



Grain Transportation Report

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



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August 10, 2017

WEEKLY HIGHLIGHTS

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GAO Looks at Dredging Issues on the Lower Mississippi River

In July 2017, the General Accountability Office (GAO) released a report titled *Inland Harbors: The Corps of Engineers Should Assess Existing Capabilities to Better Inform Dredging Decisions* ([GAO-17-635](#)). The report addressed dredging issues at 13 inland ports on the Mississippi River between St. Louis, MO, and Baton Rouge, LA, which primarily move agricultural commodities (corn, soybeans, and rice), petroleum products, and crude materials (sand and gravel). GAO reported that funding constraints are a major issue that limits the U.S. Army Corps of Engineers (Corps) ability to fully address dredging needs at these 13 ports. The report revealed that some stakeholders believe the smaller ports are negatively affected by the Corps' emphasis on funding ports with higher tonnages. However, GAO stated in the report the Corps is statutorily required to examine dredging needs based upon national, regional, and local benefits; and to consider other factors beyond tonnage. GAO concluded by saying, "the Corps should inform Congress whether it can adapt its existing tools to address factors for allocating funds from the Harbor Maintenance Trust Fund, and the resources needed to do so."

Pacific Northwest Grain Inspections Continue to Increase

For the week ending August 3, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.3 million metric tons (mmt), up 9 percent from the previous week, down 24 percent from the same time last year, but 20 percent above the 3-year average. Compared to the previous week, grain inspections increased due to both regional and commodity upturns. For example, grain inspections in the Pacific Northwest (PNW) jumped 35 percent, while overall soybean inspections increased by 39 percent. Week-to-week inspections of grain remained unchanged for wheat and decreased 2 percent for corn. Mississippi Gulf inspections increased 6 percent from the previous week. Outstanding (unshipped) export sales continued to increase for wheat, but decreased for corn and soybeans.

West Coast Dockworkers Sign 3-year Contract Extension with PMA

On August 4, The International Longshore and Warehouse Union membership voted to ratify a 3-year contract extension with the Pacific Maritime Association (PMA). The contract extension covers workers at 29 ports in California, Oregon, and Washington. The newly ratified contract will raise wages, maintain health benefits, increase pensions from 2019 through 2022, and replace the current agreement, which was set to expire on July 1, 2019. The new contract extension will help maintain continuous transportation services of agricultural trade along the Pacific Coast.

Snapshots by Sector

Export Sales

For the week ending July 27, **unshipped balances** of wheat, corn, and soybeans totaled 16.3 mmt, down 23 percent from the same time last year. Net weekly **wheat export sales** were .146 mmt, down 71 percent from the previous week. Net **corn export sales** were .037 mmt, down 60 percent from the previous week, and net **soybean export sales** were .234 mmt, up 43 percent from the past week.

Rail

U.S. Class I railroads originated 20,725 **grain carloads** for the week ending July 29, up 2 percent from the previous week, down 16 percent from last year, and down 6 percent from the 3-year average.

Average August shuttle **secondary railcar** bids/offers per car were \$154 below tariff for the week ending August 3, up \$21 from last week, and \$750 lower than last year. Average non-shuttle secondary railcar bids/offers per car were \$150 below tariff, \$206 lower than last year. There were no non-shuttle bids/offers last week.

Barge

For the week ending August 5, **barge grain movements** totaled 848,330 tons, 4 percent higher than the last week, and down 25 percent from the same period last year.

For the week ending August 5, 541 grain barges **moved down river**, up 4 percent from last week, 633 grain barges were **unloaded in New Orleans**, down 1 percent from the previous week.

Ocean

For the week ending August 3, 37 **ocean-going grain vessels** were loaded in the Gulf, unchanged from the same period last year. Forty-six vessels are expected to be loaded within the next 10 days, 26 percent less than the same period last year.

For the week ending August 3, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$37 per metric ton, 1 percent less than the previous week. The cost of shipping from the PNW to Japan was \$19 per metric ton, 1 percent less than the previous week.

Fuel

During the week ending August 7, **average diesel fuel prices** increased 5 cents from the previous week to \$2.58 per gallon, 27 cents higher than the same week last year.

Feature Article/Calendar

Second Quarter Wheat Transportation Costs Increase

Second quarter 2017 transportation costs for shipping U.S. wheat from Kansas and North Dakota to Japan through the Pacific Northwest (PNW) and U.S. Gulf increased from the previous quarter and last year's second quarter. Quarter-to-quarter transportation costs increased due mainly to higher trucking and ocean rates, while year-to-year transportation costs increased primarily because of higher rail and ocean rates. Quarter-to-quarter total landed costs were also up for Kansas and North Dakota. Year-to-year landed costs for shipping wheat were mostly up as well, with the exception of wheat shipped from Kansas through the PNW, which were down slightly.

Quarter-to-quarter transportation costs for shipping wheat from Kansas and North Dakota through the PNW increased 3 percent. Quarter-to-quarter transportation costs for shipping wheat from Kansas to the Gulf increased 4 percent, and North Dakota costs increased 3 percent. Quarter-to-quarter total landed costs for shipping wheat from Kansas were up due to higher transportation costs and increasing farm values. Year-to-year transportation costs for shipping wheat from Kansas through the PNW were up 10 percent, and North Dakota costs for shipping through the PNW were up 9 percent. Year-to-year landed costs increased mainly due to higher rail and ocean rates.

Table 1: Quarterly rate comparisons for shipping Kansas & North Dakota wheat to Japan through the PNW

Mode	Kansas					North Dakota				
	2016	2017	2017	Year-to-Year	Quarterly	2016	2017	2017	Year-to-Year	Quarterly
	2nd qtr	1st qtr	2nd qtr	change	change	2nd qtr	1st qtr	2nd qtr	change	change
			\$/metric ton	%	%			\$/metric ton	%	%
Truck	12.10	11.14	12.30	1.65	10.41	12.10	11.14	12.30	1.65	10.41
Rail ¹	54.40	57.41	58.19	6.97	1.36	53.22	55.67	55.92	5.07	0.45
Ocean vessel	15.50	19.02	19.98	28.90	5.05	15.50	19.02	19.98	28.90	5.05
Transportation Costs	82.00	87.57	90.47	10.33	3.31	80.82	85.83	88.20	9.13	2.76
Farm Value ²	143.67	125.54	134.36	-6.48	7.03	171.35	180.78	183.72	7.22	1.63
Total Landed Cost	225.67	213.11	224.83	-0.37	5.50	252.17	266.61	271.92	7.83	1.99
Transport % of landed cost	36.34	41.09	40.24			32.05	32.19	32.44		

Table 2: Quarterly rate comparisons for shipping Kansas & North Dakota wheat to Japan through the Gulf

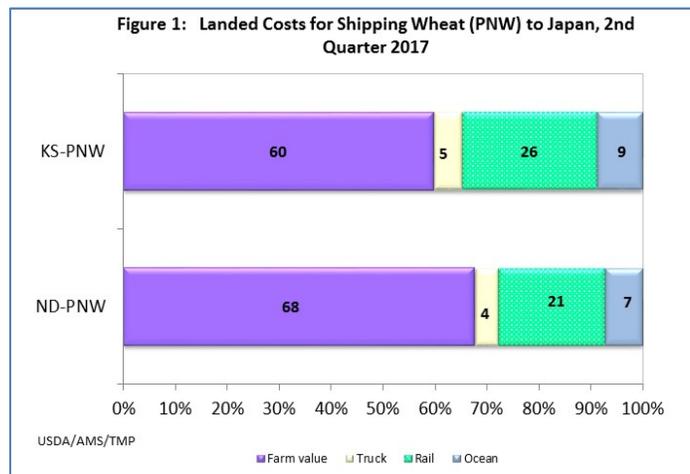
Mode	Kansas					North Dakota				
	2016	2017	2017	Year-to-Year	Quarterly	2017	2017	2017	Year-to-Year	Quarterly
	2nd qtr	1st qtr	2nd qtr	change	change	2nd qtr	1st qtr	2nd qtr	change	change
			\$/metric ton	%	%			\$/metric ton	%	%
Truck	12.10	11.14	12.30	1.65	10.41	12.10	11.14	12.30	1.65	10.41
Rail ¹	37.76	40.50	40.85	8.18	0.86	56.33	59.05	59.11	4.94	0.10
Ocean vessel	26.40	36.45	38.08	44.24	4.47	26.40	36.45	38.08	44.24	4.47
Transportation Costs	76.26	88.09	91.23	19.63	3.56	94.83	106.64	109.49	15.46	2.67
Farm Value ²	143.67	125.54	134.36	-6.48	7.03	171.35	180.78	183.72	7.22	1.63
Total Landed Cost	219.93	213.63	225.59	2.57	5.60	266.18	287.42	293.21	10.15	2.01
Transport % of landed cost	34.67	41.23	40.44			35.63	37.10	37.34		

Source: USDA/AMS/TMP

¹ Rail tariff rates include fuel surcharges and revisions for heavy axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car

² Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

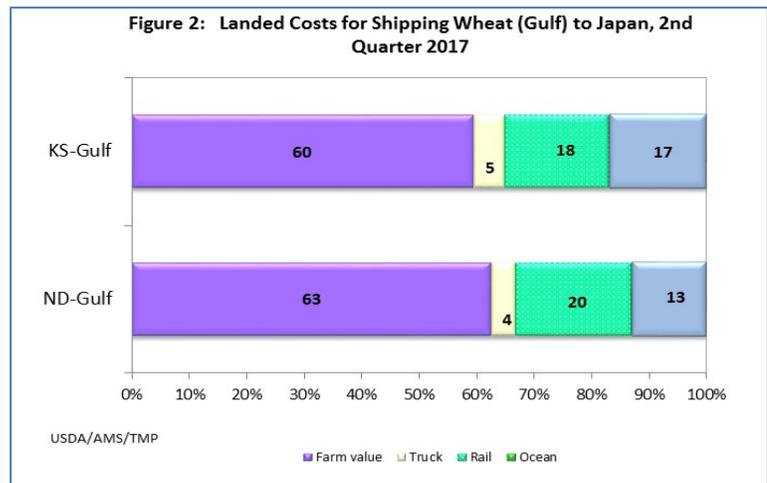
PNW Cost Analysis: The total landed cost (farm value plus transportation costs) to ship wheat from each State through the PNW ranged from averaged \$225 to \$272 per metric ton (mt) during the second quarter (see table 1). Quarter-to-quarter total landed costs for shipping wheat to Japan from the PNW increased 6 percent from Kansas and 2 percent from North Dakota (see table 1). Year-to-year landed costs to ship wheat from the PNW were down fractionally from Kansas, but costs increased 8 percent from North Dakota due to higher transportation costs and farm values. Rail's share of PNW total landed costs increased from last year



when shipping from Kansas but North Dakota's share remained the same. Farm values dropped to 60 percent of the landed cost for shipping from Kansas, but remained at 68 percent from North Dakota (see figure 1). Quarter-to-quarter ocean rates for shipping grain from the PNW to Japan increased 5 percent, due mainly to increased grain movements and vessel activity (*GTR dated 7/27/17*). PNW ocean rates jumped 44 percent from year to year due to increasing demand for grain. Quarter-to-quarter rail rates for shipping wheat from Kansas and North Dakota to the PNW were up 1 percent. Year-to-year rail rates to ship wheat to the PNW increased 7 percent from Kansas and 5 percent from North Dakota. Trucking rates increased 10 percent from quarter to quarter due to increased demand for wheat and increasing trucking activity. Year-to-year trucking rates were up 2 percent. Second quarter PNW transportation costs represented 32 to 40 percent of the total landed costs above last year for each State; slightly above the previous quarter for North Dakota, but below the previous quarter for Kansas (see table 1).

Gulf Cost Analysis: Quarter-to-quarter total landed costs to ship wheat to the Gulf from Kansas increased 6 percent while North Dakota landed costs increased 2 percent for the same period. Year-to-year landed costs for shipping wheat to Japan increased 3 percent from Kansas and 10 percent from North Dakota (see table 2). The total landed cost to ship from each State through the Gulf was \$226/mt to \$293/mt. Year-to-year wheat farm value's share of the Gulf's landed cost decreased to 60 percent for Kansas and 63 percent for North Dakota (see figure 2).

Quarter-to-quarter ocean rates for shipping wheat to Japan from the Gulf increased over 4 percent, and jumped 44 percent from year to year. Quarter-to-quarter rail rates for shipping wheat to the Gulf increased 1 percent from Kansas but rates remained unchanged from North Dakota. Year-to-year rail rates for shipping wheat from Kansas to the Gulf increased 8 percent, and rates from North Dakota increased 5 percent. Second quarter Gulf transportation costs represented 37 to 40 percent of the total landed costs, above last year for each State, below the previous quarter in Kansas, and slightly above the previous quarter from North Dakota (see table 2).



PNW vs. Gulf Cost Comparison: Quarter-to-quarter rail rates to ship wheat from Kansas and North Dakota increased slightly for all routes, except North Dakota to the Gulf. Year-to-year rail rates for shipping wheat from each State increased as well (see tables 1 and 2). Quarter-to-quarter ocean rates increased from each region also, and year-to-year ocean rates increased as well. U.S. ocean rates for shipping grain from the PNW and Gulf have been rising since the second quarter 2016. Quarter-to-quarter transportation costs and total landed costs for shipping wheat from North Dakota and Kansas from the PNW and Gulf increased about equally (tables 1, 2).

According to the USDA Grain Inspection, Packers and Stockyards Administration, second quarter wheat inspected for export to Japan totaled .857 million metric tons (mmt), 47 percent higher than the second quarter last year, and 42 percent above the first quarter 2017. Second-quarter wheat exports to Japan accounted for 10 percent of total second quarter wheat exports (9 mmt), which increased 48 percent from last year (*GTR July 20, 2017*). Japan was the second leading importer of U.S. wheat during the second quarter, next to Mexico. U.S. wheat exports rose despite increased competition from countries abroad. According to the USDA's *World Agricultural Supply and Demand Estimates* report in July, U.S. wheat exports for the 2017/18 marketing year are expected to increase 8 percent from the previous year.

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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail	Barge	Ocean	
		Unit Train	Shuttle	Gulf	Pacific
08/09/17	173	256	203	165	135
08/02/17	170	255	203	168	137

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); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)

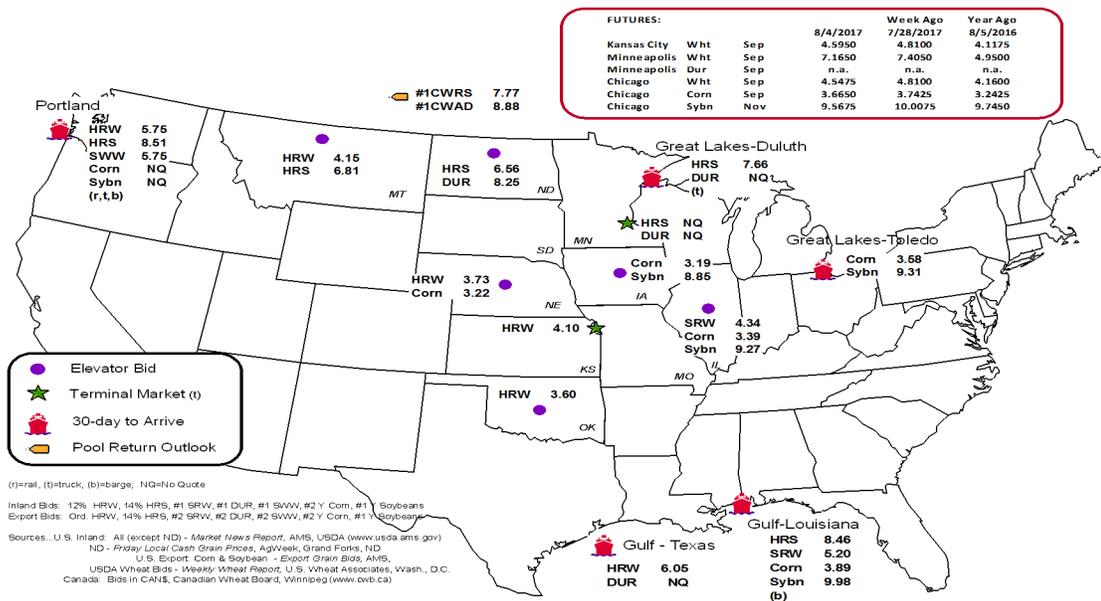
Commodity	Origin--Destination	8/4/2017	7/28/2017
Corn	IL--Gulf	-0.50	-0.46
Corn	NE--Gulf	-0.67	-0.65
Soybean	IA--Gulf	-1.13	-1.19
HRW	KS--Gulf	-1.95	-1.89
HRS	ND--Portland	-1.95	-2.14

Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1
Grain Bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico ³
08/02/2017 ^p	138	984	4,787	259	6,168	7/29/2017	2,355
07/26/2017 ^r	365	824	4,903	113	6,205	7/22/2017	2,570
2017 YTD ^r	15,732	53,869	180,466	12,341	262,408	2017 YTD	71,516
2016 YTD ^r	9,041	43,905	151,110	10,797	214,853	2016 YTD	63,559
2017 YTD as % of 2016 YTD	174	123	119	114	122	% change YTD	113
Last 4 weeks as % of 2016 ²	32	96	104	74	94	Last 4wks % 2016	119
Last 4 weeks as % of 4-year avg. ²	79	98	159	90	136	Last 4wks % 4 yr	142
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2016 and prior 4-year average.

³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

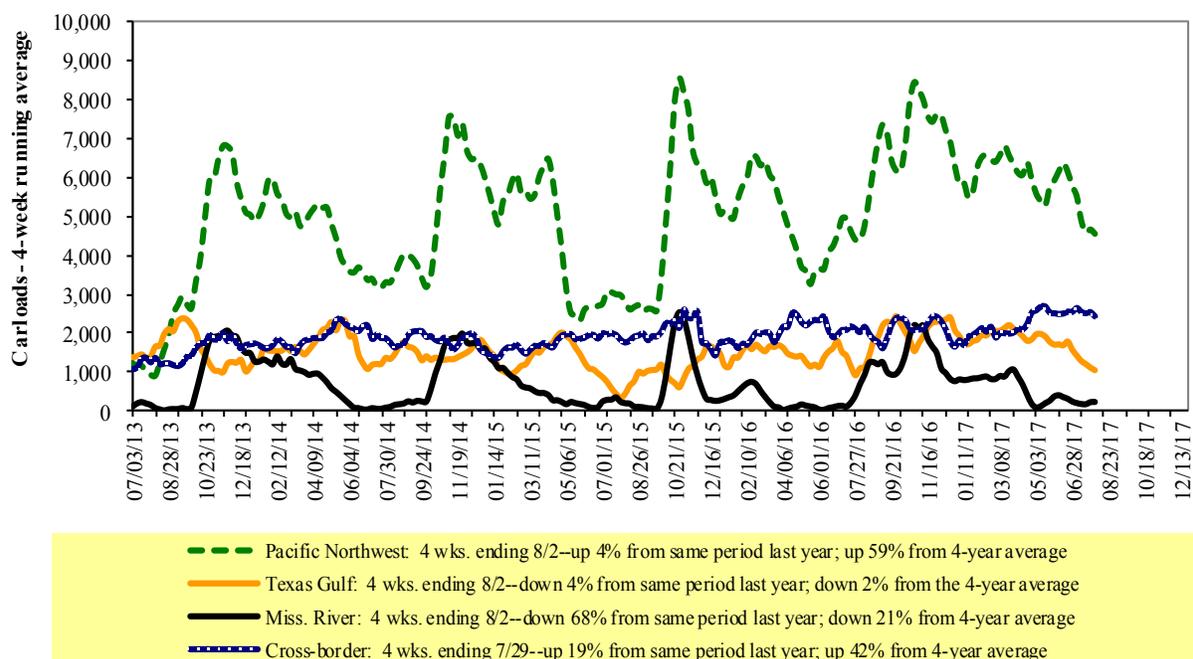
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

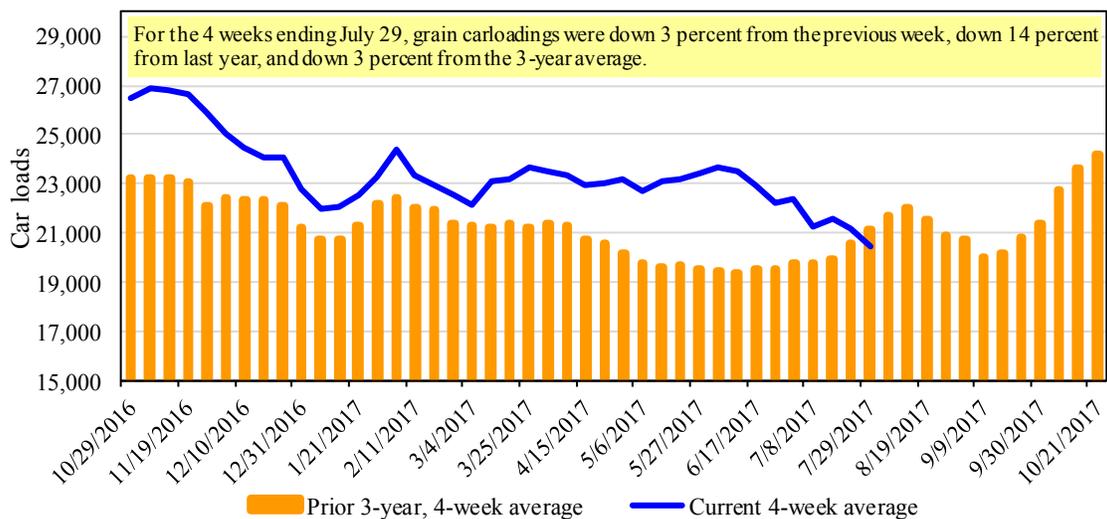
For the week ending: 7/29/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,302	2,738	10,876	1,146	4,663	20,725	3,860	4,190
This week last year	1,355	2,835	13,712	773	6,004	24,679	4,237	4,668
2017 YTD	51,870	83,926	342,303	28,400	175,721	682,220	113,820	135,224
2016 YTD	52,518	84,252	318,065	25,687	158,473	638,995	97,777	125,941
2017 YTD as % of 2016 YTD	99	100	108	111	111	107	116	107
Last 4 weeks as % of 2016*	91	98	80	96	91	86	92	105
Last 4 weeks as % of 3-yr avg**	73	102	99	106	96	97	86	98
Total 2016	95,179	151,010	590,779	45,246	300,836	1,183,050	193,935	234,738

*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.

Source: Association of American Railroads (www.aar.org)

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

For the week ending: 8/3/2017		Delivery period							
		Aug-17	Aug-16	Sep-17	Sep-16	Oct-17	Oct-16	Nov-17	Nov-16
BNSF ³	COT grain units	no bids	1	no bids	no bids	no offer	128	no bids	no bids
	COT grain single-car ⁵	0	250-253	0	77-211	0	93-153	0	21-201
UP ⁴	GCAS/Region 1	no bids	no offer	no bids	no offer	10	no offer	n/a	n/a
	GCAS/Region 2	no bids	no offer	10	no offer	51	no offer	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

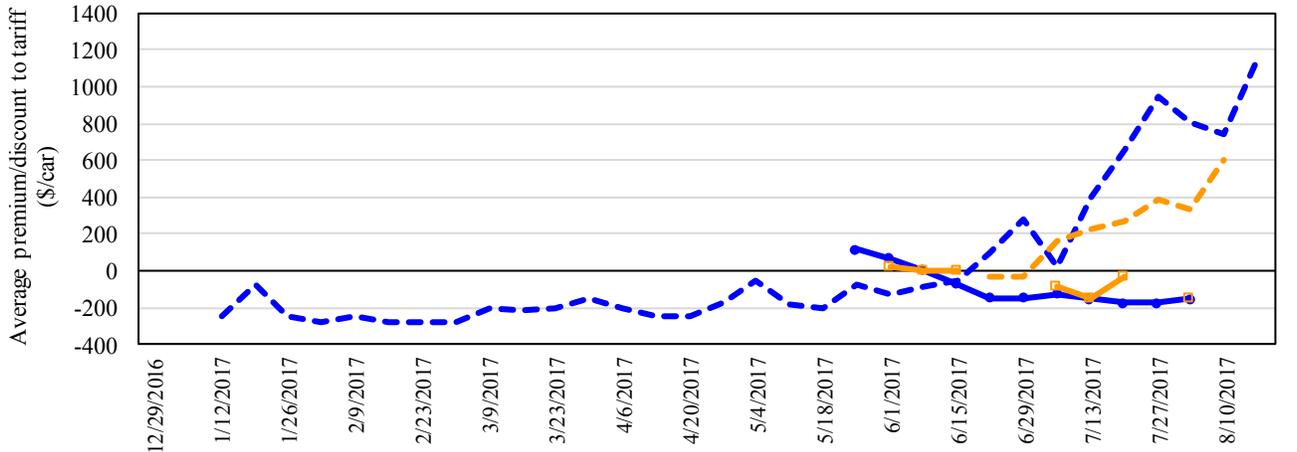
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

⁵Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4
Bids/Offers for Railcars to be Delivered in August 2017, Secondary Market

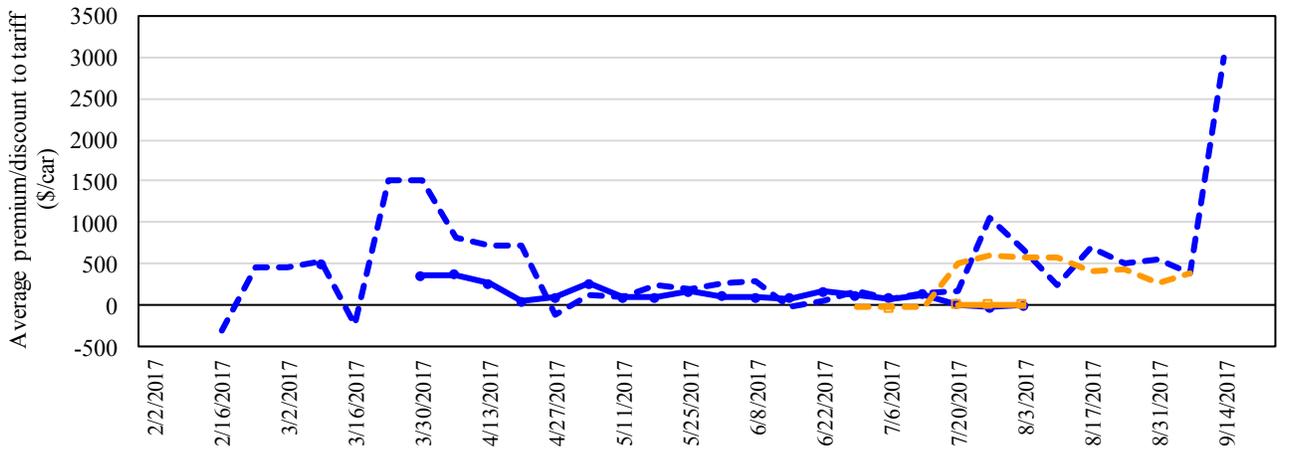


	8/3/2017	BNSF	UP
Non-Shuttle	n/a	-\$150	
Shuttle	-\$225		-\$83

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are \$175 below the peak. Average Shuttle bids/offers rose \$21 this week and are \$267 below the peak.

Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in September 2017, Secondary Market



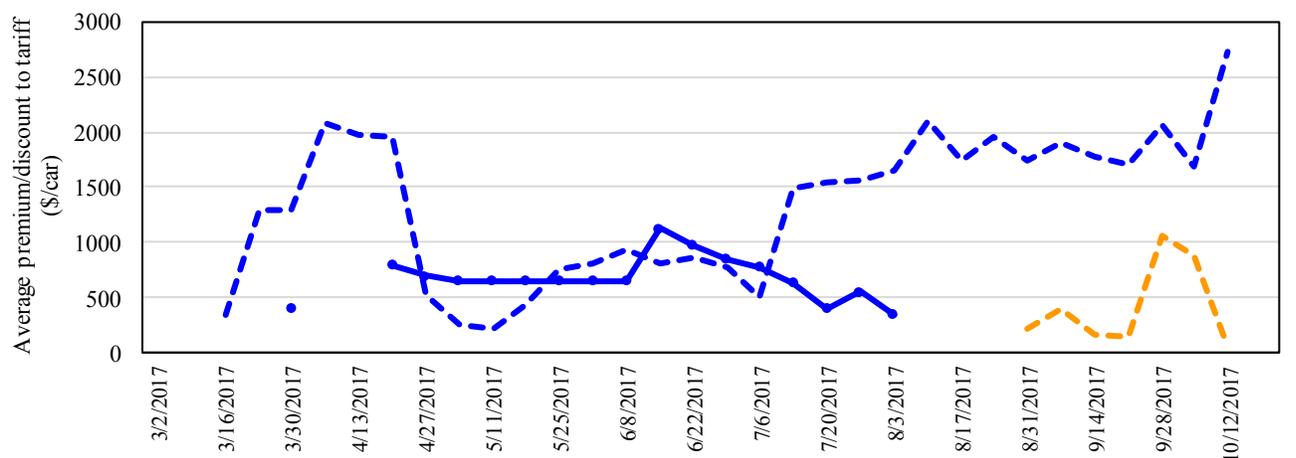
	8/3/2017	BNSF	UP
Non-Shuttle	\$0	\$0	
Shuttle	\$8		-\$17

Average Non-shuttle bids/offers are unchanged this week, and are at the peak. Average Shuttle bids/offers rose \$15 this week and are \$504 below the peak.

Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in October 2017, Secondary Market



8/3/2017	BNSF	UP	Shuttle	Non-Shuttle
Non-Shuttle	n/a	n/a	Shuttle prior 3-yr avg. (same week)	Non-Shuttle prior 3-yr avg. (same week)
Shuttle	n/a	\$350	There were no Non-Shuttle bids/offers this week. Average Shuttle bids/offers fell \$200 this week and are \$775 below the peak.	

Non-shuttle bids include unit-train and single-car bids. n/a = not available.
Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending: 8/3/2017		Delivery period					
		Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18
Non-shuttle	BNSF-GF	n/a	0	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 2016	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(150)	0	n/a	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2016	(288)	(138)	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(225)	8	n/a	0	n/a	n/a
	Change from last week	(50)	(17)	n/a	(100)	n/a	n/a
	Change from same week 2016	(1067)	(942)	n/a	(500)	n/a	n/a
	UP-Pool	(83)	(17)	350	200	n/a	n/a
	Change from last week	92	46	0	100	n/a	n/a
	Change from same week 2016	(433)	(367)	(150)	(300)	n/a	n/a

¹ Average premium/discount to tariff, \$/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

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

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute 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. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

August, 2017	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	\$3,883	\$46	\$39.01	\$1.06	8
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1
	Wichita, KS	New Orleans, LA	\$4,540	\$80	\$45.88	\$1.25	7
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5
	Northwest KS	Galveston-Houston, TX	\$4,816	\$88	\$48.70	\$1.33	7
	Amarillo, TX	Los Angeles, CA	\$5,021	\$122	\$51.07	\$1.39	7
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$91	\$37.45	\$0.95	1
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0
	Des Moines, IA	Davenport, IA	\$2,258	\$19	\$22.61	\$0.57	4
	Indianapolis, IN	Atlanta, GA	\$5,191	\$0	\$51.55	\$1.31	4
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	0
	Des Moines, IA	Little Rock, AR	\$3,534	\$56	\$35.65	\$0.91	3
	Des Moines, IA	Los Angeles, CA	\$5,202	\$164	\$53.29	\$1.35	4
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,634	\$60	\$36.68	\$1.00	-4
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	0
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	0
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	0
	Champaign-Urbana, IL	New Orleans, LA	\$4,495	\$91	\$45.54	\$1.24	3
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	8
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	0
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0
	Northwest KS	Portland, OR	\$5,812	\$144	\$59.15	\$1.61	7
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$91	\$35.47	\$0.90	1
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	3
	Des Moines, IA	Amarillo, TX	\$3,895	\$71	\$39.38	\$1.00	3
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0
	Council Bluffs, IA	Stockton, CA	\$4,740	\$0	\$47.07	\$1.20	2
	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	2
Soybeans	Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	3
	Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	2
	Council Bluffs, IA	New Orleans, LA	\$4,525	\$104	\$45.97	\$1.25	3
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0
	Grand Island, NE	Portland, OR	\$5,460	\$147	\$55.68	\$1.52	2

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 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 calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cn.ca, www.csx.com, www.up.com

Table 8

Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change ⁴ Y/Y	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ / bushel ³		
Date: August, 2017							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$63	\$68.39	\$1.86	2
	KS	Guadalajara, JA	\$7,309	\$246	\$77.19	\$2.10	7
	TX	Salinas Victoria, NL	\$4,292	\$37	\$44.24	\$1.20	4
Corn	IA	Guadalajara, JA	\$8,187	\$198	\$85.68	\$2.17	2
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	1
	NE	Queretaro, QA	\$7,909	\$125	\$82.09	\$2.08	1
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$122	\$75.51	\$1.92	1
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$209	\$90.48	\$2.46	1
	NE	Guadalajara, JA	\$8,942	\$212	\$93.53	\$2.54	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5
	KS	Torreon, CU	\$7,489	\$142	\$77.96	\$2.12	2
Sorghum	NE	Celaya, GJ	\$7,164	\$177	\$75.01	\$1.90	-1
	KS	Queretaro, QA	\$7,608	\$78	\$78.53	\$1.99	1
	NE	Salinas Victoria, NL	\$6,213	\$63	\$64.12	\$1.63	1
	NE	Torreon, CU	\$6,607	\$129	\$68.83	\$1.75	0

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.

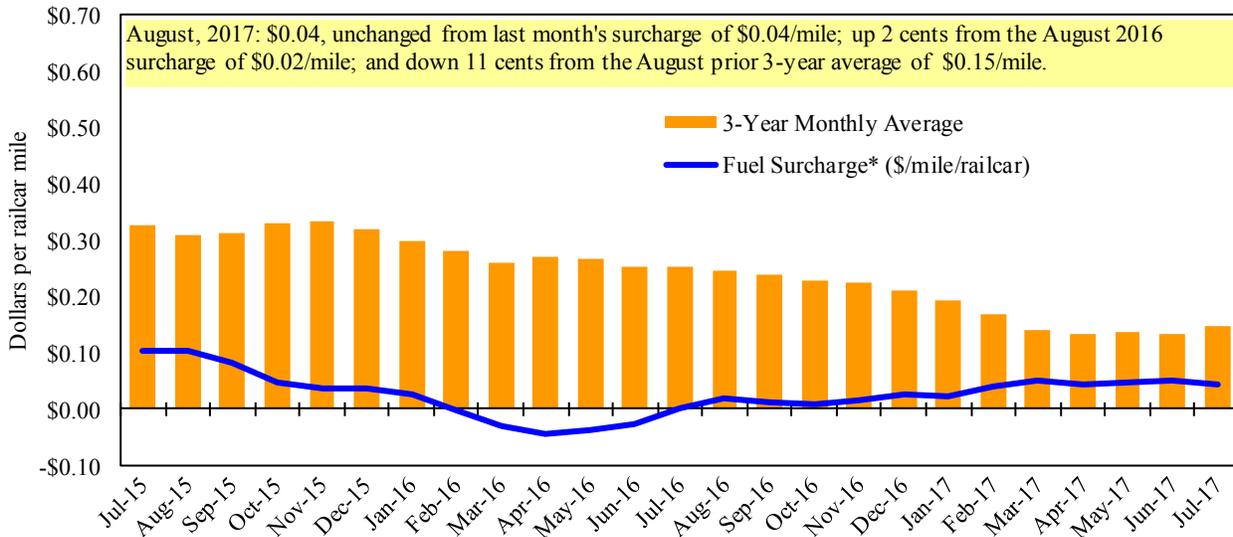
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹



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.

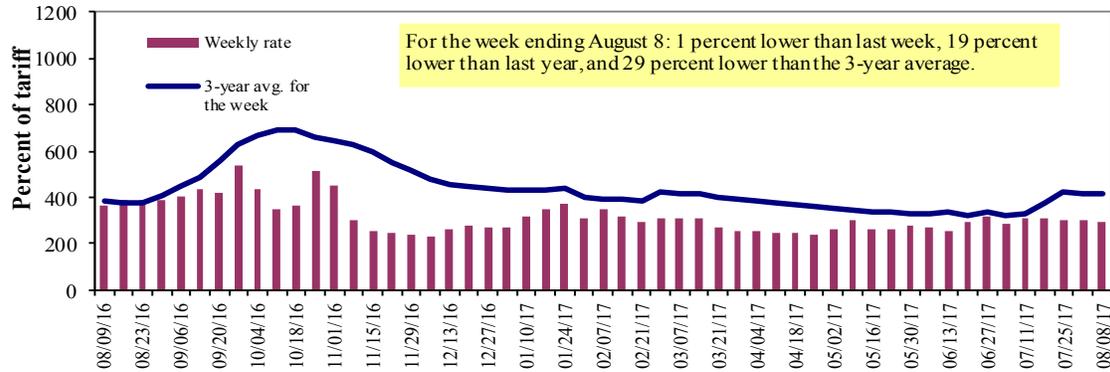
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

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: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	8/8/2017	328	295	295	200	248	248	170
	8/1/2017	353	298	298	210	254	254	185
\$/ton	8/8/2017	20.30	15.69	13.69	7.98	11.63	10.02	5.34
	8/1/2017	21.85	15.85	13.83	8.38	11.91	10.26	5.81
Current week % change from the same week:								
	Last year	-31	-25	-19	-27	-18	-18	-31
	3-year avg. ²	-35	-32	-29	-37	-29	-29	-40
Rate¹	September	368	332	338	260	313	313	225
	November	430	340	340	275	332	332	229

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$$

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

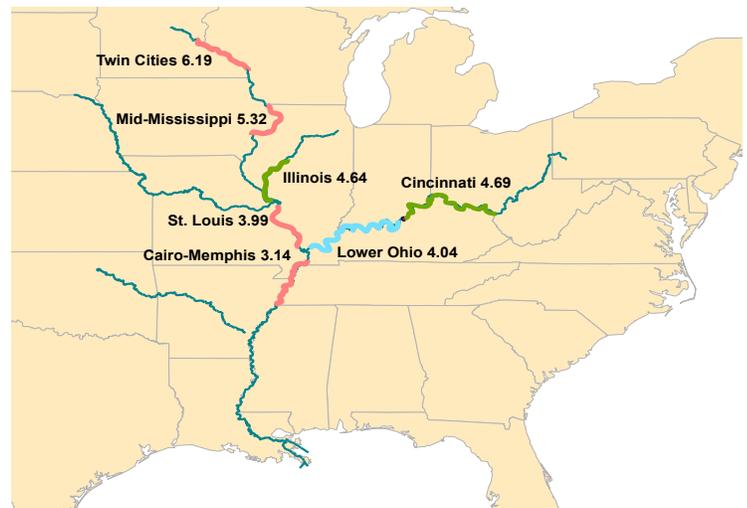
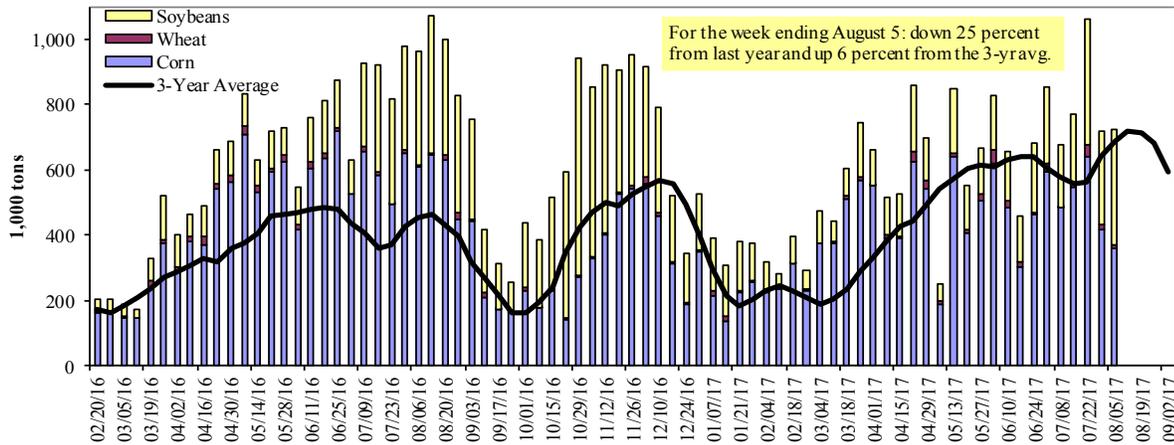


Figure 10

Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



¹ The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 8/5/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	340	13	262	9	624
Winfield, MO (L25)	294	6	214	8	523
Alton, IL (L26)	404	10	375	8	797
Granite City, IL (L27)	360	10	355	8	733
Illinois River (L8)	90	3	108	0	201
Ohio River (L52)	23	22	36	0	82
Arkansas River (L1)	0	32	1	0	34
Weekly total - 2017	383	64	393	8	848
Weekly total - 2016	648	64	406	6	1,124
2017 YTD ¹	15,177	1,499	7,729	192	24,596
2016 YTD	15,419	1,368	6,889	179	23,855
2017 as % of 2016 YTD	98	110	112	107	103
Last 4 weeks as % of 2016 ²	83	105	94	297	89
Total 2016	24,136	2,030	16,668	344	43,178

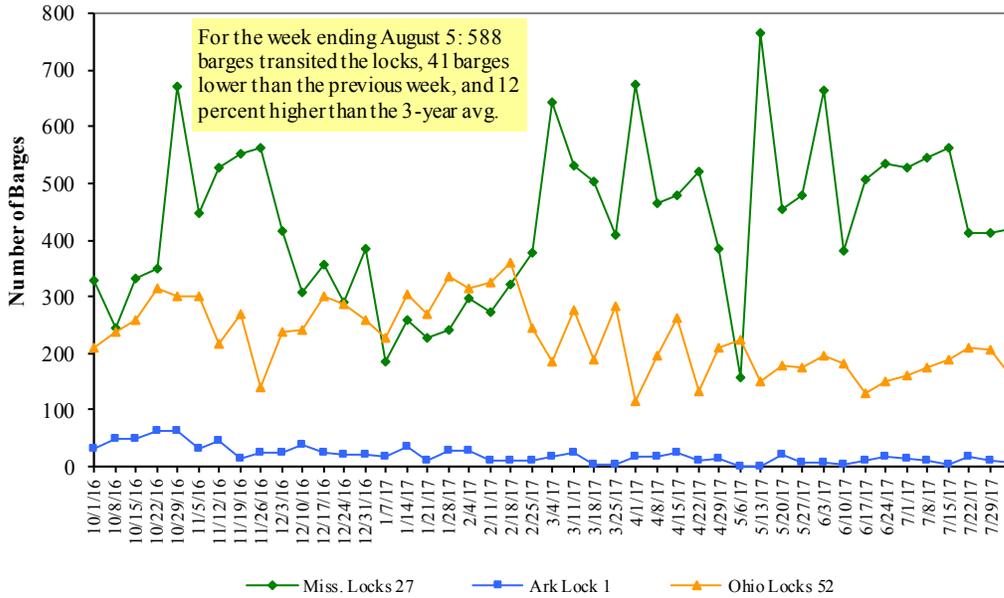
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

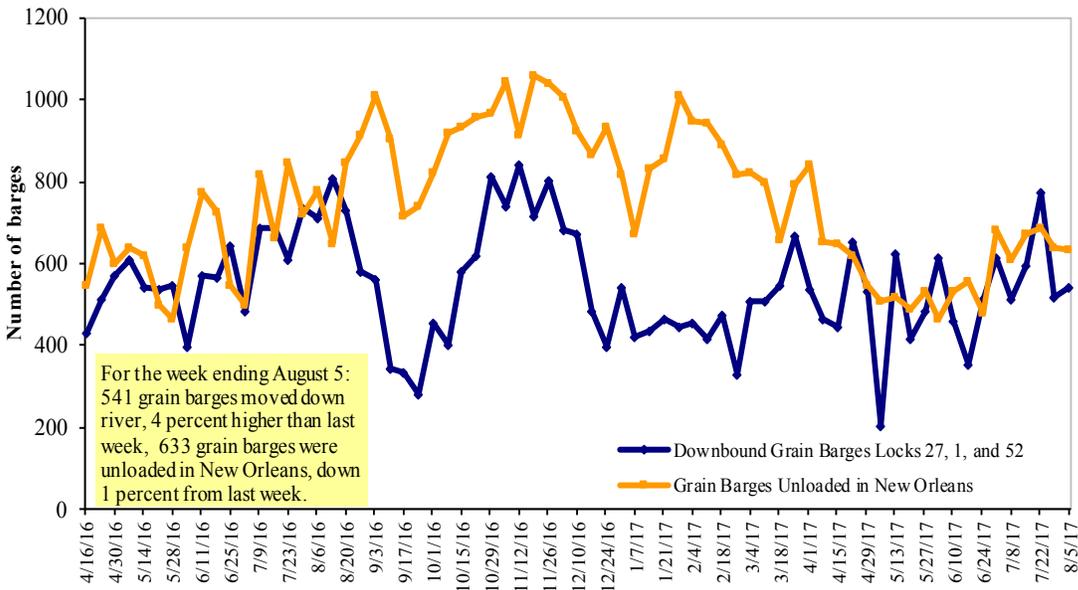
Source: U.S. Army Corps of Engineers

Figure 11
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 8/7/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.613	0.047	0.292
	New England	2.618	0.028	0.240
	Central Atlantic	2.751	0.045	0.339
	Lower Atlantic	2.514	0.052	0.273
II	Midwest ²	2.543	0.057	0.268
III	Gulf Coast ³	2.410	0.051	0.226
IV	Rocky Mountain	2.673	0.058	0.277
V	West Coast	2.848	0.032	0.253
	West Coast less California	2.747	0.043	0.293
	California	2.930	0.023	0.223
Total	U.S.	2.581	0.050	0.265

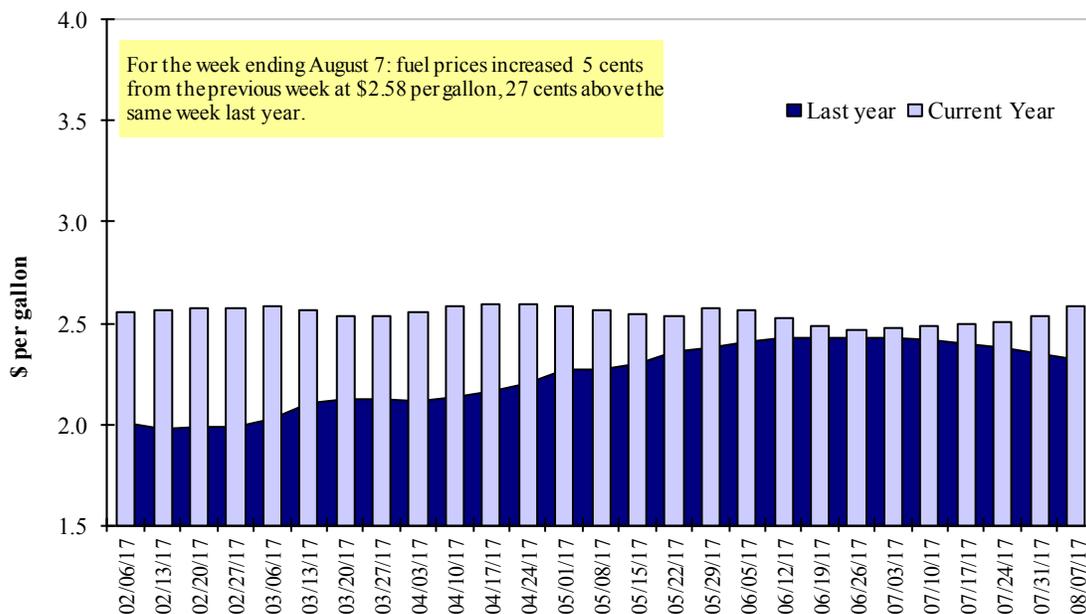
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Figure 13

Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

Grain Exports

Table 12

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									
7/27/2017	1,393	674	1,428	1,628	127	5,250	5,040	5,965	16,254
This week year ago	2,475	571	1,889	1,082	127	6,143	8,592	6,248	20,983
Cumulative exports-marketing year²									
2016/17 YTD	2,121	402	1,214	1,001	76	4,813	51,319	54,797	110,929
2015/16 YTD	1,550	378	1,356	635	26	3,946	40,443	46,181	90,570
YTD 2016/17 as % of 2015/16	137	106	89	157	298	122	127	119	122
Last 4 wks as % of same period 2015/16	64	121	78	153	100	90	74	103	88
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,487
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for wheat

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

Top 5 Importers¹ of U.S. Corn

For the week ending 7/27/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2017/18	2016/17	2015/16		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Mexico	2,268	13,763	12,687	8	11,204
Japan	647	11,958	10,523	14	11,284
Korea	1	5,645	2,990	89	3,931
Colombia	94	4,267	4,649	(8)	4,134
Peru	170	3,025	2,366	28	2,109
Top 5 Importers	3,180	38,658	33,215	16	32,662
Total US corn export sales	4,438	56,359	49,035	15	46,633
% of Projected	9%	100%	102%		
Change from prior week ²	438	37	331		
Top 5 importers' share of U.S. corn export sales	72%	69%	68%		70%
USDA forecast, July 2017	47,710	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, July 2017	139,700	138,430	132,690	5	

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query-- <http://www.fas.usda.gov/esquery/>. 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 - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 7/27/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2017/18	2016/17	2015/16		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	2,911	36,241	28,585	27	29,033
Mexico	428	3,707	3,306	12	3,295
Indonesia	26	2,351	1,964	20	2,065
Japan	289	2,248	2,219	1	1,994
Netherlands	0	1,864	1,590	17	1,644
Top 5 importers	3,654	46,411	37,664	23	38,032
Total US soybean export sales	6,393	60,761	52,429	16	48,389
% of Projected	11%	106%	99%		
Change from prior week ²	368	234	542		
Top 5 importers' share of U.S. soybean export sales	57%	76%	72%		79%
USDA forecast, July 2017	58,583	57,221	52,752	8	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carry over plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 7/27/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	910	830	10	2,620
Mexico	1,404	853	65	2,743
Philippines	1,132	876	29	2,395
Brazil	95	328	(71)	862
Nigeria	541	539	0	1,254
Korea	854	588	45	1,104
China	391	262	49	1,623
Taiwan	457	264	73	768
Indonesia	398	165	141	726
Colombia	253	317	(20)	635
Top 10 importers	6,434	5,023	28	14,729
Total US wheat export sales	10,063	10,089	(0)	24,485
% of Projected	38%	35%		
Change from prior week ²	146	327		
Top 10 importers' share of U.S. wheat export sales	64%	50%		60%
USDA forecast, July 2017	26,567	28,747	(8)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from the previous outstanding and/or accumulated sales³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port Regions	For the Week Ending 08/03/17	Previous Week ¹	Current Week as % of Previous	2017 YTD	2016 YTD	2017 YTD as % of 2016 YTD	Last 4-weeks as % of:		2016 Total
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	447	337	133	9,528	7,454	128	119	166	12,325
Corn	307	256	120	9,434	7,106	133	68	90	12,009
Soybeans	141	69	205	4,949	4,739	104	n/a	n/a	14,447
Total	895	662	135	23,911	19,299	124	92	132	38,782
Mississippi Gulf									
Wheat	54	99	54	2,930	2,214	132	113	79	3,480
Corn	466	551	85	20,723	19,309	107	79	92	31,420
Soybeans	512	327	157	13,474	12,374	109	68	147	35,278
Total	1,032	977	106	37,127	33,897	110	77	104	70,178
Texas Gulf									
Wheat	82	143	57	4,436	2,530	175	81	110	6,019
Corn	31	0	n/a	487	718	68	43	97	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
Total	113	143	79	4,922	3,340	147	71	108	8,792
Interior									
Wheat	18	22	84	1,118	770	145	155	152	1,543
Corn	150	163	92	4,901	4,172	117	113	128	7,197
Soybeans	62	92	67	2,920	2,430	120	94	157	4,577
Total	231	277	83	8,938	7,371	121	111	139	13,317
Great Lakes									
Wheat	15	13	112	395	417	95	41	49	1,186
Corn	0	0	n/a	115	219	52	0	0	584
Soybeans	0	3	0	187	148	126	37	94	910
Total	15	16	89	697	784	89	32	44	2,681
Atlantic									
Wheat	1	1	95	39	193	20	22	4	315
Corn	0	0	n/a	5	14	38	n/a	0	294
Soybeans	5	25	19	967	975	99	87	183	2,269
Total	6	26	22	1,011	1,182	86	77	42	2,878
U.S. total from ports²									
Wheat	617	615	100	18,446	13,579	136	106	123	24,867
Corn	955	970	98	35,664	31,537	113	77	93	53,173
Soybeans	720	517	139	22,497	20,759	108	75	161	58,587
Total	2,291	2,102	109	76,606	65,874	116	83	113	136,627

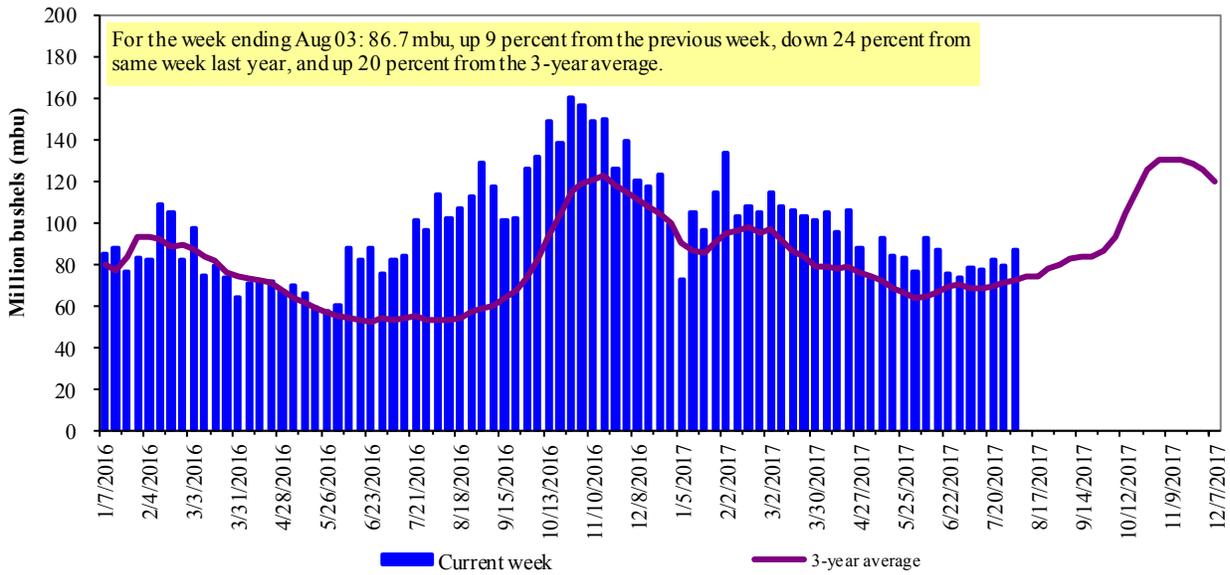
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 58 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2016.

Figure 14

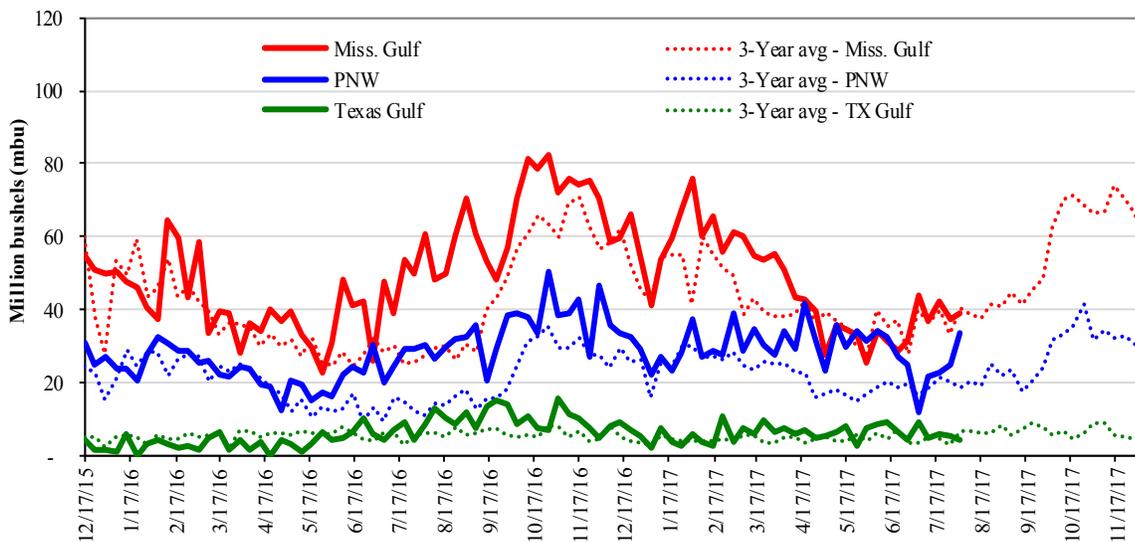
U.S. grain inspected for export (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)
 Note: 3-year average consists of 4-week running average

Figure 15

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



Week ending 08/03/17 inspections (mbu):		Percent change from:			
		MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	39.1	Last Week: up 5	down 19	up 2	up 35
PNW:	33.7	Last Year (same week): down 35	down 50	down 37	up 11
Texas Gulf:	4.3	3-yr avg. (4-wk. mov. Avg): up 5	down 9	up 3	up 71

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)
¹The 3-year average is based on a 4-week running average

Ocean Transportation

Table 17

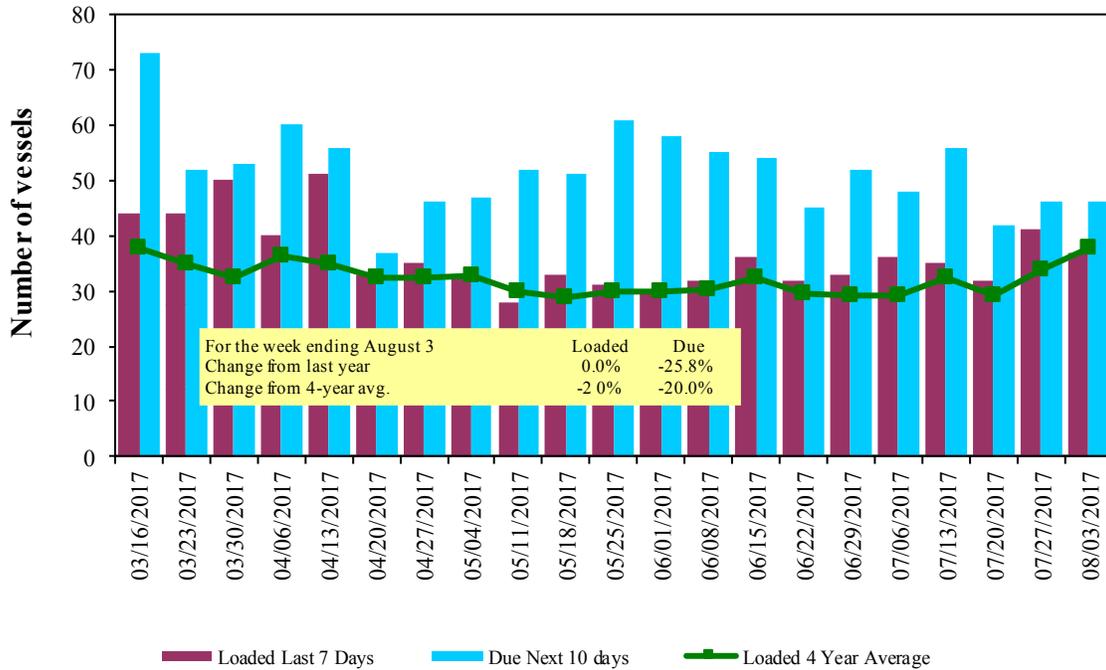
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/3/2017	43	37	46	12	n/a
7/27/2017	30	41	46	14	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg.	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

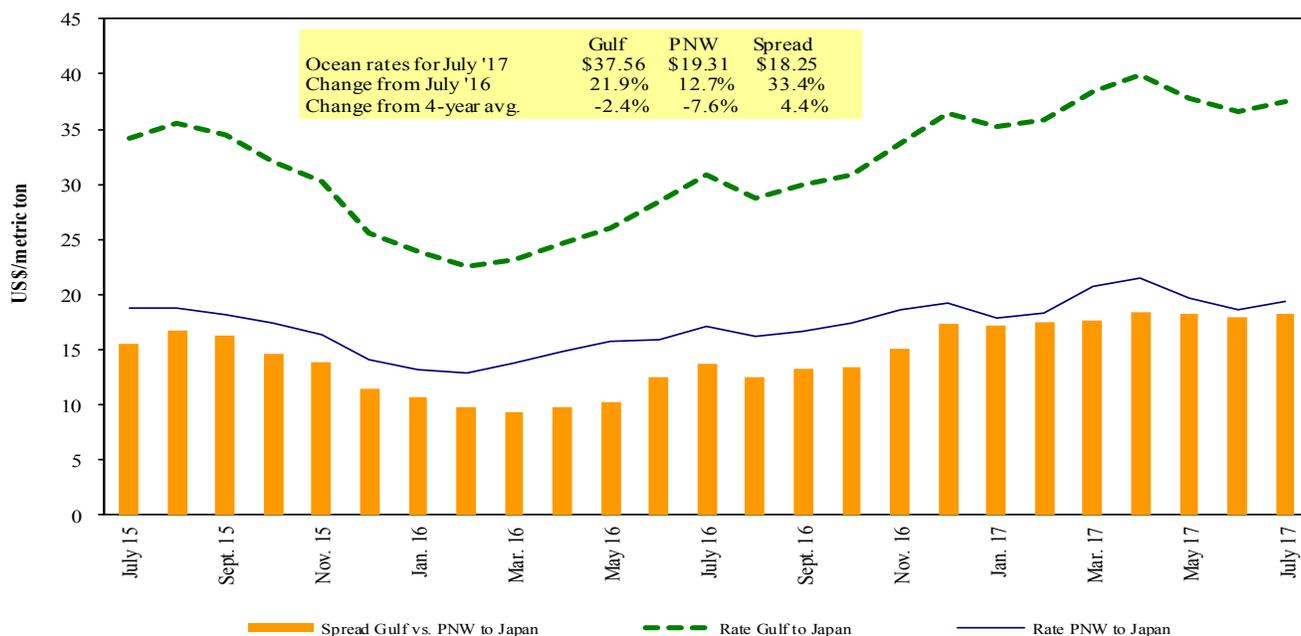
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
¹U.S. Gulf includes Mississippi, Texas, and East Gulf

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 08/05/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Aug 10/20	60,000	34.50
U.S. Gulf	China	Heavy Grain	Aug 1/5	60,000	33.75
U.S. Gulf	China	Heavy Grain	Jul 20/30	60,000	32.95
U.S. Gulf	China	Heavy Grain	Jul 15/25	60,000	33.65
U.S. Gulf	Cote d'Ivoire	Rice	Jun 19/29	6,000	93.33*
U.S. Gulf	Ghana	Rice	Jun 9/19	6,000	341.67*
U.S. Gulf	Ghana	Soybean Meal	Jun 9/19	5,000	86.75*
U.S. Gulf	Haiti	Wheat	Jul 3/13	20,000	80.00*
U.S. Gulf	Jordan	Wheat	Jun 19/28	50,000	36.00
PNW	Taiwan	Wheat	Jun 9/23	48,425	29.70
Brazil	China	Heavy Grain	Aug 1/10	60,000	27.25
Brazil	China	Heavy Grain	Jul 15/30	60,000	22.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.00
Brazil	China	Heavy Grain	Jul 1/5	60,000	22.25
Brazil	China	Heavy Grain	Jun 20/30	60,000	24.00
Brazil	China	Heavy Grain	Jun 10/20	60,000	24.75
Brazil	China	Heavy Grain	May 20/30	60,000	25.50
Brazil	Iran	Heavy Grain	Jun 15/18	70,000	22.75
Brazil	Malaysia	Heavy Grain	Aug 15/24	65,000	23.75
EC S. America	China	Heavy Grain	May 20/30	60,000	29.75

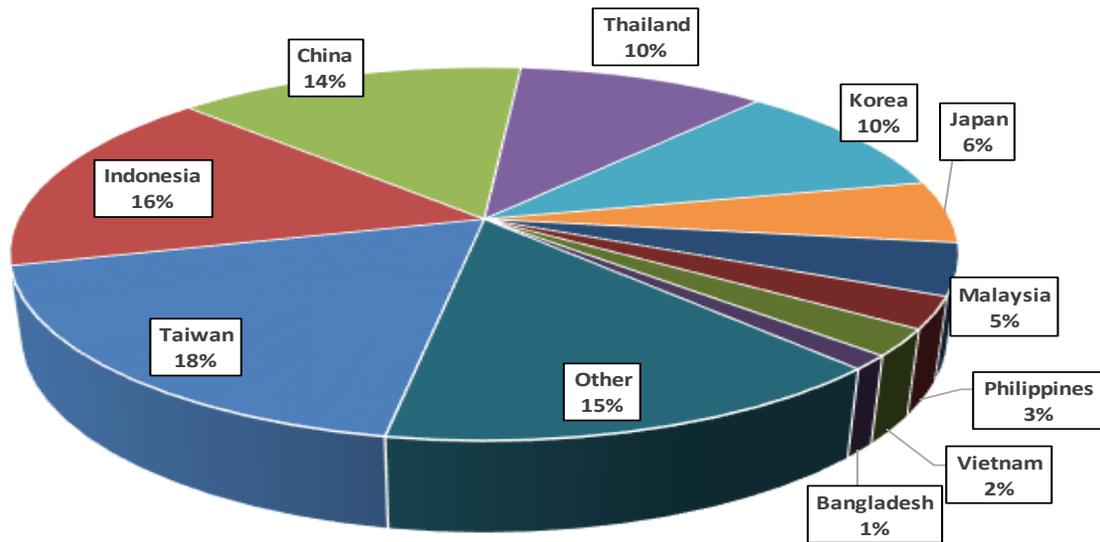
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

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

Source: Maritime Research Inc. (www.maritime-research.com)

In 2015, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 64 percent of U.S. waterborne grain exports in 2015 went to Asia, of which 12 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

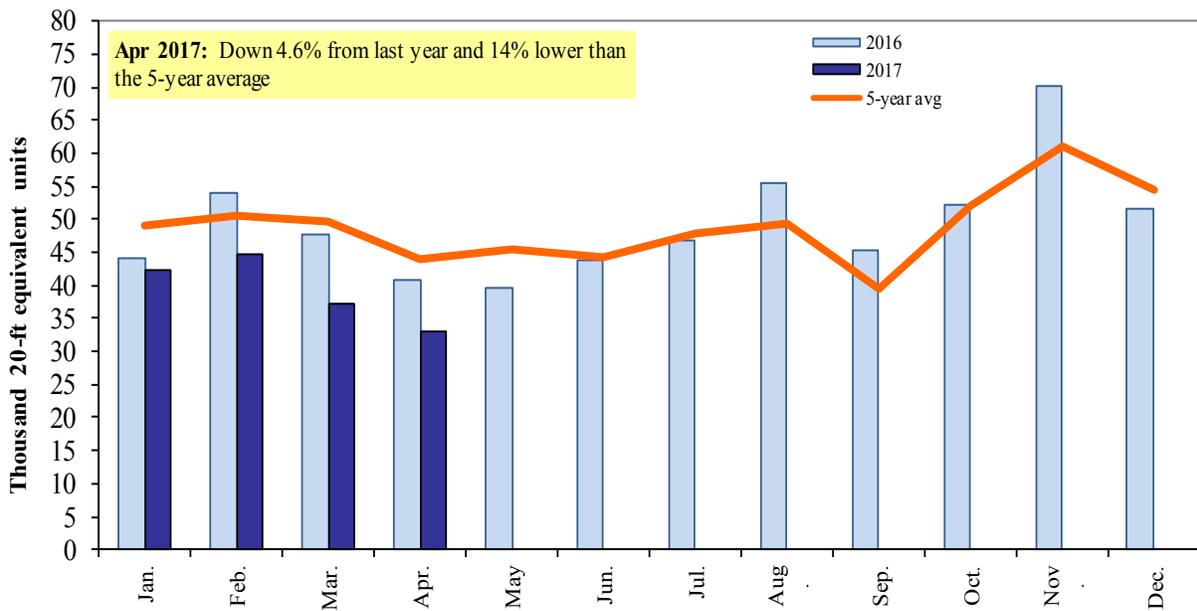
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-April 2017



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19
Monthly Shipments of Containerized Grain to Asia



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data.

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

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