USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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August 4, 2022

Contents

The next release is August 11, 2022

WEEKLY HIGHLIGHTS

Ukraine Sends First Black Sea Grain Shipment Since Outbreak of War

On August 1, Ukraine's first Black Sea grain ship since the war with Russia began carried 26,500 metric tons of corn destined to Tripoli, Lebanon. This shipment was the result of a July 23 agreement between Russia and Ukraine (mediated by the United Nations and Turkey) that enabled the resumption of grain exports out of key Ukrainian ports—Odesa, Chornomorsk, and Yuzhny. Once the first shipment passes inspection, dates and timing for additional shipments will be finalized, according to the Joint Coordination Centre (JCC), responsible for overseeing the export of Ukrainian grain. As a major exporter of grain, USDA estimates Ukraine exported 45 million metric tons (mmt) of wheat and coarse grains in marketing year 2020/21. These exports accounted for 69 percent of the country's total production. In MY 2022/23, USDA projects Ukraine will export 20.8 mmt of wheat and coarse grains—41 percent of the country's total production. In a July 23 video message, the U.S. Agency for International Development indicated roughly 20 mmt of wheat and corn have been blocked from leaving the port of Odesa.

John Day Lock and Dam Close for Repairs

On July 25, technicians of the U.S. Army Corps of Engineers (USACE) closed the John Day Lock and Dam after finding damage to a lower guide wheel. As a result, traffic has slowed on that portion of the Columbia River, in USACE's Portland (OR) District. USACE is working to restore the lock to full service as quickly as possible. From 2017 to 2020, 23.9 million to 32.8 million tons of grain shipments originated in or moved through the entire Columbia River system annually. Of that total, 4.4 million to 5.0 million tons originated in or moved through the Portland District.

Panama Canal Tentatively Schedules Locks' Closure To Perform Maintenance Work

On August 11, 17, 18, and 23, the Panama Canal Authority is closing the west lane of the Canal's Gatun Panamax Locks for 4 hours per day to perform scheduled maintenance work. During the outages, the locks' daily transit capacity is estimated at 31-33 vessels—down from the normal capacity of 34-36 vessels. On August 28, the west lane of the Gatun Locks is scheduled to close for 5 hours, reducing capacity slightly, to 30-32 vessel hours per day. No major delays are anticipated. On September 1, the same locks are scheduled for 8 days of major outage, reducing the capacity to 21-23 vessel hours per day. The locks' exact transit capacity depends on vessel mix, transit restrictions, and other factors. The majority of U.S. grain destined to Asia transits the canal.

Snapshots by Sector

Export Sales

For the week ending July 21, **unshipped balances** of wheat, corn, and soybeans totaled 17.17 million metric tons (mmt), up 9 percent from the same time last year and down 6 percent from the previous week. Net **corn export sales** were 0.150 mmt, up significantly from the previous week. Net **soybean export sales** were −0.059 mmt, down significantly from the previous week. Net weekly **wheat export sales** for marketing year 2022/23 were 0.412 mmt, down 19 percent from last week.

Rail

U.S. Class I railroads originated 20,709 **grain carloads** during the week ending July 23. This was a 10-percent increase from the previous week, unchanged from last year, and 3 percent fewer than the 3-year average.

Average August shuttle **secondary railcar** bids/offers (per car) were $100 above tariff for the week ending July 28. This was $11 less than last week and $43 more than this week last year.

Barge

For the week ending July 30, **barged grain movements** totaled 731,275 tons. This was 29.5 percent higher than the previous week and 12.3 percent higher than the same period last year.

For the week ending July 30, 459 grain barges **moved down river**—88 more barges than last week. There were 750 grain barges **unloaded** in the New Orleans region, 47 percent more than last week.

Ocean

For the week ending July 28, 25 **oceangoing grain vessels** were loaded in the Gulf—31 percent fewer than the same period last year. Within the next 10 days (starting July 29), 43 vessels were expected to be loaded—17 percent fewer than the same period last year.

As of July 28, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $68.50. This was 1 percent less than the previous week. The rate from the Pacific Northwest to Japan was $40.50 per mt, unchanged from the previous week.

Fuel

For the week ending August 1, the U.S. average **diesel fuel price** decreased 13.0 cents from the previous week to $5.138 per gallon, 177.1 cents above the same week last year.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 4, 2022.
Web: http://dx.doi.org/10.9752/TS056.08-04-2022

Feature Article/Calendar

Ocean Shipping Reform Act of 2022: What It Means for Agricultural Shippers

For more than 2 years, agricultural exporters have faced increased costs and transportation challenges while shipping their products in containers. During the COVID-19 pandemic, extreme port and intermodal congestion posed many hurdles to exporters. From January 2020 to September 2021, shipping rates for a 40-foot container from the U.S. West Coast rose from $840 to $1,710. In addition to very high freight costs, pandemic-spawned congestion led to unpredictable sailings and denial of U.S. cargo by ocean carriers.

Enacted June 16, 2022, the bipartisan Ocean Shipping Reform Act of 2022 (OSRA) aims to address these challenges by giving the Federal Maritime Commission (FMC) the authority to regulate ocean carrier practices affecting shippers. OSRA is the first major revision of U.S. maritime regulatory statutes since 1998.

This article discusses the key features of OSRA related to agricultural exporters' concerns.

Addressing Unfair Carrier Practices

Detention and demurrage. Between 2020 and 2021, at the 20 biggest ports in the world, the average demurrage and detention charges rose 104 percent. These charges are assessed by carriers, marine terminal operators, shippers, and ocean transportation intermediaries. The charges are ostensibly intended to incentivize the efficient use of containers, equipment, and yard space. However, shippers have argued they are often billed detention and demurrage charges even when the delays are not their fault.

OSRA attempts to address unfair practices in carriers' assessment of these charges. First, with every detention or demurrage invoice, OSRA requires the carrier to justify the charge and provide the following information: container number(s); the date the container was made available; where it was made available; the earliest date the exporter was allowed to return the container; free days allowed to pick up and return the container; start and end dates of free time; the applicable rate; the applicable detention and demurrage rule on which daily rate is based; total amount due; and information on how to question or contest the charge. The carrier must also include statements that the charge complies with FMC's rules and that the carrier's own performance did not contribute to the delays. Without this information, the shipper is not obligated to pay the charge. If FMC determines that the invoice was inaccurate, penalties or refunds will be applied. OSRA's rule on inaccurate invoices seeks to further clarify what constitutes "reasonable" rules and practices for assessing detention and demurrage charges. The rule also clarifies which parties may be appropriately billed for any demurrage, detention, or other similar charges per container.

Currently, FMC has established an interim process for submitting complaints about carrier charges that shippers believe may not comply with OSRA. Once sufficient information is received, FMC will promptly initiate an investigation. Ultimately, the investigation could result in a civil penalty and an order to refund charges paid. Already, FMC has informed carriers they must immediately comply with detention and demurrage billing practices.

Unfair/discriminatory carrier methods. Between July and December of 2020, carriers rejected at least $1.3 billion in U.S. agricultural exports, giving rise to complaints by shippers. OSRA's rule on unfair methods clarifies that carriers cannot "unreasonably refuse cargo space accommodations when available, or resort to other unfair or unjustly discriminatory methods." Although preexisting law prohibited unjust or unreasonable preferences or advantages by carriers, the law's vague language resulted in costly disputes over whether perceived preferences could be justified. OSRA required FMC to initiate a rulemaking to define unfair or unjustly discriminatory methods used by carriers against shippers. FMC will complete the final rule within 1 year of OSRA's enactment.

Refusal to deal. West Coast exporters have reported their agricultural exports sat at ports while ocean carriers returned to Asia with empty containers. OSRA's "refusal to deal" provision addresses agricultural shippers' complaints of carriers refusing their products because they are unprofitable to their operations.[1] In consultation with the U.S. Coast Guard, FMC will initiate a rulemaking defining unreasonable refusal to deal—i.e., refusal to negotiate about vessel space. FMC will issue a final rule within 6 months of OSRA's enactment.

[1] OSRA also adds to preexisting statutory prohibitions against retaliation. A common carrier, marine terminal operator, or ocean transportation intermediary may not retaliate against a shipper, an agent of a shipper, an ocean transportation intermediary, or a motor carrier by refusing (or threatening to refuse) otherwise available cargo space accommodation. The carrier may also not resort to any other unfair or unjustly discriminatory action to retaliate against a shipper for patronizing another carrier, for filing a complaint with the FMC, or for any other reason.

Shipping exchange registry. Within 3 years of OSRA's enactment, FMC must establish and administer a shipping exchange registry, which would allow private shipping exchanges to operate in the United States under FMC regulation. These exchanges serve ocean carriers and shippers by mediating contract disputes.

Addressing Logistics—Shortages, Port Congestion, Inefficiencies

Chassis pool best practices. Chassis shortage has been an ongoing issue for agricultural exporters for the last 2 years, and exporters have stressed the need for increased chassis supply at seaports and inland rail terminals. The OSRA rule on chassis best practices aims to improve chassis management by authorizing the Department of Transportation's (DOT) Bureau of Transportation Statistics to collect data on dwell times for chassis and conduct a National Academy of Sciences study on best practices of chassis management.[2]

Emergency authority to address supply chain congestion. Over the last 2 years, agricultural exporters have lost 22 percent of sales because of delays in ocean shipping. Port congestion has led to increased dwell times and detention and demurrage charges. OSRA gives FMC temporary emergency authority to collect data at times of emergency congestion, among other emergencies. To ensure efficient transportation, loading, and unloading of cargo, an FMC emergency order could require ocean carriers or marine terminals to share information on cargo throughput and availability. FMC could order such information to be made available to shippers, railroads, and motor carriers. Within 60 days of OSRA's enactment, FMC will seek public comment on whether supply chain congestion poses enough of an emergency to substantially damage the competitiveness of U.S. ocean transportation. The public will also be asked to comment on whether a temporary emergency order would alleviate the situation.

Using inland ports to store and transfer containers. Supply chain disruptions resulting from a lack of container storage space have led some agricultural exporters to find alternative ports to transport their products. Within 90 days of OSRA's enactment, DOT, in consultation with the U.S. Maritime Administration and FMC, will convene a meeting to discuss strategies for identifying Federal and nonfederal land, including inland ports, for storing and transferring cargo containers to alleviate port congestion. The discussion will include representatives of ports, export terminals, ocean carriers, railroads, trucking companies, and port labor. Sidestepping the challenge of finding container storage space near coastal ports, the rule focuses on finding alternative storage space farther inland.

Addressing Gaps in Information Sharing and Technology

Dwell time statistics. "Street dwell time" for chassis refers to the quantity of time in which the equipment is used outside the terminal. Delays in street dwell times are linked to shipper detention costs and are a major factor in causing port and supply chain congestion. OSRA gives FMC the authority to collect and publish statistics related to street dwell times of chassis used in intermodal transportation at the top 25 ports, including inland ports. The following entities must submit street-dwell-time data to FMC for publication: each port, marine terminal operator, and chassis owner or provider with a fleet of over 50 chassis that supplies chassis for a fee.

Adoption of technology at U.S. ports. Improved technology to automate a growing number of functions at ports has been a major strategy of the freight industry to address rising demand for container capacity at ports. Within 1 year of OSRA's enactment, the Government Accountability Office will submit a report to Congress describing the adoption of technology at U.S. ports.[3]

Looking Ahead

On July 28, FMC reported it is making significant progress on fulfilling OSRA's requirements. FMC's most urgent goal is to initiate and complete a rulemaking on unreasonable "refusal to deal"—i.e., refusal to negotiate on vessel space accommodations. In the immediate future, FMC expects to publish a notice of proposed rulemaking, seeking public comment on the issue. As mandated by OSRA, FMC said it is on track to have a final rule in effect by December 2022. In addition, on August 2, FMC invited public comment (due within 60 days) on a proposed plan for gathering import and export information from carriers. *Kranti.Mulik@usda.gov*

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[2] No later than April 1, 2023, FMC must enter an agreement with the Transportation Research Board (TRB), a division of the National Academies. Under the agreement, TRB will conduct a study and develop best practices for stakeholders that use chassis pools to optimize supply chain efficiency. Such stakeholders include on-terminal or near-terminal chassis pools that provide service to marine terminal operators, motor carriers, and railroads, among others.

[3] This report will cover the technical capabilities of U.S. ports compared to foreign ports, as well as assessments of the following issues: whether the adoption of technology at U.S. ports could lower the costs of cargo handling; what regulatory and other barriers exist to adopting technology at U.S. ports; and what technology ports currently use for managing their workforce.

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
08/03/22	345	324	238	252	306	287
07/27/22	354	324	238	275	309	287

[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	7/29/2022	7/22/2022
Corn	IL–Gulf	-1.10	-0.35
Corn	NE–Gulf	-0.69	-0.06
Soybean	IA–Gulf	-2.76	-1.81
HRW	KS–Gulf	-2.32	-2.32
HRS	ND–Portland	-2.41	-2.44

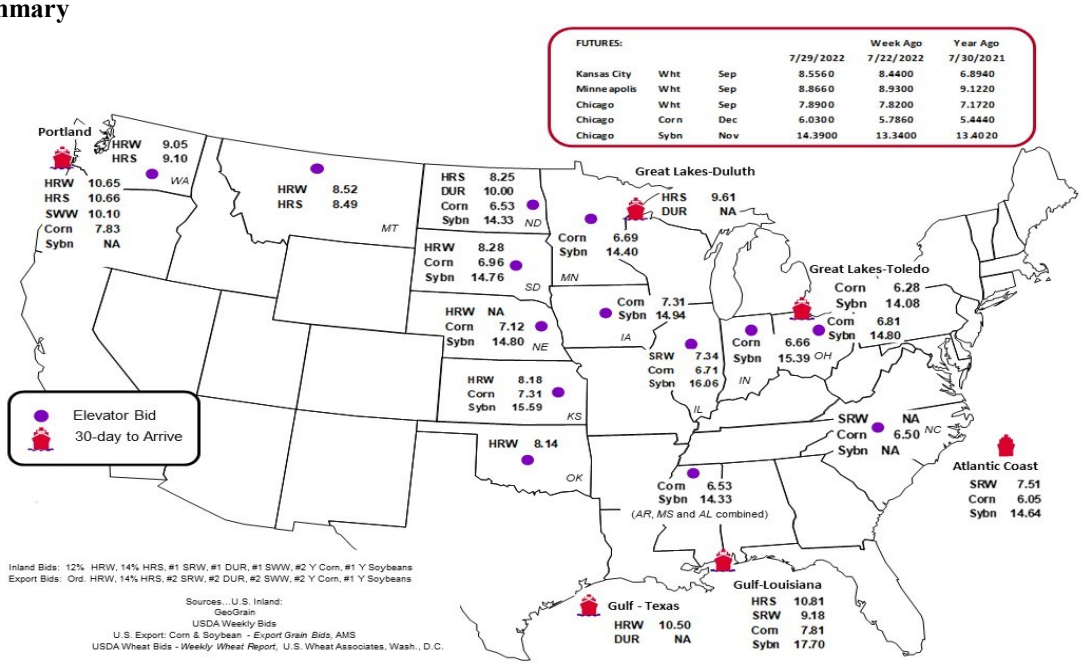
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
7/27/2022[p]	859	22	3,227	46	4,154	7/23/2022	2,297
7/20/2022[r]	566	1,029	2,421	266	4,282	7/16/2022	2,777
2022 YTD[r]	38,990	25,747	158,210	14,791	237,738	2022 YTD	80,800
2021 YTD[r]	35,105	41,848	175,138	9,887	261,978	2021 YTD	79,738
2022 YTD as % of 2021 YTD	111	62	90	150	91	% of 2021 YTD	101
Last 4 weeks as % of 2021[2]	543	56	72	-	85	Last 4wks. % 2021	104
Last 4 weeks as % of 4-year avg.[2]	166	69	57	69	67	Last 4wks. % 4 yr.	99
Total 2021	54,982	69,213	311,407	22,567	458,169	Total 2021	147,859
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	128,714

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

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

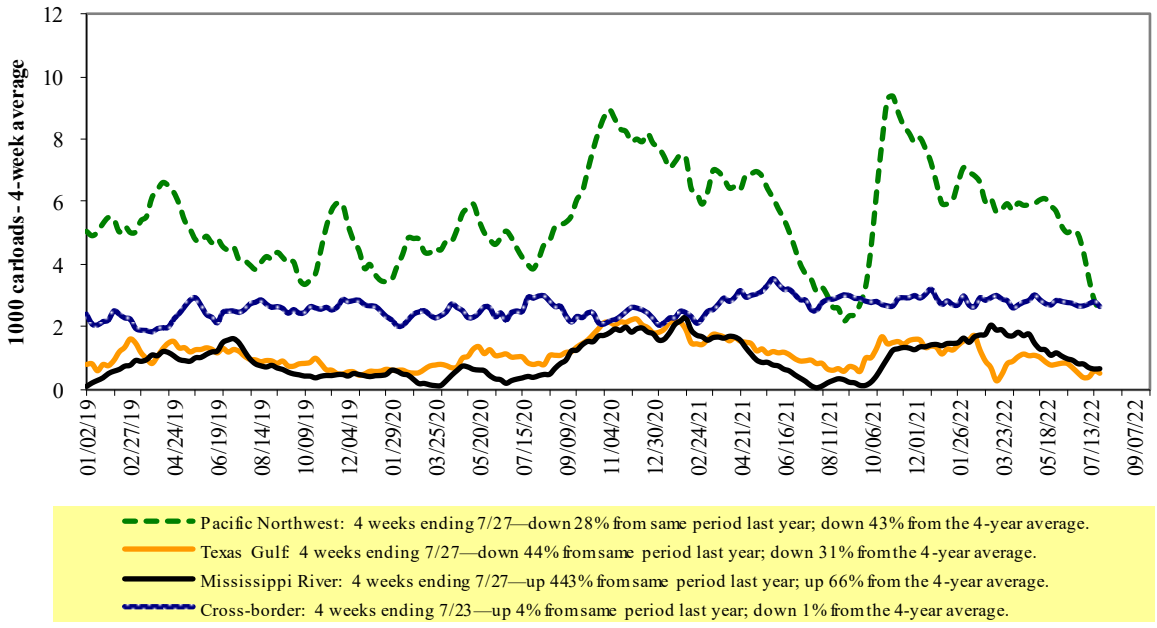
[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

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

Source: USDA, Agricultural Marketing Service.

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

Figure 2
Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

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

For the week ending:	East		West			U.S. total	Canada	
7/23/2022	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,019	2,701	9,696	1,277	5,016	20,709	3,729	3,315
This week last year	1,565	2,910	9,610	1,258	5,403	20,746	2,425	4,891
2022 YTD	52,382	70,813	323,328	35,783	165,829	648,135	102,222	100,676
2021 YTD	54,855	74,650	355,690	32,282	183,341	700,818	125,356	149,459
2022 YTD as % of 2021 YTD	95	95	91	111	90	92	82	67
Last 4 weeks as % of 2021*	106	114	96	108	101	101	161	74
Last 4 weeks as % of 3-yr. avg.**	105	103	87	106	98	94	109	65
Total 2021	93,935	120,894	609,890	64,818	318,002	1,207,539	210,139	242,533

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

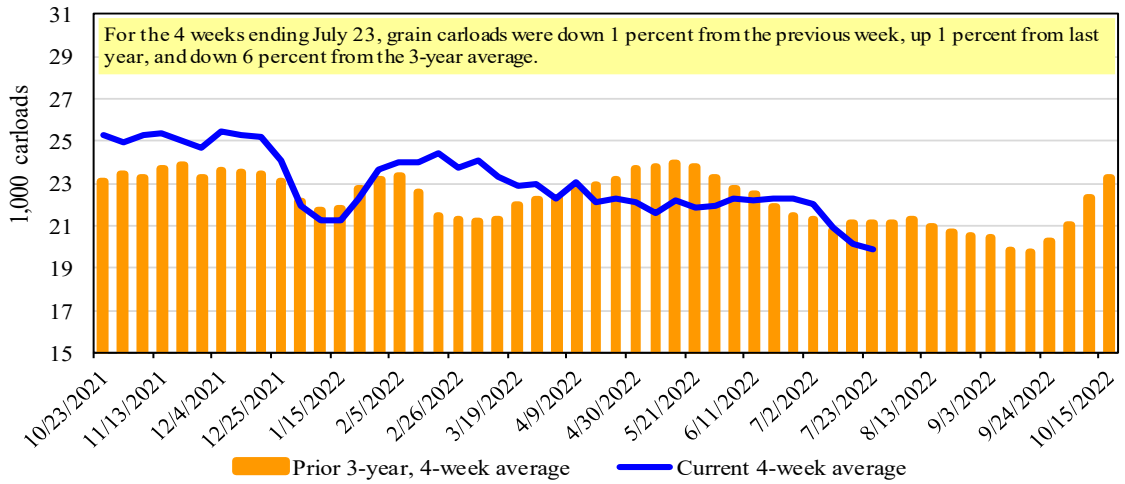
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
7/28/2022		Aug-22	Aug-21	Sep-22	Sep-21	Oct-22	Oct-21	Nov-22	Nov-21
BNSF[3]	COT grain units	no bids	0	0	0	163	0	117	0
	COT grain single-car	0	0	159	0	236	0	254	0
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a

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

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

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

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

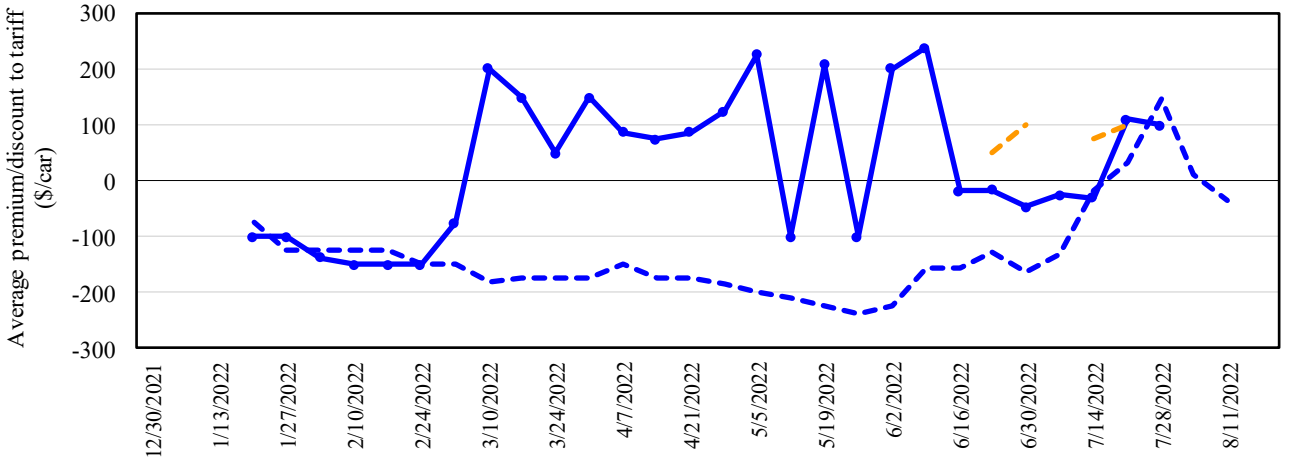
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

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

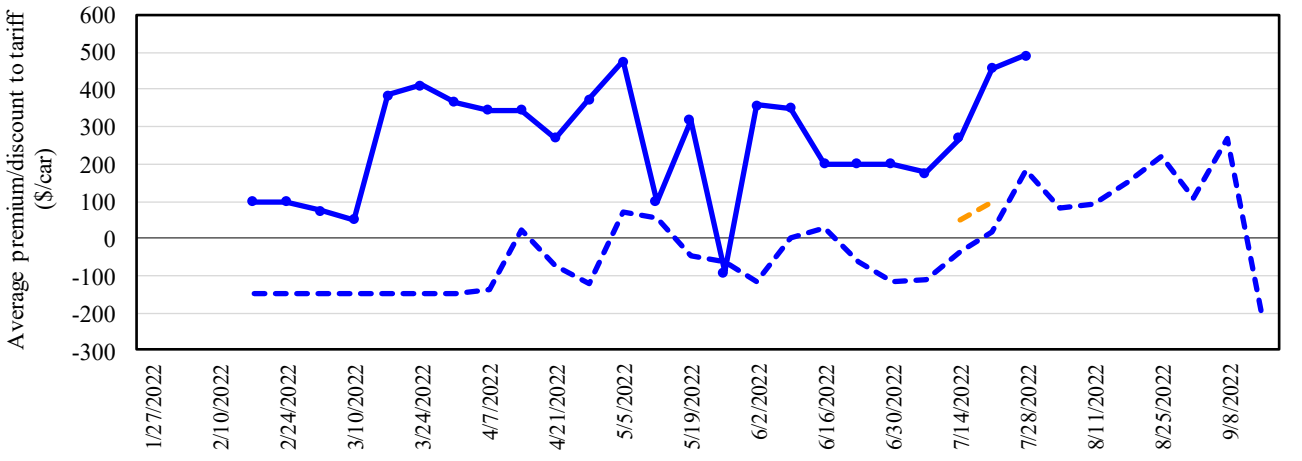


7/28/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$213	$413

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers fell $11 this week and are $138 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 September 2022



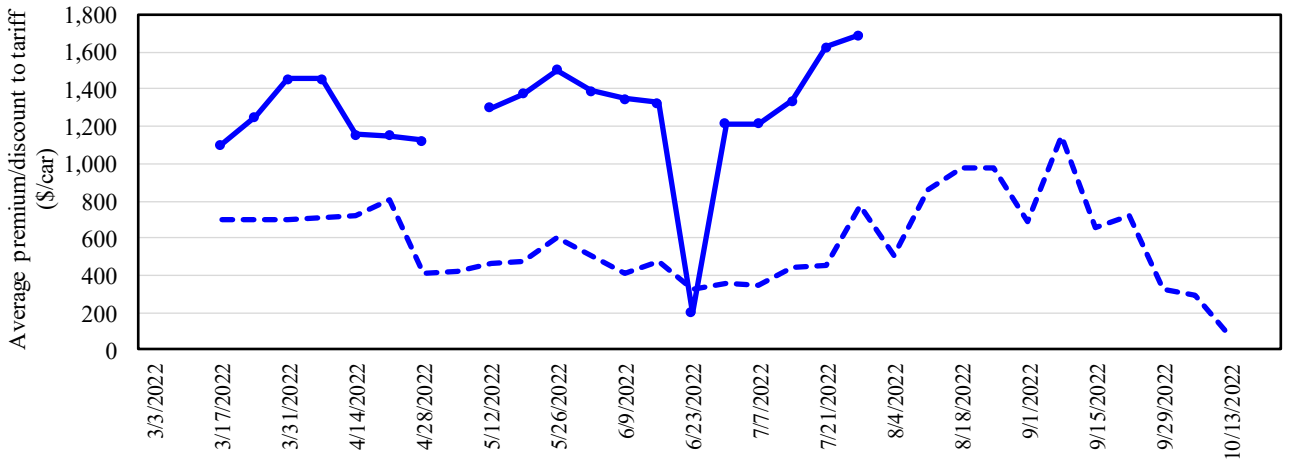
7/28/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$431	$550

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $34 this week and are at 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 October 2022



7/28/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$1,775	$1,600

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $63 this week and are at 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					
	7/28/2022	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 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**	**(213)**	**431**	**1,775**	**n/a**	**600**	**n/a**
	Change from last week	(7)	152	75	n/a	0	n/a
	Change from same week 2021	22	281	1,113	n/a	n/a	n/a
	UP-Pool	**413**	**550**	**1,600**	**n/a**	**n/a**	**n/a**
	Change from last week	(15)	(83)	50	n/a	n/a	n/a
	Change from same week 2021	65	519	878	n/a	n/a	n/a

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

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

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

August 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	$374	$40.41	$1.10	7
	Grand Forks, ND	Duluth-Superior, MN	$3,858	$0	$38.31	$1.04	5
	Wichita, KS	Los Angeles, CA	$7,490	$0	$74.38	$2.02	5
	Wichita, KS	New Orleans, LA	$4,600	$659	$52.22	$1.42	11
	Sioux Falls, SD	Galveston-Houston, TX	$7,226	$0	$71.76	$1.95	5
	Colby, KS	Galveston-Houston, TX	$4,850	$722	$55.33	$1.51	11
	Amarillo, TX	Los Angeles, CA	$5,121	$1,004	$60.83	$1.66	12
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$744	$47.11	$1.20	15
	Toledo, OH	Raleigh, NC	$8,130	$808	$88.76	$2.25	14
	Des Moines, IA	Davenport, IA	$2,505	$158	$26.44	$0.67	6
	Indianapolis, IN	Atlanta, GA	$6,227	$607	$67.87	$1.72	14
	Indianapolis, IN	Knoxville, TN	$5,247	$393	$56.01	$1.42	12
	Des Moines, IA	Little Rock, AR	$4,000	$463	$44.32	$1.13	10
	Des Moines, IA	Los Angeles, CA	$5,880	$1,349	$71.79	$1.82	16
Soybeans	Minneapolis, MN	New Orleans, LA	$4,431	$1,169	$55.61	$1.51	44
	Toledo, OH	Huntsville, AL	$6,714	$576	$72.40	$1.97	11
	Indianapolis, IN	Raleigh, NC	$7,422	$820	$81.84	$2.23	16
	Indianapolis, IN	Huntsville, AL	$5,367	$389	$57.16	$1.56	10
	Champaign-Urbana, IL	New Orleans, LA	$4,665	$744	$53.72	$1.46	11
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,393	$0	$43.62	$1.19	5
	Wichita, KS	Galveston-Houston, TX	$4,611	$0	$45.79	$1.25	9
	Chicago, IL	Albany, NY	$6,670	$763	$73.82	$2.01	17
	Grand Forks, ND	Portland, OR	$6,051	$0	$60.09	$1.64	3
	Grand Forks, ND	Galveston-Houston, TX	$5,399	$0	$53.61	$1.46	-6
	Colby, KS	Portland, OR	$5,923	$1,183	$70.57	$1.92	11
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	$744	$46.32	$1.18	15
	Lincoln, NE	Galveston-Houston, TX	$4,080	$0	$40.52	$1.03	5
	Des Moines, IA	Amarillo, TX	$4,420	$582	$49.68	$1.26	11
	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	$858	$57.13	$1.55	12
	Toledo, OH	Huntsville, AL	$4,954	$576	$54.92	$1.49	12
	Grand Island, NE	Portland, OR	$5,280	$1,211	$64.46	$1.75	15

[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]	Tariff rate plus fuel surcharge per: 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.

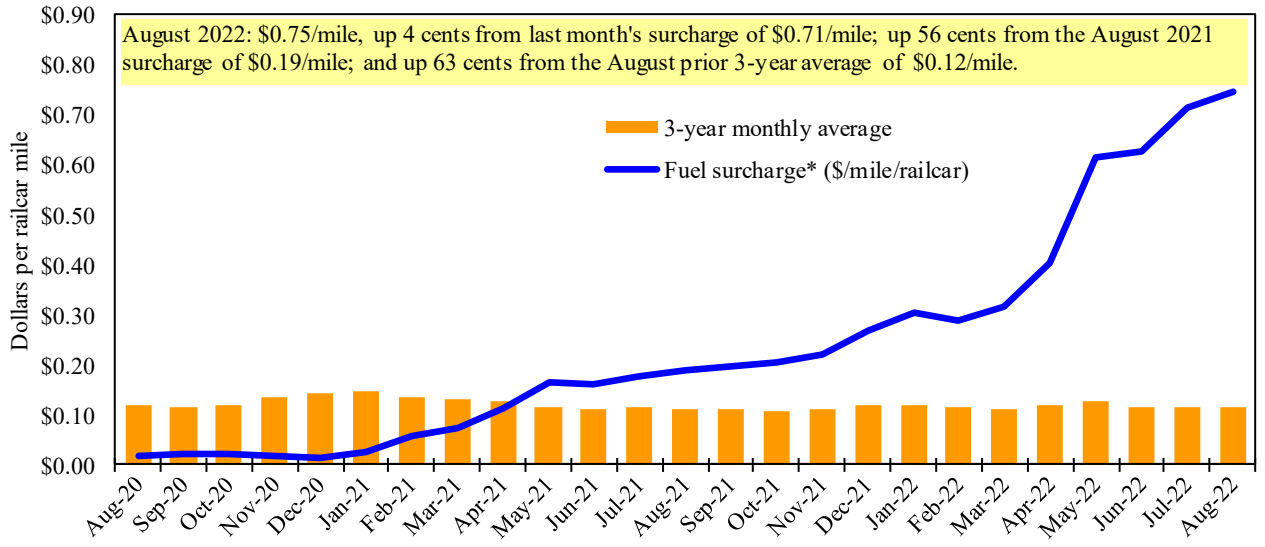
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[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.

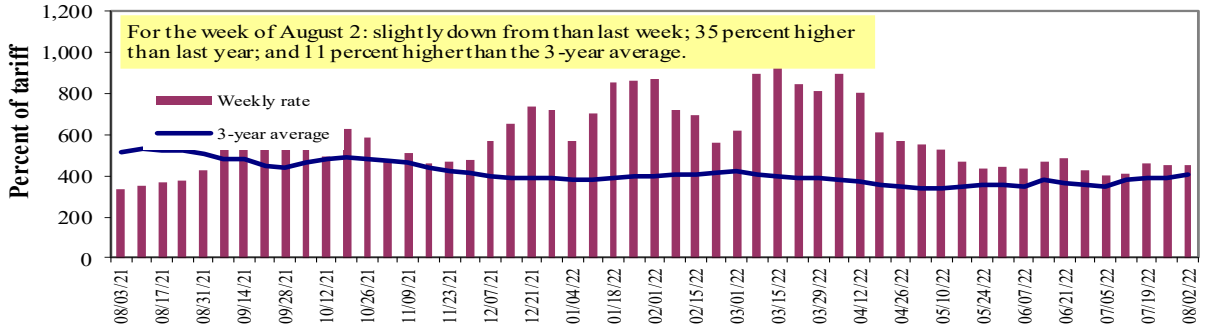
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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

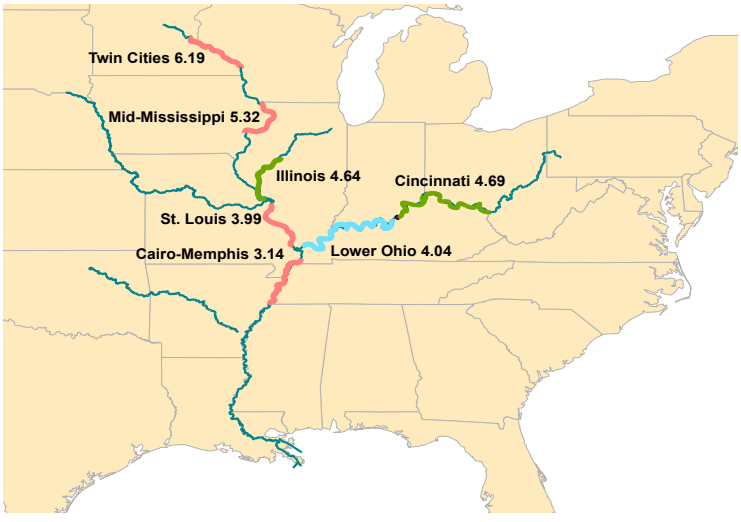
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	8/2/2022	586	498	454	401	469	469	388
	7/26/2022	587	511	455	401	462	462	388
$/ton	8/2/2022	36.27	26.49	21.07	16.00	22.00	18.95	12.18
	7/26/2022	36.34	27.19	21.11	16.00	21.67	18.66	12.18
Current week % change from the same week:								
	Last year	45	40	35	57	86	86	55
	3-year avg. [2]	34	24	-	38	86	86	51
Rate[1]	September	781	729	721	712	727	727	706
	November	754	728	707	622	696	696	579

[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

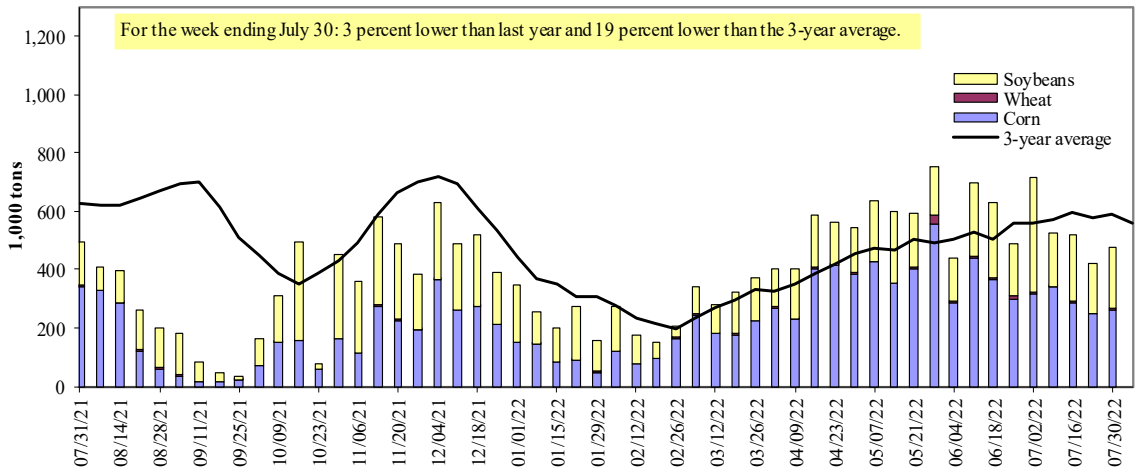
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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.

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Table 10

Barge grain movements (1,000 tons)

For the week ending 07/30/2022	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	206	0	169	0	375
Winfield, MO (L25)	213	0	179	0	392
Alton, IL (L26)	262	2	206	0	470
Granite City, IL (L27)	263	2	214	0	478
Illinois River (La Grange)	101	0	54	0	155
Ohio River (Olmsted)	126	37	51	0	214
Arkansas River (L1)	0	32	7	0	39
Weekly total - 2022	388	71	272	0	731
Weekly total - 2021	402	60	184	5	651
2022 YTD[1]	12,197	1,139	7,414	171	20,921
2021 YTD[1]	17,814	961	5,100	203	24,078
2022 as % of 2021 YTD	68	118	145	85	87
Last 4 weeks as % of 2021[2]	84	103	165	224	105
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.

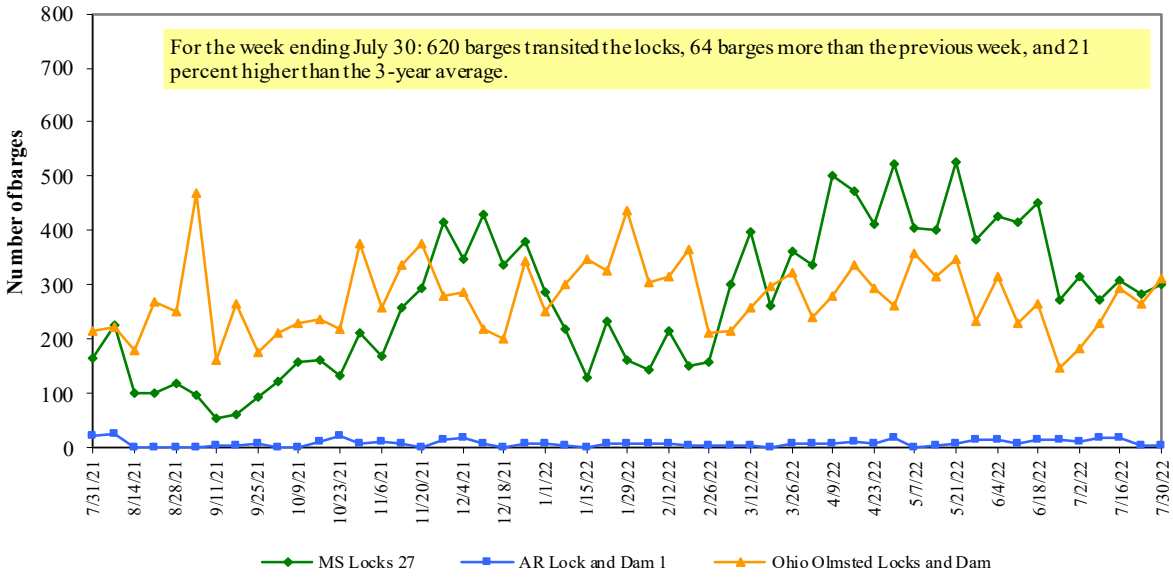
[2] As a percent of same period in 2021.

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

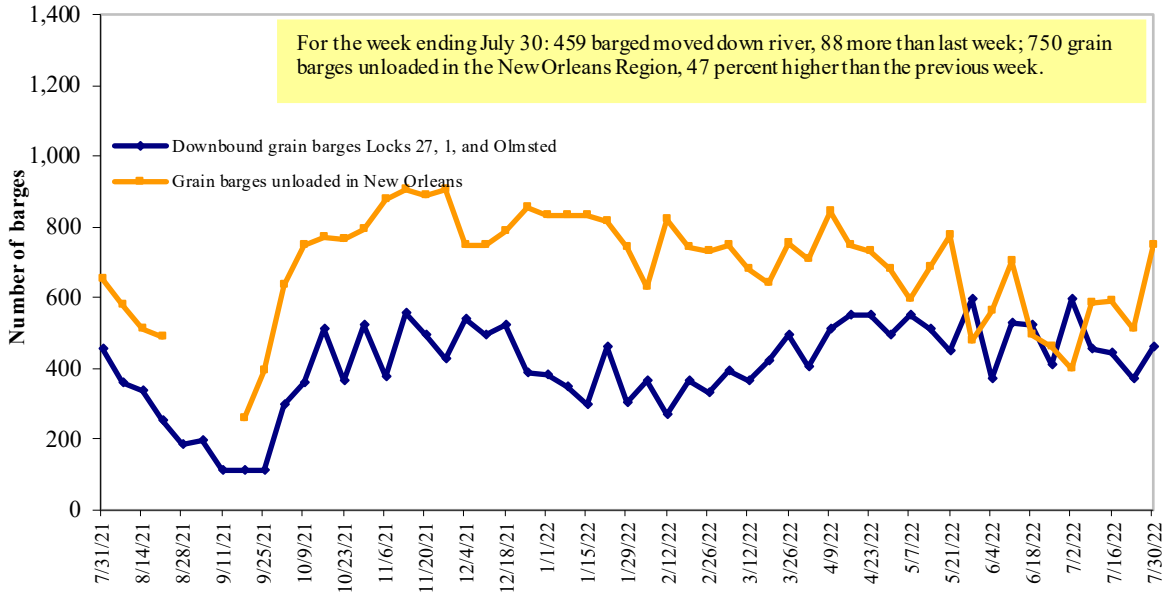


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-highway diesel prices, week ending 8/1/2022 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	5.181	-0.118	1.849
	New England	5.463	-0.076	2.208
	Central Atlantic	5.518	-0.102	2.025
	Lower Atlantic	5.027	-0.127	1.789
II	Midwest	5.108	-0.133	1.830
III	Gulf Coast	4.801	-0.110	1.704
IV	Rocky Mountain	5.181	-0.208	1.515
V	West Coast	5.803	-0.179	1.810
	West Coast less California	5.399	-0.216	1.738
	California	6.266	-0.123	1.995
Total	United States	5.138	-0.130	1.771

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

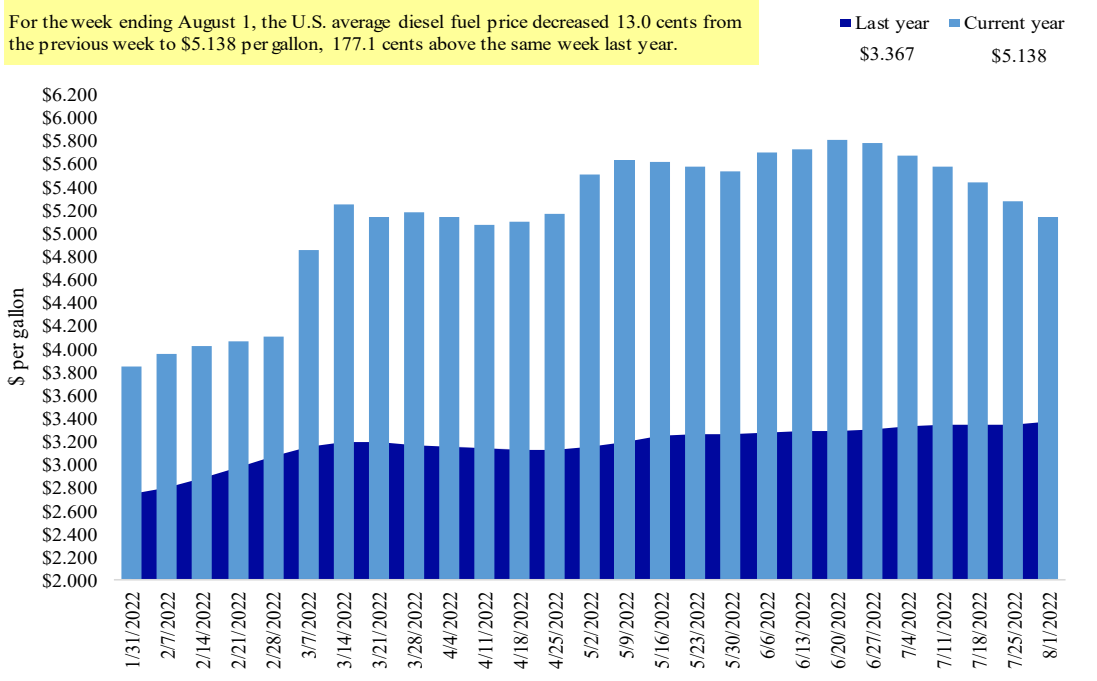
Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

NA = Not Available

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

Figure 13

Weekly diesel fuel prices, U.S. average



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

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

Grain Exports

Table 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]									
7/21/2022	1,594	1,154	1,571	1,349	124	5,792	5,209	6,170	17,171
This week year ago	1,690	1,077	1,538	1,062	8	5,375	7,543	2,809	15,727
Cumulative exports-marketing year[2]									
2021/22 YTD	727	398	695	367	18	2,205	55,392	53,369	110,965
2020/21 YTD	1,023	391	835	438	42	2,729	62,112	59,100	123,941
YTD 2021/22 as % of 2020/21	71	0	83	84	0	81	89	90	90
Last 4 wks. as % of same period 2020/21*	89	105	94	110	1,392	100	86	244	119
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 07/21/2022	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	2347.8	16,701	15,080	11	14,817
Japan	823.5	10,002	10,952	(9)	11,082
China	2961	14,716	22,981	(36)	7,920
Columbia	160	4,374	3,893	12	4,491
Korea	0	1,476	3,527	0	3,302
Top 5 importers	**6,292**	**47,268**	**56,434**	**(16)**	**41,613**
Total U.S. corn export sales	**7,600**	**60,601**	**69,655**	**(13)**	**53,145**
% of projected exports	12%	97%	99%		
Change from prior week[2]	**194**	**150**	**(115)**		
Top 5 importers' share of U.S. corn export sales	83%	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 07/21/2022	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	8,529	30,476	35,826	(15)	21,666
Mexico	834	5,412	4,804	13	4,754
Egypt	280	4,141	2,777	49	3,093
Indonesia	12	1,742	2,321	(25)	2,325
Japan	151	2,488	2,336	6	2,275
Top 5 importers	**9,806**	**44,258**	**48,065**	**(8)**	**34,113**
Total U.S. soybean export sales	**14,855**	**59,539**	**61,909**	**(4)**	**50,758**
% of projected exports	26%	101%	100%		
change from prior week[2]	**749**	**(59)**	**(79)**		
Top 5 importers' share of U.S. soybean export sales	66%	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 7/21/2022	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	1,321	1,356	(3)	3,388
Philippines	1,174	1,263	(7)	3,121
Japan	742	854	(13)	2,567
Korea	539	451	19	1,501
Nigeria	393	579	(32)	1,490
China	273	612	(55)	1,268
Taiwan	216	291	(26)	1,187
Indonesia	11	0	5400	1,131
Thailand	182	171	6	768
Italy	122	54	125	681
Top 10 importers	**4,973**	**5,632**	(12)	**17,102**
Total U.S. wheat export sales	**7,997**	**8,104**	(1)	**24,617**
% of projected exports	37%	37%		
change from prior week[2]	**412**	**515**		
Top 10 importers' share of U.S. wheat export sales	62%	70%		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 07/28/22	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	106	141	76	5,087	8,940	57	57	47	13,243
Corn	198	97	203	8,519	12,263	69	58	77	13,420
Soybeans	0	0	n/a	4,495	3,758	120	n/a	0	14,540
Total	**304**	**238**	**128**	**18,101**	**24,961**	**73**	**57**	**53**	**41,203**
Mississippi Gulf									
Wheat	62	160	39	2,449	1,777	138	82	107	3,202
Corn	462	471	98	23,271	28,714	81	77	108	38,498
Soybeans	456	264	172	13,090	10,815	121	288	108	27,159
Total	**980**	**895**	**109**	**38,810**	**41,306**	**94**	**105**	**108**	**68,858**
Texas Gulf									
Wheat	0	89	0	1,830	2,426	75	42	31	3,888
Corn	0	44	0	463	322	144	166	206	627
Soybeans	0	0	n/a	2	656	0	n/a	0	1,611
Total	**0**	**132**	**0**	**2,294**	**3,403**	**67**	**57**	**44**	**6,126**
Interior									
Wheat	101	56	180	1,710	1,754	98	81	114	2,973
Corn	176	109	161	5,423	5,686	95	87	88	10,157
Soybeans	124	135	92	4,084	3,625	113	147	103	6,525
Total	**401**	**301**	**133**	**11,218**	**11,065**	**101**	**99**	**97**	**19,656**
Great Lakes									
Wheat	0	20	0	132	253	52	82	41	536
Corn	0	7	0	125	55	226	151	453	145
Soybeans	0	6	0	239	56	429	61	24	592
Total	**0**	**33**	**0**	**496**	**365**	**136**	**89**	**48**	**1,273**
Atlantic									
Wheat	1	34	2	73	87	83	307	695	128
Corn	7	13	54	209	14	n/a	n/a	n/a	85
Soybeans	5	8	59	1,549	1,070	145	176	50	2,184
Total	**12**	**55**	**22**	**1,830**	**1,171**	**156**	**353**	**153**	**2,397**
U.S. total from ports*									
Wheat	270	501	54	11,280	15,237	74	66	62	23,969
Corn	842	741	114	38,010	47,054	81	76	99	62,932
Soybeans	584	413	141	23,460	19,979	117	226	87	52,612
Total	**1,696**	**1,654**	**103**	**72,749**	**82,270**	**88**	**89**	**86**	**139,512**

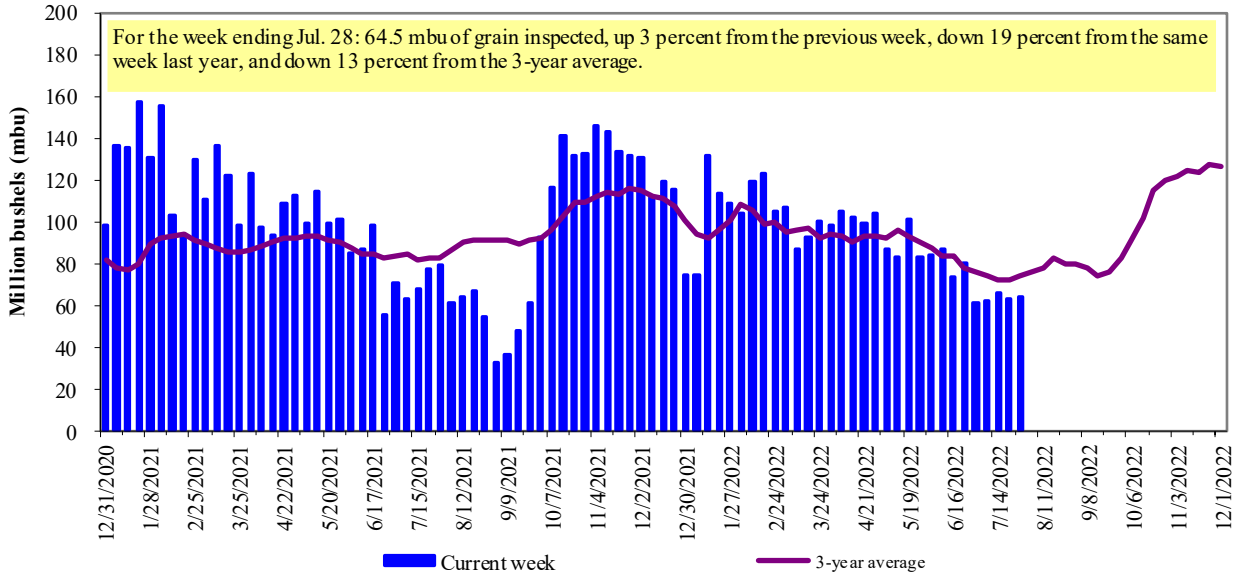
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

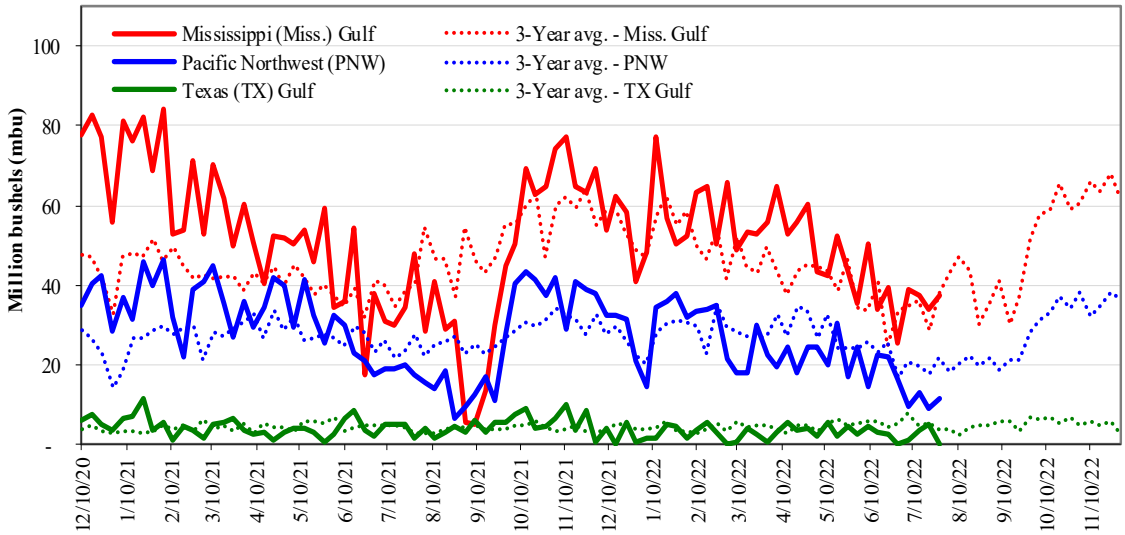


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 07/28/22 inspections (mbu):	
MS Gulf:	37.2
PNW:	11.7
TX Gulf:	0.0

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	up 9	down 100	down 5	up 30
Last Year (same wk):	down 23	down 100	down 25	down 33
3-yr avg. (4-wk. mov. Avg):	up 8	down 100	down 6	down 42

Source: USDA, Federal Grain Inspection Service.

Table 17

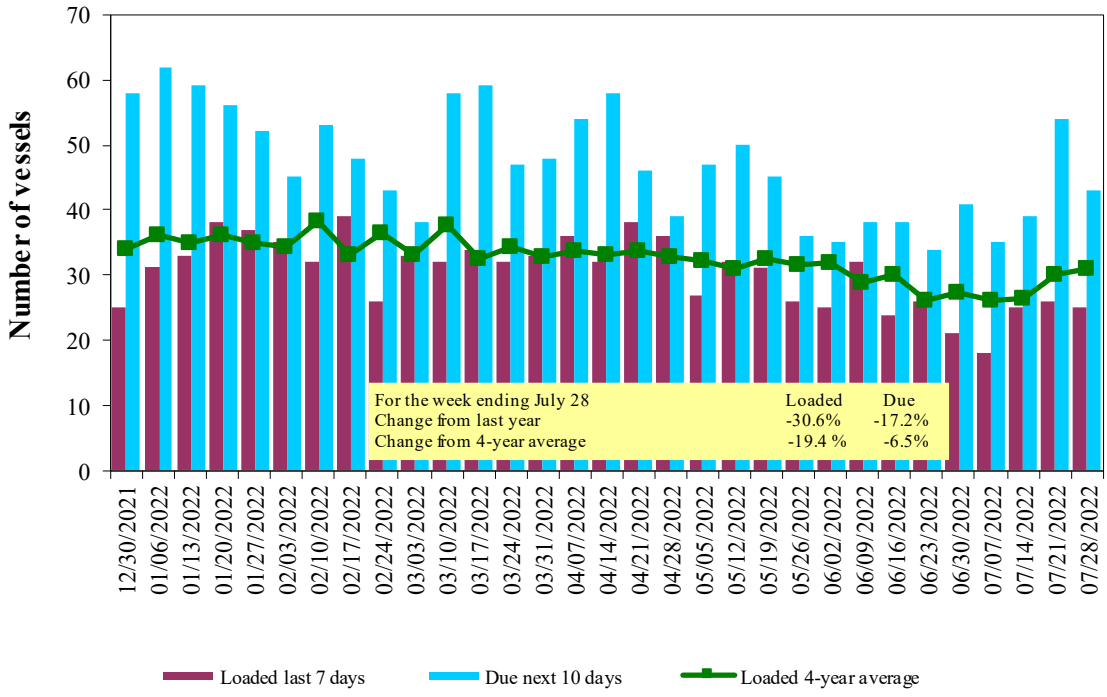
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
7/28/2022	22	25	43	9
7/21/2022	14	26	54	8
2021 range	(10…57)	(5...48)	(15...69)	(4…27)
2021 average	34	32	49	15

Source: USDA, Agricultural Marketing Service.

Figure 16

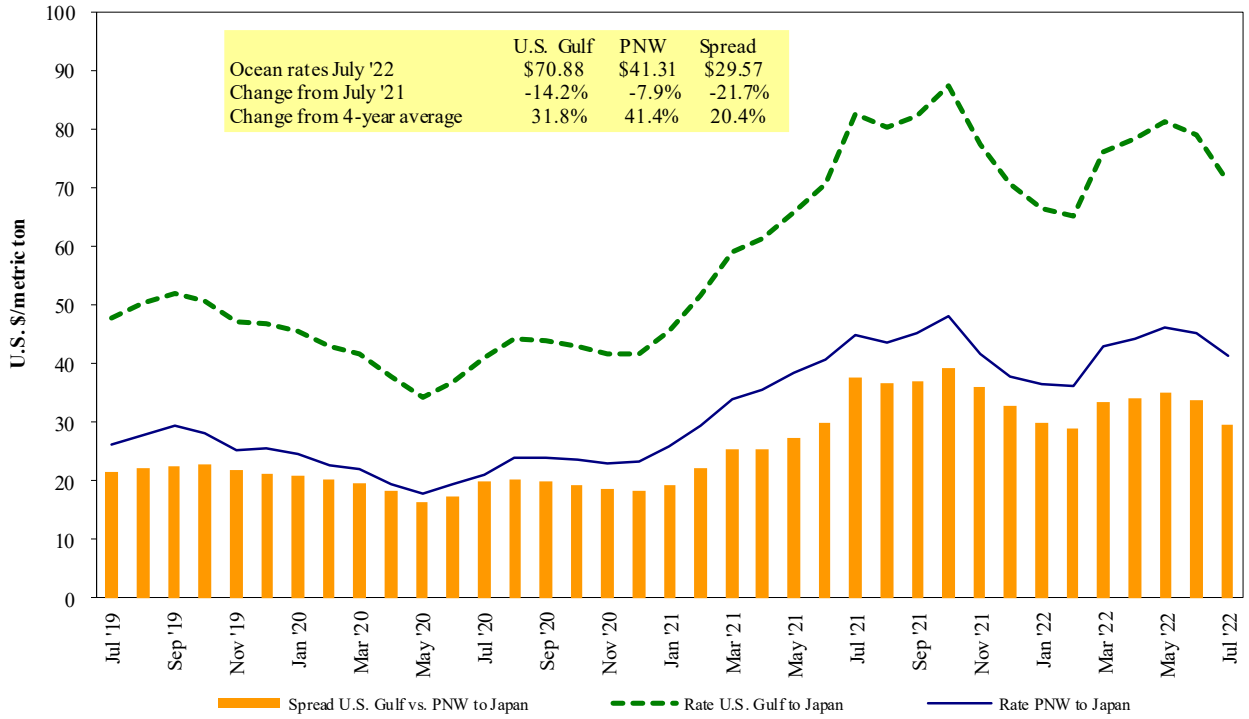
U.S. Gulf[1] vessel loading activity



[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 07/30/2022

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

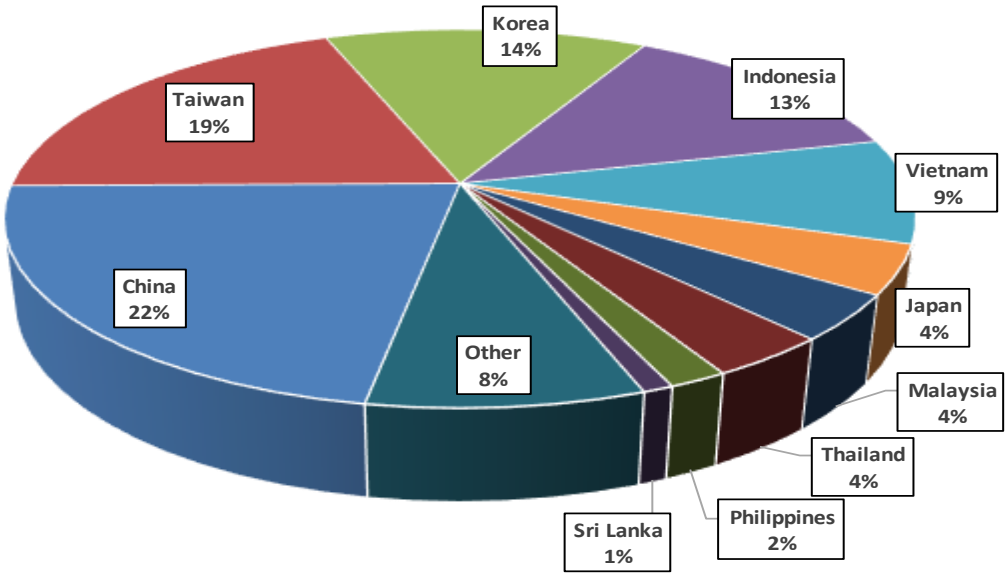
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

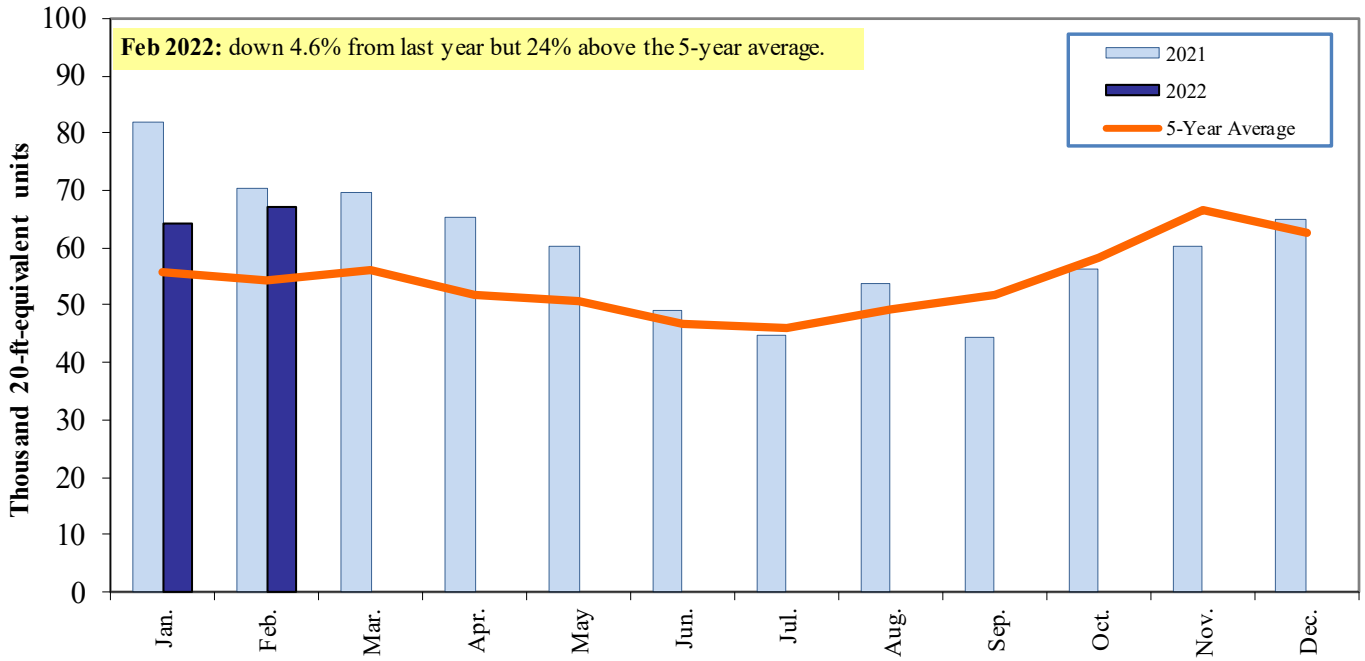
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Feb 2022



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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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 4, 2022. Web: **http://dx.doi.org/10.9752/TS056.08-04-2022**