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U.S. DEPARTMENT OF AGRICULTURE

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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August 5, 2021

Contents

The next release is August 12, 2021

WEEKLY HIGHLIGHTS

South Dakota, Iowa, and Minnesota Temporarily Suspend HOS Regulations

Three State governors recently temporarily suspended the Federal Motor Carrier Safety Administration's (FMCSA) hours-of-service (HOS) regulations. On July 28, the Governor of Minnesota signed an executive order (EO) waiving HOS regulations, through August 27, to allow drivers of commercial motor vehicles more time to transport feed to farmers. Because of severe drought conditions in 14 Minnesota counties, State livestock producers face a scarcity of hay and other forage. Likewise, the Governor of South Dakota signed an EO, effective July 17-August 16, exempting delivery of gasoline, diesel, jet fuel, and ethanol from HOS regulations. This action was taken to meet the agriculture and tourism industries' fuel supply needs during a busy time. Finally, on July 29, the Governor of Iowa signed an emergency declaration, effective through August 28, suspending HOS regulations for crews and drivers delivering motor fuels, including gasoline, diesel No. 1 and No. 2, ethanol, and biodiesel. Also suspended in Iowa through August 28 are fees and permits for oversize and overweight vehicles transporting motor fuels, not exceeding 90,000 pounds. The Iowa declaration was in response to fuel supply complications, including high demand, long wait times at product terminals, as well as a shortage of drivers throughout Iowa.

I-40 Reopens for All Traffic After Nearly 3-Month Closure

Since August 2, the Interstate 40 (I-40) bridge linking Arkansas and Tennessee has reopened all lanes of traffic—east and westbound. The bridge had been closed since May 11 after a crack was discovered in the span. According to an Arkansas transportation official, the bridge's repairs, design, and inspection after the closure have cost an estimated $9.5 million, which will be split between Arkansas and Tennessee. Agricultural shippers rely on the I-40 bridge to move commodities across the Mississippi River. Of the 50,000 vehicles that typically cross the bridge daily, about one-quarter are commercial trucks.

Mississippi Gulf Grain Inspections Rebound, but Total Inspections Remain Unchanged

For the week ending July 29, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 1.96 million metric tons (mmt). Total grain inspections were unchanged from the previous week, up 6 percent from last year, and down 9 percent from the 3-year average. From the previous week, corn inspections increased 17 percent, while inspections of wheat and soybeans each decreased 25 percent, reflecting declines in shipments of soybeans to Mexico and wheat to Asia. Although overall inspections remained unchanged from the previous week, Mississippi Gulf grain inspections jumped 42 percent, led by higher wheat and corn inspections. Mississippi Gulf grain shipments increased to Asia and to Latin America. Inspections of grain in the Pacific Northwest (PNW) decreased 11 percent from the previous week.

Snapshots by Sector

Export Sales

For the week ending July 22, **unshipped balances** of wheat, corn, and soybeans totaled 15.7 mmt. This was 9 percent lower than last week and 16 percent lower than the same time last year. Net **corn export sales** were −0.115 mmt, up 30 percent from the past week. Net **soybean export sales** were −0.079 mmt, significantly down from the previous week. Net weekly **wheat export sales** were 0.515 mmt, up 9 percent from last week.

Rail

U.S. Class I railroads originated 20,763 **grain carloads** during the week ending July 24. This was a 1-percent decrease from the previous week, 2 percent more than last year, and 6 percent lower than the 3-year average.

Average August shuttle **secondary railcar** bids/offers (per car) were $57 above tariff for the week ending July 29. This was $174 more than last week and $499 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending July 31, **barged grain movements** totaled 651,006 tons. This was 27 percent higher than the previous week and 22 percent less than the same period last year.

For the week ending July 31, 457 grain barges **moved down river**—135 more barges than the previous week. There were 650 grain barges **unloaded in New Orleans**, 7 percent fewer than the previous week.

Ocean

For the week ending July 29, 36 **oceangoing grain vessels** were loaded in the Gulf—44 percent more than the same period last year. Within the next 10 days (starting July 30), 52 vessels were expected to be loaded—49 percent more than the same period last year.

As of July 29, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $81.00. This was unchanged from the previous week. The rate from PNW to Japan was $43.00 per mt, 2 percent less than the previous week.

Fuel

For the week ending August 2, the U.S. average **diesel fuel price** increased 2.5 cents from the previous week to $3.367 per gallon, 94.3 cents above the same week last year. Apart from the previous week (which showed a .2-cent decline), national diesel prices have risen every week for the last 15 weeks.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 5, 2021.
Web: **http://dx.doi.org/10.9752/TS056.08-05-2021**

Feature Article/Calendar

Second-Quarter 2021 Wheat Transportation and Landed Costs Rise

Second-quarter 2021 wheat transportation costs to Japan increased from first quarter 2021 (quarter to quarter) and from second quarter 2020 (year to year). These increases held true for all four routes tracked—i.e., from Kansas (KS) and North Dakota (ND) origins, via both the Pacific Northwest and the U.S. Gulf. Both quarter to quarter and year to year, landed costs (farm value plus transportation costs) also increased for all routes.

Transportation costs. Quarter to quarter, PNW-route wheat transportation costs to Japan increased 10 percent from the Kansas origin and rose 12 percent from North Dakota. Year to year, these costs rose 26 percent from Kansas and rose 25 percent from North Dakota. Quarter to quarter, U.S. Gulf-route wheat transportation costs to Japan increased 13 percent from Kansas and rose 11 percent from North Dakota. Year to year, these costs rose 37 percent from Kansas and rose 31 percent from North Dakota, mainly because of significantly higher truck and ocean freight rates.

Total landed costs. Both quarter-to-quarter and year-to-year, increases in total landed costs were due to higher transportation costs and higher farm values for all routes (tables 1 and 2). Year-to-year rises in transportation costs, in particular, reflected rising trucking and ocean freight rates.

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

	Kansas					North Dakota				
Mode	2020 2nd qtr	2021 1st qtr	2021 2nd qtr	Year-to-year change	Quarterly change	2020 2nd qtr	2021 1st qtr	2021 2nd qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	9.70	13.66	13.99	44.23	2.42	9.70	13.66	13.99	44.23	2.42
Rail[1]	62.83	61.24	62.77	-0.10	2.50	60.78	56.37	59.54	-2.04	5.62
Ocean vessel	18.94	29.85	38.34	102.43	28.44	18.94	29.85	38.34	102.43	28.44
Transportation costs	91.47	104.75	115.10	25.83	9.88	89.42	99.88	111.87	25.11	12.00
Farm value[2]	162.65	215.20	227.44	39.83	5.69	169.02	205.27	237.49	40.51	15.70
Total landed cost	254.12	319.95	342.54	34.79	7.06	258.44	305.15	349.36	35.18	14.49
Transport % of landed cost	35.99	32.74	33.60			34.60	32.73	32.02		

Table 2: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the U.S. Gulf

	Kansas					North Dakota				
Mode	2020 2nd qtr	2021 1st qtr	2021 2nd qtr	Year-to-year change	Quarterly change	2020 2nd qtr	2021 1st qtr	2021 2nd qtr	Year-to-year change	Quarterly change
	$/metric ton			%	%	$/metric ton			%	%
Truck	9.70	13.66	13.99	44.23	2.42	9.70	13.66	13.99	44.23	2.42
Rail[1]	43.31	42.07	42.07	-2.86	0.00	60.78	59.54	59.54	-2.04	0.00
Ocean vessel	36.33	52.19	65.94	81.50	26.35	36.33	52.19	65.94	81.50	26.35
Transportation costs	89.34	107.92	122.00	36.56	13.05	106.81	125.39	139.47	30.58	11.23
Farm value[2]	162.65	215.20	227.44	39.83	5.69	169.02	205.27	237.49	40.51	15.70
Total landed cost	251.99	323.12	349.44	38.67	8.15	275.83	330.66	376.96	36.66	14.00
Transport % of landed cost	35.45	33.40	34.91			38.72	37.92	37.00		

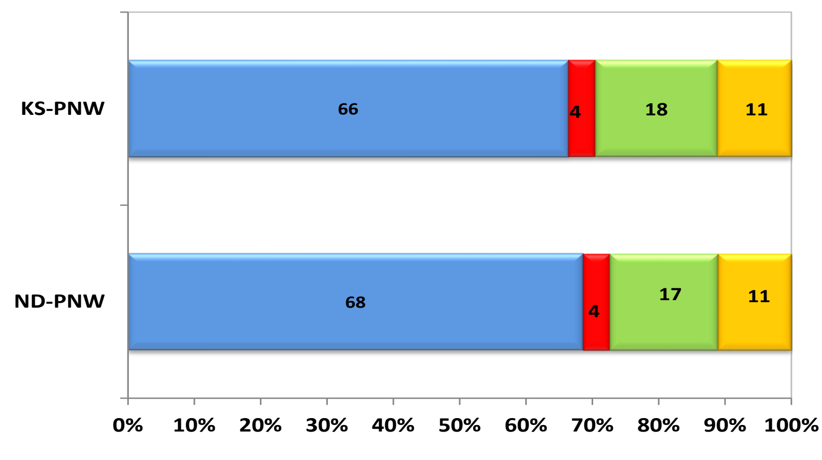
[1] Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

[2] USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter).
Note: PNW = Pacific Northwest; qtr = quarter
Source: USDA, Agricultural Marketing Service.

PNW-route landed costs. In second quarter 2021, total PNW landed costs were $343/metric ton (mt) from Kansas and $349/mt from North Dakota (table 1). Second-quarter farm values were 64 percent of the PNW-route landed costs for shipping from Kansas and 68 percent from North Dakota. Year to year, these shares rose for both Kansas and North Dakota.

PNW ocean freight rates for shipping wheat rose 28 percent quarter to quarter and 102 percent year to year. The increases were the result of stronger demand for grain and iron ore and because of global optimism about world economies reopening (*Grain Transportation Report* (GTR), July 22). Quarter to quarter, rail rates for shipping wheat via the PNW route were up 3 percent for Kansas and up 6 percent for North Dakota. Year to year, however, rail rates were unchanged for Kansas and down 2 percent for North Dakota. Quarter to quarter, trucking rates increased a modest 2 percent, but year to year, jumped

Figure 1. Landed costs for shipping wheat (Pacific Northwest) to Japan, second quarter 2021



Note: PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.

Source: USDA, Agricultural Marketing Service.

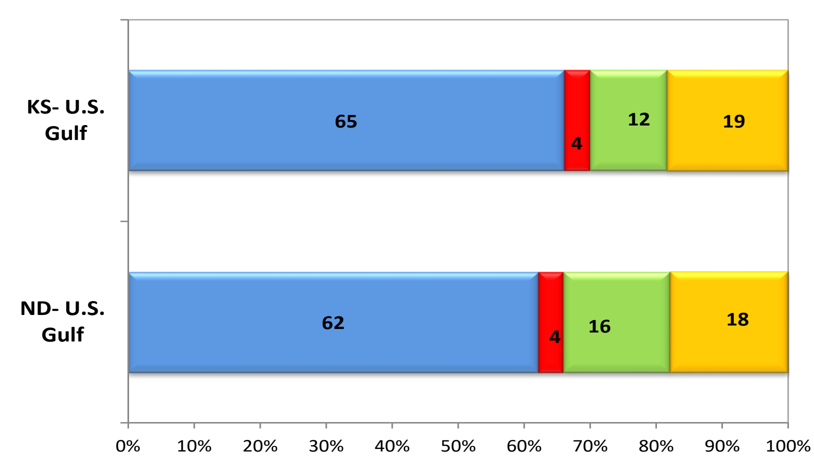
44 percent, reflecting the surge in fuel prices and increase in the overall demand for grain. Second-quarter PNW-route transportation costs represented 33 percent of total landed costs, equal to the previous quarter's, but below those of last year (table 1).

U.S. Gulf-route landed costs. Total Gulf-route landed costs were $349/mt from Kansas and $377/mt from North Dakota. Second-quarter 2020 farm values represented 65 percent of Gulf-route landed costs from Kansas and 62 percent from North Dakota. Year to year, the farm value share of landed costs was unchanged for Kansas, but down slightly for North Dakota (fig. 2 and table 2).

U.S. Gulf-route ocean rates increased 26 percent from quarter to quarter and rose 82 percent from year to year. Unchanged quarter to quarter, U.S. Gulf-route rail rates decreased year to year—3 percent from Kansas and 2 percent from North Dakota. Rail's share of the landed costs rose slightly, both quarter to quarter and year to year. Second-quarter 2021 Gulf-route transportation costs from Kansas were 34 percent of the total landed costs—this share was down quarter to quarter and year to year (see table 2). Gulf-route transportation costs from North Dakota were 38 percent of the total landed costs, which was unchanged quarter to quarter but down year to year.

Second-quarter 2021 wheat inspections. According to USDA's Federal Grain Inspection Service, second-quarter 2021 wheat inspected for export to Japan totaled .510 million metric tons (mmt), down 19 percent from quarter to quarter and down 25 percent from year to year. Of total U.S. second-quarter 2021 wheat exports (7.9 mmt), Japan's share accounted for only 6 percent. Year to year, total wheat exports decreased 5 percent (*GTR, July 29*). According to USDA's July *World Agricultural Supply and Demand Estimates*, the estimate of total U.S. wheat exports for marketing year (MY) 2021/22—23.84 mmt—was revised down 3 percent from the June projection. This total is 12 percent below the estimate for MY 2020/21.
Johnny.Hill@usda.gov

Figure 2. Landed costs for shipping wheat (U.S. Gulf) to Japan, second quarter 2021



Note: KS = Kansas; ND = North Dakota.

Source: USDA, Agricultural Marketing Service.

Grain Transportation Indicators

Table 1
Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
08/04/21	226	290	225	187	362	305
07/28/21	224	292	218	156	362	312

[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); ocean = routes to Japan ($/metric ton);
n/a = not available.
Source: USDA, Agricultural Marketing Service.

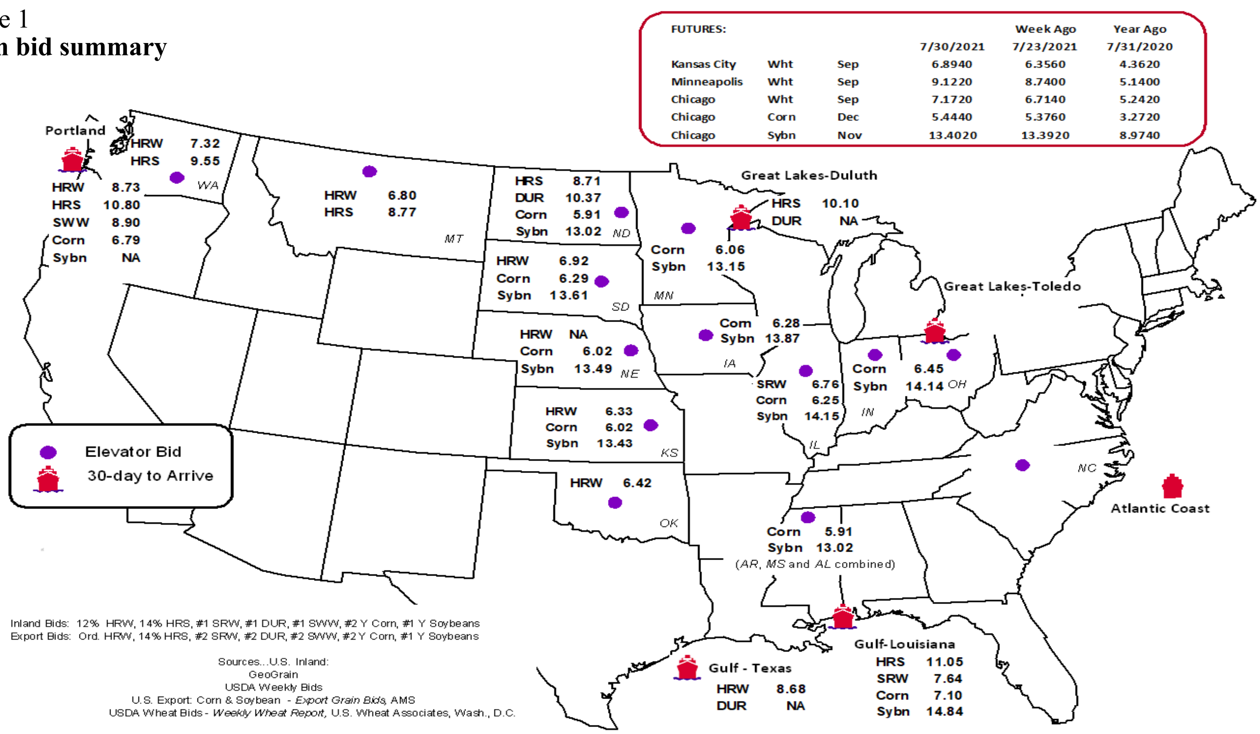
Table 2
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	7/30/2021	7/23/2021
Corn	IL–Gulf	-0.85	-0.81
Corn	NE–Gulf	-1.08	-1.01
Soybean	IA–Gulf	-0.97	-0.68
HRW	KS–Gulf	-2.35	-2.40
HRS	ND–Portland	-2.09	-2.13

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
Source: USDA, Agricultural Marketing Service.

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]
7/28/2021[p]	93	581	2,106	0	2,780	7/24/2021	2,852
7/21/2021[r]	5	865	4,012	0	4,882	7/17/2021	2,360
2021 YTD[r]	35,198	42,429	177,244	9,887	264,758	2021 YTD	82,590
2020 YTD[r]	12,294	25,688	138,062	5,802	181,846	2020 YTD	73,297
2021 YTD as % of 2020 YTD	286	165	128	170	146	% change YTD	113
Last 4 weeks as % of 2020[2]	14	97	78	0	74	Last 4wks. % 2020	86
Last 4 weeks as % of 4-year avg.[2]	13	97	66	0	63	Last 4wks. % 4 yr.	93
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	126,407
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622

[1]Data is incomplete as it is voluntarily provided.

[2] Compared with same 4-weeks in 2020 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 Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

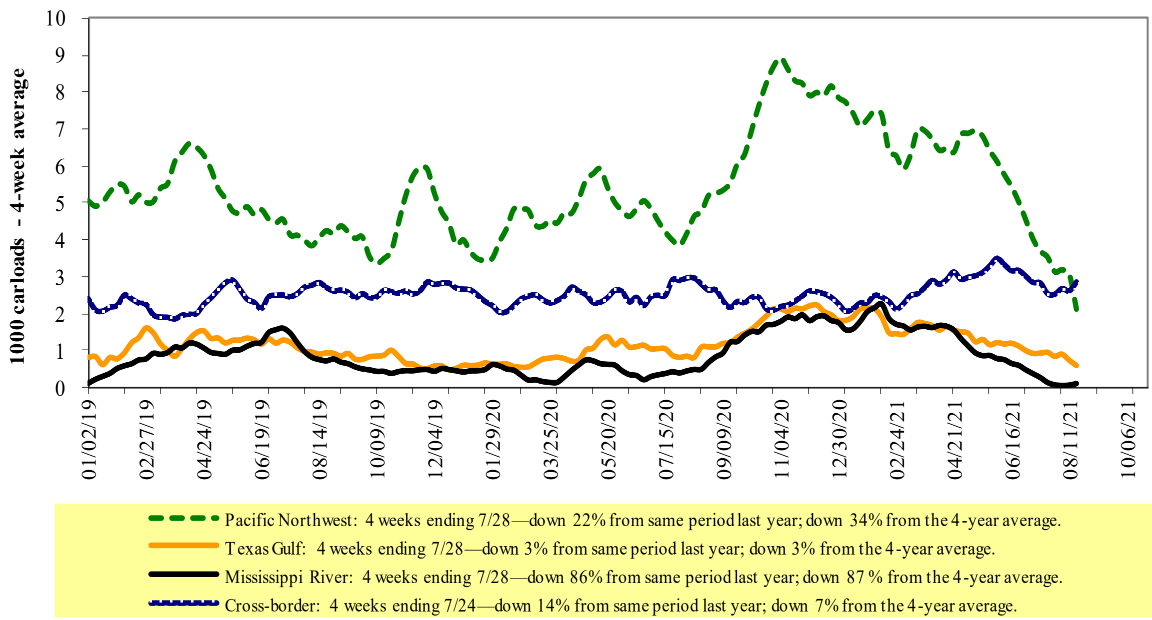
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

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: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending:	East		West			U.S. total	Canada	
7/24/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,565	2,927	9,610	1,258	5,403	20,763	2,426	4,891
This week last year	1,745	2,449	9,827	1,075	5,341	20,437	4,659	5,310
2021 YTD	54,855	74,662	355,690	32,282	183,341	700,830	125,490	149,459
2020 YTD	49,164	70,520	319,146	31,093	150,171	620,094	120,589	135,301
2021 YTD as % of 2020 YTD	112	106	111	104	122	113	104	110
Last 4 weeks as % of 2020*	105	97	91	102	98	95	55	80
Last 4 weeks as % of 3-yr. avg.**	89	89	81	96	99	88	61	84
Total 2020	91,659	130,216	613,630	57,782	296,701	1,189,988	238,491	261,778

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

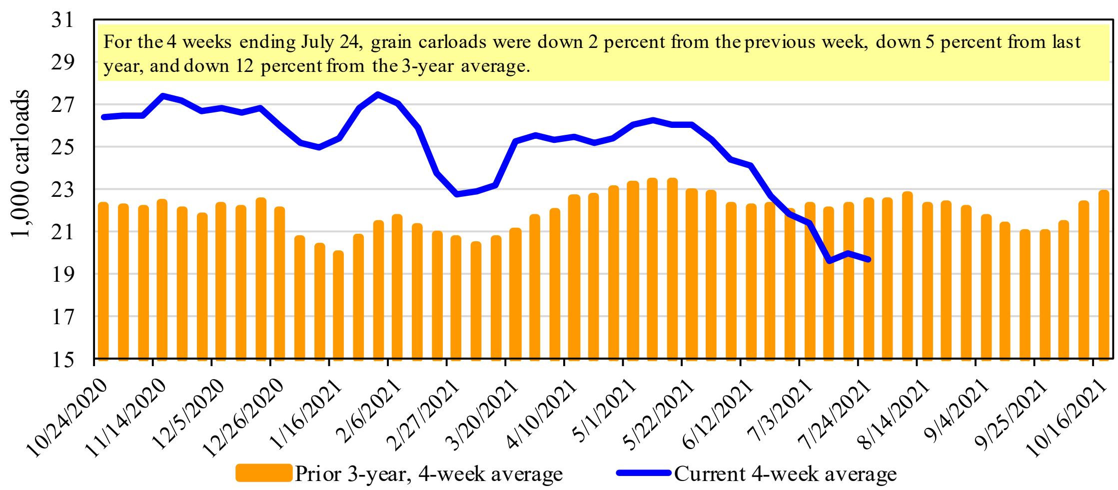
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 5

Railcar auction offerings[1] ($/car)[2]

For the week ending: 7/29/2021		Aug-21	Aug-20	Sep-21	Sep-20	Oct-21	Oct-20	Nov-21	Nov-20
		Delivery period							
BNSF[3]	COT grain units	0	73	0	0	0	0	0	0
	COT grain single-car	0	0	0	125	0	104	0	22
UP[4]	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	27	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. n/a = not available.

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

[4]UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

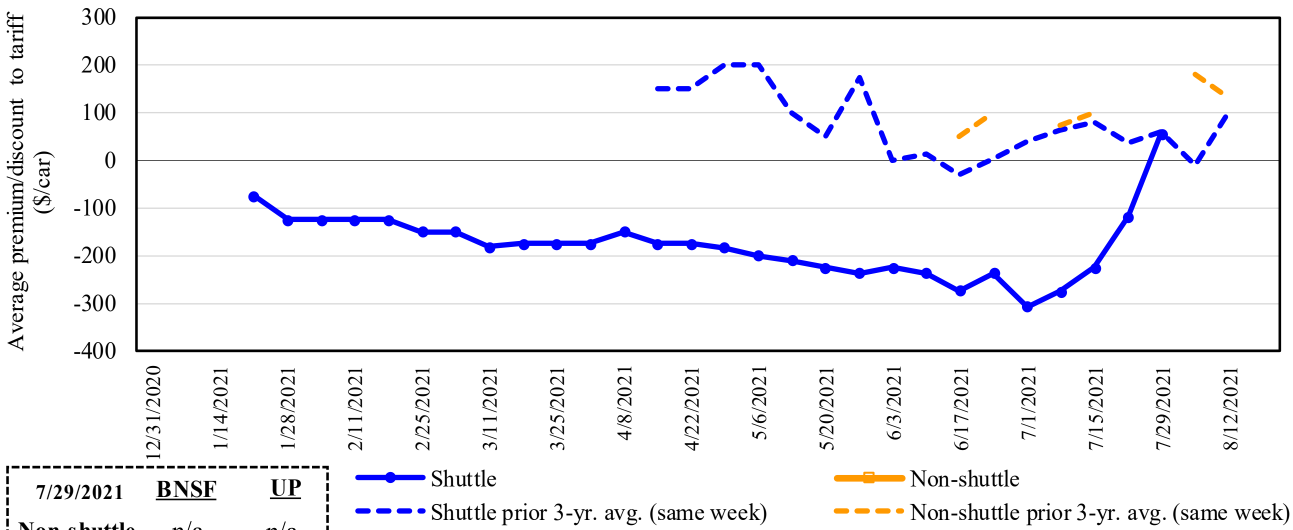
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

Figure 4
Bids/offers for railcars to be delivered in August 2021, secondary market

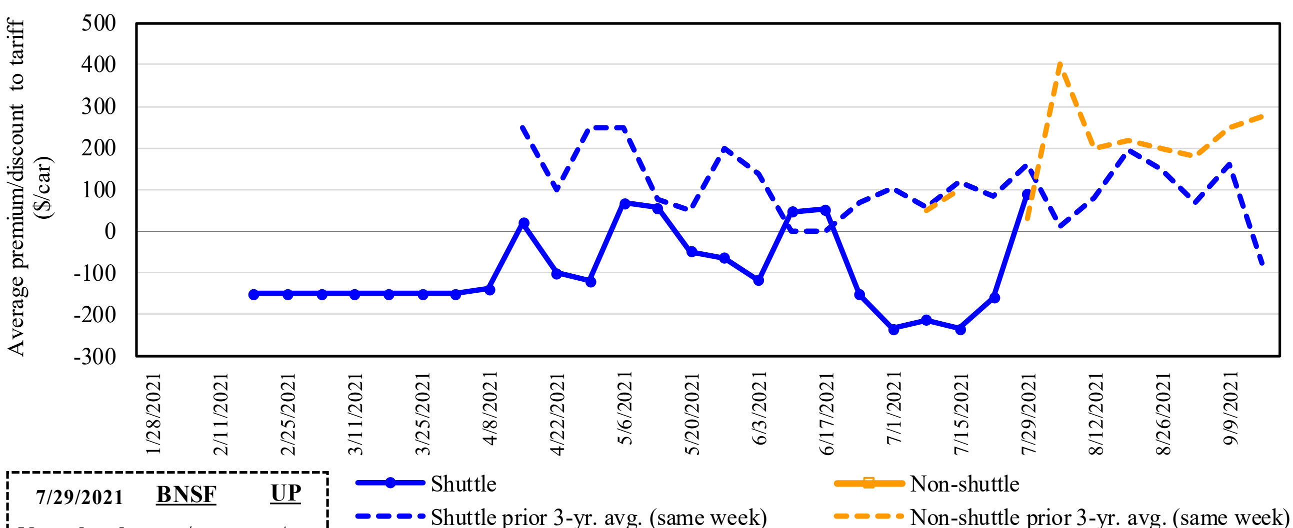


7/29/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	-$234	$348

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $174 this week and are at the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Figure 5
Bids/offers for railcars to be delivered in September 2021, secondary market



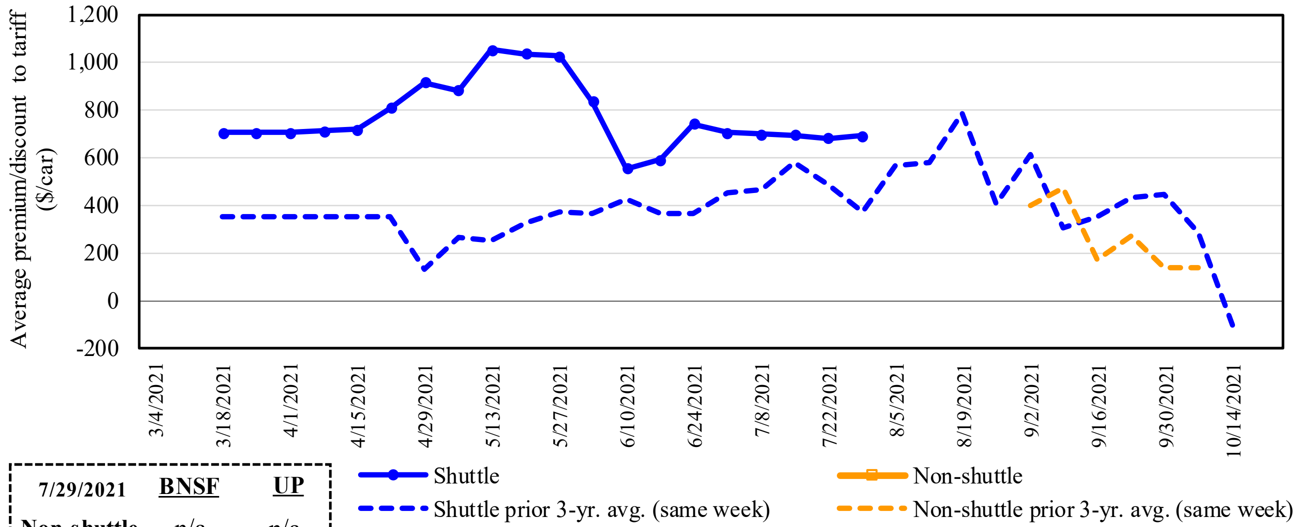
7/29/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$150	$31

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $249 this week and are at the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Figure 6

Bids/offers for railcars to be delivered in October 2021, secondary market



7/29/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$663	$722

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $12 this week and are $362 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Table 6

Weekly secondary railcar market ($/car)[1]

For the week ending: 7/29/2021		Delivery period					
		Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(234)**	**150**	**663**	**n/a**	**n/a**	**150**
	Change from last week	(6)	367	(38)	n/a	n/a	n/a
	Change from same week 2020	(922)	(600)	(238)	n/a	n/a	n/a
	UP-Pool	**348**	**31**	**722**	**n/a**	**n/a**	**n/a**
	Change from last week	354	131	61	n/a	n/a	n/a
	Change from same week 2020	(77)	(331)	(103)	n/a	n/a	n/a

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

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

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

Table 7

Tariff rail rates for unit and shuttle train shipments[1]

August 2021	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	$3,695	$121	$37.90	$1.03	5
	Grand Forks, ND	Duluth-Superior, MN	$3,658	$0	$36.33	$0.99	-13
	Wichita, KS	Los Angeles, CA	$7,115	$0	$70.66	$1.92	0
	Wichita, KS	New Orleans, LA	$4,525	$214	$47.06	$1.28	3
	Sioux Falls, SD	Galveston-Houston, TX	$6,851	$0	$68.03	$1.85	0
	Colby, KS	Galveston-Houston, TX	$4,801	$234	$50.00	$1.36	3
	Amarillo, TX	Los Angeles, CA	$5,121	$326	$54.09	$1.47	4
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,900	$241	$41.13	$1.04	4
	Toledo, OH	Raleigh, NC	$7,833	$0	$77.79	$1.98	15
	Des Moines, IA	Davenport, IA	$2,455	$51	$24.89	$0.63	3
	Indianapolis, IN	Atlanta, GA	$5,979	$0	$59.37	$1.51	3
	Indianapolis, IN	Knoxville, TN	$5,040	$0	$50.05	$1.27	3
	Des Moines, IA	Little Rock, AR	$3,900	$150	$40.22	$1.02	5
	Des Moines, IA	Los Angeles, CA	$5,780	$438	$61.74	$1.57	7
Soybeans	Minneapolis, MN	New Orleans, LA	$3,631	$256	$38.60	$1.05	6
	Toledo, OH	Huntsville, AL	$6,595	$0	$65.49	$1.78	17
	Indianapolis, IN	Raleigh, NC	$7,125	$0	$70.75	$1.93	3
	Indianapolis, IN	Huntsville, AL	$5,247	$0	$52.11	$1.42	3
	Champaign-Urbana, IL	New Orleans, LA	$4,645	$241	$48.52	$1.32	4
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	$4,193	$0	$41.64	$1.13	4
	Wichita, KS	Galveston-Houston, TX	$4,236	$0	$42.07	$1.14	0
	Chicago, IL	Albany, NY	$6,376	$0	$63.32	$1.72	-10
	Grand Forks, ND	Portland, OR	$5,851	$0	$58.10	$1.58	3
	Grand Forks, ND	Galveston-Houston, TX	$5,721	$0	$56.81	$1.55	-5
	Colby, KS	Portland, OR	$6,012	$384	$63.51	$1.73	4
Corn	Minneapolis, MN	Portland, OR	$5,180	$0	$51.44	$1.31	0
	Sioux Falls, SD	Tacoma, WA	$5,140	$0	$51.04	$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	$3,820	$241	$40.33	$1.02	4
	Lincoln, NE	Galveston-Houston, TX	$3,880	$0	$38.53	$0.98	0
	Des Moines, IA	Amarillo, TX	$4,320	$189	$44.78	$1.14	5
	Minneapolis, MN	Tacoma, WA	$5,180	$0	$51.44	$1.31	0
	Council Bluffs, IA	Stockton, CA	$5,100	$0	$50.65	$1.29	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,850	$0	$58.09	$1.58	0
	Minneapolis, MN	Portland, OR	$5,900	$0	$58.59	$1.59	0
	Fargo, ND	Tacoma, WA	$5,750	$0	$57.10	$1.55	0
	Council Bluffs, IA	New Orleans, LA	$4,875	$278	$51.18	$1.39	4
	Toledo, OH	Huntsville, AL	$4,945	$0	$49.11	$1.34	3
	Grand Island, NE	Portland, OR	$5,260	$393	$56.14	$1.53	5

[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 pounds per bushel (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 (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8

Tariff rail rates for U.S. bulk grain shipments to Mexico

Date: August 2021				Fuel	Tariff rate plus		Percent
	Origin		Tariff rate	surcharge	fuel surcharge per:		change[4]
Commodity	state	Destination region	per car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y
Wheat	MT	Chihuahua, CI	$7,699	$0	$78.67	$2.14	4
	OK	Cuautitlan, EM	$6,813	$167	$71.32	$1.94	3
	KS	Guadalajara, JA	$7,531	$681	$83.91	$2.28	3
	TX	Salinas Victoria, NL	$4,347	$102	$45.46	$1.24	2
Corn	IA	Guadalajara, JA	$8,902	$592	$97.00	$2.46	2
	SD	Celaya, GJ	$8,140	$0	$83.17	$2.11	0
	NE	Queretaro, QA	$8,300	$351	$88.39	$2.24	3
	SD	Salinas Victoria, NL	$6,905	$0	$70.55	$1.79	0
	MO	Tlalnepantla, EM	$7,665	$342	$81.81	$2.08	4
	SD	Torreon, CU	$7,690	$0	$78.57	$1.99	0
Soybeans	MO	Bojay (Tula), HG	$8,547	$555	$92.99	$2.53	2
	NE	Guadalajara, JA	$9,157	$582	$99.50	$2.71	2
	IA	El Castillo, JA	$9,410	$0	$96.15	$2.61	-1
	KS	Torreon, CU	$8,014	$406	$86.03	$2.34	3
Sorghum	NE	Celaya, GJ	$7,772	$527	$84.79	$2.15	3
	KS	Queretaro, QA	$8,108	$209	$84.97	$2.16	2
	NE	Salinas Victoria, NL	$6,713	$168	$70.30	$1.78	2
	NE	Torreon, CU	$7,092	$374	$76.28	$1.94	2

[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.

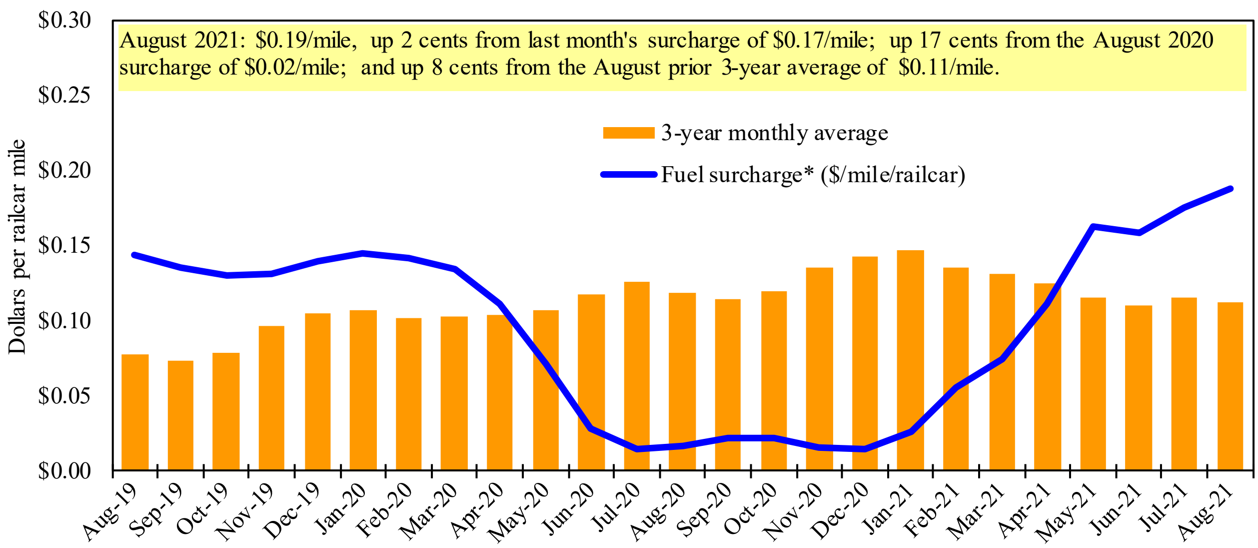
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

[4]Percentage change calculated using tariff rate plus fuel surchage; Y/Y = year over year.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

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.

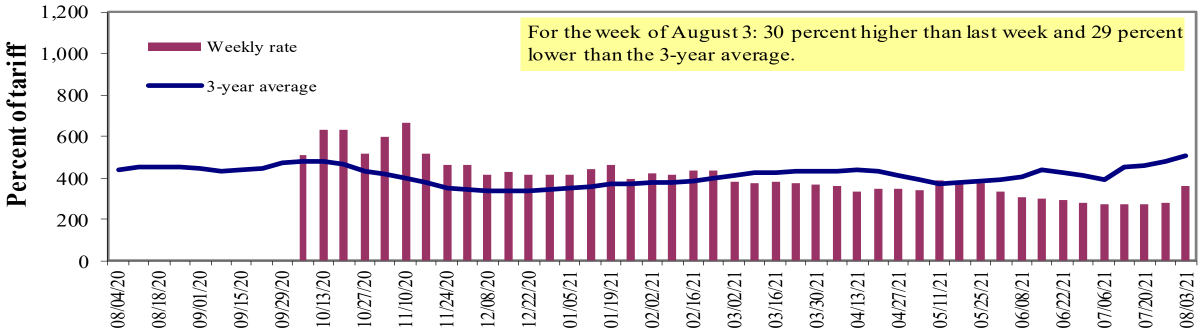
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

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

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 8
Illinois River barge freight rate[1,2,3]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
[3]No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.
The 3-yr avg counts the avearge of MY2018 and MY2019. MY2020 data is not available. *Source: USDA, Agricultural Marketing Service.

Table 9
Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	8/3/2021	405	355	337	256	252	252	250
	7/27/2021	352	281	280	202	209	209	191
$/ton	8/3/2021	25.07	18.89	15.64	10.21	11.82	10.18	7.85
	7/27/2021	21.79	14.95	12.99	8.06	9.80	8.44	6.00
Current week % change from the same week:								
	Last year	-11	-2	-	7	-21	-21	9
	3-year avg. [2]	-18	-24	-34	-24	-20	-21	-14
Rate[1]	September	504	464	455	405	448	448	397
	November	517	456	436	328	404	404	310

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; "-" not available due to lock closure.
ILL River 3-year avg. is the 4-week moving average of MY18 and MY19. Data for MY20 is unavailable. Source: USDA, Agricultural Marketing Service.

Figure 9
Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

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

Map Credit: USDA, Agricultural Marketing Service

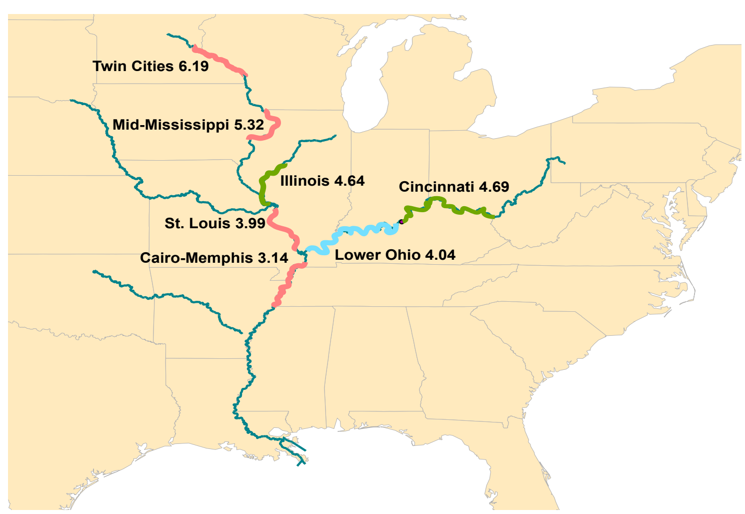
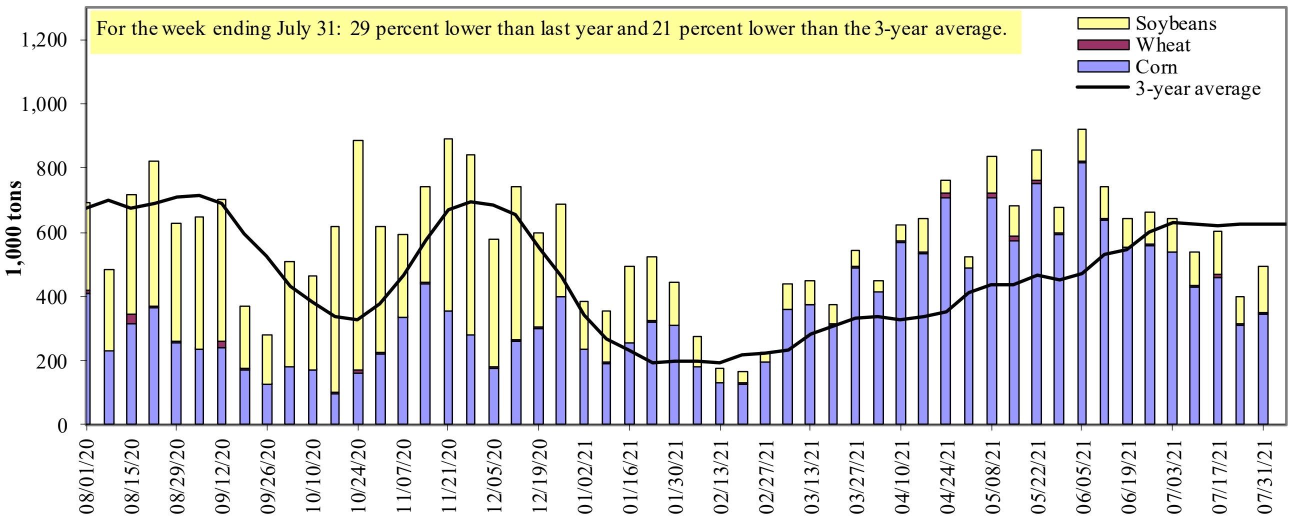


Figure 10

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 07/31/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	192	0	52	8	252
Winfield, MO (L25)	291	3	103	5	401
Alton, IL (L26)	332	3	149	5	488
Granite City, IL (L27)	344	3	147	5	499
Illinois River (La Grange)	33	0	38	0	72
Ohio River (Olmsted)	58	26	37	0	122
Arkansas River (L1)	0	31	0	0	31
Weekly total - 2021	402	60	184	5	651
Weekly total - 2020	430	33	375	0	839
2021 YTD[1]	17,814	961	5,100	203	24,078
2020 YTD[1]	11,013	1,116	7,280	97	19,506
2021 as % of 2020 YTD	162	86	70	209	123
Last 4 weeks as % of 2020[2]	107	110	41	176	79
Total 2020	18,942	1,765	19,205	237	40,149

[1] Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye.

Total may not add exactly due to rounding.

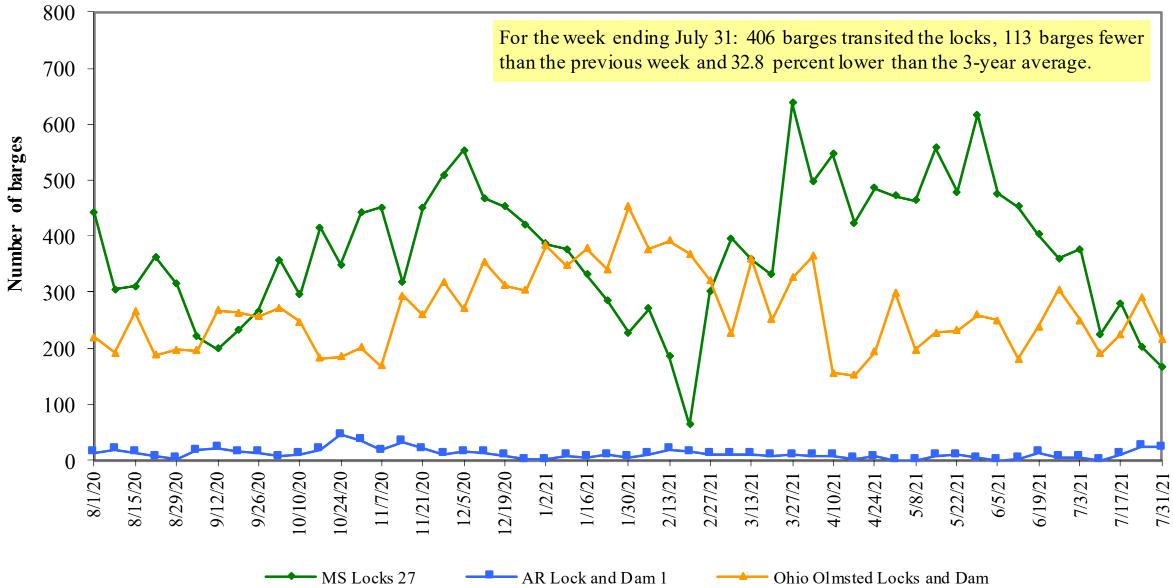
[2] As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility.

Source: U.S. Army Corps of Engineers.

Figure 11

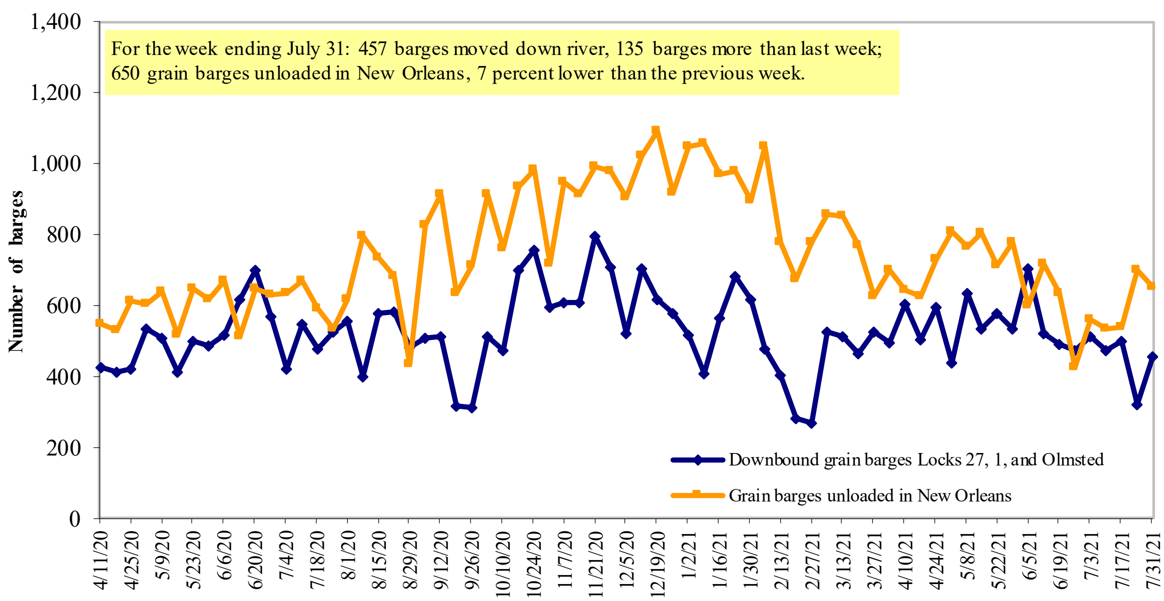
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Truck Transportation

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

Table 11

Retail on-highway diesel prices, week ending 8/2/2021 (U.S. $/gallon)

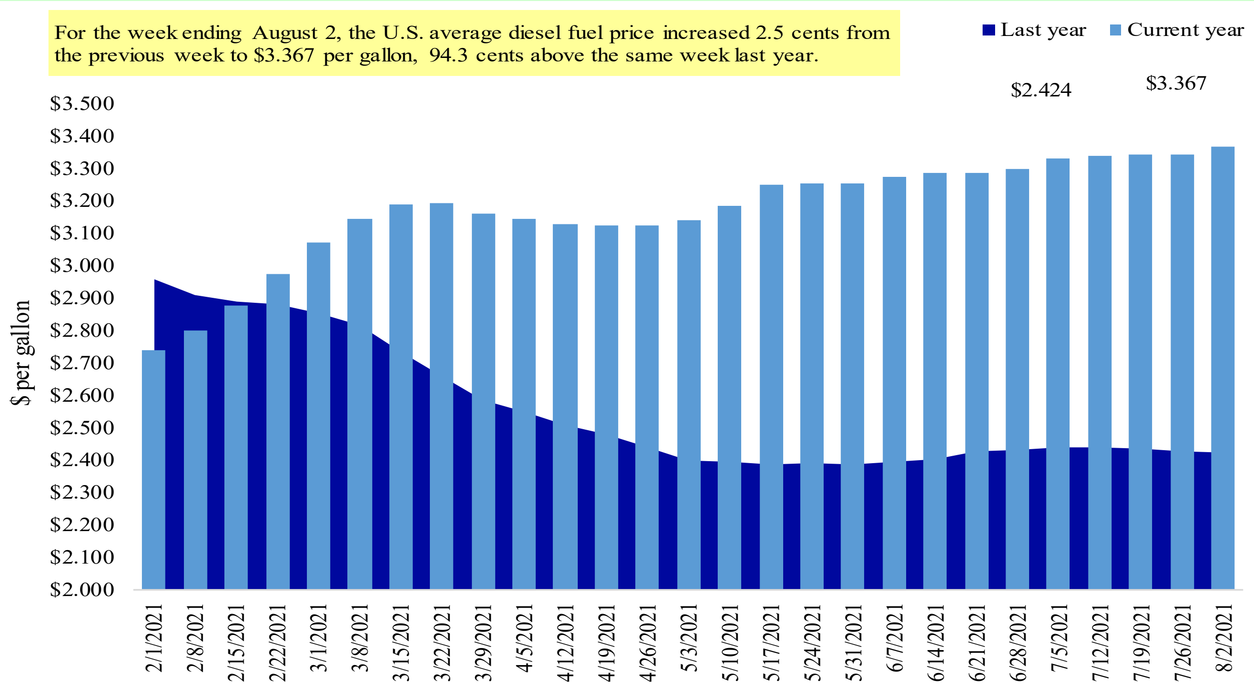
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.332	0.021	0.815
	New England	3.255	0.003	0.624
	Central Atlantic	3.493	0.020	0.797
	Lower Atlantic	3.238	0.025	0.866
II	Midwest	3.278	0.020	0.980
III	Gulf Coast	3.097	0.018	0.922
IV	Rocky Mountain	3.666	0.019	1.323
V	West Coast	3.993	0.059	1.038
	West Coast less California	3.661	0.051	1.069
	California	4.271	0.067	1.018
Total	United States	3.367	0.025	0.943

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

Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

Grain Exports

Table 12

U.S. export balances and cumulative exports (1,000 metric tons)

For the week ending	Wheat HRW	SRW	HRS	SWW	DUR	All wheat	Corn	Soybeans	Total
Export balances [1]									
7/22/2021	1,690	1,077	1,538	1,062	8	5,375	7,543	2,809	15,727
This week year ago	1,732	660	1,808	1,280	207	5,688	5,678	7,449	18,814
Cumulative exports-marketing year [2]									
2020/21 YTD	1,023	391	835	438	42	2,729	62,112	59,100	123,941
2019/20 YTD	1,792	267	1,047	546	178	3,830	38,003	39,147	80,980
YTD 2020/21 as % of 2019/20	57	146	80	80	23	71	163	151	153
Last 4 wks. as % of same period 2019/20*	93	146	87	84	4	92	166	42	95
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327

[1] Current unshipped (outstanding) export sales to date.
[2] Shipped export sales to date; 2021/22 marketing year now in effect for wheat while corn and soybeans remain in effect for the 2020/21 marketing year.
Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW = soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.
Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers[1] of U.S. corn

For the week ending 07/22/2021	Total commitments[2] 2021/22 next MY	2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
			- 1,000 mt -		
Mexico	2,225	15,080	14,324	5	14,869
Japan	932	10,952	9,815	12	11,221
Columbia	134	3,893	4,580	(15)	4,830
Korea	65	3,527	2,566	37	4,011
China	10,744	22,981	2,136	976	909
Top 5 importers	**14,100**	**56,434**	**33,422**	**69**	**35,840**
Total U.S. corn export sales	**16,657**	**69,655**	**43,681**	**59**	**49,983**
% of projected exports	26%	96%	97%		
Change from prior week[2]	**529**	**(115)**	**(29)**		
Top 5 importers' share of U.S. corn export sales	85%	81%	77%		72%
USDA forecast July 2021	**63,613**	**72,519**	**45,216**	**60**	
Corn use for ethanol USDA forecast, July 2021	**132,080**	**128,270**	**123,368**	**4**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.
[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. 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 (carryover plus accumulated export); yr. = year; avg. = average.
Note: A red number in parentheses indicates a negative number; mt = metric ton.
Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers[1] of U.S. soybeans

For the week ending 07/22/2021	Total commitments[2] 2021/22 next MY	2020/21 current MY	2019/20 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2017-19
			1,000 mt -		- 1,000 mt -
China	4,257	35,826	16,376	119	19,106
Mexico	1,040	4,804	4,729	2	4,591
Egypt	0	2,777	3,754	(26)	2,980
Indonesia	14	2,321	2,213	5	2,360
Japan	170	2,336	2,402	(3)	2,288
Top 5 importers	**5,480**	**48,065**	**29,475**	**63**	**31,324**
Total U.S. soybean export sales	**10,178**	**61,909**	**46,595**	**33**	**49,352**
% of projected exports	18%	100%	102%		
change from prior week[2]	**313**	**(79)**	**201**		
Top 5 importers' share of U.S. soybean export sales	54%	78%	63%		**63%**
USDA forecast, July 2021	**56,540**	**61,853**	**45,749**	**135**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.
[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.
[3]FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.
Note: A red number in parentheses indicates a negative number; mt = metric ton.
Source: USDA, Foreign Agricultural Service.

Table 15

Top 10 importers[1] of all U.S. wheat

For the week ending 07/22/2021	Total Commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
		1,000 mt -		- 1,000 mt -
Mexico	1,356	949	43	3,388
Philippines	1,263	1,345	(6)	3,121
Japan	854	946	(10)	2,567
Korea	451	584	(23)	1,501
Nigeria	579	483	20	1,490
China	612	1,012	(39)	1,268
Taiwan	291	462	(37)	1,187
Indonesia	0	269	(100)	1,131
Thailand	171	202	(15)	768
Italy	54	307	(82)	681
Top 10 importers	**5,632**	**6,557**	(14)	**17,102**
Total U.S. wheat export sales	**8,104**	**9,518**	(15)	**24,617**
% of projected exports	34%	35%		
change from prior week[2]	**515**	**677**		
Top 10 importers' share of U.S. wheat export sales	70%	69%		69%
USDA forecast, July 2021	**23,842**	**27,030**	(12)	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; Marketing year (MY) = Jun 1 - May 31.
[2] Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The 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 (carryover plus accumulated export); yr. = year; avg. = average.
Note: A red number in parentheses indicates a negative number.
Source: USDA, Foreign Agricultural Service.

Table 16

Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 07/29/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	186	188	99	8,940	9,371	95	63	80	15,966
Corn	271	327	83	12,263	6,426	191	124	106	9,969
Soybeans	0	0	n/a	3,758	2,759	136	0	0	14,028
Total	**457**	**515**	**89**	**24,961**	**18,557**	**135**	**89**	**75**	**39,963**
Mississippi Gulf									
Wheat	131	83	158	1,777	2,330	76	116	143	3,422
Corn	924	613	151	28,576	17,486	163	135	130	28,781
Soybeans	114	127	90	10,815	12,493	87	29	28	38,013
Total	**1,169**	**823**	**142**	**41,168**	**32,309**	**127**	**90**	**88**	**70,215**
Texas Gulf									
Wheat	26	138	19	2,409	2,710	89	73	91	4,248
Corn	0	0	n/a	322	459	70	168	105	723
Soybeans	0	0	n/a	656	7	n/a	n/a	0	2,098
Total	**26**	**138**	**19**	**3,387**	**3,175**	**107**	**78**	**93**	**7,068**
Interior									
Wheat	63	126	50	1,749	1,335	131	199	209	2,263
Corn	158	214	74	5,604	5,032	111	96	101	8,683
Soybeans	73	100	73	3,529	3,732	95	74	56	7,274
Total	**294**	**440**	**67**	**10,881**	**10,098**	**108**	**102**	**95**	**18,220**
Great Lakes									
Wheat	0	0	n/a	253	392	65	35	39	891
Corn	7	9	75	55	0	n/a	n/a	73	111
Soybeans	0	22	0	56	112	50	58	40	1,111
Total	**7**	**32**	**23**	**365**	**505**	**72**	**58**	**44**	**2,113**
Atlantic									
Wheat	1	8	16	87	9	950	309	500	65
Corn	0	0	n/a	14	8	174	n/a	n/a	33
Soybeans	3	5	57	1,069	432	248	78	16	1,870
Total	**4**	**13**	**31**	**1,170**	**449**	**261**	**116**	**27**	**1,968**
U.S. total from ports*									
Wheat	408	542	75	15,216	16,146	94	82	102	26,854
Corn	1,360	1,163	117	46,834	29,411	159	125	117	48,301
Soybeans	191	255	75	19,882	19,535	102	38	28	64,394
Total	**1,958**	**1,960**	**100**	**81,932**	**65,093**	**126**	**90**	**84**	**139,548**

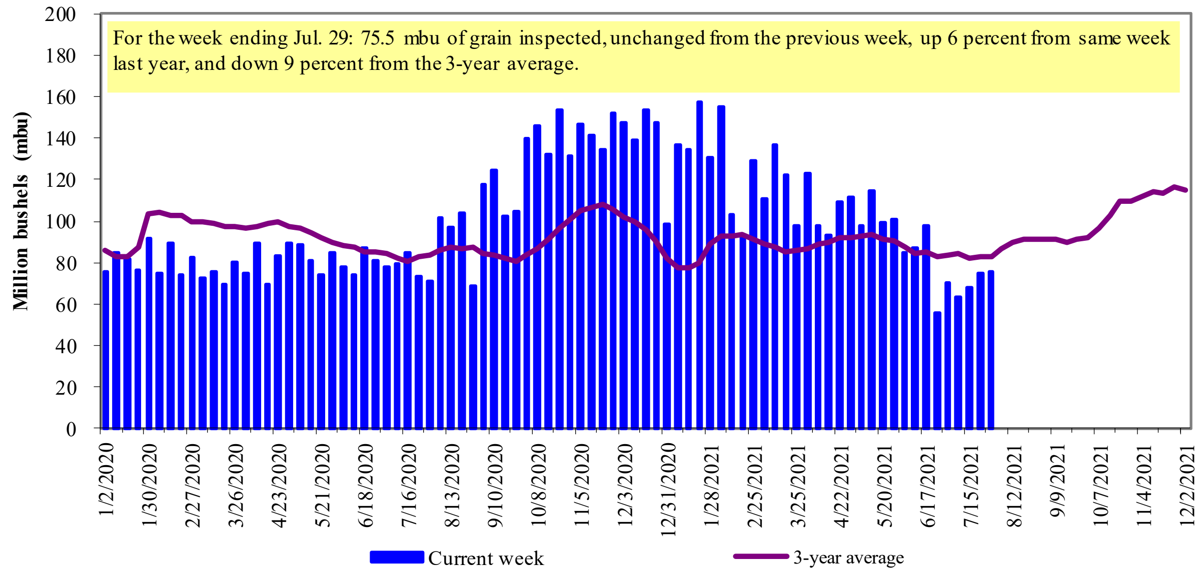
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

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 2020.

Figure 14

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

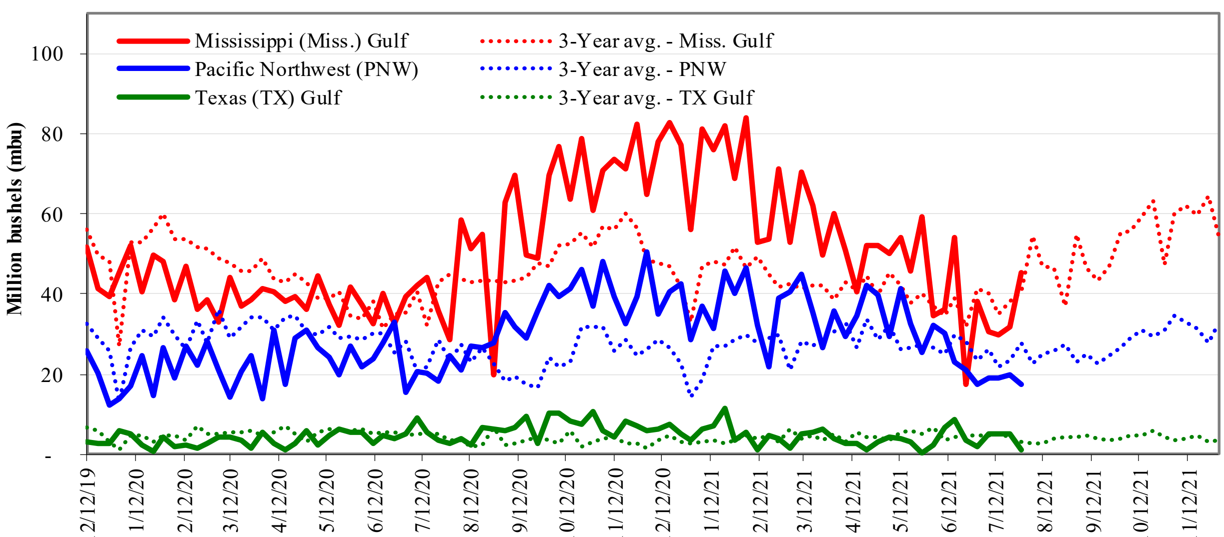


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 07/29/21 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf:	45.4	Last wk:	up 43	down 81	up 26	down 11
PNW:	17.5	Last Year (same wk):	up 58	down 62	up 49	down 28
TX Gulf:	1.0	3-yr avg. (4-wk. mov. Avg):	up 18	down 77	up 8	down 29

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

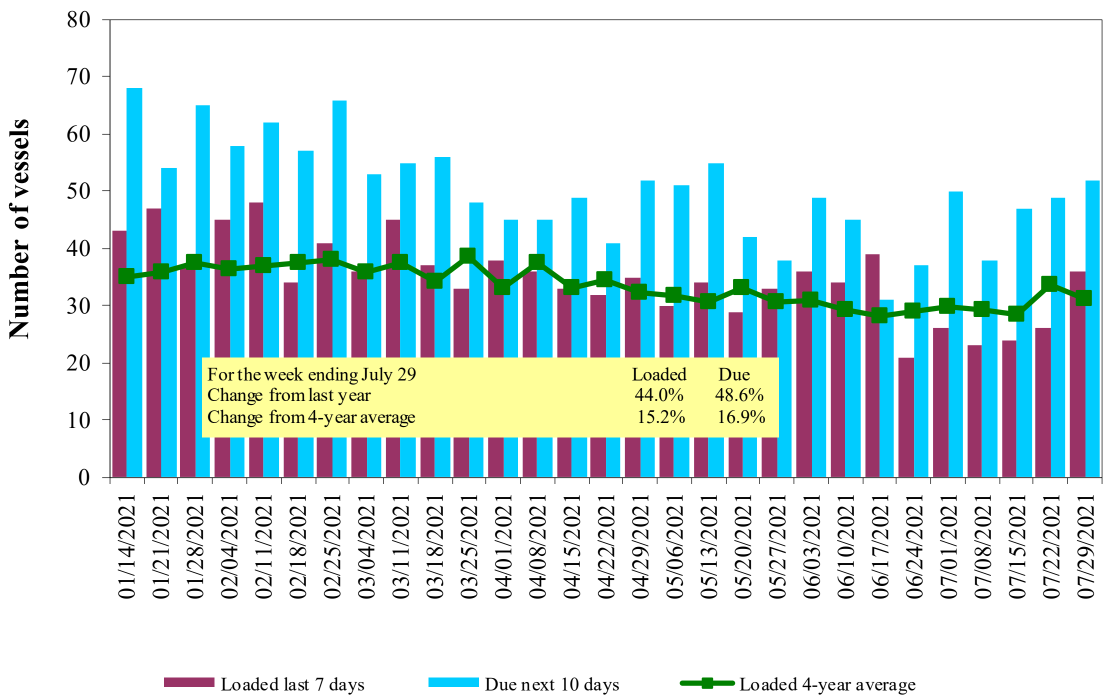
Weekly port region grain ocean vessel activity (number of vessels)

	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
7/29/2021	16	36	52	12
7/22/2021	29	26	49	12
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

Note: n/a = not available due to holiday.

Source: USDA, Agricultural Marketing Service.

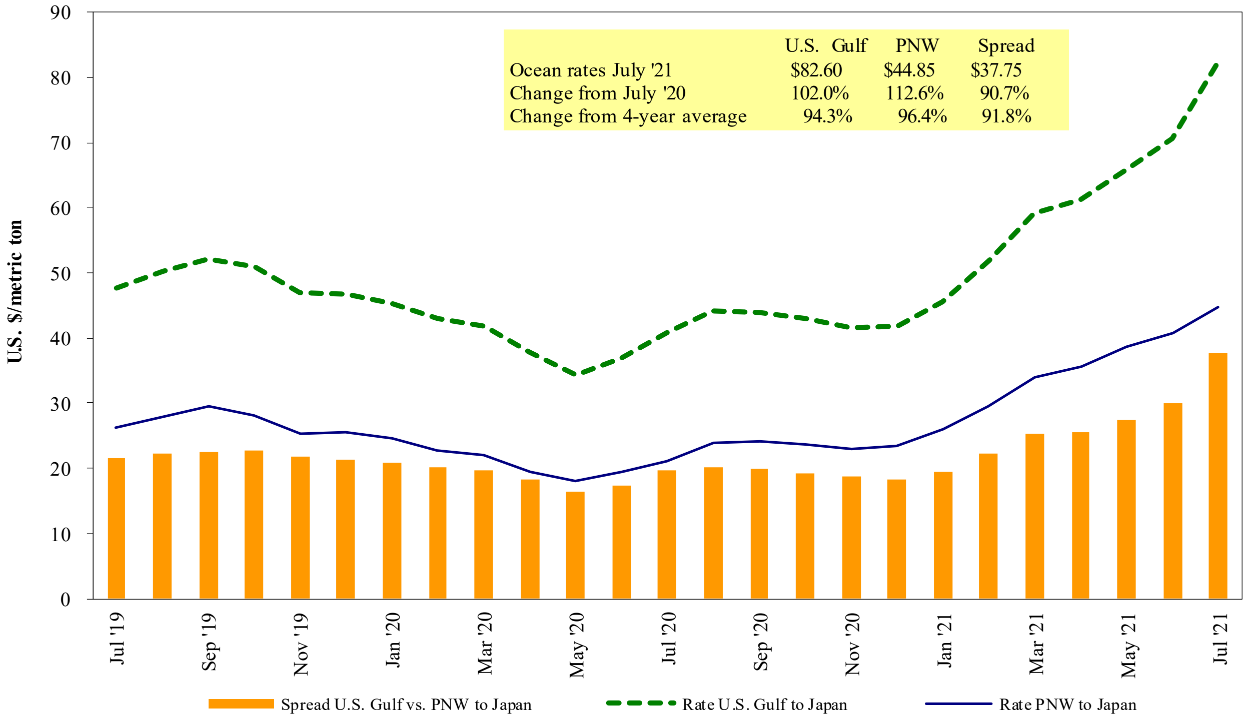
Figure 16
U.S. Gulf[1] vessel loading activity



[1]U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source:USDA, Agricultural Marketing Service.

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

Ocean freight rates for selected shipments, week ending 07/31/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Oct 1/10	48,000	70.10
U.S. Gulf	Japan	Heavy grain	Aug 21/Sep 9	50,000	60.90
U.S. Gulf	Japan	Heavy grain	Aug 1/10	50,000	69.75
U.S. Gulf	Japan	Heavy grain	Jul 1/15	50,000	64.10
U.S. Gulf	Japan	Grain	May 25/Jun 25	50,000	46.85 op 47.85
U.S. Gulf	Japan	Heavy grain	Apr 15/May 15	50,000	47.00
U.S. Gulf	Sudan	Wheat	Sep 1/10	49,000	79.12*
U.S. Gulf	Djibouti	Wheat	Jul 6/16	5,880	85.70*
PNW	Japan	Wheat	Sep 1	52,170	56.55*
PNW	Japan	Wheat	Jul 25/ Aug 5	32,590	64.00
PNW	Japan	Wheat	Jul 16/31	30,250	64.35
PNW	Japan	Wheat	Jun 5/15	50,600	49.30
PNW	Yemen	Wheat	Jun 10/20	22,230	132.25*
PNW	Taiwan	Heavy grain	Aug 20/30	35,000	64.20*
PNW	Taiwan	Wheat	Aug 1/10	55,000	54.95
PNW	Taiwan	Wheat	May 29/Jun 12	45,665	48.00

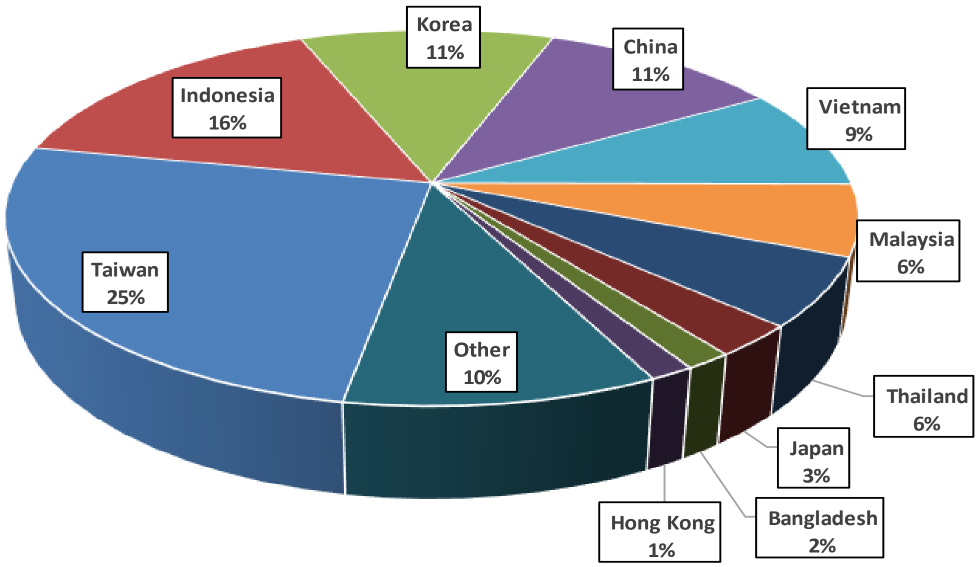
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

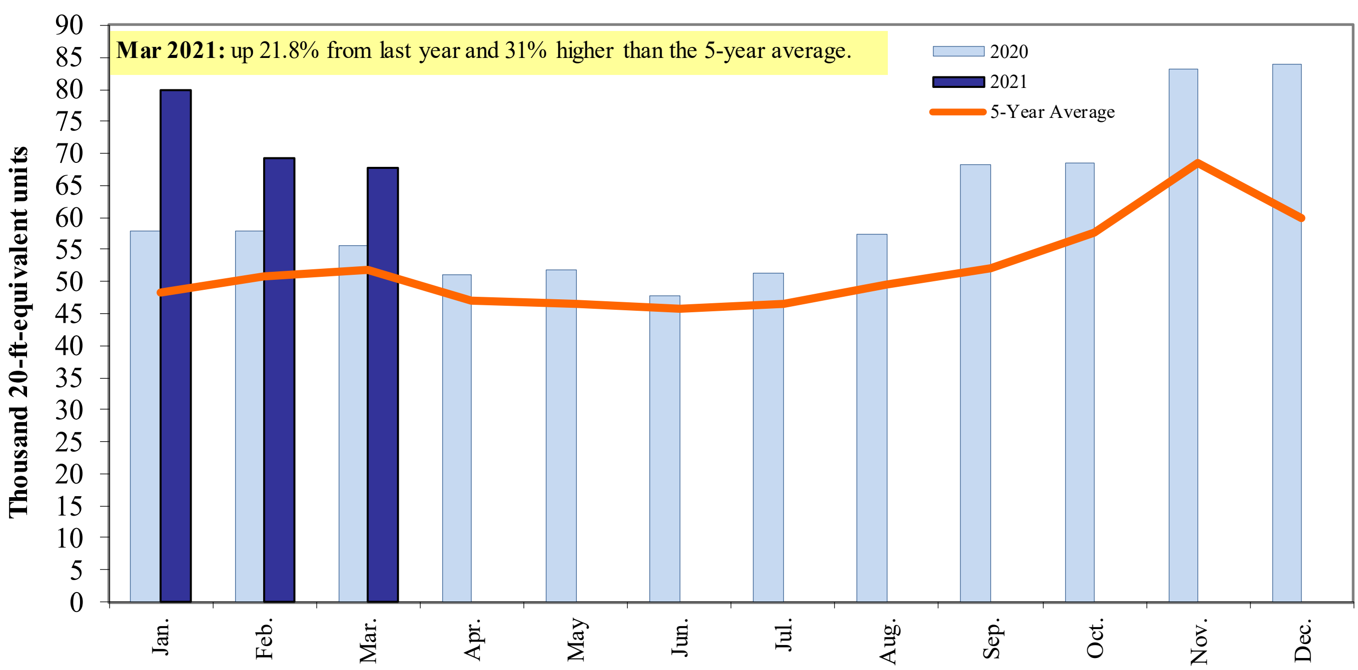
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Mar 2021



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 19
Monthly shipments of U.S. containerized grain exports



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Contacts and Links

Coordinators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Maria Williams	maria.williams@usda.gov	(202) 690 - 4430
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Rail Transportation		
Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690 - 3244
Barge Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Truck Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Grain Exports		
Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@usda.gov	(202) 720 - 7880
Editor		
Maria Williams	maria.williams@usda.gov	(202) 690-4430

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