1,000 mt -
Mexico	1,203	1,152	4	3,388
Philippines	966	1,081	(11)	3,121
Japan	681	812	(16)	2,567
Korea	558	451	24	1,501
Nigeria	303	516	(41)	1,490
China	272	348	(22)	1,268
Taiwan	171	239	(28)	1,187
Indonesia	11	2	511	1,131
Thailand	125	124	1	768
Italy	122	54	125	681
Top 10 importers	**4,412**	**4,778**	(8)	**17,102**
Total U.S. wheat export sales	**7,074**	**7,116**	(1)	**24,617**
% of projected exports	32%	32%		
change from prior week[2]	**1,017**	**425**		
Top 10 importers' share of U.S. wheat export sales	62%	67%		69%
USDA forecast, July 2022	**21,798**	**21,907**	(0)	

[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 07/14/22	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	82	115	71	4,840	8,566	57	77	54	13,243
Corn	259	129	201	8,224	11,665	71	76	100	13,420
Soybeans	0	0	n/a	4,495	3,758	120	n/a	30	14,540
Total	**341**	**244**	**140**	**17,560**	**23,989**	**73**	**80**	**73**	**41,203**
Mississippi Gulf									
Wheat	33	127	26	2,227	1,563	142	73	89	3,202
Corn	583	609	96	22,326	27,039	83	99	118	38,498
Soybeans	274	280	98	12,294	10,573	116	299	94	27,159
Total	**889**	**1,016**	**88**	**36,847**	**39,175**	**94**	**120**	**107**	**68,858**
Texas Gulf									
Wheat	57	22	253	1,741	2,245	78	41	27	3,888
Corn	31	10	308	419	322	130	80	90	627
Soybeans	0	0	n/a	2	656	0	n/a	n/a	1,611
Total	**88**	**32**	**270**	**2,162**	**3,223**	**67**	**46**	**31**	**6,126**
Interior									
Wheat	25	61	40	1,545	1,563	99	90	127	2,973
Corn	176	147	120	5,137	5,301	97	107	107	10,157
Soybeans	99	79	125	3,823	3,447	111	129	97	6,525
Total	**300**	**288**	**104**	**10,505**	**10,311**	**102**	**109**	**107**	**19,656**
Great Lakes									
Wheat	0	0	n/a	111	253	44	0	0	536
Corn	0	18	0	118	39	304	249	748	145
Soybeans	0	13	0	234	34	693	475	91	592
Total	**0**	**31**	**0**	**463**	**326**	**142**	**141**	**61**	**1,273**
Atlantic									
Wheat	0	1	n/a	38	78	48	33	80	128
Corn	7	6	127	190	14	n/a	n/a	734	85
Soybeans	9	5	173	1,535	1,061	145	546	188	2,184
Total	**16**	**11**	**142**	**1,763**	**1,153**	**153**	**687**	**236**	**2,397**
U.S. total from ports*									
Wheat	196	326	60	10,501	14,268	74	69	58	23,969
Corn	1,055	918	115	36,415	44,379	82	94	112	62,932
Soybeans	382	377	101	22,383	19,529	115	242	89	52,612
Total	**1,633**	**1,622**	**101**	**69,299**	**78,177**	**89**	**104**	**91**	**139,512**

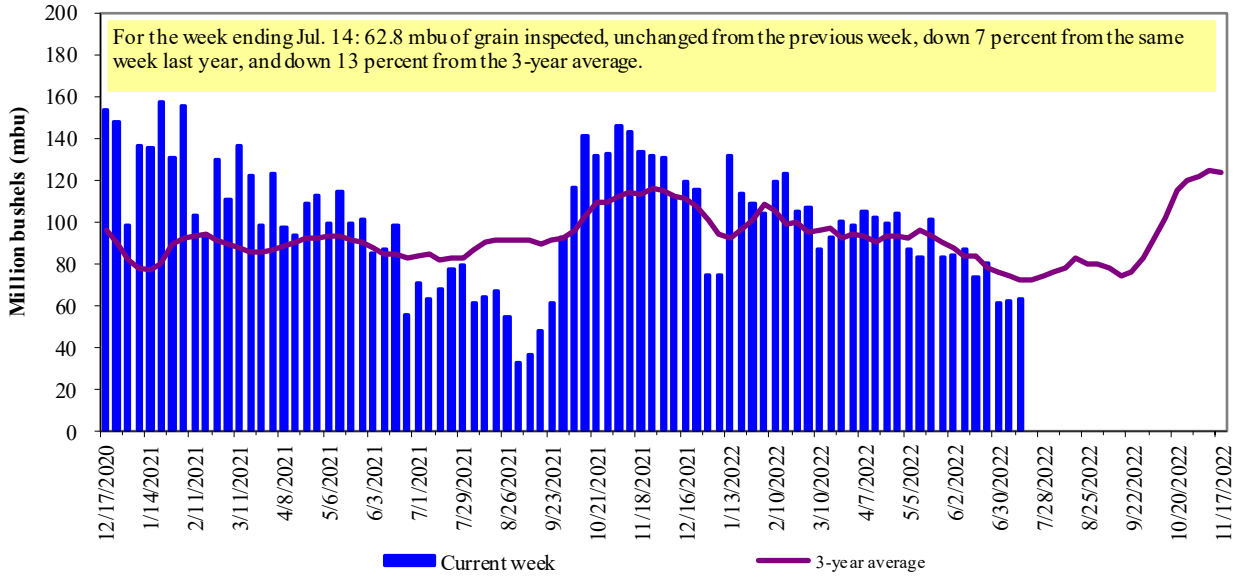
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

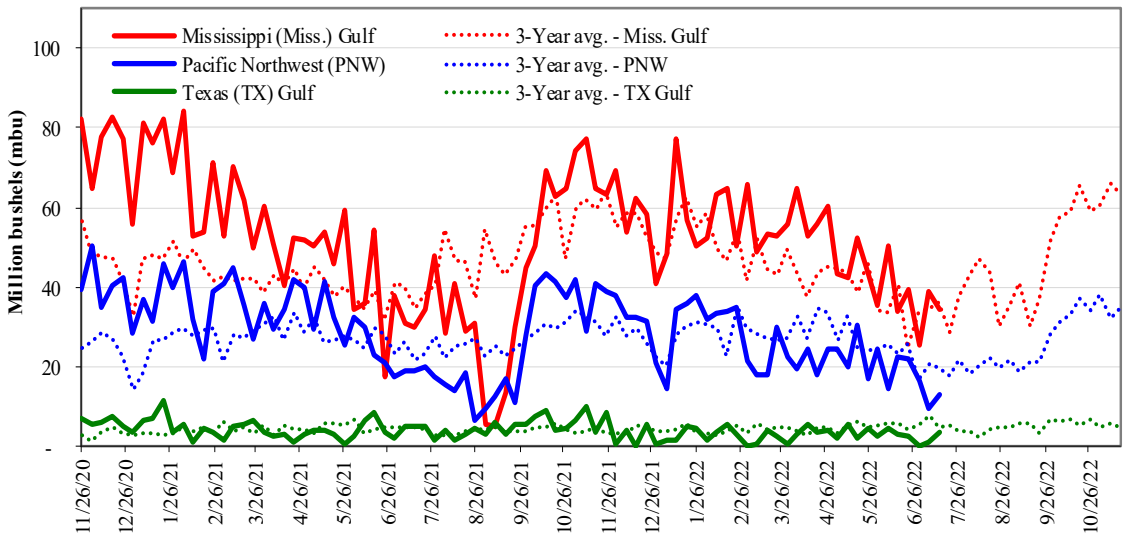


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 07/14/22 inspections (mbu):	
MS Gulf:	34.2
PNW:	13.2
TX Gulf:	3.3

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 12	up 170	down 7	up 42
Last Year (same wk):	up 15	down 34	up 8	down 30
3-yr avg. (4-wk. mov. Avg):	up 6	down 40	unchanged	down 36

Source: USDA, Federal Grain Inspection Service.

Table 17

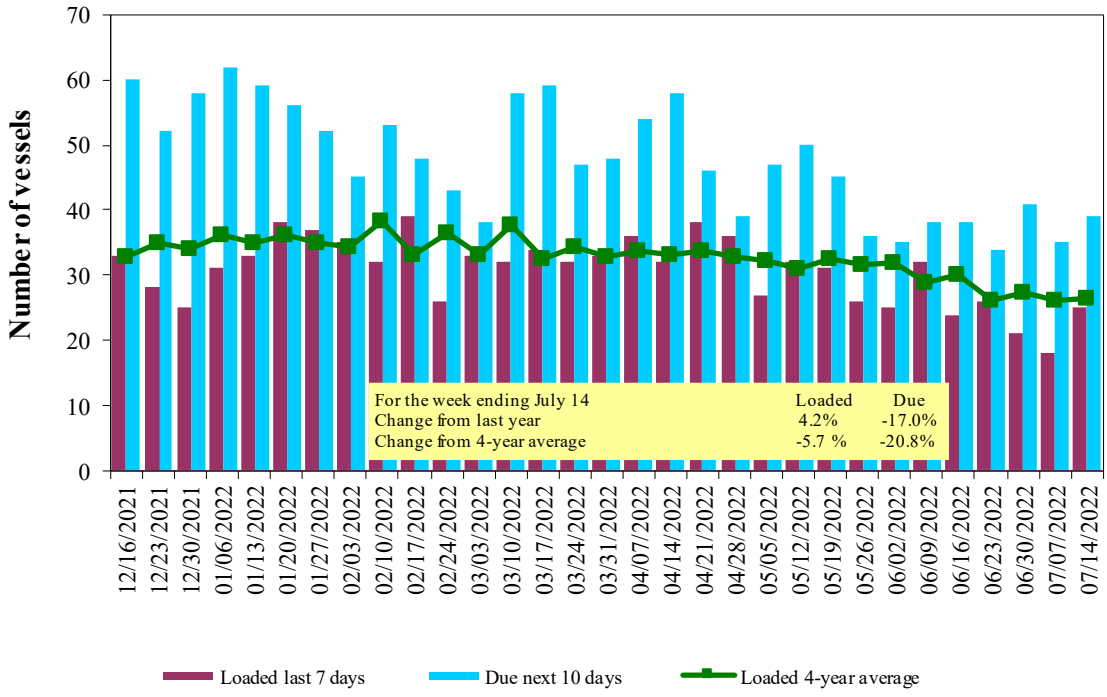
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
7/14/2022	23	25	39	9
7/7/2022	22	18	35	8
2021 range	(10…57)	(5...48)	(15...69)	(4…27)
2021 average	34	32	49	15

Source: USDA, Agricultural Marketing Service.

Figure 16

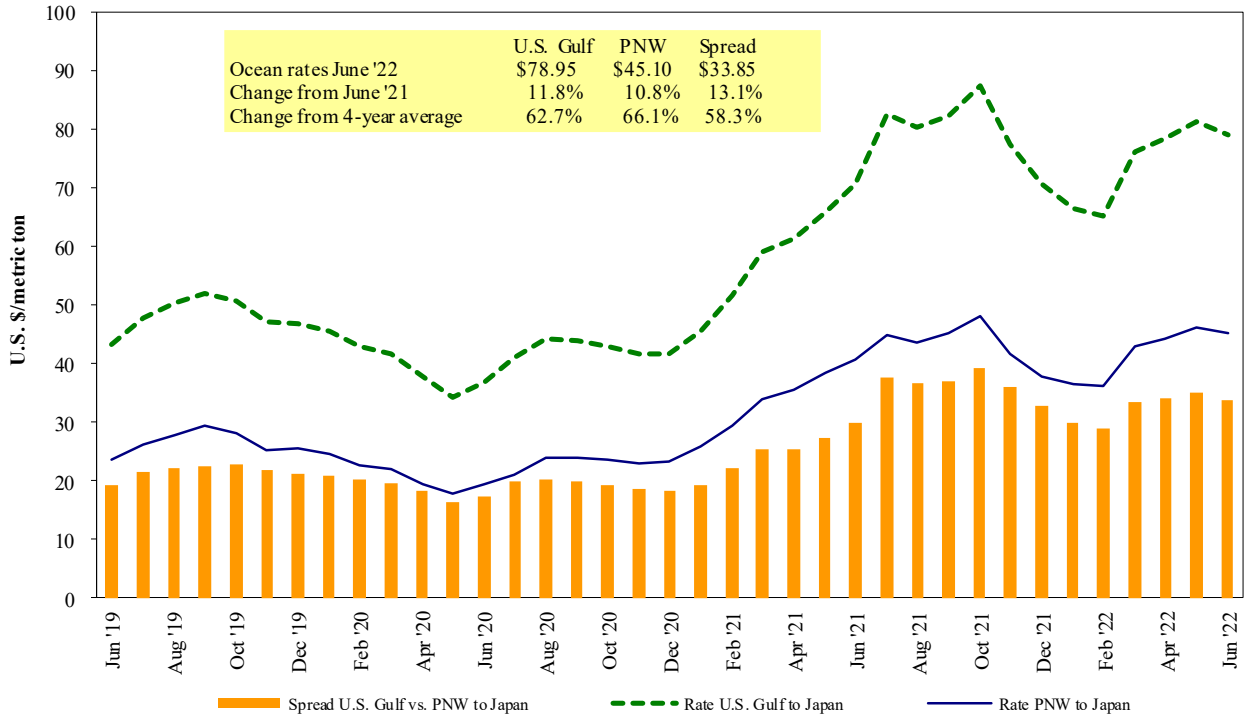
U.S. Gulf[1] vessel loading activity



[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 07/16/2022

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

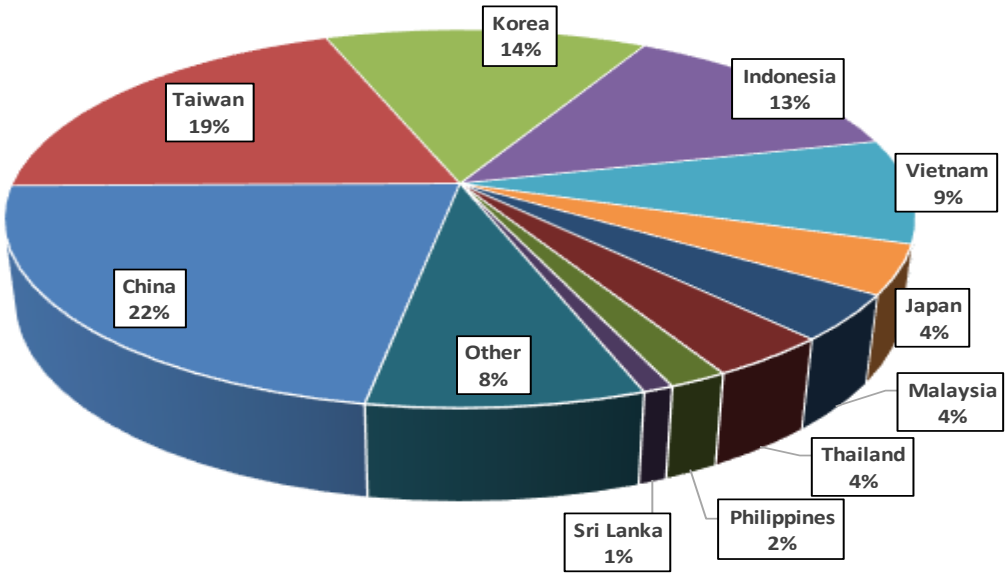
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

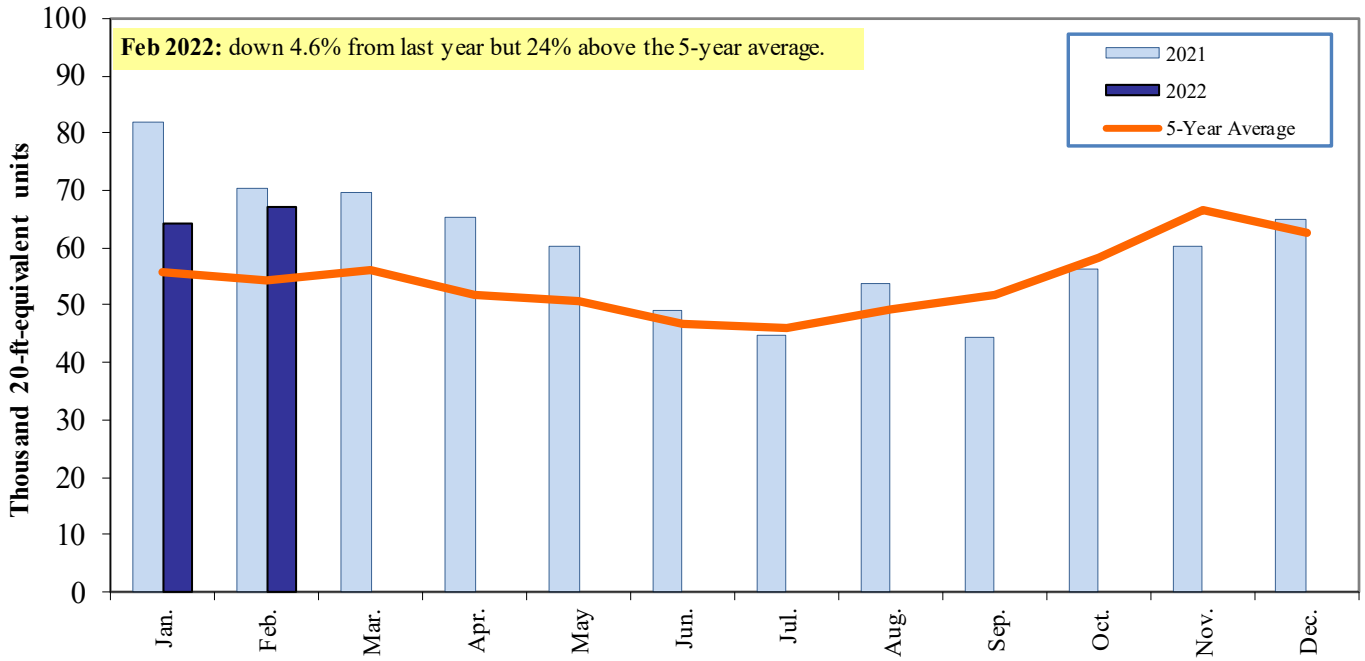
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Feb 2022



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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