United States Department of Agriculture

Grain Transportation Report

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

Contact Us

November 29, 2018

Contents

The next release is December 6, 2018

WEEKLY HIGHLIGHTS

Grain Commodities Show Mixed Inspection Trends

For the week ending November 22, grain (corn, wheat, and soybeans) inspections totaled 2.53 million metric tons (mmt), up 1 percent from last week and down 24 percent from the 3-year average. Inspections of corn and soybeans rose by 32 and 3 percent from the previous week, respectively, while wheat inspections fell 50 percent. Over the past 4 weeks, wheat and corn inspections were up 17 and 85 percent, respectively, from the 3-year average, while soybeans were down 48 percent. Pacific Northwest (PNW) inspections were down 21 percent, and wheat inspections down 66 percent. There were no soybeans inspected in the PNW during the week. Corn inspections out of the PNW were up 48 percent from the previous week. Total Mississippi Gulf inspections rose 16 percent week to week, as there was an increase in shipments to Asia and Europe.

Diesel Fuel Prices Continue Downward Trend

During the week ending November 26, U.S. on-highway **diesel fuel prices** decreased 2.1 cents per gallon, to $3.261. Over the past 6 weeks, prices have decreased 13.3 cents—reclaiming much of the 18.7 cent increase realized from late August through mid-October. Recent crude oil price data from the Energy Administration show a downward trend since early October, which helps relieve pressure on diesel fuel prices.

TRB Report Poses Key Questions on Transportation Issues

Last week, the Transportation Research Board (TRB) released a pre-published version of Critical Issues in Transportation 2018, which poses questions to explore for issues and opportunities that may arise 10 to 20 years into the future. The report notes, "…rankings of U.S. logistics and freight infrastructure systems show the United States lagging behind our trading partners. Freight movement is expected to continue to grow dramatically in the coming decades to serve an expanding population and growing economy. Without a resolution to funding shortfalls for public infrastructure, however, additional freight movements will increasingly contribute to bottlenecks and capacity problems. Growing expectations about the rapid delivery of goods ordered online and the need to solve the complexities and costs of urban freight movements, especially the 'last mile' problem, are particularly acute topics for the freight sector."

Snapshots by Sector

Export Sales

For the week ending November 15, **unshipped balances** of wheat, corn, and soybeans totaled 28.7 mmt, down 18 percent from the same time last year. Net weekly **wheat export sales** were .331 mmt, down 25 percent from the previous week. Net **corn export sales** were .877 mmt, down 2 percent from the previous week. Net **soybean export sales** were .681 mmt, up significantly from the past week.

Rail

U.S. Class I railroads originated 23,601 **grain carloads** for the week ending November 17; up 10 percent from the previous week, 8 percent from last year, and 2 percent from the 3-year average.

Average December shuttle **secondary railcar** bids/offers per car were $150 below tariff, for the week ending November 22, up $63 from last week, and $31 lower than last year. Average non-shuttle secondary railcar bids/offers were $3 below tariff, down $16 from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending November 24, **barge grain movements** totaled 917,008 tons, 25 percent higher than the previous week and down 22 percent from the same period last year.

For the week ending November 24, 576 grain barges **moved down river**, 101 barges more than the previous week. There were 864 grain barges **unloaded in New Orleans**, 9 percent higher than the previous week.

Ocean

For the week ending November 22, 37 **ocean-going grain vessels** were loaded in the Gulf, 6 percent more than the same period last year. Fifty-four vessels are expected to be loaded within the next 10 days, 10 percent more than the same period last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* November 29, 2018.
Web: **http://dx.doi.org/10.9752/TS056.11-29-2018**

Feature Article/Calendar

Soybean Landed Costs to China Decrease from United States and Brazil

The third quarter landed costs of shipping soybeans from the United States and Brazil to Europe and China decreased from the previous quarter. The landed costs fell due to a combination of lower transportation costs and farm values from the previous quarter. The landed costs for shipping soybeans from Minneapolis, MN and Davenport, IA through the U.S. Gulf to Hamburg, Germany decreased 9 and 10 percent from the previous quarter, respectively (Table 1). The landed costs of shipping from both origins to Shanghai, China decreased by 8 percent from the previous quarter (Table 2). The landed costs from Fargo, ND and Sioux Falls, IA through the Pacific Northwest to Shanghai, China fell by 8 and 9 percent, respectively, from the previous quarter (table 2).

In comparison, the landed costs of shipping soybeans from North Mato Grosso (North MT) and South Goiás (South GO) in Brazil to Hamburg, Germany fell by 7 and 5 percent, respectively, from the previous quarter (Table 1). The landed costs of shipping from both Brazilian origins to Shanghai, China decreased by 7 and 5 percent from the previous quarter as well.

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2017 3rd qtr.	2018 2nd qtr.	2018 3rd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2017 3rd qtr.	2018 2nd qtr.	2018 3rd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					Davenport, IA --$/mt--				
Truck	13.02	12.06	10.54	-19.05	-12.60	13.02	12.06	10.54	-19.05	-12.60
Barge	27.02	38.14	36.30	34.34	-4.82	20.11	30.79	29.20	45.20	-5.16
Ocean[1]	15.03	20.67	21.06	40.12	1.89	15.03	20.67	21.06	40.12	1.89
Total transportation	55.07	70.87	67.90	23.30	-4.19	48.16	63.52	60.80	26.25	-4.28
Farm Value[2]	333.76	348.21	315.38	-5.51	-9.43	351.27	353.35	317.83	-9.52	-10.05
Landed Cost[3]	388.83	419.08	383.28	-1.43	-8.54	399.43	416.87	378.63	-5.21	-9.17
Transport % of landed cost	14.16	16.91	17.72			12.06	15.24	16.06		
	Brazil									
	North MT[4] - Santos[5] --$/mt--					South GO[4] - Paranagua[5] --$/mt--				
Truck	102.87	101.44	92.79	-9.80	-8.53	59.36	59.89	52.61	-11.37	-12.16
Ocean[6]	26.00	25.00	24.00	-7.69	-4.00	27.00	26.00	25.00	-7.41	-3.85
Total transportation	128.87	126.44	116.79	-9.37	-7.63	86.36	85.89	77.61	-10.13	-9.64
Farm Value[7]	288.62	323.46	301.39	4.42	-6.82	291.58	313.65	302.33	3.69	-3.61
Landed Cost	417.49	449.90	418.18	0.17	-7.05	377.94	399.54	379.94	0.53	-4.91
Transport % of landed cost	30.87	28.10	27.93			22.85	21.50	20.43		

[1]Source: O'Neil Commodity Consulting
[2]Source: USDA/NASS
[3]Landed cost is total cost plus farm value
[4]Producing regions: MT= Mato Grosso, GO = Goiás
[5]Export ports
[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br
Note: Total may not add exactly due to rounding

Although there were slight increases in ocean and rail tariff rates, quarter-to-quarter transportation costs fell in the United States due to decreases in truck and barge rates. Despite navigation disruptions caused by high water conditions, the average barge rate declined during the third quarter, compared to the previous quarter. Reduced demand for barge services, caused by a recent decrease in soybean exports, led to lower barge rates (see November 15, 2018 *Grain Transportation Report (GTR*). Reduced demand also caused the truck rate for transporting soybeans to barge-served river elevators, to fall during the quarter. On average, 88 percent of soybean deliveries for export, through the Mississippi Gulf, are delivered by barge (see November 1, 2018 [GTR](#)). However, rail tariff rates to rail-served elevators increased slightly during the quarter, compared to the previous quarter. Despite a reduction in soybean exports, strength in global iron ore and coal demand pushed up ocean freight rates for shipping bulk commodities, including grain from the United States to Europe and China, during the third quarter (see October 25, 2018 [GTR](#)).

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2017 3rd qtr.	2018 2nd qtr.	2018 3rd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2017 3rd qtr.	2018 2nd qtr.	2018 3rd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN --$/mt--					**Davenport, IA** --$/mt--				
Truck	13.02	12.06	10.54	-19.05	-12.60	13.02	12.06	10.54	-19.05	-12.60
Barge	27.02	38.14	36.30	34.34	-4.82	20.11	30.79	29.20	45.20	-5.16
Ocean[1]	38.37	42.69	44.05	14.80	3.19	38.37	42.69	44.05	14.80	3.19
Total transportation	78.41	92.89	90.89	15.92	-2.15	71.50	85.54	83.79	17.19	-2.05
Farm Value[2]	333.76	348.21	315.38	-5.51	-9.43	351.27	353.35	317.83	-9.52	-10.05
Landed Cost[3]	412.17	441.10	406.27	-1.43	-7.90	422.77	438.89	401.62	-5.00	-8.49
Transport % of landed cost	19.02	21.06	22.37			16.91	19.49	20.86		
	Via PNW									
	Fargo, ND					**Sioux Falls, SD**				
Truck	13.02	12.06	10.54	-19.05	-12.60	13.02	12.06	10.54	-19.05	-12.60
Rail[4]	54.62	54.62	55.11	0.90	0.90	55.61	55.61	56.11	0.90	0.90
Ocean	20.16	23.72	24.26	20.34	2.28	20.16	23.72	24.26	20.34	2.28
Total transportation	87.80	90.40	89.91	2.40	-0.54	88.79	91.39	90.91	2.39	-0.53
Farm Value	319.06	339.39	305.95	-4.11	-9.85	325.55	344.90	306.20	-5.94	-11.22
Landed Cost	406.86	429.79	395.86	-2.70	-7.89	414.34	436.29	397.11	-4.16	-8.98
Transport % of landed cost	21.58	21.03	22.71			21.43	20.95	22.89		
	Brazil									
	North MT[5] - Santos[6] --$/mt--					**South GO[5] - Paranagua[6]** --$/mt--				
Truck	102.87	101.44	92.79	-9.80	-8.53	59.36	59.89	52.61	-11.37	-12.16
Ocean[7]	30.00	31.00	27.75	-7.50	-10.48	31.00	32.00	28.75	-7.26	-10.16
Total transportation	132.87	132.44	120.54	-9.28	-8.99	90.36	91.89	81.36	-9.96	-11.46
Farm Value[8]	288.62	323.46	301.39	4.42	-6.82	291.58	313.65	302.33	3.69	-3.61
Landed Cost	421.49	455.90	421.93	0.10	-7.45	381.94	405.54	383.69	0.46	-5.39
Transport % of landed cost	31.52	29.05	28.57			23.66	22.66	21.20		

[1]Source: O'Neil Commodity Consulting
[2]Source: USDA/NASS
[3]Landed cost is transportation cost plus farm value
[4]Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets, which could exceed the rail tariff rate plus fuel surcharge shown in the table.
[5]Producing regions: MT= Mato Grosso, GO = Goiás
[6]Export ports
[7]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[8]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br
Note: Total may not add exactly due to rounding

In addition to the transportation costs, soybean farm values fell in both the United States and Brazil during the third quarter, compared to the previous quarter. Year-to-year landed costs fell in the United States and rose marginally in Brazil. Soybean landed costs, from the United States to Europe, ranged from $379 to $383 per metric ton (mt) (Table1), and $396 to $406 per mt to China (Table 2). Brazil's landed costs to Europe ranged from $380 to $418 to Europe (Table 1) and $384 to $422 to China (Table 2). The U.S. transportation share of the landed costs ranged from 16 to 18 percent to Europe (Table 1) and 21 to 23 percent to China (Table 2). Brazil's share of the landed costs ranged from 20 to 28 percent, to Europe, (Table 1) and 21 to 29 percent, to Brazil (Table 2).

China imported 0.38 million metric tons (mmt) of U.S. soybeans during the third quarter of 2018, compared to 4.38 mmt during the same period in 2017. The significant drop in soybean imports comes after China imposed tariffs on U.S. soybean imports on July 6. Lower U.S. soybean exports and higher stocks have reduced soybean prices and basis (see October 11, 2018 [GTR](#)). Lower U.S. farm prices contributed to the decline in soybean landed costs, which may boost the competitiveness of soybeans and U.S. exports in the longer term. *surajudeen.olowolayemo@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

For the week ending	Truck	Rail: Unit Train	Rail: Shuttle	Barge	Ocean: Gulf	Ocean: Pacific
11/28/18	219	273	214	179	n/a	n/a
11/21/18	220	282	212	178	215	190

[1]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 Program/AMS/USDA

n/a = not availabe due to Thanksgiving holiday

Table 2

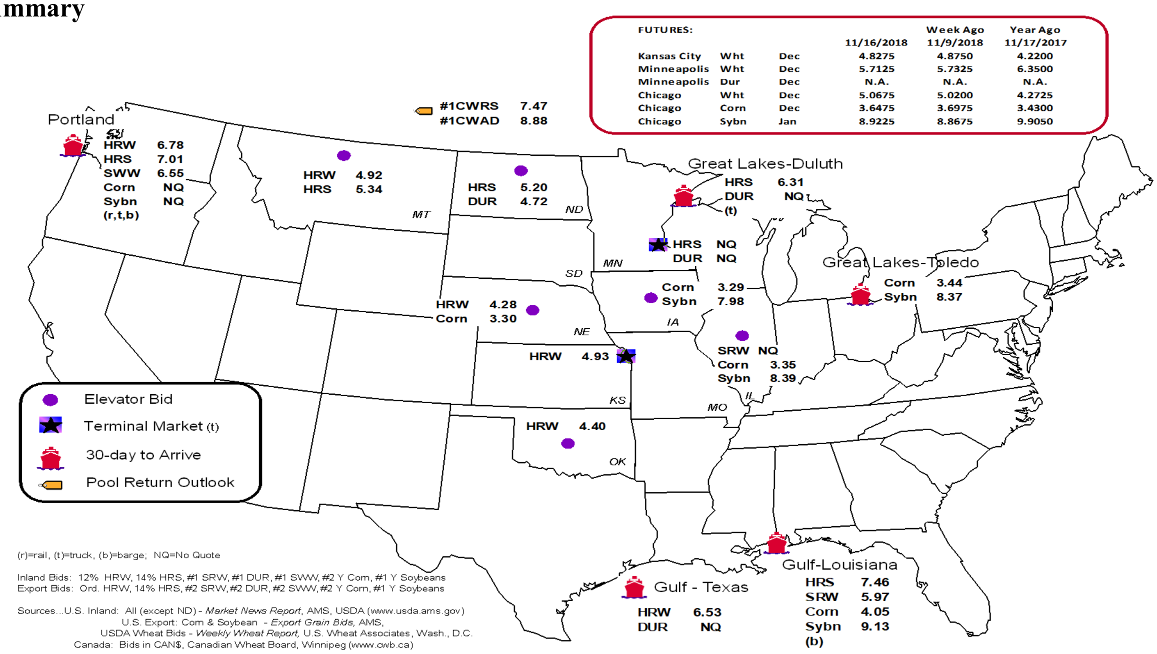
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	11/23/2018	11/16/2018
Corn	IL--Gulf	n/a	-0.70
Corn	NE--Gulf	n/a	-0.75
Soybean	IA--Gulf	n/a	-1.15
HRW	KS--Gulf	n/a	-1.60
HRS	ND--Portland	n/a	-1.81

Note: nq = no quote; n/a = not available due to the Thanksgiving holiday
Source: Transportation & Marketing Program/AMS/USDA

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

Figure 1
Grain Bid Summary



Rail Transportation

Table 3
Rail Deliveries to Port (carloads)[1]

For the Week Ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
11/21/2018[p]	204	392	4,624	468	5,688	11/18/2018	3,069
11/14/2018[r]	204	751	4,628	566	6,149	11/11/2018	3,125
2018 YTD[r]	21,380	43,227	285,392	19,553	369,552	2018 YTD	115,507
2017 YTD[r]	27,114	71,553	257,347	20,433	376,447	2017 YTD	109,114
2018 YTD as % of 2017 YTD	79	60	111	96	98	% change YTD	106
Last 4 weeks as % of 2017[2]	62	44	82	63	74	Last 4wks % 2017	157
Last 4 weeks as % of 4-year avg.[2]	31	34	75	50	61	Last 4wks % 4 yr	146
Total 2017	28,796	76,545	289,178	21,999	416,518	Total 2017	119,661
Total 2016	36,925	88,035	299,604	29,007	453,571	Total 2016	92,982

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2017 and prior 4-year average.

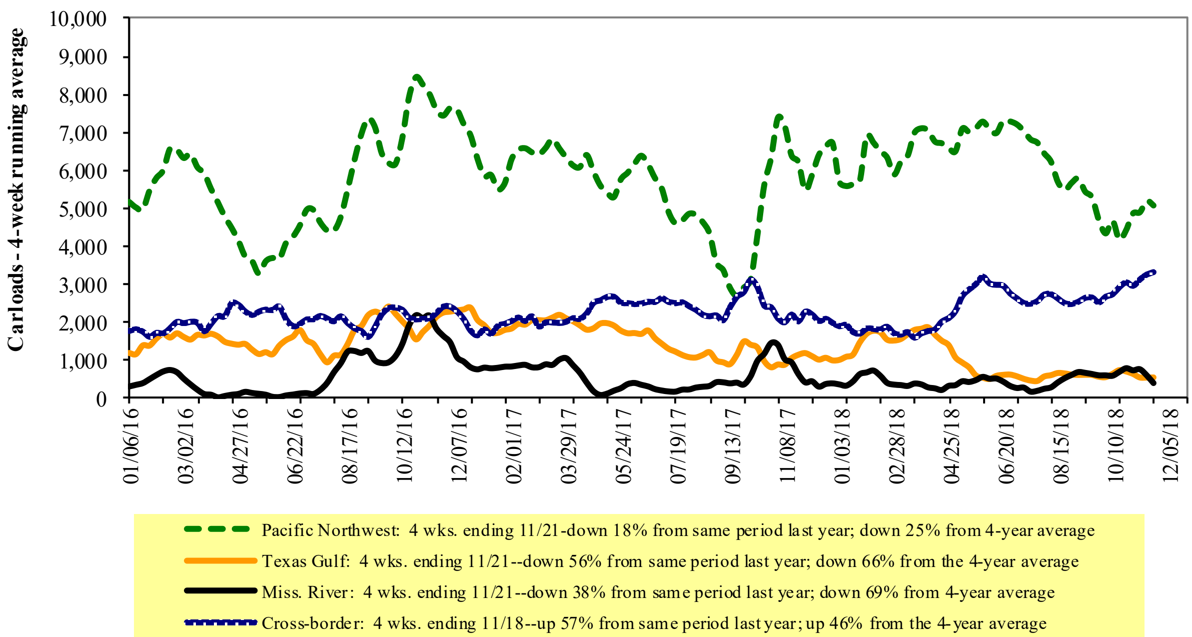
[3] Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Grupo Mexico.

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

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2
Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

For the week ending: 11/17/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,961	2,364	13,186	1,066	5,024	23,601	5,377	5,270
This week last year	2,188	2,652	10,900	1,235	4,958	21,933	4,929	4,680
2018 YTD	89,365	116,709	565,249	43,034	239,030	1,053,387	186,808	216,654
2017 YTD	78,760	127,337	509,819	45,111	260,104	1,021,131	177,471	215,925
2018 YTD as % of 2017 YTD	113	92	111	95	92	103	105	100
Last 4 weeks as % of 2017*	104	75	107	78	93	98	105	98
Last 4 weeks as % of 3-yr avg.**	97	68	100	92	84	91	100	97
Total 2017	89,465	142,831	578,964	50,223	289,574	1,151,057	198,458	244,766

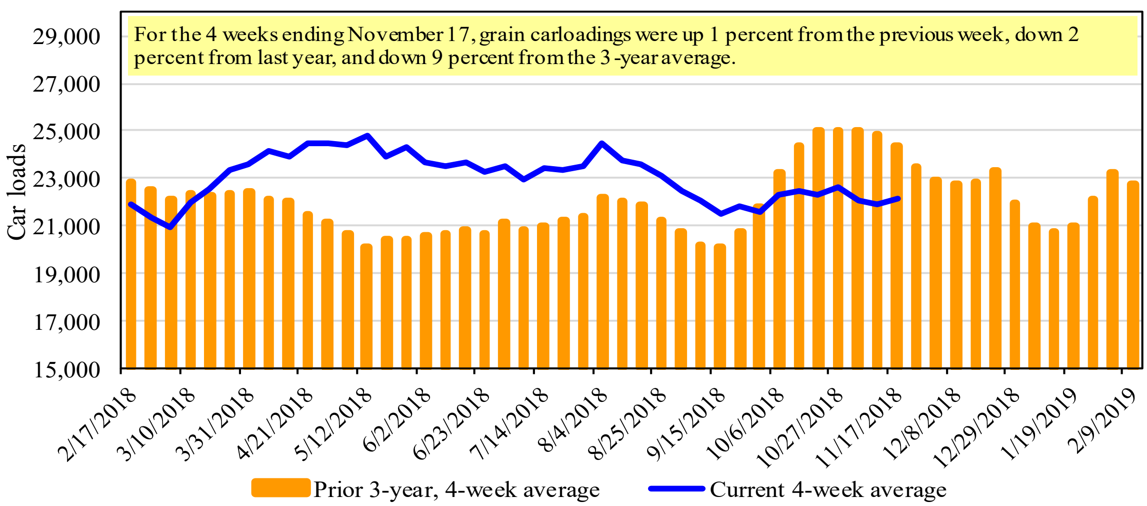
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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[1] ($/car)[2]

For the week ending: 11/22/2018		Dec-18	Dec-17	Jan-19	Jan-18	Feb-19	Feb-18	Mar-19	Mar-18
		Delivery period							
BNSF[3]	COT grain units	no offer	no bids	no bid	no bids	no bid	no bids	no bid	no bids
	COT grain single-car[5]	no offer	0	54	no bids	19	no bids	9	no bids
UP[4]	GCAS/Region 1	no bid	no bids	no bid	10	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bid	10	32	no bids	no offer	no offer	n/a	n/a

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

[2]Average premium/discount to tariff, last auction

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

[4]UP - GCAS = Grain Car Allocation System

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

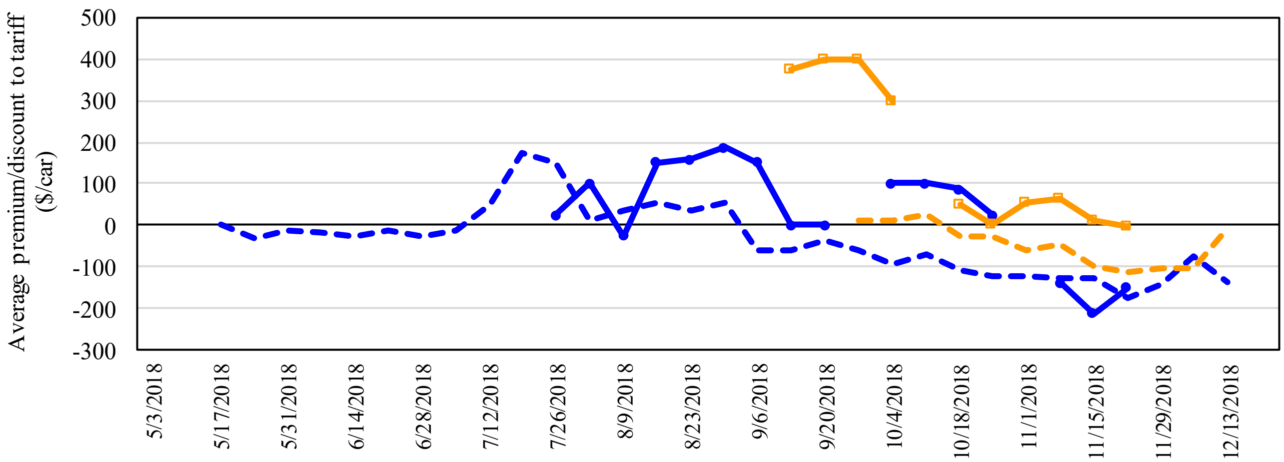
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Program/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 December 2018, Secondary Market



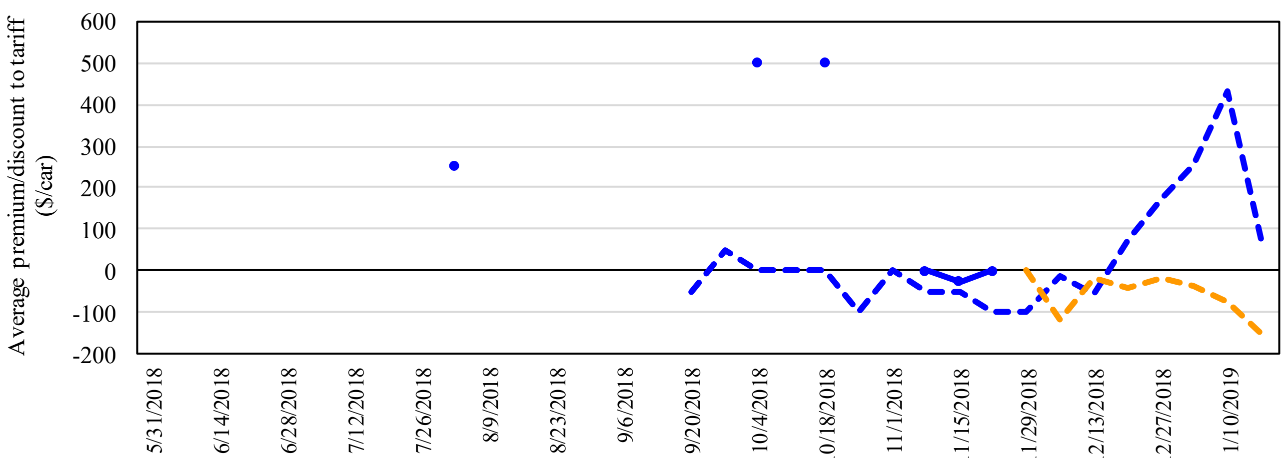
11/22/2018	BNSF	UP
Non-Shuttle	$25	-$31
Shuttle	-$50	-$250

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

Average Non-shuttle bids/offers fell $16 this week, and are $403 below the peak.
Average Shuttle bids/offers rose $63 this week and are $338 below the peak.

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

Figure 5
Bids/Offers for Railcars to be Delivered in January 2019, Secondary Market



11/22/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	$0

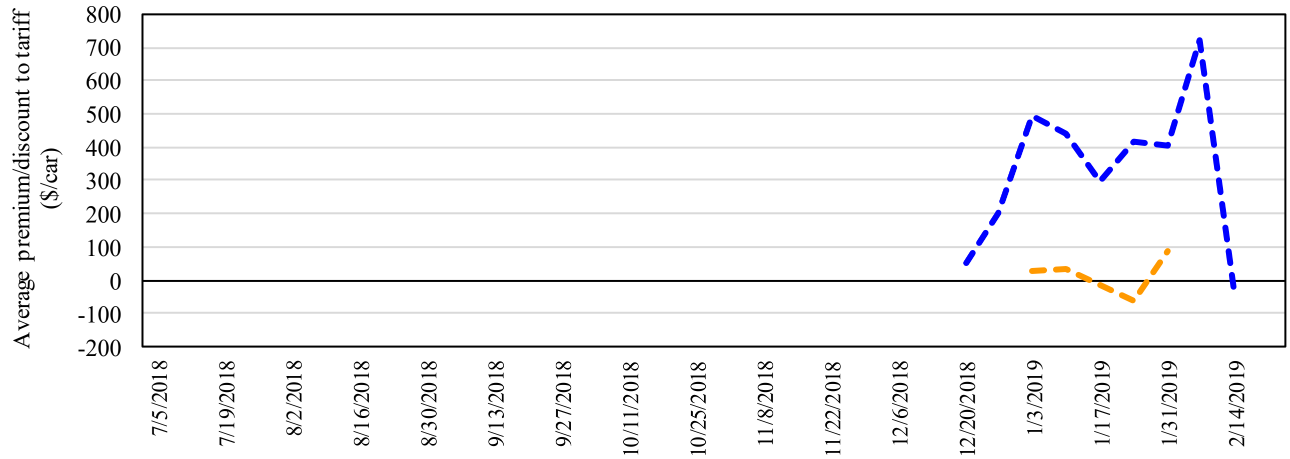
Shuttle — Shuttle prior 3-yr avg. (same week) — Non-Shuttle — Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers rose $25 this week and are $500 below the peak.

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

Figure 6

Bids/Offers for Railcars to be Delivered in February 2019, Secondary Market



11/22/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

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 this week.
There were no Shuttle bids/offers this week.

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

Table 6

Weekly Secondary Railcar Market ($/car)[1]

	For the week ending: 11/22/2018	Delivery period					
		Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19
Non-shuttle	**BNSF-GF**	**25**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	12	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
	UP-Pool	**(31)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(44)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(50)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	175	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	(125)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(250)**	**0**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	(50)	25	n/a	n/a	n/a	n/a
	Change from same week 2017	63	n/a	n/a	n/a	n/a	n/a

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

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

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

Sources: Transportation and Marketing Program/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[1]

November, 2018	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,983	$121	$40.76	$1.11	4
	Grand Forks, ND	Duluth-Superior, MN	$4,268	$0	$42.38	$1.15	3
	Wichita, KS	Los Angeles, CA	$7,175	$0	$71.25	$1.94	2
	Wichita, KS	New Orleans, LA	$4,540	$214	$47.21	$1.28	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
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$4,078	$0	$40.50	$1.10	3
	Wichita, KS	Galveston-Houston, TX	$4,296	$0	$42.66	$1.16	3
	Chicago, IL	Albany, NY	$5,896	$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

[1]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.

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

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

[4]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

Commodity	Origin state	Destination region	Tariff rate/car[1]	Fuel surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	Tariff plus surcharge per: bushel[3]	Percent change[4] Y/Y
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	Torreon, 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	Torreon, 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	Torreon, CU	$6,962	$276	$73.95	$1.88	4

[1] 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.

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

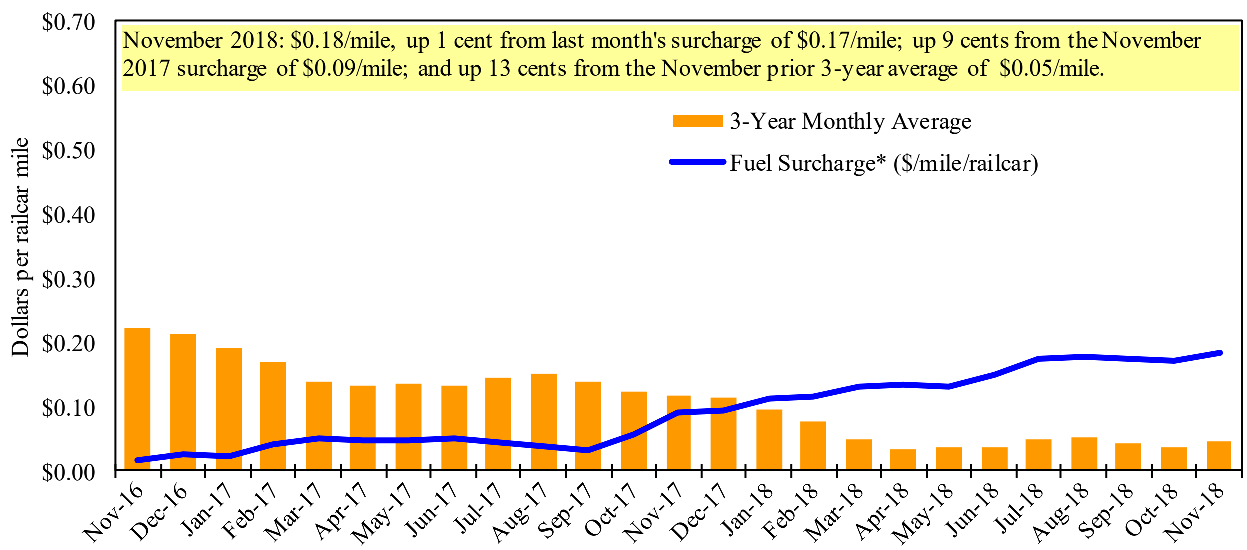
[3] Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[4] Percentage change calculated using tariff rate plus fuel surchage

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]

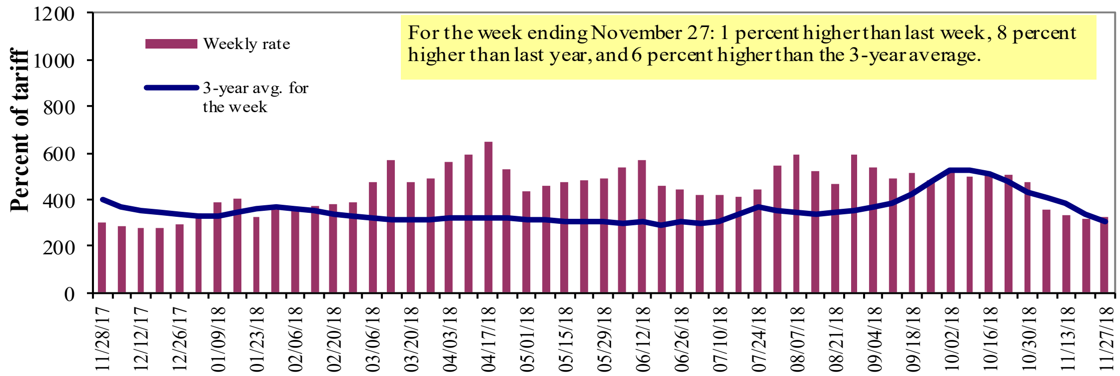


[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate[1,2]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
Source: Transportation & Marketing Program/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	11/27/2018	-	333	323	235	280	280	225
	11/20/2018	363	318	320	283	280	280	230
$/ton	11/27/2018	-	17.72	14.99	9.38	13.13	11.31	7.07
	11/20/2018	22.47	16.92	14.85	11.29	13.13	11.31	7.22
Current week % change from the same week:								
	Last year	-	10	8	16	-35	-27	24
	3-year avg. [2]	-	2	6	8	-7	-5	16
Rate[1]	December	-	-	325	235	280	280	220
	February	-	-	350	240	280	280	223

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]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.

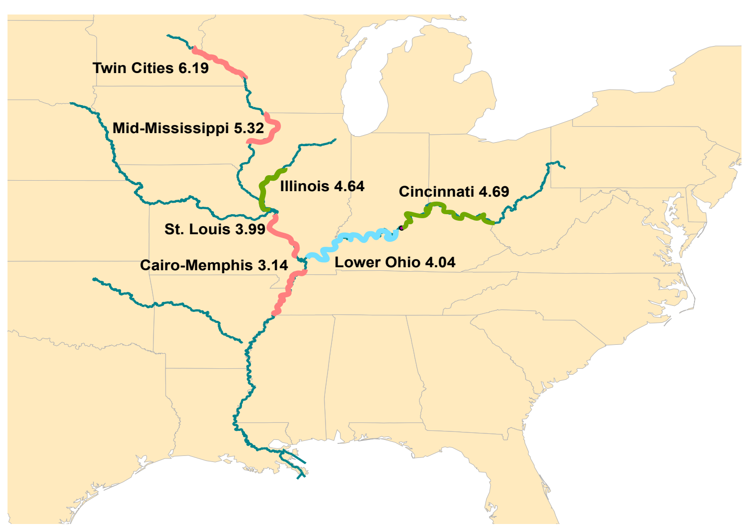
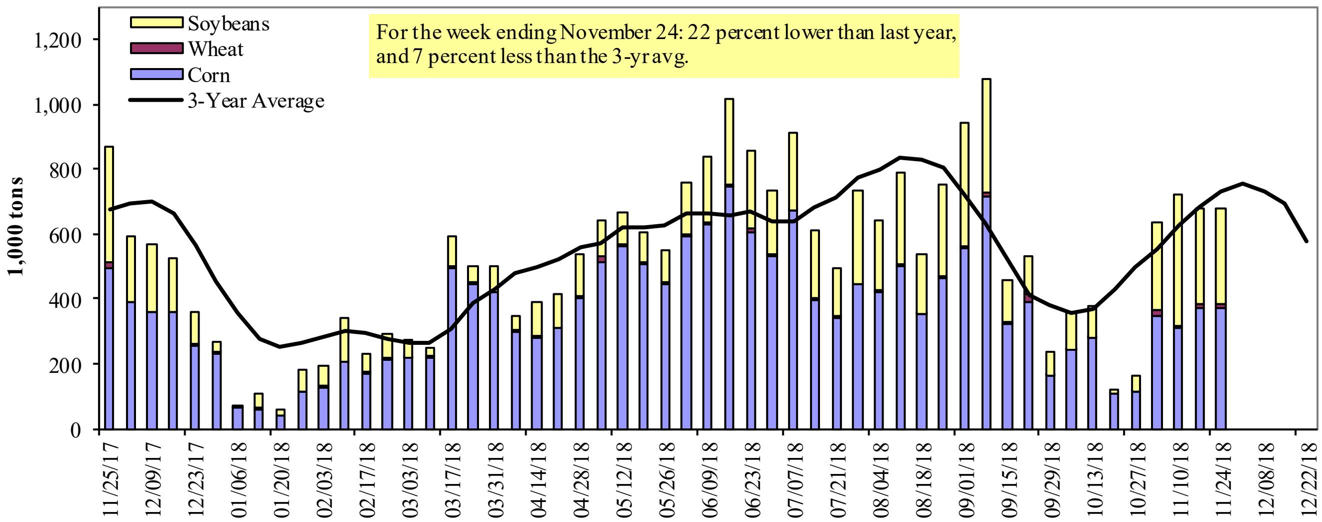


Figure 10

Barge Movements on the Mississippi River[1] (Locks 27 - Granite City, IL)



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 11/24/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	263	8	145	0	416
Winfield, MO (L25)	357	8	175	0	540
Alton, IL (L26)	446	19	236	0	701
Granite City, IL (L27)	414	17	226	0	657
Illinois River (L8)	61	16	41	0	118
Ohio River (OLMSTED)	99	6	106	0	211
Arkansas River (L1)	0	4	45	0	49
Weekly total - 2018	513	27	377	0	917
Weekly total - 2017	546	26	606	0	1,178
2018 YTD[1]	21,265	1,535	11,460	101	34,362
2017 YTD	20,424	2,109	14,526	300	37,359
2018 as % of 2017 YTD	104	73	79	34	92
Last 4 weeks as % of 2017[2]	102	149	71	10	84
Total 2017	22,242	2,210	16,123	360	40,936

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

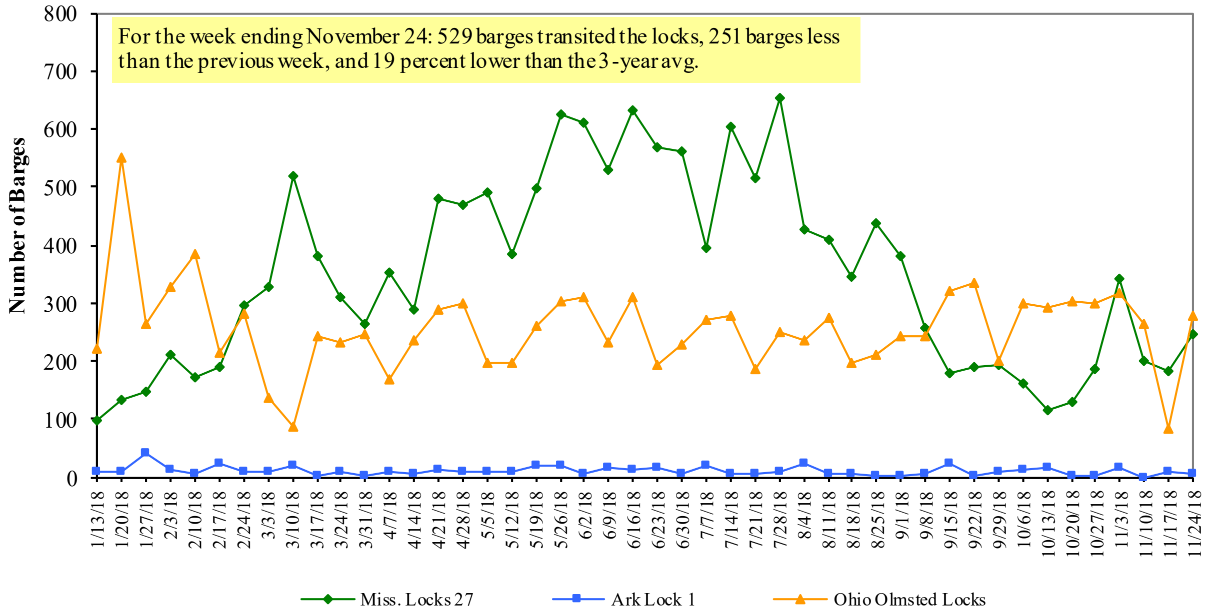
[2] As a percent of same period in 2017.

Note: 1. Total may not add exactly, due to rounding.
2. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

Source: U.S. Army Corps of Engineers

Figure 11

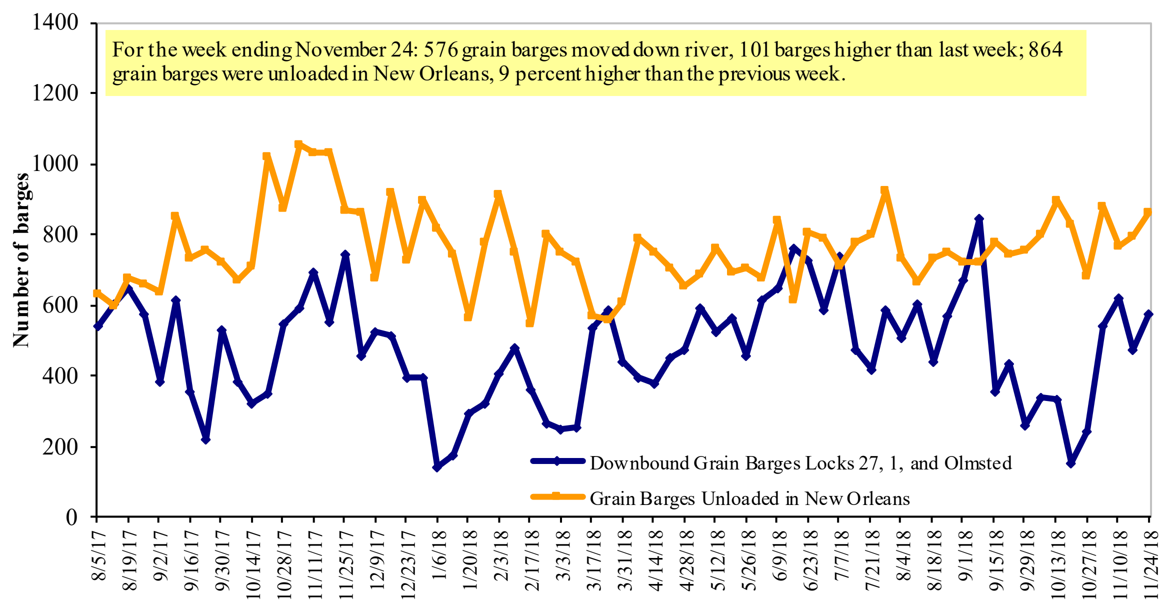
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 11/26/2018 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.277	-0.018	0.370
	New England	3.344	-0.003	0.463
	Central Atlantic	3.447	-0.019	0.373
	Lower Atlantic	3.145	-0.020	0.351
II	Midwest[2]	3.185	-0.031	0.301
III	Gulf Coast[3]	3.035	-0.010	0.323
IV	Rocky Mountain	3.339	-0.021	0.313
V	West Coast	3.739	-0.028	0.359
	West Coast less California	3.455	-0.020	0.342
	California	3.964	-0.036	0.367
Total	U.S.	3.261	-0.021	0.335

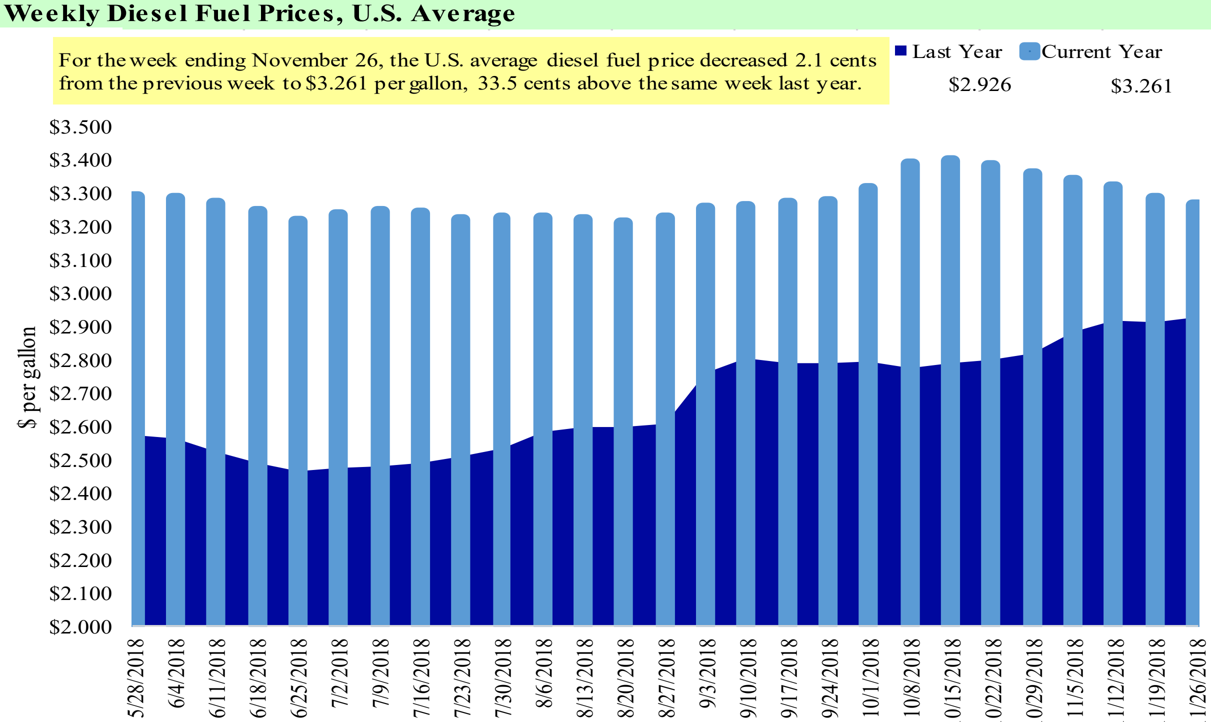
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]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 HRW	Wheat SRW	Wheat HRS	Wheat SWW	Wheat DUR	Wheat All wheat	Corn	Soybeans	Total
Export Balances[1]									
11/15/2018	1,370	709	1,806	1,127	156	5,167	11,755	11,737	28,659
This week year ago	2,047	516	1,696	1,360	59	5,678	14,581	14,564	34,823
Cumulative exports-marketing year[2]									
2018/19 YTD	2,773	1,081	2,872	2,377	244	9,347	12,549	10,892	32,788
2017/18 YTD	4,608	1,052	2,948	2,494	201	11,302	6,843	18,819	36,964
YTD 2018/19 as % of 2017/18	60	103	97	95	121	83	183	58	89
Last 4 wks as % of same period 2017/18	69	127	108	79	247	90	82	88	86
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

[1] Current unshipped (outstanding) export sales to date

[2] 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)

Table 13

Top 5 Importers[1] of U.S. Corn

For the week ending 11/15/2018	Total Commitments[2] 2018/19 Current MY	Total Commitments[2] 2017/18 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2015-2017
	- 1,000 mt -			
Mexico	8,072	8,569	(6)	13,691
Japan	4,288	3,450	24	11,247
Korea	1,811	810	124	4,754
Colombia	1,256	1,331	(6)	4,678
Peru	1,029	1,265	(19)	2,975
Top 5 Importers	**16,456**	**15,425**	**7**	**37,344**
Total US corn export sales	**24,304**	**21,424**	**13**	**53,184**
% of Projected	39%	35%		
Change from prior week[2]	**877**	**1,081**		
Top 5 importers' share of U.S. corn export sales	68%	72%		70%
USDA forecast, November 2018	**62,341**	**62,036**	**0**	
Corn Use for Ethanol USDA forecast, November 2018	**143,510**	**142,266**	**1**	

(n) indicates negative number.

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

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales.

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

Table 14

Top 5 Importers[1] of U.S. Soybeans

For the week ending 11/15/2018	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2015-2017
	- 1,000 mt -			- 1,000 mt -
China	648	18,647	(97)	31,228
Mexico	3,352	1,778	89	3,716
Indonesia	781	696	12	2,250
Japan	976	867	13	2,145
Netherlands	651	501	30	2,209
Top 5 importers	**6,408**	**22,489**	**(72)**	**41,549**
Total US soybean export sales	**22,629**	**33,383**	**(32)**	**55,113**
% of Projected	44%	58%		
Change from prior week[2]	**681**	**800**		
Top 5 importers' share of U.S. soybean export sales	28%	67%		**75%**
USDA forecast, November 2018	**51,771**	**58,011**	**89**	

(n) indicates negative number.

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

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. The total commitments change (net sales) from prior week could include reivisions from previous week's outstanding sales and/or accumulated sales

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers[1] of All U.S. Wheat

For the week ending 11/15/2018	Total Commitments[2] 2018/19 Current MY	2017/18 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2015-2017
	- 1,000 mt -			- 1,000 mt -
Mexico	1,745	2,060	(15)	2,781
Japan	1,797	1,868	(4)	2,649
Philippines	2,192	1,971	11	2,441
Korea	992	1,215	(18)	1,257
Nigeria	628	816	(23)	1,254
Indonesia	611	796	(23)	1,076
Taiwan	672	752	(11)	1,066
China	0	782	(100)	944
Colombia	373	203	84	714
Thailand	538	440	22	618
Top 10 importers	**9,546**	**10,902**	(12)	**14,800**
Total US wheat export sales	**14,514**	**16,980**	**(15)**	**22,869**
% of Projected	52%	69%		
Change from prior week[2]	**331**	**200**		
Top 10 importers' share of U.S. wheat export sales	66%	64%		65%
USDA forecast, November 2018	**27,929**	**24,550**	**14**	

(n) indicates negative number.

[1] Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.

[2] 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

[3] 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 11/22/18	Previous Week*	Current Week as % of Previous	2018 YTD*	2017 YTD*	2018 YTD as % of 2017 YTD	Last 4-weeks as % of: Last Year	Prior 3-yr. avg.	2017 Total*
Pacific Northwest									
Wheat	142	322	44	11,671	13,369	87	131	146	14,805
Corn	351	237	148	18,547	10,259	181	n/a	795	10,928
Soybeans	0	67	0	7,458	11,160	67	14	13	13,246
Total	**493**	**627**	**79**	**37,676**	**34,788**	**108**	**83**	**77**	**38,978**
Mississippi Gulf									
Wheat	84	33	253	3,541	3,972	89	125	119	4,198
Corn	549	461	119	31,135	26,900	116	163	151	28,690
Soybeans	891	816	109	24,698	28,493	87	67	66	32,911
Total	**1,524**	**1,311**	**116**	**59,374**	**59,366**	**100**	**88**	**85**	**65,800**
Texas Gulf									
Wheat	15	115	13	2,773	5,996	46	77	74	6,354
Corn	0	0	n/a	702	700	100	870	65	733
Soybeans	0	0	n/a	69	219	31	0	0	292
Total	**15**	**115**	**13**	**3,543**	**6,914**	**51**	**63**	**39**	**7,379**
Interior									
Wheat	10	37	28	1,453	1,563	93	169	106	1,727
Corn	198	128	154	8,049	8,052	100	93	113	8,758
Soybeans	75	147	51	6,173	4,950	125	92	96	5,508
Total	**283**	**312**	**91**	**15,675**	**14,565**	**108**	**95**	**105**	**15,993**
Great Lakes									
Wheat	15	29	52	742	596	124	487	126	711
Corn	0	0	n/a	404	189	214	0	0	192
Soybeans	77	83	93	1,096	793	138	156	107	890
Total	**92**	**112**	**82**	**2,241**	**1,578**	**142**	**167**	**102**	**1,793**
Atlantic									
Wheat	0	0	n/a	69	46	150	0	0	46
Corn	0	5	0	129	28	462	254	92	32
Soybeans	120	12	972	1,841	1,622	113	67	57	2,001
Total	**120**	**17**	**706**	**2,038**	**1,696**	**120**	**69**	**56**	**2,079**
U.S. total from ports*									
Wheat	266	536	50	20,249	25,541	79	121	117	27,841
Corn	1,098	831	132	58,965	46,127	128	202	185	49,333
Soybeans	1,163	1,126	103	41,334	47,238	88	55	52	54,847
Total	**2,526**	**2,493**	**101**	**120,548**	**118,906**	**101**	**87**	**82**	**132,021**

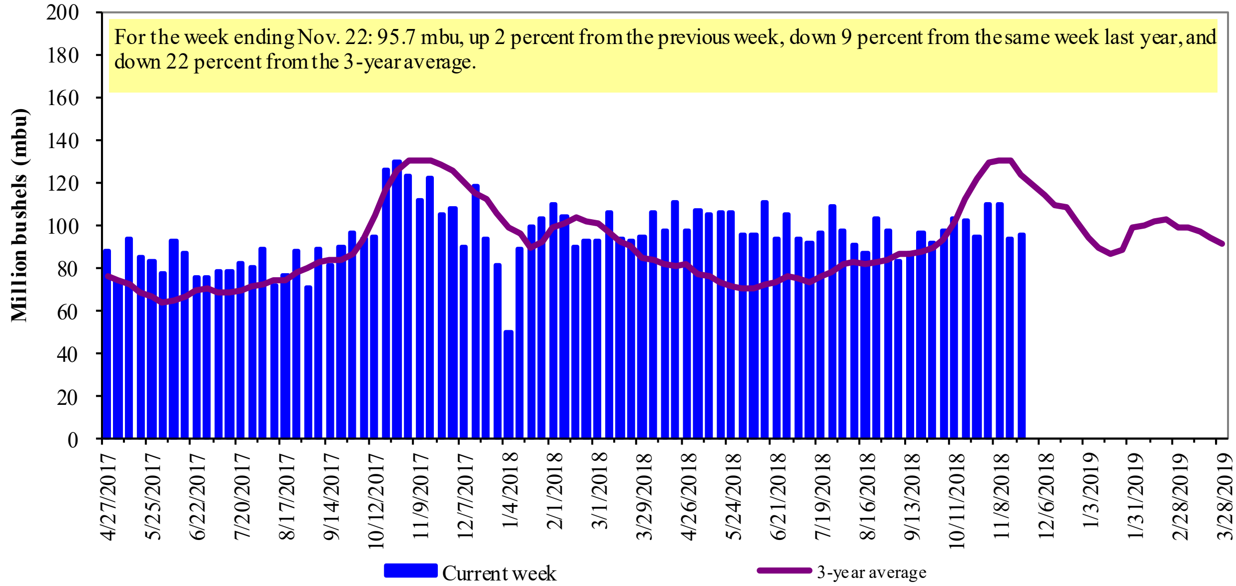
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

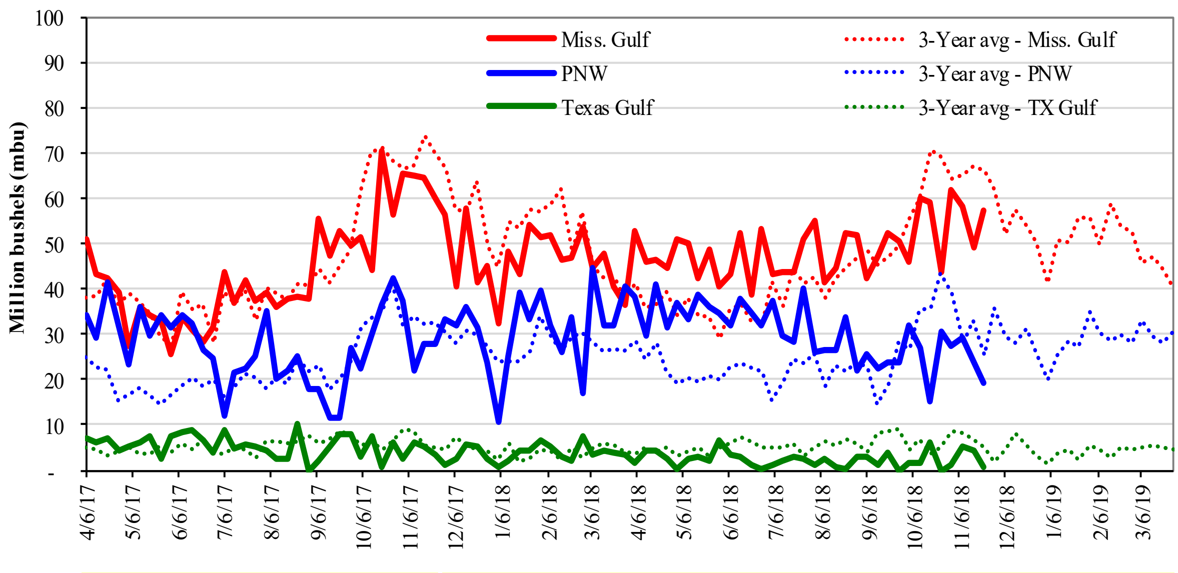
U.S. grain inspected for export (wheat, corn, and soybeans)



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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Week ending 11/22/18 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	57.4	Last Week:	up 16	down 87	up 8	down 19
PNW:	19.0	Last Year (same week):	down 4	down 83	down 9	down 31
Texas Gulf:	0.6	3-yr avg. (4-wk. mov. Avg):	down 13	down 92	down 20	down 39

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

Ocean Transportation

Table 17

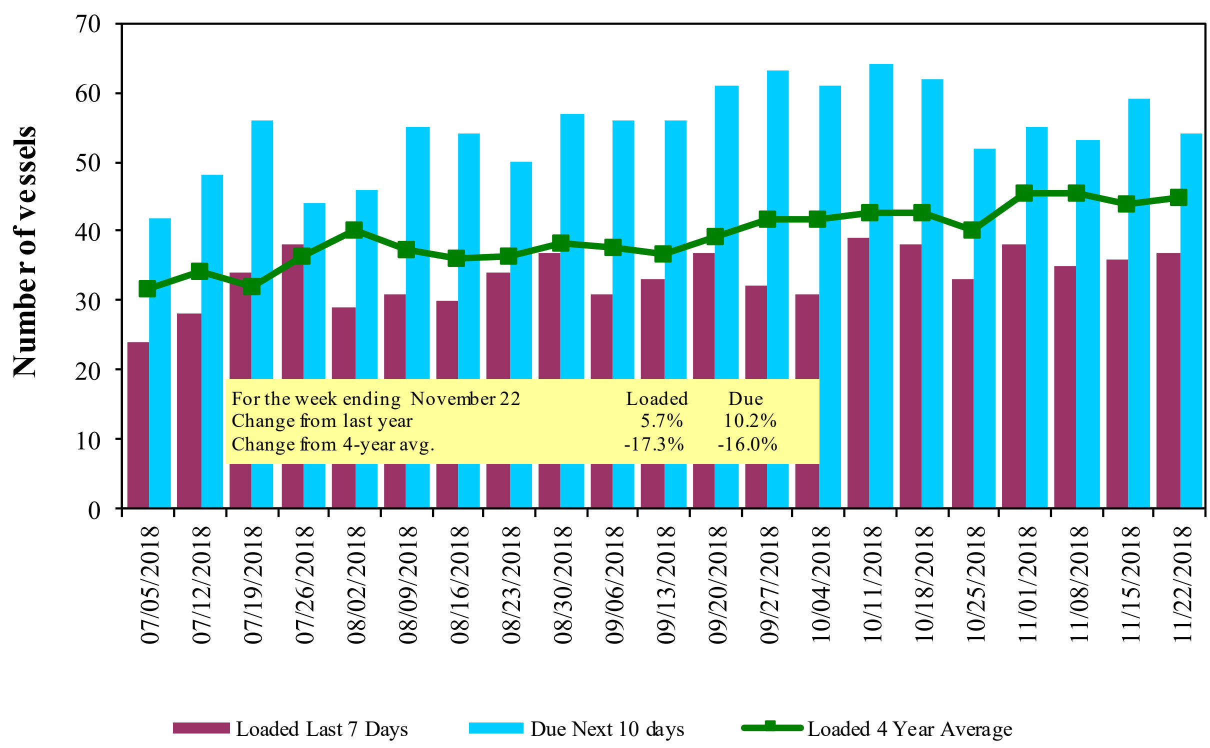
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
11/22/2018	35	37	54	n/a
11/15/2018	39	36	59	12
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf Vessel Loading Activity

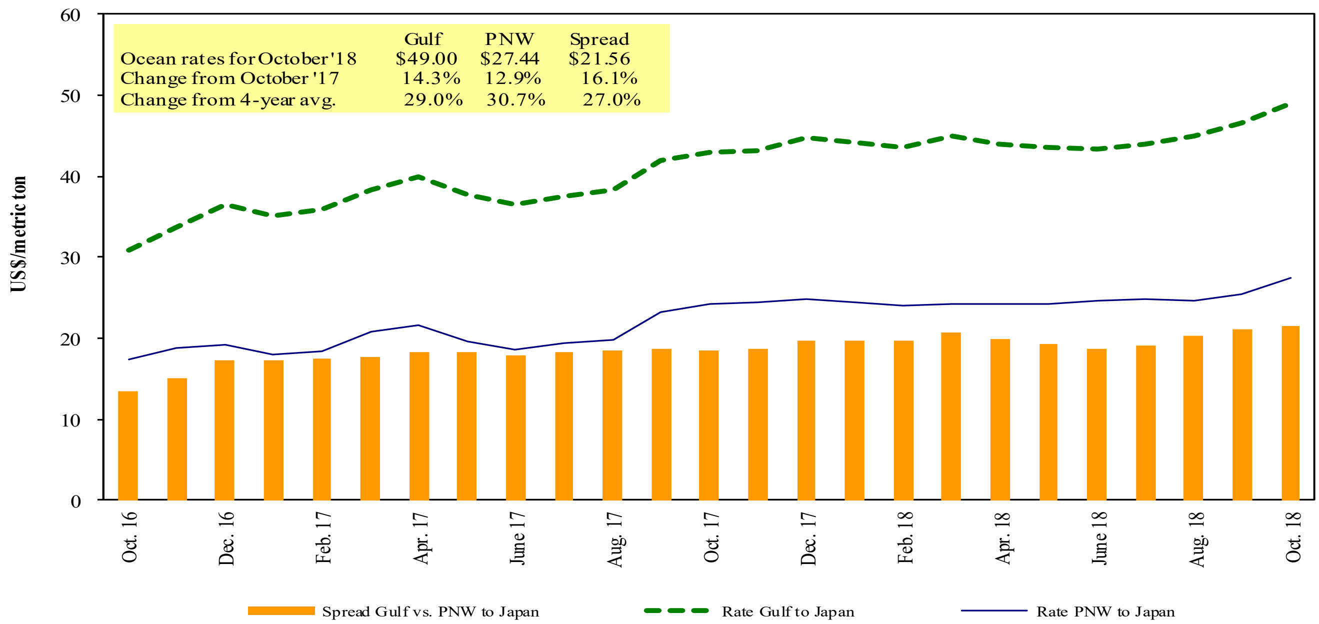


Source: Transportation & Marketing Program/AMS/USDA

[1]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 11/24/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Djibouti	Wheat	Dec 27/Jan 7	9,800	113.11*
U.S. Gulf	Pt. Sudan	Sorghum	Dec 7/17	30,430	71.88*
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	Dec 1/10	60,000	36.25
Brazil	China	Heavy Grain	Nov 20/30	60,000	38.00
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

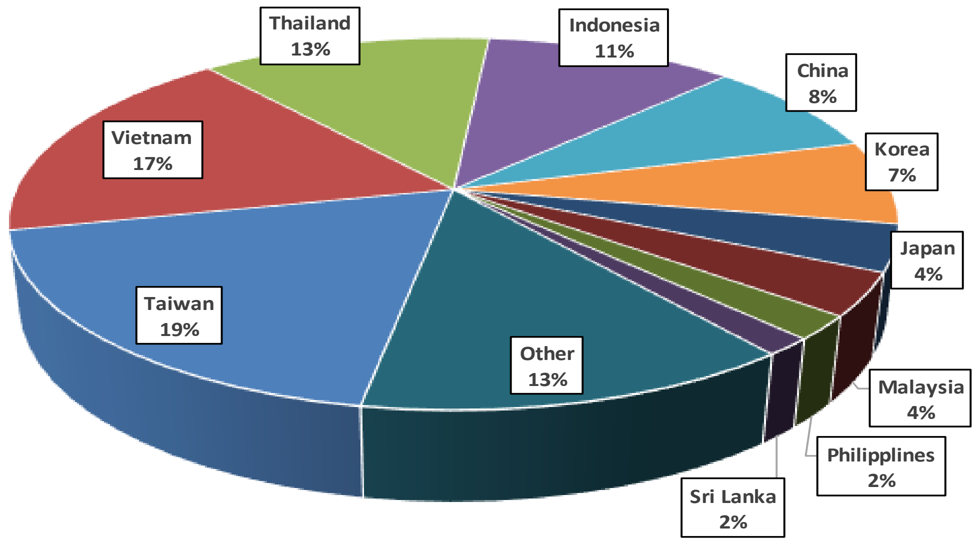
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

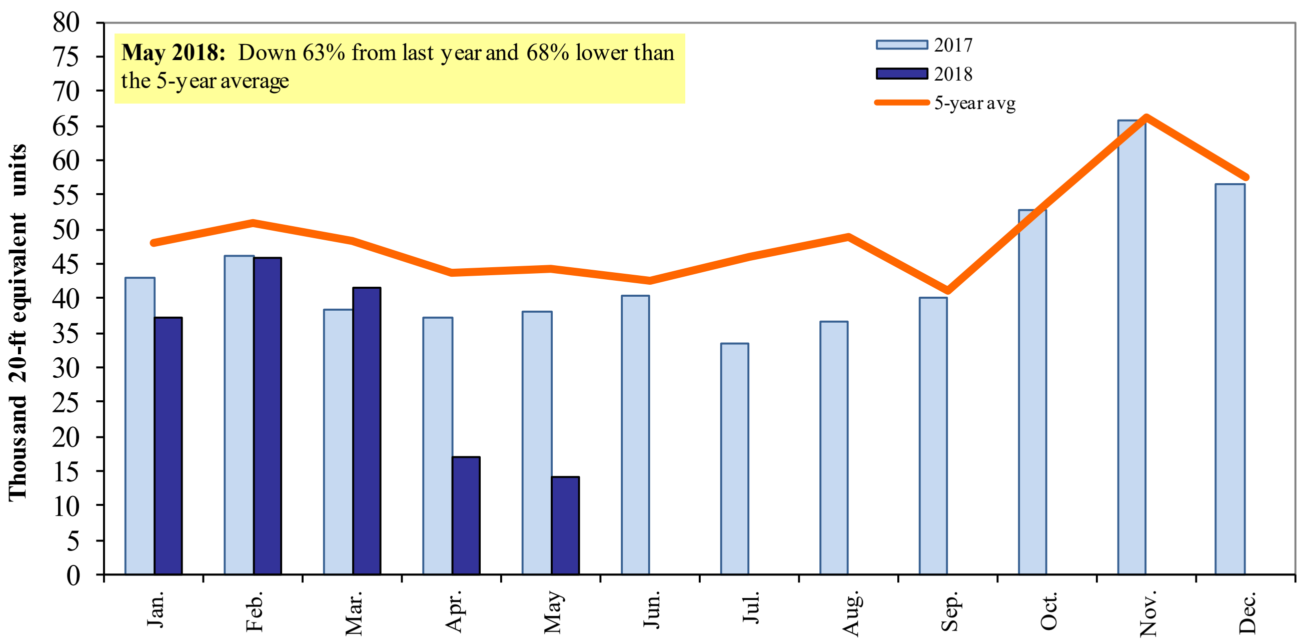


Service (PIERS) data

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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* November 29, 2018. Web: **http://dx.doi.org/10.9752/TS056.11-29-2018**