



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

www.ams.usda.gov/GTR

Contact Us

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## WEEKLY HIGHLIGHTS

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#### Grain Inspections Decrease Slightly

For the week ending March 16, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.74 million metric tons (mmt), down 3 percent from the previous week, but up 32 percent from the same time last year, and 20 percent above the 3-year average. Although wheat and soybeans increased from the previous week, the increases could not offset the decrease in total grain inspected. Corn inspections decreased 15 percent from the past week, but continued above this week's 3-year average by 36 percent. Mississippi Gulf inspections decreased 9 percent from the previous week, but Pacific Northwest (PNW) increased 23 percent. Week to week outstanding export sales (unshipped) increased notably for corn, wheat, and soybeans.

#### Mild Winter Conditions Resulting in Normal Navigation Conditions

Normal navigation conditions are reported on the Mississippi River and its major tributaries. According to USDA's March 21 *Weekly Weather and Crop Bulletin*, a majority of the Midwest experienced a relatively mild winter with occasional periods of record warmth accompanied by brief episodes of rain or snow. This has resulted in generally normal navigation conditions throughout the system. There have been relatively few disruptions due to weather, however, occasional fog has been a limiting factor to navigation throughout the season. As of March 21, barge freight rates were 26 to 35 percent below the 3-year average, but 5 to 30 percent above last year at this time. With the mild winter, an early opening of the northern portion of the Upper Mississippi River has expanded the range of navigable river miles compared to this same period last year, and has kept barge rates above last year's levels.

#### Some PNW Rail Service Improvements but More Precipitation Expected

Class I railroads appear to have recovered some from weather-related service disruptions in the PNW, though there is still a significant backlog of grain cars. In recent weeks, BNSF, Union Pacific (UP), and Canadian Pacific (CP) have all dealt with severe winter conditions, such as snowfall, track washouts, and landslides that have disrupted grain traffic, with areas in Washington, Idaho, and Montana particularly affected. For the week ending March 15, all three railroads reported reduced backlogs and dwell times compared to the previous week, though grain train speeds were down at BNSF and CP. BSNF stated, "Despite these ongoing service challenges from extreme weather, our operations teams are making progress in relieving congestion and improving operational performance." However, the total backlog for BSNF, UP, and CP is still 4,942 cars above where it was this time last year and more precipitation is expected. According to USDA's March 21 *Weekly Weather and Crop Bulletin*, "Significant precipitation can also be expected in northern and central California (2 to 6 inches)... [and] the Pacific Northwest (2 to 5 inches)," suggesting that grain shippers may continue to face service issues and delays.

#### Snapshots by Sector

##### Export Sales

For the week ending March 9, **unshipped balances** of wheat, corn, and soybeans totaled 32 mmt, up 55 percent from the same time last year. Net weekly **wheat export sales** were .263 mmt, down 33 percent from the previous week. Net **corn export sales** were 1.26 mmt, up 69 percent from the previous week, and net **soybean export sales** were .472 mmt, down 2 percent from the past week.

##### Rail

U.S. Class I railroads originated 24,248 **grain carloads** for the week ending March 11, up 1 percent from the previous week, up 11 percent from last year, and up 15 percent from the 3-year average.

Average April shuttle **secondary railcar** bids/offers per car were \$197 below tariff for the week ending March 16, down \$572 from last week, and \$9 higher than last year. Average secondary non-shuttle railcar bids/offers per car were \$13 above tariff, up \$38 from last week. There were no non-shuttle bids/offers this week last year.

##### Barge

For the week ending March 18, **barge grain movements** totaled 876,544 tons, 3 percent higher than the last week, and up 71 percent from the same period last year.

For the week ending March 18, 547 grain barges **moved down river**, up 7 percent from last week, 657 grain barges were **unloaded in New Orleans**, down 17 percent from the previous week.

##### Ocean

For the week ending March 16, 44 **ocean-going grain vessels** were loaded in the Gulf, 22 percent more than the same period last year. Seventy-three vessels are expected to be loaded within the next 10 days, 43 percent more than the same period last year.

For the week ending March 16, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$38.50 per metric ton, 1 percent less than the previous week. The cost of shipping from the PNW to Japan was \$21.00 per metric ton, 1 percent less than the previous week.

##### Fuel

During the week ending March 20, average **diesel fuel prices** decreased 2 cents from previous week at \$2.54 per gallon, 42 cents higher than the same week last year.

## 2016 Grain Export Transportation Demand and Outlook for 2017

### 2016 Synopsis

Following a brief slowdown in 2015, 2016 was a remarkable year for United States transportation demand for grain exports across all modes. In addition to the increase in total grain inspected for exports at all ports, there were also increases—compared to the previous year and the 3-year average—for other grain transportation categories, such as barge movements, rail grain carloadings, rail deliveries to ports, and ocean-going grain vessel loading activity in the U.S. Gulf and Pacific Northwest (PNW).

In 2016, 43.18 million tons of grain were transported by barges along the Mississippi river to New Orleans for export (figure 1), 22 percent more than 2015. In addition, the weekly barge grain movements along the river exceeded 1 million tons in 13 weeks during the year, compared to just 1 week in 2015 and 3 weeks in 2014.

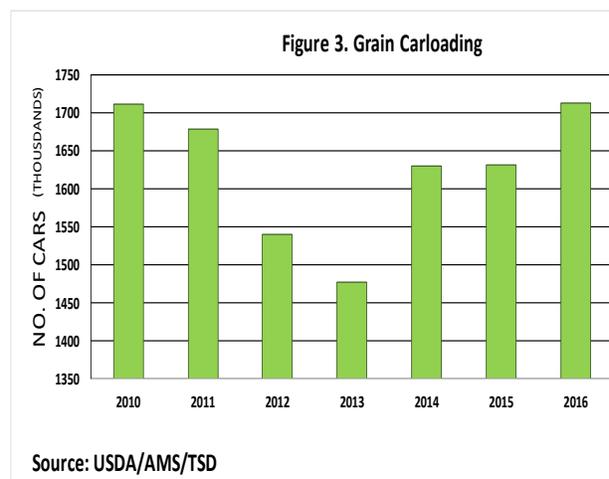
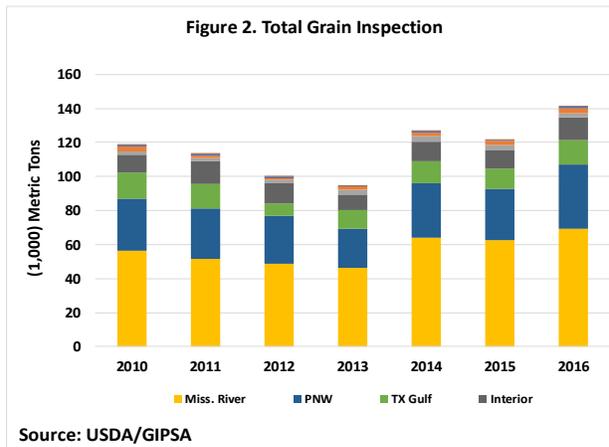
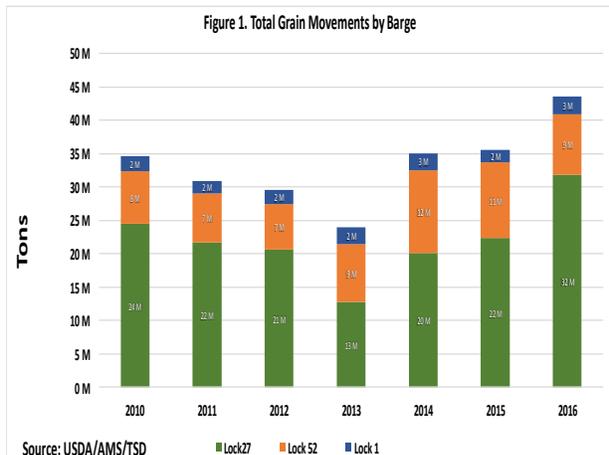
Total grain inspections at about 140 million metric tons (mmt) reached a record high in 2016 (figure 2). Inspections were also up in each of the major export regions.

Rail carloadings of grain (figure 3) and rail deliveries to ports (figure 4) were higher than the previous year and 3-year average. Rail deliveries to ports increased in each of the major export regions.

Grain loading activity for ocean-going vessels was up 5 percent in the U.S. Gulf compared to 2015, and up 9 percent compared to the 3-year average. The total number of ocean-going grain vessels at berth in the PNW in 2016 were 25 and 12 more than the previous year and the 3-year average, respectively.

### Outlook for 2017

Several factors suggest the transportation demand for grain exports for the first half of 2017 will remain strong. For example, USDA's *World Agriculture Supply and Demand Estimates* in March projects record grain production and harvest for this marketing year. December 2016 grain stocks were 10 percent higher than they were at the same time in 2015, implying stocks may move during the first half of the year to make room for this year's harvests (see *Grain Transportation Report (GTR)*, dated January 26, 2017). Outstanding (unshipped) export balances of grain are well above the level for the same period last year.



While sustained growth in agricultural exports reflects an increased demand from increasing global economic growth, a steady increase in the value of the U.S dollar may have a counterbalancing effect on export demand.

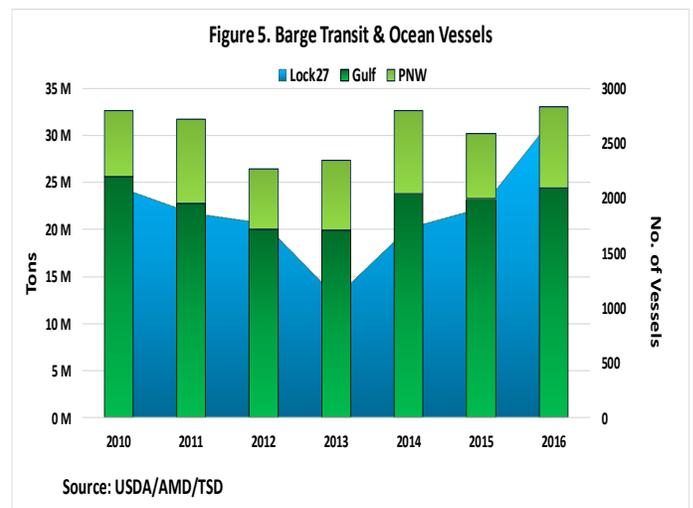
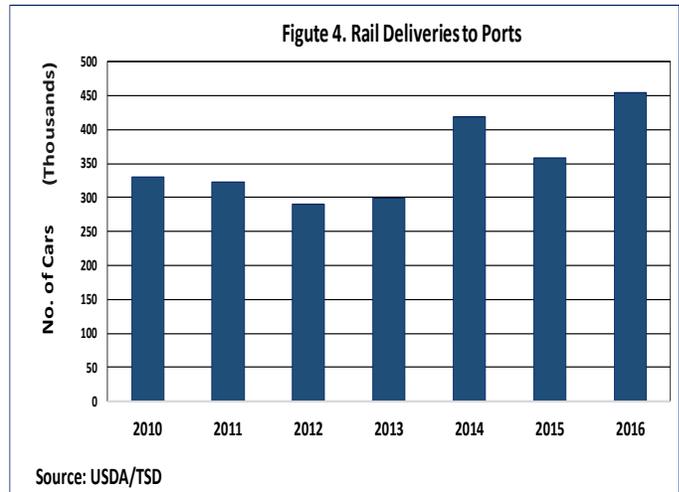
Recent data for the first part of the year also signal transportation demand for export grain will remain strong. So far, the year-to-date (YTD) grain barge movements down the Mississippi river as of March 11 were already 34 percent more than 2016. Average weekly barge movements in February for the major grain crops on the Mississippi River reached the highest level since 2013 (see *GTR*, dated March 2, 2017). As of March 9, YTD grain vessel loading activity in the PNW has doubled compared to 2016, and U.S. Gulf vessel loading was 23 percent more than last year.

Figure 5 shows the historical relationship between grain barge transit on the Mississippi river and ocean-going vessel loading activity. It shows that when total grain movements at Locks No. 27<sup>1</sup> are up, grain vessel-loading activity in the U.S. Gulf also increases and vice-versa. For this year, both grain barge movements down the river and vessel loading activity in the U.S. Gulf have surpassed the YTD levels in 2016.

Similarly, YTD rail deliveries of grain to each of the major export regions are above last year's level. Outstanding (unshipped) export balances of grain are well above the level for the same period last year. As of March 9, YTD total grain inspections are 19 percent above 2016. In addition, ocean freight rates for shipping bulk grains are currently at a moderate level.

In conclusion, transportation demand for export grain has been strong so far in 2017. There are indications these trends may continue at least through the first half of the year. Ocean freight rates for shipping bulk grain have been moderate and there is still excess supply of bulk vessels in the market. Even with the strengthening of the dollar exchange rate value and barring any unforeseen circumstances, 2017 may be a very strong year for transportation demand for export grain.

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<sup>1</sup> Locks No. 27 (Chain of Rocks Locks) is located at the southern end of [Chouteau Island](#) near [St. Louis, Missouri](#), which contains a 1,200-foot main lock and a 600-foot auxiliary lock and are the southernmost locks on the [Mississippi River](#).

# Grain Transportation Indicators

Table 1

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

For the week ending	Truck	Rail		Barge	Ocean		
		Unit	Train	Shuttle		Gulf	Pacific
03/22/17	170	263		202	149	172	149
03/15/17	172	263		228	172	174	151

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

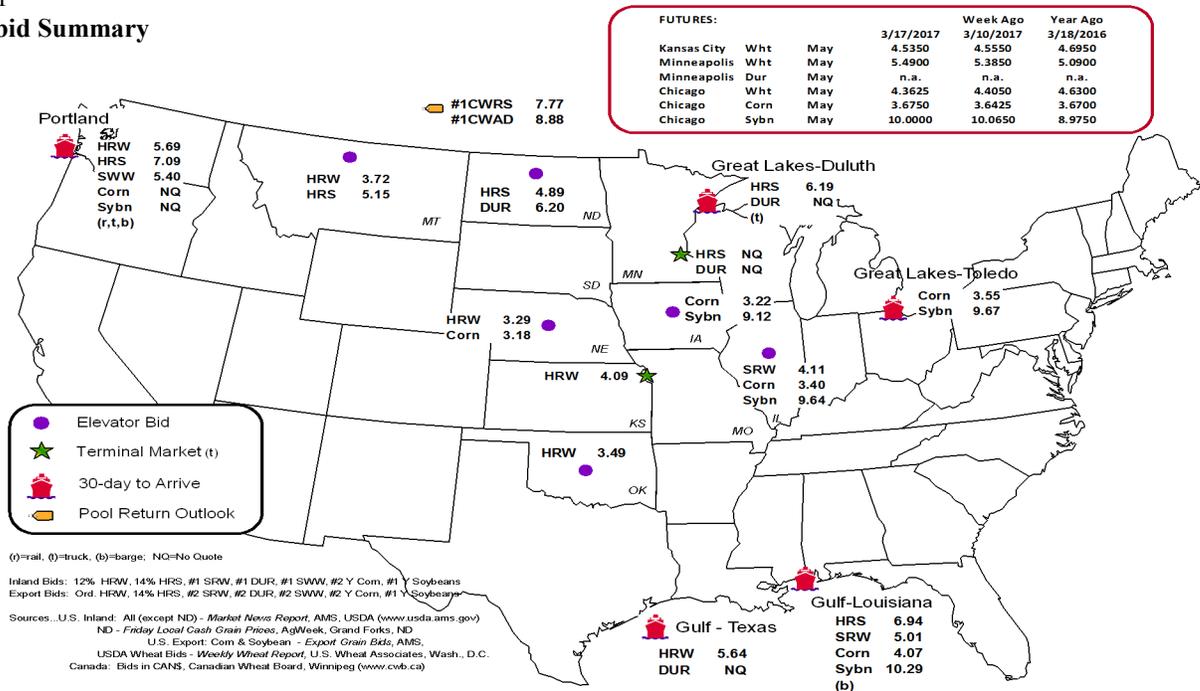
Commodity	Origin--Destination	3/17/2017	3/10/2017
Corn	IL--Gulf	-0.67	-0.66
Corn	NE--Gulf	-0.89	-0.90
Soybean	IA--Gulf	-1.17	-1.15
HRW	KS--Gulf	-1.55	-1.86
HRS	ND--Portland	-2.20	-2.84

Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1  
**Grain bid Summary**



# Rail Transportation

Table 3

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

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
03/15/2017 <sup>p</sup>	798	2,114	6,311	402	9,625	3/11/2017	2,181
03/08/2017 <sup>r</sup>	1,150	2,092	7,601	520	11,363	3/4/2017	1,923
2017 YTD <sup>r</sup>	9,424	21,407	69,844	7,457	108,132	2017 YTD	22,328
2016 YTD <sup>r</sup>	5,072	17,120	65,777	6,879	94,848	2016 YTD	20,044
2017 YTD as % of 2016 YTD	186	125	106	108	114	% change YTD	111
Last 4 weeks as % of 2016 <sup>2</sup>	413	123	112	112	122	Last 4wks % 2016	100
Last 4 weeks as % of 4-year avg. <sup>2</sup>	189	142	133	81	134	Last 4wks % 4 yr	124
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

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

<sup>2</sup> Compared with same 4-weeks in 2016 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 FerroMex.

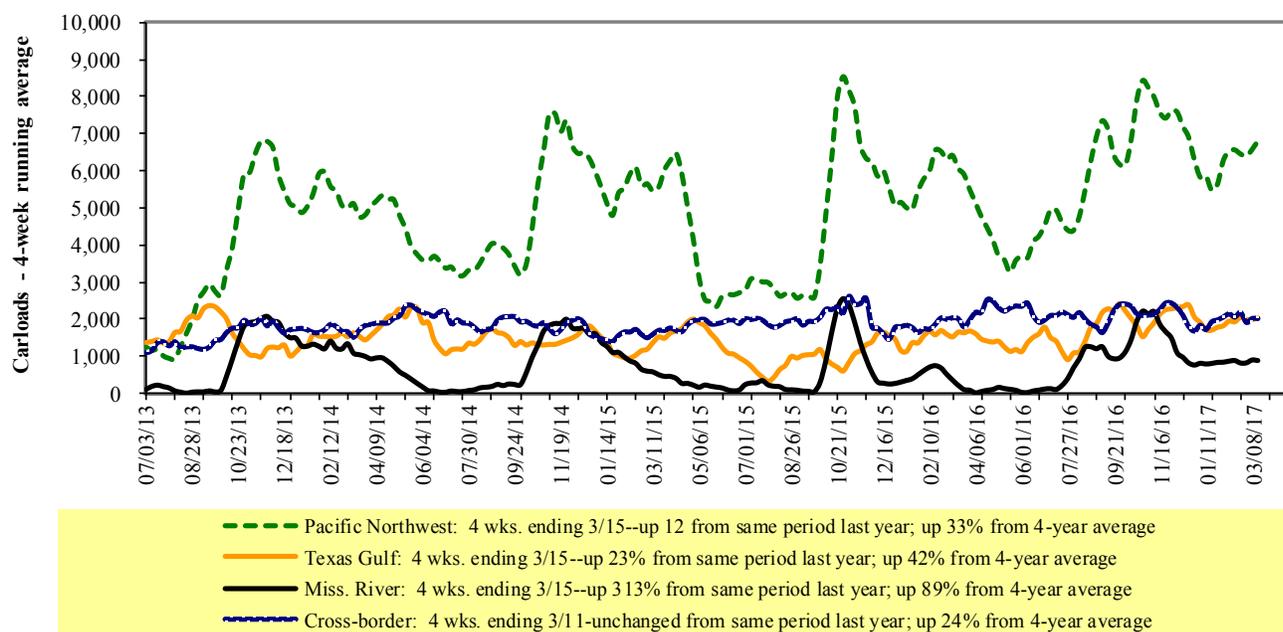
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)**

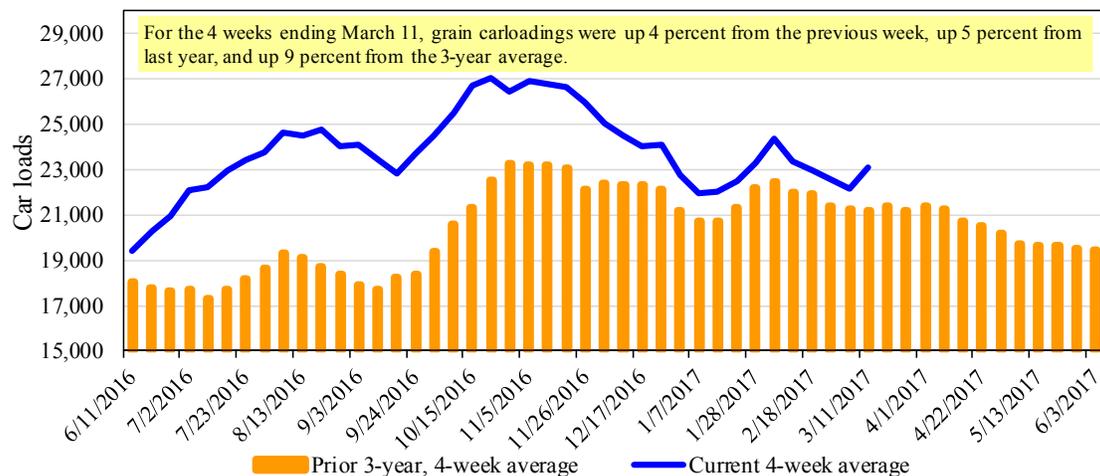
For the week ending: 3/11/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,925	2,718	11,641	853	7,111	24,248	3,484	4,306
This week last year	2,064	2,351	10,927	1,124	5,392	21,858	3,006	4,137
2017 YTD	19,836	27,897	111,845	10,212	61,936	231,726	38,652	41,624
2016 YTD	19,946	28,214	110,673	8,854	53,506	221,193	34,368	42,874
2017 YTD as % of 2016 YTD	99	99	101	115	116	105	112	97
Last 4 weeks as % of 2016*	96	90	103	110	119	105	120	97
Last 4 weeks as % of 3-yr avg.**	101	87	112	109	117	109	106	96
Total 2016	95,179	150,921	590,779	45,246	300,836	1,182,961	194,013	234,738

\*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: 3/16/2017		Delivery period							
		Apr-17	Apr-16	May-17	May-16	Jun-17	Jun-16	Jul-17	Jul-16
BNSF <sup>3</sup>	COT grain units	no bids	no bids	no bids	no bids	no bids	no bids	3	no bids
	COT grain single-car <sup>5</sup>	0	0	1	0	1	0	7	0
UP <sup>4</sup>	GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	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.

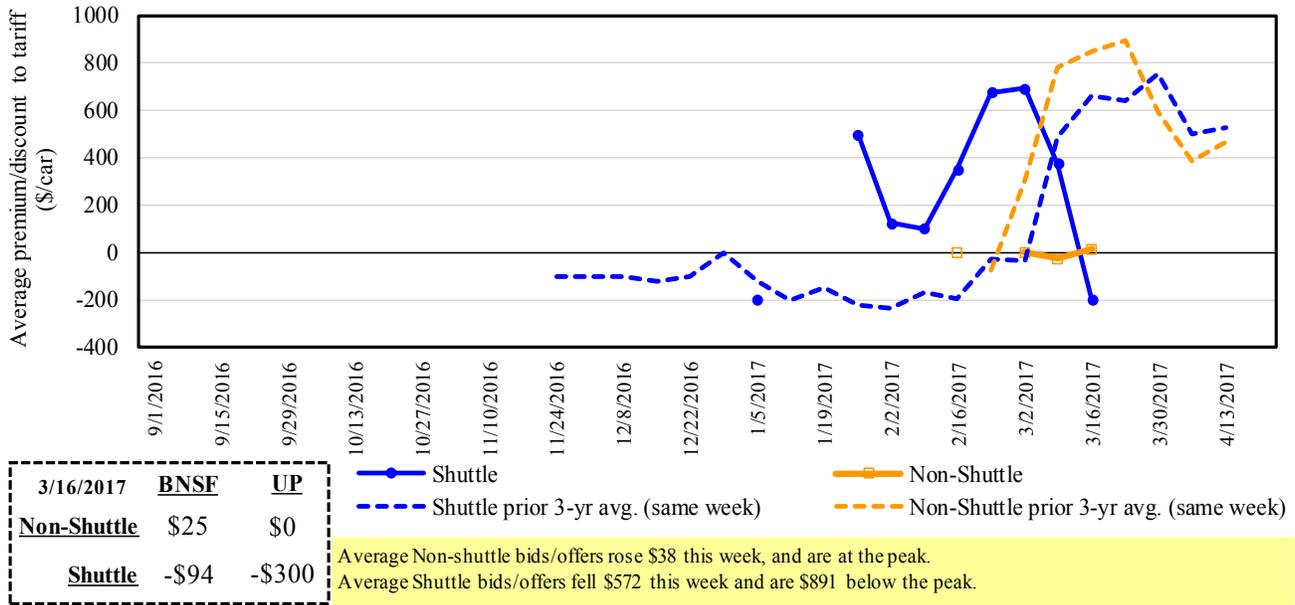
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

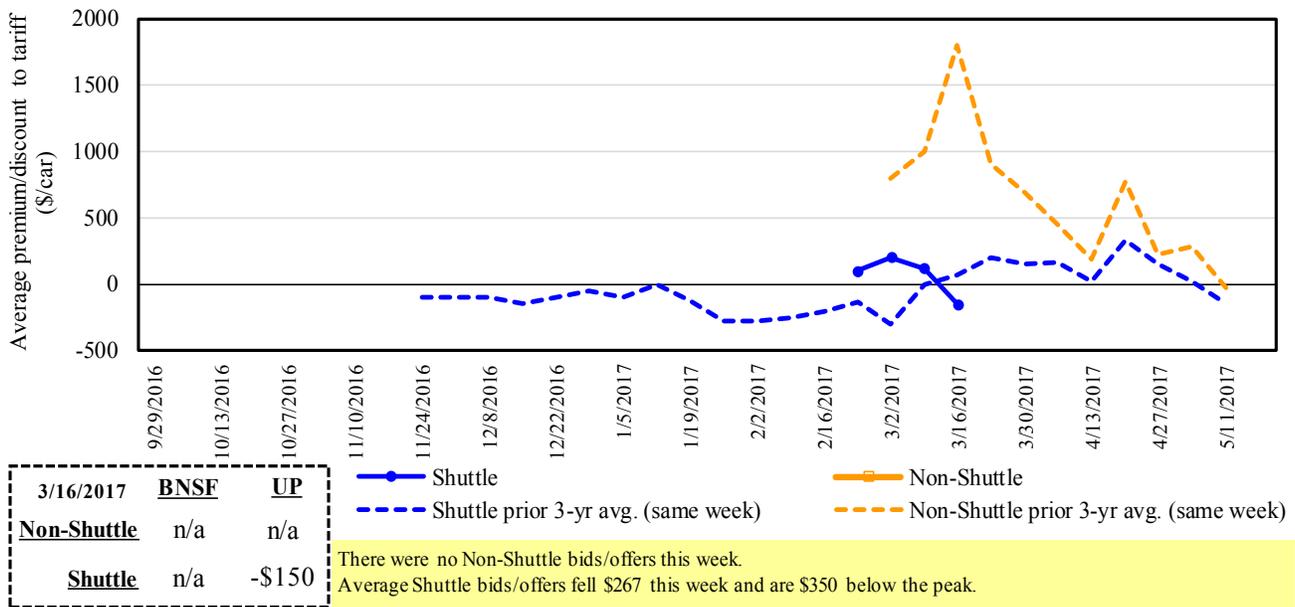
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

**Figure 4**  
**Bids/Offers for Railcars to be Delivered in April 2017, Secondary Market**



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

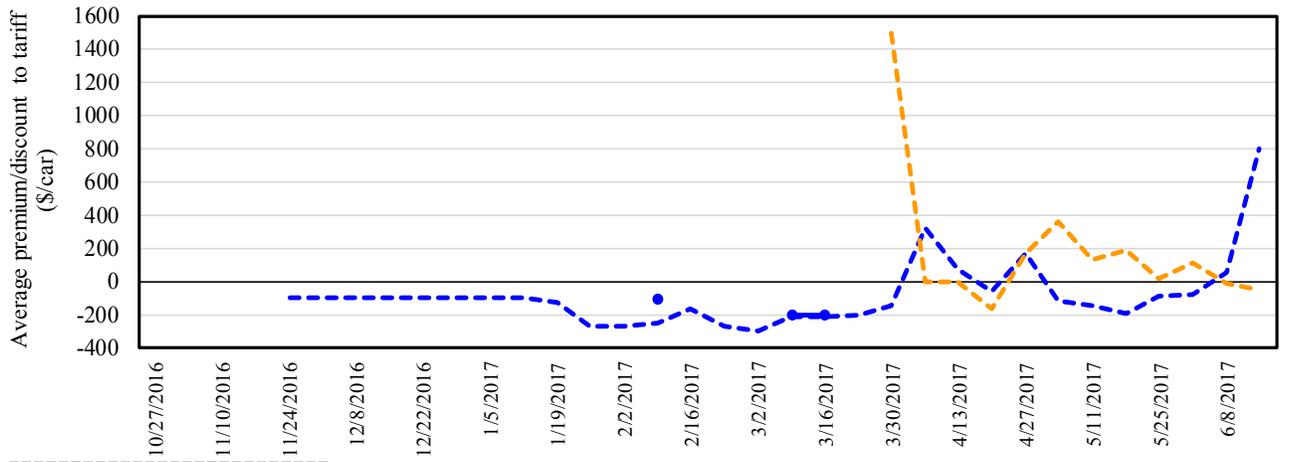
**Figure 5**  
**Bids/Offers for Railcars to be Delivered in May 2017, Secondary Market**



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 June 2017, Secondary Market**



3/16/2017	<b>BNSF</b>	<b>UP</b>	Shuttle	Non-Shuttle
<b>Non-Shuttle</b>	n/a	n/a	Shuttle prior 3-yr avg. (same week)	Non-Shuttle prior 3-yr avg. (same week)
<b>Shuttle</b>	n/a	-\$200	There were no Non-Shuttle bids/offers this week. Average Shuttle bids/offers are unchanged this week and are \$100 below the peak.	

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

Table 6

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

For the week ending:		Delivery period					
		3/16/2017	Apr-17	May-17	Jun-17	Jul-17	Aug-17
Non-shuttle	<b>BNSF-GF</b>	25	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 2016	n/a	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	0	n/a	n/a	n/a	n/a	n/a
	Change from last week	25	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	<b>BNSF-GF</b>	(94)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(469)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	(300)	(150)	(200)	n/a	n/a	n/a
	Change from last week	n/a	n/a	0	n/a	n/a	n/a
	Change from same week 2016	(94)	0	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>**

March, 2017	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>3</sup>
					metric ton	bushel <sup>2</sup>	
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,770	\$51	\$37.94	\$1.03	6
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$9	\$41.23	\$1.12	17
	Wichita, KS	Los Angeles, CA	\$6,950	\$46	\$69.47	\$1.89	2
	Wichita, KS	New Orleans, LA	\$4,408	\$89	\$44.66	\$1.22	6
	Sioux Falls, SD	Galveston-Houston, TX	\$6,686	\$38	\$66.77	\$1.82	5
	Northwest KS	Galveston-Houston, TX	\$4,676	\$98	\$47.40	\$1.29	6
	Amarillo, TX	Los Angeles, CA	\$4,875	\$136	\$49.76	\$1.35	6
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$101	\$37.55	\$0.95	3
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0
	Des Moines, IA	Davenport, IA	\$2,258	\$21	\$22.63	\$0.57	5
	Indianapolis, IN	Atlanta, GA	\$5,191	\$0	\$51.55	\$1.31	4
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	0
Soybeans	Des Moines, IA	Little Rock, AR	\$3,534	\$63	\$35.72	\$0.91	4
	Des Moines, IA	Los Angeles, CA	\$5,202	\$182	\$53.47	\$1.36	7
	Minneapolis, MN	New Orleans, LA	\$3,634	\$74	\$36.83	\$1.00	-6
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	0
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	0
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	0
	Champaign-Urbana, IL	New Orleans, LA	\$4,495	\$101	\$45.64	\$1.24	5
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$26	\$39.52	\$1.08	2
	Wichita, KS	Galveston-Houston, TX	\$4,071	\$21	\$40.63	\$1.11	7
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	\$46	\$56.17	\$1.53	3
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$47	\$59.37	\$1.62	3
	Northwest KS	Portland, OR	\$5,643	\$160	\$57.63	\$1.57	6
	Minneapolis, MN	Portland, OR	\$5,000	\$56	\$50.20	\$1.28	4
Corn	Sioux Falls, SD	Tacoma, WA	\$4,960	\$51	\$49.76	\$1.26	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$101	\$35.57	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$30	\$37.04	\$0.94	6
	Des Moines, IA	Amarillo, TX	\$3,895	\$79	\$39.46	\$1.00	5
	Minneapolis, MN	Tacoma, WA	\$5,000	\$55	\$50.20	\$1.28	4
	Council Bluffs, IA	Stockton, CA	\$4,740	\$57	\$47.64	\$1.21	7
	Sioux Falls, SD	Tacoma, WA	\$5,600	\$51	\$56.12	\$1.53	6
Soybeans	Minneapolis, MN	Portland, OR	\$5,650	\$56	\$56.66	\$1.54	6
	Fargo, ND	Tacoma, WA	\$5,500	\$45	\$55.07	\$1.50	5
	Council Bluffs, IA	New Orleans, LA	\$4,525	\$116	\$46.09	\$1.25	5
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0
	Grand Island, NE	Portland, OR	\$5,460	\$164	\$55.85	\$1.52	5

<sup>1</sup>A unit train refers to shipments of at least 25 cars. Shuttle train rates are 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 & soybeans 60 lbs./bu.

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

\*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8

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

Date: March, 2017			Tariff rate/car <sup>1</sup>	Fuel surcharge per car <sup>2</sup>	Tariff plus surcharge per:		Percent change <sup>4</sup> Y/Y
Commodity	Origin state	Destination region			metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,638	\$70	\$68.54	\$1.86	3
	KS	Guadalajara, JA	\$7,180	\$268	\$76.10	\$2.07	5
	TX	Salinas Victoria, NL	\$4,258	\$43	\$43.94	\$1.19	4
Corn	IA	Guadalajara, JA	\$8,187	\$220	\$85.90	\$2.18	0
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	-3
	NE	Queretaro, QA	\$7,909	\$145	\$82.30	\$2.09	2
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$142	\$75.71	\$1.92	2
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	-1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$232	\$90.72	\$2.47	2
	NE	Guadalajara, JA	\$8,942	\$235	\$93.77	\$2.55	0
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5
	KS	Torreon, CU	\$7,489	\$157	\$78.12	\$2.12	2
Sorghum	NE	Celaya, GJ	\$7,164	\$197	\$75.21	\$1.91	0
	KS	Queretaro, QA	\$7,608	\$87	\$78.62	\$2.00	2
	NE	Salinas Victoria, NL	\$6,213	\$70	\$64.19	\$1.63	2
	NE	Torreon, CU	\$6,607	\$144	\$68.98	\$1.75	1

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

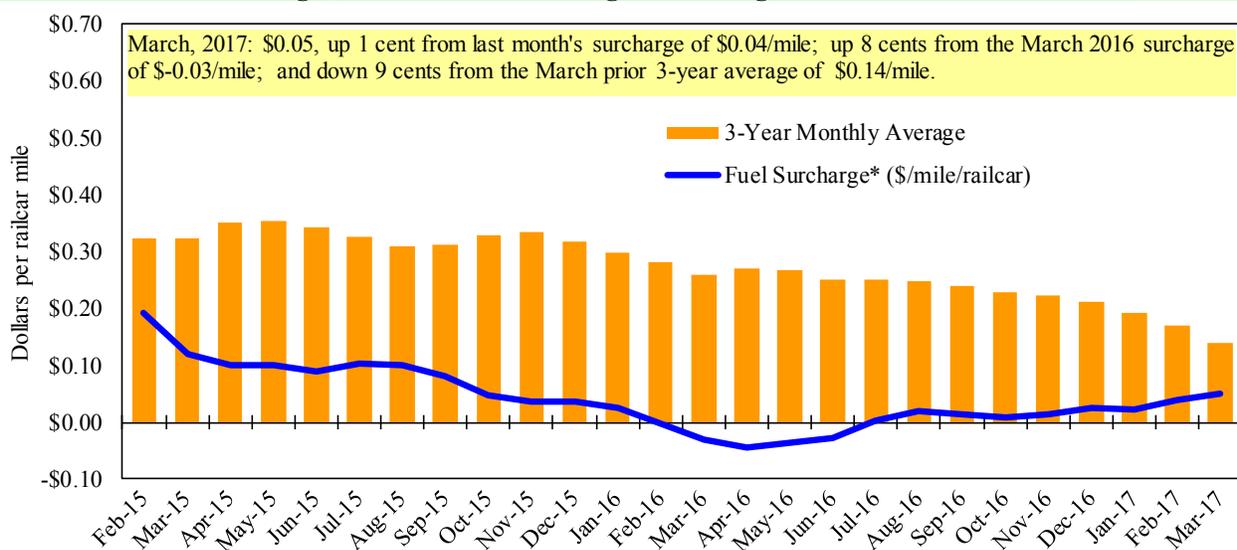
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

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

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

Figure 7

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

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

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

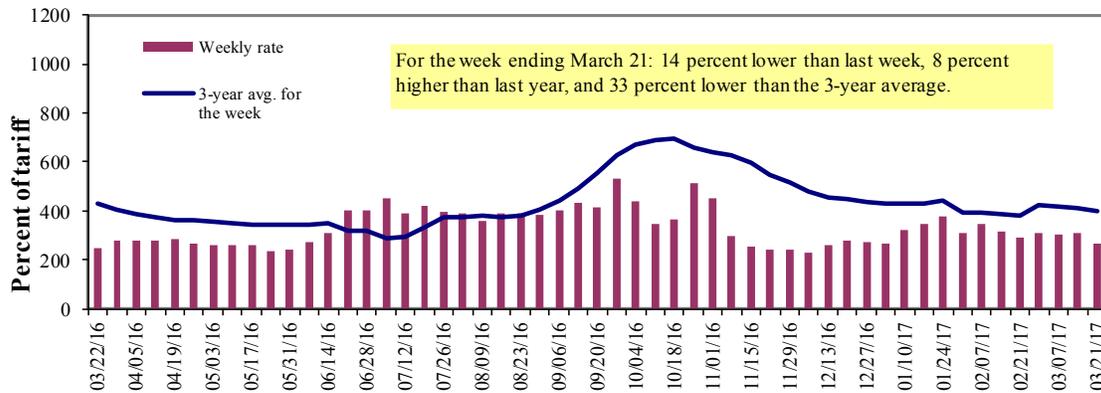
\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

# Barge Transportation

Figure 8

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	3/21/2017	333	283	268	213	243	243	175
	3/14/2017	350	313	310	218	268	268	183
<b>\$/ton</b>	3/21/2017	20.61	15.06	12.44	8.50	11.40	9.82	5.50
	3/14/2017	21.67	16.65	14.38	8.70	12.57	10.83	5.75
<b>Current week % change from the same week:</b>								
	Last year	5	8	8	19	23	30	5
	3-year avg. <sup>2</sup>	-	-	-33	-34	-27	-26	-35
<b>Rate<sup>1</sup></b>	April	328	273	263	195	218	218	163
	June	328	273	263	195	213	213	163

<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 for winter or flooding

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.

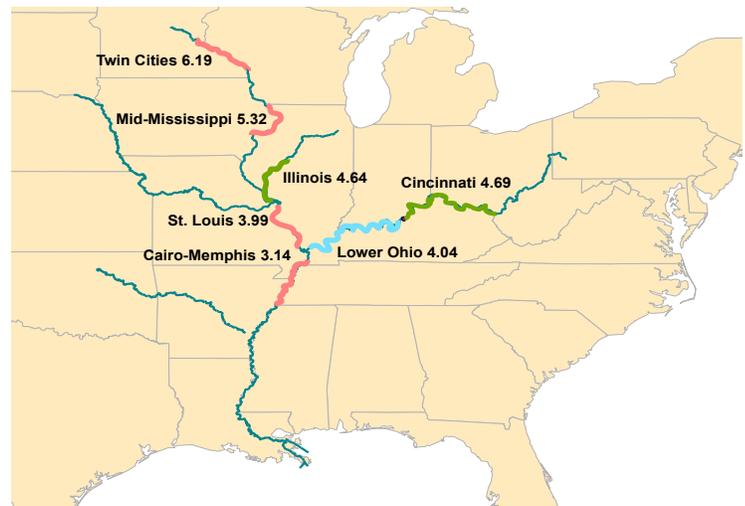
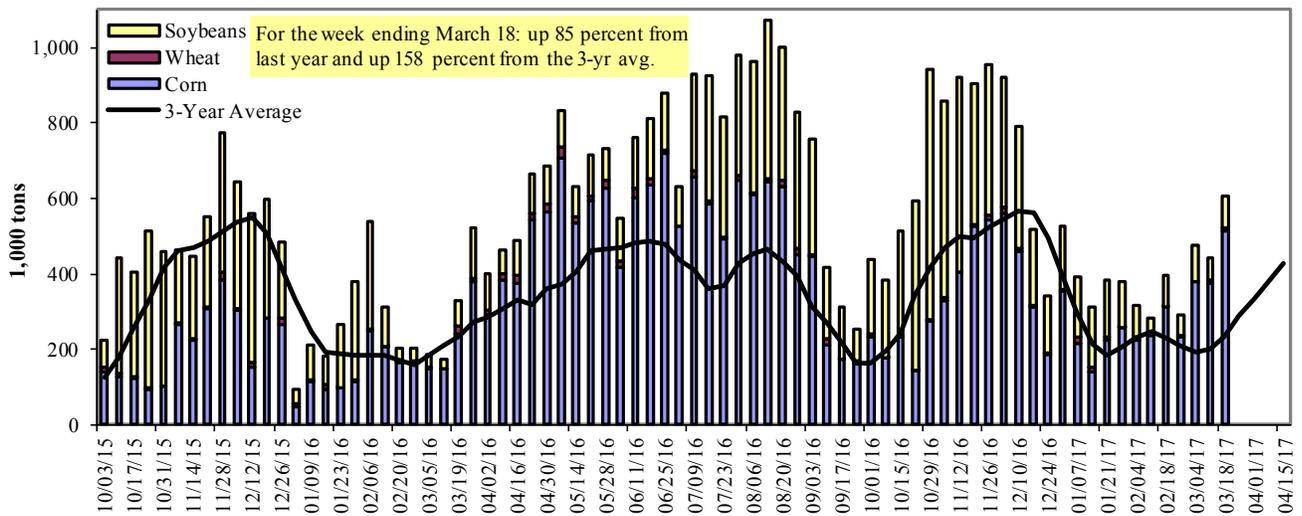


Figure 10

**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 3/18/2017	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	60	0	15	0	76
Winfield, MO (L25)	294	0	47	3	344
Alton, IL (L26)	532	10	91	3	636
Granite City, IL (L27)	512	10	83	3	608
<b>Illinois River (L8)</b>	229	10	39	0	278
<b>Ohio River (L52)</b>	109	12	99	2	222
<b>Arkansas River (L1)</b>	7	17	22	0	46
Weekly total - 2017	628	39	205	5	877
Weekly total - 2016	315	45	141	12	513
2017 YTD <sup>1</sup>	4,458	410	3,050	128	8,048
2016 YTD	3,237	268	2,805	45	6,356
2017 as % of 2016 YTD	138	153	109	283	127
Last 4 weeks as % of 2016 <sup>2</sup>	176	118	149	93	163
Total 2016	24,136	2,030	16,668	344	43,178

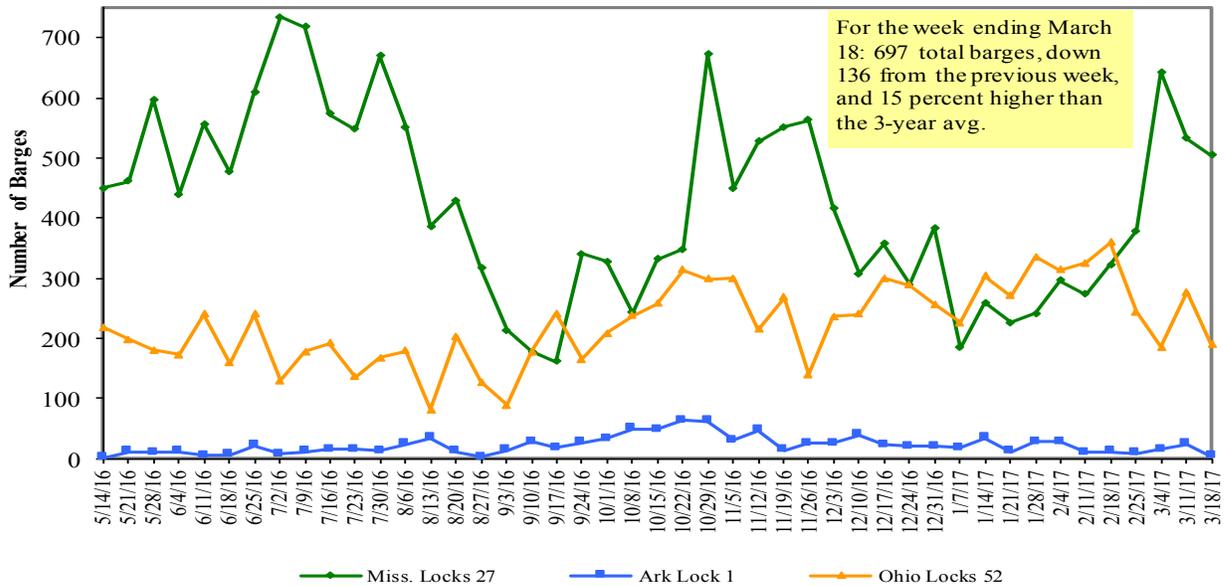
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

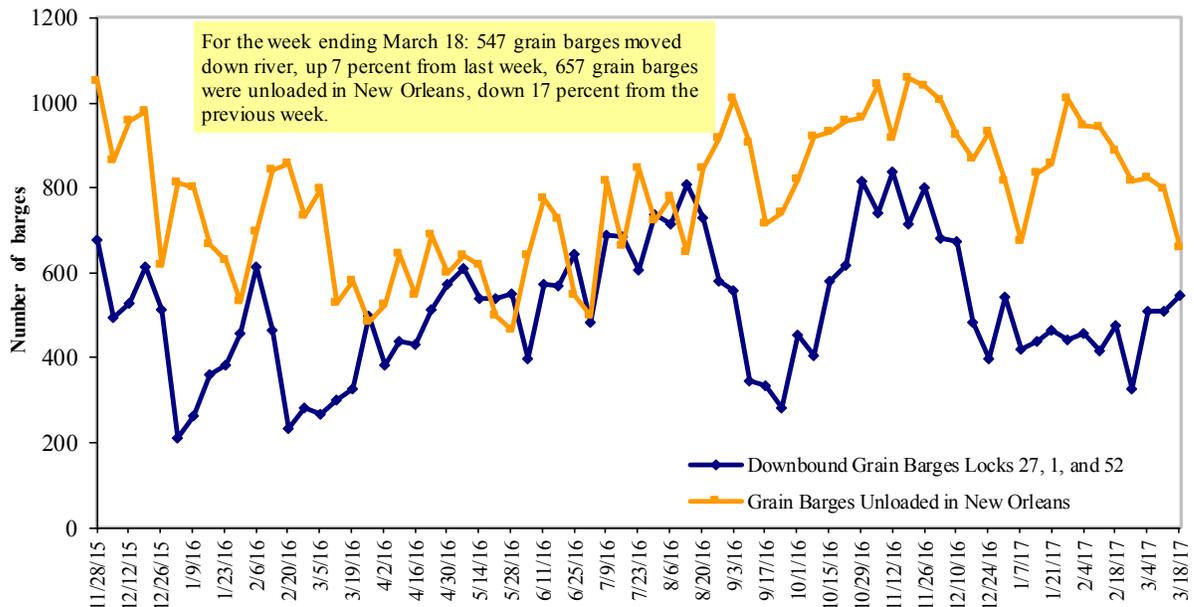
Source: U.S. Army Corps of Engineers

**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<sup>1</sup>, Week Ending 3/20/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.600	-0.017	0.428
	New England	2.622	-0.006	0.394
	Central Atlantic	2.738	-0.023	0.458
	Lower Atlantic	2.498	-0.014	0.419
II	Midwest <sup>2</sup>	2.464	-0.027	0.374
III	Gulf Coast <sup>3</sup>	2.380	-0.039	0.389
IV	Rocky Mountain	2.617	-0.027	0.534
V	West Coast	2.826	-0.020	0.515
	West Coast less California	2.702	-0.034	0.523
	California	2.928	-0.008	0.510
Total	U.S.	2.539	-0.025	0.420

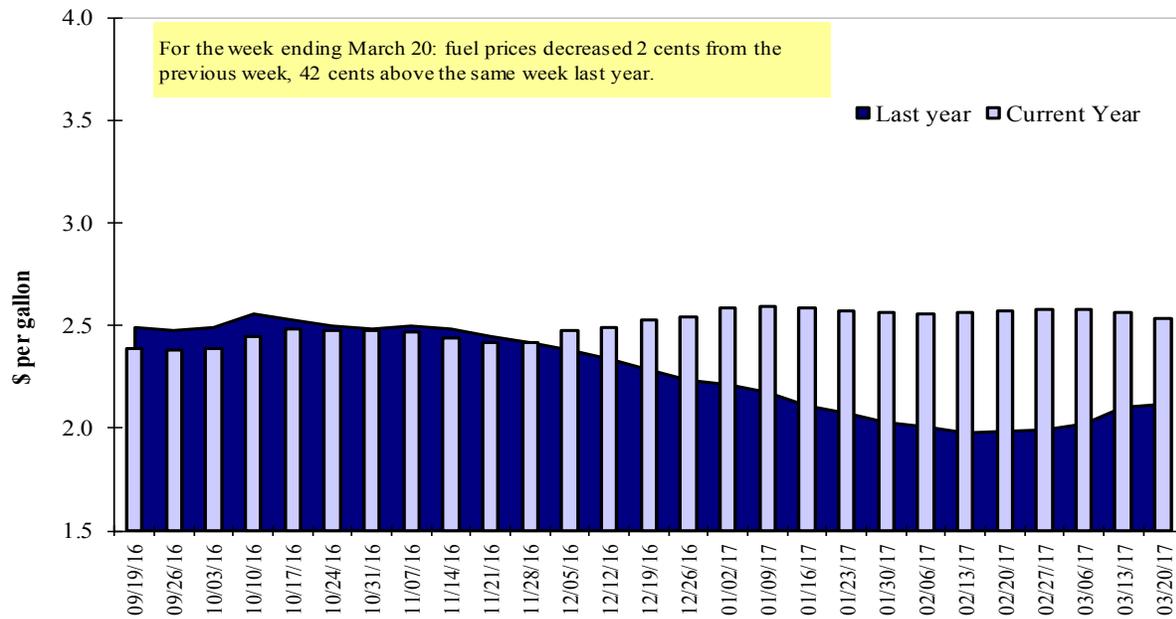
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
3/9/2017	2,087	527	2,138	1,383	96	6,230	17,615	8,135	31,980
This week year ago	981	380	1,442	764	100	3,666	13,348	3,613	20,627
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2016/17 YTD	8,193	1,722	5,828	3,050	344	19,136	27,790	45,325	92,251
2015/16 YTD	4,304	2,601	4,661	2,767	571	14,904	16,701	39,679	71,284
YTD 2016/17 as % of 2015/16	190	66	125	110	60	128	166	114	129
Last 4 wks as % of same period 2015/16	196	133	150	163	97	162	130	212	176
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,487
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155

<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; new marketing year now in effect for 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 3/9/2017	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	11,277	10,381	9	11,204
Japan	8,479	5,356	58	11,284
Korea	3,930	850	362	3,931
Colombia	3,254	3,505	(7)	4,134
Peru	2,150	1,254	71	2,109
<b>Top 5 Importers</b>	<b>29,090</b>	<b>21,346</b>	<b>36</b>	<b>32,662</b>
<b>Total US corn export sales</b>	<b>45,405</b>	<b>30,049</b>	<b>51</b>	<b>46,633</b>
% of Projected	80%	62%		
Change from prior week <sup>2</sup>	<b>1,255</b>	<b>1,227</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	64%	71%		70%
<b>USDA forecast, March 2017</b>	<b>56,616</b>	<b>48,295</b>	<b>17</b>	
<b>Corn Use for Ethanol USDA forecast, March 2017</b>	<b>137,160</b>	<b>132,690</b>	<b>3</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports for 2015/16 - [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 3/9/2017	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	34,564	26,934	28	29,033
Mexico	2,966	2,570	15	3,295
Indonesia	1,496	1,182	27	2,065
Japan	1,696	1,672	1	1,994
Netherlands	1,241	1,353	(8)	1,644
<b>Top 5 importers</b>	<b>41,963</b>	<b>33,711</b>	<b>24</b>	<b>38,032</b>
<b>Total US soybean export sales</b>	<b>53,460</b>	<b>43,292</b>	<b>23</b>	<b>48,389</b>
% of Projected	97%	82%		
Change from prior week <sup>2</sup>	472	624		
<b>Top 5 importers' share of U.S. soybean export sales</b>	78%	78%		<b>79%</b>
<b>USDA forecast, March 2017</b>	<b>55,177</b>	<b>52,752</b>	<b>5</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
http://www.fas.usda.gov/esquery/. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

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

For the week ending 3/9/2017	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,374	2,271	5	2,743
Mexico	2,864	2,110	36	2,660
Philippines	2,362	1,934	22	2,156
Brazil	1,156	386	200	2,076
Nigeria	1,286	1,389	(7)	1,978
Korea	1,184	1,097	8	1,170
China	1,167	669	74	1,770
Taiwan	891	937	(5)	1,005
Indonesia	935	491	90	776
Colombia	749	585	28	679
<b>Top 10 importers</b>	<b>14,967</b>	<b>11,870</b>	<b>26</b>	<b>17,013</b>
<b>Total US wheat export sales</b>	<b>25,366</b>	<b>18,569</b>	<b>37</b>	<b>24,485</b>
% of Projected	91%	88%		
Change from prior week <sup>2</sup>	263	213		
<b>Top 10 importers' share of U.S. wheat export sales</b>	59%	64%		<b>69%</b>
<b>USDA forecast, March 2017</b>	<b>27,929</b>	<b>21,117</b>	<b>32</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
http://www.fas.usda.gov/esquery/. Total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 16

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

Port Regions	For the Week Ending 03/16/17	Previous Week <sup>1</sup>	Current Week as % of Previous	2017 YTD	2016 YTD	2017 YTD as % of 2016 YTD	Last 4-weeks as % of:		2016 Total
							Last Year	Prior 3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	386	236	164	2,699	2,434	111	119	115	12,325
Corn	370	440	84	2,865	1,237	232	227	200	12,009
Soybeans	161	68	236	3,003	4,101	73	72	81	14,447
<b>Total</b>	<b>918</b>	<b>745</b>	<b>123</b>	<b>8,567</b>	<b>7,772</b>	<b>110</b>	<b>125</b>	<b>125</b>	<b>38,782</b>
<b>Mississippi Gulf</b>									
Wheat	83	114	73	992	765	130	118	130	3,480
Corn	803	938	86	8,199	5,226	157	163	145	31,420
Soybeans	538	517	104	8,021	7,777	103	99	101	35,278
<b>Total</b>	<b>1,424</b>	<b>1,569</b>	<b>91</b>	<b>17,212</b>	<b>13,768</b>	<b>125</b>	<b>131</b>	<b>126</b>	<b>70,178</b>
<b>Texas Gulf</b>									
Wheat	158	202	79	1,279	620	206	227	152	6,019
Corn	0	0	n/a	211	189	112	64	115	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
<b>Total</b>	<b>158</b>	<b>202</b>	<b>79</b>	<b>1,490</b>	<b>901</b>	<b>165</b>	<b>189</b>	<b>148</b>	<b>8,792</b>
<b>Interior</b>									
Wheat	22	20	106	369	272	136	96	103	1,543
Corn	133	153	87	1,385	1,226	113	113	120	7,197
Soybeans	67	102	66	1,109	909	122	111	106	4,577
<b>Total</b>	<b>221</b>	<b>275</b>	<b>80</b>	<b>2,863</b>	<b>2,408</b>	<b>119</b>	<b>110</b>	<b>113</b>	<b>13,317</b>
<b>Great Lakes</b>									
Wheat	8	0	n/a	8	0	n/a	n/a	n/a	1,186
Corn	0	0	n/a	0	0	n/a	n/a	n/a	584
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	910
<b>Total</b>	<b>8</b>	<b>0</b>	<b>n/a</b>	<b>8</b>	<b>0</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>2,681</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	36	99	36	0	0	315
Corn	0	0	n/a	0	9	0	0	0	294
Soybeans	9	25	38	608	691	88	72	47	2,269
<b>Total</b>	<b>9</b>	<b>25</b>	<b>38</b>	<b>643</b>	<b>799</b>	<b>81</b>	<b>56</b>	<b>38</b>	<b>2,878</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	657	573	115	5,383	4,191	128	134	123	24,867
Corn	1,306	1,532	85	12,660	7,887	161	165	152	53,173
Soybeans	776	712	109	12,740	13,570	94	91	93	58,587
<b>Total</b>	<b>2,739</b>	<b>2,817</b>	<b>97</b>	<b>30,783</b>	<b>25,648</b>	<b>120</b>	<b>129</b>	<b>123</b>	<b>136,627</b>

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

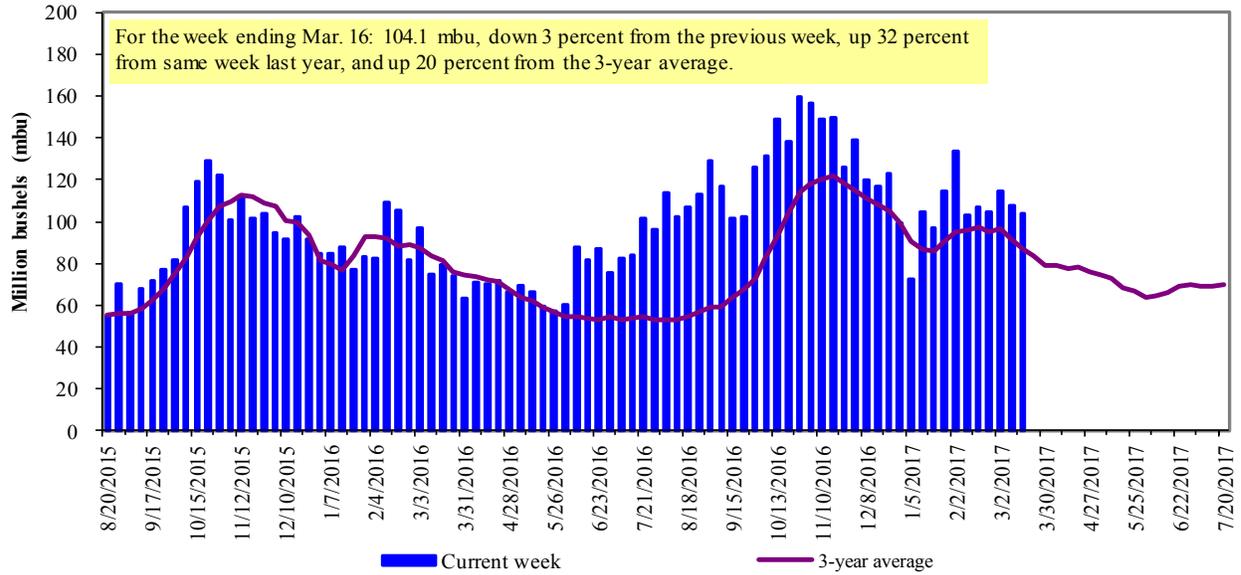
Source: Grain Inspection, Packers and Stockyards Administration/USDA ([www.gipsa.usda.gov](http://www.gipsa.usda.gov)); YTD= year-to-date; n/a = not applicable

<sup>2</sup> Total only includes regions shown above.

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 58 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2016.

Figure 14

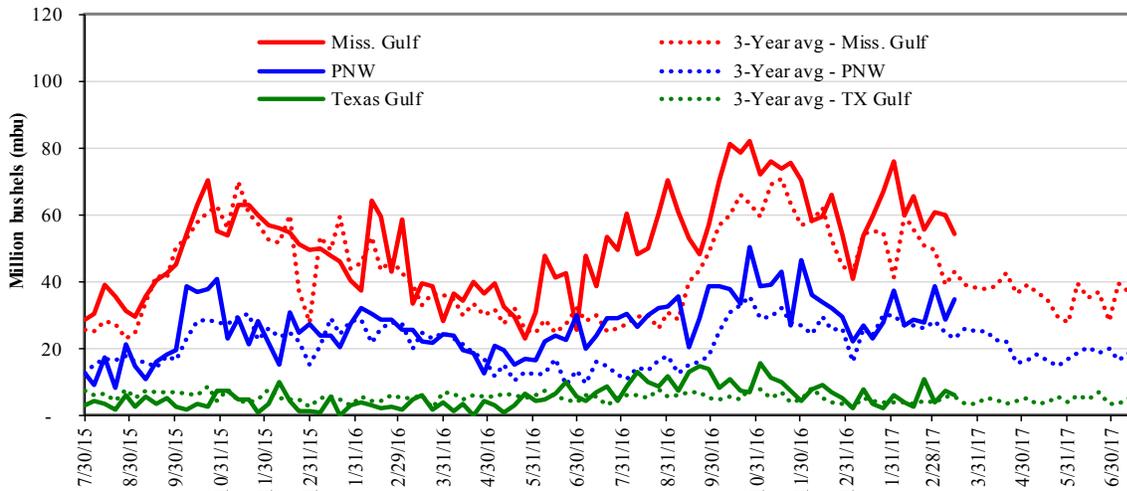
**U.S. grain inspected for export (wheat, corn, and soybeans)**



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 03/16/17 inspections (mbu):		Percent change from:				
Mississippi Gulf:	54.4	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	34.7	Last Year (same	down 9	down 21	down 11	up 22
Texas Gulf:	5.8	3-yr avg. (4-wk. mov.	up 37	down 4	up 32	up 58
			up 19	up 25	up 20	up 36

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)  
<sup>1</sup>The 3-year average is based on a 4-week running average

# Ocean Transportation

Table 17

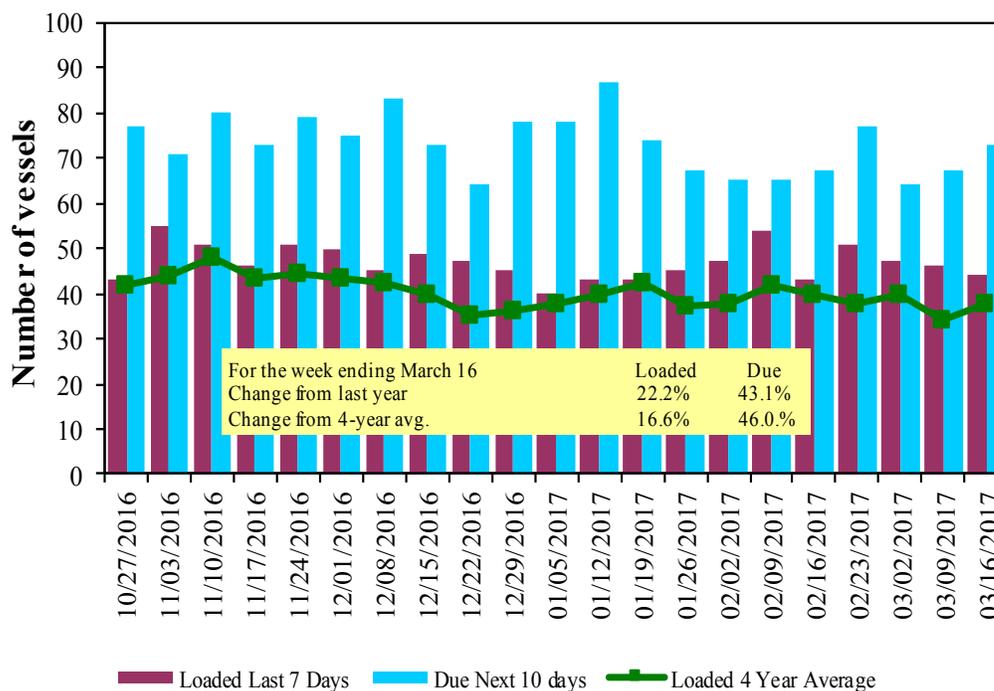
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
3/16/2017	58	44	73	35	n/a
3/9/2017	60	46	67	39	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg.	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

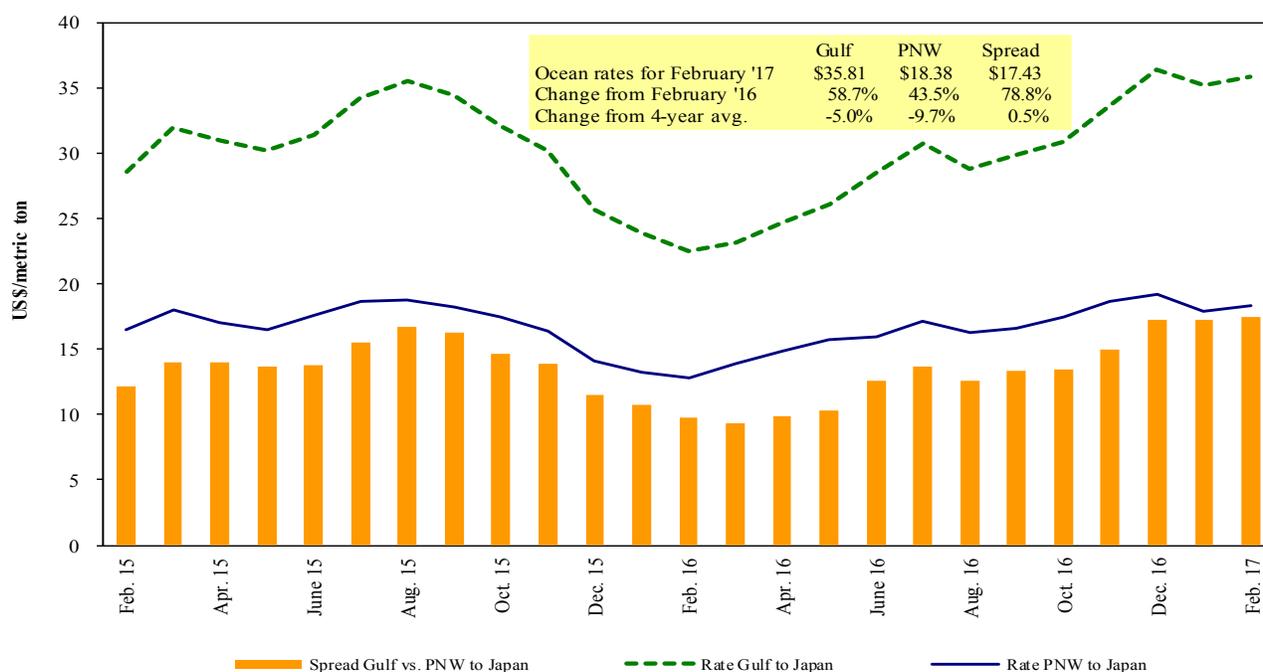
**U.S. Gulf Vessel Loading Activity**



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 3/18/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Cote d'Ivoire	Rice	Jun 19/29	6,000	93.33*
U.S. Gulf	Djibouti	Sorghum	Feb 20/28	29,210	53.39*
PNW	Taiwan	Wheat	May 6/20	52,500	28.48
PNW	Taiwan	Wheat	Apr 19/May 3	50,350	29.12
Vancouver	China	Heavy Grain	Nov 1/10	50,000	31.50
Brazil	China	Heavy Grain	Mar 7/14	66,000	28.50
Brazil	China	Heavy Grain	May 1/5	60,000	23.50
Brazil	China	Heavy Grain	Mar 5/14	65,000	23.90 op 24.40
Brazil	China	Heavy Grain	Feb 20/28	60,000	25.15
Brazil	China	Heavy Grain	Feb 20/28	60,000	22.50
Brazil	China	Heavy Grain	Feb 8/18	60,000	23.85
Brazil	China	Soybeans	Feb 1/10	60,000	24.20
Brazil	South Korea	Heavy Grain	Mar 15/Apr 15	65,000	23.50
EC S. America	China	Heavy Grain	Mar 1/10	60,000	25.25
EC S. America	China	Heavy Grain	Feb 1/10	60,000	24.00
U.S. Gulf	Djibouti	Wheat	Mar 17/27	8,870	67.75*
U.S. Gulf	Berbera	Sorghum	Mar 17/27	34,860	47.75*
Bahia Blanca	Saudi Arabia	Barley	Mar 20/30	60,000	31.75
Brazil	China	Heavy Grain	Mar 21/30	60,000	26.30
Santos	Qingdao	Heavy Grain	Apr 1/15	60,000	29.50
Santos	China	Heavy Grain	Apr 10/15	60,000	28.00
U.S. Gulf	Northern China	Heavy Grain	Mar 15/20	53,000	39.00
Hamburg	Turkey	Wheat	Mar 5/10	60,000	12.50

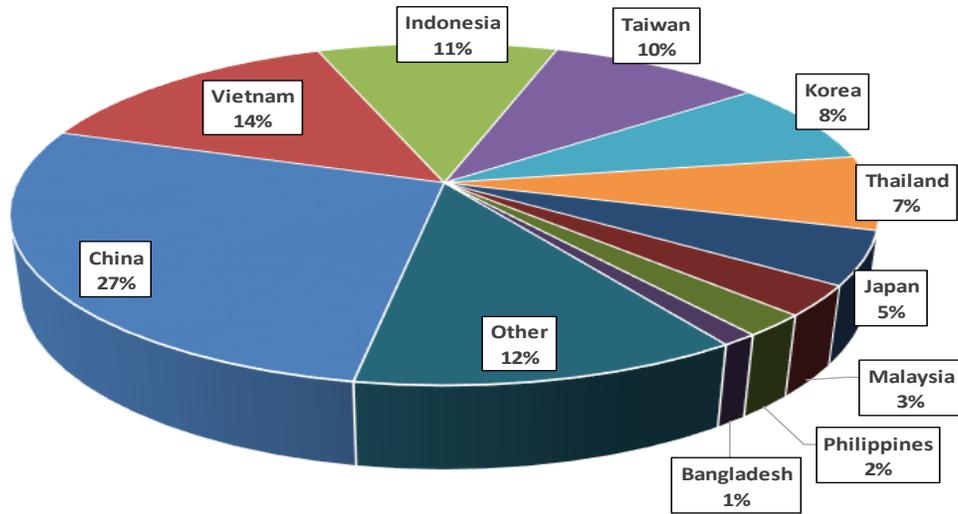
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

\*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 2015, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 64 percent of U.S. waterborne grain exports in 2015 went to Asia, of which 12 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

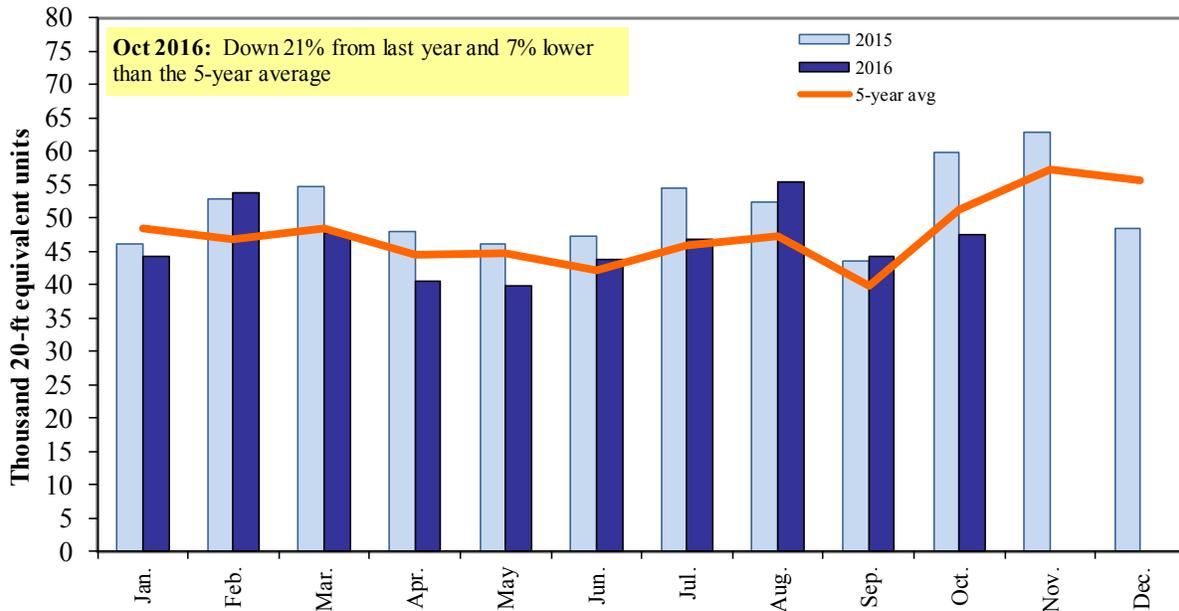
**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, January–October 2016**



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, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

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