



# Grain Transportation Report

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

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November 1, 2018

## WEEKLY HIGHLIGHTS

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#### USDA Releases Early Report for Agricultural Projections to 2028

On November 2, USDA will release selected tables from its upcoming *USDA Agricultural Projections to 2028* report that will be published in February 2019. USDA will post online tables containing long-term supply, use, and price projections to 2028 for major crops and livestock products. The early-release tables will be posted to [www.usda.gov/oce](http://www.usda.gov/oce). USDA's long-term agricultural projections are developed through a consensus of departmental agencies and provide a long-term representative scenario of the agricultural sector, over the next decade. The projections can be useful to agricultural shippers in anticipating future transportation demand patterns for agricultural products.

#### President Trump Signed the Water Resources Development Act 2018 into Law

On October 23, President Trump signed the America's Water Infrastructure Act (AWIA) of 2018, which authorizes the federal government to fund water infrastructure projects. The new law authorizes, or reauthorizes, water infrastructure projects and programs to provide for investment in harbor, waterway, flood protection, and other water infrastructure improvements throughout the country. Title 1 of the Act includes the Water Resources Development Act (WRDA) of 2018, which establishes the authorization process for Congress to appropriate the funds toward projects identified by legislation. The AWIA re-establishes a two-year cycle for WRDA legislation to allow timely updates and continuity for important projects. It also allows the federal government to deauthorize \$4 billion of funding in water resource development authorized by Congress, but no longer viable for construction.

#### Agribusinesses Embrace Digital Technology to Increase Supply Chain Efficiencies

On October 25, Archer Daniels Midland Company (ADM), Bunge Limited (Bunge), Cargill, Incorporated (Cargill), and Louis Dreyfus Company (LDC) [announced](#) they are investigating ways to standardize and digitize global agricultural shipping transactions. The joint release stated, "Global agribusinesses are turning to emerging digital technologies – including blockchain and artificial intelligence options – to reduce resource- and time-intensive processes associated with the global agricultural commodity value chain. The companies also seek broad-based industry participation to promote global access and adoption. Initially, ADM, Bunge, Cargill and LDC are focused on technologies to automate grain and oilseed post-trade execution processes, as they represent a highly manual and costly part of the supply chain. Eliminating inefficiencies would lead to shorter document-processing times, reduced wait times and better end-to-end contracting visibility."

### Snapshots by Sector

#### Export Sales

For the week ending October 18, **unshipped balances** of wheat, corn, and soybeans totaled 32.5 mmt, down 8 percent from the same time last year. Net weekly **wheat export sales** were .443 mmt, down 7 percent from the previous week. Net **corn export sales** were .350 mmt, down 9 percent from the previous week. Net **soybean export sales** were .213 mmt, down 28 percent from the past week.

#### Rail

U.S. Class I railroads originated 22,431 **grain carloads** for the week ending October 20; up 1 percent from the previous week, down 7 percent from last year, and down 11 percent from the 3-year average.

Average November shuttle **secondary railcar** bids/offers, per car, were \$25 above tariff for the week ending October 25, down \$56 from last week, and \$141 higher than last year. Average non-shuttle secondary railcar bids/offers were \$13 above tariff, down \$50 from last week. There were no non-shuttle bids/offers this week last year.

#### Barge

For the week ending October 27, **barge grain movements** totaled 399,684 tons, 40 percent higher than the previous week and down 54 percent from the same period last year.

For the week ending October 27, 242 grain barges **moved down river**, 86 more than the previous week. There were 683 grain barges **unloaded in New Orleans**, 18 percent lower than the previous week.

#### Ocean

For the week ending October 25, 33 **ocean-going grain vessels** were loaded in the Gulf, 8 percent less than the same period last year. Fifty-two vessels are expected to be loaded within the next 10 days, 4 percent more than the same period last year.

For the week ending October 25, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was \$49.25 per metric ton, 1 percent less than the previous week. The cost of shipping, from the PNW to Japan, was \$27.50 per metric ton, 1 percent less than the previous week.

#### Fuel

For the week ending October 29, the **U.S. average diesel fuel price** decreased 2.5 cents, from the previous week, to \$3.355 per gallon, 53.6 cents above the same week last year.

## Shift in Transportation Demand for Soybean and Corn Exports

The 2018/19 corn and soybean harvests are showing a reversal of transportation movements from the patterns of recent years. For the first time in seven years, corn exports overtook soybean exports during the first two months of the marketing year, marked by a steep drop in soybean exports to China. The shift in exports has changed the routing of some grain and oilseed movements to open additional storage and transportation capacity during this year's harvest, which may temporarily help boost the competitiveness of U.S. corn exports this year.

### Soybean and Corn Outlook

Although persistent wet weather has slowed the pace of the soybean harvest, USDA estimates soybean production this year could be the largest ever recorded. Combined with the record-high carryover from last year ([Grain Transportation Report 10/11/18](#)), this year's soybean supplies could reach a record high of 5,153 million bushels. USDA also estimates record corn supplies, at 16,968 million bushels, due to near-record corn production.

The movement of this year's grain harvest has not yet fully materialized on the rail and barge networks. With record export corn sales during the last marketing year, weekly grain carloadings were above the prior 3-year, 4-week average from April to September ([GTR Figure 3](#)). Similarly, weekly barge movements of grain trended near or above the 3-year average during the same period ([GTR Figure 10](#)). However, beginning in October 2018, both rail carloadings and barge movements of grain have fallen well below their 3-year averages.

The October edition of USDA's [Oil Crops Outlook](#) reported that changing export destinations for soybeans have caused initial export sales and shipments to be slower than usual and may shift a higher percentage of export sales into the second half of the 2018/19 marketing year. Given the pace of corn exports in recent months and the strong pace of recent sales and shipments, USDA's [Feed Outlook](#) in October reported corn exports during 2018/19 are expected to be 2,475 million bushels, which would exceed the previous year's record of 2,438 million bushels. The report also indicated the increase in the U.S. share of world corn exports is being helped by decreased Russian corn production, increased sales to Mexico, strong global demand, and record-high supplies. In addition, adequate capacity and lower rates across the transportation network may help contribute to the price competitiveness of U.S. corn exports relative to other countries.

### Transportation Impact

Typically, once harvested, soybeans destined for export are moved by rail and barge as quickly as possible while corn and other grain are kept in storage, due to the characteristic soybean marketing advantage enjoyed by the United States between October and February before the Brazilian crop is harvested. In addition, soybeans are more sensitive to spoilage over the long-term compared to corn and other grains. The post-harvest seasonal demand for moving soybeans is characterized by higher transportation rates as shippers seek available capacity on the rail and barge network. However, while straining storage capacity, the recent downward shift in soybean exports has increased available transportation capacity for corn and other grains during this year's harvest.

The additional transportation capacity has been partially reflected by relatively adequate availability of barges. Despite navigation disruptions caused by highwater conditions, average October barge rates for export grain, at major originating locations, are roughly 9 to 21 percent below the 5-year average. Cumulative rail carloadings of grain during the past 4 weeks are 8 percent below last year and 5 percent below the 5-year average. The 4-week average of secondary shuttle bids in October is 79 percent below last year and 94 percent below the 5-year average. Interestingly, the reverse has been true for non-shuttle

movements compared to last year, with the 4-week average of secondary non-shuttle bids in October 67 percent above last year, but still 75 percent below the 5-year average. This may be due to new transportation patterns mentioned previously.

### **Change in Export Ports**

Decreased soybean exports have been partially offset by increased corn exports at many export locations, which has changed transportation demand for export corn and soybean movements. During September and October, corn exports increased 71 percent, while soybean exports decreased 40 percent compared to the previous year. On average, barges account for about 94 percent of corn and 88 percent of soybean deliveries for export through the Mississippi Gulf, and railroads account for almost all corn and soybean deliveries for export through the PNW.

During September and October, exports of corn increased 1.8 million metric tons (mmt) from the Mississippi Gulf, but exports of soybeans decreased 2.5 mmt from the Mississippi Gulf from the same period last year. Given the net change, the total demand for corn and soybean transportation capacity to the Mississippi Gulf fell by 0.7 mmt, with a 0.5 mmt net decrease for barge and 0.2 mmt net decrease for rail. This translates into roughly 13 fewer 15-barge tows and 10 fewer 100-car shuttle trains, per month, delivered to the Mississippi Gulf.

In contrast, exports of corn during September and October increased 1.9 mmt through the PNW, but exports of soybeans decreased 2.1 mmt through the PNW compared to the same period last year. The Pacific Northwest accounted for 6 percent of corn exports and 25 percent of soybean exports during this period last year. This year it accounts for 25 percent of corn exports and 13 percent of soybean exports. Given the net change, total demand for corn and soybean transportation capacity to the PNW has fallen by roughly 0.2 mmt, about 10 fewer 100-car shuttle trains per month.

Exports of both soybeans and corn have been higher in September and October through the North Atlantic and Great Lakes, due to different export destinations and a higher number of destinations, compared to last year. Most of the additional supply to these locations has been by rail. This may account for some of the higher non-shuttle rates since these locations are not typical export destinations for grain by rail.

### **Conclusion**

Both soybeans and corn are projected to have record high supplies during the 2018/19 marketing year. However, the supply of rail and barge for grain and oilseed transportation has been adequate, so far, during the harvest. If the projected record amount of corn exports materializes, demand for grain transportation during the 2018/19 marketing year could be like last year. In addition, a shift in soybean exports to the second half of the marketing year could also create above-average demand for transportation later this year and early next year, compared to previous years.

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# 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
10/31/18	225	282	222	264	220	195
10/24/18	227	285	224	282	222	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)

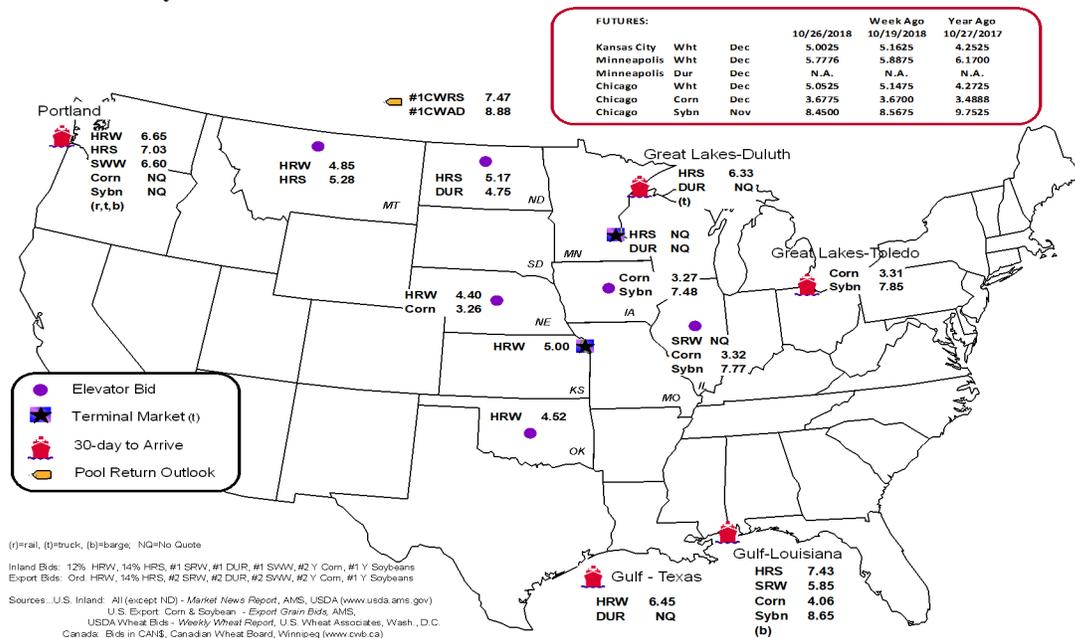
Commodity	Origin--Destination	10/26/2018	10/19/2018
Corn	IL--Gulf	-0.74	-0.82
Corn	NE--Gulf	-0.80	-0.87
Soybean	IA--Gulf	-1.17	-1.19
HRW	KS--Gulf	-1.45	-1.50
HRS	ND--Portland	-1.86	-1.95

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			
10/24/2018 <sup>p</sup>	1,032	373	5,094	541	7,040	10/20/2018	2,823
10/17/2018 <sup>r</sup>	848	765	3,439	411	5,463	10/13/2018	3,159
2018 YTD <sup>f</sup>	19,823	41,177	265,178	16,891	343,069	2018 YTD	102,798
2017 YTD <sup>f</sup>	24,600	66,924	232,563	17,075	341,162	2017 YTD	101,006
2018 YTD as % of 2017 YTD	81	62	114	99	101	% change YTD	102
Last 4 weeks as % of 2017 <sup>2</sup>	54	84	70	54	67	Last 4wks % 2017	127
Last 4 weeks as % of 4-year avg. <sup>2</sup>	42	62	61	47	57	Last 4wks % 4 yr	145
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.

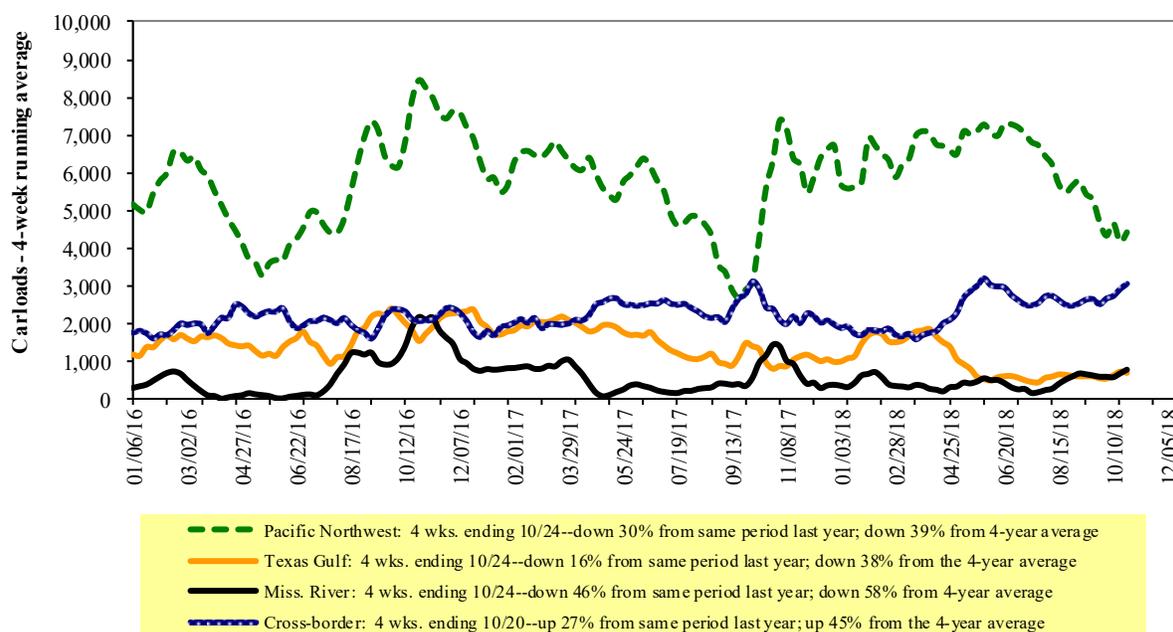
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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: 10/20/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,200	2,585	11,756	998	4,892	22,431	4,310	5,042
This week last year	2,617	2,984	11,558	1,238	5,628	24,025	4,802	5,674
2018 YTD	80,643	107,483	517,830	39,468	219,248	964,672	167,263	196,107
2017 YTD	70,405	115,074	465,609	40,552	238,764	930,404	158,918	195,056
2018 YTD as % of 2017 YTD	115	93	111	97	92	104	105	101
Last 4 weeks as % of 2017*	101	91	100	76	87	95	107	86
Last 4 weeks as % of 3-yr avg.**	90	83	96	82	79	89	96	97
Total 2017	89,465	142,745	578,964	50,223	289,574	1,150,971	198,418	244,766

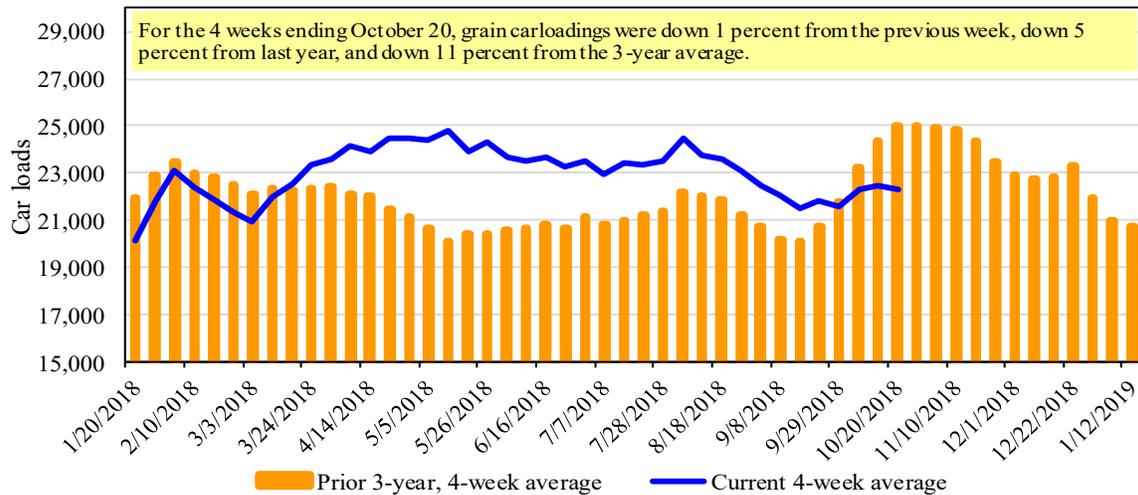
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*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: 10/25/2018		Delivery period							
		Nov-18	Nov-17	Dec-18	Dec-17	Jan-19	Jan-18	Feb-19	Feb-18
BNSF <sup>3</sup>	COT grain units	0	no bids	no offer	no bids	0	no bids	no offer	no bids
	COT grain single-car <sup>5</sup>	0	0	no offer	0	0	no bids	no offer	no bids
UP <sup>4</sup>	GCAS/Region 1	no offer	no bids	no offer	no bids	0	no bids	0	n/a
	GCAS/Region 2	no bid	no bids	no offer	no bids	0	no bids	0	n/a

<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.

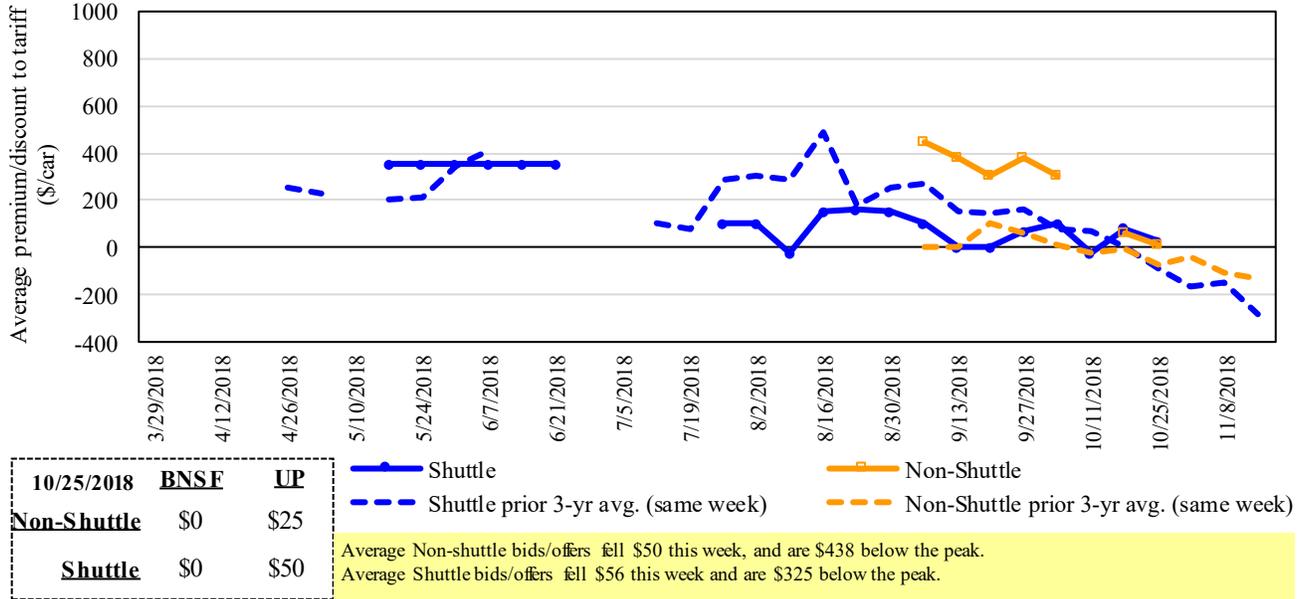
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

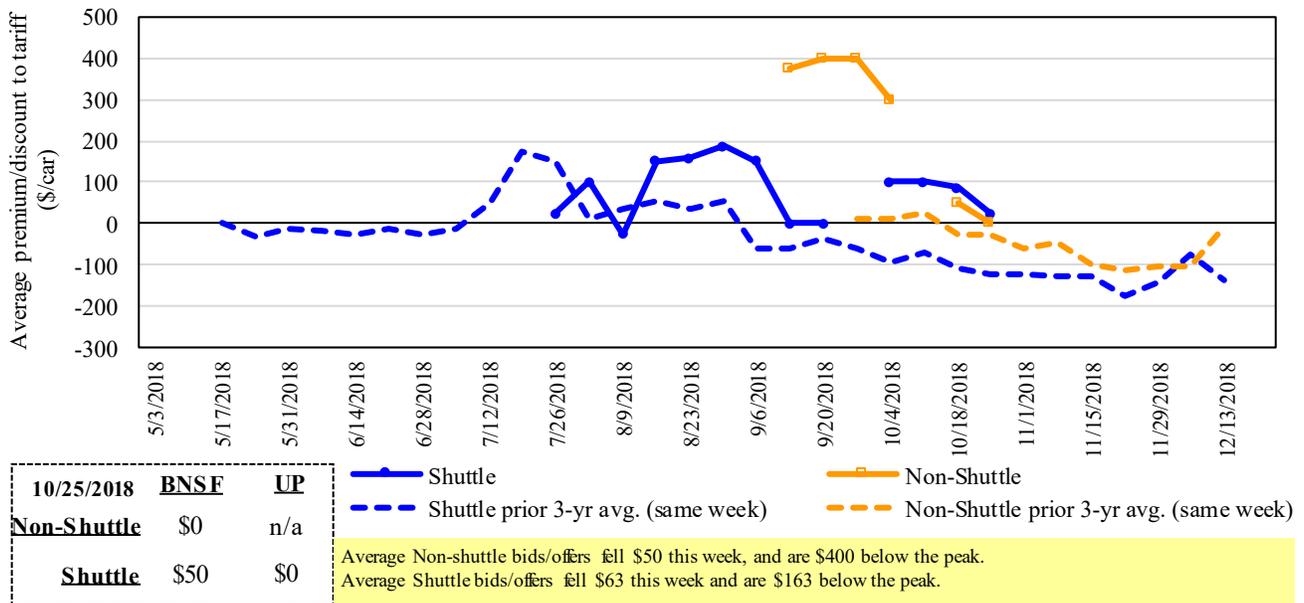
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



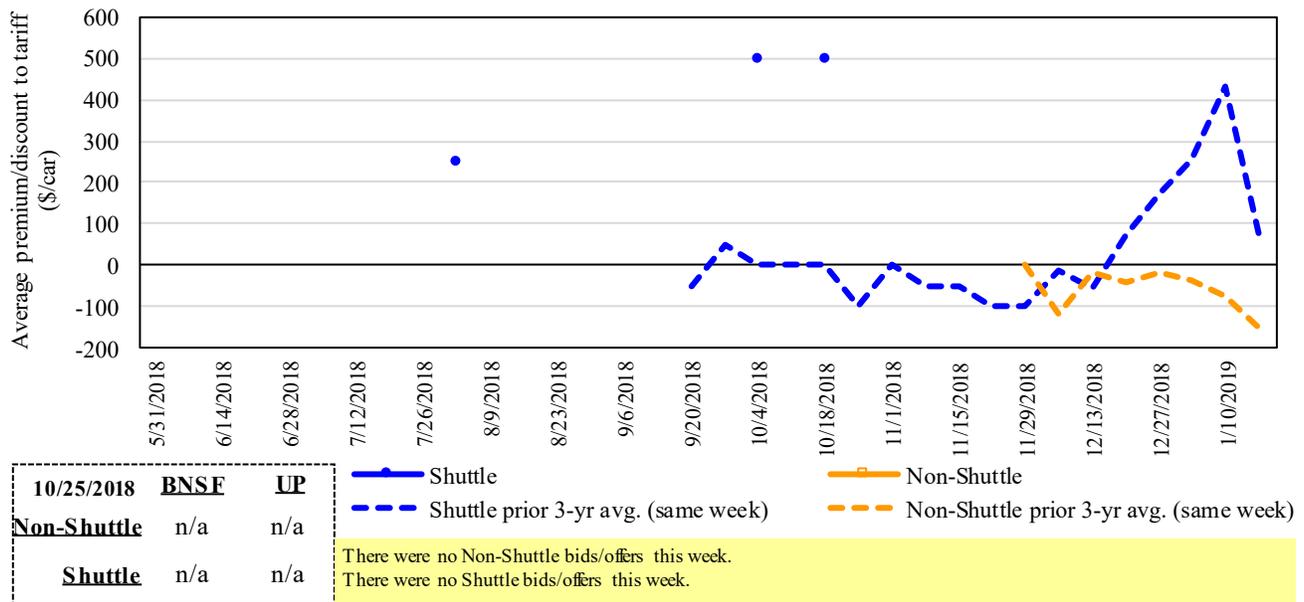
Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
 Source: Transportation & Marketing Programs/AMS/USDA

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



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**



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)<sup>1</sup>**

For the week ending:		Delivery period					
		Nov-18	Dec-18	Jan-19	Feb-19	Mar-19	Apr-19
Non-shuttle	<b>10/25/2018</b>						
	<b>BNSF-GF</b>	0	0	n/a	n/a	n/a	n/a
	Change from last week	(50)	0	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	<b>UP-Pool</b>	25	n/a	n/a	n/a	n/a	n/a
	Change from last week	(50)	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>BNSF-GF</b>	0	50	n/a	n/a	n/a	n/a
Change from last week	(125)	n/a	n/a	n/a	n/a	n/a	
Change from same week 2017	156	200	n/a	n/a	n/a	n/a	
Shuttle	<b>UP-Pool</b>	50	0	n/a	n/a	n/a	n/a
	Change from last week	12	(88)	n/a	n/a	n/a	n/a
	Change from same week 2017	125	206	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>**

November, 2018	Origin region <sup>3</sup>	Destination region <sup>3</sup>	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	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	2
	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	2
	Amarillo, TX	Los Angeles, CA	\$5,121	\$326	\$54.09	\$1.47	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$241	\$42.12	\$1.07	4
	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
	Des Moines, IA	Los Angeles, CA	\$5,327	\$438	\$57.24	\$1.45	3
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$246	\$43.46	\$1.18	16
	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	2
<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	4
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	4
	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	4
	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	2
	Toledo, OH	Huntsville, AL	\$4,634	\$0	\$46.02	\$1.25	6
	Grand Island, NE	Portland, OR	\$5,710	\$393	\$60.60	\$1.65	3

<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: November, 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>
					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	\$423	\$79.64	\$2.17	3
	TX	Salinas Victoria, NL	\$4,329	\$102	\$45.27	\$1.23	2
Corn	IA	Guadalajara, JA	\$8,528	\$387	\$91.09	\$2.31	4
	SD	Celaya, GJ	\$7,880	\$0	\$80.51	\$2.04	2
	NE	Queretaro, QA	\$8,207	\$351	\$87.43	\$2.22	4
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	2
	MO	Tlalnepantla, EM	\$7,573	\$342	\$80.87	\$2.05	4
	SD	Torreón, CU	\$7,480	\$0	\$76.43	\$1.94	2
Soybeans	MO	Bojay (Tula), HG	\$8,284	\$359	\$88.31	\$2.40	3
	NE	Guadalajara, JA	\$8,842	\$390	\$94.33	\$2.56	3
	IA	El Castillo, JA	\$9,110	\$0	\$93.08	\$2.53	2
	KS	Torreón, CU	\$7,714	\$288	\$81.76	\$2.22	4
Sorghum	NE	Celaya, GJ	\$7,527	\$358	\$80.56	\$2.04	4
	KS	Queretaro, QA	\$8,000	\$209	\$83.87	\$2.13	3
	NE	Salinas Victoria, NL	\$6,633	\$168	\$69.48	\$1.76	4
	NE	Torreón, CU	\$6,962	\$276	\$73.95	\$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.

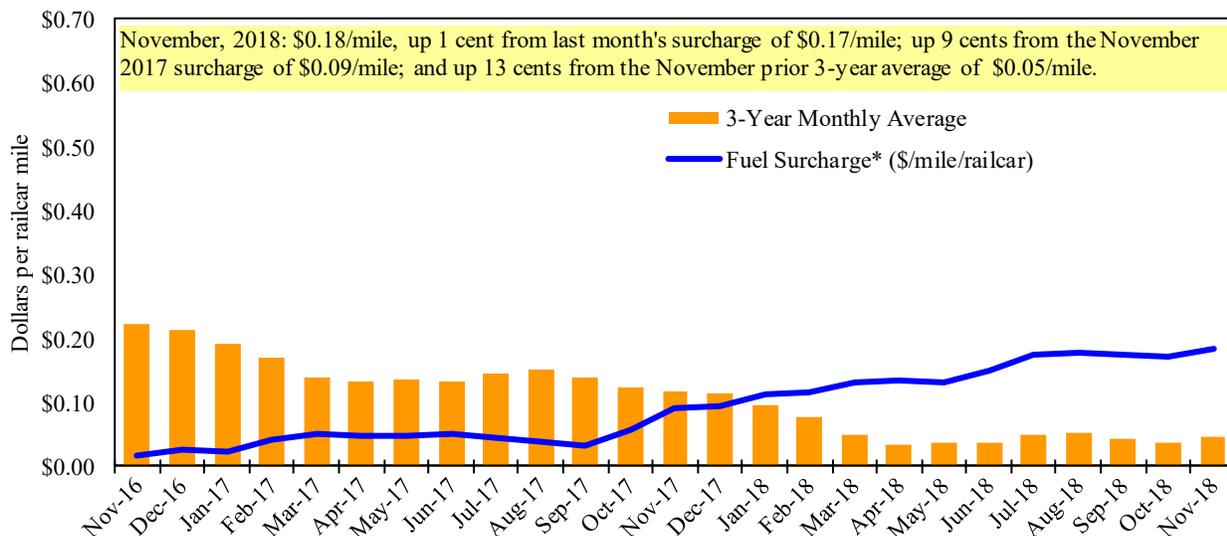
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

<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
<b>Rate<sup>1</sup></b>	10/30/2018	478	467	475	370	350	350	317
	10/23/2018	538	525	508	445	450	450	400
<b>\$/ton</b>	10/30/2018	29.59	24.84	22.04	14.76	16.42	14.14	9.95
	10/23/2018	33.30	27.93	23.57	17.76	21.11	18.18	12.56
<b>Current week % change from the same week:</b>								
	Last year	13	11	7	10	-13	-13	6
	3-year avg. <sup>2</sup>	-3	4	11	5	-18	-17	0
<b>Rate<sup>1</sup></b>	November	475	433	427	317	350	350	283
	January	-	-	395	292	342	342	270

<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.

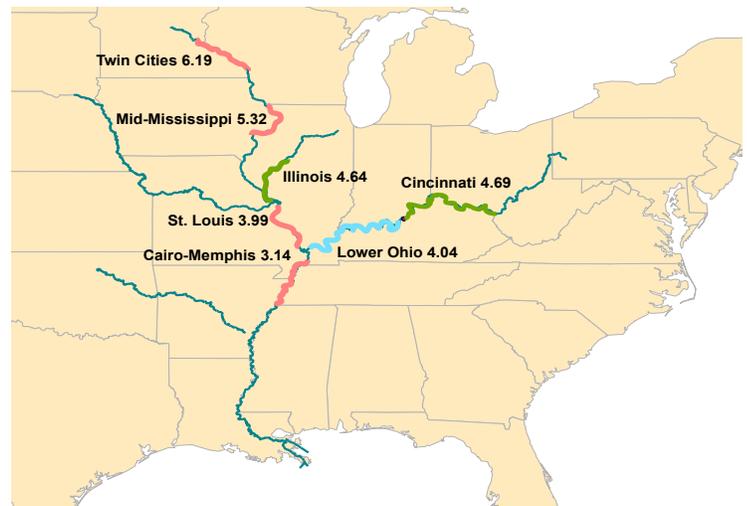
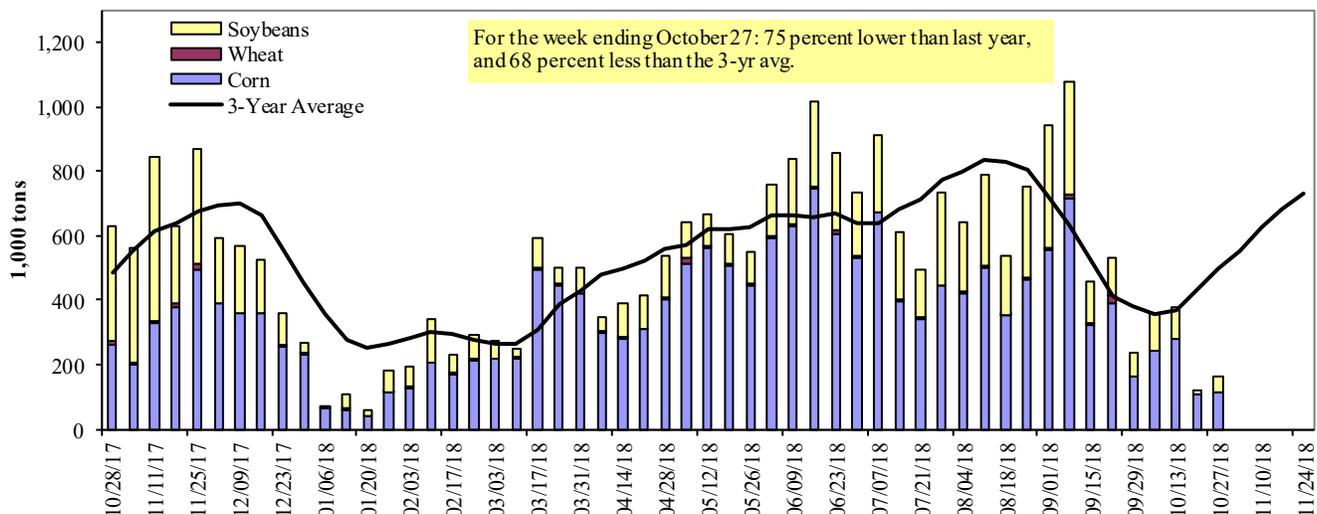


Figure 10

**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 10/27/2018	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	134	8	72	0	214
Winfield, MO (L25)	53	0	19	0	72
Alton, IL (L26)	113	5	46	0	165
Granite City, IL (L27)	113	3	45	0	161
<b>Illinois River (L8)</b>	49	2	52	0	102
<b>Ohio River (L52)</b>	137	0	80	0	217
<b>Arkansas River (L1)</b>	0	3	13	6	21
Weekly total - 2018	251	6	137	6	400
Weekly total - 2017	308	16	538	3	866
2018 YTD <sup>1</sup>	19,535	1,433	9,816	98	30,882
2017 YTD	18,726	2,041	12,201	265	33,232
2018 as % of 2017 YTD	104	70	80	37	93
Last 4 weeks as % of 2017 <sup>2</sup>	144	49	37	40	70
<b>Total 2017</b>	<b>22,242</b>	<b>2,210</b>	<b>16,123</b>	<b>360</b>	<b>40,936</b>

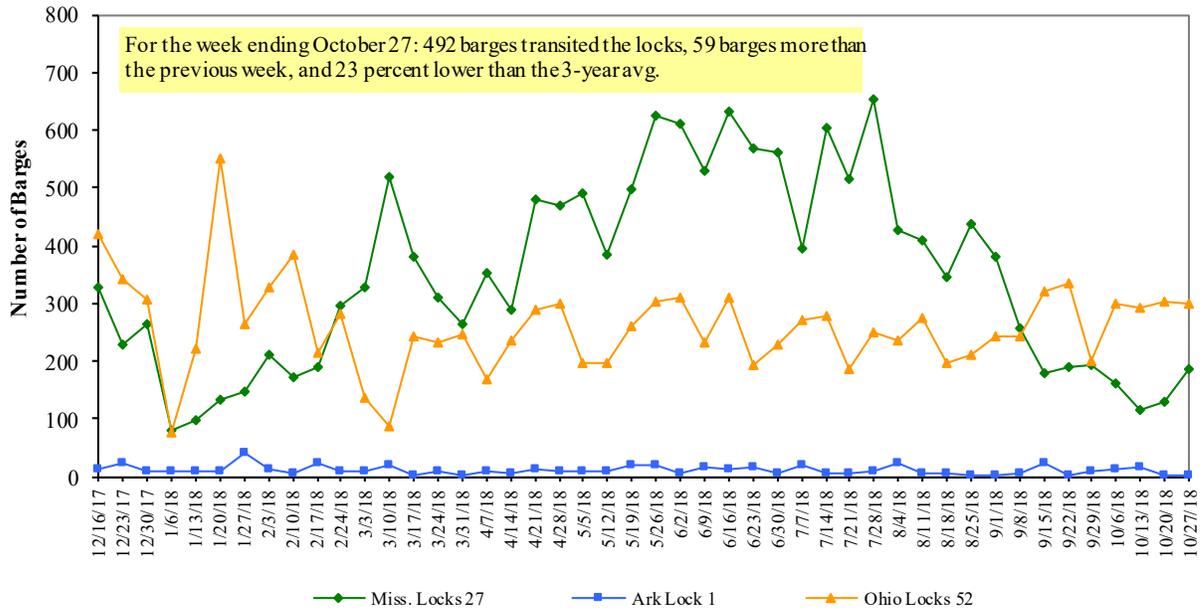
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

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

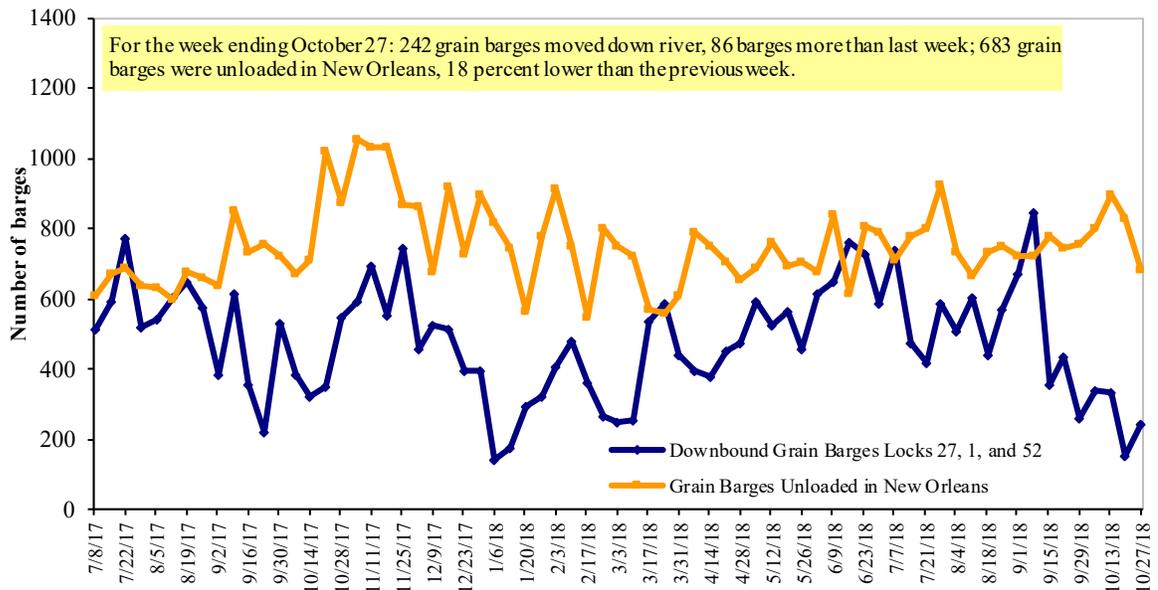
Source: U.S. Army Corps of Engineers

**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 10/29/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.346	-0.023	0.535
	New England	3.365	-0.003	0.595
	Central Atlantic	3.523	-0.010	0.585
	Lower Atlantic	3.217	-0.037	0.488
II	Midwest <sup>2</sup>	3.310	-0.023	0.500
III	Gulf Coast <sup>3</sup>	3.117	-0.035	0.478
IV	Rocky Mountain	3.405	-0.003	0.462
V	West Coast	3.848	-0.023	0.737
	West Coast less California	3.564	-0.023	0.544
	California	4.074	-0.022	0.889
Total	U.S.	3.355	-0.025	0.536

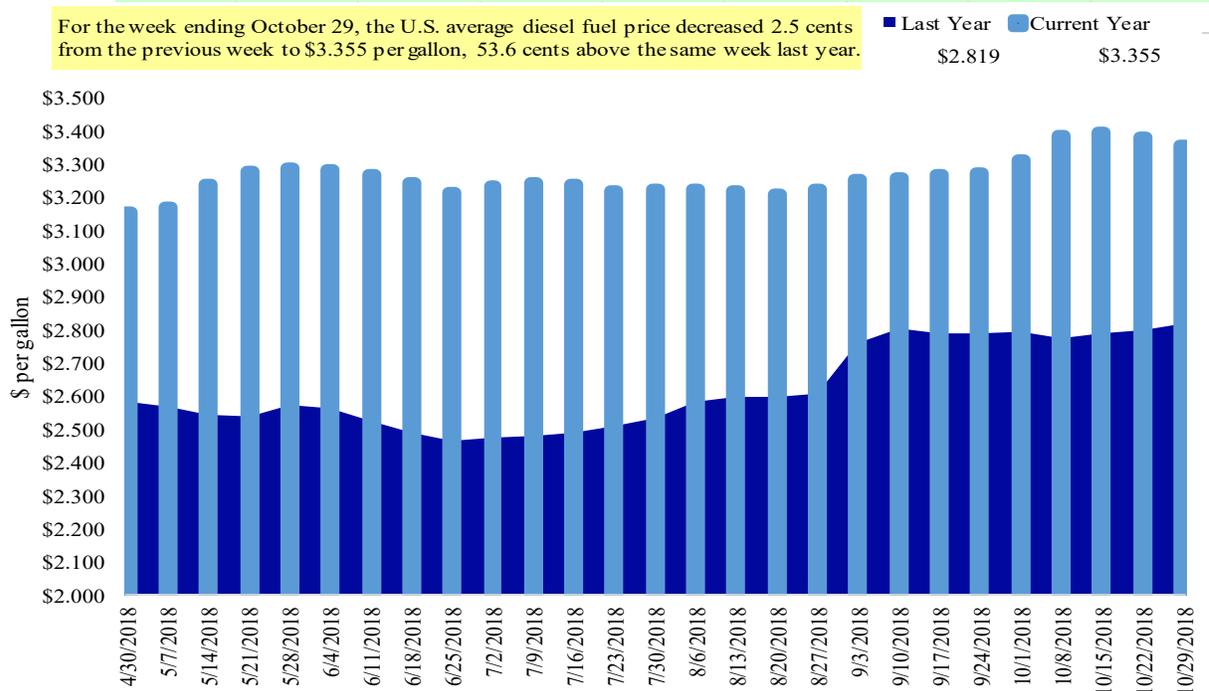
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
10/18/2018	1,322	609	1,603	1,031	99	4,664	12,947	14,882	32,493
This week year ago	1,516	560	1,621	1,253	74	5,023	11,576	18,852	35,451
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2018/19 YTD	2,251	937	2,378	2,088	240	7,893	8,491	6,174	22,558
2017/18 YTD	4,076	921	2,696	2,268	178	10,139	4,642	9,564	24,344
YTD 2018/19 as % of 2017/18	55	102	88	92	135	78	183	65	93
Last 4 wks as % of same period 2017/18	91	115	90	87	149	93	122	85	98
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 10/18/2018	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	6,901	7,116	(3)	13,691
Japan	3,324	2,057	62	11,247
Korea	1,876	401	368	4,754
Colombia	979	1,090	(10)	4,678
Peru	753	890	(15)	2,975
<b>Top 5 Importers</b>	<b>13,834</b>	<b>11,554</b>	<b>20</b>	<b>37,344</b>
<b>Total US corn export sales</b>	<b>21,438</b>	<b>16,217</b>	<b>32</b>	<b>53,184</b>
% of Projected	34%	26%		
Change from prior week <sup>2</sup>	<b>350</b>	<b>1,288</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	65%	71%		70%
<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 10/18/2018	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	1,027	14,438	(93)	31,228
Mexico	3,200	1,427	124	3,716
Indonesia	693	631	10	2,250
Japan	705	749	(6)	2,145
Netherlands	396	178	0	2,209
<b>Top 5 importers</b>	<b>6,020</b>	<b>17,423</b>	<b>(65)</b>	<b>41,549</b>
<b>Total US soybean export sales</b>	<b>21,055</b>	<b>28,416</b>	<b>(26)</b>	<b>55,113</b>
% of Projected	38%	49%		
Change from prior week <sup>2</sup>	<b>213</b>	<b>2,129</b>		
<b>Top 5 importers' share of U.S. soybean export sales</b>	29%	61%		<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/esrquery/. 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. (Carryover plus Accumulated Exports)

Table 15

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

For the week ending 10/18/2018	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	1,480	1,899	(22)	2,781
Japan	1,488	1,637	(9)	2,649
Philippines	1,823	1,866	(2)	2,441
Korea	854	1,039	(18)	1,257
Nigeria	583	734	(21)	1,254
Indonesia	410	690	(41)	1,076
Taiwan	569	655	(13)	1,066
China	0	722	(100)	944
Colombia	355	201	76	714
Thailand	538	440	22	618
<b>Top 10 importers</b>	<b>8,099</b>	<b>9,883</b>	<b>(18)</b>	<b>14,800</b>
<b>Total US wheat export sales</b>	<b>12,557</b>	<b>15,162</b>	<b>(17)</b>	<b>22,869</b>
% of Projected	45%	62%		
Change from prior week <sup>2</sup>	<b>443</b>	<b>361</b>		
<b>Top 10 importers' share of U.S. wheat export sales</b>	64%	65%		65%
<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/esrquery/. 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 10/25/18	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	295	205	144	10,805	12,708	85	199	160	14,805
Corn	186	129	145	17,157	10,238	168	n/a	874	10,928
Soybeans	342	68	500	7,104	8,697	82	23	23	13,246
<b>Total</b>	<b>824</b>	<b>402</b>	<b>205</b>	<b>35,066</b>	<b>31,642</b>	<b>111</b>	<b>78</b>	<b>73</b>	<b>38,978</b>
<b>Mississippi Gulf</b>									
Wheat	69	37	184	3,296	3,776	87	167	166	4,198
Corn	313	662	47	28,915	25,551	113	171	140	28,690
Soybeans	758	861	88	21,131	23,180	91	64	56	32,911
<b>Total</b>	<b>1,140</b>	<b>1,560</b>	<b>73</b>	<b>53,342</b>	<b>52,507</b>	<b>102</b>	<b>92</b>	<b>80</b>	<b>65,800</b>
<b>Texas Gulf</b>									
Wheat	0	154	0	2,512	5,657	44	55	57	6,354
Corn	0	7	0	665	695	96	103	128	733
Soybeans	0	0	n/a	69	85	80	0	0	292
<b>Total</b>	<b>0</b>	<b>162</b>	<b>0</b>	<b>3,245</b>	<b>6,437</b>	<b>50</b>	<b>51</b>	<b>44</b>	<b>7,379</b>
<b>Interior</b>									
Wheat	39	10	371	1,352	1,509	90	228	136	1,727
Corn	115	188	61	7,278	7,308	100	100	115	8,758
Soybeans	182	185	98	5,597	4,382	128	90	102	5,508
<b>Total</b>	<b>335</b>	<b>384</b>	<b>87</b>	<b>14,226</b>	<b>13,198</b>	<b>108</b>	<b>100</b>	<b>110</b>	<b>15,993</b>
<b>Great Lakes</b>									
Wheat	11	0	n/a	673	582	116	25	19	711
Corn	20	19	108	404	173	233	n/a	414	192
Soybeans	0	120	0	815	615	133	87	95	890
<b>Total</b>	<b>32</b>	<b>139</b>	<b>23</b>	<b>1,892</b>	<b>1,370</b>	<b>138</b>	<b>92</b>	<b>89</b>	<b>1,793</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	69	44	155	n/a	0	46
Corn	7	0	n/a	117	23	503	145	17	32
Soybeans	57	41	140	1,592	1,253	127	63	96	2,001
<b>Total</b>	<b>64</b>	<b>41</b>	<b>158</b>	<b>1,778</b>	<b>1,321</b>	<b>135</b>	<b>67</b>	<b>65</b>	<b>2,079</b>
<b>U.S. total from ports*</b>									
Wheat	414	407	102	18,706	24,275	77	144	124	27,841
Corn	641	1,006	64	54,537	43,988	124	197	164	49,333
Soybeans	1,339	1,274	105	36,307	38,213	95	52	49	54,847
<b>Total</b>	<b>2,394</b>	<b>2,688</b>	<b>89</b>	<b>109,549</b>	<b>106,476</b>	<b>103</b>	<b>87</b>	<b>79</b>	<b>132,021</b>

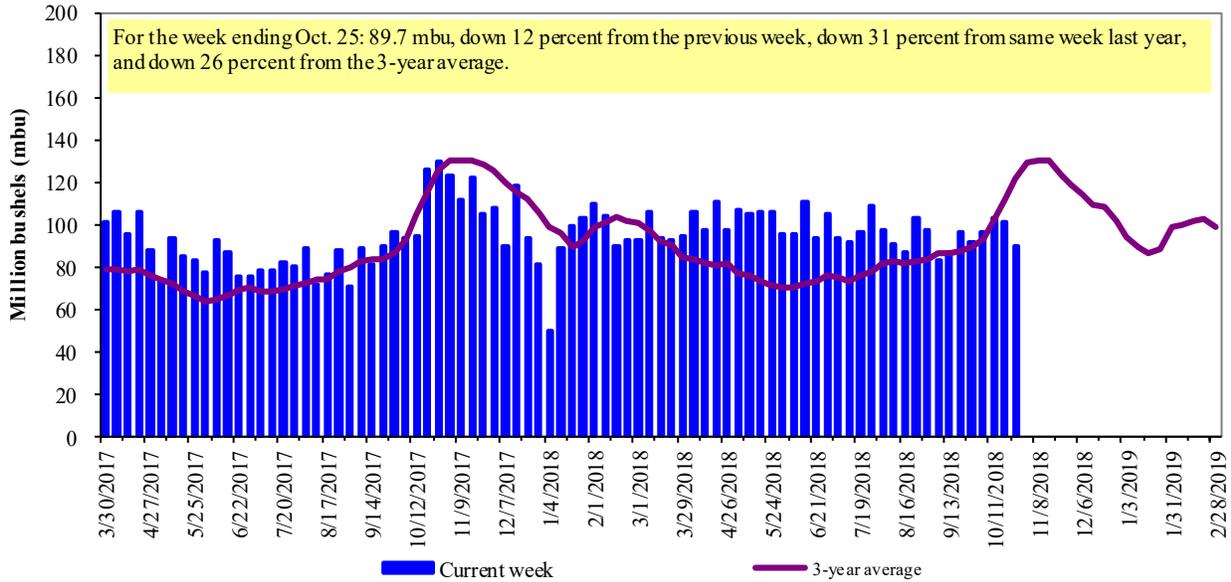
\*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)**

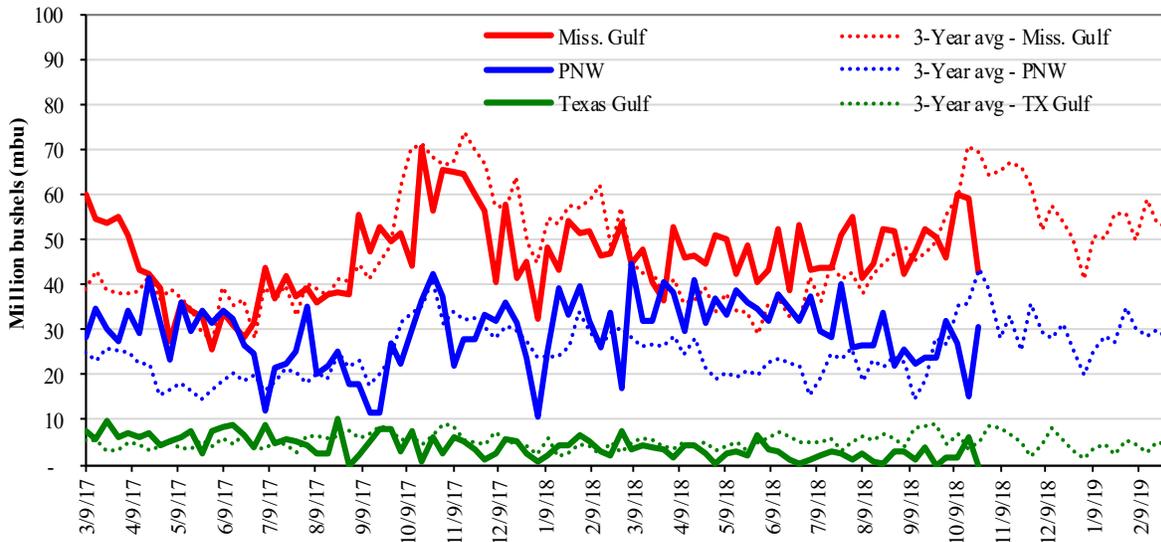


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)**



<u>Week ending 10/25/18 inspections (mbu):</u>		<u>Percent change from:</u>				
Mississippi Gulf:	42.7	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	30.8	Last Year (same week):	down 28	down 100	down 34	up 103
Texas Gulf:	0.0	3-yr avg. (4-wk. mov. Avg):	down 24	down 100	down 32	down 28
			down 33	down 100	down 38	down 13

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

# Ocean Transportation

Table 17

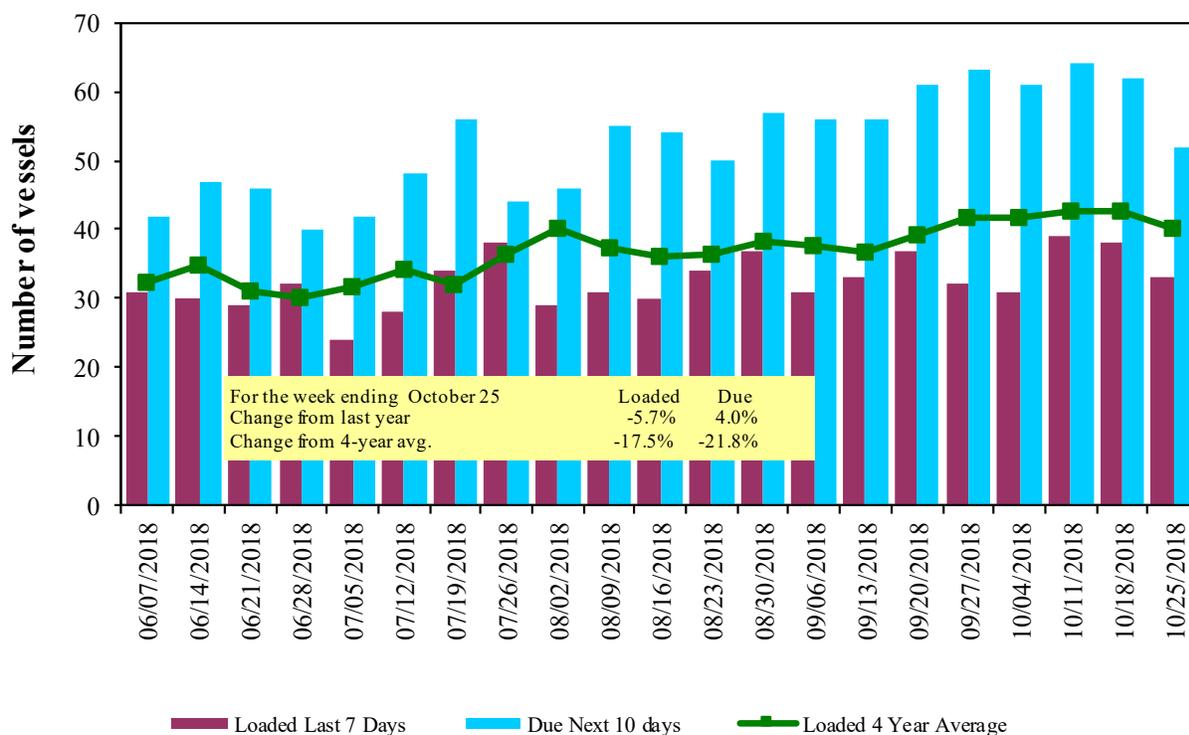
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
10/25/2018	51	33	52	10
10/18/2018	44	38	62	9
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

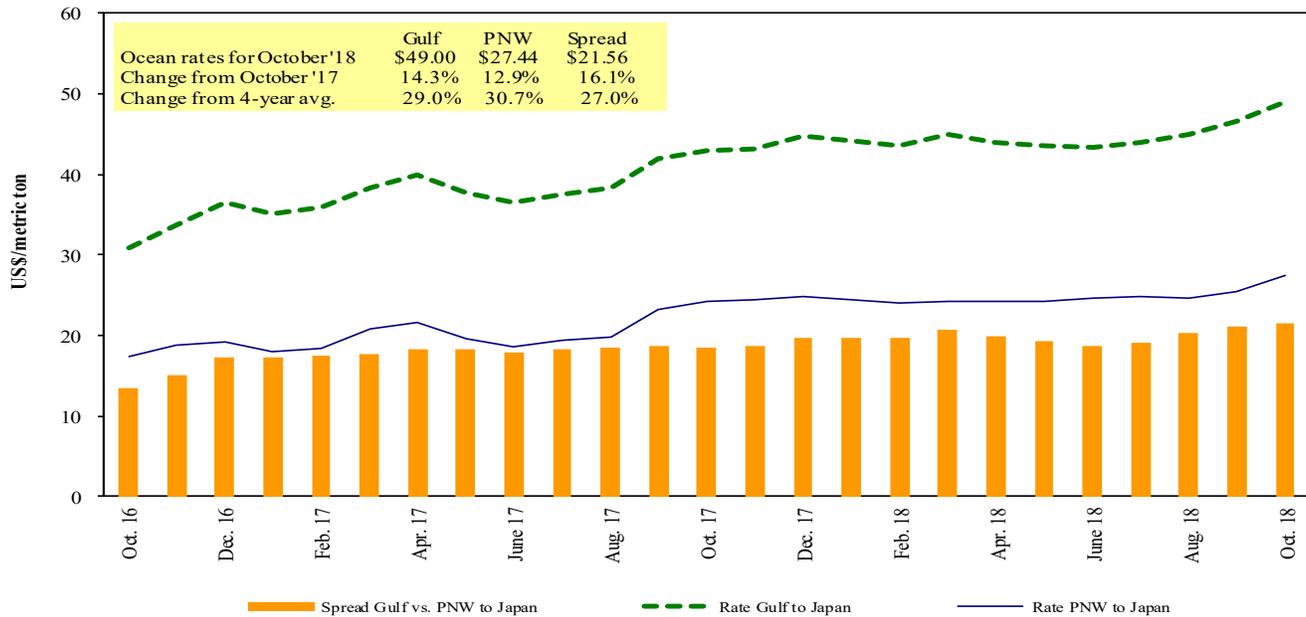
**U.S. Gulf Vessel Loading Activity**



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 10/27/2018**

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
Brazil	S.Korea	Heavy Grain	Nov 5/10	66,000	43.00

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

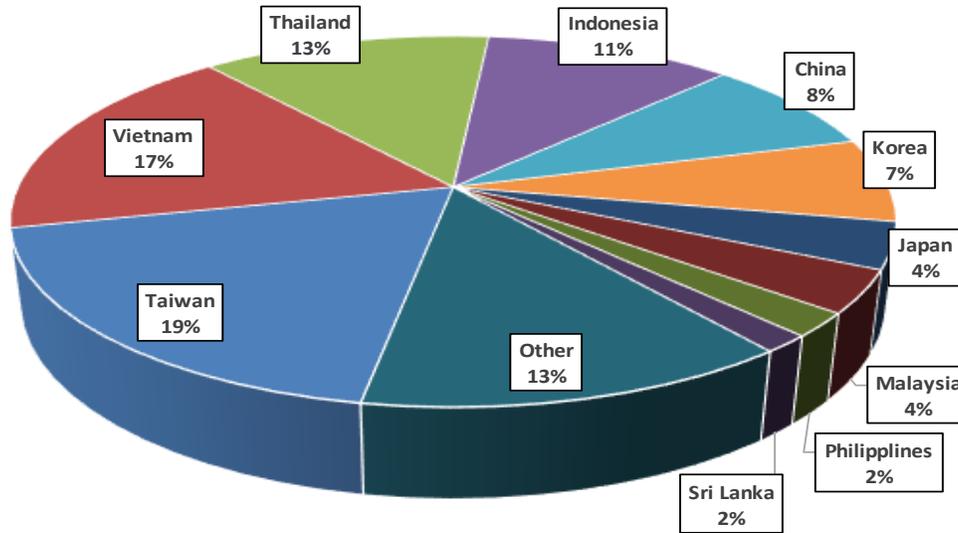
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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**

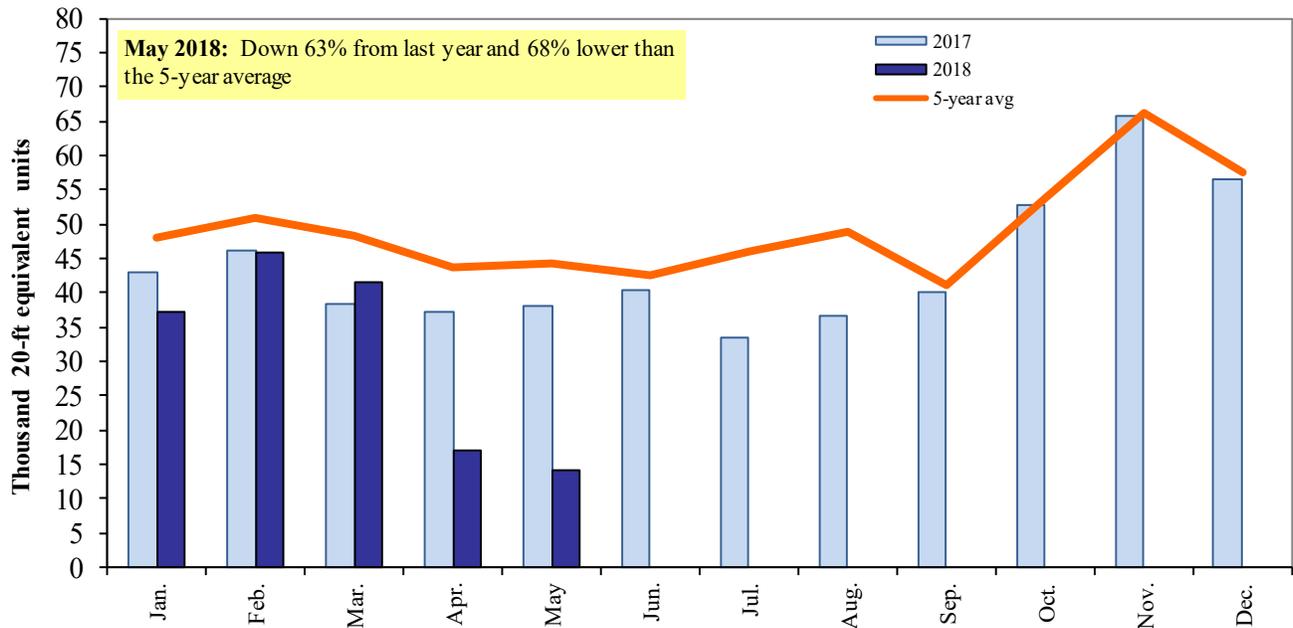


Service (PIERS) data

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.

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