United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

Contact Us

December 1, 2022

Contents

The next release is December 8, 2022

WEEKLY HIGHLIGHTS

USDA Secretary Urges Congressional Action To Avert Rail Shutdown

On November 28, the USDA Secretary issued a statement on the possibility of an imminent nationwide rail stoppage. He expressed agreement with the President "in calling on Congress to quickly pass legislation adopting the Tentative Agreement between railroad workers and operators—without any modifications or delay—to avert a potentially crippling national rail shutdown." The Secretary also cautioned, "There is no time to waste on political gamesmanship or the search for a more perfect resolution." The press release further noted "A rail shutdown would have significant and long-lasting effects on some sectors of American food and agriculture and could be devastating to parts of our economy."

Diesel Price Drops for Third Week in a Row

Over the past 3 weeks, the **diesel fuel price** has fallen 19.2 cents. For the week ending November 28, the U.S. average diesel fuel price decreased 9.2 cents from the previous week to $5.141 per gallon—142.1 cents above the same week last year. The Midwest, the major grain-producing region, saw the largest decline of 12.4 cents per gallon. Last month, amid widespread fuel shortages, several Midwestern States had temporarily waived hours-of service (HOS) regulations for truck drivers hauling fuel. The waivers were intended to facilitate harvest-season transportation and prepare for cold weather. According to the Energy Information Administration's (EIA) *Short-Term Energy Outlook*, national retail diesel prices for the rest of fourth quarter 2022 are expected to average more than $5 per gallon (despite the recent price drops). EIA also projects diesel to average $5.12 per gallon in first quarter 2023. This month, EIA increased its national average diesel price projection by 8 percent for 2023, from $4.29 per gallon to $4.65 per gallon.

Ports of Long Beach, Oakland, and Portland Receive $101 Million for Upgrades

The Ports of Long Beach, Oakland, and Portland recently received funding for substantial upgrades through the Port Infrastructure Development Program, a discretionary grant program administered by the Department of Transportation's (DOT) Maritime Administration. The Port of Oakland received $36.6 million for several container-storage-related projects: an off-dock container support facility, refrigerated container storage and plugs, and grounded and wheeled container storage, among other projects. The Port of Long Beach received $30 million to buy 60 electric yard tractors, construct electric equipment charging infrastructure, and install software equipment to improve cargo-handling operations within the Middle Harbor Terminal. The Port of Portland received $24.4 million to reinforce foundation work for 9 acres of flexible cargo storage and 30 acres of container yard, among other improvements. The Port Infrastructure Development Program is funded by DOT appropriations from the $65 billion Infrastructure Investment and Jobs Act of 2021 and other sources.

FHWA Announces First Bridge Investment Program Grants

The U.S. Department of Transportation's Federal Highway Administration has awarded grants to 23 bridge construction projects in 23 states to help fund the projects' early planning phases. The grants will help communities modernize bridges, facilitating the efficient, reliable movement of goods throughout the country. Among the locations receiving grants were Iowa City, IA ($300,000); Gallatin County, IL ($48,000); and The City of Excelsior, MN ($269,600).

Snapshots by Sector

Export Sales

For the week ending November 17, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 36.05 million metric tons (mmt), down 25 percent from the same time last year and unchanged from last week. Net **corn export sales** for MY 2022/23 were 1.850 mmt, up 58 percent from last week. Net **soybean export sales** were 0.690 mmt, down 77 percent from last week. Net weekly **wheat export sales** were 0.512 mmt, up 76 percent from last week.

Rail

U.S. Class I railroads originated 26,624 **grain carloads** during the week ending November 19. This was a 11-percent increase from the previous week, 8 percent more than last year, and 11 percent more than the 3-year average.

Average December shuttle **secondary railcar** bids/offers (per car) were $445 above tariff for the week ending November 24. This was $218 more than last week and $63 lower than this week last year.

Barge

For the week ending November 26, **barged grain movements** totaled 750,550 tons. This was 11 percent less than the previous week and 10 percent more than the same period last year.

For the week ending November 26, 484 grain barges **moved down river**—131 fewer barges than last week. There were 731 grain barges **unloaded** in the New Orleans region, 12 percent fewer than last week.

Ocean

For the week ending November 24, 26 **oceangoing grain vessels** were loaded in the Gulf—24 percent more than the same period last year. Within the next 10 days (starting November 25), 39 vessels were expected to be loaded—35 percent more than the same period last year.

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Feature Article/Calendar

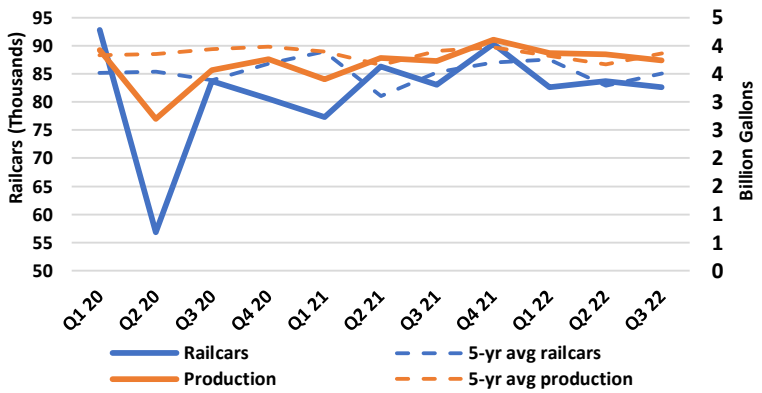
Year-to-Date Ethanol Transportation Update

Amid rail service issues, rising inflation, and high gasoline prices, ethanol production dropped in the first three quarters of 2022. After showing strong growth from third to fourth quarter 2021, U.S. ethanol production fell 6 percent to 3.9 billion gallons, from fourth quarter 2021 to first quarter 2022, and fell again in the next two quarters. Despite flagging production, ethanol exports have stayed strong. Exports to major buyers of U.S. ethanol rose sharply in first quarter 2022 and continued to increase in the second quarter. Despite declining in the third quarter 2022, exports still surpassed third quarter 2021. This article examines year-to-date trends in ethanol production and exports and their effects on demand for transporting ethanol. Also considered are projections for ethanol production and exports and what lies in store for future transportation demand.

Ethanol Production and Rail Movements

A combination of lower profit margins, winter weather, and rail logistical obstacles reduced ethanol production in the first and second quarters of 2022.[1] Reflecting low first-quarter production, Class I rail movements of ethanol fell 9 percent, from 90,353 carloads in fourth quarter 2021 to 82,646 carloads in first quarter 2022. However, first-quarter 2022 carloads were still 7 percent above first quarter 2021. Even with a 1-percent decline from first to second quarter 2022, second-quarter ethanol production was still 2 percent above the same time last year and 5 percent above the prior-5-year average. Second-quarter rail shipments of ethanol rose to 83,691carloads—1 percent above the first quarter, 3 percent below second quarter 2021, and 1 percent above the 5-year average. Despite improving profit margins, ethanol production fell again in the third quarter by 3 percent amid recession fears, low gasoline demand, and volatility in the U.S. capital markets (fig. 1). In line with falling ethanol production, third quarter ethanol rail movements also declined by 1 percent.

Figure 1: Quarterly ethanol rail shipments and production



Note: Q=quarter; yr=year;avg=average

Source: Energy Information Administration.

Ethanol Export Trends and Effects on Port Activity

Large purchases by major importing countries sustained the demand for ethanol transportation in the first half of 2022.[2] According to Foreign Agricultural Service (FAS) data, from fourth quarter 2021 to first quarter 2022, U.S. ethanol exports rose 8 percent, mainly because of higher purchases from India and South Korea and strong purchases from Canada. Despite increased U.S. exports to South Korea and India, first-quarter 2022 U.S. exports were 1 percent below first quarter 2021 and 11 percent behind the 5-year average because of low exports to China. Then, from first quarter 2022 to second quarter 2022, U.S. exports increased 11 percent, mainly because of higher exports to Canada and Brazil. At almost 434 million gallons, second-quarter 2022 ethanol exports were up 63 percent from second quarter 2021 and up 39 percent from the 5-year average. In third quarter 2022, ethanol exports dropped 34 percent because of reduced exports to India, South Korea, and Brazil, but were still up 36 percent from the same period in 2021.

Top and emerging ethanol importers. In the first three quarters of 2022, Canada, South Korea, and India were the top three ethanol importers, accounting for 52 percent of U.S. ethanol exports. In the first three quarters of 2022, exports to Canada were consistently strong as gasoline demand rose following relaxed COVID-19 restrictions. Canada's share of U.S. ethanol exports increased from 26 percent in first quarter 2022 to 48 percent in third quarter 2022. Of the top three importers, Canada was the only one whose imports increased in the first three quarters of 2022. Both South Korea's and India's imports dropped in third quarter 2022. After strong growth (91 percent) from fourth quarter 2021 to first quarter 2022, South Korea's ethanol imports rose just 2 percent in the second quarter 2022 and dropped 51 percent in the third quarter 2022. India's imports rose 26 percent from fourth quarter 2021 to first quarter 2022. Then, from first to second quarter 2022, India's imports dropped 61 percent—from over 58 million gallons to just under 23 million gallons. From second quarter to third quarter 2022, India's imports dropped to just under 15,000 gallons.[3]

[1] Some producers reported onsite storage capacity issues, forcing them to reduce ethanol production until rail cars could be made available.

[2] "Ethanol transportation" refers to transportation used to convey ethanol—not transportation powered by ethanol.

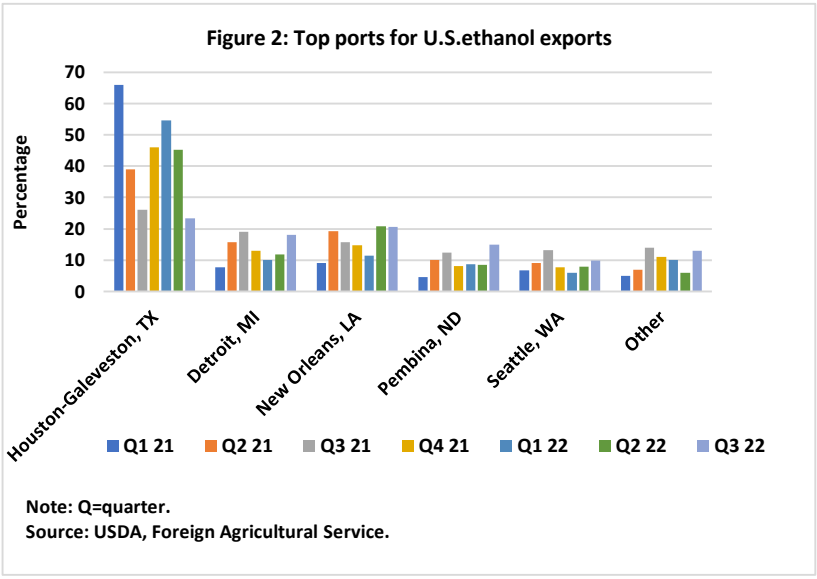
[3] Despite India's "E20" goal for biofuel in 2018, the country's imported ethanol is prohibited from being used for fuel blending. Thus, India's ethanol imports mainly supported the industrial, non-alcoholic beverage, and medical grade sectors.

Changing dynamics of top importers. After importing over 100 million gallons of U.S. ethanol in the first three quarters of 2021, China has imported very little in 2022—just under 400,000 gallons for the first three quarters of 2022. With profits constrained by high Chinese corn prices, China's low ethanol production would seem to open demand for ethanol imports. However, China's high tariffs and rising international shipping costs make ethanol imports unviable. According to FAS, China's biofuels policy continues to wane as a government priority, and investment in the sector has declined.

Despite the elimination of Brazil's duty on ethanol imports, U.S. ethanol exports to Brazil have been tempered by a weak Brazilian real, reduced demand from inflation, and prioritization of ethanol production over sugar.[4] After declining 44 percent from fourth quarter 2021 to first quarter 2022, Brazil's ethanol imports rose 75 percent (from 21.6 million gallons to 37.8 million gallons) from first to second quarter 2022. However, imports decreased sharply from the second to third quarter, to just under 31,000 gallons.

Meanwhile, as the United Kingdom (UK) moved to adopt a 10-percent ethanol "E10" blend of gasoline, the UK emerged as the fourth largest importer by third quarter 2022—despite a drop in its imports from second quarter to third quarter 2022—surpassing Brazil. From third quarter 2021 to second quarter 2022, export volume to the UK more than doubled, following the UK's move to 10-percent blending in September 2021.

Changing port activity. The share of all U.S. ethanol exports to leave through the Port of Houston, TX—the top port of exit for all U.S. ethanol exports—rose from 46 percent in fourth quarter 2021 to 55 percent in first quarter 2022. The rise was due to a sharp increase in exports to India and South Korea. Ethanol exports to South Korea and India accounted for 46 percent of the Port of Houston's activity in first quarter 2022. In second quarter 2022, the port's share fell to 45 percent, as exports to India and South Korea fell. In third quarter 2022, the port's share fell to just 23 percent, mainly because ethanol exports from the Port of Houston to South Korea declined further and exports to India ceased completely. From first quarter 2022 to second quarter 2022, the Port of New Orleans saw its share double with increased exports to the UK and Canada (fig. 2).



Note: Q=quarter.
Source: USDA, Foreign Agricultural Service.

Looking Ahead

According to the Energy Information Administration's (EIA) November 2022 *Short Term Energy Outlook*, the average 2022 fuel ethanol blend rate is forecast at a record 10.4 percent. EIA projects ethanol production will average 990,000 barrels per day in 2023, down from 1 million barrels per day in 2022. From marketing year (MY) 2021/22 to MY 2022/23, use of corn for ethanol is projected to decrease by 5 percent, according to USDA's November 2022 *World Agricultural Supply and Demand Estimates* report. Fiscal year (FY) 2023 U.S. ethanol exports are forecast at $4.2 billion, same as the FY 2022 forecast. High corn and gasoline prices are expected to keep ethanol export prices near their historic high. Despite high export prices, a strong U.S. dollar, and the threat of recession in many markets, U.S. ethanol export volumes may rise moderately.

Canada is expected to remain the top buyer for U.S. ethanol exports. Brazil's demand for U.S. ethanol is expected to be constrained by a weak Brazilian real against the U.S. dollar, as well as by reduced Brazil gasoline-ethanol use in 2023 (as forecast by the International Energy Agency). Similarly, competitive prices for U.S. ethanol are expected to keep exports of industrial ethanol to top markets strong—most importantly, South Korea, India, and Mexico. Amid higher gasoline prices, EU demand is strong for U.S. ethanol, which is comparatively cheap, despite high duties. However, a rail strike on December 9 (if it occurs), would significantly impact ethanol rail movements. More than 70 percent of U.S.-produced ethanol is transported by rail, including U.S. ethanol exports to Canada and Mexico.

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[4] On March 21, the Government of Brazil decided to suspend the import tariff on ethanol until December 2022 to help moderate rising gasoline prices.

Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
11/30/22	351	335	281	522	N/A	N/A
11/23/22	351	335	272	524	259	236

[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.

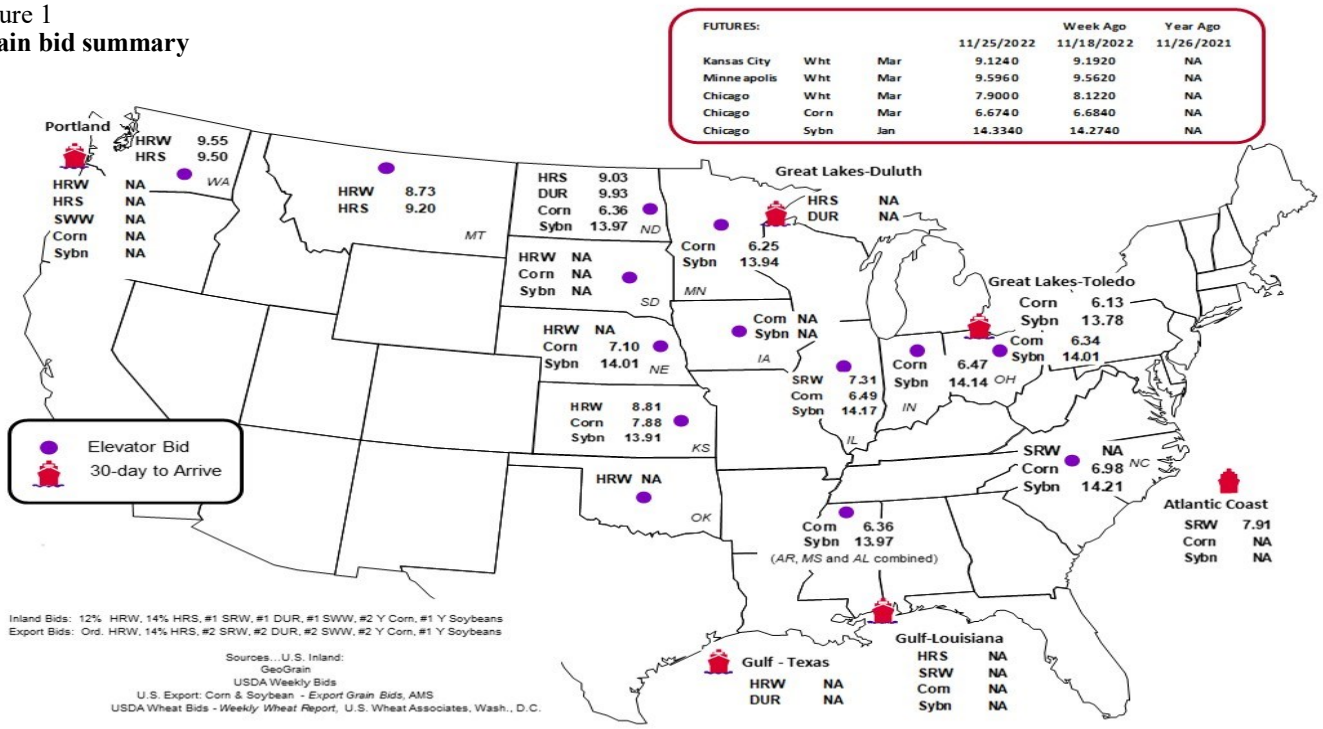
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	11/25/2022	11/18/2022
Corn	IL–Gulf	NA	-1.51
Corn	NE–Gulf	NA	-0.86
Soybean	IA–Gulf	NA	-1.86
HRW	KS–Gulf	NA	-2.43
HRS	ND–Portland	NA	-2.34

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

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

For the week ending:	East		West			U.S. total	Canada	
11/19/2022	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,373	2,999	13,635	1,506	6,111	26,624	6,790	6,146
This week last year	1,836	1,987	12,815	1,383	6,564	24,585	3,831	4,207
2022 YTD	81,369	112,549	509,151	58,566	265,702	1,027,337	180,281	181,441
2021 YTD	82,328	107,652	537,861	56,125	283,618	1,067,584	188,632	218,685
2022 YTD as % of 2021 YTD	99	105	95	104	94	96	96	83
Last 4 weeks as % of 2021*	103	145	98	111	96	103	143	123
Last 4 weeks as % of 3-yr. avg.**	111	120	100	118	101	104	126	112
Total 2021	93,935	120,707	609,890	64,818	318,002	1,207,352	209,781	242,533

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

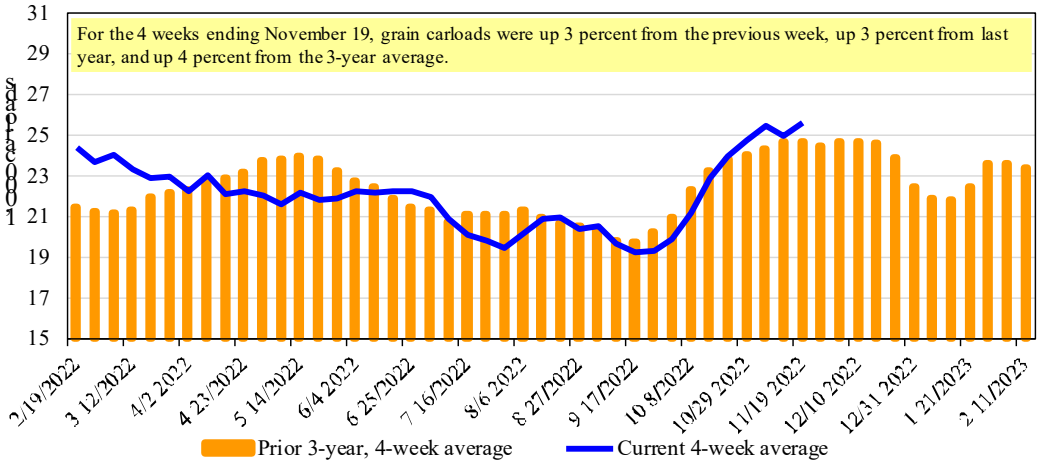
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 2

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 4

Railcar auction offerings[1] ($/car)[2]

For the week ending:		Delivery period							
11/24/2022		Jan-23	Jan-22	Feb-23	Feb-22	Mar-23	Mar-22	Apr-23	Apr-22
BNSF[3]	COT grain units	n/a	0	n/a	0	n/a	no bids	n/a	n/a
	COT grain single-car	n/a	0	n/a	0	n/a	no bids	n/a	n/a
UP[4]	GCAS/Region 1	n/a	no offer	n/a	no offer	n/a	n/a	n/a	n/a
	GCAS/Region 2	n/a	no offer	n/a	no offer	n/a	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.

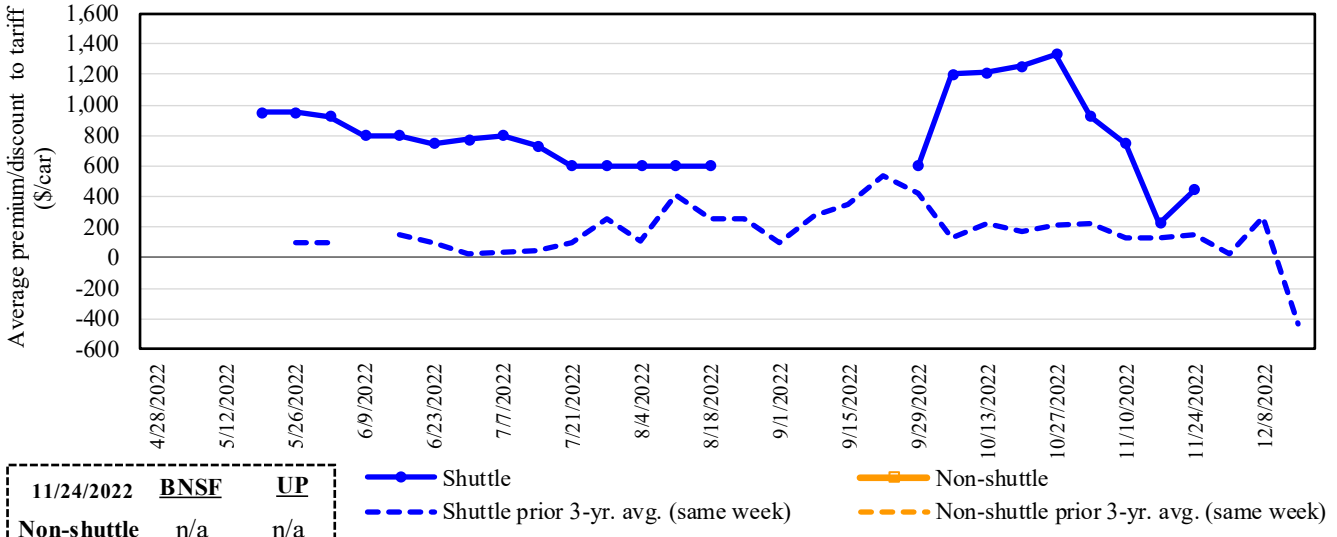
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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 3

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



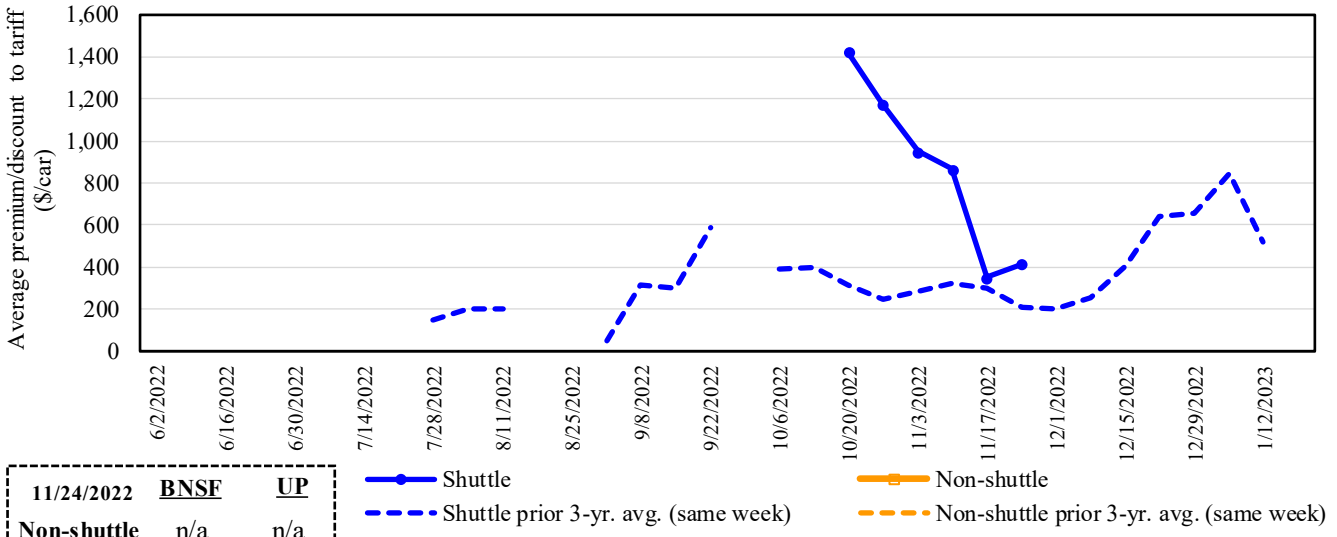
11/24/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$390	$500

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $218 this week and are $886 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 4

Secondary market bids/offers for railcars to be delivered in January 2023



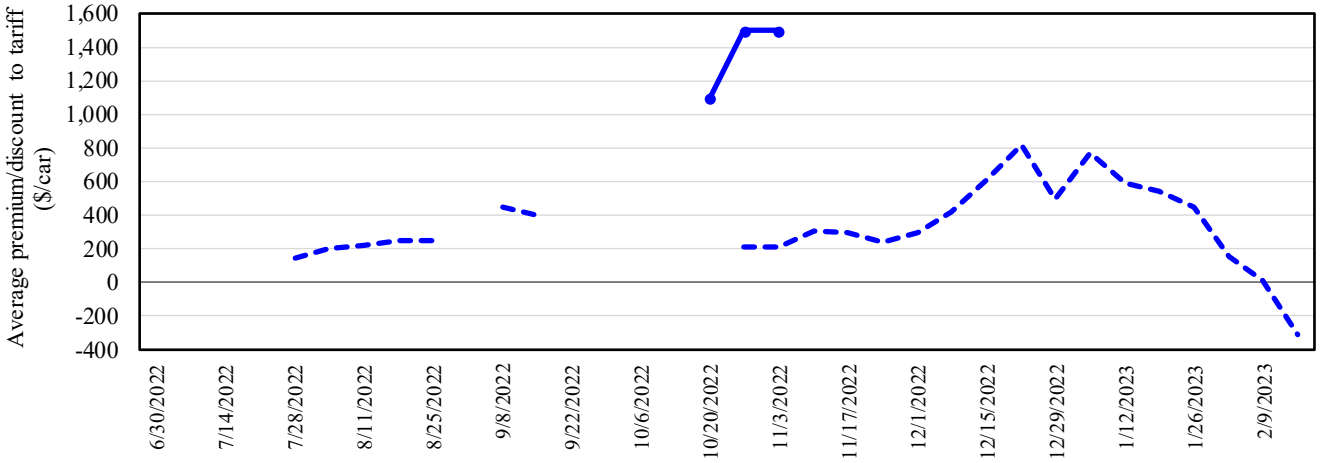
11/24/2022	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$533	$300

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $67 this week and are $1,008 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 February 2023



11/24/2022	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 5

Weekly secondary railcar market ($/car)[1]

For the week ending: 11/24/2022		Delivery period					
		Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-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**	**390**	**533**	**n/a**	**200**	**n/a**	**(150)**
	Change from last week	212	183	n/a	n/a	n/a	0
	Change from same week 2021	(14)	83	n/a	n/a	n/a	n/a
	UP-Pool	**500**	**300**	**n/a**	**700**	**n/a**	**n/a**
	Change from last week	225	n/a	n/a	n/a	n/a	n/a
	Change from same week 2021	(111)	0	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 6

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

December 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	$319	$39.86	$1.08	4
	Grand Forks, ND	Duluth-Superior, MN	$3,858	$149	$39.79	$1.08	10
	Wichita, KS	Los Angeles, CA	$7,490	$765	$81.98	$2.23	13
	Wichita, KS	New Orleans, LA	$4,600	$561	$51.25	$1.39	7
	Sioux Falls, SD	Galveston-Houston, TX	$7,226	$628	$77.99	$2.12	12
	Colby, KS	Galveston-Houston, TX	$4,850	$614	$54.26	$1.48	7
	Amarillo, TX	Los Angeles, CA	$5,121	$855	$59.34	$1.62	7
Corn	Champaign-Urbana, IL	New Orleans, LA	$4,000	$634	$46.02	$1.17	7
	Toledo, OH	Raleigh, NC	$8,551	$697	$91.83	$2.33	14
	Des Moines, IA	Davenport, IA	$2,655	$134	$27.70	$0.70	8
	Indianapolis, IN	Atlanta, GA	$6,593	$523	$70.67	$1.80	14
	Indianapolis, IN	Knoxville, TN	$5,564	$339	$58.62	$1.49	12
	Des Moines, IA	Little Rock, AR	$4,250	$394	$46.12	$1.17	10
	Des Moines, IA	Los Angeles, CA	$6,130	$1,148	$72.28	$1.84	12
Soybeans	Minneapolis, MN	New Orleans, LA	$5,431	$984	$63.71	$1.73	59
	Toledo, OH	Huntsville, AL	$7,037	$497	$74.81	$2.04	12
	Indianapolis, IN	Raleigh, NC	$7,843	$706	$84.90	$2.31	15
	Indianapolis, IN	Huntsville, AL	$5,689	$335	$59.82	$1.63	12
	Champaign-Urbana, IL	New Orleans, LA	$4,865	$634	$54.61	$1.49	8
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,393	$440	$47.99	$1.31	15
	Wichita, KS	Galveston-Houston, TX	$4,311	$343	$46.21	$1.26	5
	Chicago, IL	Albany, NY	$7,090	$658	$76.94	$2.09	16
	Grand Forks, ND	Portland, OR	$6,051	$760	$67.64	$1.84	16
	Grand Forks, ND	Galveston-Houston, TX	$5,399	$792	$61.47	$1.67	8
	Colby, KS	Portland, OR	$5,923	$1,007	$68.82	$1.87	6
Corn	Minneapolis, MN	Portland, OR	$5,660	$926	$65.40	$1.66	22
	Sioux Falls, SD	Tacoma, WA	$5,620	$848	$64.23	$1.63	21
	Champaign-Urbana, IL	New Orleans, LA	$4,170	$634	$47.70	$1.21	13
	Lincoln, NE	Galveston-Houston, TX	$4,360	$494	$48.20	$1.22	19
	Des Moines, IA	Amarillo, TX	$4,670	$496	$51.30	$1.30	10
	Minneapolis, MN	Tacoma, WA	$5,660	$918	$65.32	$1.66	22
	Council Bluffs, IA	Stockton, CA	$5,580	$950	$64.84	$1.65	23
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,350	$848	$71.47	$1.95	19
	Minneapolis, MN	Portland, OR	$6,400	$926	$72.75	$1.98	20
	Fargo, ND	Tacoma, WA	$6,250	$754	$69.55	$1.89	18
	Council Bluffs, IA	New Orleans, LA	$5,095	$731	$57.85	$1.57	9
	Toledo, OH	Huntsville, AL	$5,277	$497	$57.33	$1.56	17
	Grand Island, NE	Portland, OR	$5,730	$1,031	$67.14	$1.83	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 7

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.

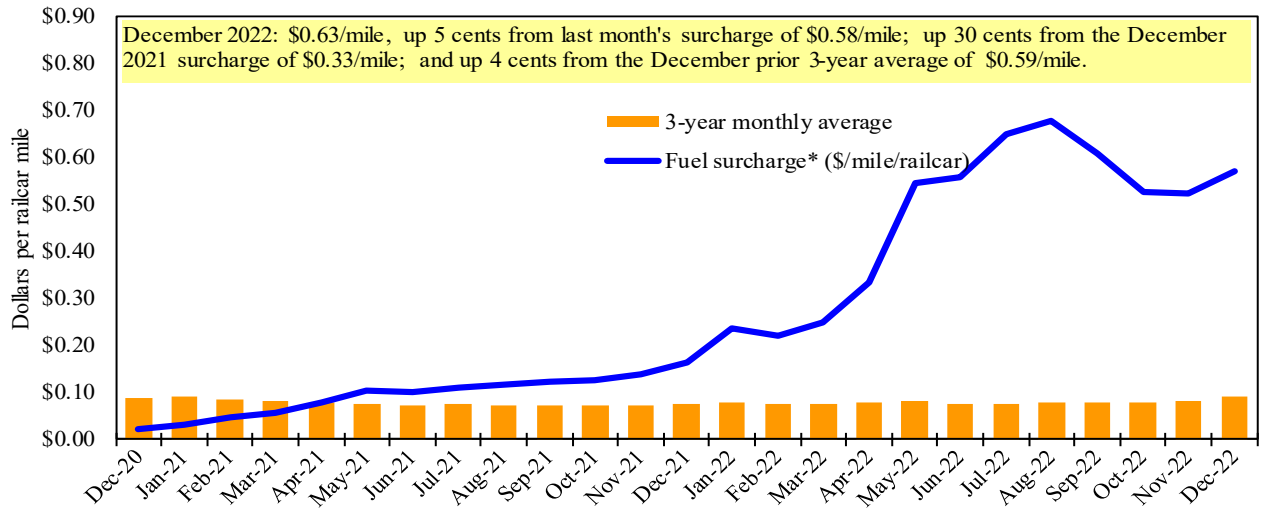
[5] As of January 1, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico.

As we incorporate the change, Table 7 updates will be delayed.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

Figure 6

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.

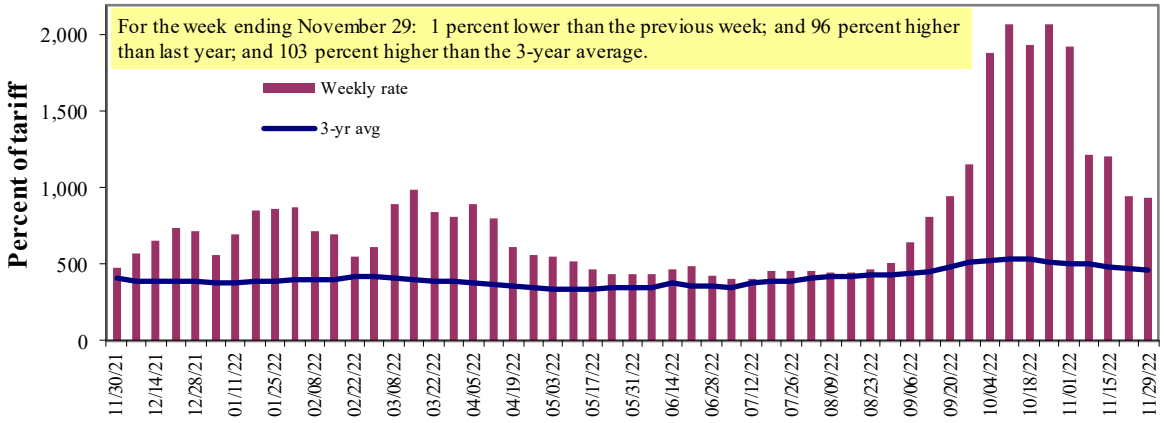
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 7

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 8

Weekly barge freight rates: Southbound only

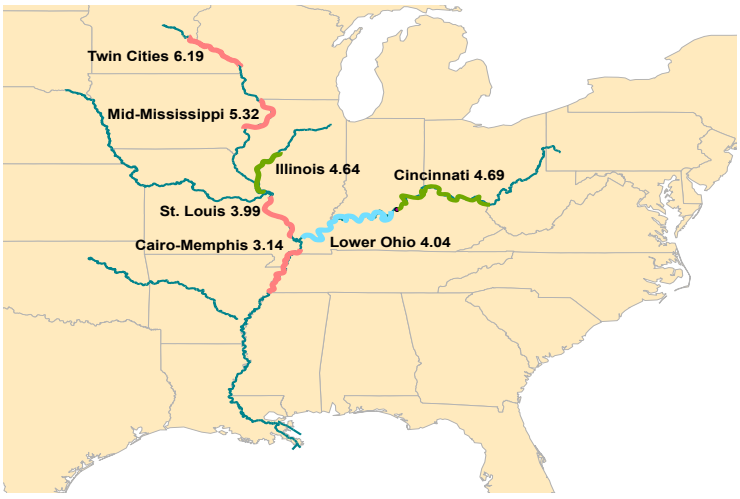
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	11/29/2022	-	843	939	842	892	892	741
	11/22/2022	-	943	944	850	943	943	821
$/ton	11/29/2022	-	44.85	43.57	33.60	41.83	36.04	23.27
	11/22/2022	-	50.17	43.80	33.92	44.23	38.10	25.78
Current week % change from the same week:								
	Last year	-	74	96	125	86	86	115
	3-year avg. [2]	-	82	103	130	108	108	117
Rate[1]	December	-	-	897	806	844	844	725
	February	-	-	850	697	722	722	630

[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 8
Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

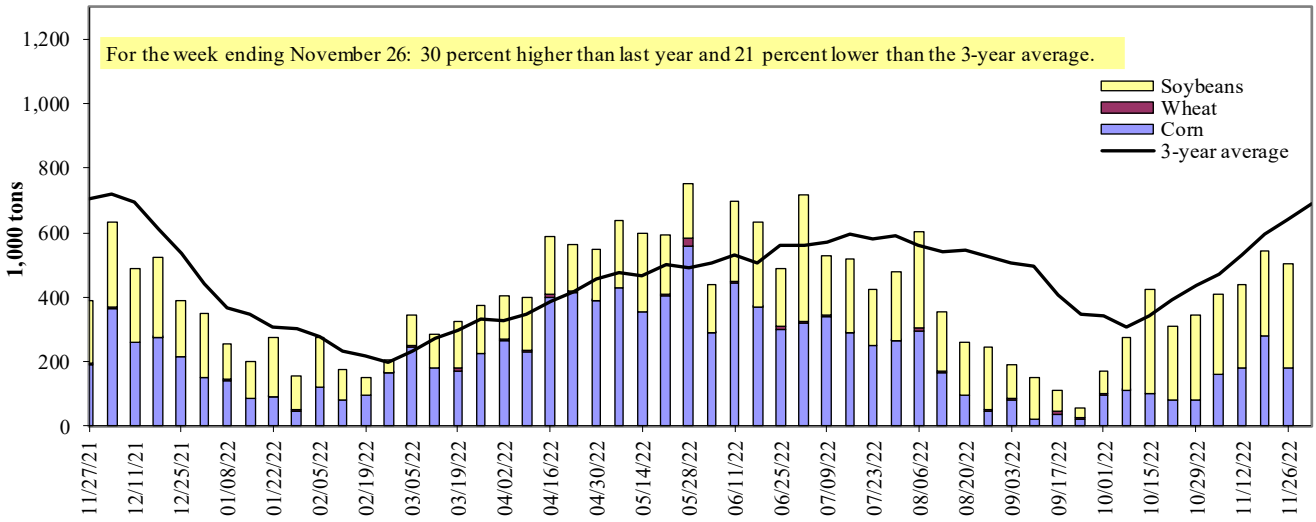
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



Map Credit: USDA, Agricultural Marketing Service

Figure 9

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 9

Barge grain movements (1,000 tons)

For the week ending 11/26/2022	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	79	0	89	0	167
Winfield, MO (L25)	118	0	172	0	290
Alton, IL (L26)	177	0	323	0	499
Granite City, IL (L27)	182	0	323	0	504
Illinois River (La Grange)	74	0	120	0	195
Ohio River (Olmsted)	68	0	151	0	219
Arkansas River (L1)	0	1	26	0	27
Weekly total - 2022	250	1	500	0	751
Weekly total - 2021	294	14	369	7	684
2022 YTD[1]	15,193	1,501	12,410	227	29,331
2021 YTD[1]	21,732	1,543	9,468	252	32,994
2022 as % of 2021 YTD	70	97	131	90	89
Last 4 weeks as % of 2021[2]	85	3	103	267	94
Total 2021	23,516	1,634	11,325	297	36,772

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

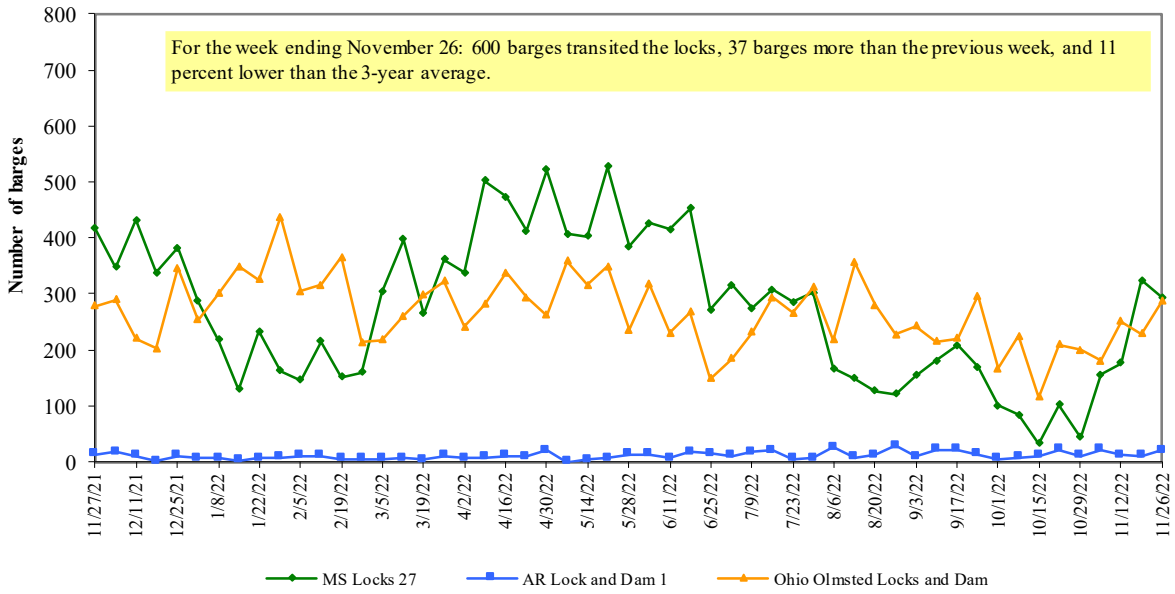
[2] As a percent of same period in 2021.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Figure 10

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

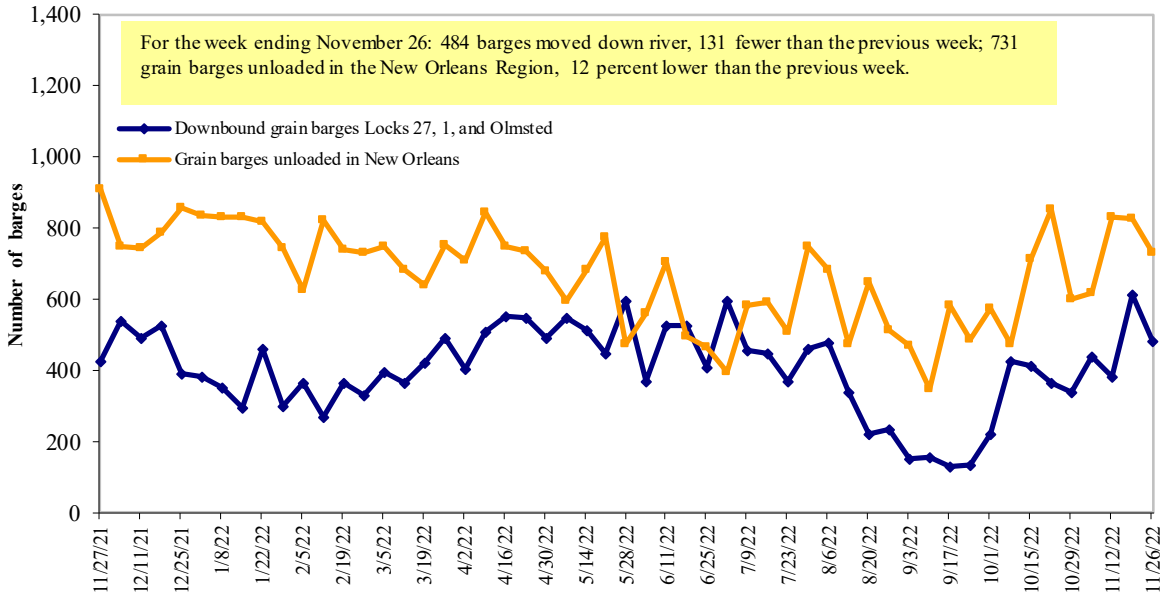


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Figure 11

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 10

Retail on-highway diesel prices, week ending 11/28/2022 (U.S. $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	5.336	-0.075	1.652
	New England	5.860	-0.103	2.194
	Central Atlantic	5.876	-0.065	2.031
	Lower Atlantic	5.088	-0.090	1.502
II	Midwest	5.108	-0.123	1.506
III	Gulf Coast	4.699	-0.083	1.245
IV	Rocky Mountain	5.392	-0.046	1.568
V	West Coast	5.666	-0.078	1.216
	West Coast less California	5.369	-0.061	1.337
	California	6.006	-0.099	1.188
Total	United States	5.141	-0.092	1.421

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

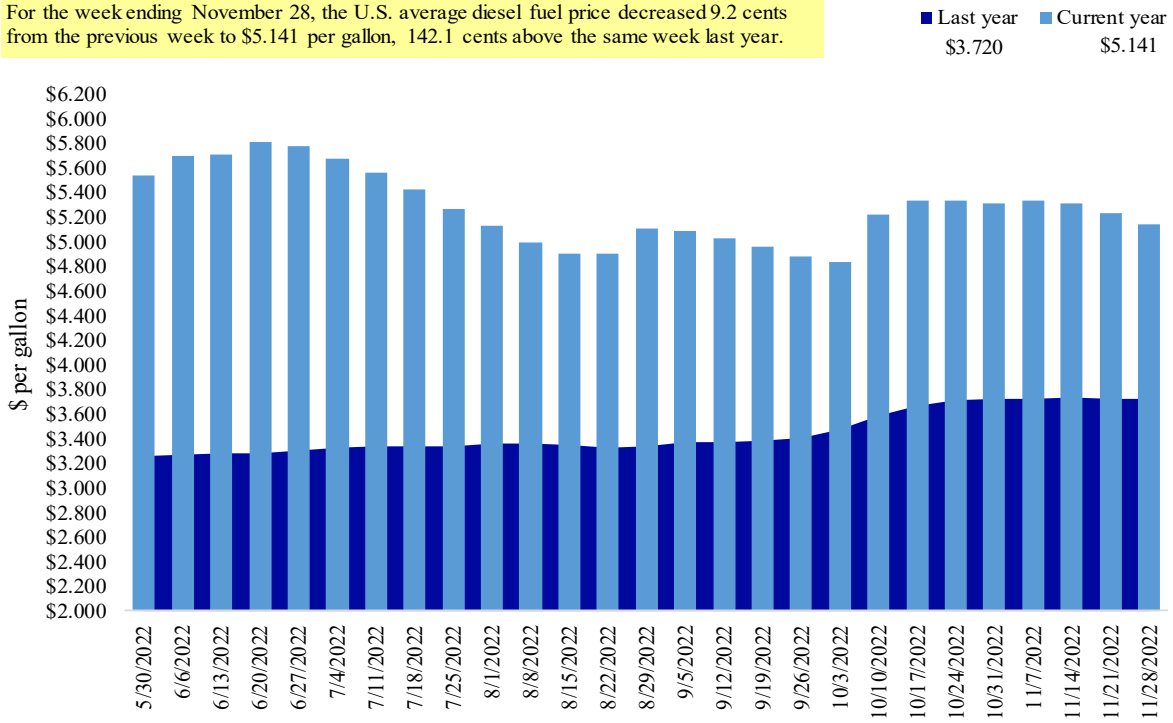
Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

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

Figure 12

Weekly diesel fuel prices, U.S. average

For the week ending November 28, the U.S. average diesel fuel price decreased 9.2 cents from the previous week to $5.141 per gallon, 142.1 cents above the same week last year.



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 11

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]									
11/17/2022	892	525	1,480	1,093	84	4,073	12,321	19,656	36,049
This week year ago	2,028	602	1,280	823	53	4,786	25,701	17,360	47,848
Cumulative exports-marketing year[2]									
2022/23 YTD	2,709	1,678	2,641	2,119	78	9,224	5,429	16,949	31,601
2021/22 YTD	3,612	1,456	2,557	1,733	97	9,454	8,708	18,743	36,906
YTD 2022/23 as % of 2021/22	75	115	103	122	80	98	62	90	86
Last 4 wks. as % of same period 2021/22	43	85	95	121	128	77	43	121	74
Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622
Total 2020/21	8,422	1,790	7,500	6,438	656	24,807	66,958	60,571	152,335

[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 12

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

For the week ending 11/17/2022	Total commitments[2] 2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
		1,000 mt -		
Mexico	8679.2	9,724	(11)	15,227
China	3500	12,003	(71)	12,616
Japan	1457	2,964	(51)	10,273
Columbia	279	1,806	(85)	4,398
Korea	19	72	(74)	2,563
Top 5 importers	**13,934**	**26,570**	(48)	**45,077**
Total U.S. corn export sales	**17,750**	**34,409**	(48)	**56,665**
% of projected exports	32%	55%		
Change from prior week[2]	**1,850**	**1,429**		
Top 5 importers' share of U.S. corn export sales	79%	77%		80%
USDA forecast November 2022	**54,707**	**62,875**	(13)	
Corn use for ethanol USDA forecast, November 2022	**133,985**	**135,281**	(1)	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; 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 13

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

For the week ending 11/17/2022	Total commitments[2] 2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
				- 1,000 mt -
China	21,675	19,731	10	27,283
Mexico	2,913	2,503	16	4,929
Egypt	714	1,388	(49)	3,553
Japan	1,113	974	14	2,266
Indonesia	440	506	(13)	2,116
Top 5 importers	**26,855**	**25,101**	7	**40,147**
Total U.S. soybean export sales	**36,604**	**36,104**	1	**54,231**
% of projected exports	66%	61%		
change from prior week[2]	**690**	**1,565**		
Top 5 importers' share of U.S. soybean export sales	73%	70%		**74%**
USDA forecast, November 2022	**55,722**	**58,801**	(5)	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; 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 14

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

For the week ending 11/17/2022	Total Commitments[2] 2022/23 current MY	2021/22 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
	1,000 mt -			- 1,000 mt -
Mexico	2,264	2,514	(10)	3,566
Philippines	1,681	2,151	(22)	2,985
Japan	1,423	1,577	(10)	2,453
China	616	848	(27)	1,537
Nigeria	605	1,566	(61)	1,528
Korea	881	858	3	1,459
Taiwan	500	597	(16)	1,106
Indonesia	299	67	345	711
Thailand	499	375	33	703
Colombia	406	409	(1)	621
Top 10 importers	**9,174**	**10,961**	(16)	**16,669**
Total U.S. wheat export sales	**13,296**	**14,241**	(7)	**22,763**
% of projected exports	63%	65%		
change from prior week[2]	**512**	**568**		
Top 10 importers' share of U.S. wheat export sales	69%	77%		73%
USDA forecast, November 2022	**21,117**	**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.

Table 15

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

Port regions	For the week ending 11/24/22	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	16	167	10	9,072	12,714	71	76	48	13,243
Corn	0	0	n/a	8,954	12,430	72	2	1	13,420
Soybeans	498	847	59	11,751	11,917	99	84	104	14,540
Total	**515**	**1,014**	**51**	**29,777**	**37,061**	**80**	**81**	**86**	**41,203**
Mississippi Gulf									
Wheat	28	0	n/a	3,978	3,049	130	24	30	3,202
Corn	138	320	43	28,719	36,467	79	39	45	38,498
Soybeans	1,301	1,292	101	25,612	21,751	118	96	101	27,159
Total	**1,467**	**1,612**	**91**	**58,309**	**61,267**	**95**	**78**	**84**	**68,858**
Texas Gulf									
Wheat	67	88	76	3,199	3,670	87	81	90	3,888
Corn	0	0	n/a	593	570	104	32	49	627
Soybeans	0	35	0	432	1,581	27	48	71	1,611
Total	**67**	**123**	**54**	**4,224**	**5,822**	**73**	**57**	**77**	**6,126**
Interior									
Wheat	57	50	113	2,605	2,734	95	81	92	2,973
Corn	159	170	93	8,015	9,077	88	78	89	10,157
Soybeans	77	206	37	6,260	5,792	108	85	86	6,525
Total	**292**	**427**	**69**	**16,881**	**17,602**	**96**	**81**	**88**	**19,656**
Great Lakes									
Wheat	41	1	n/a	328	432	76	73	44	536
Corn	0	0	n/a	148	114	129	0	0	145
Soybeans	48	26	183	590	552	107	65	92	592
Total	**89**	**28**	**321**	**1,065**	**1,098**	**97**	**62**	**73**	**1,273**
Atlantic									
Wheat	0	0	n/a	168	125	135	n/a	0	128
Corn	0	0	n/a	286	81	351	n/a	n/a	85
Soybeans	143	92	156	2,345	1,751	134	126	160	2,184
Total	**143**	**92**	**156**	**2,798**	**1,957**	**143**	**128**	**157**	**2,397**
U.S. total from ports*									
Wheat	209	307	68	19,350	22,723	85	68	56	23,969
Corn	297	490	61	46,715	58,739	80	50	54	62,932
Soybeans	2,067	2,498	83	46,990	43,345	108	89	102	52,612
Total	**2,573**	**3,295**	**78**	**113,055**	**124,807**	**91**	**79**	**86**	**139,512**

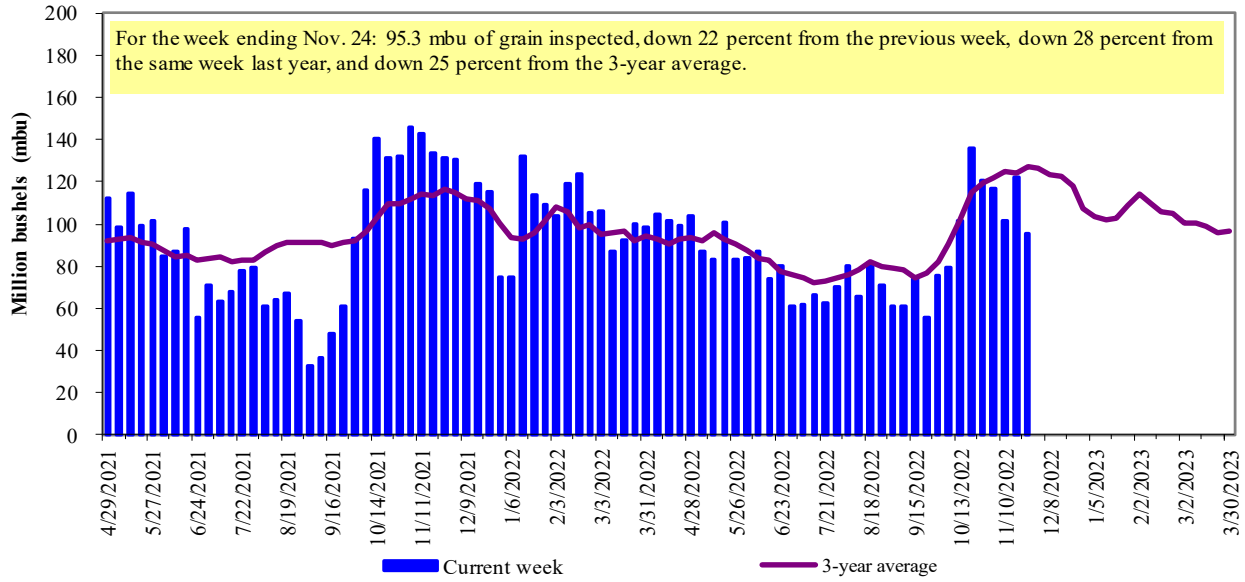
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 13

U.S. grain inspected for export (wheat, corn, and soybeans)

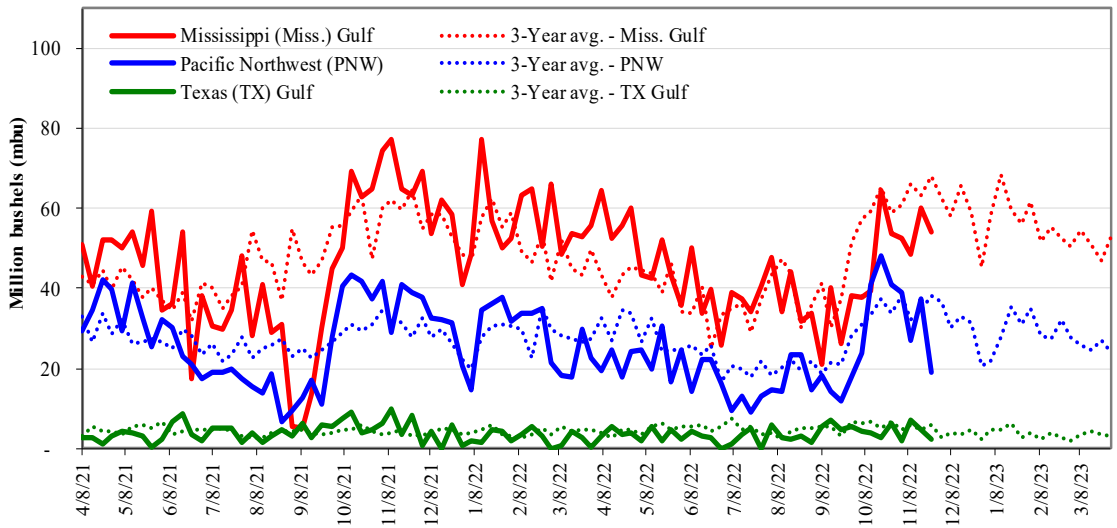


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 11/24/22 inspections (mbu):	
MS Gulf:	54.3
PNW:	18.9
TX Gulf:	2.4

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 10	down 46	down 12	down 49
Last Year (same wk):	down 14	down 71	down 21	down 51
3-yr avg. (4-wk. mov. Avg):	down 16	down 53	down 19	down 47

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

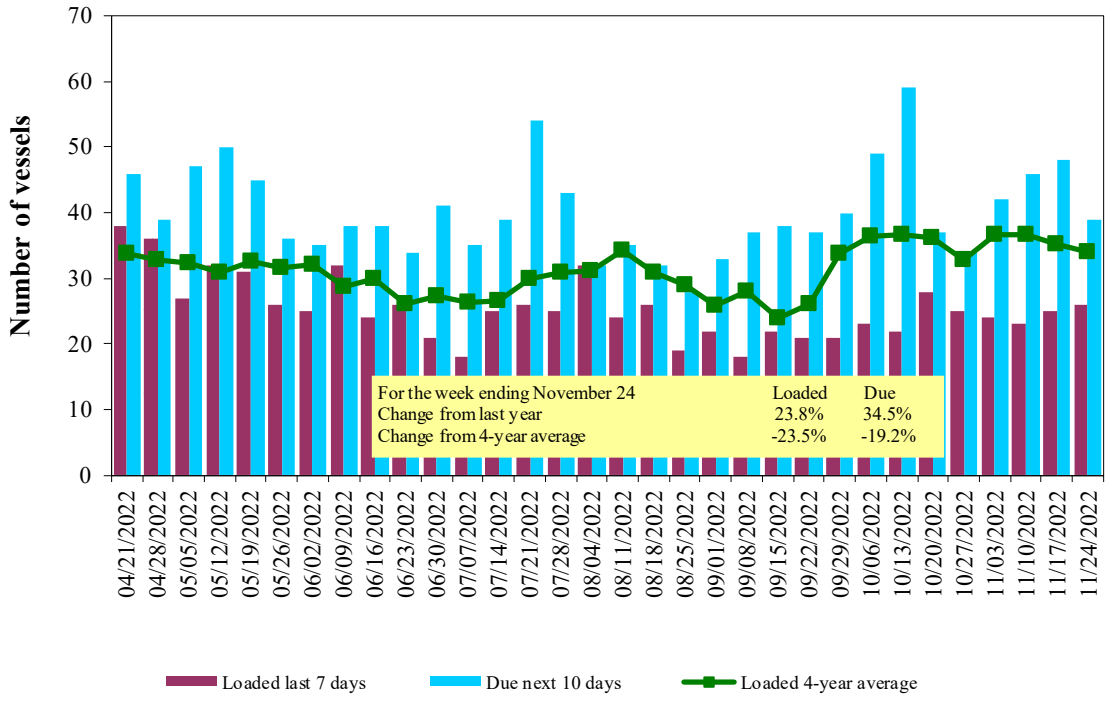
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/24/2022	41	26	39	19
11/17/2022	37	25	48	18
2021 range	(10…57)	(5...48)	(15...69)	(4…27)
2021 average	34	32	49	15

Note: The data is voluntarily collected and may not be complete.
Source: USDA, Agricultural Marketing Service.

Figure 15

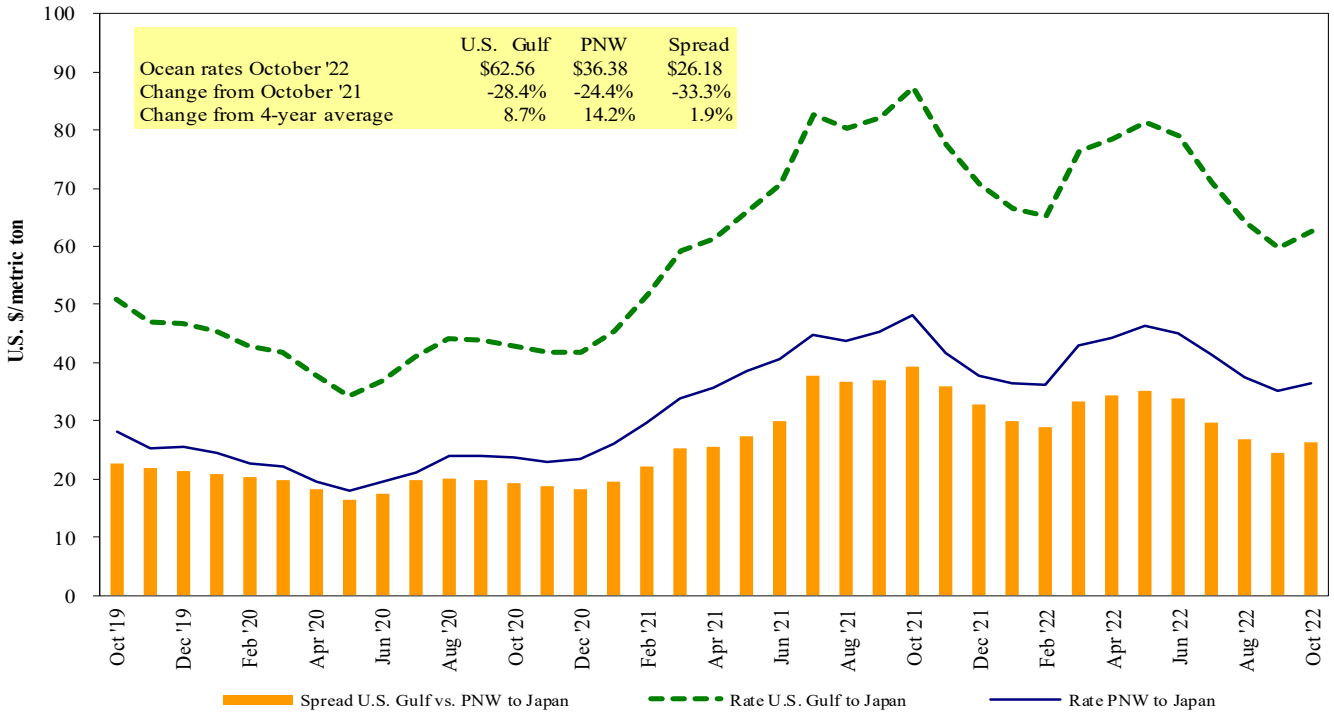
U.S. Gulf[1] vessel loading activity



[1]U.S. Gulf includes Mississippi, Texas, and East Gulf
Source: USDA, Agricultural Marketing Service.

Figure 16

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 17

Ocean freight rates for selected shipments, week ending 11/26/2022

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
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	Nov 5/15, 2022	22,500	102.88*
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

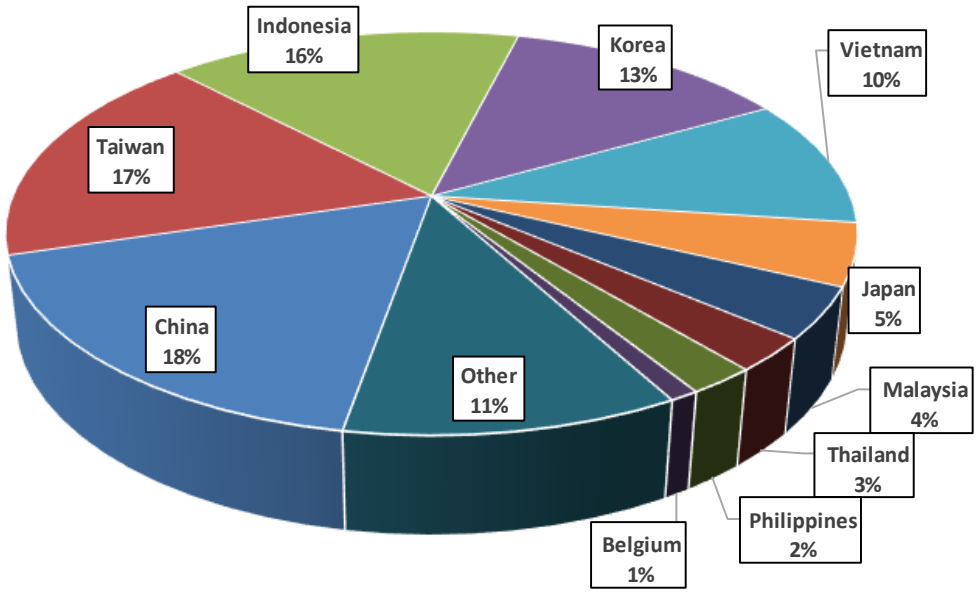
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

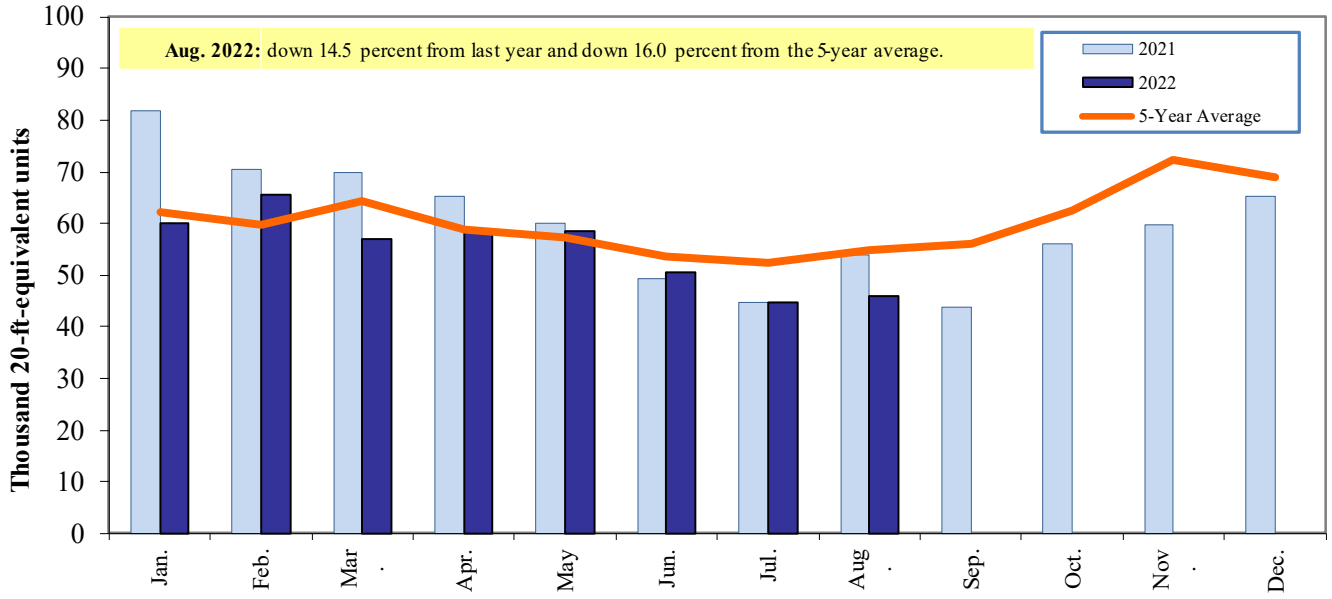
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Aug 2022



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', '230310', '230330', '2304', and '230990'.

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

Figure 18
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.

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