



# Grain Transportation Report

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

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## WEEKLY HIGHLIGHTS

### Contents

Article/  
Calendar

Grain  
Transportation  
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean  
Rate Advisory

Datasets

Specialists

Subscription  
Information

The next  
release is  
March 1, 2018

#### U.S. Army Corps of Engineers begins Lake Pepin Ice Measurements

On February 21, the U.S. Army Corps of Engineers, St. Paul District, began taking this year's Lake Pepin ice measurements, which are used to predict the opening of the Upper Mississippi River. Lake Pepin, located between Red Wing and Wabasha, MN, is the last part of the navigation channel for the ice to break up because of its slower river currents. The navigation season begins when vessels pass through Lake Pepin and arrive in St. Paul, MN. Historically, the opening date of the navigation season occurs during the third week of March. Last year, the beginning of the navigation season was on March 9, when milder February temperatures and less ice accumulation allowed an early passage through Lake Pepin. At this time, no estimates are available for the opening of the 2018 navigation season on the Upper Mississippi River.

#### USDA Agricultural Projections to 2027

On February 15, USDA released its [USDA Agricultural Projections to 2027](#) report. These projections are the department's official long run representative scenarios for the agricultural sector for the next 10 years, and are developed through a consensus of involved USDA agencies. USDA projects a strong global demand for soybeans that is expected to encourage U.S. soybean plantings to exceed corn acreage, for the first time ever. However, competition from South America, primarily Brazil, the world's leading exporter, is projected to lead to a reduced U.S. share of global soybean trade. While falling corn production is projected to characterize the first few years of the forecast period, corn production increases are projected to occur in the latter years. The United States is projected to remain the world's largest corn exporter, over the forecast period. U.S. wheat exports are projected to decline in the short-run, followed by a period of slow volume growth. If realized, the projections could impact the demand for grain transportation.

#### Total Grain Inspections Down but Corn Increases

For the week ending February 15, **total inspections of grain** (corn, wheat, and soybeans) for export, from all major U.S. export regions, reached 2.38 million metric tons (mmt); down 14 percent from the previous week, 17 percent from last year, and 14 percent below the 3-year average. Although total grain inspections decreased, corn inspections increased 11 percent from the previous week, as shipments to Asia and Latin America rebounded. Inspections of wheat and soybeans dropped 15 and 28 percent, respectively, from the past week. Mississippi Gulf grain inspections decreased 11 percent from the previous week, and Pacific Northwest (PNW) inspections dropped 21 percent for the same period. Outstanding (unshipped) export sales continued to increase for corn, but decreased for wheat and soybeans.

### Snapshots by Sector

#### Export Sales

For the week ending February 8, **unshipped balances** of wheat, corn, and soybeans totaled 34 mmt; down 8 percent from the same time last year. Net weekly **wheat export sales** were .311 mmt; down 21 percent from the previous week. Net **corn export sales** were 1.98 mmt; up 12 from the previous week. Net **soybean export sales** were .561 mmt for the same period; down 24 percent from the previous week.

#### Rail

U.S. Class I railroads originated 19,035 **grain carloads** for the week ending February 10; down 23 percent from the previous week, 7 percent from last year, and 11 percent from the 3-year average.

Average March shuttle **secondary railcar** bids/offers per car were \$488 above tariff for the week ending February 15; up \$271 from last week, and \$694 lower than last year. There were no non-shuttle bids/offers this week.

#### Barge

For the week ending February 17, **barge grain movements** totaled 571,243 tons; 25 percent lower than the previous week and down 23 percent from the same period last year.

For the week ending February 17, 362 grain barges **moved down river**; down 24 percent from last week. There were 545 grain barges **unloaded in New Orleans**; 27 percent lower than the previous week.

#### Ocean

For the week ending February 15, 36 **ocean-going grain vessels** were loaded in the Gulf; 16 percent less than the same period last year. Forty-seven vessels are expected to be loaded within the next 10 days; 30 percent less than the same period last year.

For the week ending February 15, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$43 per metric ton; unchanged from the previous week. The cost of shipping from the PNW to Japan was \$23.25 per metric ton; unchanged from the previous week.

#### Fuel

During the week ending February 19, average **diesel fuel prices** decreased 4 cents from the previous week at \$3.03 per gallon; 46 cents higher than the same week last year.

# Feature Article/Calendar

## Corn and Soybean Transportation Costs Above Third Quarter and Last Year

During the fourth quarter 2017, transportation costs for shipping corn and soybeans from Minneapolis, MN, through the Gulf and the Pacific Northwest (PNW) to Japan, increased from the third quarter and last year. Transportation costs increased for shipping grain, from quarter to quarter through each region, primarily due to higher truck, barge, and ocean freight rates. Trucking rates rose as activity increased and diesel prices decreased. Barge rates increased as high water conditions and earlier lock and dam repairs, helped boost the demand for barge services. The increase in ocean freight rates was caused by increased demand for thermal coal and bulk grain (see February 8, 2018 *Grain Transportation Report (GTR)*). Rail rates remained steady from quarter to quarter, but increased slightly from year to year.

Quarter-to-quarter total landed costs for shipping corn, through the Gulf and PNW to Japan, were generally up for each route, with the exception of slightly lower costs for corn shipped through the PNW (see tables 1 and 2). Compared to last year, total fourth quarter landed costs for shipping corn and soybeans from the Midwest to Japan, through the PNW and Gulf, increased for each route (see figure). Lower farm values could not offset the increase in total landed costs for shipping corn and soybeans.

**U.S. Gulf Costs:** Due to higher shipping rates for each mode, fourth quarter transportation costs for shipping grain from Minneapolis through the Gulf to Japan, decreased 13 percent for corn and soybeans from quarter to quarter (table 1). Ocean rates increased 11 percent from the previous quarter, and 29 percent from last year. Fourth quarter barge rates, for shipping grain to the Gulf, increased 18 percent from the previous quarter but remained unchanged from last year. Trucking rates increased 11 percent from the third quarter, and jumped 36 percent from the fourth quarter 2016. Year-to-year transportation costs for shipping corn and soybeans through the Gulf increased 18 percent; due mainly to significant increases in trucking and ocean rates (see table 1).

**Table 1: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. Gulf**

	Corn					Soybeans				
	\$/metric ton			Percent change		\$/metric ton			Percent Change	
	4thQtr 16	3rdQtr 17	4thQtr 17	Yr. to Yr.	Qtr to Qtr	4thQtr 16	3rdQtr 17	4thQtr 17	Yr. to Yr.	Qtr to Qtr
Truck	10.58	13.02	14.39	36.01	10.52	10.58	13.02	14.39	36.01	10.52
Barge	31.93	26.99	31.93	0.00	18.30	31.93	26.99	31.93	0.00	18.30
Ocean	33.67	39.23	43.56	29.37	11.04	33.67	39.23	43.56	29.37	11.04
<b>Total Transportation Cost</b>	76.18	79.24	89.88	17.98	13.43	76.18	79.24	89.88	17.98	13.43
Farm Value <sup>1</sup>	124.14	122.83	117.05	-5.71	-4.71	337.92	333.76	332.04	-1.74	-0.52
<b>Total Landed Cost</b>	200.32	202.07	206.93	3.30	2.41	414.10	413.00	421.92	1.89	2.16
Transportation % Landed Cost	38.03	39.21	43.43			18.40	19.19	21.30		

**Table 2: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. PNW**

	Corn					Soybeans				
	\$/metric ton			Percent change		\$/metric ton			Percent Change	
	4thQtr 16	3rdQtr 17	4thQtr 17	Yr. to Yr.	Qtr to Qtr	4thQtr 16	3rdQtr 17	4thQtr 17	Yr. to Yr.	Qtr to Qtr
Truck	10.58	13.02	14.39	36.01	10.52	10.58	13.02	14.39	36.01	10.52
Rail <sup>2</sup>	49.29	49.65	49.65	0.73	0.00	55.81	56.11	56.35	0.97	0.43
Ocean	18.43	20.71	24.56	33.26	18.59	18.43	20.71	24.56	33.26	18.59
<b>Total Transportation Cost</b>	78.30	83.38	88.60	13.15	6.26	84.82	89.84	95.30	12.36	6.08
Farm Value <sup>1</sup>	124.14	122.83	117.05	-5.71	-4.71	337.92	333.76	332.04	-1.74	-0.52
<b>Total Landed Cost</b>	202.44	206.21	205.65	1.59	-0.27	422.74	423.60	427.34	1.09	0.88
Transportation % Landed Cost	38.68	40.43	43.08			20.06	21.21	22.30		

<sup>1</sup> Source: USDA/NASS, Agricultural Prices; includes quarterly prices in dollars per bushel converted to dollars per metric ton

<sup>2</sup> Rail tariffs include fuel surcharges and revisions for heavy axle rail cars 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

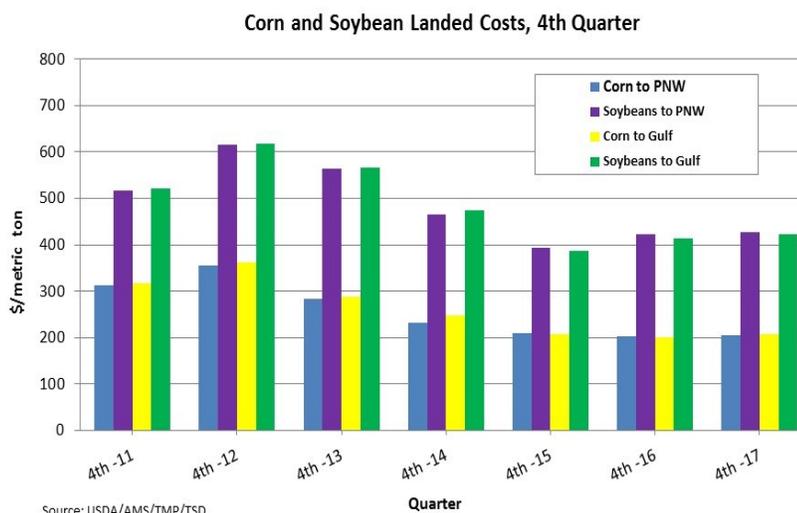
Total landed costs, for shipping corn and soybeans through the Gulf, reached \$207 per metric ton (mt) and \$422 per mt, respectively, during the fourth quarter. Quarter-to-quarter landed costs for shipping through the Gulf increased over 2 percent for corn and soybeans, due to higher transportation costs (table 1). Year-to-year landed costs, for shipping from the Gulf, increased 3 percent for corn and 2 percent for soybeans

because of higher trucking and ocean rates (*see table 1*). Transportation costs for shipping corn from the Gulf to Japan accounted for 43 percent of the total landed cost during the fourth quarter; above the previous quarter and last year. The soybean transportation costs' share of the total landed cost accounted for 21 percent, also above the previous quarter and last year (*see table 1*).

**Pacific Northwest Costs:** Fourth quarter transportation costs for shipping corn and soybeans from Minneapolis through the PNW to Japan, increased over 6 percent from quarter to quarter (*see table 2*). Higher trucking rates, and PNW ocean freight rates, caused an increase in quarter-to-quarter transportation costs. Rail rates for shipping corn and soybeans to the PNW remained mostly unchanged from quarter-to-quarter. Year-to-year

transportation costs for shipping grain to the PNW increased 13 percent for corn and 12 percent for soybeans, also due to higher trucking, rail, and ocean rates.

The total landed cost for shipping grain from the PNW to Japan remained unchanged from the previous quarter, for corn, but increased 1 percent for soybeans. Total fourth-quarter landed costs ranged from \$206 per mt to \$427 per mt (*see table 2*). Year-to-year total landed cost increased 2 percent for corn and 1 percent for soybeans. Transportation costs for shipping grain to the PNW accounted for 43 percent of the landed cost for corn and 22 percent for soybeans; each above the third quarter and last year.



According to USDA's Grain Inspection, Packers and Stockyards Administration, fourth quarter inspections of corn for export decreased 33 percent from the previous year; 8 percent below the 5-year average (*see January 11, 2018 GTR*). Total fourth-quarter export inspections of corn to Japan reached 1.5 mmt; down 24 percent from 2016, partially due to increased competition from South America. Soybean inspections totaled 25.8 mmt; down 17 percent from the previous year, with shipments destined for Japan reaching .567 mmt, down 2 percent from 2016.

According to USDA's February *World Agricultural Supply and Demand Estimates* report, the forecast for 2017/18 corn exports is up 7 percent from January, but down 11 percent from the 2016/17 marketing year. The increased forecast for corn exports was helped by higher U.S. stocks and a weakening U.S. dollar. The forecast for 2017/18 soybean exports is down 3 percent from the January forecast, and 3 percent below the estimate for the 2016/17 marketing year. [Johnny.Hill@ams.usda.gov](mailto:Johnny.Hill@ams.usda.gov)



# Rail Transportation

Table 3

## Rail Deliveries to Port (carloads)<sup>1</sup>

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
02/14/2018 <sup>p</sup>	420	1,173	5,976	371	7,940	2/10/2018	1,461
02/07/2018 <sup>r</sup>	419	1,617	5,926	342	8,304	2/3/2018	1,801
2018 YTD <sup>r</sup>	3,874	10,360	42,844	1,859	58,937	2018 YTD	12,070
2017 YTD <sup>r</sup>	5,927	13,270	42,633	5,590	67,420	2017 YTD	14,342
2018 YTD as % of 2017 YTD	65	78	100	33	87	% change YTD	84
Last 4 weeks as % of 2017 <sup>2</sup>	67	84	98	42	89	Last 4wks % 2017	89
Last 4 weeks as % of 4-year avg. <sup>2</sup>	61	107	104	39	95	Last 4wks % 4 yr	98
Total 2017	28,766	76,045	289,178	21,999	415,988	Total 2017	119,661
Total 2016	36,925	87,863	299,606	29,007	453,401	Total 2016	92,982

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

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

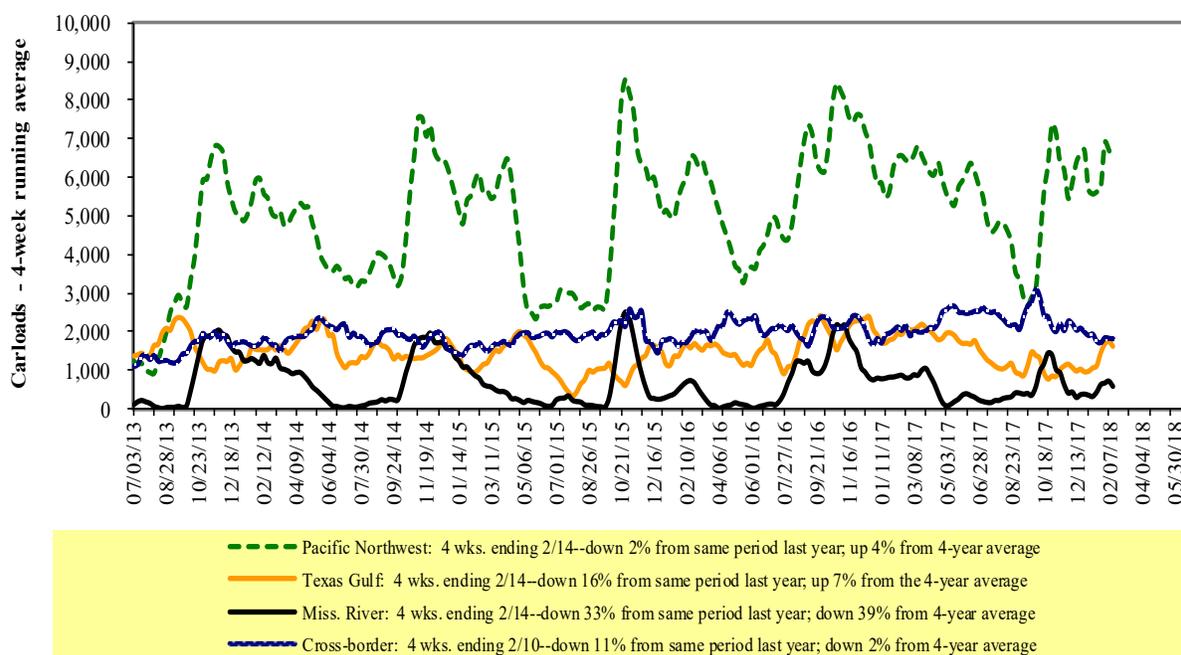
<sup>3</sup>Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Grupo Mexico.

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

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2  
Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

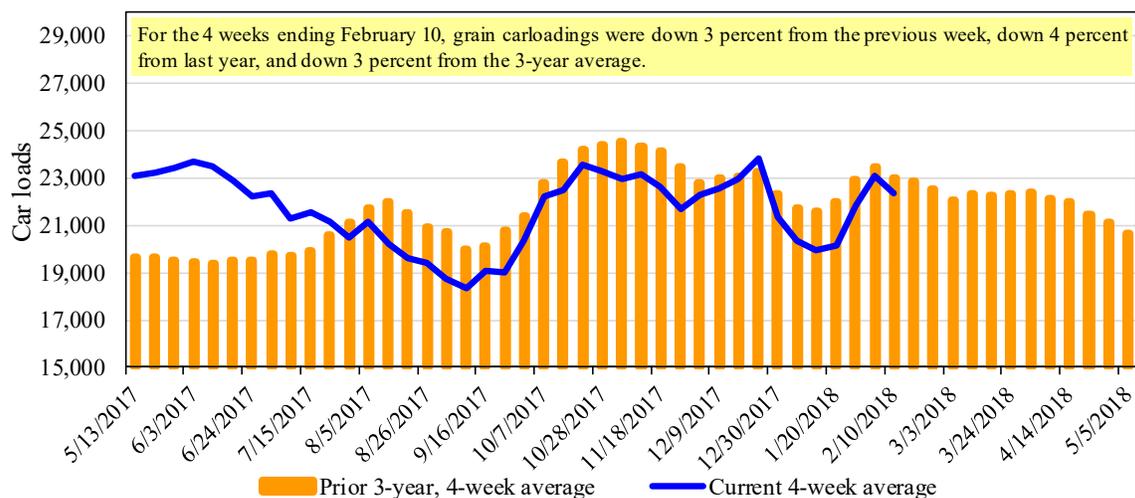
For the week ending: 2/10/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,112	2,356	10,270	630	4,667	19,035	3,064	4,254
This week last year	2,158	2,792	8,528	877	6,122	20,477	3,885	4,300
2018 YTD	10,767	14,460	69,520	5,867	30,504	131,118	20,891	25,343
2017 YTD	12,511	18,024	66,489	6,327	36,126	139,477	22,550	25,152
2018 YTD as % of 2017 YTD	86	80	105	93	84	94	93	101
Last 4 weeks as % of 2017*	84	81	110	77	85	96	91	103
Last 4 weeks as % of 3-yr avg.**	82	81	109	95	90	97	94	101
Total 2017	89,465	142,827	578,964	50,223	289,574	1,151,053	198,763	244,766

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

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

Source: Association of American Railroads (www.aar.org)

Figure 3

**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

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

For the week ending: 2/15/2018		Delivery period							
		Mar-18	Mar-17	Apr-18	Apr-17	May-18	May-17	Jun-18	Jun-17
BNSF <sup>3</sup>	COT grain units	0	173	0	1	0	0	no bids	0
	COT grain single-car <sup>5</sup>	84	285	0	75	no bids	24	no bids	11
UP <sup>4</sup>	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bids	10	no bids	no bids	no offer	no offer	n/a	n/a

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

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

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

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

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

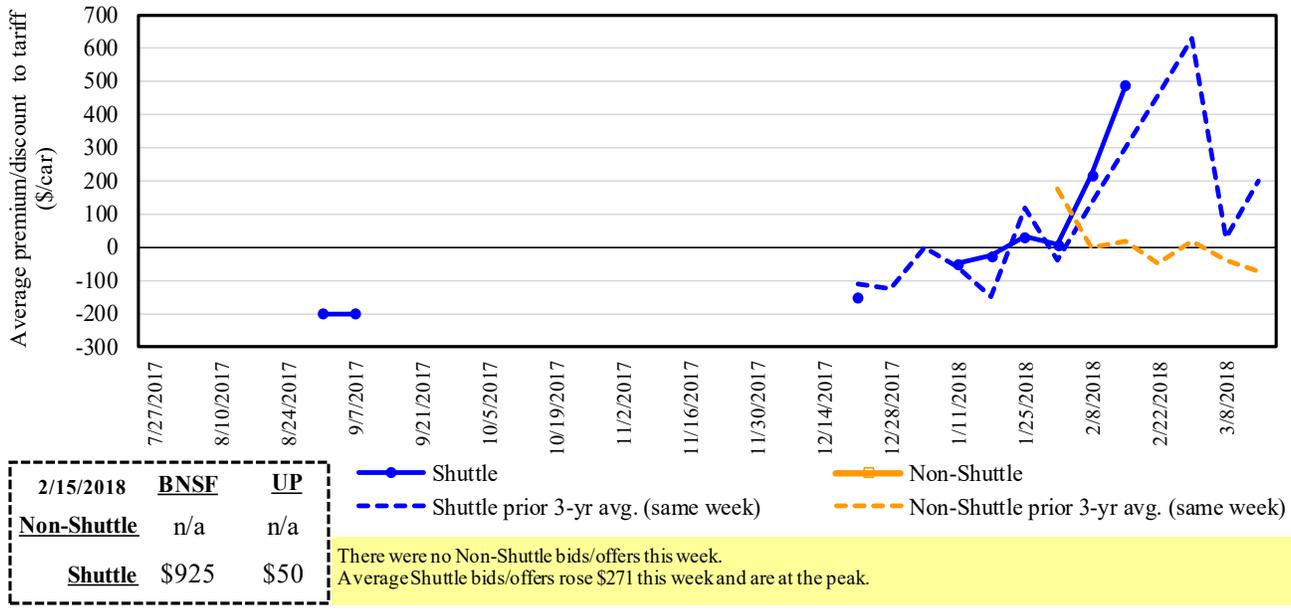
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

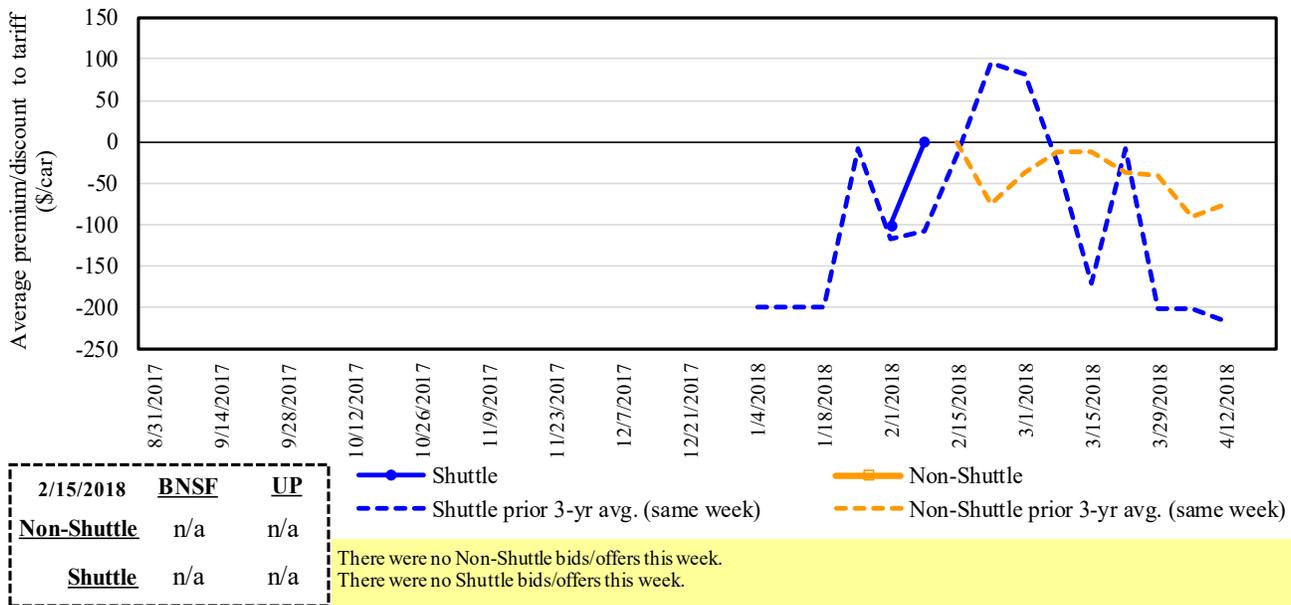
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



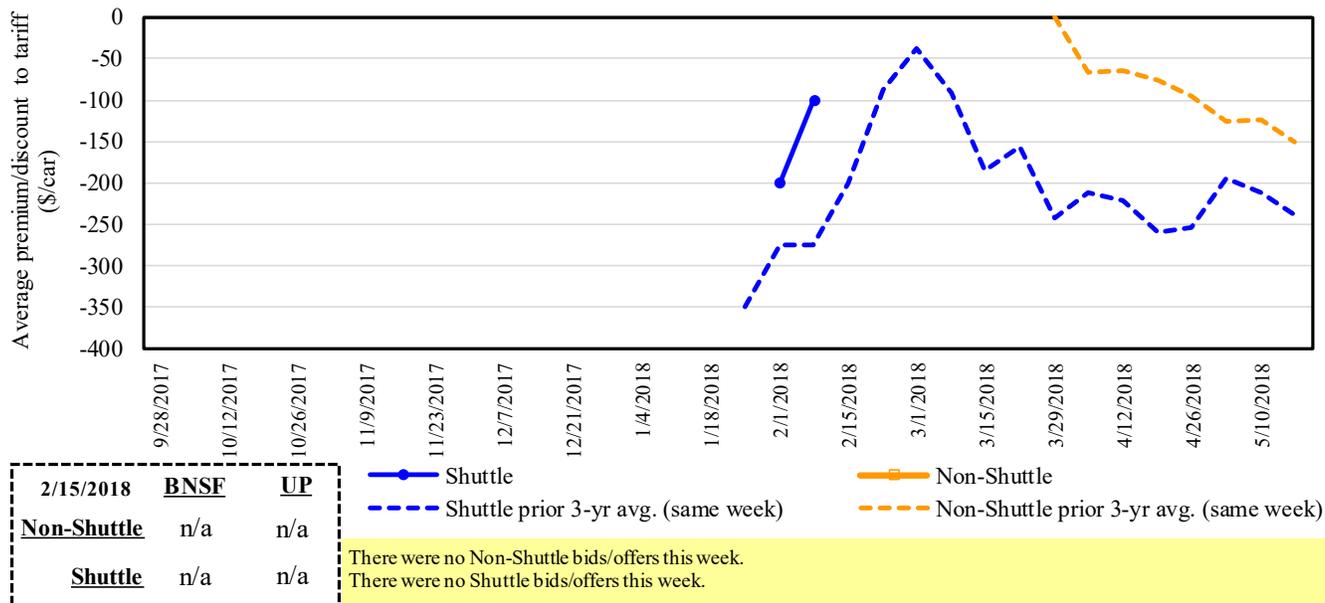
Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
 Source: Transportation & Marketing Programs/AMS/USDA

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



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

**Figure 6**  
**Bids/Offers for Railcars to be Delivered in May 2018, Secondary Market**



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

Table 6

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

For the week ending: 2/15/2018		Delivery period					
		Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18
Non-shuttle	<b>BNSF-GF</b>	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 2017	n/a	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	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 2017	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	<b>BNSF-GF</b>	925	n/a	n/a	n/a	n/a	n/a
	Change from last week	492	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	(1075)	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	50	n/a	n/a	n/a	n/a	n/a
	Change from last week	50	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	(313)	n/a	n/a	n/a	n/a	n/a

<sup>1</sup>Average premium/discount to tariff, \$/car-last week

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

**Tariff Rail Rates for Unit and Shuttle Train Shipments<sup>1</sup>**

February, 2018	Origin region <sup>3</sup>	Destination region <sup>3</sup>	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>4</sup>
					metric ton	bushel <sup>2</sup>	
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,883	\$86	\$39.41	\$1.07	4
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1
	Wichita, KS	New Orleans, LA	\$4,540	\$151	\$46.59	\$1.27	5
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	1
	Northwest KS	Galveston-Houston, TX	\$4,816	\$166	\$49.47	\$1.35	5
	Amarillo, TX	Los Angeles, CA	\$5,021	\$231	\$52.15	\$1.42	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$171	\$40.74	\$1.03	9
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
	Des Moines, IA	Davenport, IA	\$2,258	\$36	\$22.78	\$0.58	1
	Indianapolis, IN	Atlanta, GA	\$5,446	\$0	\$54.08	\$1.37	5
	Indianapolis, IN	Knoxville, TN	\$4,540	\$0	\$45.08	\$1.15	5
	Des Moines, IA	Little Rock, AR	\$3,609	\$106	\$36.90	\$0.94	3
	Des Moines, IA	Los Angeles, CA	\$5,327	\$310	\$55.98	\$1.42	5
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$156	\$37.61	\$1.02	2
	Toledo, OH	Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5
	Indianapolis, IN	Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5
	Indianapolis, IN	Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$171	\$48.82	\$1.33	7
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	2
	Chicago, IL	Albany, NY	\$5,663	\$0	\$56.24	\$1.53	3
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	0
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0
	Northwest KS	Portland, OR	\$5,812	\$272	\$60.42	\$1.64	5
	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0
Corn	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,731	\$171	\$38.75	\$0.98	9
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0
	Des Moines, IA	Amarillo, TX	\$3,970	\$134	\$40.75	\$1.04	3
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0
	Council Bluffs, IA	Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2
	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
	Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0
	Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$197	\$49.38	\$1.34	7
Soybeans	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3
	Grand Island, NE	Portland, OR	\$5,710	\$278	\$59.47	\$1.62	7

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

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

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

<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Table 8

**Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico**

Date: February, 2018			Fuel				Percent
Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	surcharge per car <sup>2</sup>	Tariff plus surcharge per:		change <sup>4</sup> Y/Y
					metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$118	\$68.96	\$1.87	1
	KS	Guadalajara, JA	\$7,309	\$269	\$77.42	\$2.10	2
	TX	Salinas Victoria, NL	\$4,292	\$72	\$44.59	\$1.21	2
Corn	IA	Guadalajara, JA	\$8,313	\$248	\$87.47	\$2.22	2
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$244	\$84.38	\$2.14	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$238	\$77.83	\$1.98	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$230	\$85.47	\$2.32	-6
	NE	Guadalajara, JA	\$8,692	\$253	\$91.39	\$2.48	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$188	\$78.43	\$2.13	0
Sorghum	NE	Celaya, GJ	\$7,345	\$231	\$77.40	\$1.96	3
	KS	Queretaro, QA	\$7,819	\$148	\$81.40	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$119	\$67.13	\$1.70	5
	NE	Torreon, CU	\$6,790	\$182	\$71.23	\$1.81	3

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

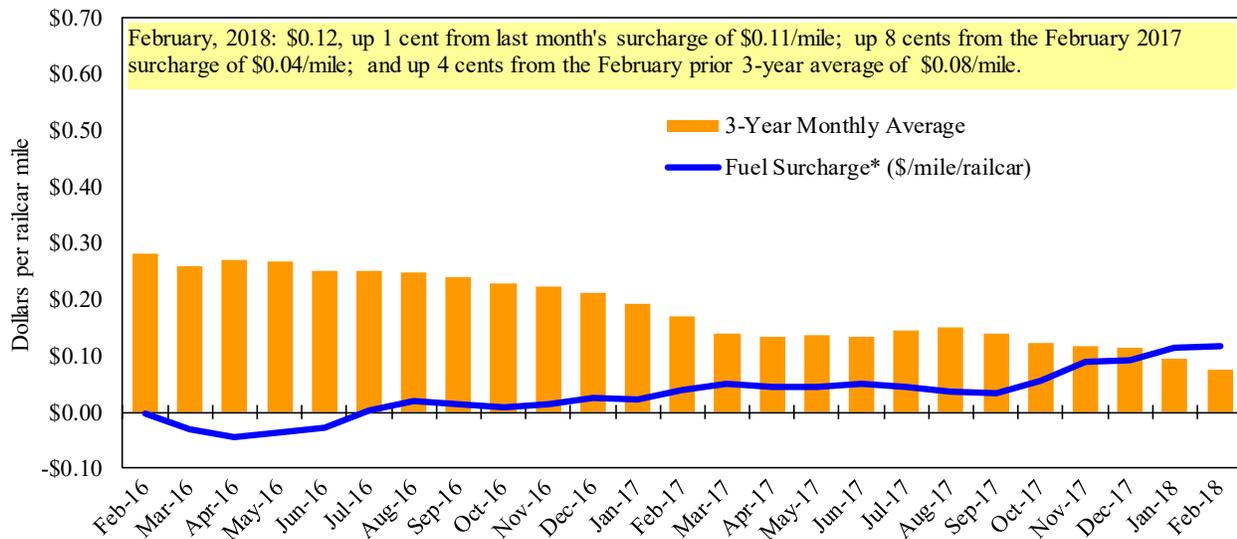
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

<sup>4</sup>Percentage change calculated using tariff rate plus fuel surcharge

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

Figure 7

**Railroad Fuel Surcharges, North American Weighted Average<sup>1</sup>**

<sup>1</sup> Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

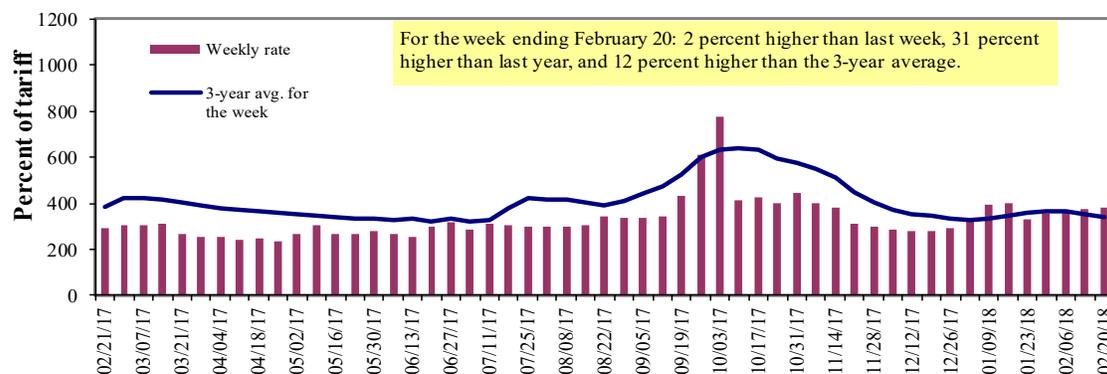
\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

# Barge Transportation

Figure 8

## Illinois River Barge Freight Rate<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate <sup>1</sup>	2/20/2018	-	-	380	293	325	325	220
	2/13/2018	-	-	373	273	303	303	219
\$/ton	2/20/2018	-	-	17.63	11.69	15.24	13.13	6.91
	2/13/2018	-	-	17.31	10.89	14.21	12.24	6.88
<b>Current week % change from the same week:</b>								
	Last year	-	-	31	38	53	40	24
	3-year avg. <sup>2</sup>	-	-	12	24	21	20	11
Rate <sup>1</sup>	March	-	375	363	268	300	300	218
	May	375	330	325	253	268	268	210

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

### Benchmark tariff rates

#### Calculating barge rate per ton:

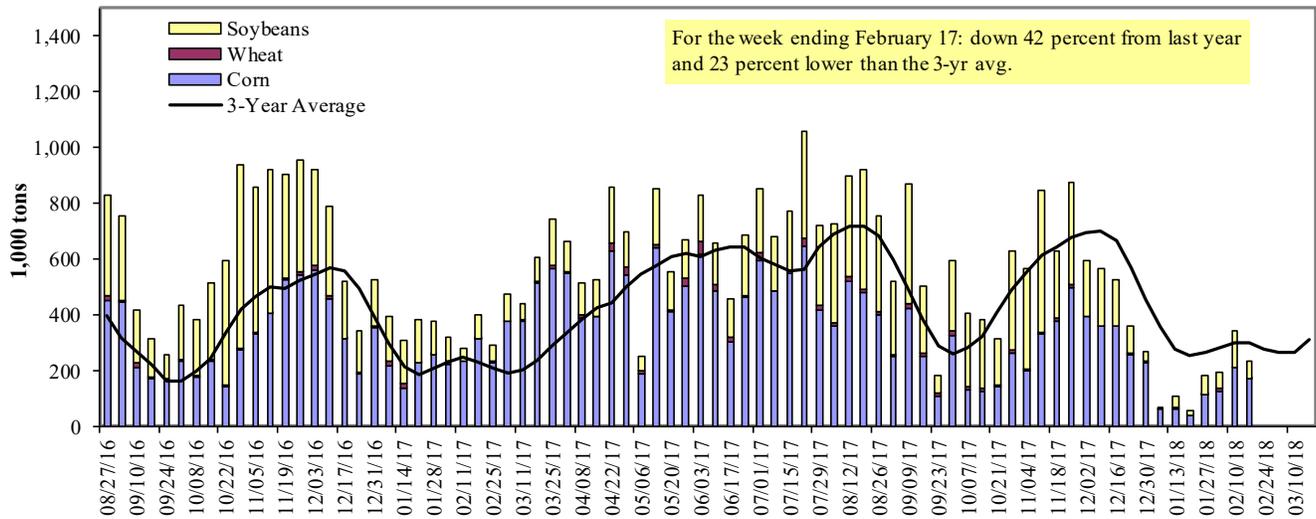
(Rate \* 1976 tariff benchmark rate per ton)/100

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



Figure 10

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



<sup>1</sup> The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

**Barge Grain Movements (1,000 tons)**

For the week ending 02/17/2018	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	11	0	0	0	11
Alton, IL (L26)	173	5	66	0	244
Granite City, IL (L27)	168	5	58	0	231
<b>Illinois River (L8)</b>	88	5	48	0	141
<b>Ohio River (L52)</b>	125	5	130	4	264
<b>Arkansas River (L1)</b>	3	24	49	0	76
Weekly total - 2018	297	34	237	4	571
Weekly total - 2017	457	44	240	0	741
2018 YTD <sup>1</sup>	1,473	178	1,850	23	3,524
2017 YTD	2,406	235	2,219	108	4,969
2018 as % of 2017 YTD	61	76	83	21	71
Last 4 weeks as % of 2017 <sup>2</sup>	72	103	109	44	88
<b>Total 2017</b>	<b>22,242</b>	<b>2,210</b>	<b>16,123</b>	<b>360</b>	<b>40,936</b>

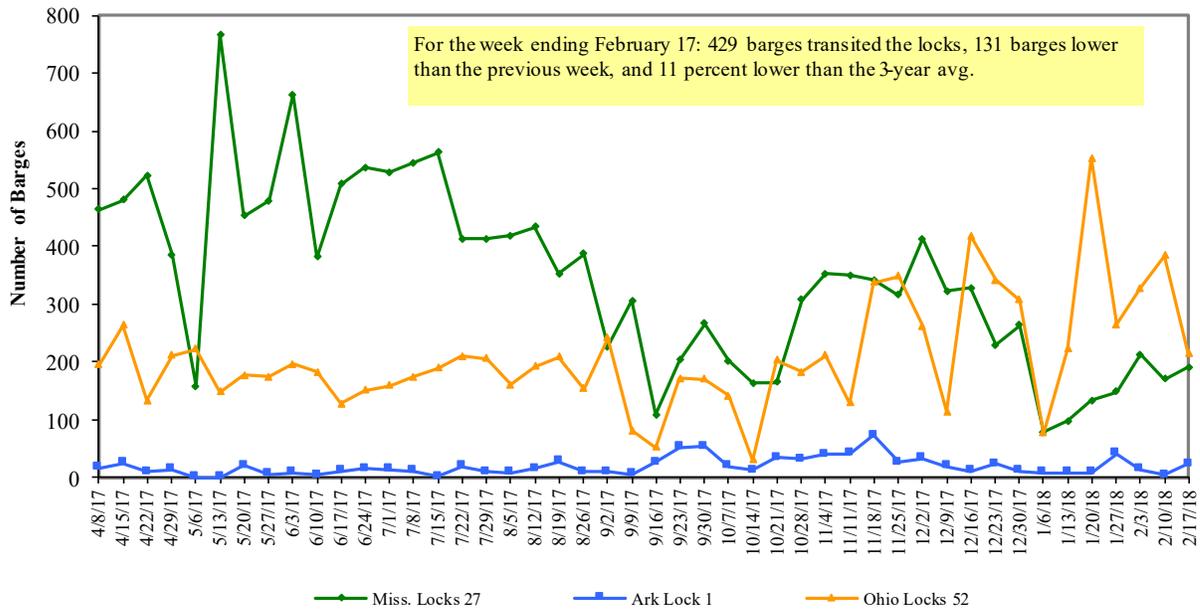
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

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

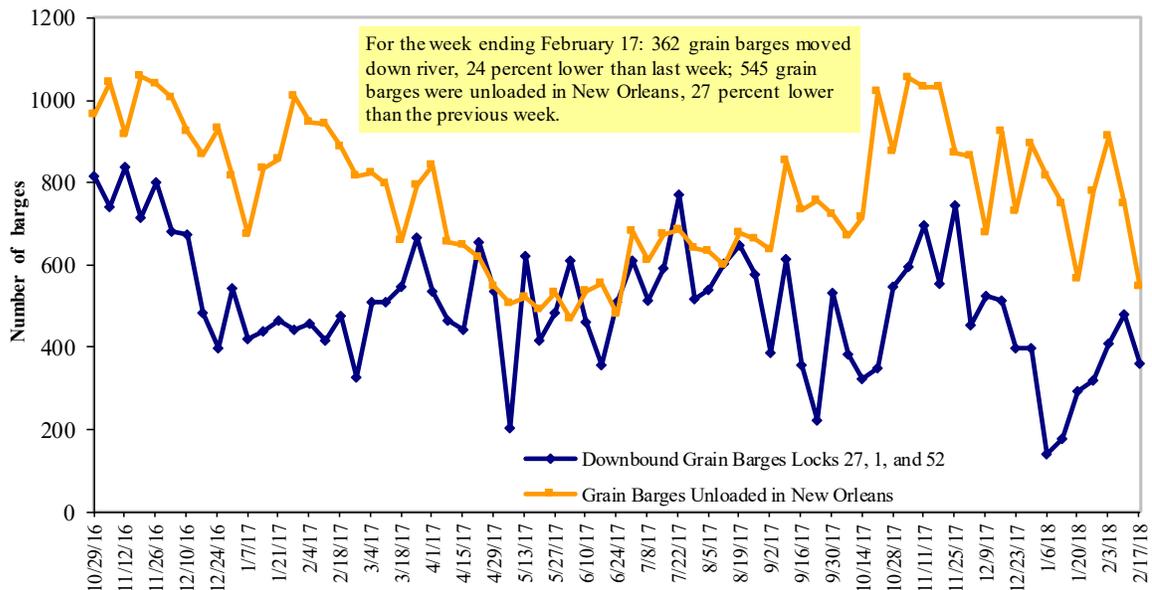
Source: U.S. Army Corps of Engineers

**Figure 11**  
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52**



Source: U.S. Army Corps of Engineers

**Figure 12**  
**Grain Barges for Export in New Orleans Region**



Source: U.S. Army Corps of Engineers and GIPSA

# Truck Transportation

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

Table 11

## Retail on-Highway Diesel Prices, Week Ending 2/19/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.082	-0.029	0.454
	New England	3.129	-0.025	0.471
	Central Atlantic	3.274	-0.032	0.504
	Lower Atlantic	2.939	-0.027	0.418
II	Midwest <sup>2</sup>	2.970	-0.050	0.475
III	Gulf Coast <sup>3</sup>	2.818	-0.033	0.385
IV	Rocky Mountain	2.953	-0.019	0.405
V	West Coast	3.399	-0.033	0.523
	West Coast less California	3.072	-0.035	0.305
	California	3.658	-0.031	0.692
Total	U.S.	3.027	-0.036	0.455

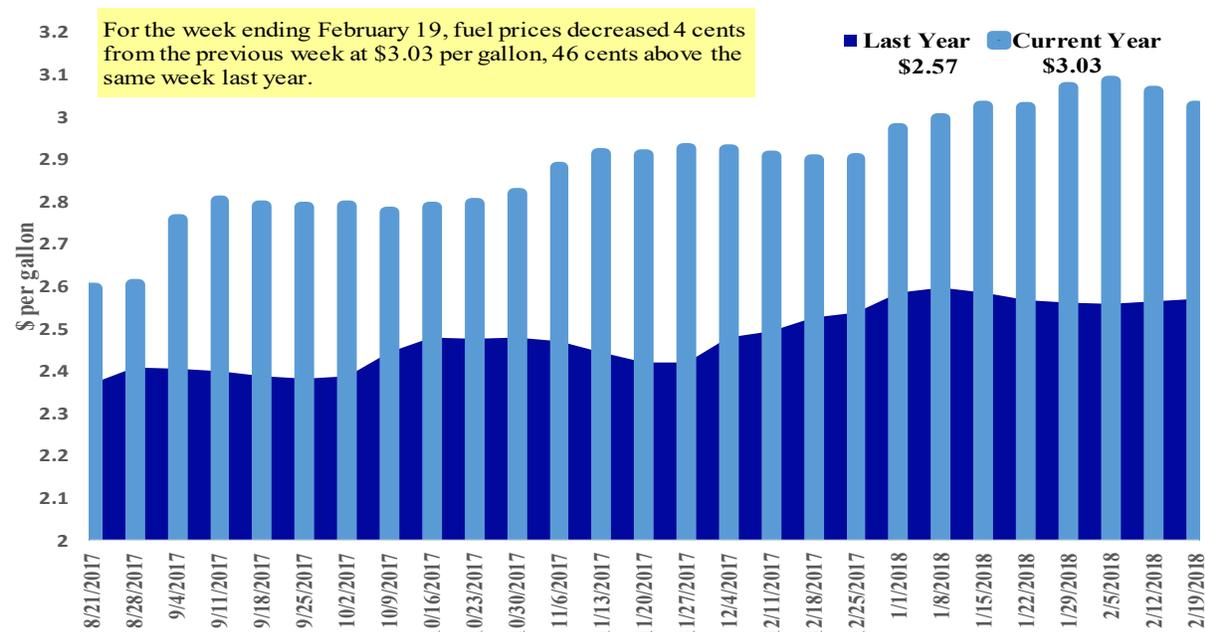
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>Same as South Central

Source: Energy Information Administration/U.S. Department of Energy ([www.eia.doe.gov](http://www.eia.doe.gov))

Figure 13

## Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

# Grain Exports

Table 12

## U.S. Export Balances and Cumulative Exports (1,000 metric tons)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
2/8/2018	1,797	689	1,423	933	57	4,899	20,359	8,773	34,031
This week year ago	2,263	648	2,527	1,435	139	7,011	19,920	10,210	37,140
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2017/18 YTD	6,737	1,456	4,098	3,653	272	16,216	15,637	36,050	67,903
2016/17 YTD	7,395	1,443	5,047	2,774	265	16,924	22,053	41,529	80,506
YTD 2017/18 as % of 2016/17	91	101	81	132	103	96	71	87	84
Last 4 wks as % of same period 2016/17	86	108	57	68	47	73	95	97	92
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,486

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

<sup>2</sup> Shipped export sales to date; new marketing year now in effect for wheat, corn, and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA ([www.fas.usda.gov](http://www.fas.usda.gov))

Table 13

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

For the week ending 2/08/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
Mexico	10,596	10,520	1	12,297
Japan	5,955	7,296	(18)	11,450
Korea	1,954	3,434	(43)	4,494
Colombia	2,679	2,815	(5)	4,179
Peru	1,975	2,068	(5)	2,693
<b>Top 5 Importers</b>	<b>23,158</b>	<b>26,133</b>	<b>(11)</b>	<b>35,113</b>
<b>Total US corn export sales</b>	<b>35,996</b>	<b>41,973</b>	<b>(14)</b>	<b>49,308</b>
% of Projected	69%	72%		
Change from prior week <sup>2</sup>	<b>1,975</b>	<b>784</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	64%	62%		71%
<b>USDA forecast, February 2018</b>	<b>52,163</b>	<b>58,346</b>	<b>(11)</b>	
<b>Corn Use for Ethanol USDA forecast, February 2018</b>	<b>140,335</b>	<b>138,151</b>	<b>2</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports for 2016/17 - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year (MY) = Sep 1 - Aug 31.

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

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

Table 14

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

For the week ending 2/08/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	26,563	33,776	(21)	31,881
Mexico	2,791	2,626	6	3,452
Indonesia	1,226	1,259	(3)	1,987
Japan	1,451	1,552	(6)	2,067
Netherlands	916	1,029	(11)	2,098
<b>Top 5 importers</b>	<b>32,946</b>	<b>40,242</b>	<b>(18)</b>	<b>41,486</b>
<b>Total US soybean export sales</b>	<b>44,823</b>	<b>51,738</b>	<b>(13)</b>	<b>52,919</b>
% of Projected	78%	87%		
Change from prior week <sup>2</sup>	561	890		
<b>Top 5 importers' share of U.S. soybean export sales</b>	74%	78%		<b>78%</b>
<b>USDA forecast, February 2018</b>	<b>57,221</b>	<b>59,237</b>	<b>97</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports for 2016/17 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--

http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales

<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

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

For the week ending 2/08/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,494	2,167	15	2,620
Mexico	2,660	2,571	3	2,743
Philippines	2,272	2,213	3	2,395
Brazil	111	1,126	(90)	862
Nigeria	1,051	1,259	(17)	1,254
Korea	1,314	1,181	11	1,104
China	890	1,061	(16)	1,623
Taiwan	1,008	889	13	768
Indonesia	1,163	848	37	726
Colombia	558	687	(19)	635
<b>Top 10 importers</b>	<b>13,522</b>	<b>14,001</b>	<b>(3)</b>	<b>14,729</b>
<b>Total US wheat export sales</b>	<b>21,115</b>	<b>23,935</b>	<b>(12)</b>	<b>22,804</b>
% of Projected	82%	83%		
Change from prior week <sup>2</sup>	311	525		
<b>Top 10 importers' share of U.S. wheat export sales</b>	64%	58%		<b>65%</b>
<b>USDA forecast, February 2018</b>	<b>25,886</b>	<b>28,747</b>	<b>(10)</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports for 2016/17 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--

http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales

<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 16

## Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port Regions	For the Week Ending 02/15/18	Previous Week <sup>1</sup>	Current Week as % of Previous	2018 YTD	2017 YTD	2018 YTD as % of 2017 YTD	Last 4-weeks as % of:		2017 Total
							Last Year	Prior 3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	180	300	60	1,546	1,522	102	91	106	14,805
Corn	301	221	136	1,638	1,408	116	166	259	10,928
Soybeans	210	338	62	2,290	2,216	103	91	75	13,246
<b>Total</b>	<b>692</b>	<b>859</b>	<b>81</b>	<b>5,475</b>	<b>5,146</b>	<b>106</b>	<b>108</b>	<b>112</b>	<b>38,978</b>
<b>Mississippi Gulf</b>									
Wheat	124	84	147	562	556	101	85	103	4,198
Corn	491	451	109	3,011	4,584	66	65	87	28,690
Soybeans	618	844	73	5,101	6,039	84	86	84	32,911
<b>Total</b>	<b>1,232</b>	<b>1,379</b>	<b>89</b>	<b>8,673</b>	<b>11,178</b>	<b>78</b>	<b>76</b>	<b>86</b>	<b>65,800</b>
<b>Texas Gulf</b>									
Wheat	80	111	72	655	594	110	152	192	6,354
Corn	0	32	0	63	151	42	48	42	733
Soybeans	0	0	n/a	0	0	n/a	n/a	0	292
<b>Total</b>	<b>80</b>	<b>142</b>	<b>56</b>	<b>718</b>	<b>744</b>	<b>96</b>	<b>135</b>	<b>145</b>	<b>7,379</b>
<b>Interior</b>									
Wheat	61	32	189	226	260	87	124	164	1,727
Corn	130	127	102	902	886	102	90	106	8,733
Soybeans	112	119	95	728	776	94	93	109	5,496
<b>Total</b>	<b>303</b>	<b>278</b>	<b>109</b>	<b>1,856</b>	<b>1,921</b>	<b>97</b>	<b>95</b>	<b>113</b>	<b>15,956</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	19	0	n/a	n/a	n/a	711
Corn	0	0	n/a	0	0	n/a	n/a	n/a	192
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	890
<b>Total</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>19</b>	<b>0</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>1,793</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	0	36	0	0	0	46
Corn	0	0	n/a	0	0	n/a	n/a	n/a	32
Soybeans	70	108	65	344	492	70	78	71	1,996
<b>Total</b>	<b>70</b>	<b>108</b>	<b>65</b>	<b>344</b>	<b>527</b>	<b>65</b>	<b>70</b>	<b>64</b>	<b>2,075</b>
<b>U.S. total from ports</b>									
Wheat	445	526	85	3,008	2,967	101	101	121	27,841
Corn	922	831	111	5,613	7,028	80	84	112	49,308
Soybeans	1,010	1,409	72	8,464	9,522	89	87	82	54,831
<b>Total</b>	<b>2,377</b>	<b>2,767</b>	<b>86</b>	<b>17,085</b>	<b>19,517</b>	<b>88</b>	<b>88</b>	<b>97</b>	<b>131,980</b>

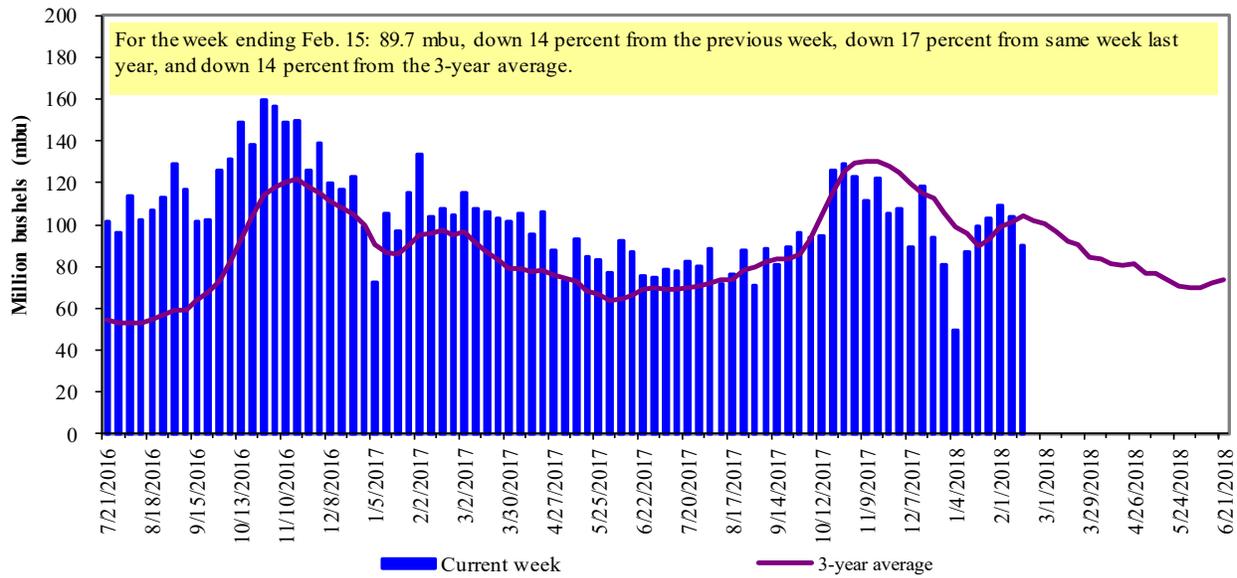
<sup>1</sup>Data includes revisions from prior weeks; some regional and U.S. totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

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

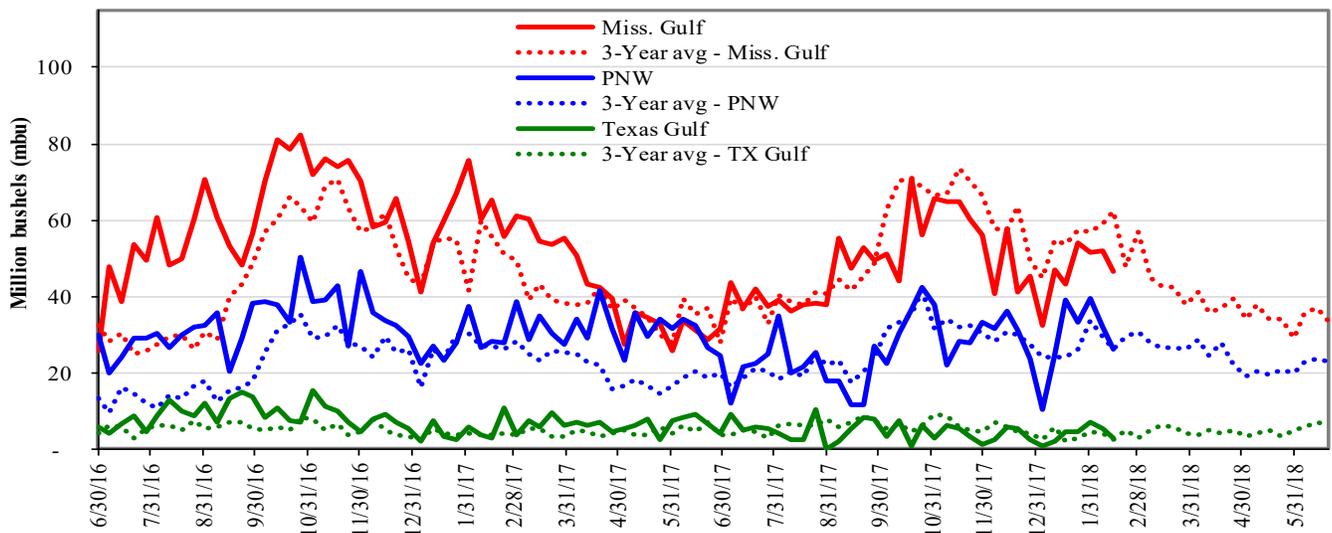


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



Week ending 02/15/18 inspections (mbu):		Percent change from:				
Mississippi Gulf:	46.6	Last Week:	MS Gulf	TX	U.S. Gulf	PNW
PNW:	26.2	Last Year (same	down 10	down 44	down 13	down 18
Texas Gulf:	2.9	3-yr avg. (4-wk. mov.	down 29	up 8	down 27	down 8
			down 21	down 13	down 21	down 9

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

# Ocean Transportation

Table 17

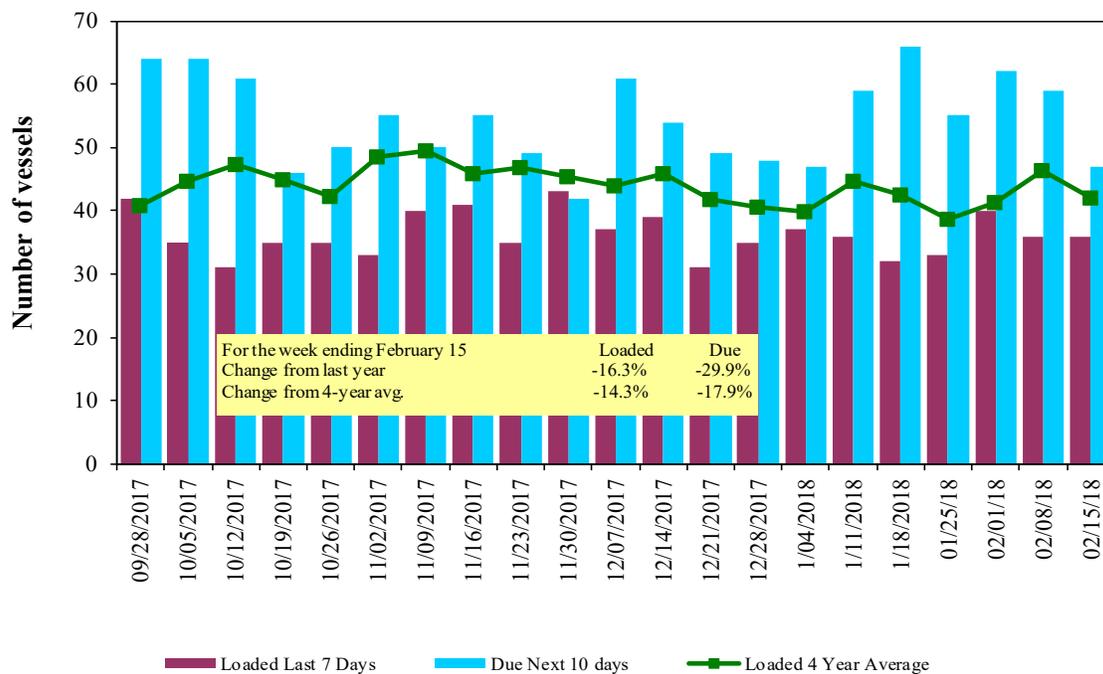
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
2/15/2018	57	36	47	23
2/8/2018	56	36	59	11
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

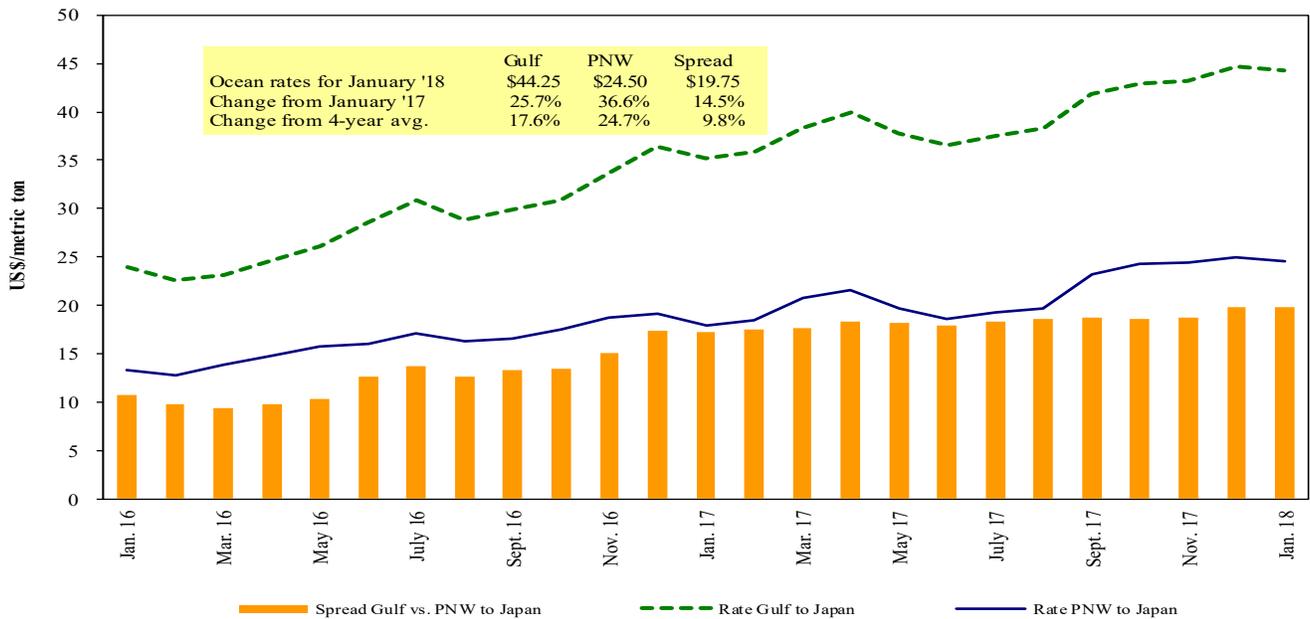
**U.S. Gulf Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA  
<sup>1</sup>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 02/17/2018**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 1/10	60,000	45.50
U.S. Gulf	China	Heavy Grain	Dec 15/20	60,000	44.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	43.25
U.S. Gulf	China	Heavy Grain	Nov 27/Dec 5	47,700	40.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	Djibouti	Sorghum	Feb 26/Mar	8,720	107.85*
PNW	Bangladesh	Wheat	Apr 6/16	43,500	46.61*
PNW	China	Heavy Grain	Dec 23/30	60,000	22.25
PNW	China	Heavy Grain	Dec 15/24	60,000	23.75
PNW	South Korea	Heavy Grain	Dec 14/20	60,000	24.00
Brazil	China	Heavy Grain	Mar 1/10	66,000	30.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	31.90
Brazil	South Korea	Heavy Grain	Nov 22/29	63,000	33.25
France	Morocco	Heavy Grain	Jan 6/12	30,000	15.00
Portugal	China	Heavy Grain	Feb 10	65,000	38.00

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

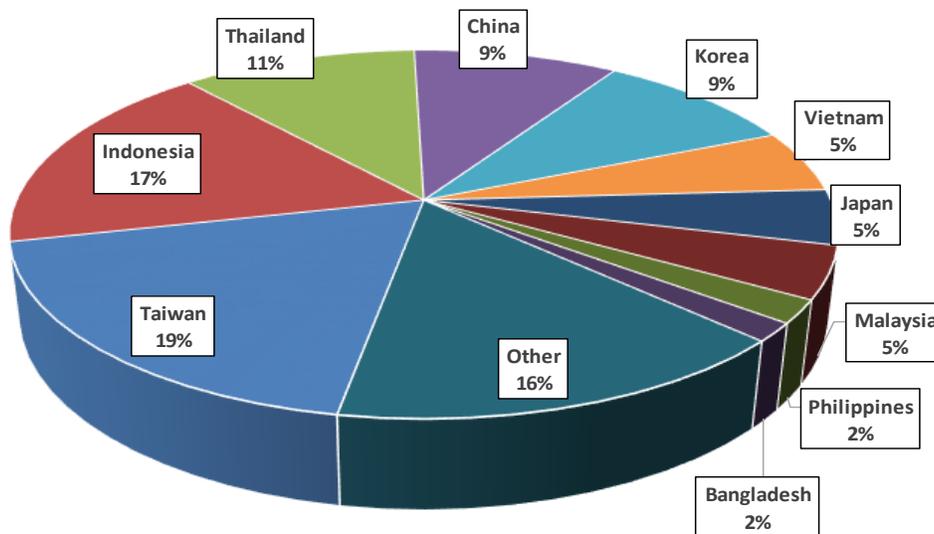
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2016, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2016 went to Asia, of which 10 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, January-December 2017**

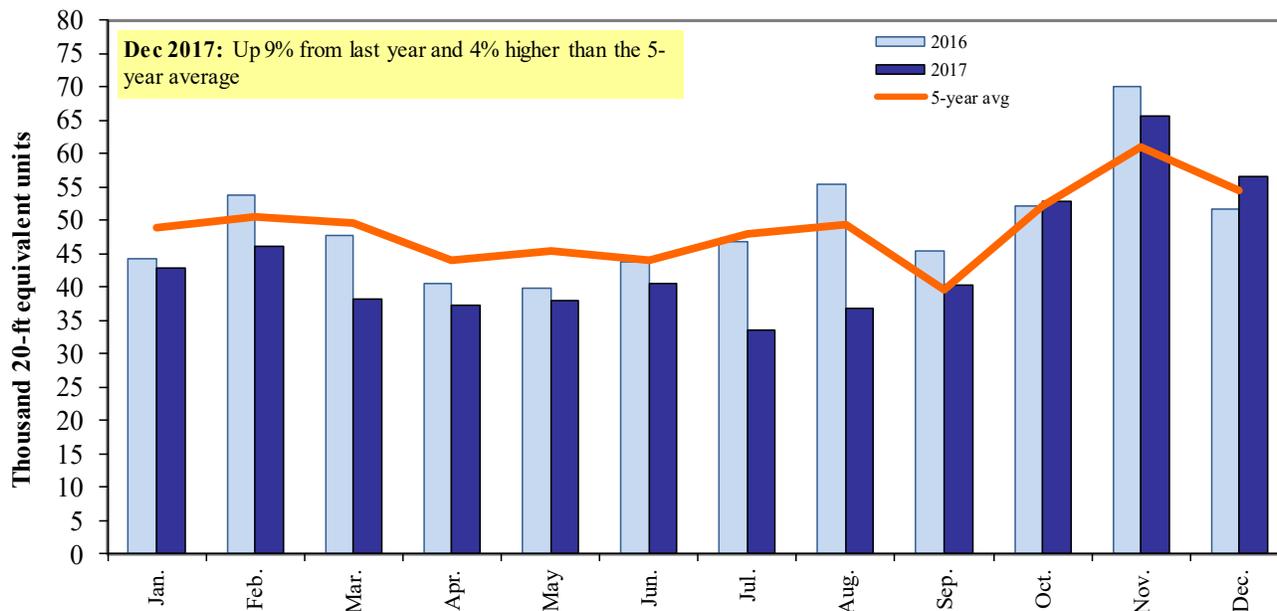


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 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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