United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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September 15, 2022

Contents

The next release is September 22, 2022

WEEKLY HIGHLIGHTS

Rail Unions and Rail Carriers Reach Tentative Deal

Earlier this morning, rail unions and rail carriers reached a tentative contract agreement, averting possible rail disruptions that could have occurred as early as September 16. After years of negotiations, a Presidential Emergency Board (PEB) issued recommendations on August 16 to help the two sides come to a resolution on contract negotiations. Following the PEB recommendations, negotiations continued during a mandatory 30-day cooling-off period, delaying any actions by labor unions or rail carriers to impact rail operations. The White House praised the U.S. Secretary of Labor, Secretary of Transportation, Secretary of Agriculture, and National Economic Council Director for their work with both sides to reach the tentative agreement. The White House commended their efforts to ensure continued rail operations and prevent further strain on agricultural and food supply chains.

Port Authority of New York, New Jersey Delays Dwell Fee for Empties

The Port of New York and New Jersey recently postponed its plan—originally set to begin on September 1—to charge ocean carriers a fee for long-dwelling containers. The plan is intended to cull some empties from the dock. Through a public comment period, port officials uncovered unanticipated consequences of the fee plan. Ocean carriers have committed to restoring fluidity to port traffic and have been working on plans to remove the empties. Port officials are working to modify the current fee plan and have delayed implementing the charge until the fourth quarter of this year, with the first invoices being issued in January.

FMCSA Extends Emergency HOS Waiver for Feed and Fuel

The Federal Motor Carrier Safety Administration (FMCSA), extended through October 15 its waiver on hours-of-service (HOS) requirements for trucks transporting feed, fuel, propane, and ethanol. FMCSA cautioned the waiver may end sooner than October 15 if conditions warrant. Originally issued in 2020 to help address the national COVID-19 emergency, the waiver still exempts property-carrying vehicles from FMCSA-mandated maximum driving times. Like previous iterations, the current waiver forbids motor carriers from asking truckers to haul loads when they say they are tired. The waiver does not cover routine commercial deliveries—including mixed loads—with nominal amounts of waiver-qualifying materials. Carriers and drivers operating under the waiver's terms must report their reliance on the waiver within 5 days of the end of each month through an FMCSA electronic portal.

Snapshots by Sector

Export Sales

USDA's Foreign Agricultural Service (FAS) encountered difficulties during the launch of its new Export Sales Reporting and Maintenance System on August 25. Therefore, FAS was unable to publish weekly export sales data on Thursday, September 1 and Thursday, September 8. The agency resumed regular reporting today, Thursday, September 15, and will be reflected starting with next week's *Grain Transportation Report*.

Rail

U.S. Class I railroads originated 20,342 **grain carloads** during the week ending September 3. This was a 5-percent increase from the previous week, 22 percent more than last year, and 1 percent fewer than the 3-year average.

Average September shuttle **secondary railcar** bids/offers (per car) were $167 above tariff for the week ending September 8. This was $253 more than last week and $184 lower than this week last year.

Barge

For the week ending September 10, **barged grain movements** totaled 249,727 tons. This was 4 percent higher than the previous week and 41 percent more than the same period last year.

For the week ending September 10, 155 grain barges **moved down river**—5 more barges than last week. There were 348 grain barges **unloaded** in the New Orleans region, 26 percent fewer than last week.

Ocean

For the week ending September 8, 18 **oceangoing grain vessels** were loaded in the Gulf—200 percent more than the same period last year. Within the next 10 days (starting September 9), 37 vessels were expected to be loaded—23 percent more than the same period last year. At this time last year, vessel loadings were low due to Hurricane Ida.

As of September 8, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $58.00. This was 2 percent more than the previous week. The rate from the Pacific Northwest to Japan was $33.50 per mt, unchanged from the previous week.

Fuel

For the week ending September 12, the U.S. average **diesel fuel price** decreased 5.1 cents from the previous week to $5.033 per gallon, 166.1 cents above the same week last year.

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Feature Article/Calendar

Second-Quarter 2022 Corn and Soybean Transportation Costs Continue To Rise

Transportation costs for shipping corn and soybeans from Minneapolis, MN, to Japan via the U.S. Gulf (Gulf route), and from Minneapolis to Japan via the Pacific Northwest (the PNW route), increased from second quarter 2021 to second quarter 2022 (year to year) and from first quarter 2022 to second quarter 2022 (quarter to quarter). For most routes, notable year-to-year increases in ocean freight and trucking rates were the primary drivers behind increases in corn and soybean transportation costs. The higher ocean rates largely reflected rising global inflation, the effects of the war in Ukraine, and fluctuating Chinese demand (*Grain Transportation Report (GTR)*, July 21, 2022). Trucking rates soared because of higher diesel prices and increased demand for grain.

For corn and soybean shipments to Japan by all routes, total landed costs increased significantly from year to year because of both higher transportation costs and higher farm values. Quarter to quarter, landed cost increases continued to be steeper for corn than for soybeans (tables 1 and 2).

Table 1: Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	2nd qtr. '21	1st qtr. '22	2nd qtr. '22	Yr. to Yr.	Qtr to Qtr	2nd qtr. '21	1st qtr. '22	2nd qtr. '22	Yr. to Yr.	Qtr to Qtr
Truck	13.99	16.67	23.40	67.26	40.37	13.99	16.67	23.40	67.26	40.37
Barge[1]	29.60	29.07	44.56	50.54	53.29	29.60	29.07	44.56	50.54	53.29
Rail[2]	-	41.74	-	-	-	-	38.04	-	-	-
Ocean	65.94	69.31	79.61	20.73	14.86	65.94	69.31	79.61	20.73	14.86
Total transportation cost	109.53	156.79	147.57	34.73	-5.88	109.53	153.09	147.57	34.73	-3.61
Farm value[3]	205.89	228.60	270.33	31.30	18.25	529.11	527.88	589.12	11.34	11.60
Total landed cost	315.42	385.39	417.9	32.49	8.44	638.64	680.97	736.69	15.35	8.18
Transportation % landed cost	34.73	40.68	35.31			17.15	22.48	20.03		

Table 2: Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	2nd qtr. '21	1st qtr. '22	2nd qtr. '22	Yr. to Yr.	Qtr to Qtr	2nd qtr. '21	1st qtr. '22	2nd qtr. '22	Yr. to Yr.	Qtr to Qtr
Truck	13.99	16.67	23.40	67.26	40.37	13.99	16.67	23.40	67.26	40.37
Rail[2]	51.44	53.43	53.43	3.87	0.00	58.59	60.58	60.58	3.40	0.00
Ocean	38.34	38.47	45.20	17.89	17.49	38.34	38.47	45.20	17.89	17.49
Total Transportation Cost	103.77	108.57	122.03	17.60	12.40	110.92	115.72	129.18	16.46	11.63
Farm Value[3]	205.89	228.60	270.33	31.30	18.25	529.11	527.88	589.12	11.34	11.60
Total Landed Cost	309.66	337.17	392.36	26.71	16.37	640.03	643.60	718.30	12.23	11.61
Transportation % Landed Cost	33.51	32.20	31.10			17.33	17.98	17.98		

[1] Barge rates are from Minneapolis to the Gulf for the second quarter and St. Louis to the Gulf for the first quarter. First quarter also includes a rail portion, from Minneapolis to St. Louis, given the closure of the the Upper Mississippi River.

[2] All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[3] USDA, National Agricultural Statistics Service is the source for corn and soybean prices.

Note: qtr. = quarter; yr. = year.

Source: USDA, Agricultural Marketing Service.

U.S. Gulf Costs

Transportation and landed costs. Year to year, transportation costs through the Gulf increased 35 percent for corn and soybeans. For both corn and soybeans, rising barge rates (up 51 percent) and truck rates (up 67 percent) drove these increases. Quarter to quarter, transportation costs for Gulf-route shipping were down 6 percent for corn and down 4 percent for soybeans, as the opening of the Upper Mississippi allowed full barge trips to the Gulf.

Year to year, transportation's share of Gulf-route landed costs rose for corn and soybeans. In second quarter 2022, farm values accounted for 65 percent of landed costs for corn and 80 percent of the landed costs for soybeans (see table 1).

Exports. Accounting for 59 percent of total second-quarter 2022 corn exports, Gulf-route corn inspections for export totaled 10.3 million metric tons (mmt), down 25 percent year to year. Accounting for 60 percent of total second-quarter 2022 soybean exports, Gulf-route soybean inspections for export totaled 4.5 mmt, up 115 percent year to year (*GTR,* July 14, 2022).

Pacific Northwest Costs

Transportation and landed costs. Year to year, total PNW-route transportation costs jumped 18 percent for corn and rose 16 percent for soybeans, mainly because of higher trucking and ocean freight rates (table 2). Quarter to quarter, transportation costs increased 12 percent each for corn and soybeans. For the same period, PNW-route rail rates were unchanged for corn and for soybeans.

Because of both higher transportation costs and higher farm values, total PNW-route landed costs for corn increased 16 percent quarter to quarter and rose 27 percent year to year. Similar to corn, soybean landed costs increased 12 percent quarter to quarter and rose 12 percent year to year, as a result of higher transportation costs and higher farm values.

For PNW-route corn shipments in second quarter 2022, transportation costs accounted for 31 percent of the total landed costs, amounting to decreases both quarter to quarter and year to year. For soybeans, transportation costs accounted for 18 percent of landed costs—a share that was unchanged quarter-to-quarter and up year-to-year (see table 2).

Exports. Second-quarter 2022 PNW corn exports totaled 4.5 mmt, down 32 percent year to year, mainly because of decreased shipments to China and Japan (*GTR,* July 14, 2022). PNW corn exports were 26 percent of total second quarter 2022 corn exports. Second-quarter 2022 PNW soybean exports totaled 0.565 mmt, a sharp 1,027-percent increase year to year, rebounding from the second lowest quarter on record for soybean exports in the PNW region. Despite this increase, PNW soybean exports accounted for only 7 percent of total second-quarter 2022 soybean exports.

Market Outlook

According to USDA's August *World Agricultural Supply and Demand Estimates* report, from marketing year (MY) 2021/22 to MY 2022/23, total U.S. corn exports are expected to decrease 3 percent to 60 mmt, because of tightened supplies and higher prices. Also, from MY 2021/22 to MY 2022/23, soybean exports are expected to remain unchanged at 59 mmt.

Bernadette.Winston@usda.gov

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
09/14/22	338	335	271	454	259	238
09/07/22	341	335	263	359	255	238

[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	9/9/2022	9/2/2022
Corn	IL–Gulf	-1.13	-0.98
Corn	NE–Gulf	-0.99	-1.02
Soybean	IA–Gulf	-2.31	-2.25
HRW	KS–Gulf	-2.78	-2.24
HRS	ND–Portland	-2.87	-2.19

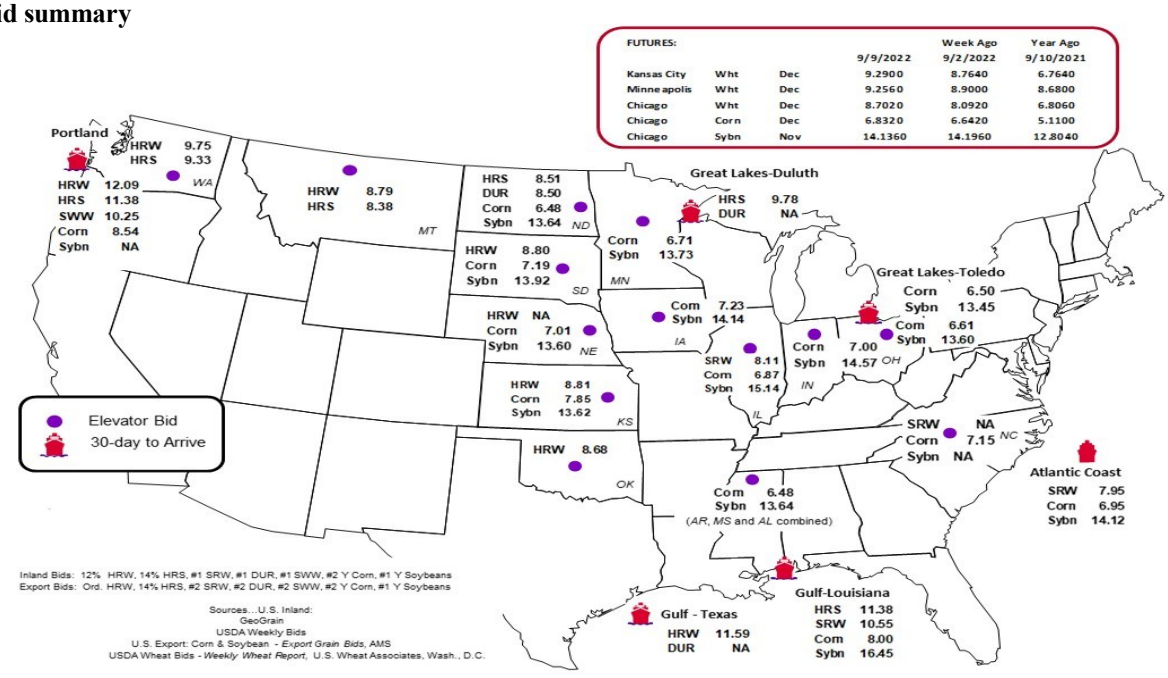
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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]
9/7/2022[p]	329	360	3,015	119	3,823	9/3/2022	2,738
8/31/2022[r]	225	234	2,118	74	2,651	8/27/2022	2,937
2022 YTD[r]	41,392	29,261	175,756	15,548	261,957	2022 YTD	96,775
2021 YTD[r]	36,875	46,554	192,418	10,366	286,213	2021 YTD	100,694
2022 YTD as % of 2021 YTD	112	63	91	150	92	% of 2021 YTD	96
Last 4 weeks as % of 2021[2]	151	58	124	169	112	Last 4wks. % 2021	88
Last 4 weeks as % of 4-year avg.[2]	57	50	66	55	62	Last 4wks. % 4 yr.	100
Total 2021	53,554	68,335	305,865	21,913	449,667	Total 2021	145,883
Total 2020	45,177	63,348	296,060	24,202	428,787	Total 2020	126,407

[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.

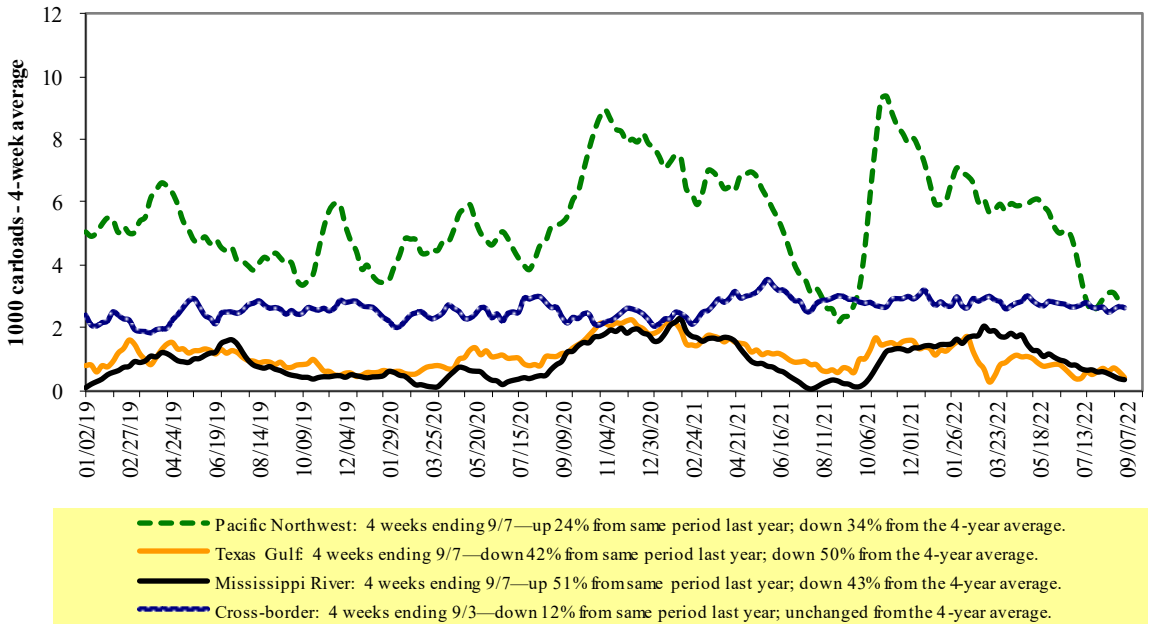
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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	
9/3/2022	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,431	1,828	10,397	1,101	5,585	20,342	2,207	3,161
This week last year	1,229	1,474	7,456	1,427	5,057	16,643	3,231	3,753
2022 YTD	62,351	84,899	380,467	42,749	201,317	771,783	117,842	118,799
2021 YTD	63,007	86,256	404,628	40,061	214,600	808,552	143,449	168,735
2022 YTD as % of 2021 YTD	99	98	94	107	94	95	82	70
Last 4 weeks as % of 2021*	122	123	117	90	115	115	79	104
Last 4 weeks as % of 3-yr. avg.**	109	97	93	105	114	101	69	73
Total 2021	93,935	120,650	609,890	64,818	318,002	1,207,295	210,044	242,533

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

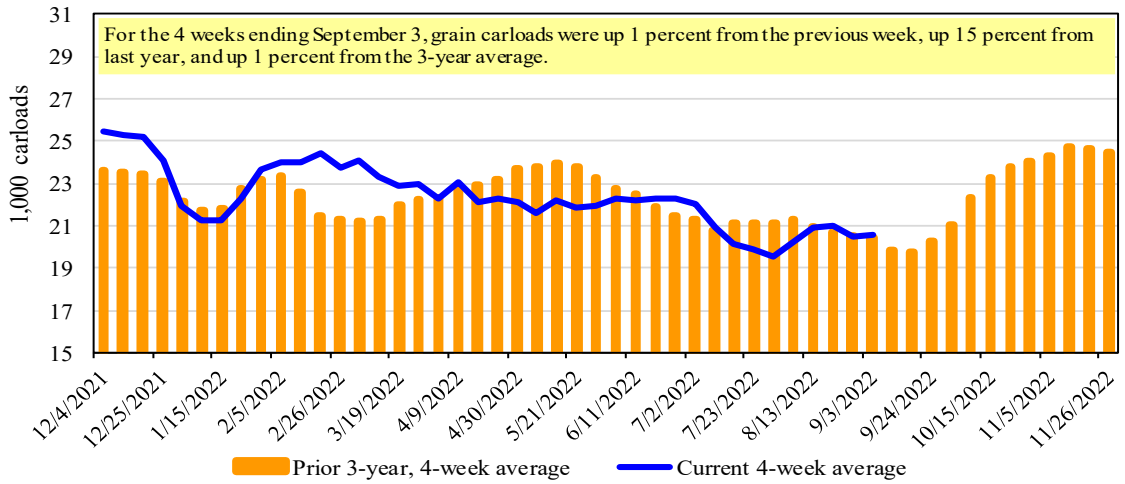
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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							
9/8/2022		Sep-22	Sep-21	Oct-22	Oct-21	Nov-22	Nov-21	Dec-22	Dec-21
BNSF[3]	COT grain units	0	n/a	0	0	no bids	0	0	0
	COT grain single-car	no bids	no bids	156	129	111	0	75	0
UP[4]	GCAS/Region 1	no offer	n/a	no offer	n/a	no offer	n/a	n/a	n/a
	GCAS/Region 2	no offer	n/a	no offer	n/a	no offer	n/a	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.

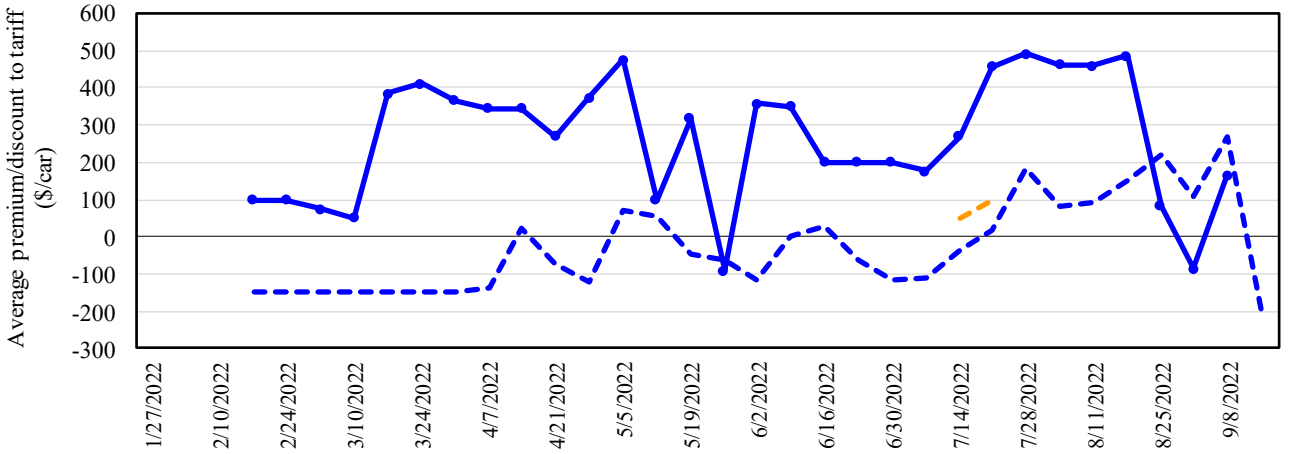
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 September 2022

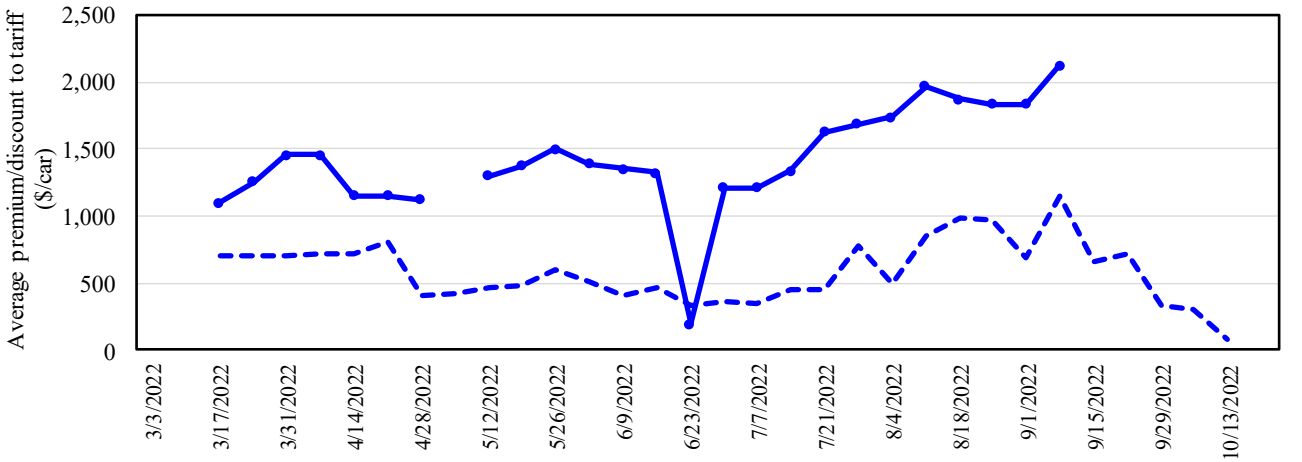


9/8/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$150	$183

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $253 this week and are $324 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 October 2022



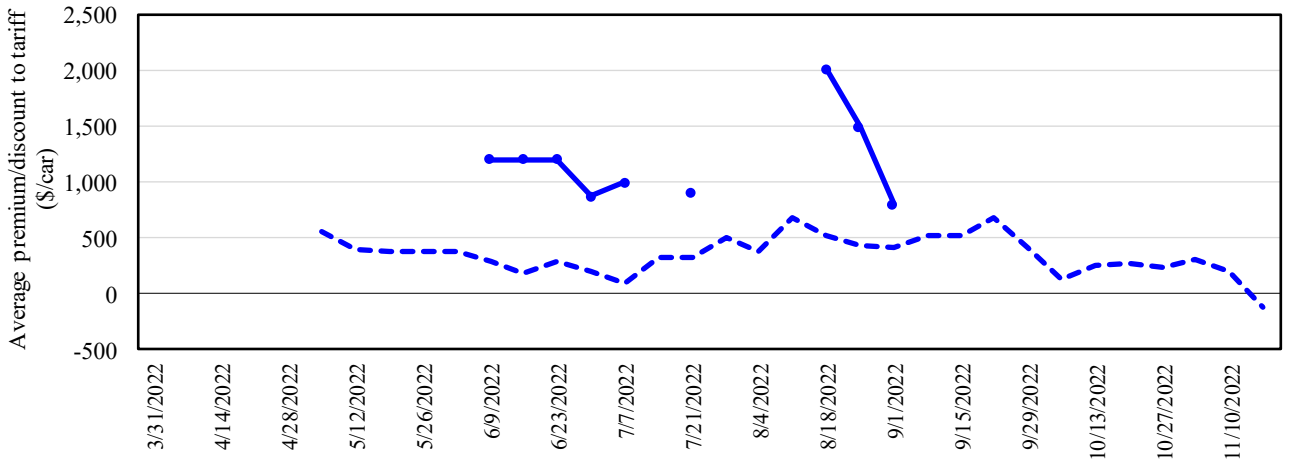
9/8/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$1,813	$2,438

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $292 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 November 2022



9/8/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	n/a	n/a

There were no non-shuttle bids/offers this week.
There were no shuttle bids/offers this week.

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					
	9/8/2022	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-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**	**150**	**1,813**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	198	71	n/a	n/a	n/a	n/a
	Change from same week 2021	(51)	836	n/a	n/a	n/a	n/a
	UP-Pool	**183**	**2,438**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	308	513	n/a	n/a	n/a	n/a
	Change from same week 2021	(317)	1,000	n/a	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]

September 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	$344	$40.11	$1.09	6
	Grand Forks, ND	Duluth-Superior, MN	$3,858	$167	$39.97	$1.09	10
	Wichita, KS	Los Angeles, CA	$7,490	$857	$82.89	$2.26	17
	Wichita, KS	New Orleans, LA	$4,600	$605	$51.69	$1.41	10
	Sioux Falls, SD	Galveston-Houston, TX	$7,226	$703	$78.74	$2.14	16
	Colby, KS	Galveston-Houston, TX	$4,850	$663	$54.75	$1.49	9
	Amarillo, TX	Los Angeles, CA	$5,121	$923	$60.02	$1.63	11
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$684	$46.52	$1.18	13
	Toledo, OH	Raleigh, NC	$8,551	$757	$92.43	$2.35	19
	Des Moines, IA	Davenport, IA	$2,505	$145	$26.31	$0.67	6
	Indianapolis, IN	Atlanta, GA	$6,593	$568	$71.12	$1.81	20
	Indianapolis, IN	Knoxville, TN	$5,564	$368	$58.91	$1.50	18
	Des Moines, IA	Little Rock, AR	$4,000	$426	$43.95	$1.12	9
	Des Moines, IA	Los Angeles, CA	$5,880	$1,240	$70.70	$1.80	14
Soybeans	Minneapolis, MN	New Orleans, LA	$4,431	$1,077	$54.70	$1.49	41
	Toledo, OH	Huntsville, AL	$7,037	$539	$75.24	$2.05	15
	Indianapolis, IN	Raleigh, NC	$7,843	$767	$85.51	$2.33	21
	Indianapolis, IN	Huntsville, AL	$5,689	$364	$60.11	$1.64	15
	Champaign-Urbana, IL	New Orleans, LA	$4,865	$684	$55.11	$1.50	13
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,393	$493	$48.52	$1.32	17
	Wichita, KS	Galveston-Houston, TX	$4,611	$384	$49.60	$1.35	18
	Chicago, IL	Albany, NY	$7,090	$715	$77.50	$2.11	22
	Grand Forks, ND	Portland, OR	$6,051	$851	$68.54	$1.87	18
	Grand Forks, ND	Galveston-Houston, TX	$5,399	$886	$62.42	$1.70	10
	Colby, KS	Portland, OR	$5,923	$1,087	$69.62	$1.89	9
Corn	Minneapolis, MN	Portland, OR	$5,380	$1,037	$63.72	$1.62	24
	Sioux Falls, SD	Tacoma, WA	$5,340	$949	$62.45	$1.59	22
	Champaign-Urbana, IL	New Orleans, LA	$3,920	$684	$45.72	$1.16	13
	Lincoln, NE	Galveston-Houston, TX	$4,080	$553	$46.01	$1.17	19
	Des Moines, IA	Amarillo, TX	$4,420	$535	$49.21	$1.25	10
	Minneapolis, MN	Tacoma, WA	$5,380	$1,028	$63.64	$1.62	24
	Council Bluffs, IA	Stockton, CA	$5,300	$1,063	$63.19	$1.61	25
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,350	$949	$72.48	$1.97	21
	Minneapolis, MN	Portland, OR	$6,400	$1,037	$73.85	$2.01	22
	Fargo, ND	Tacoma, WA	$6,250	$844	$70.45	$1.92	19
	Council Bluffs, IA	New Orleans, LA	$5,095	$789	$58.43	$1.59	14
	Toledo, OH	Huntsville, AL	$4,797	$539	$52.99	$1.44	8
	Grand Island, NE	Portland, OR	$5,730	$1,113	$67.96	$1.85	21

[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.

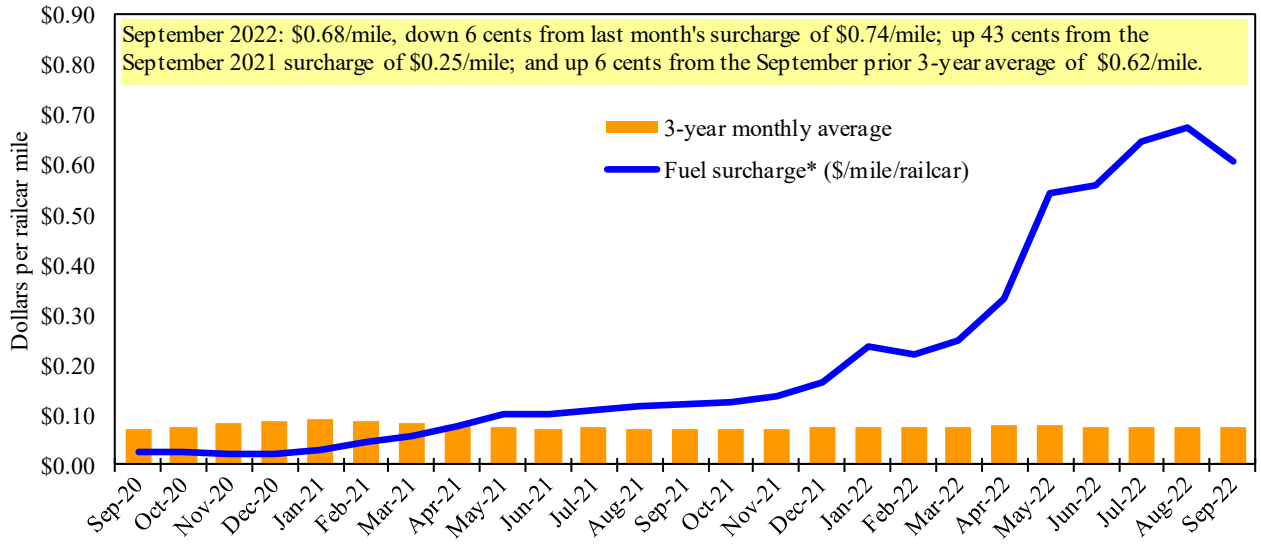
[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

[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.

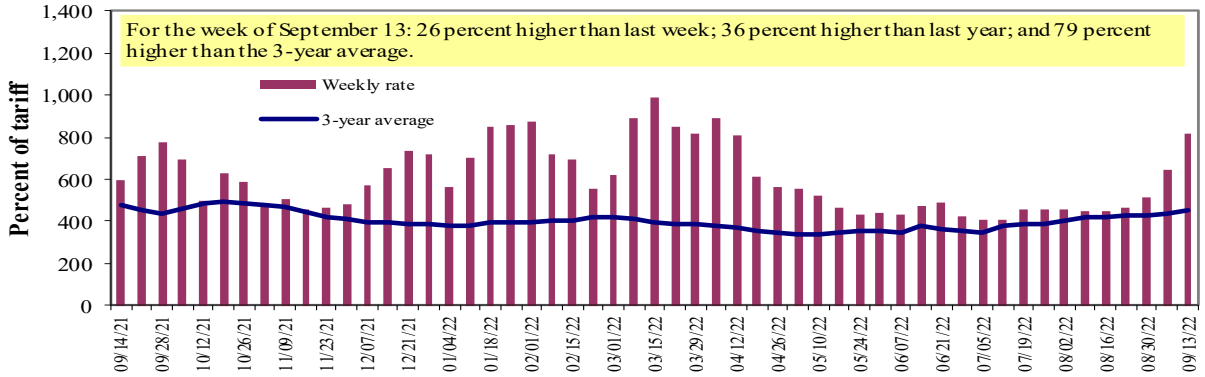
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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

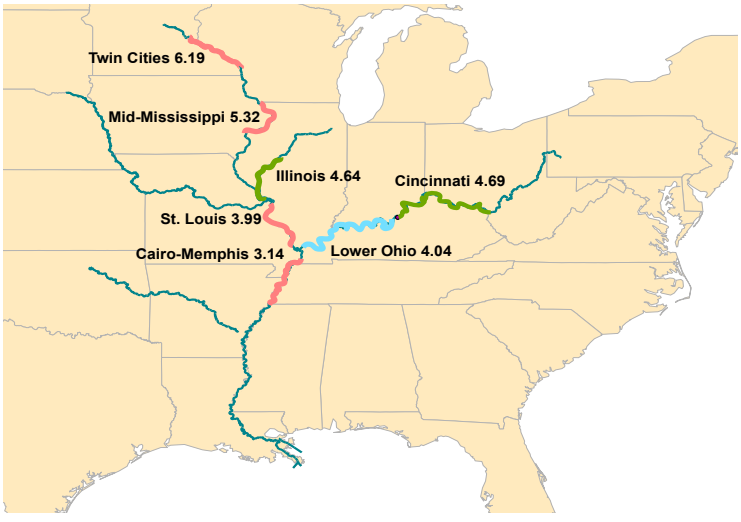
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	9/13/2022	846	858	817	694	792	792	657
	9/6/2022	703	672	647	561	609	609	528
$/ton	9/13/2022	52.37	45.65	37.91	27.69	37.14	32.00	20.63
	9/6/2022	43.52	35.75	30.02	22.38	28.56	24.60	16.58
Current week % change from the same week:								
	Last year	43	40	36	21	25	25	2
	3-year avg. [2]	85	99	-	90	101	101	72
Rate[1]	October	953	941	935	836	925	925	765
	December	-	-	671	550	628	628	508

[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

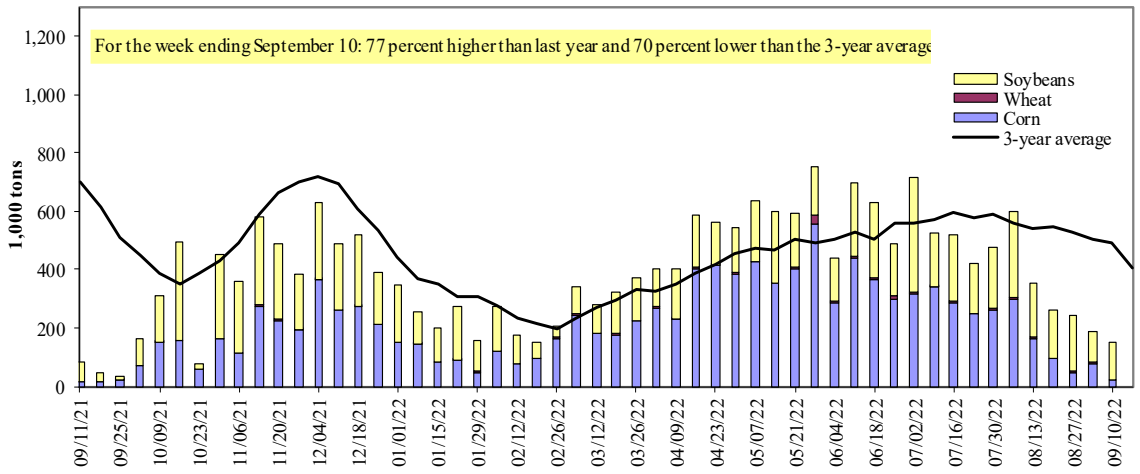
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 09/10/2022	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	3	0	46	0	49
Winfield, MO (L25)	11	0	99	0	110
Alton, IL (L26)	20	0	118	0	138
Granite City, IL (L27)	22	0	127	0	149
Illinois River (La Grange)	10	0	26	0	36
Ohio River (Olmsted)	18	18	34	4	74
Arkansas River (L1)	4	20	3	0	27
Weekly total - 2022	44	38	164	4	250
Weekly total - 2021	28	58	91	0	177
2022 YTD[1]	13,109	1,431	8,683	185	23,409
2021 YTD[1]	18,812	1,334	5,975	217	26,338
2022 as % of 2021 YTD	70	107	145	85	89
Last 4 weeks as % of 2021[2]	114	56	117	36	102
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.

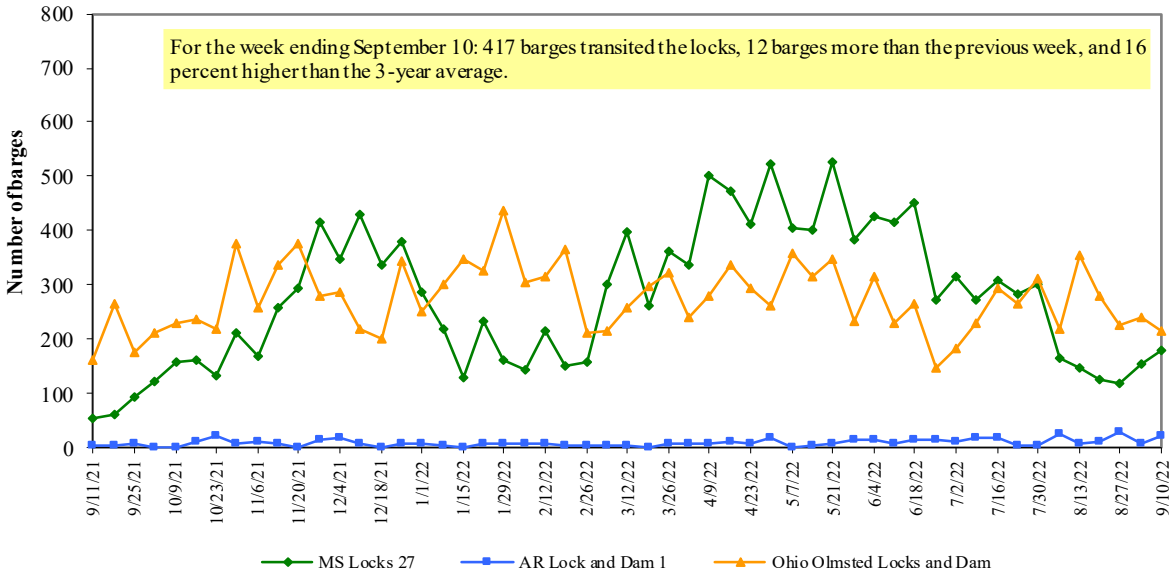
[2] As a percent of same period in 2021.

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

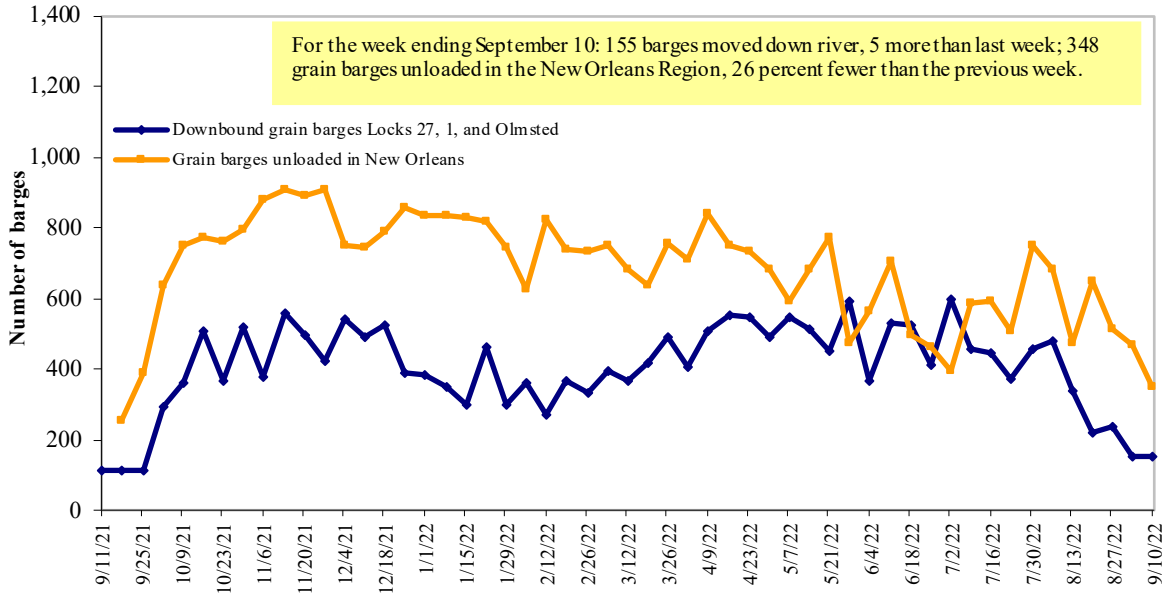


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

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 9/12/2022 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	4.949	-0.084	1.612
	New England	5.087	-0.074	1.799
	Central Atlantic	5.134	-0.089	1.648
	Lower Atlantic	4.865	-0.085	1.619
II	Midwest	5.085	-0.047	1.803
III	Gulf Coast	4.760	-0.036	1.661
IV	Rocky Mountain	4.961	-0.010	1.325
V	West Coast	5.658	-0.035	1.642
	West Coast less California	5.217	-0.058	1.556
	California	6.164	-0.010	1.851
Total	United States	5.033	-0.051	1.661

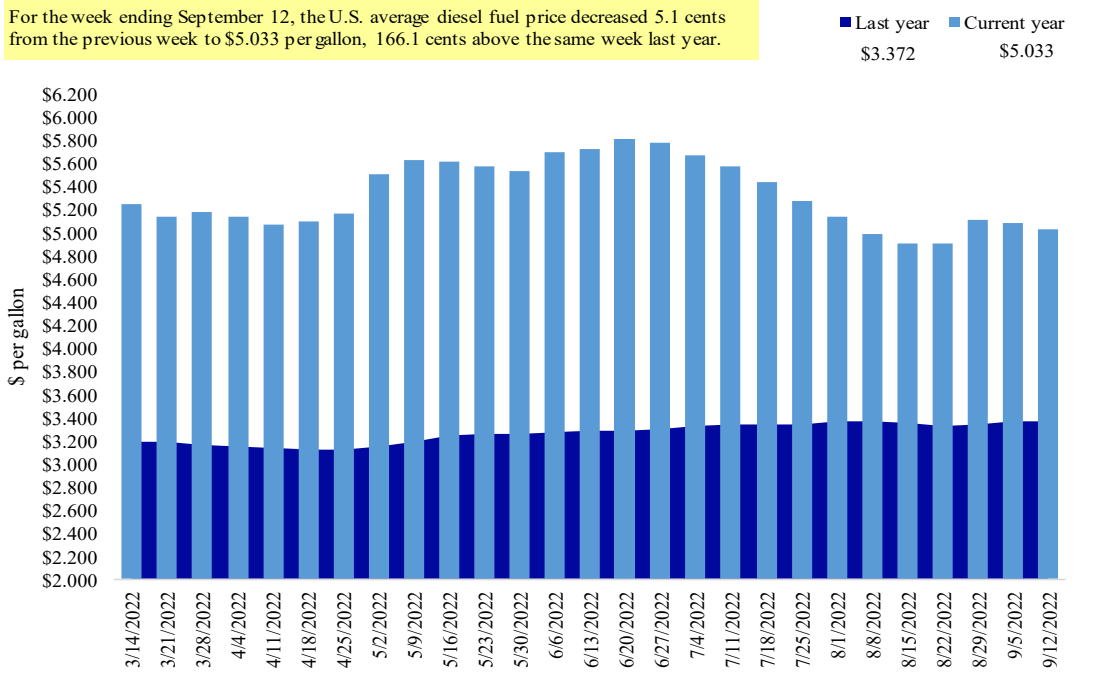
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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]									
8/11/2022	1,471	866	1,489	1,420	109	5,355	3,209	4,076	12,640
This week year ago	1,631	889	1,271	877	8	4,677	4,906	2,381	11,964
Cumulative exports-marketing year[2]									
2021/22 YTD	1,163	745	1,011	521	18	3,458	57,741	55,482	116,681
2020/21 YTD	1,531	706	1,291	766	42	4,336	65,412	59,703	129,451
YTD 2021/22 as % of 2020/21	76	0	78	68	0	80	88	93	90
Last 4 wks. as % of same period 2020/21	95	112	119	162	1,347	120	84	216	124
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.

The USDA's Foreign Agricultural Service (FAS) encountered issues during the during the launch of the new Export Sales Reporting and Maintenance System on August 25 and was unable to publish weekly export sales data on Thursday, September 1 or Thursday, September 8. FAS expects to resume regular reporting on Thursday, September 15.

Table 13

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

For the week ending 08/11/2022	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. 2018-20
		1,000 mt -			
Mexico	2783.3	16,879	15,620	8	14,817
Japan	849.5	10,118	11,049	(8)	11,082
China	3097.5	14,796	22,883	(35)	7,920
Columbia	174	4,403	3,949	12	4,491
Korea	0	1,476	3,527	0	3,302
Top 5 importers	**6,904**	**47,672**	**57,027**	**(16)**	**41,613**
Total U.S. corn export sales	**8,798**	**60,950**	**70,318**	**(13)**	**53,145**
% of projected exports	15%	98%	101%		
Change from prior week[2]	**750**	**99**	**216**		
Top 5 importers' share of U.S. corn export sales	78%	78%	81%		78%
USDA forecast August 2022	**60,433**	**62,341**	**69,898**	**(11)**	
Corn use for ethanol USDA forecast, August 2022	**136,525**	**135,890**	**127,838**	**6**	

[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.

The USDA's Foreign Agricultural Service (FAS) encountered issues during the during the launch of the new Export Sales Reporting and Maintenance System on August 25 and was unable to publish weekly export sales data on Thursday, September 1 or Thursday, September 8. FAS expects to resume regular reporting on Thursday, September 15.

Table 14

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

For the week ending 08/11/2022	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	9,647	30,615	35,962	(15)	21,666
Mexico	1,082	5,465	4,805	14	4,754
Egypt	340	4,082	2,777	47	3,093
Indonesia	31	1,800	2,364	(24)	2,325
Japan	191	2,576	2,368	9	2,275
Top 5 importers	**11,291**	**44,538**	**48,276**	**(8)**	**34,113**
Total U.S. soybean export sales	**17,046**	**59,558**	**62,085**	**(4)**	**50,758**
% of projected exports	29%	101%	101%		
change from prior week[2]	**1,303**	**97**	**68**		
Top 5 importers' share of U.S. soybean export sales	66%	75%	78%		**67%**
USDA forecast, August 2022	**58,719**	**58,856**	**61,744**	**(5)**	

[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.

The USDA's Foreign Agricultural Service (FAS) encountered issues during the during the launch of the new Export Sales Reporting and Maintenance System on August 25 and was unable to publish weekly export sales data on Thursday, September 1 or Thursday, September 8. FAS expects to resume regular reporting on Thursday, September 15.

Table 15

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

For the week ending 8/11/2022	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	1,571	1,473	7	3,388
Philippines	1,236	1,325	(7)	3,121
Japan	810	889	(9)	2,567
Korea	605	580	4	1,501
Nigeria	408	687	(41)	1,490
China	273	809	(66)	1,268
Taiwan	269	343	(22)	1,187
Indonesia	81	0	40400	1,131
Thailand	182	177	3	768
Italy	122	72	69	681
Top 10 importers	**5,557**	**6,355**	(13)	**17,102**
Total U.S. wheat export sales	**8,813**	**9,012**	(2)	**24,617**
% of projected exports	39%	41%		
change from prior week[2]	**207**	**307**		
Top 10 importers' share of U.S. wheat export sales	63%	71%		69%
USDA forecast, August 2022	**22,480**	**21,798**	3	

[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.

The USDA's Foreign Agricultural Service (FAS) encountered issues during the during the launch of the new Export Sales Reporting and Maintenance System on August 25 and was unable to publish weekly export sales data on Thursday, September 1 or Thursday, September 8. FAS expects to resume regular reporting on Thursday, September 15.

Table 16

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

Port regions	For the week ending 09/08/22	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	353	324	109	6,887	10,891	63	113	107	13,243
Corn	67	0	n/a	8,952	12,322	73	n/a	129	13,420
Soybeans	73	71	103	5,212	3,824	136	650	63	14,540
Total	**494**	**396**	**125**	**21,052**	**27,037**	**78**	**166**	**96**	**41,203**
Mississippi Gulf									
Wheat	91	138	66	3,344	2,339	143	226	161	3,202
Corn	202	390	52	25,482	30,921	82	145	109	38,498
Soybeans	233	365	64	15,684	11,672	134	245	59	27,159
Total	**527**	**893**	**59**	**44,510**	**44,933**	**99**	**187**	**85**	**68,858**
Texas Gulf									
Wheat	151	0	n/a	2,297	2,924	79	75	76	3,888
Corn	0	35	0	557	421	132	70	88	627
Soybeans	0	0	n/a	2	656	0	n/a	0	1,611
Total	**151**	**35**	**427**	**2,856**	**4,001**	**71**	**74**	**63**	**6,126**
Interior									
Wheat	113	102	111	2,161	2,257	96	89	147	2,973
Corn	166	88	189	6,228	6,670	93	83	88	10,157
Soybeans	36	83	44	4,635	4,050	114	94	67	6,525
Total	**316**	**273**	**116**	**13,024**	**12,977**	**100**	**87**	**91**	**19,656**
Great Lakes									
Wheat	64	1	n/a	232	305	76	158	52	536
Corn	0	9	0	141	94	150	41	72	145
Soybeans	0	0	n/a	239	67	357	n/a	0	592
Total	**64**	**10**	**647**	**612**	**466**	**131**	**102**	**40**	**1,273**
Atlantic									
Wheat	2	1	112	125	93	134	642	283	128
Corn	3	0	n/a	220	42	525	36	80	85
Soybeans	4	8	52	1,588	1,084	147	228	52	2,184
Total	**8**	**9**	**93**	**1,933**	**1,219**	**159**	**120**	**70**	**2,397**
U.S. total from ports*									
Wheat	775	567	137	15,046	18,808	80	117	112	23,969
Corn	439	522	84	41,579	50,471	82	133	105	62,932
Soybeans	347	527	66	27,361	21,354	128	222	58	52,612
Total	**1,561**	**1,616**	**97**	**83,986**	**90,633**	**93**	**143**	**87**	**139,512**

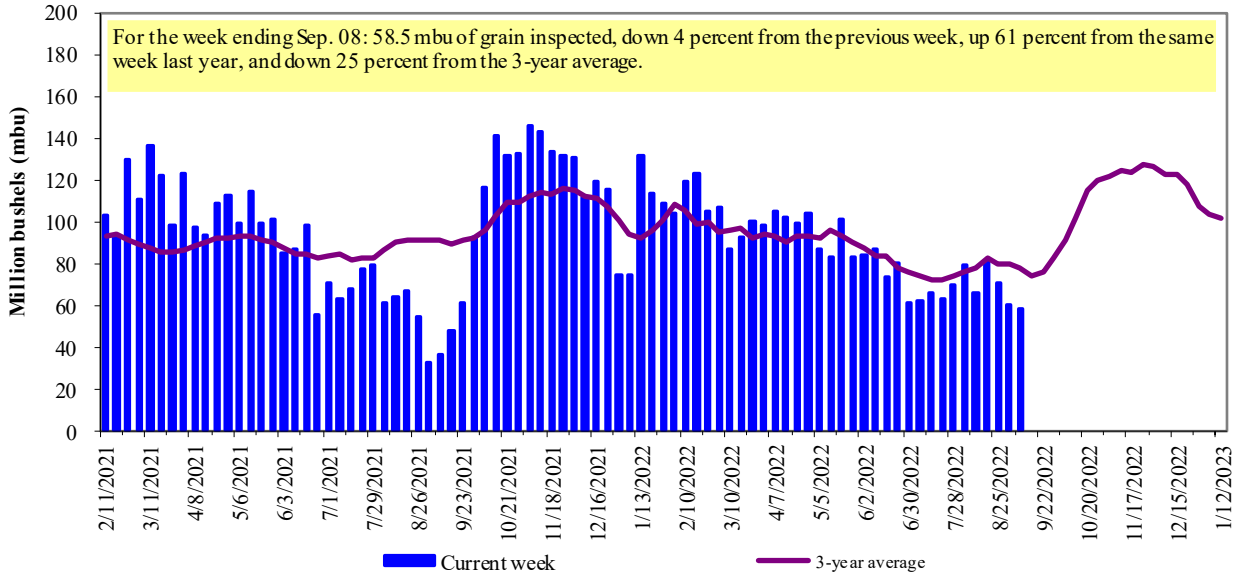
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

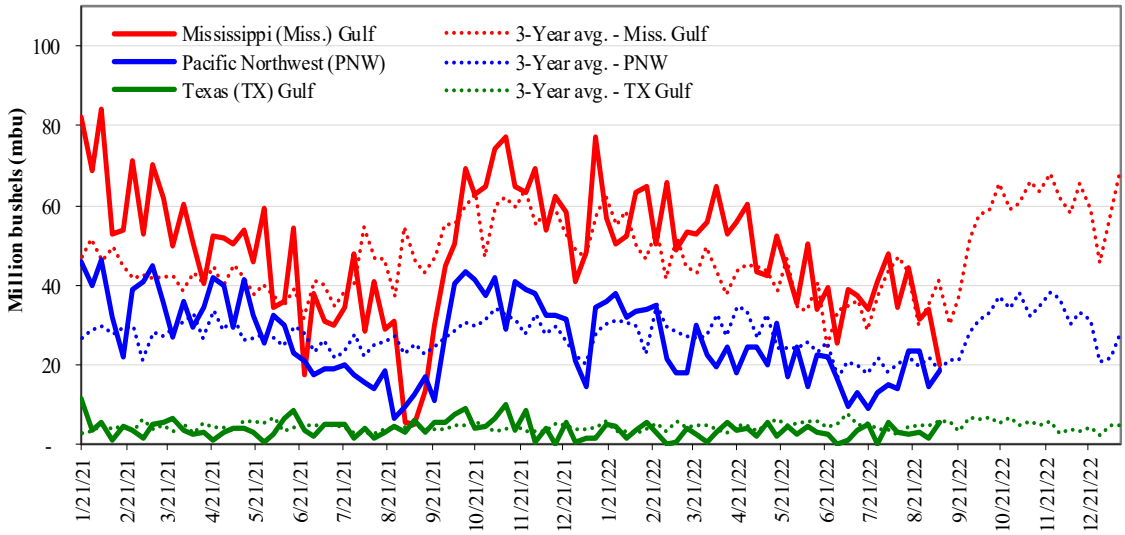


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 09/08/22 inspections (mbu):	
MS Gulf:	19.9
PNW:	18.3
TX Gulf:	5.6

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 41	up 298	down 28	up 26
Last Year (same wk):	up 303	down 11	up 128	up 46
3-yr avg. (4-wk. mov. Avg):	down 47	up 14	down 40	down 11

Source: USDA, Federal Grain Inspection Service.

Table 17

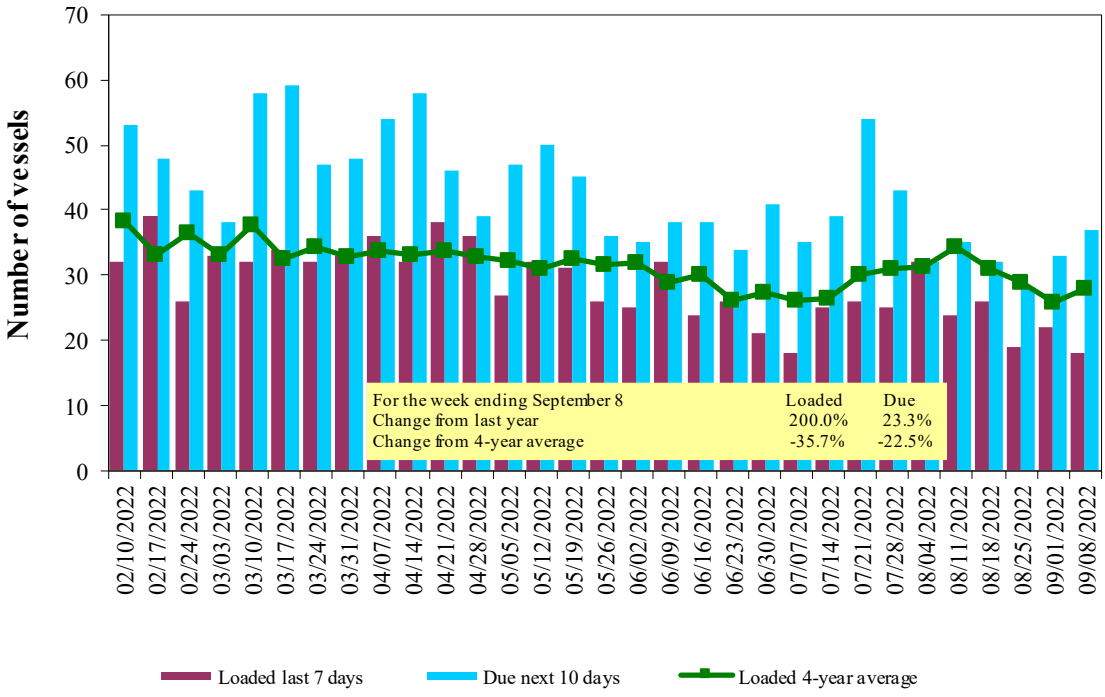
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
9/8/2022	22	18	37	11
9/1/2022	19	22	33	11
2021 range	(10…57)	(5...48)	(15...69)	(4…27)
2021 average	34	32	49	15

Source: USDA, Agricultural Marketing Service.

Figure 16

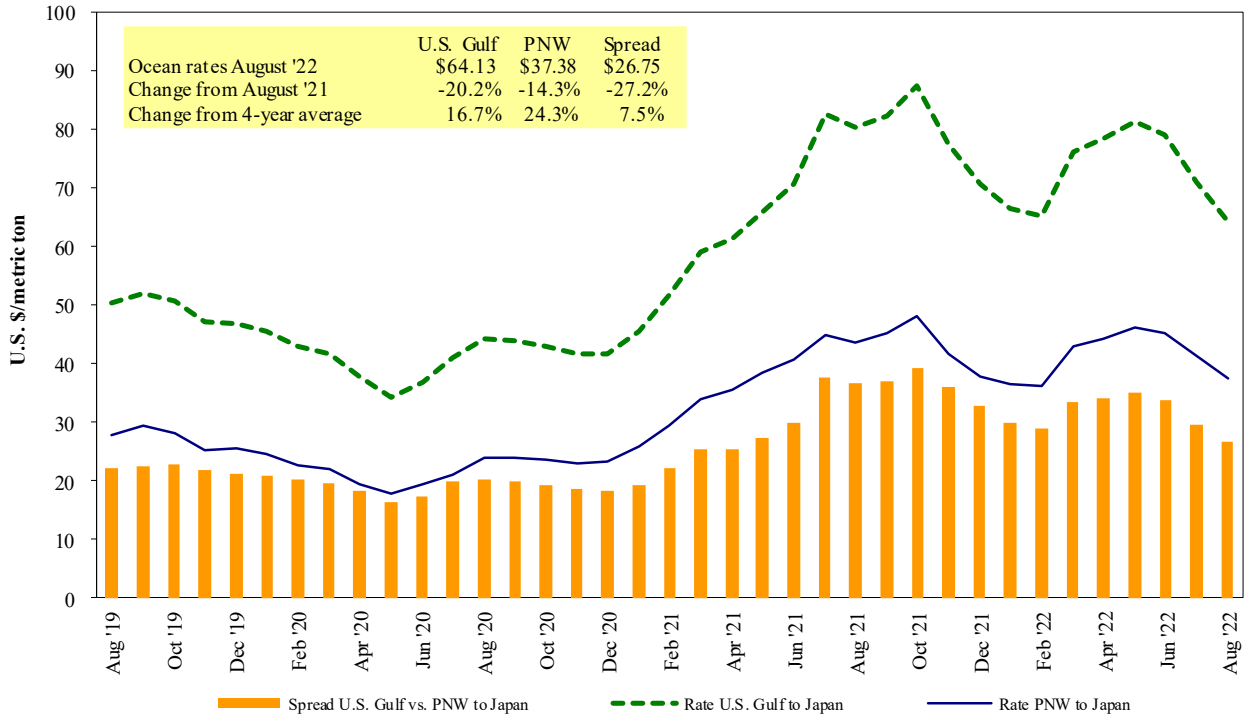
U.S. Gulf[1] vessel loading activity



[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 09/10/2022

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	Sorghum	Oct 5/15, 2022	13,920	94.08*
U.S. Gulf	Djibouti	Wheat	Sep 7/17, 2022	31,800	66.10*
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*
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.

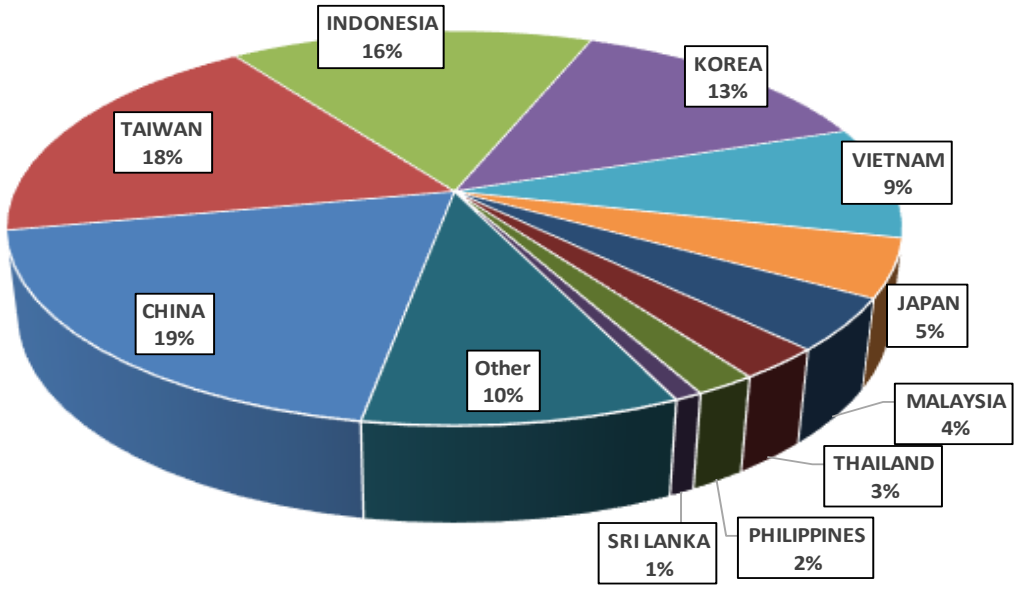
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

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-Jun 2022

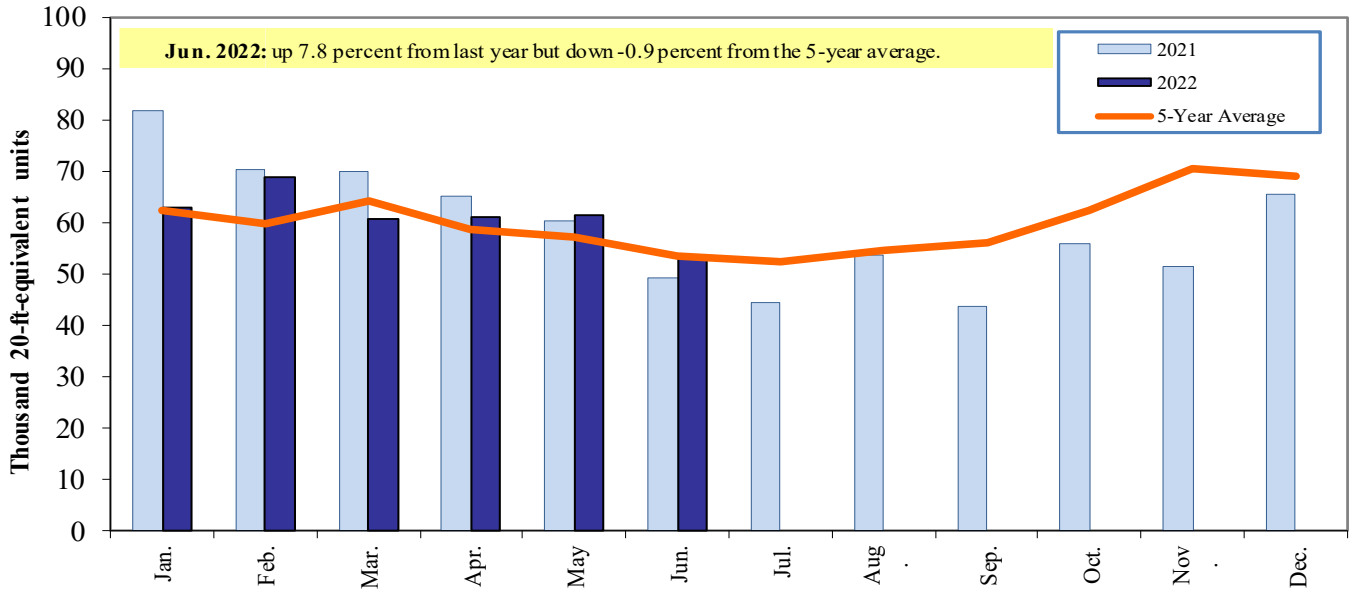


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210',

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: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '230330', '2304', and '230990'.

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

Contacts and Links

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

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