



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

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Grain Inspections Continue to Fall but Wheat Increases

For the week ending August 9, **total inspections of grain** (corn, wheat, and soybeans), for export from all major U.S. export regions, reached 2.34 million metric tons (mmt); down 8 percent from the previous week, up 24 percent from last year, and 8 percent above the 3-year average. Wheat inspections jumped 42 percent from the previous week, but the increase could not offset the 35 percent drop in soybean inspections, the lowest since late June. Inspections of wheat for export increased to Asia and Latin America. Total grain inspections increased 3 percent from the past week, in the Pacific Northwest (PNW), while Mississippi Gulf inspections decreased 25 percent for the same period. Grain inspections, during the last four weeks, were up 20 percent from last year and 19 percent above the 3-year average.

CGB Finishes Facility Expansion Project

Last week, Consolidated Grain and Barge Co. (CGB) announced the completion of a \$32 million expansion project at its soybean processing facility, at the Port of Indiana (Mount Vernon). The project, first announced in the fall of 2016, more than doubles the size of the operation, which increases opportunities for Indiana's soybean farmers and CGB's agribusiness customers. The plant is the company's only soybean processing facility and has access to inbound/outbound barge, rail, and truck transportation, as well as outbound container shipping. Roughly 60 percent of the facility's volume is shipped by barge. The Evansville Western Railway, a Class III railroad, serves the port, connecting CGB and other shippers to the four U.S. Class I railroads—BNSF, CSX, Norfolk Southern, and Union Pacific.

Grain Barge Spot Rates Decline

As of August 14, barge spot rates for export grain dropped 1 to 13 percent, at principal origination points, compared to a week ago. Rates were elevated, in part, due to a several day closure of the main lock chamber at Melvin Price Locks and Dam, a critical portion of the Upper Mississippi River. With the reopening of the main chamber, barge operators can supply more barges to and from the Upper Mississippi and Illinois rivers. Delays are occurring on the Upper Mississippi River, north of Clinton, IA, as a result of low water. In addition, low water is delaying Illinois River barge traffic near Beardstown, IL. Traffic delays are reported at Ohio River Locks and Dam 52, Brookport, IL, where the smaller auxiliary chamber is closed due to high flows. Scheduled work on the main chamber at Locks and Dam 52 may result in a full closure for 2 days later in August.

Snapshots by Sector

Export Sales

For the week ending August 2, **unshipped balances** of wheat, corn, and soybeans totaled 17.1 mmt, up 16 percent from the same time last year. Net weekly **wheat export sales** were .317 mmt, down 17 percent from the previous week. Net **corn export sales** were .554 mmt, up 90 percent from the previous week. Net **soybean export sales** were .422 mmt, up notably from the previous week.

Rail

U.S. Class I railroads originated 25,060 **grain carloads** for the week ending August 4; up 3 percent from the previous week, up 20 percent from last year, and up 13 percent from the 3-year average.

Average August shuttle **secondary railcar** bids/offers per car were \$94 below tariff, for the week ending August 9; up \$77 from last week, and \$31 higher than last year. Average non-shuttle secondary railcar bids/offers per car were \$131 above tariff, down \$50 from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending August 11, **barge grain movements** totaled 942,372 tons, 16 percent higher than the previous week and up 1 percent from the same period last year.

For the week ending August 11, 605 grain barges **moved down river**, 99 barges more than the previous week. There were 667 grain barges **unloaded in New Orleans**, 9 percent lower than the previous week.

Ocean

For the week ending August 9, 31 **ocean-going grain vessels** were loaded in the Gulf, 11 percent more than the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days, 10 percent more than the same period last year.

For the week ending August 9, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.00 per metric ton, up 1 percent from the previous week. The cost of shipping from the PNW to Japan was \$24.25 per metric ton, unchanged from the previous week.

Fuel

For the week ending August 13, the U.S. average **diesel fuel price** decreased 0.6 cents from the previous week to \$3.217 per gallon, 61.9 cents above the same week last year.

Feature Article/Calendar

Second Quarter Wheat Transportation Costs Below Previous Quarter; Above Last Year

Transportation costs during the second quarter of 2018, increased from last year for shipping U.S. wheat from Kansas and North Dakota to Japan through the Pacific Northwest (PNW) and U.S. Gulf. Quarter-to-quarter transportation costs, however, were down slightly to the Pacific Northwest (PNW) and to the U.S. Gulf. Quarter-to-quarter landed costs (farm value plus transportation costs) for shipping wheat to Japan, increased from Kansas and dropped slightly from North Dakota. Year-to-year total landed costs for shipping wheat were up for Kansas and North Dakota (*see Tables 1 and 2*).

Quarter-to-quarter transportation costs for shipping wheat through the PNW decreased over 1 percent from Kansas and 2 percent from North Dakota. Quarter-to-quarter transportation costs for shipping wheat from Kansas and North Dakota through the U.S. Gulf, decreased 2 percent. Year-to-year transportation costs for shipping wheat from Kansas and North Dakota through the PNW were up 8 and 5 percent, respectively, and up 7 and 5 percent to the U.S. Gulf. Quarter-to-quarter total landed costs for shipping wheat from Kansas through the PNW and the U.S. Gulf increased primarily due to higher farm values, but landed costs from North Dakota through each region decreased slightly. Year-to-year landed costs for shipping wheat from Kansas through the PNW and U.S. Gulf, increased due to higher ocean rates and farm values. Total landed costs to ship from North Dakota, through each region, increased as well.

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

Mode	Kansas					North Dakota				
	2017 2nd qtr	2018 1st qtr	2018 2nd qtr	Year-to-Year change	Quarterly change	2017 2nd qtr	2018 1st qtr	2018 2nd qtr	Year-to-Year change	Quarterly change
			\$/metric ton	%	%			\$/metric ton	%	%
Truck	12.30	13.87	12.06	-1.95	-13.05	12.30	13.87	12.06	-1.95	-13.05
Rail ¹	58.19	60.42	60.73	4.37	0.51	55.92	55.67	55.72	-0.36	0.09
Ocean vessel	19.93	24.25	24.37	22.28	0.49	19.93	24.25	24.37	22.28	0.49
Transportation Costs	90.42	98.54	97.16	7.45	-1.40	88.15	93.79	92.15	4.54	-1.75
Farm Value ²	134.36	155.92	175.02	30.26	12.25	183.72	209.32	205.40	11.80	-1.87
Total Landed Cost	224.78	254.46	272.18	21.09	6.96	271.87	303.11	297.55	9.45	-1.83
Transport % of landed cost	40.23	38.73	35.70			32.42	30.94	30.97		

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

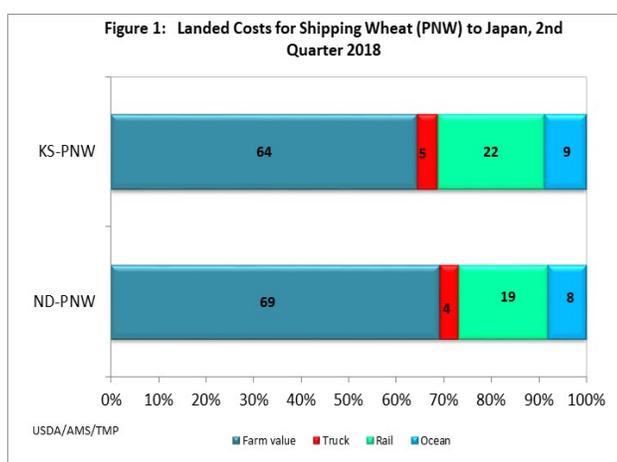
Mode	Kansas					North Dakota				
	2017 2nd qtr	2018 1st qtr	2018 2nd qtr	Year-to-Year change	Quarterly change	2017 2nd qtr	2018 1st qtr	2018 2nd qtr	Year-to-Year change	Quarterly change
			\$/metric ton	%	%			\$/metric ton	%	%
Truck	12.30	13.87	12.06	-1.95	-13.05	12.30	13.87	12.06	-1.95	-13.05
Rail ¹	40.85	41.42	41.83	2.40	0.99	59.11	58.90	58.90	-0.36	0.00
Ocean vessel	38.08	44.27	43.68	14.71	-1.33	38.08	44.27	43.68	14.71	-1.33
Transportation Costs	91.23	99.56	97.57	6.95	-2.00	109.49	117.04	114.64	4.70	-2.05
Farm Value ²	134.36	155.92	175.02	30.26	12.25	183.72	209.32	205.40	11.80	-1.87
Total Landed Cost	225.59	255.48	272.59	20.83	6.70	293.21	326.36	320.04	9.15	-1.94
Transport % of landed cost	40.44	38.97	35.79			37.34	35.86	35.82		

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)

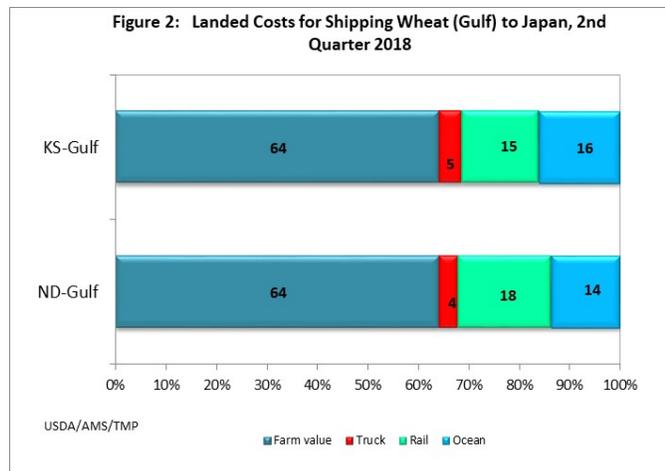
PNW Cost Analysis: During the second quarter, the total landed cost to ship wheat from each State—through the PNW—ranged from \$272 per metric ton (mt) to \$298 (*see table 1*). Quarter-to-quarter landed costs for shipping wheat to Japan from the PNW increased 7 percent from Kansas, but decreased 2 percent from North Dakota (*see table 1*). Year-to-year landed costs to ship wheat from the PNW, increased 21 percent from Kansas and 10 percent from North Dakota. This increase is due mainly to higher transportation costs and farm values. Rail's share of total landed costs to the PNW—from Kansas and North Dakota—decreased from last year. Second quarter farm values were 64 percent of the landed cost for shipping from Kansas and 69 percent



from North Dakota; both above the same time last year (see Figure 1 & Table 1). Quarter-to-quarter ocean rates for shipping grain from the PNW to Japan increased about 1 percent. Year-to-year PNW ocean rates increased 22 percent, due to high demand for coal during the second quarter (July 26, 2018 Grain Transportation Report (GTR)). Quarter-to-quarter rail rates for shipping wheat from Kansas to the PNW increased 1 percent. However, North Dakota rail rates to the PNW remained unchanged. Year-to-year rail rates to ship wheat to the PNW increased over 4 percent from Kansas, but remained unchanged from North Dakota. Trucking rates decreased 13 percent quarter-to-quarter, as demand for U.S. wheat remained low. Year-to-year trucking rates were down 2 percent. Transportation costs in the PNW in the second quarter represented 31 to 36 percent of the total landed costs (see table 1).

U.S. Gulf Cost Analysis: Quarter-to-quarter total landed costs to ship wheat through the U.S. Gulf from Kansas increased 7 percent, but decreased 2 percent from North Dakota. Year-to-year landed costs for shipping wheat to Japan increased 21 percent from Kansas and 9 percent from North Dakota (see table 2). The total landed cost to ship from each State through the U.S. Gulf ranged from \$273/mt to \$320/mt. Second quarter farm values were 64 percent of the U.S. Gulf’s landed cost from Kansas and North Dakota, also above the same time last year (see Figure 2 & Table 2).

Bulk ocean rates for shipping wheat to Japan from the U.S. Gulf decreased 1 percent from quarter to quarter, but increased 15 percent year to year, as demand for coal increased and demand for grain reached a record high (July 26, 2018 GTR). Quarter-to-quarter rail rates for shipping wheat to the U.S. Gulf increased 1 percent from Kansas, but rail rates remained unchanged from North Dakota. Year-to-year rail rates for shipping wheat from Kansas to the U.S. Gulf, increased 2 percent, but rail rates remained unchanged from North Dakota. Second quarter transportation costs from both Kansas and North Dakota to the U.S. Gulf represented 36 percent of the total landed costs and was below the previous quarter and last year (see table 2).



PNW vs. U.S. Gulf Cost Comparison: Quarter-to-quarter rail rates increased slightly to ship wheat from Kansas, but remained mostly unchanged to North Dakota. Year-to-year rail rates for shipping wheat from Kansas increased. Rail rates for North Dakota were unchanged (see tables 1 and 2). Quarter-to-quarter ocean rates increased slightly to ship wheat from the PNW, while rates decreased slightly from the U.S. Gulf. Year-to-year ocean rates, however, were up notably for the PNW and U.S. Gulf, due in part to increased demand for coal (July 26, 2018 GTR). Quarter-to-quarter transportation costs for shipping wheat to Japan, were down from each State. Total landed costs for shipping wheat increased for Kansas, but decreased for North Dakota (see tables 1, 2).

According to USDA’s Grain Inspection, Packers and Stockyards Administration, second quarter wheat inspected for export to Japan totaled .701 million metric tons (mmt), down 18 percent from last year and up 2 percent from the first quarter of 2018. Second-quarter wheat exports to Japan accounted for 13 percent of total second quarter wheat exports, which reached 5.4 mmt and is down 39 percent from last year (July 12, 2018 GTR). Japan continued as the second leading importer of U.S. wheat. During the second quarter, U.S. wheat exports were down due to a significant drop in production last year and increasing export competition. According to the USDA’s World Agricultural Supply and Demand Estimates report in July, U.S. wheat exports for the 2018/19 marketing year are expected to increase 8 percent from the previous year. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
08/15/18	216	285	212	292	197	172
08/08/18	216	288	209	331	196	172

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)

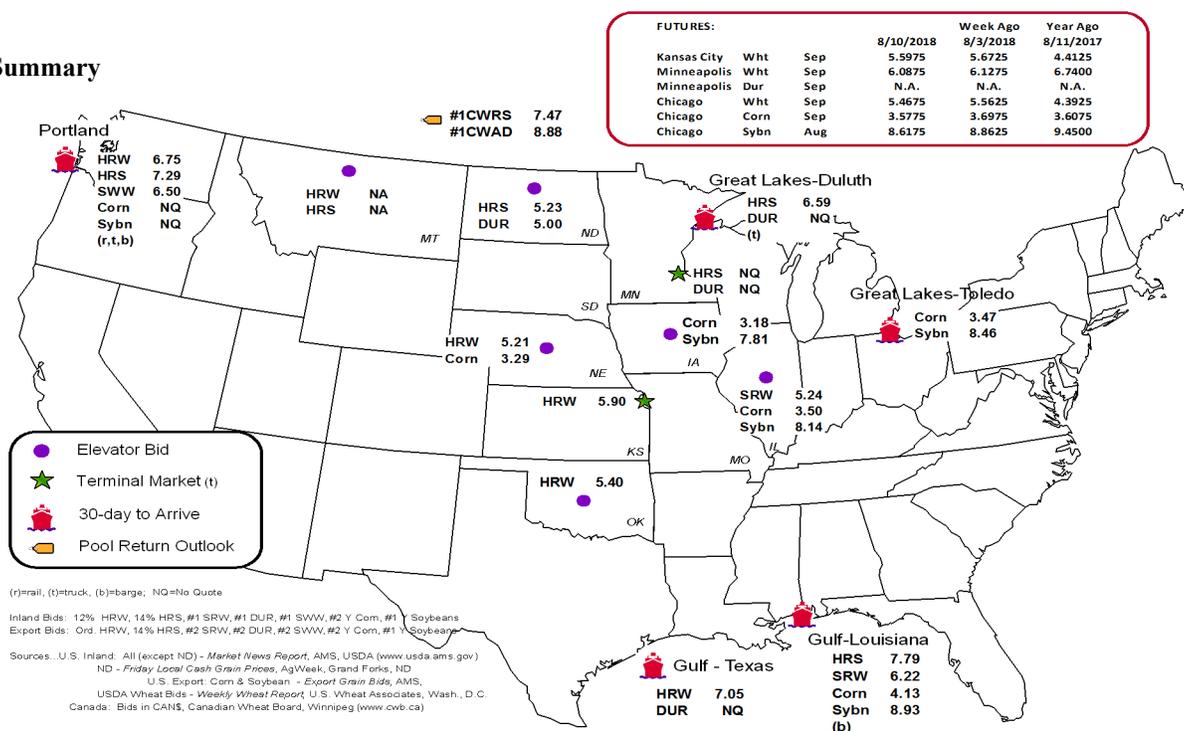
Commodity	Origin--Destination	8/10/2018	8/3/2018
Corn	IL--Gulf	-0.63	-0.89
Corn	NE--Gulf	-0.84	-0.83
Soybean	IA--Gulf	-1.12	-1.08
HRW	KS--Gulf	-1.15	-1.15
HRS	ND--Portland	-2.06	-1.85

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 Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
08/08/2018 ^p	429	332	5,058	307	6,126	8/4/2018	2,641
08/01/2018 ^r	433	719	5,724	431	7,307	7/28/2018	2,907
2018 YTD ^r	12,306	34,160	211,342	13,702	271,510	2018 YTD	73,226
2017 YTD ^r	16,070	54,976	185,365	12,578	268,989	2017 YTD	73,468
2018 YTD as % of 2017 YTD	77	62	114	109	101	% change YTD	100
Last 4 weeks as % of 2017 ²	102	41	129	179	114	Last 4wks % 2017	118
Last 4 weeks as % of 4-year avg. ²	76	41	160	196	133	Last 4wks % 4 yr	136
Total 2017	28,796	76,545	289,178	21,999	416,518	Total 2017	119,661
Total 2016	36,925	88,035	299,604	29,007	453,571	Total 2016	92,982

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2017 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 Grupo Mexico.

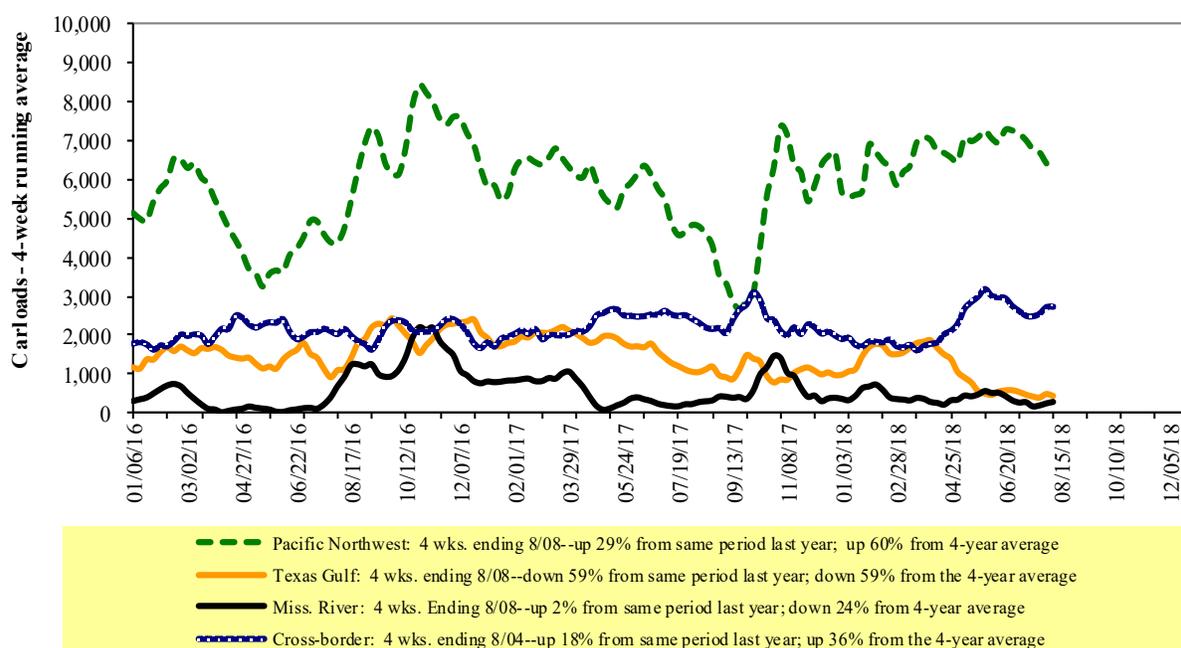
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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: 8/4/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,135	3,142	13,364	926	5,493	25,060	4,264	5,160
This week last year	1,563	2,828	9,976	747	5,742	20,856	3,673	3,994
2018 YTD	60,449	79,676	388,445	29,965	162,533	721,068	116,679	143,972
2017 YTD	53,433	86,851	352,279	29,147	181,463	703,173	117,291	139,220
2018 YTD as % of 2017 YTD	113	92	110	103	90	103	99	103
Last 4 weeks as % of 2017*	154	104	124	121	95	115	109	107
Last 4 weeks as % of 3-yr avg.**	131	103	116	121	95	110	101	107
Total 2017	89,465	142,826	578,964	50,223	289,574	1,151,052	198,582	244,766

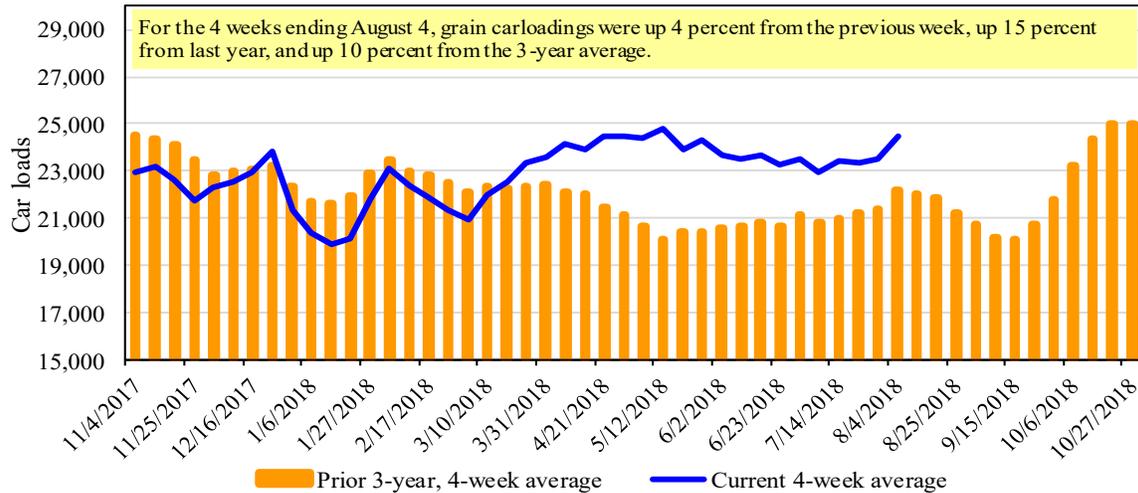
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 8/9/2018		Delivery period							
		Aug-18	Aug-17	Sep-18	Sep-17	Oct-18	Oct-17	Nov-18	Nov-17
BNSF ³	COT grain units	no offer	no bids	115	1	1	no offer	3	no bids
	COT grain single-car ⁵	no offer	1	162	0	135	0	85	0
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no bids	no bid	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	10	no offer	10	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.

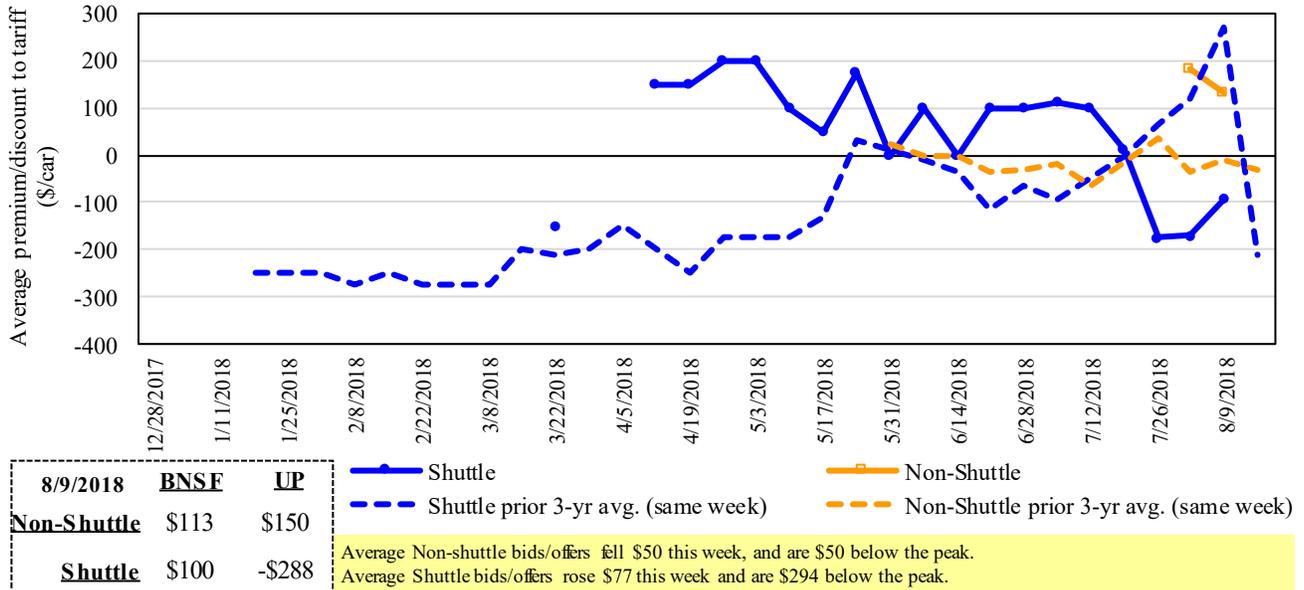
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

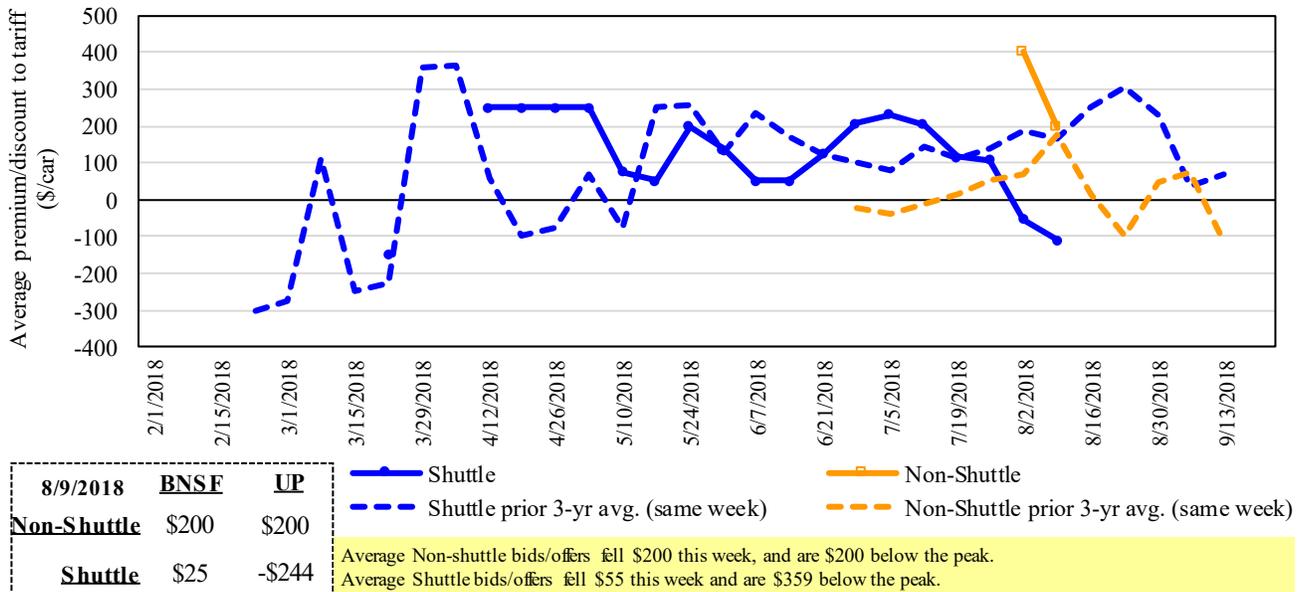
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in August 2018, Secondary Market



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

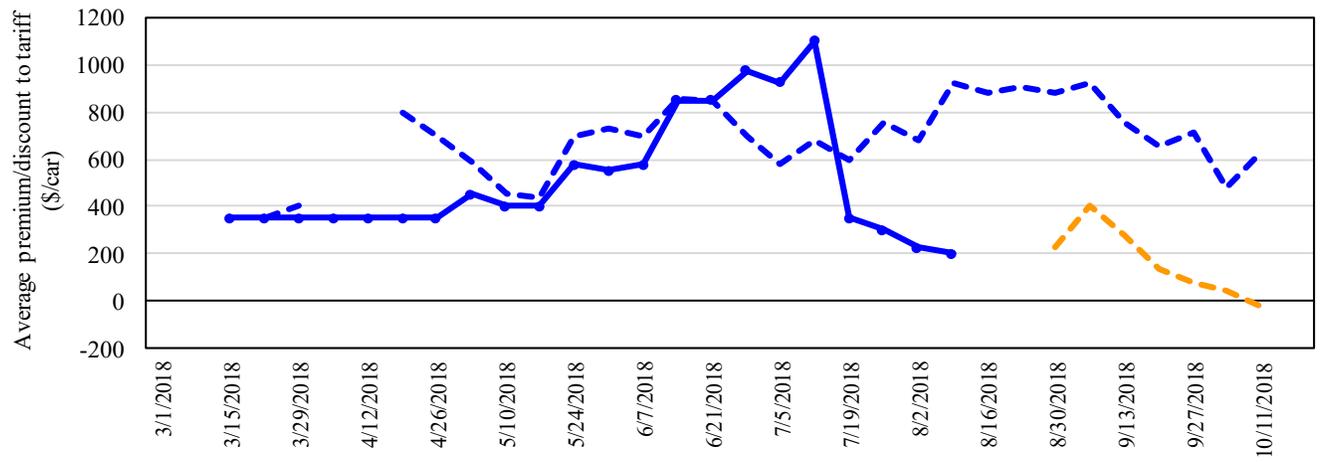
Figure 5
Bids/Offers for Railcars to be Delivered in September 2018, Secondary Market



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 2018, Secondary Market



8/9/2018	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	\$200	There were no Non-Shuttle bids/offers this week. Average Shuttle bids/offers fell \$25 this week and are \$900 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: 8/9/2018		Delivery period					
		Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19
Non-shuttle	BNSF-GF	113	200	n/a	n/a	n/a	n/a
	Change from last week	(212)	(200)	n/a	n/a	n/a	n/a
	Change from same week 2017	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	150	200	n/a	n/a	n/a	n/a
	Change from last week	112	n/a	n/a	n/a	n/a	n/a
Change from same week 2017	n/a	n/a	n/a	n/a	n/a	n/a	
Shuttle	BNSF-GF	100	25	n/a	n/a	n/a	n/a
	Change from last week	175	8	n/a	n/a	n/a	n/a
	Change from same week 2017	300	15	n/a	n/a	n/a	n/a
	UP-Pool	(288)	(244)	200	(25)	(25)	n/a
	Change from last week	(21)	(119)	50	(125)	(125)	n/a
Change from same week 2017	(238)	(219)	(163)	(225)	75	n/a	

¹Average 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, 2018	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel ²	Percent change Y/Y ⁴
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$121	\$40.76	\$1.11	4
	Grand Forks, ND	Duluth-Superior, MN	\$4,268	\$0	\$42.38	\$1.15	3
	Wichita, KS	Los Angeles, CA	\$7,175	\$0	\$71.25	\$1.94	2
	Wichita, KS	New Orleans, LA	\$4,540	\$214	\$47.21	\$1.28	3
	Sioux Falls, SD	Galveston-Houston, TX	\$6,911	\$0	\$68.63	\$1.87	2
	Northwest KS	Galveston-Houston, TX	\$4,816	\$234	\$50.15	\$1.36	3
	Amarillo, TX	Los Angeles, CA	\$5,121	\$326	\$54.09	\$1.47	6
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$241	\$41.43	\$1.05	11
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
	Des Moines, IA	Davenport, IA	\$2,258	\$51	\$22.93	\$0.58	1
	Indianapolis, IN	Atlanta, GA	\$5,446	\$0	\$54.08	\$1.37	5
	Indianapolis, IN	Knoxville, TN	\$4,540	\$0	\$45.08	\$1.15	5
	Des Moines, IA	Little Rock, AR	\$3,609	\$150	\$37.33	\$0.95	5
	Des Moines, IA	Los Angeles, CA	\$5,327	\$438	\$57.24	\$1.45	7
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$238	\$43.39	\$1.18	18
	Toledo, OH	Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5
	Indianapolis, IN	Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5
	Indianapolis, IN	Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$241	\$49.52	\$1.35	9
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$4,078	\$0	\$40.50	\$1.10	3
	Wichita, KS	Galveston-Houston, TX	\$4,296	\$0	\$42.66	\$1.16	3
	Chicago, IL	Albany, NY	\$5,663	\$0	\$56.24	\$1.53	3
	Grand Forks, ND	Portland, OR	\$5,736	\$0	\$56.96	\$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,056	\$0	\$60.14	\$1.64	2
	Northwest KS	Portland, OR	\$5,912	\$384	\$62.52	\$1.70	6
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	\$3,731	\$241	\$39.45	\$1.00	11
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0
	Des Moines, IA	Amarillo, TX	\$3,970	\$189	\$41.30	\$1.05	5
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0
	Council Bluffs, IA	Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
	Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0
	Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$278	\$50.18	\$1.37	9
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3
	Grand Island, NE	Portland, OR	\$5,710	\$393	\$60.60	\$1.65	9

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

Date: August, 2018			Fuel			Percent	
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,284	\$0	\$74.43	\$2.02	-2
	OK	Cuautitlan, EM	\$6,743	\$167	\$70.61	\$1.92	3
	KS	Guadalajara, JA	\$7,371	\$362	\$79.01	\$2.15	2
	TX	Salinas Victoria, NL	\$4,292	\$101	\$44.89	\$1.22	1
Corn	IA	Guadalajara, JA	\$8,313	\$338	\$88.39	\$2.24	3
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$343	\$85.39	\$2.17	4
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$335	\$78.82	\$2.00	4
	SD	Torreón, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$314	\$86.32	\$2.35	-5
	NE	Guadalajara, JA	\$8,692	\$345	\$92.33	\$2.51	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreón, CU	\$7,489	\$258	\$79.15	\$2.15	2
Sorghum	NE	Celaya, GJ	\$7,345	\$316	\$78.27	\$1.99	4
	KS	Queretaro, QA	\$7,819	\$209	\$82.03	\$2.08	4
	NE	Salinas Victoria, NL	\$6,452	\$168	\$67.63	\$1.72	5
	NE	Torreón, CU	\$6,790	\$250	\$71.93	\$1.83	5

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.

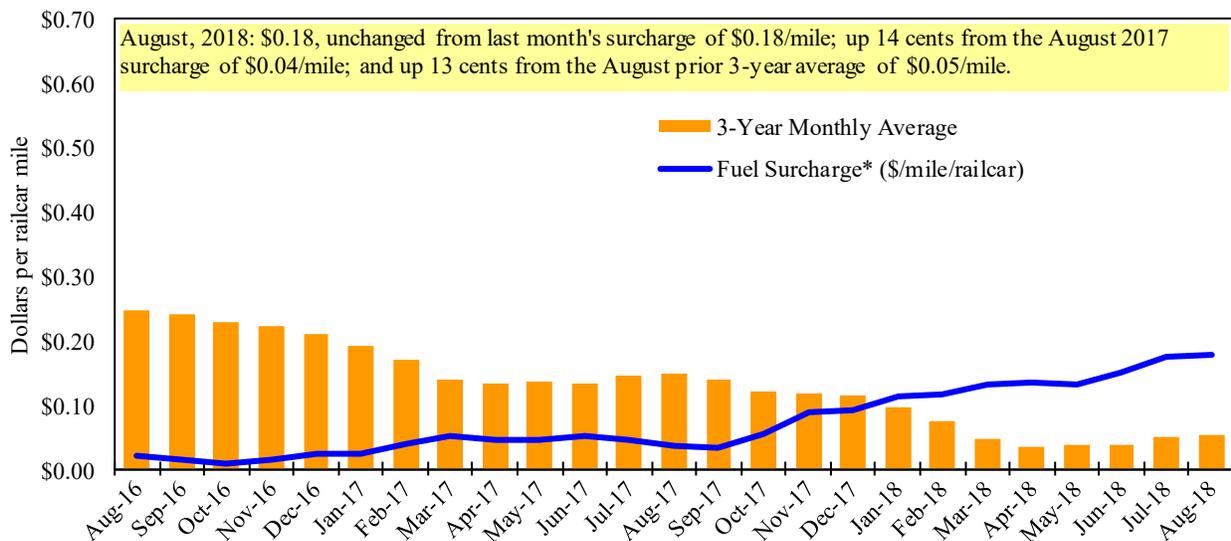
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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.

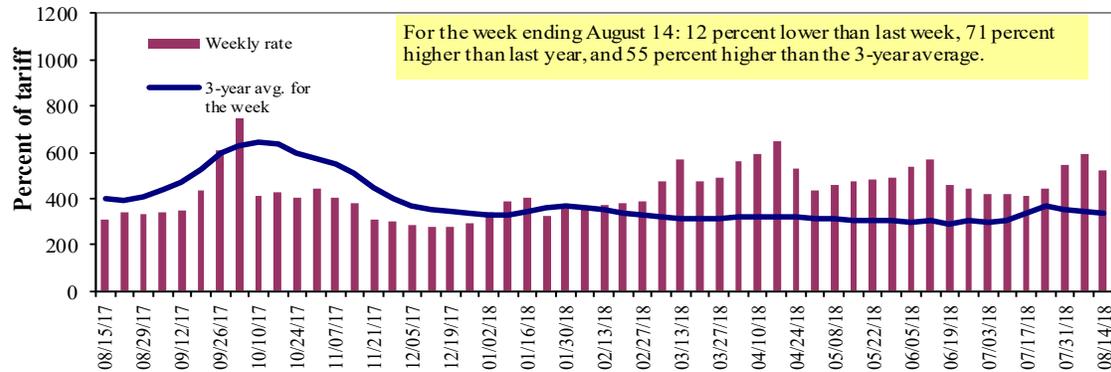
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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
Rate ¹	8/14/2018	588	525	525	350	413	413	345
	8/7/2018	650	595	595	400	443	443	350
\$/ton	8/14/2018	36.40	27.93	24.36	13.97	19.37	16.69	10.83
	8/7/2018	40.24	31.65	27.61	15.96	20.78	17.90	10.99
Current week % change from the same week:								
	Last year	44	71	71	67	65	65	86
	3-year avg. ²	42	49	55	41	45	45	54
Rate ¹	September	588	550	550	463	538	538	438
	November	563	475	455	395	438	438	375

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.

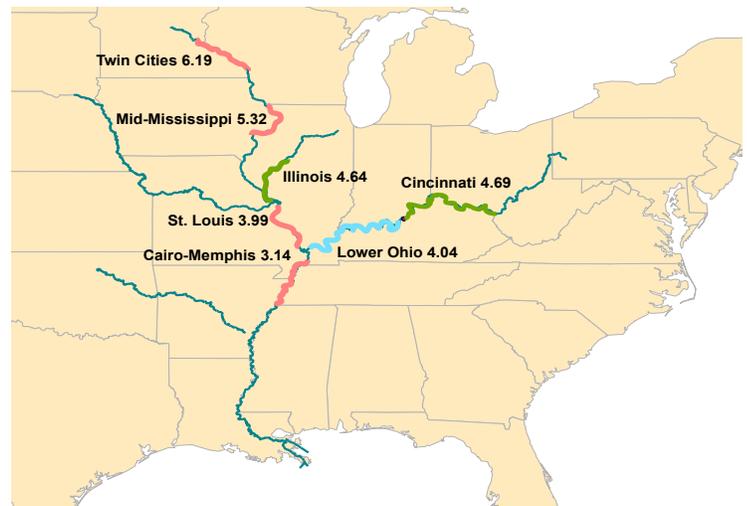
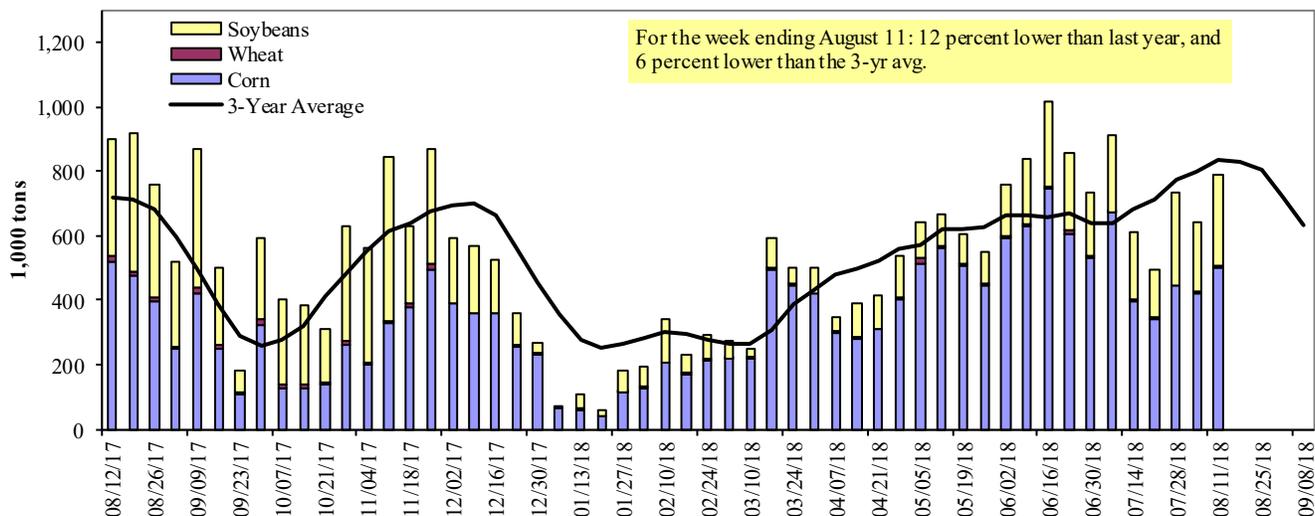


Figure 10

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 08/11/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	153	3	87	2	245
Winfield, MO (L25)	300	2	135	2	438
Alton, IL (L26)	572	2	297	3	873
Granite City, IL (L27)	504	2	284	3	792
Illinois River (L8)	88	0	51	0	138
Ohio River (L52)	48	7	50	0	105
Arkansas River (L1)	0	42	3	0	45
Weekly total - 2018	552	51	337	3	942
Weekly total - 2017	434	91	401	9	935
2018 YTD ¹	14,970	1,138	7,409	82	23,600
2017 YTD	15,611	1,590	8,130	201	25,531
2018 as % of 2017 YTD	96	72	91	41	92
Last 4 weeks as % of 2017 ²	100	64	74	43	86
Total 2017	22,242	2,210	16,123	360	40,936

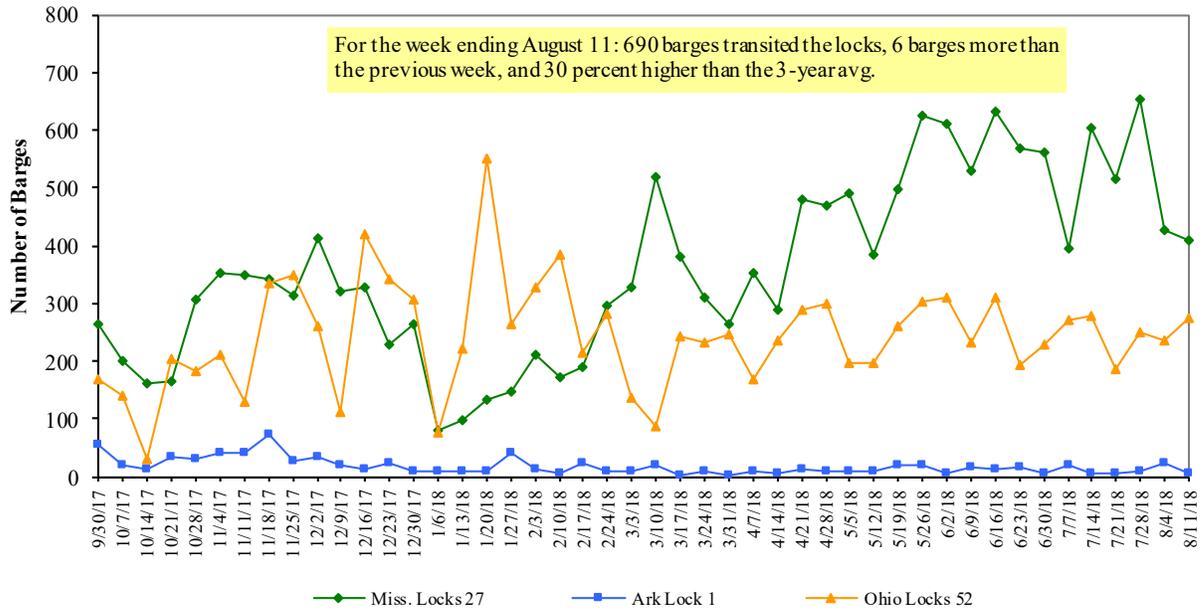
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2017.

Note: Total may not add exactly, due to rounding.

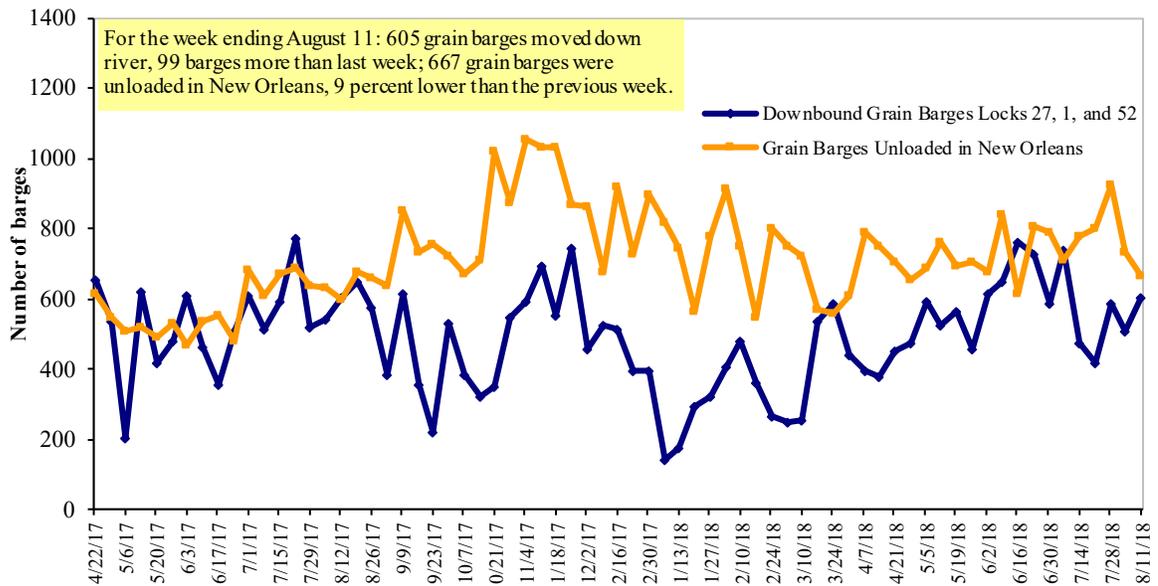
Source: U.S. Army Corps of Engineers

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 Prices, Week Ending 8/13/2018 (US \$/gallon)

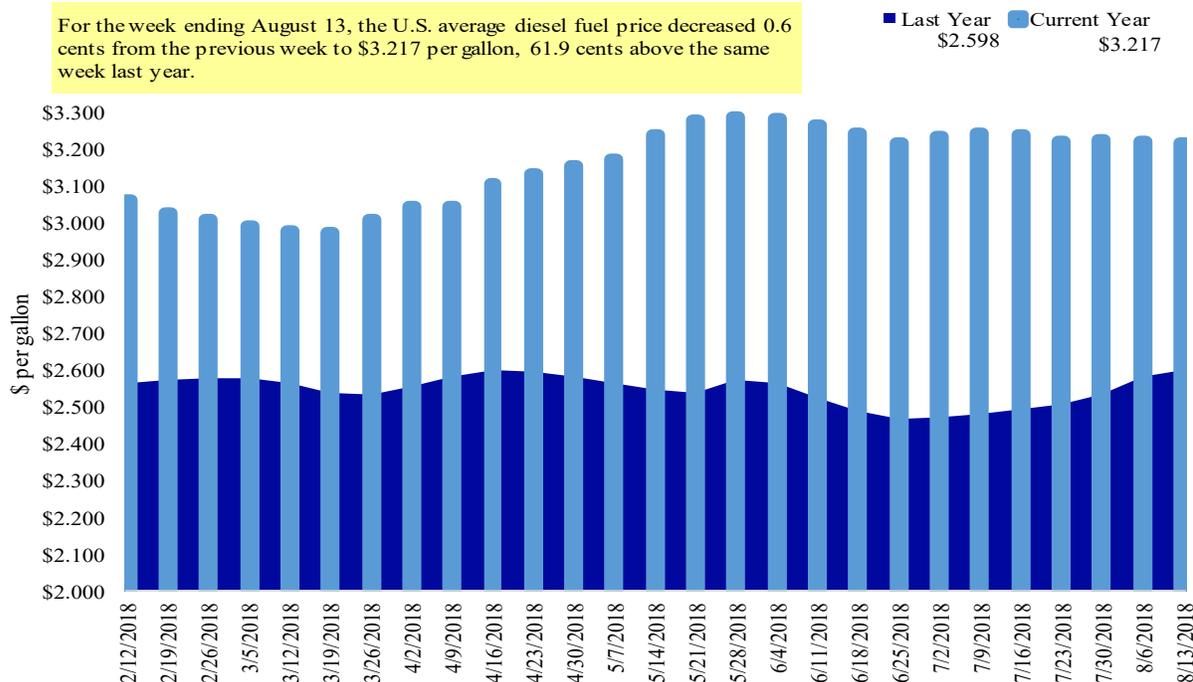
Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.219	-0.003	0.595
	New England	3.265	-0.006	0.640
	Central Atlantic	3.387	-0.006	0.626
	Lower Atlantic	3.091	-0.002	0.564
II	Midwest ²	3.139	-0.012	0.569
III	Gulf Coast ³	2.990	-0.005	0.580
IV	Rocky Mountain	3.358	-0.003	0.658
V	West Coast	3.714	-0.003	0.837
	West Coast less California	3.425	-0.007	0.637
	California	3.942	-0.001	0.993
Total	U.S.	3.217	-0.006	0.619

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									
8/2/2018	926	551	1,347	1,197	151	4,172	7,730	5,171	17,073
This week year ago	1,498	641	1,387	1,493	127	5,146	4,119	5,397	14,662
Cumulative exports-marketing year²									
2017/18 YTD	901	418	1,078	917	28	3,342	52,191	53,384	108,917
2016/17 YTD	2,250	451	1,393	1,212	76	5,382	52,292	55,270	112,944
YTD 2017/18 as % of 2016/17	40	93	77	76	36	62	100	97	96
Last 4 wks as % of same period 2016/17	65	79	101	78	123	82	226	112	133
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,486

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 8/02/2018	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2018/19	2017/18	2016/17		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				
Mexico	2,774	15,161	13,850	9	12,297
Japan	1,373	11,500	12,046	(5)	11,450
Korea	722	5,838	5,645	3	4,494
Colombia	103	4,665	4,283	9	4,179
Peru	35	3,199	3,082	4	2,693
Top 5 Importers	5,006	40,363	38,907	4	35,113
Total US corn export sales	7,814	59,921	56,411	6	49,308
% of Projected	13%	98%	97%		
Change from prior week ²	658	554	52		
Top 5 importers' share of U.S. corn export sales	64%	67%	69%		71%
USDA forecast, August 2018	59,796	61,069	58,372	5	
Corn Use for Ethanol USDA forecast, August 2018	142,875	142,240	137,973	3	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - 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/. 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 - 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 8/02/2018	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2018/19	2017/18	2016/17		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
China	1,332	27,925	36,322	(23)	31,881
Mexico	1,190	4,473	3,730	20	3,452
Indonesia	161	2,641	2,430	9	1,987
Japan	191	2,341	2,251	4	2,067
Netherlands	0	2,350	1,874	25	2,098
Top 5 importers	2,874	39,729	46,606	(15)	41,486
Total US soybean export sales	10,906	58,555	60,667	(3)	52,919
% of Projected	19%	102%	103%		
Change from prior week ²	533	422	(19)		
Top 5 importers' share of U.S. soybean export sales	26%	68%	77%		78%
USDA forecast, August 2018	56,131	57,493	59,019	97	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - 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. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 8/02/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2018/19	2017/18		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	960	912	5	2,620
Mexico	698	1,443	(52)	2,743
Philippines	1,099	1,184	(7)	2,395
Brazil	104	95	10	862
Nigeria	313	556	(44)	1,254
Korea	668	924	(28)	1,104
China	0	389	(100)	1,623
Taiwan	404	460	(12)	768
Indonesia	271	513	(47)	726
Colombia	86	281	(69)	635
Top 10 importers	4,603	6,756	(32)	14,729
Total US wheat export sales	7,514	10,528	(29)	22,804
% of Projected	27%	43%		
Change from prior week ²	317	464		
Top 10 importers' share of U.S. wheat export sales	61%	64%		65%
USDA forecast, August 2018	27,929	24,550	14	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - 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 week's 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 08/09/18	Previous Week*	Current Week as % of Previous	2018 YTD*	2017 YTD*	2018 YTD as % of 2017 YTD	Last 4-weeks as % of:		2017 Total*
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	333	207	161	7,682	9,887	78	73	91	14,805
Corn	298	404	74	14,106	9,629	146	176	165	10,928
Soybeans	66	68	98	5,793	4,961	117	117	146	13,246
Total	698	679	103	27,581	24,477	113	117	129	38,978
Mississippi Gulf									
Wheat	88	75	118	2,558	3,051	84	80	76	4,198
Corn	681	667	102	21,940	21,090	104	145	117	28,690
Soybeans	313	712	44	14,398	13,952	103	108	122	32,911
Total	1,083	1,453	75	38,896	38,093	102	123	115	65,800
Texas Gulf									
Wheat	0	35	0	2,086	4,472	47	42	35	6,354
Corn	55	0	n/a	511	517	99	70	70	733
Soybeans	0	0	n/a	67	0	n/a	n/a	n/a	292
Total	55	35	159	2,664	4,990	53	49	42	7,379
Interior									
Wheat	20	14	147	879	1,178	75	43	53	1,727
Corn	205	175	117	5,403	5,269	103	125	145	8,758
Soybeans	157	100	158	4,159	3,100	134	166	198	5,508
Total	383	288	133	10,440	9,547	109	127	150	15,993
Great Lakes									
Wheat	46	13	341	401	418	96	276	121	711
Corn	0	19	0	320	129	248	285	51	192
Soybeans	36	0	n/a	317	208	152	140	120	890
Total	82	32	251	1,039	755	138	218	98	1,793
Atlantic									
Wheat	0	0	n/a	67	40	168	56	8	46
Corn	0	0	n/a	67	5	n/a	n/a	0	32
Soybeans	38	60	63	1,374	934	147	497	466	2,001
Total	38	60	63	1,509	979	154	462	237	2,079
U.S. total from ports*									
Wheat	487	344	142	13,673	19,046	72	72	76	27,841
Corn	1,240	1,265	98	42,348	36,639	116	149	130	49,333
Soybeans	611	940	65	26,109	23,155	113	123	140	54,847
Total	2,338	2,548	92	82,130	78,841	104	120	119	132,021

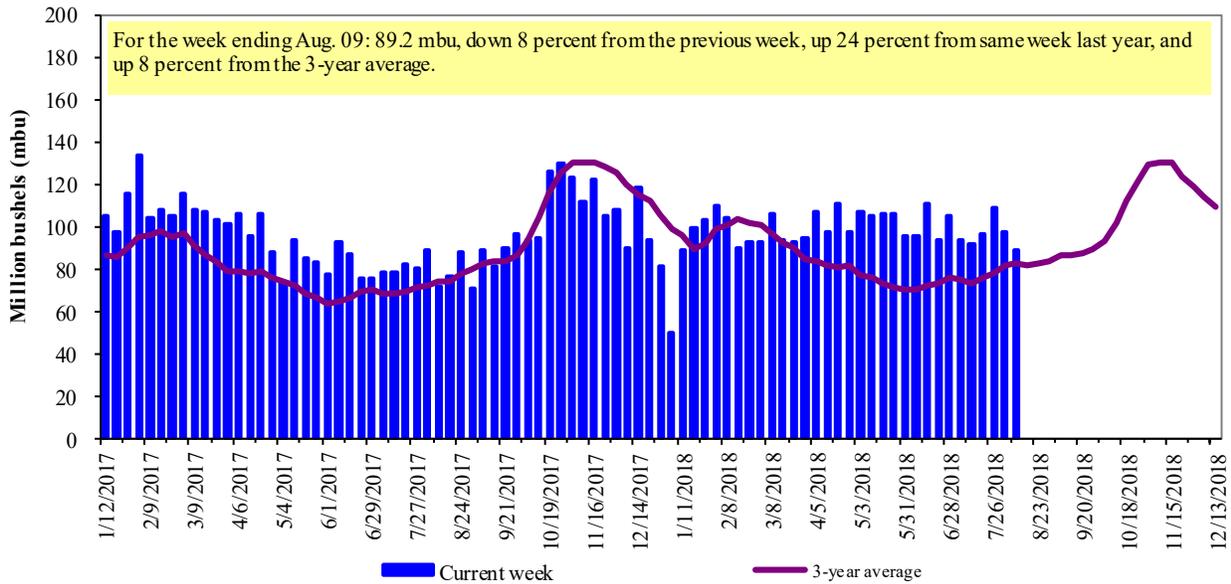
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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, 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 2017.

Figure 14

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

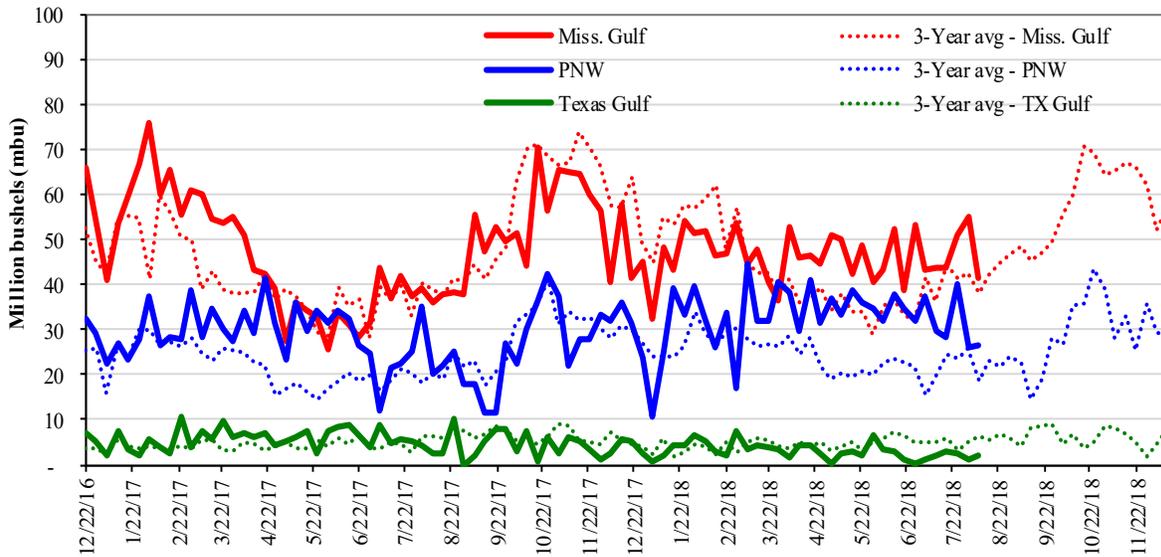


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)



<u>Week ending 08/09/18 inspections (mbu):</u>	<u>Percent change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Mississippi Gulf: 41.6	Last Week:	down 25	up 70	down 22	up 2
PNW: 26.4	Last Year (same week):	up 15	down 16	up 13	up 32
Texas Gulf: 2.2	3-yr avg. (4-wk. mov. Avg):	unchanged	down 58	down 7	up 14

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

Ocean Transportation

Table 17

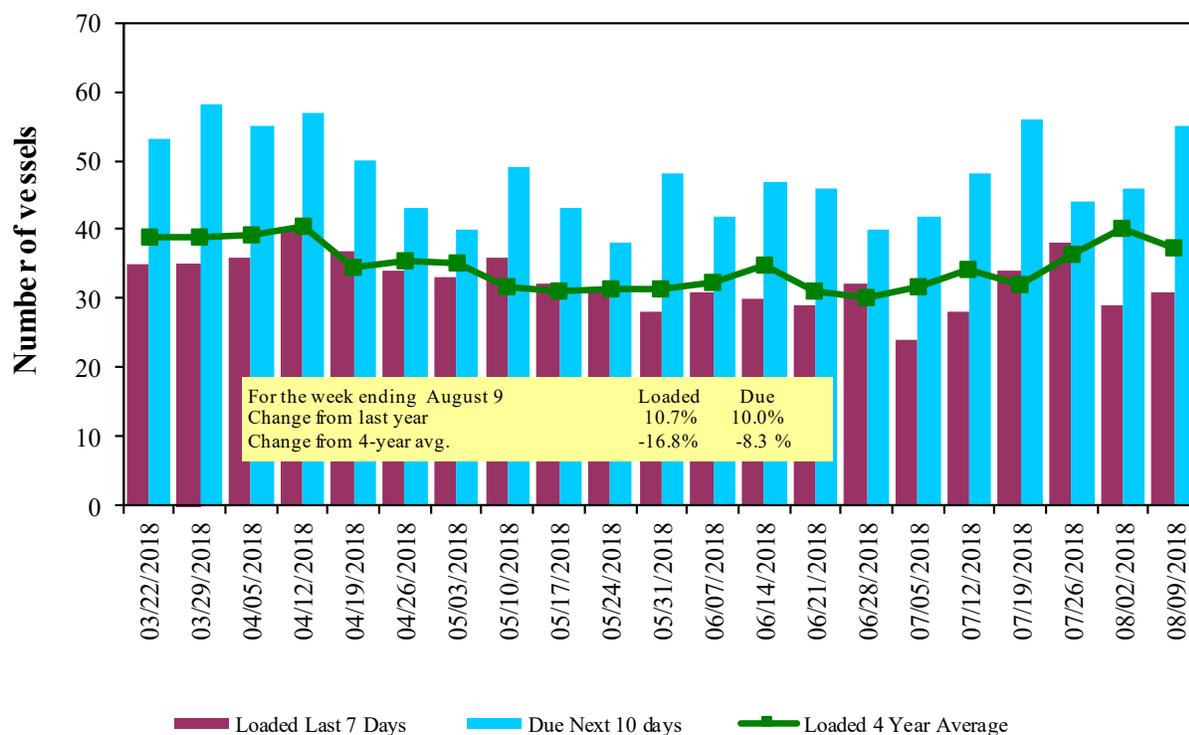
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
8/9/2018	27	31	55	16
8/2/2018	29	29	46	12
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

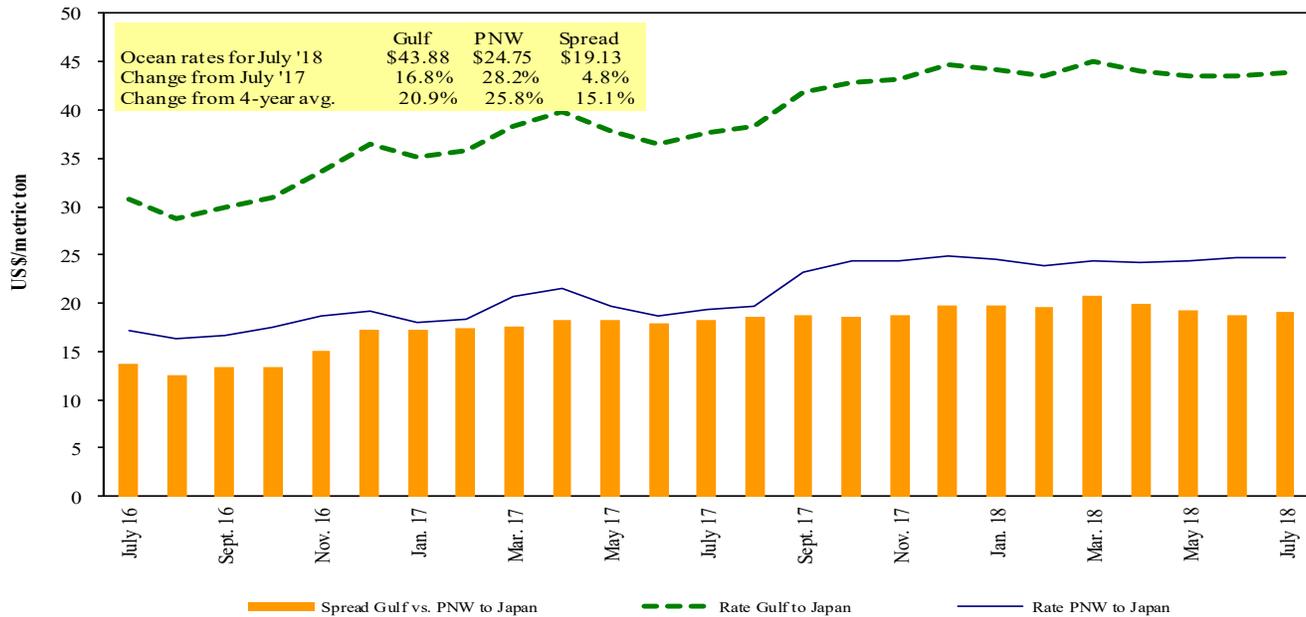
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
 U.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 08/11/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Honduras	Soybean Meal	Oct 1/10	12,500	85.00*
U.S. Gulf	Egypt	Heavy Grain	Jun 26/30	60,000	27.75
PNW	Yemen	Wheat	Aug 16	34,900	75.50*
PNW	Yemen	Wheat	Jul 26/Aug 9	27,500	83.70*
Brazil	China	Heavy Grain	Aug 21/30	60,000	36.00
Brazil	China	Heavy Grain	Aug 18/28	60,000	36.00
Brazil	China	Heavy Grain	Jul 18/28	60,000	36.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	35.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	33.75
Brazil	Malaysia	Heavy Grain	Aug 17/24	65,000	31.00

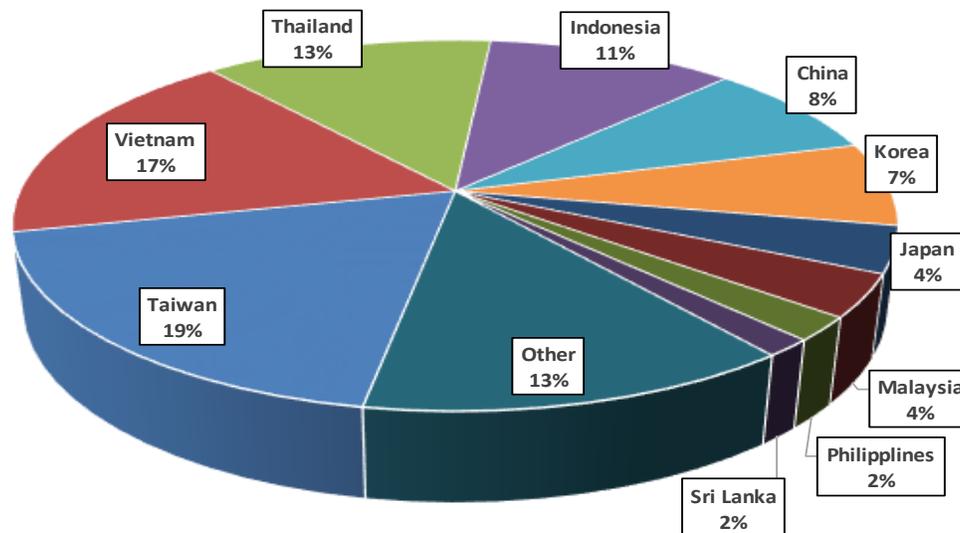
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option
 *50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2017, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2017 went to Asia, of which 10 percent were moved in containers. Approximately 93 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-May 2018

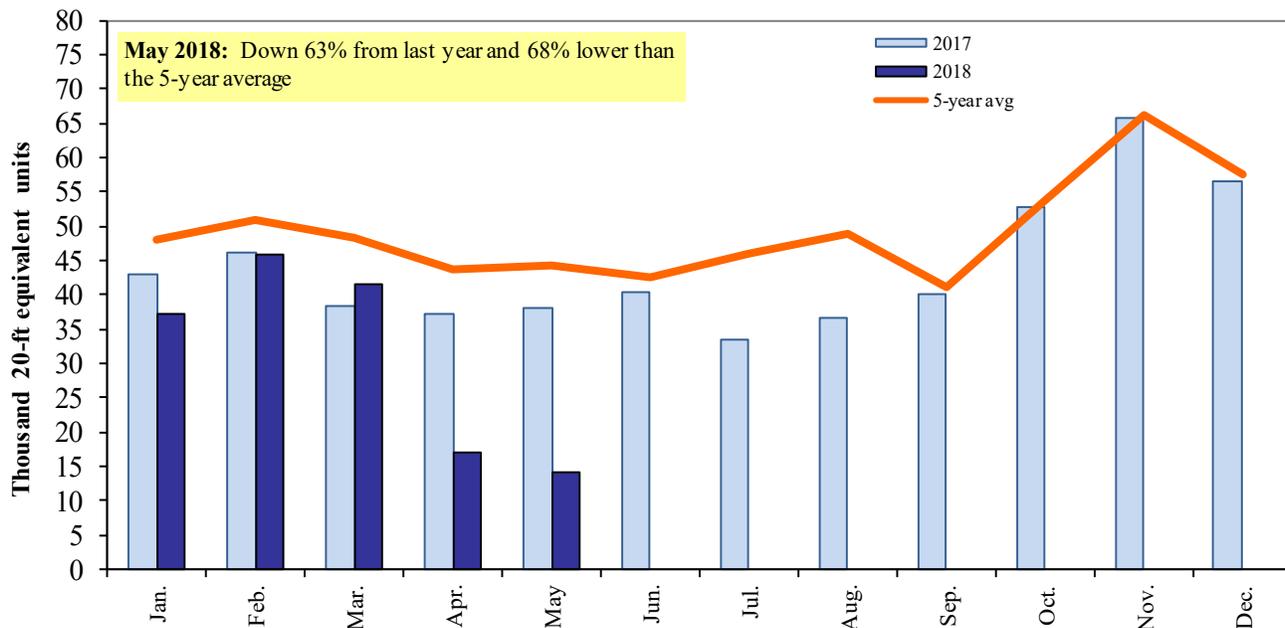


Service (PIERS) data

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.

Contacts and Links

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