



Grain Transportation Report

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WEEKLY HIGHLIGHTS

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Labor Unrest Briefly Suspends LA/LB Port Operations

Last Thursday and Friday (April 6-7), terminal operations at the Ports of Long Beach and Los Angeles (LA/LB) were closed because of a shortage of dockworker labor. Normal operations resumed Friday evening (April 7), but shippers experienced additional delays on Monday (April 10), according to the *Journal of Commerce*. The incidents marked the latest port disruptions stemming from ongoing labor contract negotiations between the Pacific Maritime Association (PMA) and the International Longshore Warehouse Union (ILWU). (The previous contract expired last July.) PMA represents West Coast cargo carriers, terminal operators, and stevedores. ILWU represents West Coast dockworkers. PMA characterized the April 6-7 episode as a “concerted action to withhold labor at the ports” by ILWU. For its part, ILWU claimed the [worker absences](#) were due to a membership meeting on Thursday night and the Good Friday holiday the next day. Many agricultural exporters on the West Coast particularly depend on the Ports of LA/LB and lack other economically feasible options. Containerized soybean exports out of LA/LB represented around 4 percent of all soybean exports between 2018 and 2022.

USDA ERS Releases Report on Competitiveness of U.S. Crop Exports

USDA’s Economic Research Service (ERS) recently [released a new report](#): *U.S. Export Competitiveness in Select Crop Markets*. The report examined export competitiveness of the top five exported crop commodities: corn, soybean products, cotton, wheat products, and tree nuts. In the report, the authors emphasized trade agreements’ role in improving export competitiveness. For instance, from 2019 to 2021, the largest export markets for U.S. corn were Mexico (\$3.43 billion), Japan (\$2.36 billion), Colombia (\$889.8 million), South Korea (\$595.2 million), and Canada (\$575.3 million). All of these nations have trade agreement with the United States. According to the authors—by establishing no new trade agreements from 2012 through 2020, the United States could potentially cede future export opportunities to competitors that did establish trade agreements during that time. The full report can be downloaded [here](#).

New Oilseed Crushing Facility To Open in 2024

On March 14, Scoular [announced](#) it will convert a sunflower crushing plant in Goodland, KS, into a dual oilseed crush plant for biofuel production. The facility will crush both soybeans and canola, switching between them based on availability. Expected to begin operations in fall 2024, the plant will process 11 million bushels of oilseeds a year. If Scoular’s processing goal is realized, then the company’s biofuels production will, by itself, raise the demand for grain transportation.

FCS Builds New Grain Facility in South Dakota

[Construction of a new grain elevator](#) of the [Farmers Cooperative Society \(FCS\)](#) began in March. The facility will begin accepting soybeans this fall, and FCS expects to develop the site further and to accept corn within the next few years. The Union Grove elevator will be located 9 miles south of Beresford, SD, and 0.25 miles east of I-28, Exit 38. The facility will feature a 2.5-million-bushel flat storage building with a system that unloads grain at 30,000 bushels per hour. Union Grove’s grain service team will help customers arrange direct ship programs.

Snapshots by Sector

Export Sales

For the week ending March 30, **unshipped balances** of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 24.42 million metric tons (mmt), down 32 percent from the same time last year and down 1 percent from last week. Net **corn export sales** for MY 2022/23 were 1.247 mmt, up 20 percent from last week. Net **soybean export sales** were 0.155 mmt, down 55 percent from last week. Net weekly **wheat export sales** were 0.194 mmt, up significantly from last week.

Rail

U.S. Class I railroads originated 20,628 **grain carloads** during the week ending April 1. This was a 4-percent increase from the previous week, 7 percent fewer than last year, and 10 percent fewer than the 3-year average.

Average April **shuttle secondary railcar bids/offers** (per car) were \$211 below tariff for the week ending April 6. This was \$4 less than last week and \$2,436 lower than this week last year.

Barge

For the week ending April 8, **barge grain movements** totaled 683,733 tons. This was 4 percent lower than the previous week and 11 percent lower than the same period last year.

For the week ending April 8, 443 grain barges **moved down river**—11 fewer than last week. There were 593 grain barges **unloaded** in the New Orleans region, 16 percent fewer than last week.

Ocean

For the week ending April 6, 27 **oceangoing grain vessels** were loaded in the Gulf—25 percent fewer than the same period last year. Within the next 10 days (starting April 7), 42 vessels were expected to be loaded—22 percent fewer than the same period last year.

As of April 6, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$55.50. This was 7 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$30.00 per mt, up 3 percent from the previous week.

Fuel

For the week ending April 10, the U.S. average **diesel fuel price** decreased 0.7 cents from the previous week to \$4.098 per gallon, 97.5 cents below the same week last year.

Feature Article/Calendar

Grain Transportation Update: Ongoing Service Issues Amid Low Demand

Although some of the transportation challenges of 2022 have improved, rail and barge shippers have faced new and ongoing service issues so far in 2023. In part, these challenges stemmed from extreme winter weather in the U.S. Central and Western regions. Class I grain carloads in March were well below the same period for prior years, having declined significantly since January. Year-to-date (YTD) downbound grain movements through the Mississippi River were also below average. Recent barge spot rates, ocean freight rates, and diesel fuel prices have been below the same periods in 2022, too.

According to USDA's April [World Agricultural Supply and Demand Estimates \(WASDE\)](#), total marketing year (MY) 2022/23 U.S. exports and domestic use of the three major grains (corn, soybeans, and wheat) are expected to end below MY 2021/22. Low domestic and export demand likely accounts for low transportation volumes so far in 2023. *WASDE's* projections also suggest grain transportation demand will remain low through the rest of the marketing year.

Low Rail Grain Carloads and Mixed Service Metrics Amid Extreme Winter Weather

Grain carloads have generally declined since late January ([GTR fig. 2](#)). According to rail service [data from the Surface Transportation Board](#) (also [published on AgTransport](#)), the seven Class I railroads originated 88,000 grain carloads in March—down 17 percent from March 2022 and down 20 percent from the prior 5-year average for March. Some reductions may be due to record snow and rain totals in portions of the U.S. Central and Western regions this past winter. As of early April, [California's snowpack](#) is 237 percent of average for this date, and [snow totals in Minneapolis, MN](#), are the third highest on record.

Over the last few months, trends in the service metrics have been mixed. Bids for April shuttle car service in the secondary auction markets averaged \$207 below tariff for the week ending March 30. Bids for shuttle cars in May and June were likewise negative. Total rail traffic has been low recently, compared to last year. The light traffic may enable railroads to improve service somewhat, despite ongoing challenges from tight labor markets and extreme weather. One area of service improvement has been the number of unfilled orders for empty grain cars in manifest service. After reaching an all-time high of 18,851 in late January, the number of unfilled orders has dropped steeply: in the latest week of data, it was 5,327—down significantly from the prior peak, but still well-above zero. Besides low grain carloads, two metrics of continuing concern are grain origin dwell times and the number of cars not moved in over 48 hours. Between the start of February and the end of March, the average origin dwell times have risen from 19 hours to over 30 hours. The number of grain cars not moved in over 48 hours also rose from the start of February to the end of March, despite the overall reduction in carloadings over the same period.

Lower-Than-Average Downbound Grain Movements and Spot Rates

Since the beginning of the year, almost 7.9 million tons of downbound grain have transited the Mississippi River and its tributaries toward New Orleans. This is 7 percent less than last year and 3 percent less than the 5-year average. For most of January and February, lower-than-normal grain inspections and export sales softened demand for barges. YTD (through the week ending April 8), downbound corn movements were down 28 percent from the same period in 2022, while YTD downbound soybean movements were up 22 percent from 2022. In recent weeks, a rise in export sales to China spurred downbound grain movements, which peaked at 715,000 tons in the week ending April 1. The week ending April 1 was also the first time 2023 downbound grain movements surpassed both the same week in 2022 and the 5-year average.

In January and February, barge delays and a tight barge supply resulted from Winter Storm Elliot, the normal closure of the Upper- and Mid-Mississippi River, and lock closures (Melvin Price Lock and Dam and Locks 27). In March, high water levels along portions of the Mississippi River System led to tow and draft size restrictions on barges. The Upper- and Mid-Mississippi River also reopened in March. The barges in the reopened sections were slow to work their way back into the system, further tightening supply. In March, a sizable decline in spot freight rates prompted some barge lines to wait for rates to improve before running their empties out of the Gulf. The decision to wait created a gap in the supply of empty barges.

Despite the tightening barge supplies since January, weekly spot freight rates have significantly lagged the same weeks last year by an average of 28 percent, but exceeded the 5-year average by an average of 16 percent. From January 3 to March 13, the spot freight rate at St. Louis fell from 725 percent of tariff (\$28.93 per ton) to 353 percent of tariff (\$14.08 per ton), a drop of 51 percent. For the week of April 11, the St. Louis spot rate of 381 percent of tariff (\$15.20 per ton) was down 42 percent from the same week last year and down 86 percent from last year's peak spot rate in October.

Dry-Bulk Ocean Freight Rates Rose, But Still Moderate

After stabilizing during the prior 2 weeks, ocean freight rates for shipping bulk commodities, including grain, rose. The rise was partly a result of Chinese port congestion and slower vessel turn times, especially for larger ships (*Transportation and Export Report*, O'Neil Commodity Consulting, April 6, 2023). As of April 6, the ocean freight rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$55.50—7 percent more than the previous week, 3 percent more than this year's first available rate (January 5), 18 percent less than the same 2022 period, and 1 percent more than the 4-year average. The rate from the Pacific Northwest to Japan was \$30.00 per mt—3 percent more than the previous week, 2 percent less than the start of the year, 31 percent less than the same 2022 period, and 2 percent less than the 4-year average. Also, as of April 6, the rate from the U.S. Gulf to Europe was \$28.00 per mt—4 percent more than the previous week, 2 percent less than the beginning of the year, 2 percent less than the same 2022 period, and 43

percent more than the 4-year average. Despite the recent week-to-week rise, ocean freight rates are generally much lower than a year ago. However, rising demand for iron ore by China and reinstated coal trade with Australia may boost the demand for vessels, and consequently put upward pressure on ocean freight rates in the coming months (*Shipping Insight*, Drewry, April 7, 2023). YTD, as of April 6, an average of 28 oceangoing grain vessels per week were loaded in the U.S. Gulf, versus an average 34 vessels per week for the same 2022 period.

Diesel Prices Decline for 10 Straight Weeks, Projected To Decrease Further in Summer

From the week ending February 2 to April 10, diesel prices fell for 10 straight weeks. For the week ending April 10, the U.S. average diesel fuel price decreased 0.7 cents from the previous week to \$4.098 per gallon—97.5 cents below the same week last year. The current price is below the \$4.104 price of February 28, 2022—the first week after Russia’s invasion of Ukraine. The low diesel price is at odds with [a recent 6-percent increase](#) in oil prices (which would typically lift the diesel price). Oil prices rose following an April 3 announcement that OPEC+ (i.e., partner countries, including Russia) would cut crude oil production by 1.2 million barrels per day (b/d) through the end of 2023. According to the most recent [Energy Information Administration \(EIA\) April forecast](#), the OPEC production cuts are expected to reduce refinery margins and the volume of crude oil consumed by refineries. EIA forecasts the U.S. average diesel price to be \$4.07 per gallon in second quarter 2023 and \$3.89 per gallon in third quarter 2023—down from an average of \$5.49 per gallon and \$5.16 per gallon, respectively, for the same periods last year.

Grain Exports Decline in MY 2022/23

According to USDA’s April *WASDE*, total U.S. disappearance (domestic use plus exports) of the three major grains are expected to total 20.0 billion bushels in marketing year (MY) 2022/23, down 6 percent from MY 2021/22—resulting in lower demand for transportation. Exports for these grains are down 15 percent year to year, because of lower exportable supplies, high transportation costs, and uncompetitive prices (table 1).

At the beginning of the marketing year, logistical problems and uncompetitive prices of U.S. corn hampered exports. Although prices improved in mid-January, export sales were slow to respond. China—which accounts for over 20 percent of U.S. corn exports—changed this situation somewhat in March: from the week ending March 2 to the week ending March 30, total U.S. exports to China rose 3.6 mmt. Using the *WASDE* projection for the marketing year, and given the corn already shipped in MY 2022/23, the projection leaves 26.7 mmt of corn to be shipped through August 31. This total is 8 percent below the same time last year. As of March 30, 16.8 mmt of committed sales were waiting to be shipped, compared to 20.6 mmt at the same time last year.

U.S. soybean exports [benefited from Brazil’s slow harvest](#) in February, raising the *WASDE* March exports projection by over 681,000 mt. China accounts for 62 percent of total U.S. soybean exports to date in MY 2022/23. Using the *WASDE* projection for the marketing year, and given the soybeans already shipped in MY 2022/23, the projection leaves 9.9 mmt of soybeans to be shipped through August 31. This total is 32 percent below the same time last year. As of March 30, 4.8 mmt of committed soybean sales were waiting to be shipped, compared to 11.8 mmt at the same time last year.

U.S. wheat exports to China remain limited (just 6 percent of total U.S. exports), despite China’s rise to the position of world’s largest wheat importer in MY 2022/23. As of March 30, unshipped exports are 18 percent below the same time in MY 2021/22 and 37 percent below the 3-year average. Although U.S. wheat prices have [recently fallen](#), so, too, have the prices of key competitors. Thus, U.S. freight-on-board (FOB) prices remain above the prices of other suppliers, such as France and Russia, though the price spread has narrowed slightly.

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Table 1. Major grains: production and use, April 2023					
million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2022/23 (<i>Projected</i>)					
Production	13,730	4,276	1,650	19,656	-7.2%
Exports	1,850	2,015	775	4,640	-14.5%
Domestic use	11,955	2,341	1,100	15,396	-3.0%
Ending stocks	1,342	210	598		
Total use	13,805	4,355	1,875		
Stocks/use	9.7%	4.8%	31.9%		
United States 2021/22 (<i>Estimated</i>)					
Production	15,074	4,465	1,646	21,185	5.1%
Exports	2,471	2,158	800	5,429	-9.6%
Domestic use	12,484	2,307	1,088	15,879	2.9%
Ending stocks	1377	274	698		
Total use	14,956	4,464	1,888		
Stocks/use	9.2%	6.1%	37.0%		
United States 2020/21					
Production	14,111	4,216	1,828	20,155	
Exports	2,747	2,266	994	6,007	
Domestic use	12,074	2,238	1,117	15,429	
Ending stocks	1,235	257	845		
Total use	14,821	4,504	2,111		
Stocks/use	8.3%	5.7%	40.0%		

Source: USDA, World Agricultural Supply and Demand Estimates, April 2023.

Grain Transportation Indicators

Table 1
Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Non-Shuttle	Shuttle		Gulf	Pacific
04/12/23	275	324	246	295	248	213
04/05/23	276	324	246	312	233	206

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

Source: USDA, Agricultural Marketing Service.

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

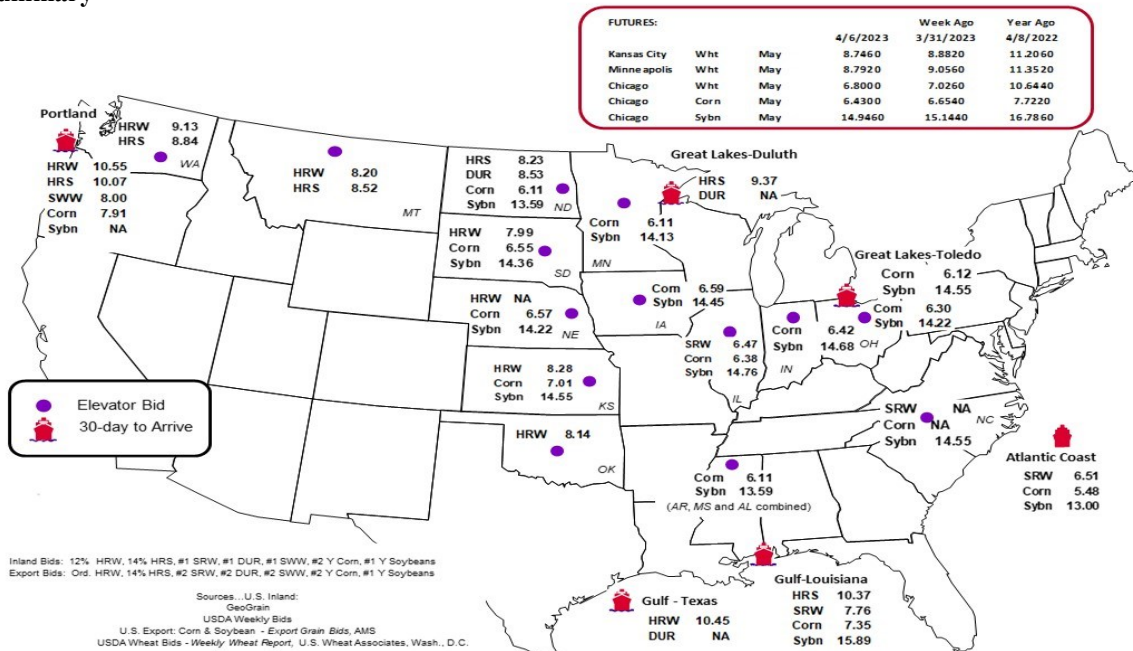
Commodity	Origin-destination	4/7/2023	3/31/2023
Corn	IL-Gulf	-0.97	-0.99
Corn	NE-Gulf	-0.78	-0.75
Soybean	IA-Gulf	-1.44	-1.49
HRW	KS-Gulf	-2.17	-2.27
HRS	ND-Portland	-1.84	-1.96

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: 4/1/2023	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,181	2,301	9,013	1,513	5,620	20,628	4,658	5,369
This week last year	2,092	2,416	10,955	1,185	5,637	22,285	3,484	3,729
2023 YTD	26,945	34,999	129,455	17,297	74,024	282,720	67,395	59,628
2022 YTD	24,234	30,072	152,773	16,794	79,872	303,745	45,457	48,358
2023 YTD as % of 2022 YTD	111	116	85	103	93	93	148	123
Last 4 weeks as % of 2022*	108	104	75	114	99	89	147	123
Last 4 weeks as % of 3-yr. avg.**	110	101	73	119	96	87	115	99
Total 2022	93,313	130,401	570,232	66,338	296,945	1,157,229	214,290	214,010

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

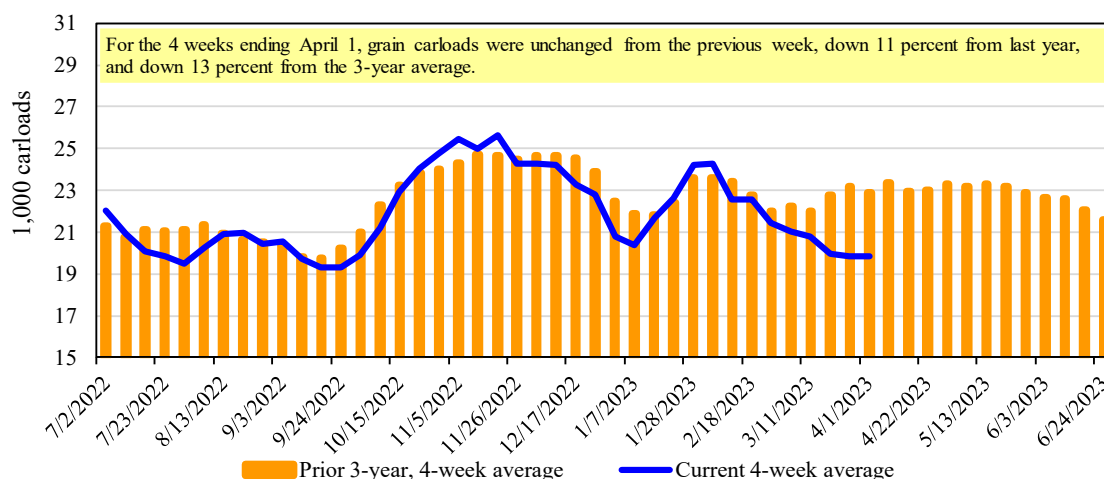
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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 offerings¹ (\$/car)²

For the week ending: 4/6/2023		Delivery period							
4/6/2023		Apr-23	Apr-22	May-23	May-22	Jun-23	Jun-22	Jul-23	Jul-22
BNSF ³	COT grain units	0	n/a	0	no bids	no bids	no bids	no bids	no bids
	COT grain single-car	no offer	n/a	no offer	197	no offer	18	0	0
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a

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

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

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

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

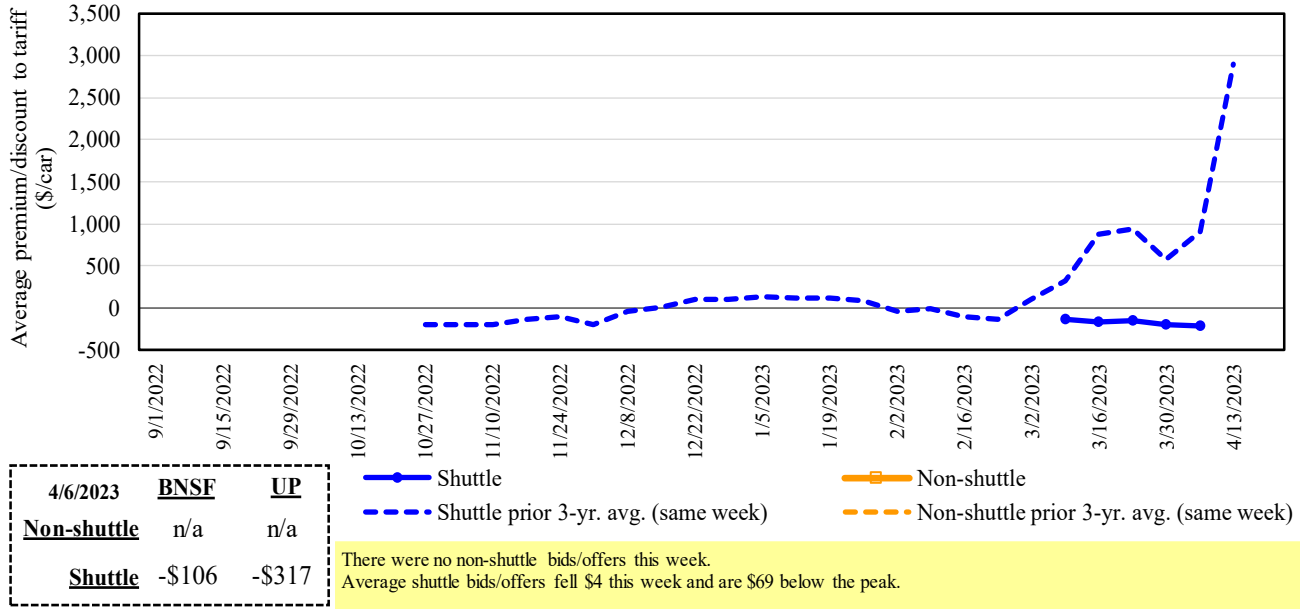
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

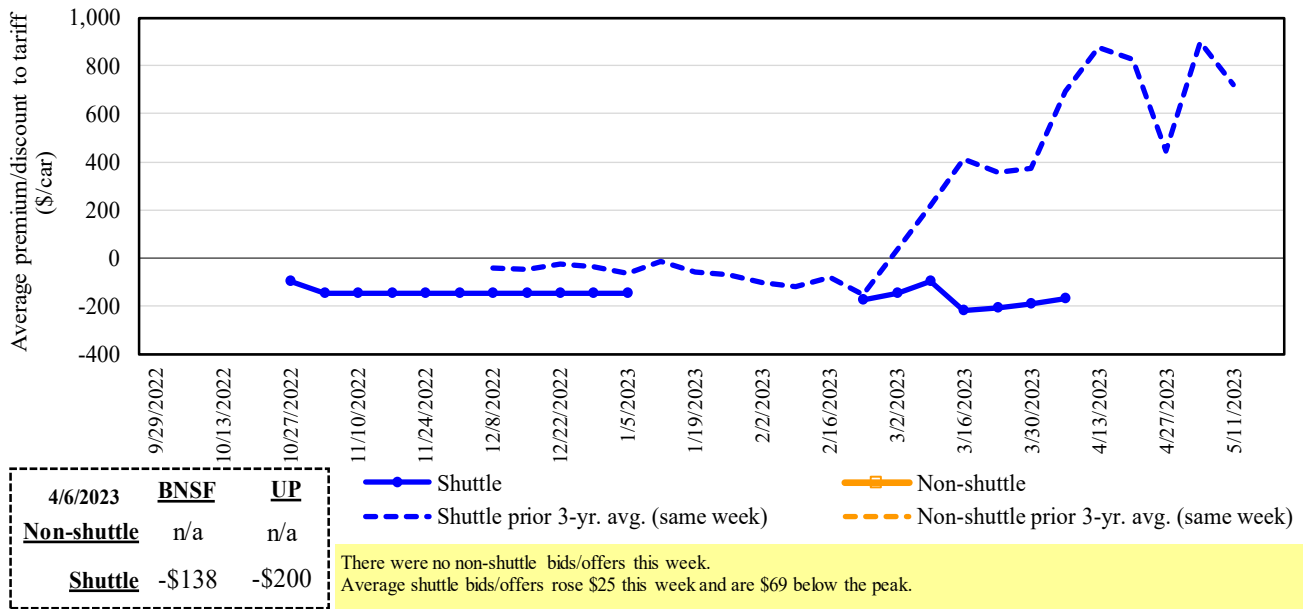
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 3
Secondary market bids/offers for railcars to be delivered in April 2023



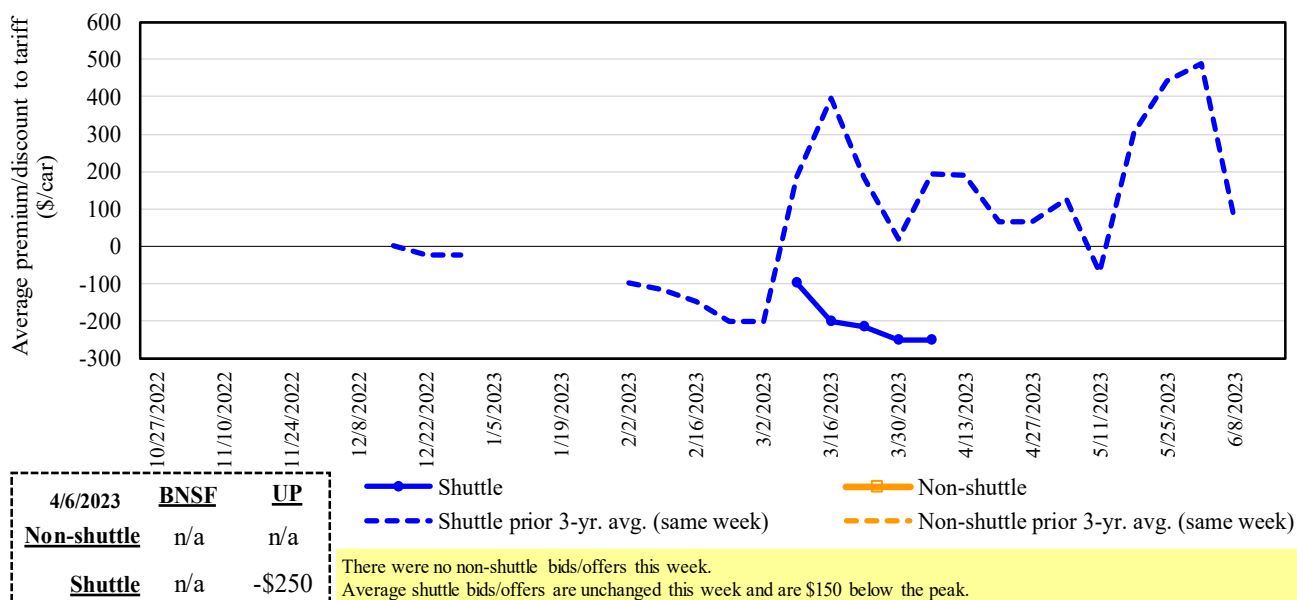
Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad
 Source: USDA, Agricultural Marketing Service.

Figure 4
Secondary market bids/offers for railcars to be delivered in May 2023



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 June 2023



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:		Delivery period					
		Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23
4/6/2023							
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 2022	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 2022	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(106)	(138)	n/a	n/a	(200)	33
	Change from last week	25	51	n/a	n/a	0	(184)
	Change from same week 2022	(2,056)	(1,600)	n/a	n/a	(225)	(311)
	UP-Pool	(317)	(200)	(250)	(250)	(100)	n/a
	Change from last week	(34)	0	0	(25)	0	n/a
	Change from same week 2022	(2,817)	(2,638)	n/a	n/a	(250)	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.

Table 6

Tariff rail rates for unit and shuttle train shipments¹

April 2023	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,695	\$238	\$39.05	\$1.06	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,858	\$89	\$39.20	\$1.07	6
	Wichita, KS	Los Angeles, CA	\$7,490	\$459	\$78.94	\$2.15	5
	Wichita, KS	New Orleans, LA	\$4,600	\$418	\$49.83	\$1.36	5
	Sioux Falls, SD	Galveston-Houston, TX	\$7,226	\$377	\$75.50	\$2.05	4
	Colby, KS	Galveston-Houston, TX	\$4,850	\$458	\$52.71	\$1.43	4
	Amarillo, TX	Los Angeles, CA	\$5,121	\$638	\$57.19	\$1.56	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$473	\$44.42	\$1.13	2
	Toledo, OH	Raleigh, NC	\$8,551	\$525	\$90.13	\$2.29	6
	Des Moines, IA	Davenport, IA	\$2,655	\$100	\$27.36	\$0.69	6
	Indianapolis, IN	Atlanta, GA	\$6,593	\$394	\$69.38	\$1.76	7
	Indianapolis, IN	Knoxville, TN	\$5,564	\$255	\$57.79	\$1.47	7
	Des Moines, IA	Little Rock, AR	\$4,250	\$294	\$45.13	\$1.15	7
	Des Moines, IA	Los Angeles, CA	\$6,130	\$857	\$69.38	\$1.76	6
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,856	\$715	\$45.39	\$1.24	8
	Toledo, OH	Huntsville, AL	\$7,037	\$374	\$73.59	\$2.00	5
	Indianapolis, IN	Raleigh, NC	\$7,843	\$532	\$83.17	\$2.26	6
	Indianapolis, IN	Huntsville, AL	\$5,689	\$253	\$59.00	\$1.61	7
	Champaign-Urbana, IL	New Orleans, LA	\$4,865	\$473	\$53.01	\$1.44	6
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,393	\$264	\$46.25	\$1.26	7
	Wichita, KS	Galveston-Houston, TX	\$4,311	\$206	\$44.85	\$1.22	-1
	Chicago, IL	Albany, NY	\$7,090	\$495	\$75.33	\$2.05	7
	Grand Forks, ND	Portland, OR	\$6,051	\$456	\$64.62	\$1.76	6
	Grand Forks, ND	Galveston-Houston, TX	\$5,399	\$475	\$58.33	\$1.59	6
	Colby, KS	Portland, OR	\$5,923	\$752	\$66.28	\$1.80	2
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$555	\$61.72	\$1.57	8
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$509	\$60.86	\$1.55	8
	Champaign-Urbana, IL	New Orleans, LA	\$4,170	\$473	\$46.11	\$1.17	8
	Lincoln, NE	Galveston-Houston, TX	\$4,360	\$296	\$46.24	\$1.17	9
	Des Moines, IA	Amarillo, TX	\$4,670	\$370	\$50.05	\$1.27	7
	Minneapolis, MN	Tacoma, WA	\$5,660	\$551	\$61.68	\$1.57	8
	Council Bluffs, IA	Stockton, CA	\$5,580	\$570	\$61.07	\$1.55	8
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,350	\$509	\$68.11	\$1.85	7
	Minneapolis, MN	Portland, OR	\$6,400	\$555	\$69.07	\$1.88	7
	Fargo, ND	Tacoma, WA	\$6,250	\$452	\$66.56	\$1.81	7
	Council Bluffs, IA	New Orleans, LA	\$5,095	\$545	\$56.01	\$1.52	5
	Toledo, OH	Huntsville, AL	\$5,277	\$374	\$56.12	\$1.53	7
Grand Island, NE	Portland, OR	\$5,730	\$769	\$64.54	\$1.76	10	

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

75-120 cars that meet railroad efficiency requirements.

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

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

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

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

Table 7

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

Date: December 2022			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,699	\$0	\$78.67	\$2.14	0
	OK	Cuautitlan, EM	\$6,900	\$537	\$75.99	\$2.07	4
	KS	Guadalajara, JA	\$7,619	\$2,672	\$105.14	\$2.86	1
	TX	Salinas Victoria, NL	\$4,420	\$298	\$48.21	\$1.31	3
Corn	IA	Guadalajara, JA	\$9,102	\$2,299	\$116.49	\$2.96	2
	SD	Celaya, GJ	\$8,300	\$0	\$84.81	\$2.15	0
	NE	Queretaro, QA	\$8,322	\$919	\$94.42	\$2.40	5
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,687	\$891	\$87.65	\$2.22	6
	SD	Torreon, CU	\$7,825	\$0	\$79.95	\$2.03	0
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$2,142	\$110.24	\$3.00	2
	NE	Guadalajara, JA	\$9,207	\$2,209	\$116.64	\$3.17	2
	IA	El Castillo, JA	\$9,510	\$0	\$97.17	\$2.64	0
	KS	Torreon, CU	\$8,109	\$1,527	\$98.46	\$2.68	2
Sorghum	NE	Celaya, GJ	\$7,932	\$2,019	\$101.68	\$2.58	3
	KS	Queretaro, QA	\$8,108	\$670	\$89.68	\$2.28	4
	NE	Salinas Victoria, NL	\$6,713	\$538	\$74.08	\$1.88	4
	NE	Torreon, CU	\$7,225	\$1,393	\$88.05	\$2.23	3

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

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

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

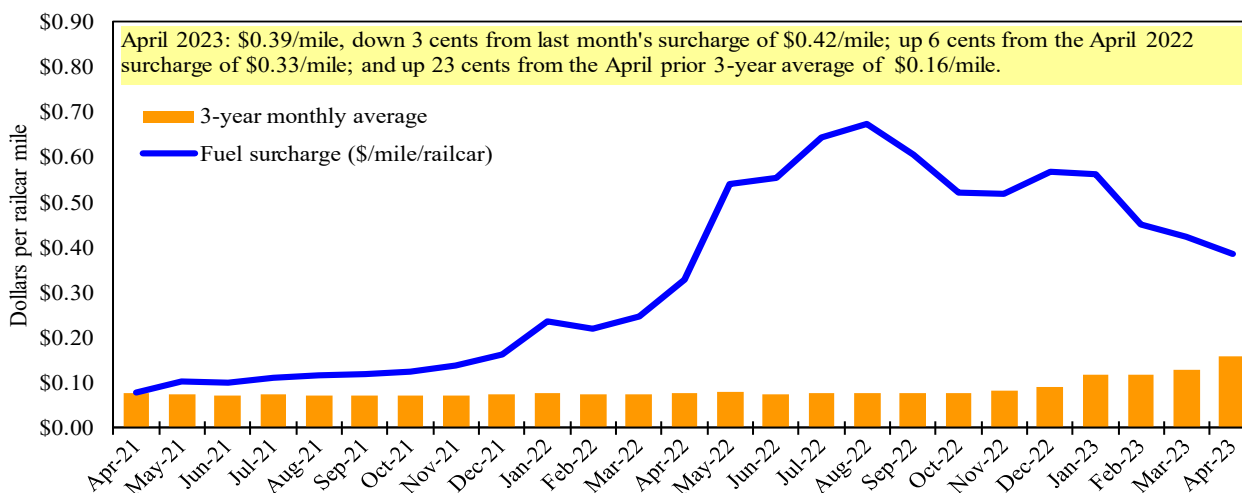
⁴Percentage change calculated using tariff rate plus fuel surcharge; Y/Y = year over year.

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

As we incorporate the change, Table 8 updates will be delayed.

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

Figure 6

Railroad fuel surcharges, North American weighted average¹

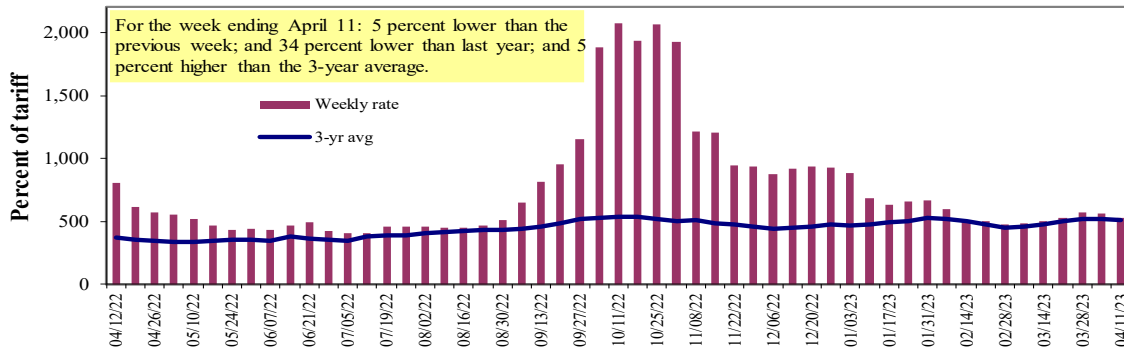
¹ Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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}



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

Table 8

Weekly barge freight rates: Southbound only

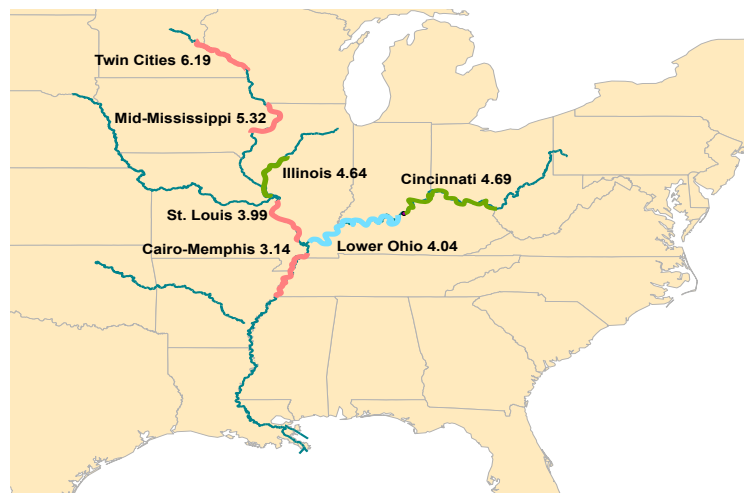
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	4/11/2023	580	550	531	381	419	419	323
	4/4/2023	585	566	561	404	436	436	332
\$/ton	4/11/2023	35.90	29.26	24.64	15.20	19.65	16.93	10.14
	4/4/2023	36.21	30.11	26.03	16.12	20.45	17.61	10.42
Current week % change from the same week:								
	Last year	-27	-29	-34	-42	-47	-47	-43
	3-year avg. ²	1	6	5	-3	-5	-5	-7
Rate ¹	May	549	508	495	368	397	397	294
	July	515	486	469	357	384	384	295

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

Figure 8 Benchmark tariff rates

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

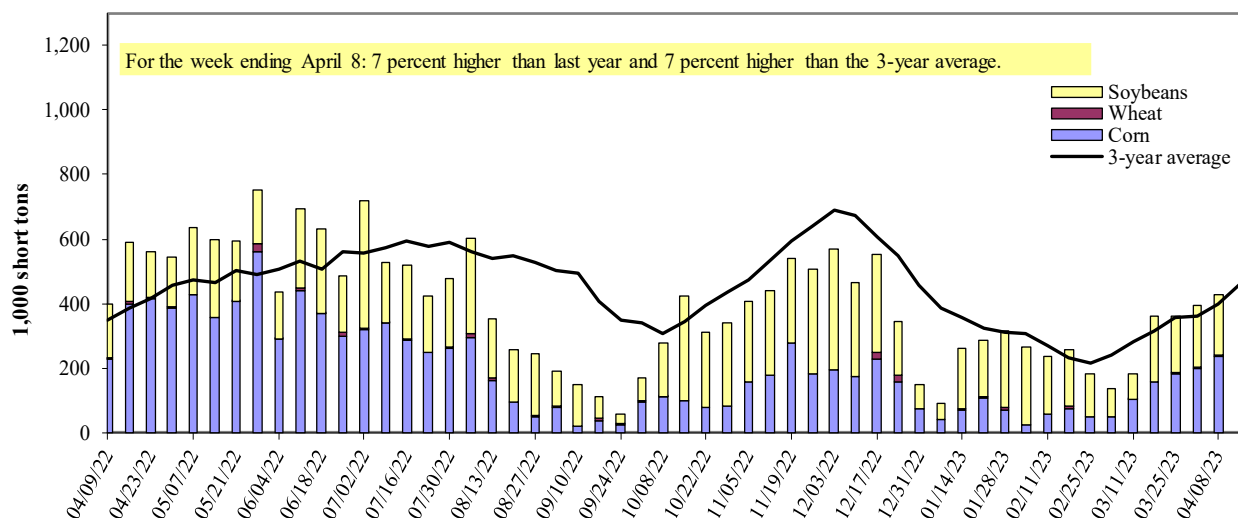
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



Map Credit: USDA, Agricultural Marketing Service

Figure 9

Barge movements on the Mississippi River¹ (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

Barged grain movements (1,000 tons)

For the week ending 04/08/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	35	0	107	0	142
Winfield, MO (L25)	122	0	167	0	289
Alton, IL (L26)	238	2	182	0	422
Granite City, IL (L27)	237	2	190	0	428
Illinois River (La Grange)	81	2	17	0	100
Ohio River (Olmsted)	146	17	50	5	219
Arkansas River (L1)	0	33	4	0	37
Weekly total - 2023	383	51	245	5	684
Weekly total - 2022	444	46	273	3	766
2023 YTD ¹	3,405	364	4,008	124	7,900
2022 YTD ¹	4,720	415	3,291	82	8,509
2023 as % of 2022 YTD	72	88	122	150	93
Last 4 weeks as % of 2022 ²	83	80	104	86	90
Total 2022	16,437	1,594	14,464	232	32,727

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.

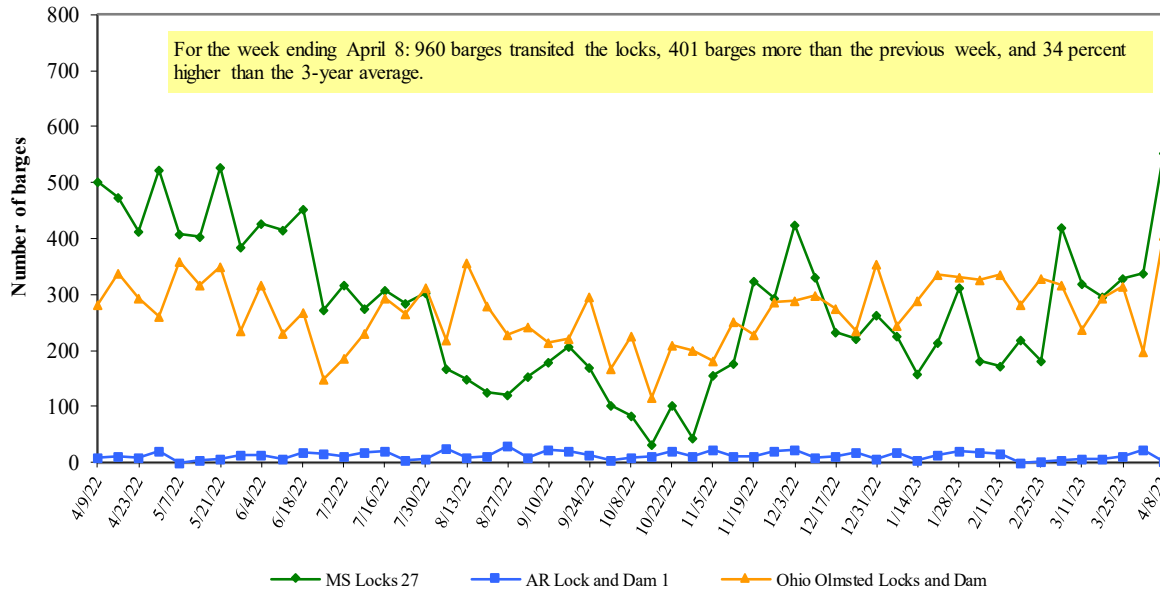
² As a percent of same period in 2022.

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

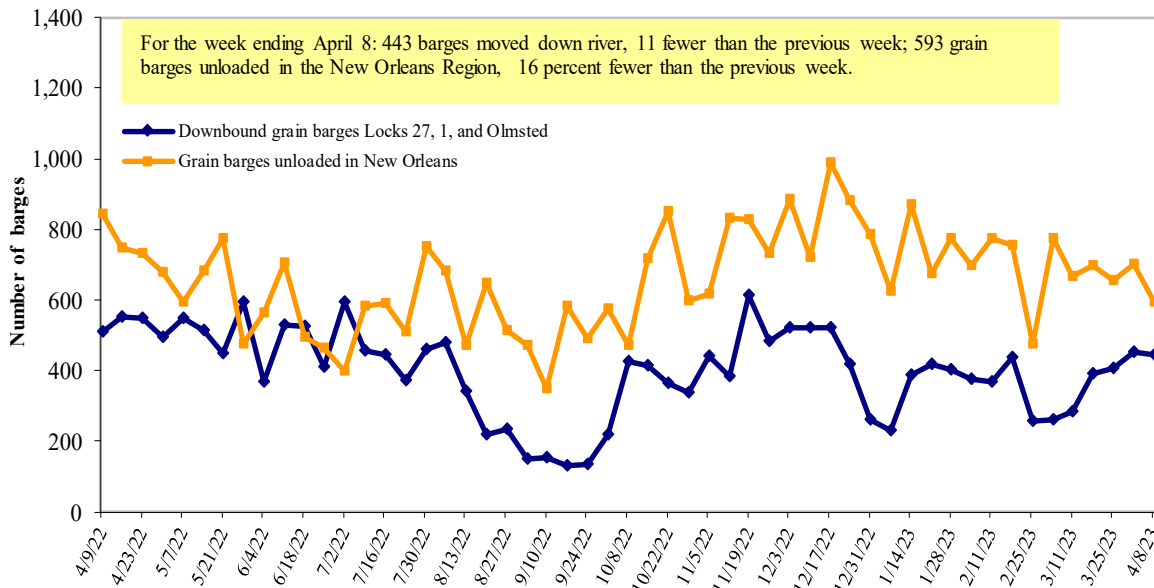


Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

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 4/10/2023 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.199	-0.027	-0.929
	New England	4.568	-0.012	-0.613
	Central Atlantic	4.483	-0.044	-0.808
	Lower Atlantic	4.055	-0.023	-0.963
II	Midwest	3.968	0.016	-0.919
III	Gulf Coast	3.883	-0.004	-0.957
IV	Rocky Mountain	4.095	-0.055	-0.947
	West Coast	4.699	-0.025	-1.062
V	West Coast less California	4.446	0.004	-0.817
	California	4.989	-0.058	-1.234
Total	United States	4.098	-0.007	-0.975

¹Diesel 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.

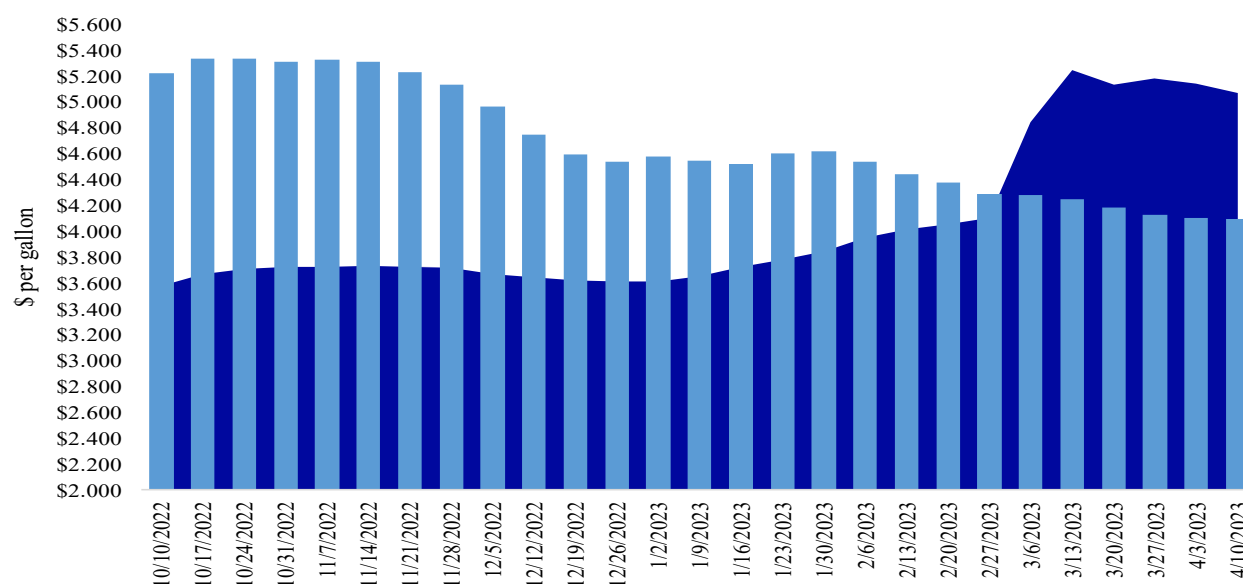
Source: U.S. Department of Energy, Energy Information Administration.

Figure 12

Weekly diesel fuel prices, U.S. average

For the week ending April 10, the U.S. average diesel fuel price decreased 0.7 cents from the previous week to \$4.098 per gallon, 97.5 cents below the same week last year.

■ Last year ■ Current year
\$5.073 \$4.098



Note: On June 13, 2022 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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances¹									
3/30/2023	615	488	889	664	77	2,733	16,832	4,850	24,415
This week year ago	1,451	459	935	476	16	3,336	20,623	11,765	35,725
Cumulative exports-marketing year²									
2022/23 YTD	4,308	2,337	4,597	3,875	291	15,408	20,380	45,066	80,854
2021/22 YTD	6,096	2,314	4,357	2,864	174	15,806	33,813	44,322	93,941
YTD 2022/23 as % of 2021/22	71	101	105	135	167	97	60	102	86
Last 4 wks. as % of same period 2021/22	45	108	99	159	446	87	78	48	69
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 w
HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 12

Top 5 importers¹ of U.S. corn

For the week ending 3/30/2023	Total commitments ²		% change current MY from last MY	Exports 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
	1,000 mt -			-1,000 mt -
Mexico	13,552	14,996	(10)	15,227
China	8,101	12,106	(33)	12,616
Japan	4,892	8,565	(43)	10,273
Columbia	1,665	3,771	(56)	4,398
Korea	844	726	16	2,563
Top 5 importers	29,054	40,163	(28)	45,077
Total U.S. corn export sales	37,212	54,437	(32)	56,665
% of YTD current month's export projection ⁴	79%	87%		
Change from prior week ²	1,247	783		
Top 5 importers' share of U.S. corn export sales	78%	74%		80%
USDA forecast April 2023	47,074	62,875	(25)	
Corn use for ethanol USDA forecast, April 2023	133,350	135,281	(1)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative 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.

³FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average; YTD = year to date.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers¹ of U.S. soybeans

For the week ending 3/30/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
	1,000 mt -			-1,000 mt -
China	30,992	28,748	8	27,283
Mexico	4,190	4,911	(15)	4,929
Egypt	1,099	3,582	(69)	3,553
Japan	1,828	1,909	(4)	2,266
Indonesia	1,226	1,280	(4)	2,116
Top 5 importers	39,334	40,430	(3)	40,147
Total U.S. soybean export sales	49,916	56,087	(11)	54,231
% of projected exports	91%	95%		
change from prior week ²	155	801		
Top 5 importers' share of U.S. soybean export sales	79%	72%		74%
USDA forecast, April 2023	54,905	58,801	(7)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative 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.

³FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average; YTD = year to date.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

Top 10 importers¹ of all U.S. wheat

For the week ending 3/30/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
	1,000 mt -			-1,000 mt -
Mexico	3,157	3,488	(9)	3,566
Philippines	2,208	2,716	(19)	2,985
Japan	2,100	2,355	(11)	2,453
China	1,098	848	30	1,537
Nigeria	753	1,973	(62)	1,528
Korea	1,259	1,245	1	1,459
Taiwan	810	915	(11)	1,106
Indonesia	345	122	183	711
Thailand	625	557	12	703
Colombia	519	700	(26)	621
Top 10 importers	12,875	14,919	(14)	16,669
Total U.S. wheat export sales	18,141	19,142	(5)	22,763
% of projected exports	86%	88%		
change from prior week ²	194	156		
wheat export sales	71%	78%		73%
USDA forecast, April 2023	21,117	21,798	(3)	

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

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

³FAS marketing year ranking 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 04/06/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of:		2022 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	229	68	335	3,351	2,907	115	115	76	9,836
Corn	70	193	36	1,010	3,461	29	40	33	9,615
Soybeans	70	0	n/a	3,369	3,895	86	14	28	14,178
Total	369	261	142	7,729	10,264	75	56	49	33,629
Mississippi Gulf									
Wheat	34	55	61	747	1,086	69	65	96	4,053
Corn	559	689	81	6,556	12,294	53	63	66	30,781
Soybeans	516	437	118	10,883	7,728	141	147	185	31,283
Total	1,109	1,182	94	18,185	21,108	86	84	95	66,116
Texas Gulf									
Wheat	30	38	79	586	801	73	66	46	3,421
Corn	0	0	n/a	68	180	38	26	28	648
Soybeans	0	0	n/a	52	2	n/a	n/a	0	685
Total	30	38	79	707	983	72	57	42	4,754
Interior									
Wheat	48	15	328	708	846	84	71	71	2,912
Corn	162	197	82	2,587	2,494	104	102	97	8,961
Soybeans	79	74	106	2,152	2,097	103	77	84	7,109
Total	289	286	101	5,447	5,438	100	88	89	18,982
Great Lakes									
Wheat	12	1	n/a	75	26	292	636	n/a	395
Corn	0	0	n/a	0	7	0	0	0	158
Soybeans	28	0	n/a	31	19	162	150	451	760
Total	41	1	n/a	106	52	205	180	532	1,312
Atlantic									
Wheat	0	0	n/a	36	4	812	n/a	3	169
Corn	0	0	n/a	44	59	74	20	45	309
Soybeans	10	18	57	1,078	916	118	73	111	2,867
Total	10	19	55	1,159	980	118	68	100	3,345
U.S. total from ports*									
Wheat	353	177	199	5,503	5,670	97	91	74	20,786
Corn	791	1,079	73	10,265	18,496	55	62	62	50,471
Soybeans	704	530	133	17,564	14,657	120	103	136	56,882
Total	1,849	1,787	103	33,332	38,824	86	78	80	128,139

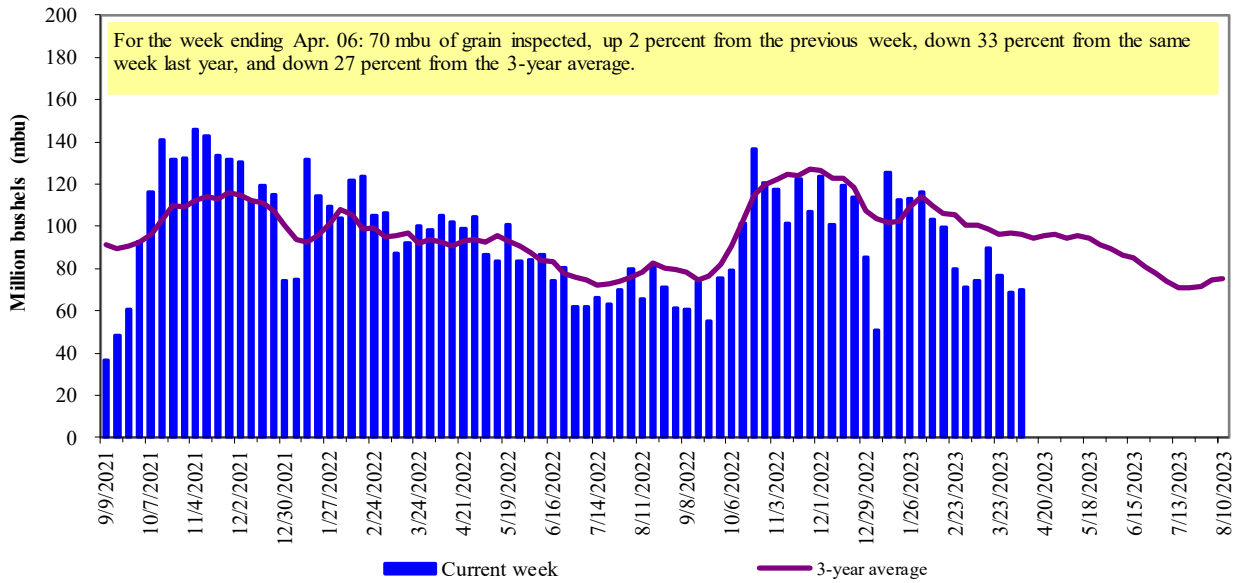
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

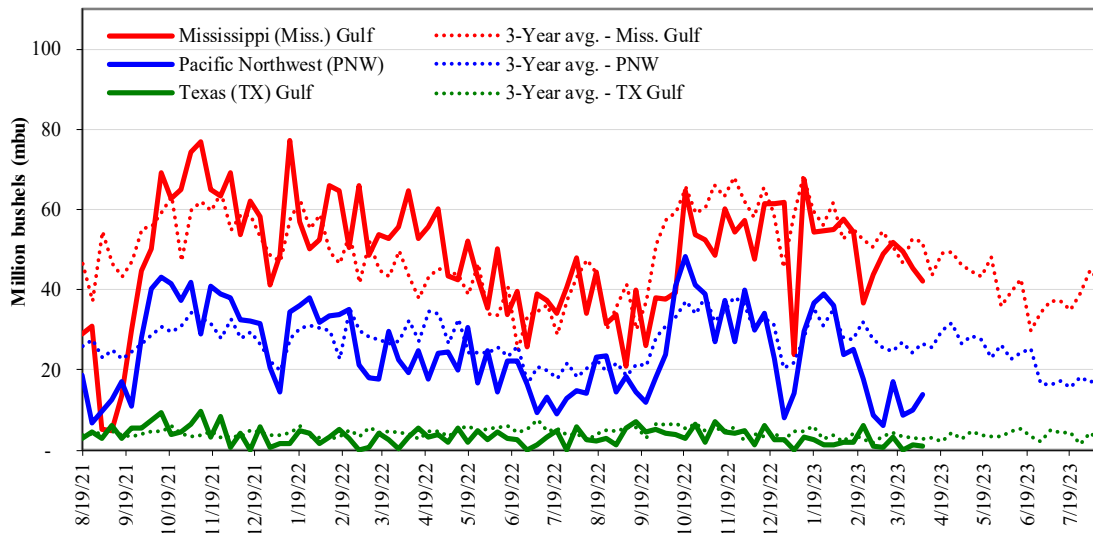


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 04/06/23 inspections (mbu):		Percent change		MS Gulf	TX	U.S. Gulf	PNW
MS Gulf:	42.2	Last wk:		down 7	down 21	down 7	up 36
PNW:	13.8	Last Year (same wk):		down 35	down 65	down 36	down 29
TX Gulf:	1.1	3-yr avg. (4-wk. mov. Avg):		down 17	down 68	down 20	down 46

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

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

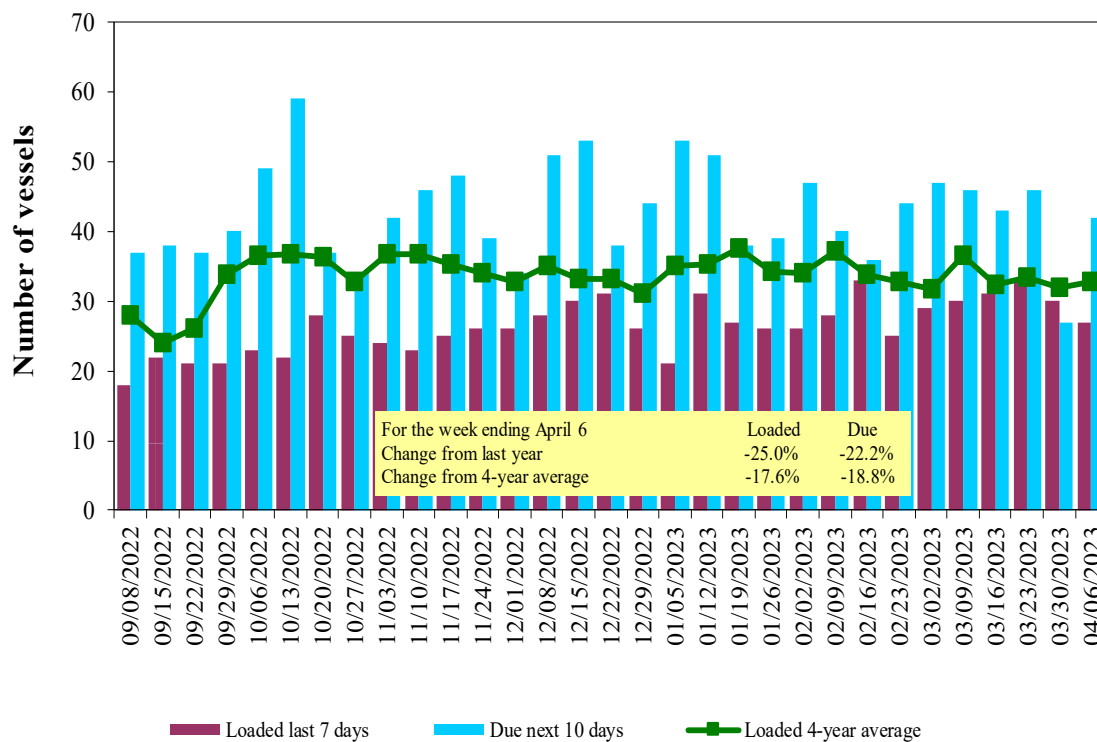
Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
4/6/2023	14	27	42	6
3/30/2023	24	30	27	4
2022 range	(14...61)	(18...39)	(28...62)	(5...23)
2022 average	30	28	44	13

Note: The data is voluntarily collected and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 15

U.S. Gulf¹ vessel loading activity

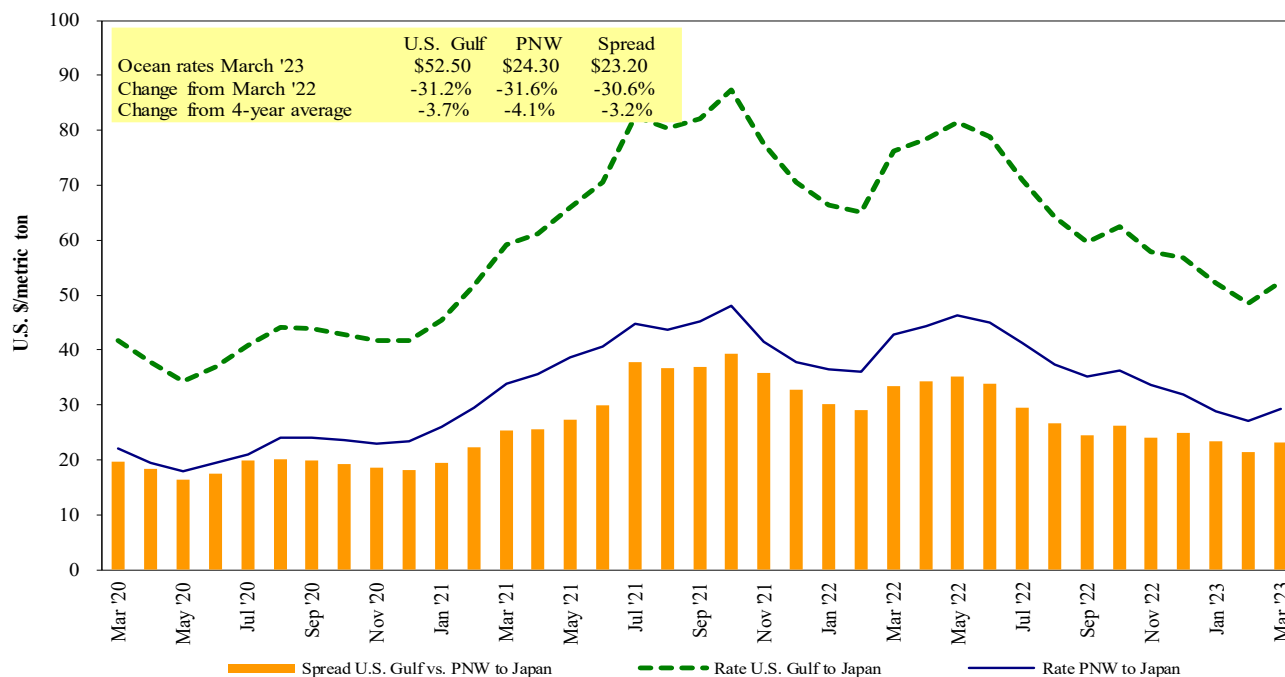


¹U.S. Gulf¹ includes Mississippi, Texas, and East Gulf

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 04/08/2023

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	May 2, 2023	50,000	56.70
U.S. Gulf	Japan	Heavy grain	May 1, 2023	50,000	54.80
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
U.S. Gulf	S. China	Corn	Aug 1/10, 2022	68,000	71.00
U.S. Gulf	Kenya	Sorghum	Feb 15/25, 2023	22,820	63.30*
U.S. Gulf	Djibouti	Wheat	Nov 5/15, 2022	22,500	102.88*
PNW	N. China	Heavy grain	Apr 21/27, 2023	63,000	28.00
PNW	N. China	Heavy grain	May 1/4, 2023	66,000	29.00
WC US	Japan	Wheat	Feb 1/Mar 1, 2023	34,500	47.75
Brazil	N. China	Heavy grain	Apr 21/30, 2023	66,000	40.60
Brazil	Vietnam	Heavy grain	Apr 11/29, 2023	66,000	37.00
Australia	Vietnam	Heavy grain	Feb 24/Apr 9, 2023	60,000	20.80

*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;

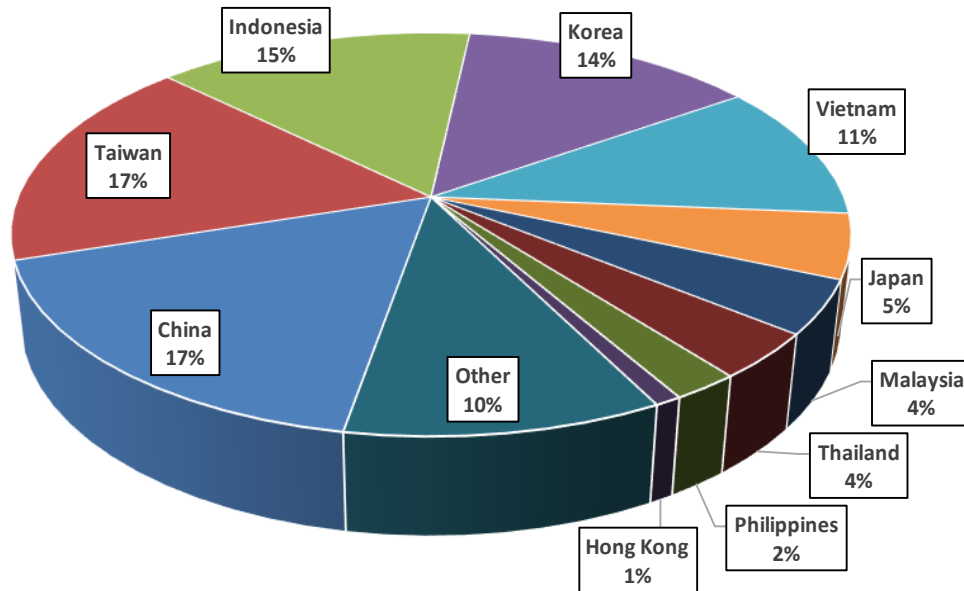
op = option.

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-Dec 2022

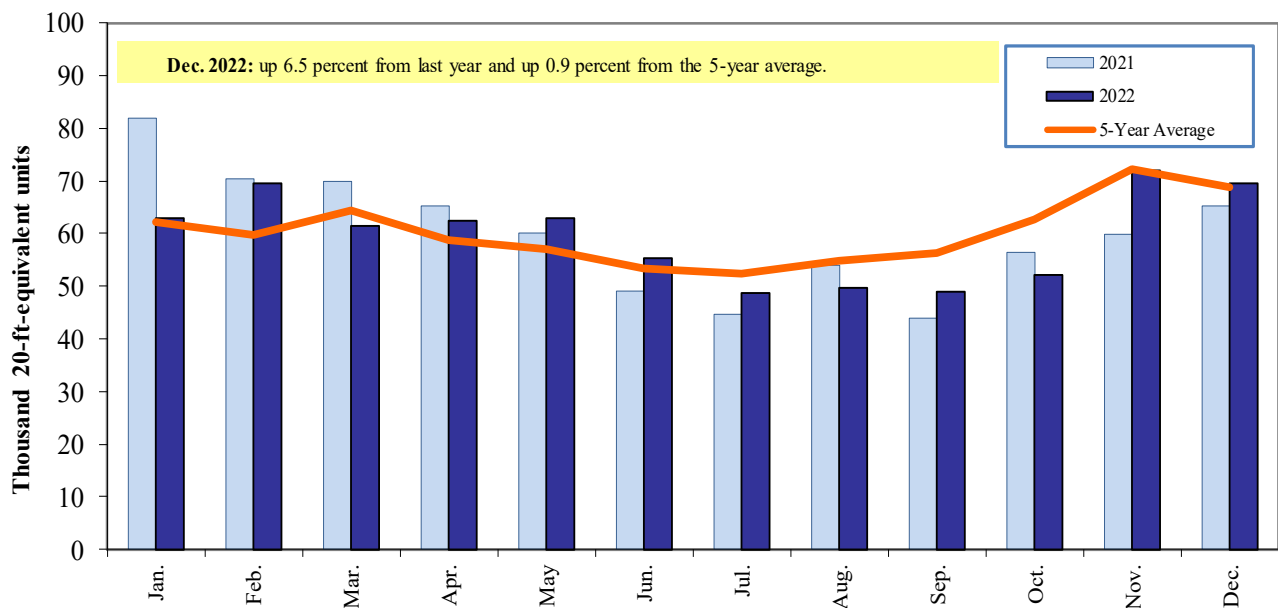


Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '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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