



# 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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### Iowa Panel Approves Rail Projects

The Iowa Transportation Commission (Iowa DOT) recently approved more than \$3.1 million in funding for five rail infrastructure and development projects, under Iowa's Railroad Revolving Loan and Grant Program. The projects are expected to add jobs and improve the rail network, with at least two having a direct bearing on grain transportation. Examples include a project to make rail improvements on Union Pacific Railroad track at Quaker Oats, which was awarded a \$1 million grant; and a \$660,750 loan to Farmers Feed and Grain for rail improvements.

### Grain Inspections Down from Past Week

For the week ending October 18, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.55 million metric tons (mmt); down 6 percent from the previous week, down 24 percent from last year, and down 16 percent from the 3-year average. Inspections of each of the three major grains were down from the previous week, with wheat experiencing the largest decrease, at 16 percent. Grain inspections dropped 45 percent from the past week in the Pacific Northwest (PNW), as shipments destined to Asia decreased. Mississippi Gulf grain inspections decreased only 2 percent from the previous week. During the last four weeks, grain inspections were 8 percent below last year and 15 percent below the 3-year average.

### Mississippi River Locks Reopen after Flood-related Closures

Significant rainfall has resulted in flooding conditions, which closed multiple locks on the Upper Mississippi River. The impacted locks are located on a 184-mile stretch of the Mississippi River, from Muscatine, IA, to Clarksville, MO. As of the morning of October 25, rainfall has subsided, and all locks are open. The U.S. Army Corps of Engineers reports significant delays at the impacted locks. In addition to long queues at the locks, barge shipments are delayed by high water at St. Louis Harbor, where southbound traffic is restricted to daylight hours. St. Louis barge traffic is restricted to day light hours when the Mississippi River level is above 25 feet. Forecasts from the National Weather Service indicate the Mississippi River at St. Louis is not expected to fall below 25 feet, until October 29. High water has impacted river traffic throughout 2018, as cumulative year-to-date down-bound grain tonnages, on the locking portions of the Mississippi, Ohio and Arkansas rivers, were 30.5 million tons, 6 percent lower than last year at this time.

## Snapshots by Sector

### Export Sales

For the week ending October 11, **unshipped balances** of wheat, corn, and soybeans totaled 34.2 mmt, down 2 percent from the same time last year. Net weekly **wheat export sales** were .476 mmt, up 40 percent from the previous week. Net **corn export sales** were .382 mmt, down 62 percent from the previous week. Net **soybean export sales** were .294 mmt, down 33 percent from the past week.

### Rail

For the week ending October 13, U.S. Class I railroads originated 22,205 **grain carloads**; down 2 percent from the previous week, unchanged from last year, and down 10 percent from the 3-year average.

Average November shuttle **secondary railcar** bids/offers, per car, were \$81 above tariff for the week ending October 18, up \$106 from last week, and \$156 higher than last year. Average non-shuttle secondary railcar bids/offers were \$63 above tariff. There were no non-shuttle bids/offers last week or this week last year.

### Barge

For the week ending October 20, **barge grain movements** totaled 285,650 tons, 45 percent lower than the previous week and down 48 percent from the same period last year.

For the week ending October 20, 156 grain barges **moved down river**, 175 less than the previous week. There were 832 grain barges **unloaded in New Orleans**, 7 percent lower than the previous week.

### Ocean

For the week ending October 18, 38 **ocean-going grain vessels** were loaded in the Gulf, 9 percent more than the same period last year. Sixty-two vessels are expected to be loaded within the next 10 days, 35 percent more than the same period last year.

For the week ending October 18, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was \$49.75 per metric ton, 1 percent more than the previous week. The cost of shipping, from the PNW to Japan, was \$27.75 per metric ton, unchanged from the previous week.

### Fuel

For the week ending October 22, the **U.S. average diesel fuel price** decreased 1.4 cents, from the previous week, to \$3.38 per gallon, 58.3 cents above the same week last year.

# Feature Article/Calendar

## Ocean Freight Rates for Bulk Grains Increased During Third Quarter

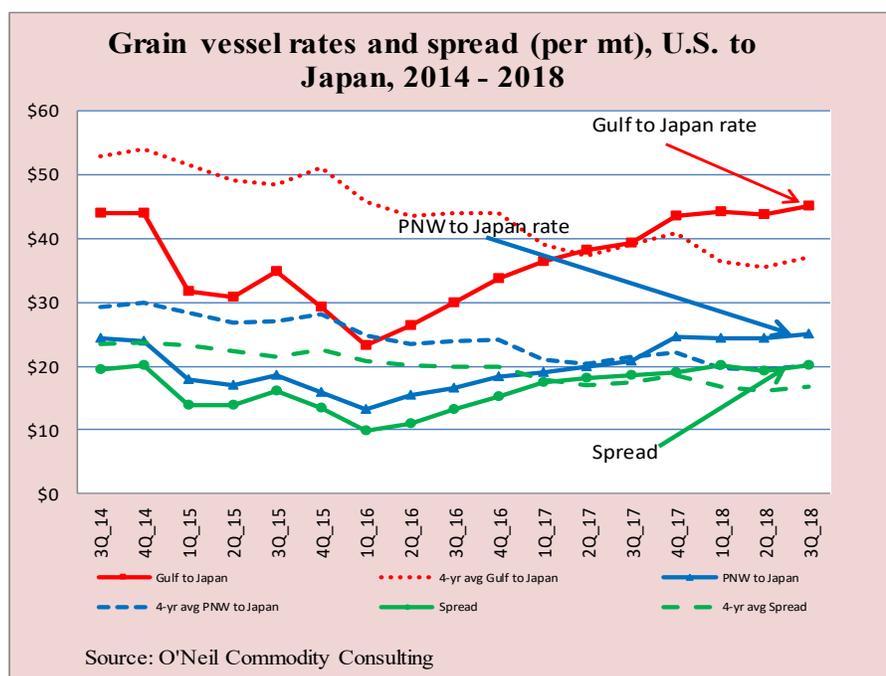
Ocean freight rates for shipping bulk grains increased during the third quarter of 2018, due to strong iron ore trade and firm coal demand. The ocean freight rates for shipping a metric ton (mt) of grain, from the U.S. Gulf to Japan, averaged \$45.13 during the quarter. The cost of shipping averaged \$24.97 per mt from the Pacific Northwest (PNW) to Japan, and \$21.06 from the U.S. Gulf to Europe. These rates were above the previous quarter, the same period last year, and the 4-year average (see table and figure below).

Route	July	Aug.	Sept.	3 <sup>rd</sup> quarter 2018	Change from		
					2 <sup>nd</sup> qtr '18	3 <sup>rd</sup> qtr '17	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	43.88	44.95	46.56	45.13	3.3	15	22
PNW to Japan	24.75	24.65	25.50	24.97	2	21	24
Spread	19.13	20.30	21.06	20.16	4	9	19
U.S. Gulf to Europe	21.06	21.75	20.38	21.06	2	40	30

Source: O'Neil Commodity Consulting

According to a July report by Drewry Maritime Research, rates started to climb in July due to strengthening iron ore trade in China and firm coal demand in Europe. Further, the report said the Chinese government was pursuing expansionary policies by boosting investment in infrastructure and driving up steel and aluminum production. In addition, the hot summer drove up the demand for coal in Europe. During the month, the Baltic Dry Index (BDI), a composite measurement of the dry bulk shipping cost, reached 1774 points—the highest level in 2018.

The changes in rates were mixed in August. While rates from the U.S. Gulf to Japan and Europe increased slightly, the rate from the PNW to Japan remained relatively unchanged. There were weather and supply disruptions in some parts of the world (August Drewry report). Supply disruptions at iron ore mines in Brazil and South Africa kept the supply tight. Also, frequent strikes in Guinea's bauxite mines slowed the employment of Panamax vessels on the Guinea-China route. Finally, weather disturbances in China inhibited port operations.



The activity in the bulk shipping market was mixed in September. However, the market for the Panamax vessels was buoyant, as the U.S. Gulf-to-Japan and PNW-to-Japan rates increased, and the U.S. Gulf-to-

Europe rate declined. While there was a lull in coal demand in Europe ahead of restocking, coal trade strengthened in the Pacific-Australia-Far East route. Strong grain trade also supported the long-haul route, between the United States and Japan, pushing up the ocean freight rates for that route. The Baltic Panamax Index reached 1,689 points at the end of September—the highest level so far in 2018. This indicated that the Panamax vessels that are usually used to haul grains were in high demand during September and consequently led to rate increases in some of the major grain routes.

### **Market Situation and Outlook**

As of October 18, 2018, the ocean rate for shipping bulk grain, from the U.S. Gulf to Japan, was \$49.75 per mt, 13 percent above the same period last year and 16 percent higher than the beginning of the year. The rate from the PNW to Japan was \$27.75 per mt, 9 and 16 percent above the same period last year and the beginning of the current year, respectively. Both rates are at their highest levels since the beginning of the year.

Based on major market indicators, Drewry forecast a positive outlook for dry bulk market in October. The Chinese government's efforts in pursuing expansionary policy, and boosting investment in infrastructure, will drive up steel and aluminum production and increase the demand for bulk vessels. According to an August report by Drewry, the Chinese government reduced reserve requirements for banking and injected a record \$73.8 billion into the financial system, through the medium-term lending facility. In addition to increasing spending on infrastructure, the Chinese government also reduced taxes to encourage private investment. These actions, collectively, may mitigate or soften the impact of the trade rift on steel consumption. Unlike in 2017, the Chinese government is not planning to place any restriction on steel production this winter.

As the winter approaches, there will be a rise in coal restocking in Asia and Europe, due to increased electricity consumption and growing heating demand. Also, the approaching planting season in South Asia may boost fertilizer imports, leading to a robust minor-bulk trade. Finally, as the International Maritime Organization's (IMO) deadline on the regulation of sulphur emission is fast approaching, some vessel owners are scheduling to retrofit their vessels with scrubbers to make them IMO compliant. This may create a short-term supply crunch as vessels are taken off operation for weeks at a time. All of these market indicators could put upward pressure on ocean freight rates for shipping bulk commodities, including grains, in the near term. However, it is very likely that China will experience El Nino in December, which may boost hydro-electric power generation, consequently dampening the demand for coal and putting downward pressure on ocean freight rates. [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov)

# Grain Transportation Indicators

Table 1

## Grain Transport Cost Indicators<sup>1</sup>

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
10/24/18	227	285	224	282	222	197
10/17/18	228	282	216	282	221	197

<sup>1</sup>Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); 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)

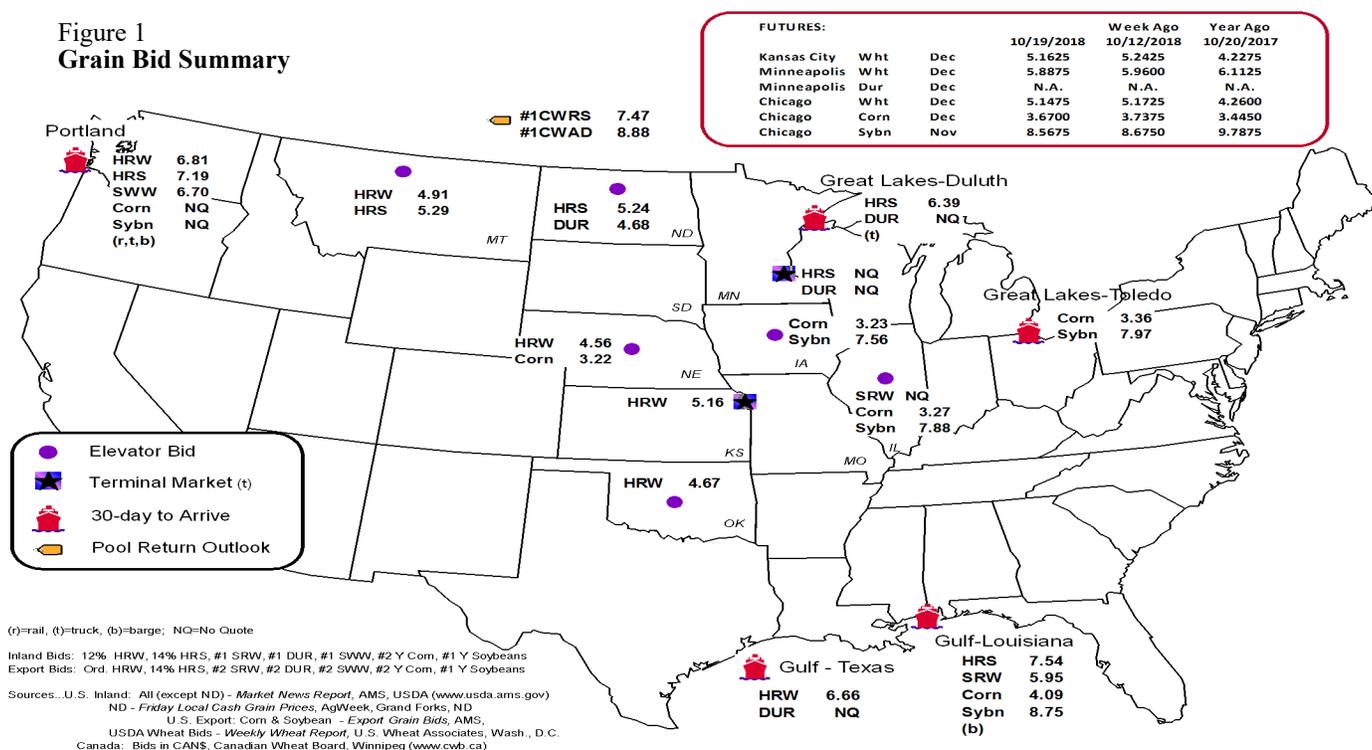
Commodity	Origin--Destination	10/19/2018	10/12/2018
Corn	IL--Gulf	-0.82	-0.87
Corn	NE--Gulf	-0.87	-0.85
Soybean	IA--Gulf	-1.19	-1.19
HRW	KS--Gulf	-1.50	-1.50
HRS	ND--Portland	-1.95	-1.82

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)<sup>1</sup>

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
10/17/2018 <sup>p</sup>	848	537	3,300	411	5,096	10/13/2018	3,159
10/10/2018 <sup>r</sup>	528	846	4,973	335	6,682	10/6/2018	2,732
2018 YTD <sup>f</sup>	18,791	40,466	259,945	16,350	335,552	2018 YTD	99,975
2017 YTD <sup>f</sup>	23,121	65,853	225,971	16,010	330,955	2017 YTD	98,238
2018 YTD as % of 2017 YTD	81	61	115	102	101	% change YTD	102
Last 4 weeks as % of 2017 <sup>2</sup>	59	69	74	67	71	Last 4wks % 2017	120
Last 4 weeks as % of 4-year avg. <sup>2</sup>	44	52	64	56	58	Last 4wks % 4 yr	134
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

<sup>1</sup> Data is incomplete as it is voluntarily provided

<sup>2</sup> Compared with same 4-weeks in 2017 and prior 4-year average.

<sup>3</sup> 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.

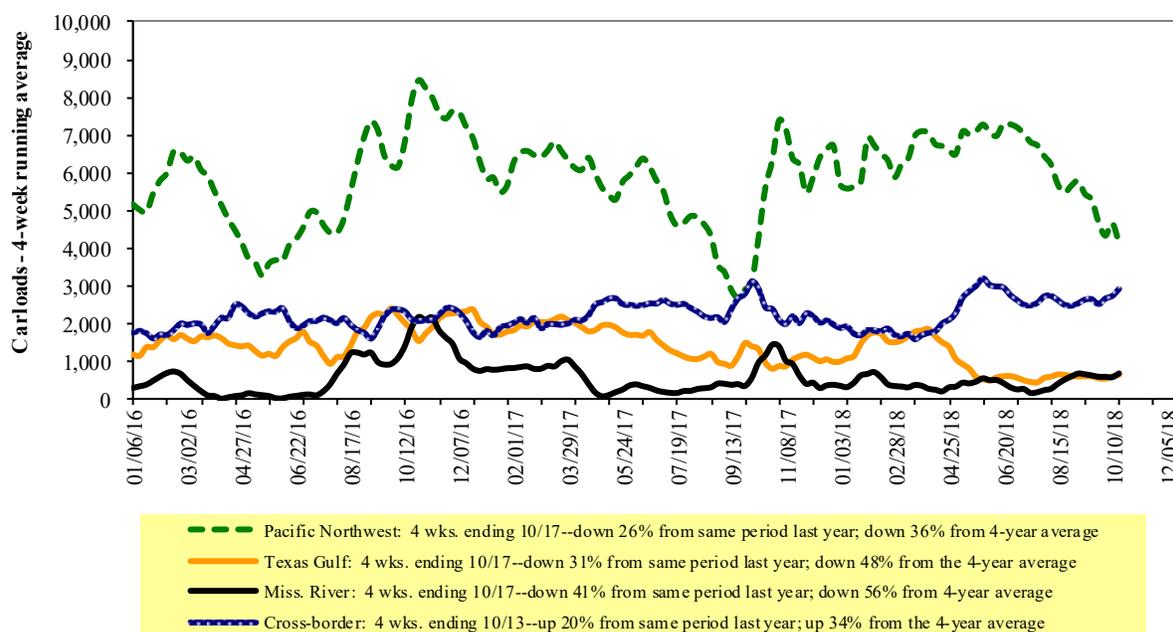
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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: 10/13/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,309	2,732	11,756	929	4,479	22,205	4,413	4,663
This week last year	2,116	2,678	11,544	1,013	4,754	22,105	4,521	5,448
2018 YTD	78,443	104,898	506,074	38,470	214,356	942,241	162,953	191,065
2017 YTD	67,788	112,090	454,051	39,314	233,136	906,379	154,116	189,382
2018 YTD as % of 2017 YTD	116	94	111	98	92	104	106	101
Last 4 weeks as % of 2017*	116	93	105	89	92	100	124	89
Last 4 weeks as % of 3-yr avg.**	97	88	97	87	85	93	108	93
Total 2017	89,465	142,738	578,964	50,223	289,574	1,150,964	198,422	244,766

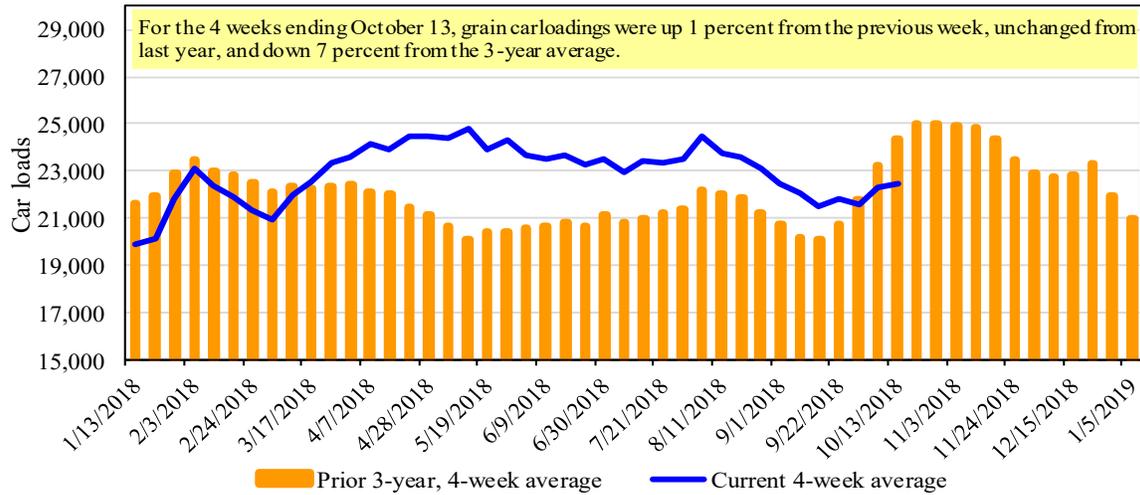
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*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 Offerings<sup>1</sup> (\$/car)<sup>2</sup>**

For the week ending: 10/18/2018		Delivery period							
		Oct-18	Oct-17	Nov-18	Nov-17	Dec-18	Dec-17	Jan-19	Jan-18
BNSF <sup>3</sup>	COT grain units	no offer	n/a	no offer	no bids	no offer	no bids	0	no bids
	COT grain single-car <sup>5</sup>	no offer	n/a	no offer	2	no offer	0	0	no bids
UP <sup>4</sup>	GCAS/Region 1	no offer	n/a	no offer	no bids	no offer	no bids	n/a	no offer
	GCAS/Region 2	no offer	n/a	no bid	no bids	no offer	no bids	n/a	no offer

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

<sup>2</sup>Average premium/discount to tariff, last auction

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

<sup>4</sup>UP - GCAS = Grain Car Allocation System

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

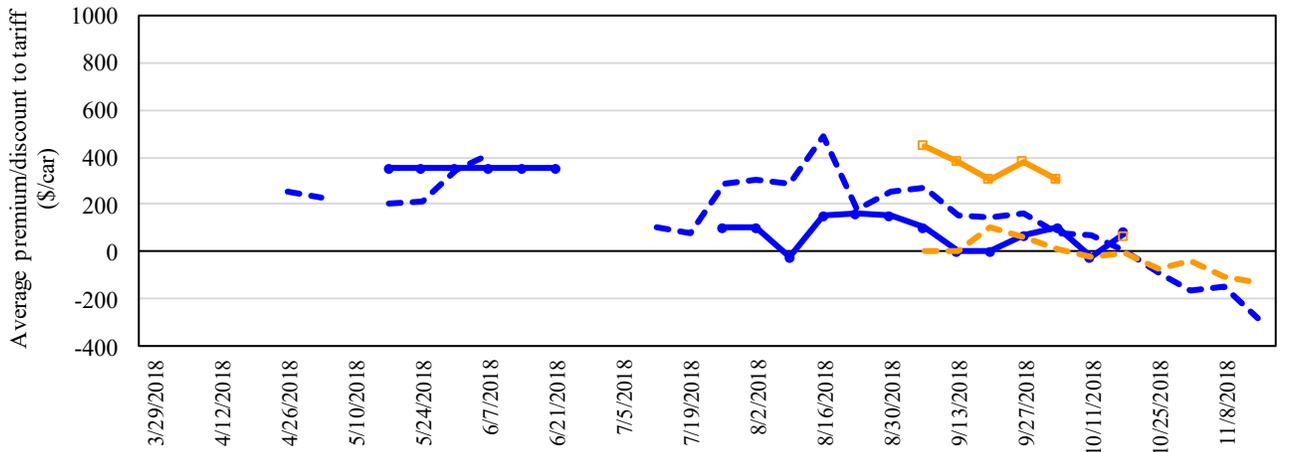
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

<sup>5</sup>Range 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 November 2018, Secondary Market**



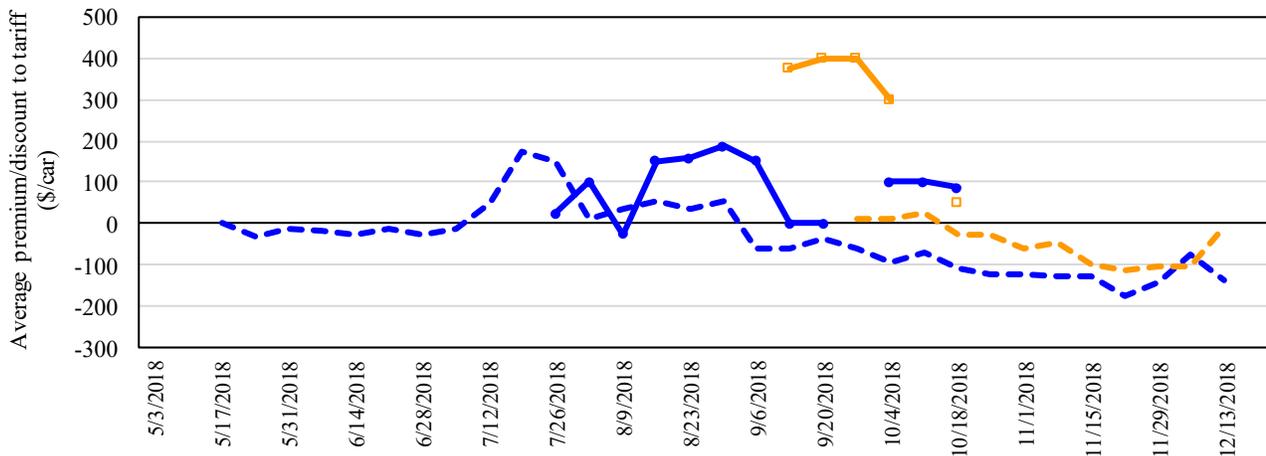
10/18/2018	BNSF	UP
<b>Non-Shuttle</b>	\$50	\$75
<b>Shuttle</b>	\$125	\$38

— Shuttle  
 - - Shuttle prior 3-yr avg. (same week)  
 — Non-Shuttle  
 - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are \$388 below the peak. Average Shuttle bids/offers rose \$106 this week and are \$269 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 December 2018, Secondary Market**



10/18/2018	BNSF	UP
<b>Non-Shuttle</b>	\$0	\$100
<b>Shuttle</b>	n/a	\$88

— Shuttle  
 - - Shuttle prior 3-yr avg. (same week)  
 — Non-Shuttle  
 - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are \$350 below the peak. Average Shuttle bids/offers fell \$13 this week and are \$100 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 January 2019, Secondary Market**

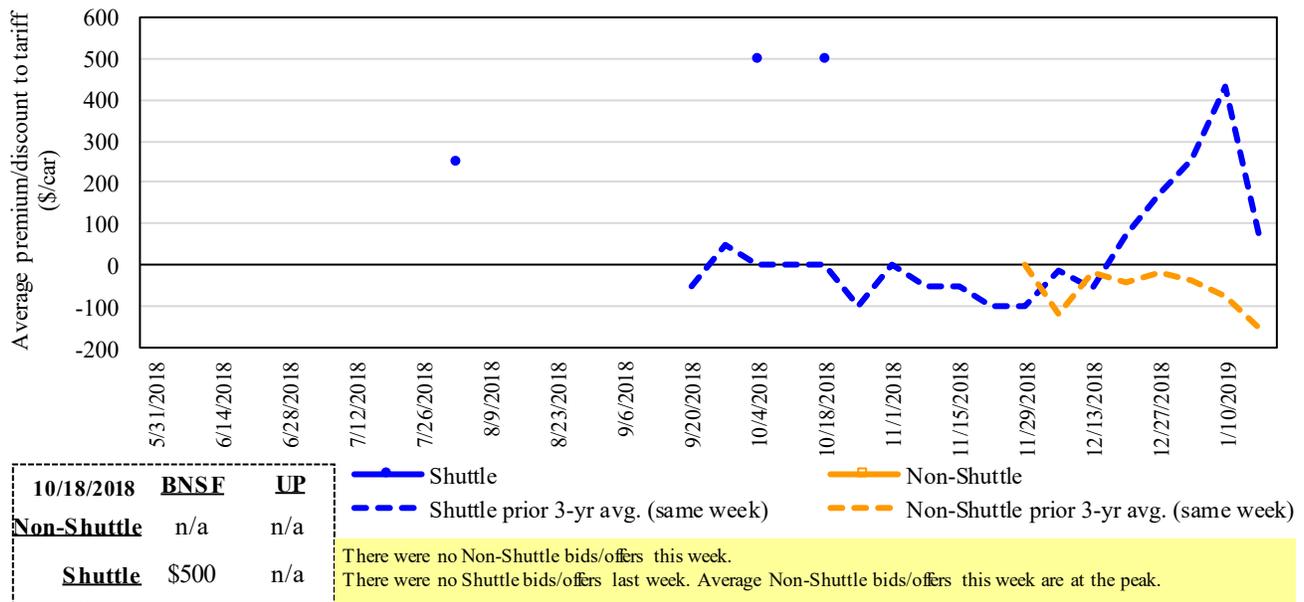


Table 6  
**Weekly Secondary Railcar Market (\$/car)<sup>1</sup>**

For the week ending:		Delivery period					
		Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19
<b>Non-shuttle</b>	<b>10/18/2018</b>						
	<b>BNSF-GF</b>	<b>50</b>	<b>0</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
	Change from last week	n/a	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
	<b>UP-Pool</b>	<b>75</b>	<b>100</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
	Change from last week	n/a	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	
<b>Shuttle</b>	<b>10/18/2018</b>						
	<b>BNSF-GF</b>	<b>125</b>	<b>n/a</b>	<b>500</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
	Change from last week	125	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	75	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	<b>38</b>	<b>88</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>
	Change from last week	88	(13)	n/a	n/a	n/a	n/a
Change from same week 2017	238	288	n/a	n/a	n/a	n/a	

<sup>1</sup>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 Shipments<sup>1</sup>**

October, 2018	Origin region <sup>3</sup>	Destination region <sup>3</sup>	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel <sup>2</sup>	Percent change Y/Y <sup>4</sup>
<b>Unit train</b>							
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
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$326	\$54.09	\$1.47	6
	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$241	\$42.12	\$1.07	5
	Toledo, OH	Raleigh, NC	\$6,581	\$0	\$65.35	\$1.66	4
	Des Moines, IA	Davenport, IA	\$2,258	\$51	\$22.93	\$0.58	1
	Indianapolis, IN	Atlanta, GA	\$5,646	\$0	\$56.07	\$1.42	4
	Indianapolis, IN	Knoxville, TN	\$4,704	\$0	\$46.71	\$1.19	4
	Des Moines, IA	Little Rock, AR	\$3,609	\$150	\$37.33	\$0.95	2
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,327	\$438	\$57.24	\$1.45	5
	Minneapolis, MN	New Orleans, LA	\$4,131	\$231	\$43.32	\$1.18	18
	Toledo, OH	Huntsville, AL	\$5,459	\$0	\$54.21	\$1.48	3
	Indianapolis, IN	Raleigh, NC	\$6,698	\$0	\$66.51	\$1.81	4
	Indianapolis, IN	Huntsville, AL	\$4,937	\$0	\$49.03	\$1.33	4
Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$241	\$49.52	\$1.35	3	
<b>Shuttle Train</b>							
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	\$5,896	\$0	\$58.55	\$1.59	4
	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	5
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	4
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,800	\$241	\$40.13	\$1.02	5
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	5
	Des Moines, IA	Amarillo, TX	\$4,060	\$189	\$42.19	\$1.07	5
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	4
	Council Bluffs, IA	Stockton, CA	\$5,000	\$0	\$49.65	\$1.26	4
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	3
	Minneapolis, MN	Portland, OR	\$5,800	\$0	\$57.60	\$1.57	3
	Fargo, ND	Tacoma, WA	\$5,650	\$0	\$56.11	\$1.53	3
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$278	\$50.18	\$1.37	3
	Toledo, OH	Huntsville, AL	\$4,634	\$0	\$46.02	\$1.25	6
	Grand Island, NE	Portland, OR	\$5,710	\$393	\$60.60	\$1.65	4

<sup>1</sup>A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

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

<sup>3</sup>Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

<sup>4</sup>Percentage 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: October, 2018			Fuel				Percent
Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	surcharge per car <sup>2</sup>	Tariff plus surcharge per:		change <sup>4</sup> Y/Y
					metric ton <sup>3</sup>	bushel <sup>3</sup>	
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	\$411	\$79.51	\$2.16	3
	TX	Salinas Victoria, NL	\$4,292	\$100	\$44.88	\$1.22	1
Corn	IA	Guadalajara, JA	\$8,528	\$379	\$91.01	\$2.31	5
	SD	Celaya, GJ	\$7,880	\$0	\$80.51	\$2.04	2
	NE	Queretaro, QA	\$8,134	\$336	\$86.55	\$2.20	4
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	2
	MO	Tlalnepantla, EM	\$7,500	\$328	\$79.98	\$2.03	4
	SD	Torreón, CU	\$7,480	\$0	\$76.43	\$1.94	2
Soybeans	MO	Bojay (Tula), HG	\$8,284	\$350	\$88.22	\$2.40	4
	NE	Guadalajara, JA	\$8,842	\$382	\$94.24	\$2.56	4
	IA	El Castillo, JA	\$9,110	\$0	\$93.08	\$2.53	2
	KS	Torreón, CU	\$7,714	\$283	\$81.71	\$2.22	5
Sorghum	NE	Celaya, GJ	\$7,527	\$350	\$80.49	\$2.04	4
	KS	Queretaro, QA	\$8,000	\$209	\$83.87	\$2.13	4
	NE	Salinas Victoria, NL	\$6,633	\$168	\$69.48	\$1.76	4
	NE	Torreón, CU	\$6,962	\$271	\$73.91	\$1.88	4

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

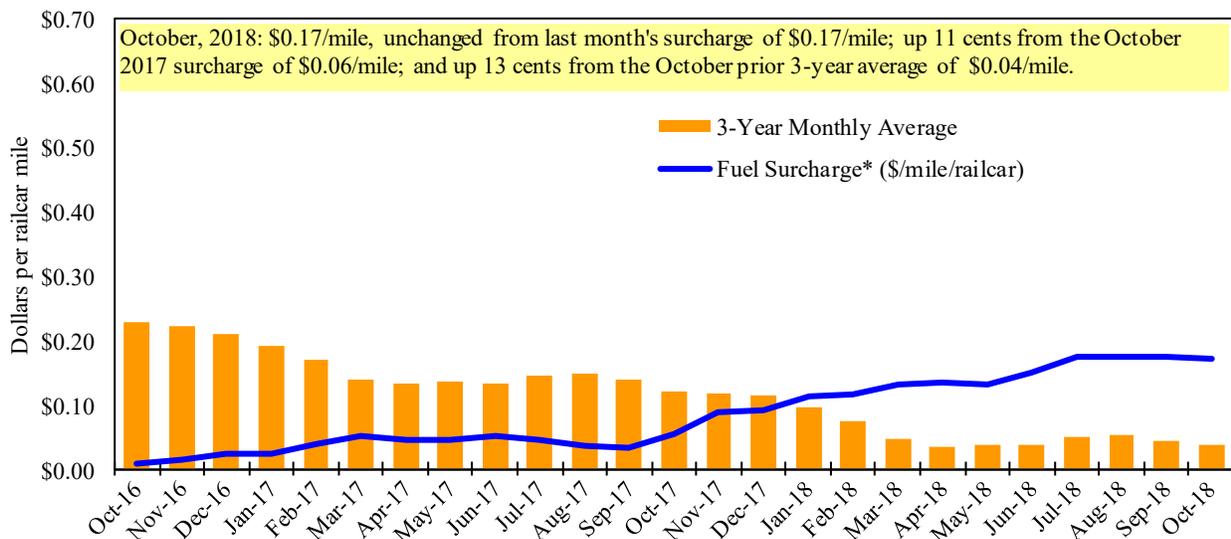
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

<sup>4</sup>Percentage 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 Average<sup>1</sup>**

<sup>1</sup> 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.

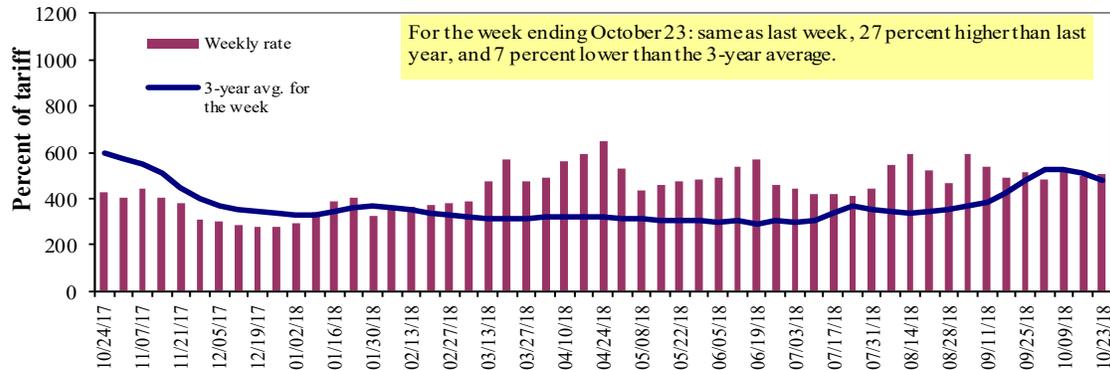
\*\* CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-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 <sup>1</sup>	10/23/2018	538	525	508	445	450	450	400
	10/16/2018	525	-	508	500	513	513	463
\$/ton	10/23/2018	33.30	27.93	23.57	17.76	21.11	18.18	12.56
	10/16/2018	32.50	-	23.57	19.95	24.06	20.73	14.54
<b>Current week % change from the same week:</b>								
	Last year	17	24	27	39	-20	-20	33
	3-year avg. <sup>2</sup>	2	5	7	8	-9	-9	-3
Rate <sup>1</sup>	November	513	475	455	375	413	413	325
	January	-	-	413	313	375	375	283

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds; "-" n/a due to closure

Source: Transportation & Marketing Programs/AMS/USDA

### Figure 9 Benchmark tariff rates

**Calculating barge rate per ton:**  
(Rate \* 1976 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.

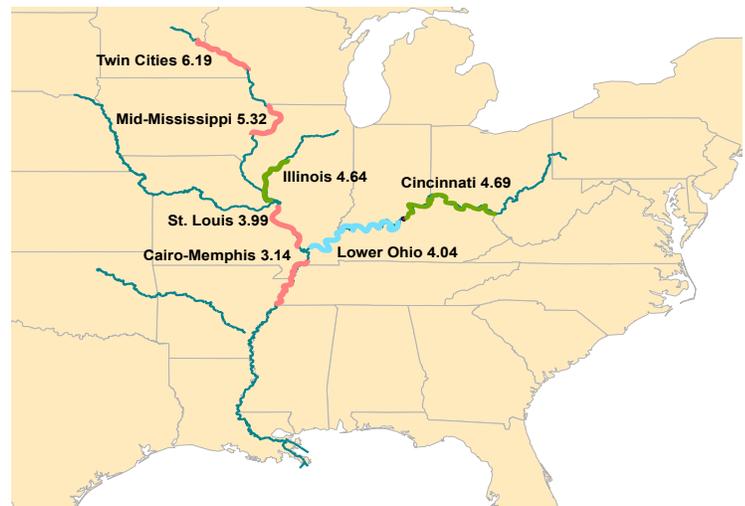
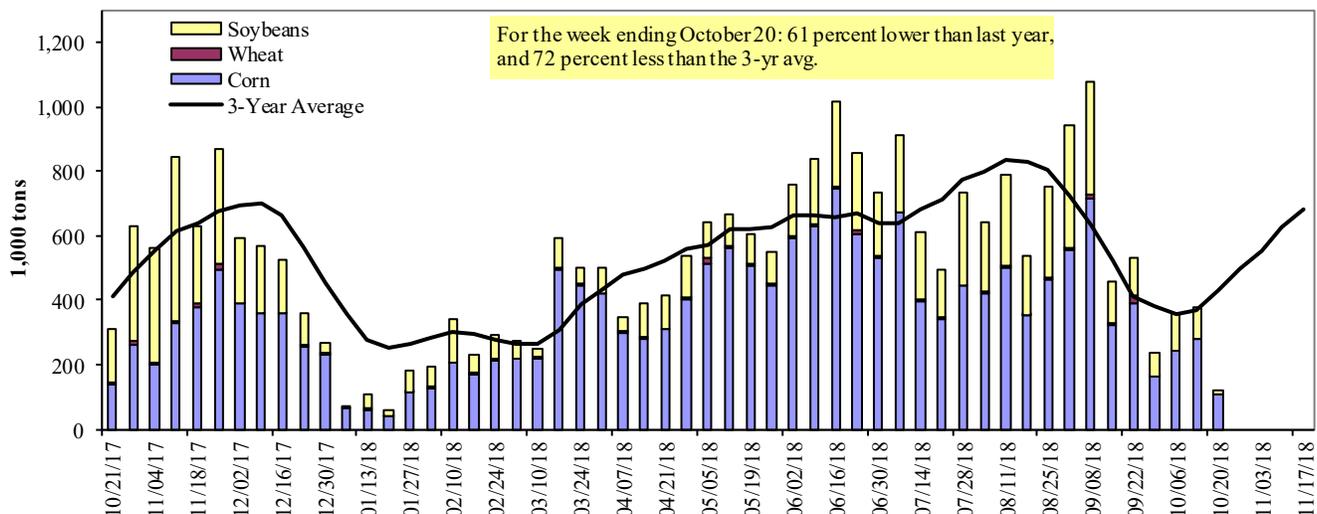


Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> 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 10/20/2018	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	28	0	19	0	48
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	134	0	11	0	145
Granite City, IL (L27)	110	0	13	0	123
<b>Illinois River (L8)</b>	62	3	3	0	68
<b>Ohio River (L52)</b>	67	0	68	0	135
<b>Arkansas River (L1)</b>	0	6	20	3	28
Weekly total - 2018	177	6	100	3	286
Weekly total - 2017	176	20	346	10	552
2018 YTD <sup>1</sup>	19,284	1,427	9,679	92	30,482
2017 YTD	18,417	2,024	11,663	261	32,366
2018 as % of 2017 YTD	105	70	83	35	94
Last 4 weeks as % of 2017 <sup>2</sup>	136	39	40	12	72
<b>Total 2017</b>	<b>22,242</b>	<b>2,210</b>	<b>16,123</b>	<b>360</b>	<b>40,936</b>

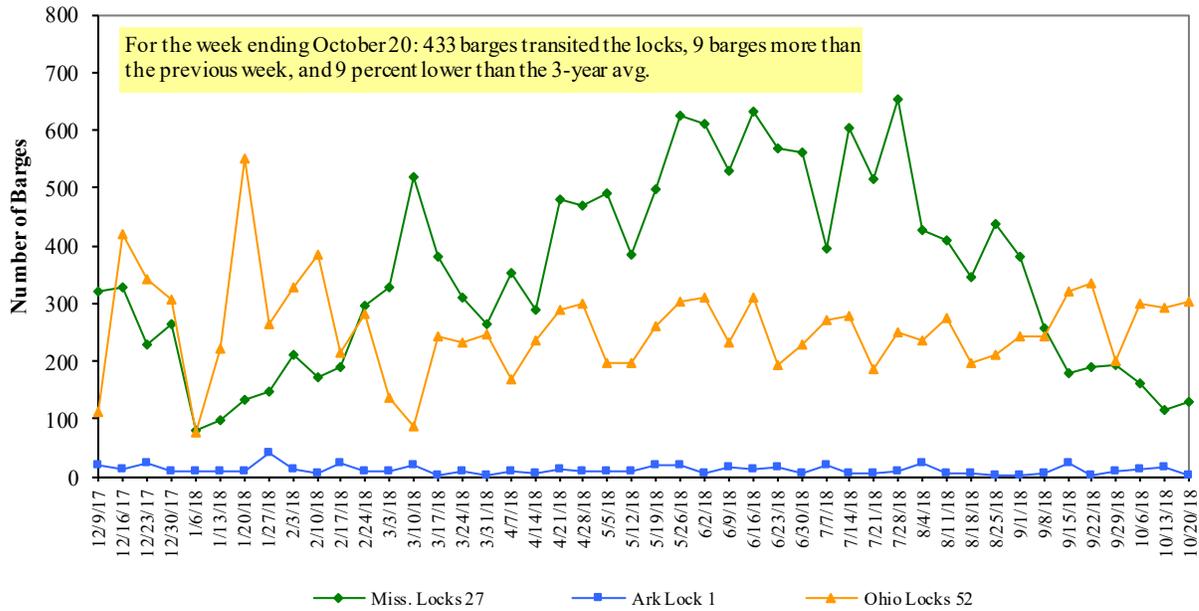
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2017.

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

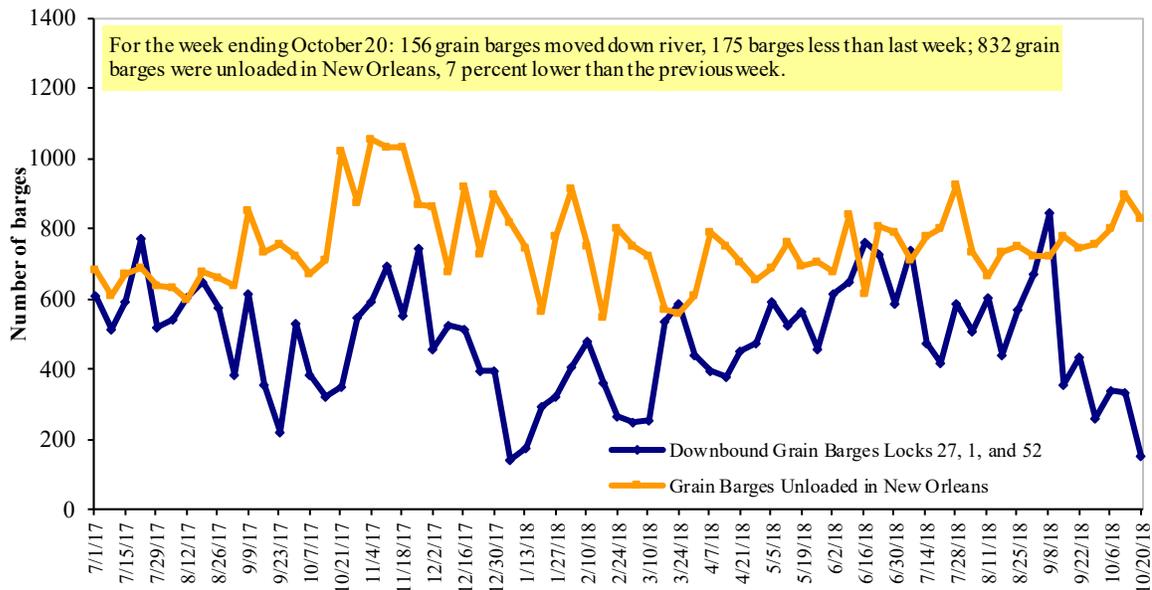
Source: U.S. Army Corps of Engineers

**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 10/22/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.369	-0.013	0.572
	New England	3.368	0.007	0.616
	Central Atlantic	3.533	-0.011	0.609
	Lower Atlantic	3.254	-0.018	0.539
II	Midwest <sup>2</sup>	3.333	-0.018	0.554
III	Gulf Coast <sup>3</sup>	3.152	-0.020	0.538
IV	Rocky Mountain	3.408	0.008	0.491
V	West Coast	3.871	-0.009	0.773
	West Coast less California	3.587	-0.004	0.572
	California	4.096	-0.013	0.930
Total	U.S.	3.380	-0.014	0.583

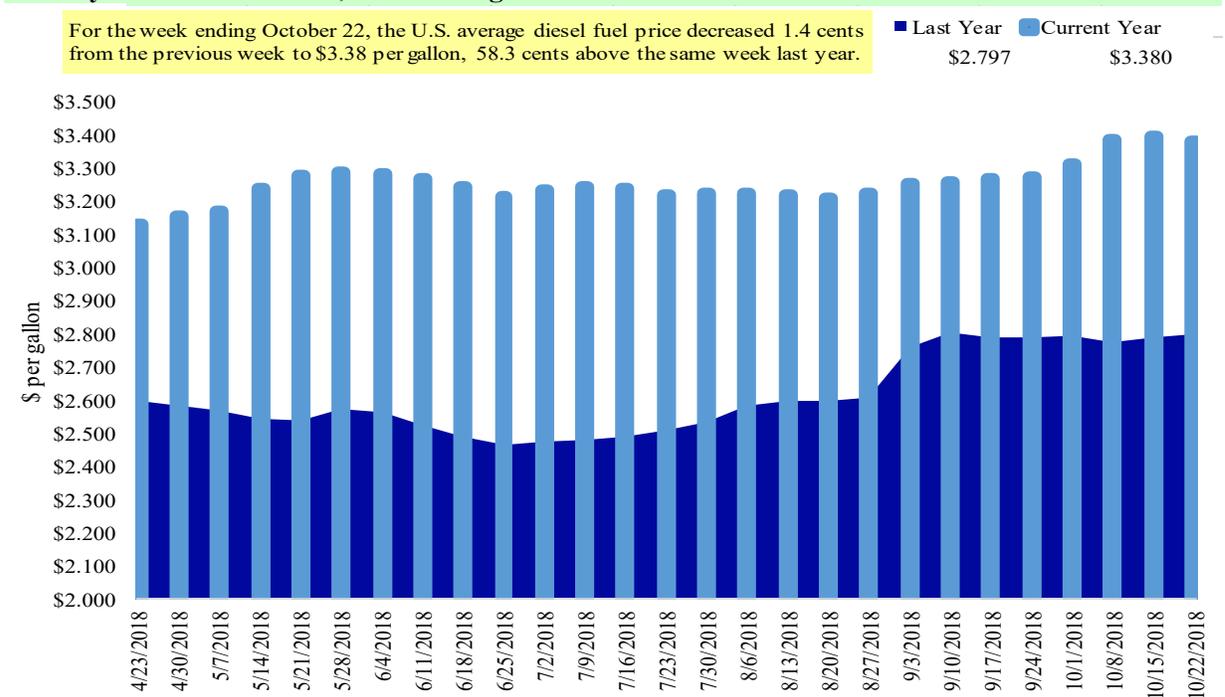
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>Same 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			
<b>Export Balances<sup>1</sup></b>									
10/11/2018	1,310	612	1,506	1,071	123	4,621	13,811	15,779	34,211
This week year ago	1,439	606	1,494	1,160	83	4,782	10,892	19,245	34,919
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2018/19 YTD	2,100	908	2,291	2,003	191	7,493	7,277	5,063	19,834
2017/18 YTD	4,066	865	2,676	2,236	176	10,019	4,037	7,041	21,098
YTD 2018/19 as % of 2017/18	52	105	86	90	108	75	180	72	94
Last 4 wks as % of same period 2017/18	97	107	95	96	140	98	134	85	102
2017/18 Total	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062

<sup>1</sup> Current unshipped (outstanding) export sales to date

<sup>2</sup> Shipped export sales to date; new marketing year now in effect for corn, soybeans, and 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](http://www.fas.usda.gov))

Table 13

## Top 5 Importers<sup>1</sup> of U.S. Corn

For the week ending 10/11/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2015-2017
	2018/19	2017/18		
	Current MY	Last MY		
	- 1,000 mt -			
Mexico	6,625	6,962	(5)	13,691
Japan	3,327	1,800	85	11,247
Korea	1,945	264	637	4,754
Colombia	770	1,074	(28)	4,678
Peru	753	803	(6)	2,975
<b>Top 5 Importers</b>	<b>13,421</b>	<b>10,903</b>	<b>23</b>	<b>37,344</b>
<b>Total US corn export sales</b>	<b>21,088</b>	<b>14,929</b>	<b>41</b>	<b>53,184</b>
% of Projected	33%	24%		
Change from prior week <sup>2</sup>	<b>382</b>	<b>1,255</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	<b>64%</b>	<b>73%</b>		<b>70%</b>
<b>USDA forecast, October 2018</b>	<b>62,977</b>	<b>62,036</b>	<b>2</b>	
<b>Corn Use for Ethanol USDA forecast, October 2018</b>	<b>143,510</b>	<b>142,266</b>	<b>1</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports for 2017/18 - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup> Cumulative 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.

<sup>3</sup> FAS Marketing Year Ranking Reports - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

**Top 5 Importers<sup>1</sup> of U.S. Soybeans**

For the week ending 10/11/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2015-2017
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	1,087	12,862	(92)	31,228
Mexico	3,165	1,382	129	3,716
Indonesia	685	605	13	2,250
Japan	682	666	2	2,145
Netherlands	302	157	0	2,209
<b>Top 5 importers</b>	<b>5,920</b>	<b>15,671</b>	<b>(62)</b>	<b>41,549</b>
<b>Total US soybean export sales</b>	<b>20,842</b>	<b>26,287</b>	<b>(21)</b>	<b>55,113</b>
% of Projected	37%	45%		
Change from prior week <sup>2</sup>	294	1,275		
<b>Top 5 importers' share of U.S. soybean export sales</b>	28%	60%		<b>75%</b>
<b>USDA forecast, October 2018</b>	<b>56,131</b>	<b>58,011</b>	<b>97</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
http://www.fas.usda.gov/esquery/. The total commitments change (net sales) from prior week could include revisions from previous week's  
outstanding sales and/or accumulated sales<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm. (Carry over plus Accumulated Exports)

Table 15

**Top 10 Importers<sup>1</sup> of All U.S. Wheat**

For the week ending 10/11/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2015-2017
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	1,395	1,899	(27)	2,781
Japan	1,441	1,500	(4)	2,649
Philippines	1,804	1,805	(0)	2,441
Korea	852	1,038	(18)	1,257
Nigeria	569	743	(23)	1,254
Indonesia	410	690	(41)	1,076
Taiwan	585	655	(11)	1,066
China	0	721	(100)	944
Colombia	344	200	72	714
Thailand	537	440	22	618
<b>Top 10 importers</b>	<b>7,937</b>	<b>9,691</b>	<b>(18)</b>	<b>14,800</b>
<b>Total US wheat export sales</b>	<b>12,115</b>	<b>14,801</b>	<b>(18)</b>	<b>22,869</b>
% of Projected	43%	60%		
Change from prior week <sup>2</sup>	476	616		
<b>Top 10 importers' share of U.S. wheat export sales</b>	66%	65%		<b>65%</b>
<b>USDA forecast, October 2018</b>	<b>27,929</b>	<b>24,550</b>	<b>14</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup>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 the previous week's  
outstanding and/or accumulated sales<sup>3</sup>FAS 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 10/18/18	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.	
<b>Pacific Northwest</b>									
Wheat	203	317	64	10,507	12,590	83	113	119	14,805
Corn	129	132	98	16,971	10,237	166	583	337	10,928
Soybeans	68	281	24	6,761	7,657	88	18	17	13,246
<b>Total</b>	<b>401</b>	<b>730</b>	<b>55</b>	<b>34,240</b>	<b>30,484</b>	<b>112</b>	<b>82</b>	<b>76</b>	<b>38,978</b>
<b>Mississippi Gulf</b>									
Wheat	37	144	26	3,227	3,701	87	153	143	4,198
Corn	662	679	98	28,602	25,166	114	200	156	28,690
Soybeans	861	766	112	20,374	22,138	92	61	60	32,911
<b>Total</b>	<b>1,560</b>	<b>1,588</b>	<b>98</b>	<b>52,203</b>	<b>51,006</b>	<b>102</b>	<b>98</b>	<b>90</b>	<b>65,800</b>
<b>Texas Gulf</b>									
Wheat	154	14	n/a	2,512	5,569	45	49	44	6,354
Corn	7	29	26	665	683	97	47	43	733
Soybeans	0	0	n/a	69	14	499	0	0	292
<b>Total</b>	<b>162</b>	<b>43</b>	<b>379</b>	<b>3,245</b>	<b>6,266</b>	<b>52</b>	<b>47</b>	<b>37</b>	<b>7,379</b>
<b>Interior</b>									
Wheat	10	9	118	1,312	1,484	88	171	87	1,727
Corn	115	135	85	7,048	7,167	98	97	110	8,758
Soybeans	119	123	97	5,334	4,177	128	84	95	5,508
<b>Total</b>	<b>244</b>	<b>266</b>	<b>92</b>	<b>13,694</b>	<b>12,828</b>	<b>107</b>	<b>95</b>	<b>101</b>	<b>15,993</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	662	550	120	149	57	711
Corn	19	19	99	383	173	221	n/a	440	192
Soybeans	120	67	180	815	529	154	139	161	890
<b>Total</b>	<b>139</b>	<b>86</b>	<b>162</b>	<b>1,860</b>	<b>1,252</b>	<b>149</b>	<b>159</b>	<b>136</b>	<b>1,793</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	69	44	155	n/a	4	46
Corn	0	0	n/a	110	23	473	72	9	32
Soybeans	41	2	n/a	1,535	1,087	141	117	139	2,001
<b>Total</b>	<b>41</b>	<b>2</b>	<b>n/a</b>	<b>1,714</b>	<b>1,154</b>	<b>148</b>	<b>113</b>	<b>66</b>	<b>2,079</b>
<b>U.S. total from ports*</b>									
Wheat	405	483	84	18,289	23,939	76	104	97	27,841
Corn	932	994	94	53,779	43,451	124	197	160	49,333
Soybeans	1,209	1,238	98	34,887	35,601	98	54	52	54,847
<b>Total</b>	<b>2,546</b>	<b>2,714</b>	<b>94</b>	<b>106,955</b>	<b>102,991</b>	<b>104</b>	<b>92</b>	<b>85</b>	<b>132,021</b>

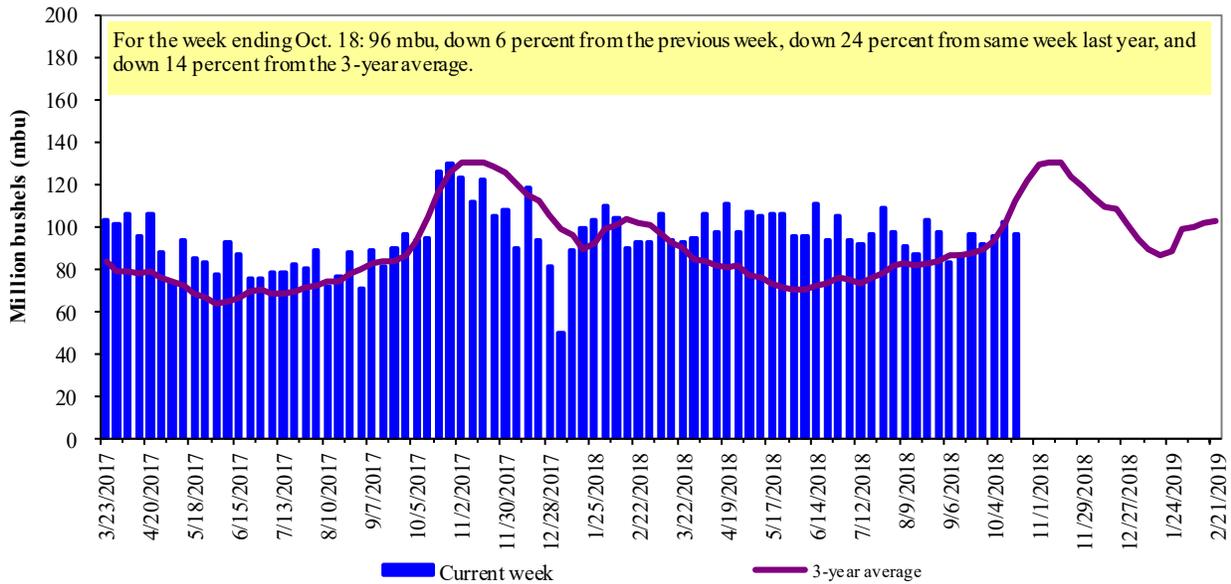
\*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

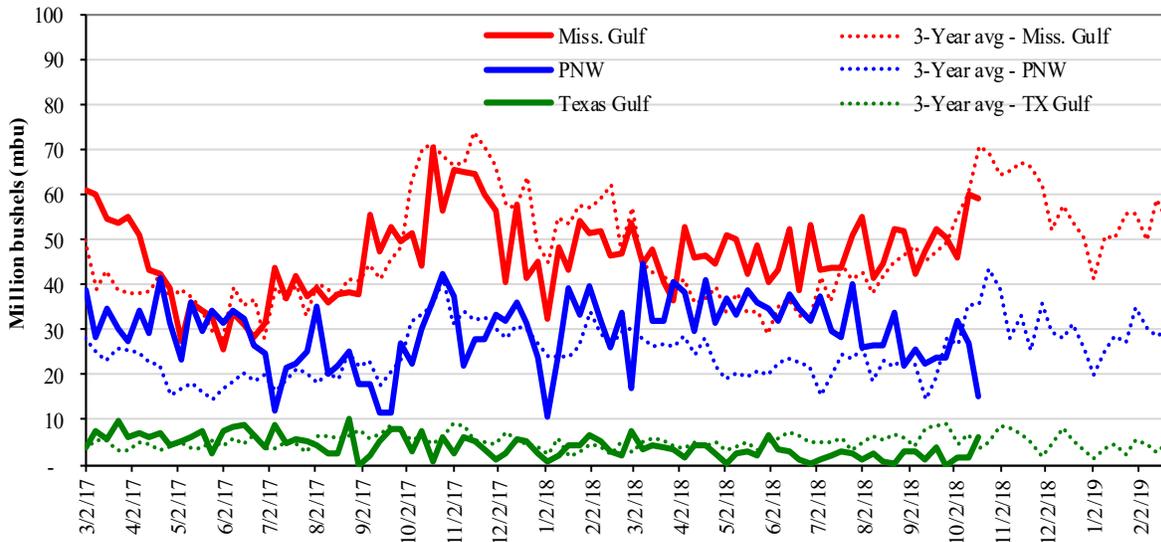


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



Week ending 10/18/18 inspections (mbu):		Percent change from:			
Mississippi Gulf:	59.1	Last Week:	down 2	up 263	up 5
PNW:	15.1	Last Year (same week):	down 16	up 849	down 9
Texas Gulf:	6.0	3-yr avg. (4-wk. mov. Avg):	unchanged	down 2	unchanged
				down 52	

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

# Ocean Transportation

Table 17

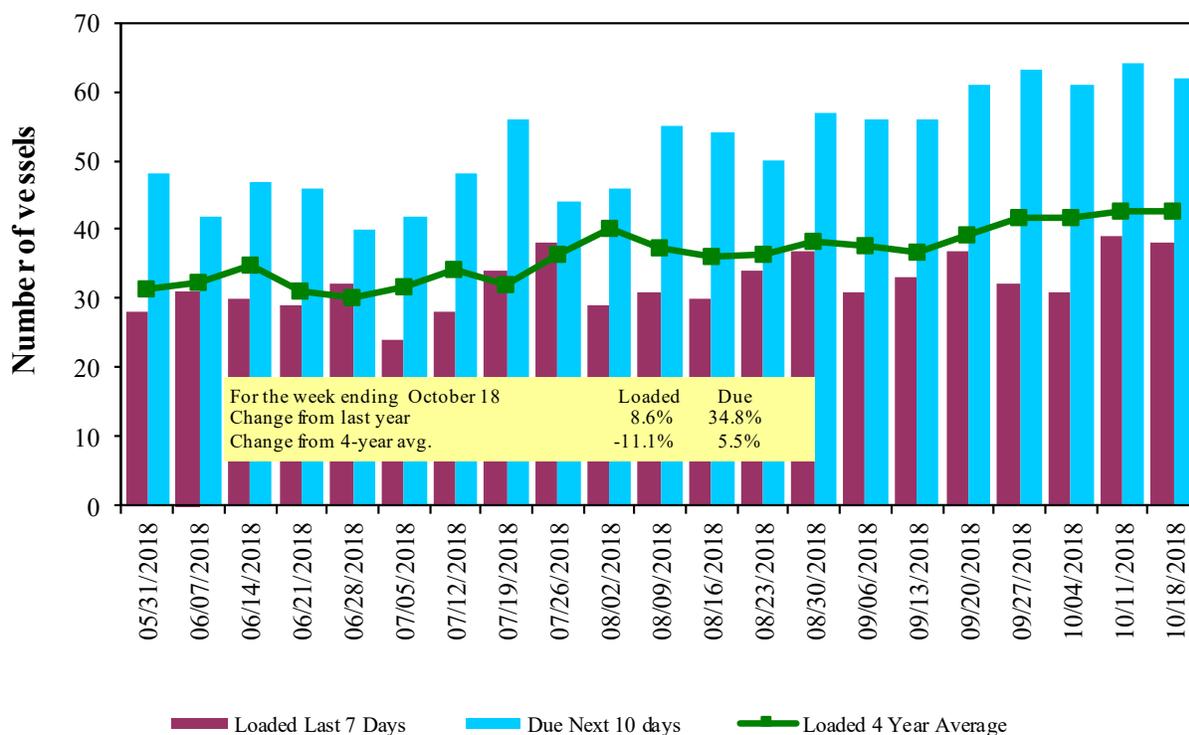
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
10/18/2018	44	38	62	9
10/11/2018	36	39	64	4
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

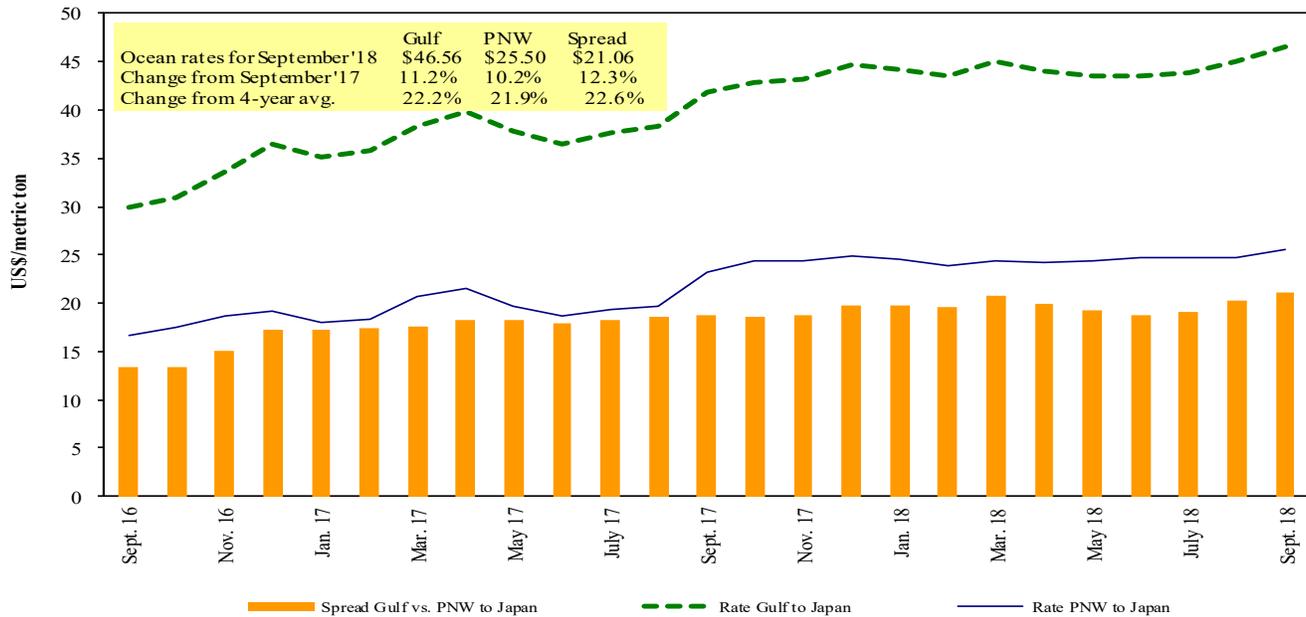
**U.S. Gulf Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA  
 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 10/20/2018**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Djibouti	Wheat	Nov 2/12	21,470	85.44*
U.S. Gulf	Djibouti	Wheat	Oct 1/15	25,340	77.65*
U.S. Gulf	Honduras	Soybean Meal	Oct 1/10	12,500	85.00*
PNW	Taiwan	Heavy Grain	Sep 15/Oct 31	63,000	25.00
Brazil	China	Heavy Grain	Nov 1/10	60,000	34.00
Brazil	China	Heavy Grain	Oct 5/15	60,000	33.75
Brazil	China	Heavy Grain	Sep 25/30	60,000	34.50
Brazil	China	Heavy Grain	Sep 10/20	60,000	35.75
Brazil	China	Heavy Grain	Aug 21/30	60,000	36.00
Brazil	China	Heavy Grain	Aug 18/28	60,000	36.00
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

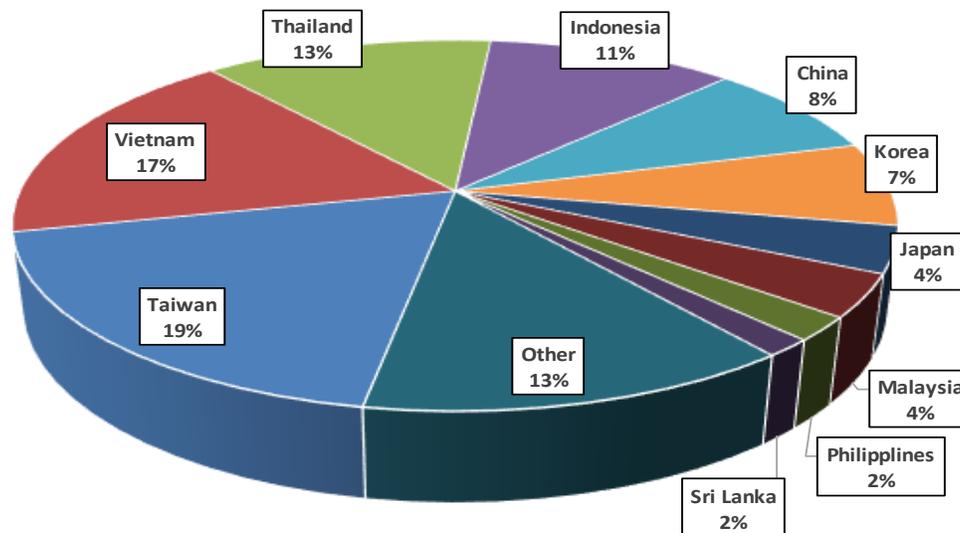
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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**

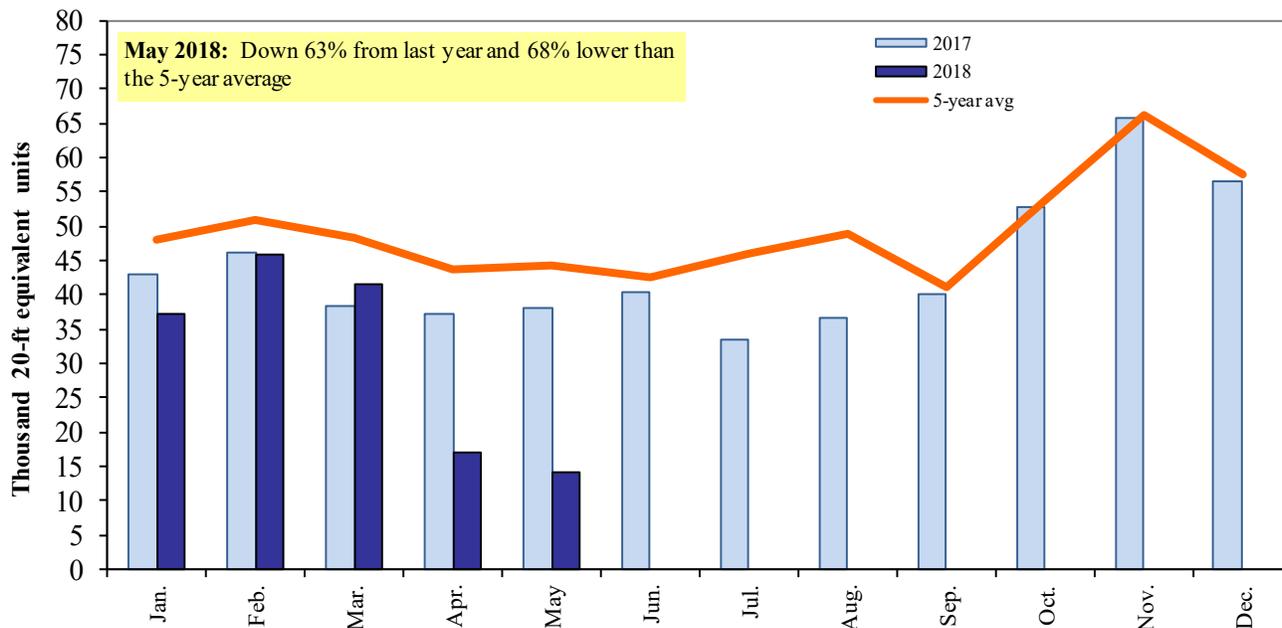


Service (PIERS) data

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

## Coordinators

Surajudeen (Deen) Olowolayemo	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
Pierre Bahizi	<a href="mailto:pierre.bahizi@ams.usda.gov">pierre.bahizi@ams.usda.gov</a>	(202) 690 - 0992
Adam Sparger	<a href="mailto:adam.sparger@ams.usda.gov">adam.sparger@ams.usda.gov</a>	(202) 205 - 8701

## Weekly Highlight Editors

Surajudeen (Deen) Olowolayemo	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
April Taylor	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 720 - 7880
Nicholas Marathon	<a href="mailto:nick.marathon@ams.usda.gov">nick.marathon@ams.usda.gov</a>	(202) 690 - 4430

## Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
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## Rail Transportation

Adam Sparger	<a href="mailto:adam.sparger@ams.usda.gov">adam.sparger@ams.usda.gov</a>	(202) 205 - 8701
Johnny Hill	<a href="mailto:johnny.hill@ams.usda.gov">johnny.hill@ams.usda.gov</a>	(202) 690 - 3295
Jesse Gastelle	<a href="mailto:jesse.gastelle@ams.usda.gov">jesse.gastelle@ams.usda.gov</a>	(202) 690 - 1144
Peter Caffarelli	<a href="mailto:petera.caffarelli@ams.usda.gov">petera.caffarelli@ams.usda.gov</a>	(202) 690 - 3244

## Barge Transportation

Nicholas Marathon	<a href="mailto:nick.marathon@ams.usda.gov">nick.marathon@ams.usda.gov</a>	(202) 690 - 4430
April Taylor	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 720 - 7880
Matt Chang	<a href="mailto:matt.chang@ams.usda.gov">matt.chang@ams.usda.gov</a>	(202) 720 - 0299

## Truck Transportation

April Taylor	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 720 - 7880
--------------	--	------------------

## Grain Exports

Johnny Hill	<a href="mailto:johnny.hill@ams.usda.gov">johnny.hill@ams.usda.gov</a>	(202) 690 - 3295
-------------	--	------------------

## Ocean Transportation

Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
April Taylor (Container movements)	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 720 - 7880

**Subscription Information:** Send relevant information to [GTRContactUs@ams.usda.gov](mailto:GTRContactUs@ams.usda.gov) for an electronic copy (*printed copies are also available upon request*).

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