



# 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  
April 26, 2018

### Upper Mississippi River Navigation Season Open for 2018

On April 11, the U.S. Army Corps of Engineers (Corps) announced the unofficial start of the Upper Mississippi River navigation season. This is determined when the northernmost stretches of the Mississippi River are not closed due to ice accumulations and the first tow of barges arrives at Mississippi River Lock and Dam 2, near Hasting, MN. This year marked the latest date for the river opening, that was unrelated to flooding. Historic flooding in 2001 delayed the arrival of the first tow until May 11 that year. According to the Corps, the earliest date for an upbound tow to reach Lock and Dam 2 was March 4, in 1983, 1984, and 2000. Last year, the first tow to reach Lock and Dam 2 was on March 9. The average start date of the navigation season is March 22.

### Total Grain Inspections Down; Wheat and Soybeans Higher

For the week ending April 12, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.5 million metric tons (mmt); down 11 percent from the previous week, down 2 percent from last year, and 15 percent above the 3-year average. However, total wheat and soybean inspections increased 12 and 17 percent, respectively, from the previous week; each experiencing an increase in shipments to Latin America. Mississippi Gulf grain inspections decreased 13 percent from the past week. Pacific Northwest (PNW) inspections decreased 31 percent from the previous week, but were above average when compared to last year, and the prior 3-year average. Current outstanding export sales were down for corn and wheat but up for soybeans.

### Quick Look at Rail Service, Carloadings, and the Secondary Market

According to its latest bi-weekly network update (dated April 13), BNSF said it faced several service challenges impacting performance. While the railroad has restored service following an earlier derailment in its Glasgow Subdivision (in eastern Montana) and one in its Red Rock Subdivision (south of Oklahoma City), BNSF mentioned multiple maintenance projects will cause some delays along its primary route through northern Montana. The two major western rail carriers, BNSF and Union Pacific, have originated combined grain carloads over the past 4 weeks (week ending April 7) that are 15 percent above the 3-year average. Over this span, there were sizeable increases in the secondary auction market for railcars to be delivered in April and May. As of April 12, average rates for shuttle freight were \$925 higher than last year for delivery in April and \$717 higher for delivery in May. According to a Canadian Pacific customer bulletin (dated April 18), talks are underway with two rail unions, Teamsters Canada Rail Conference and the International Brotherhood of Electrical Workers. The bulletin states unless a negotiated settlement is reached, the unions plan to strike on April 21, which would severely impact U.S. service for all customers and commodities using Canadian Pacific.

## Snapshots by Sector

### Export Sales

For the week ending April 5, **unshipped balances** of wheat, corn, and soybeans totaled 36.8 mmt, up 26 percent from the same time last year. Net weekly **wheat export sales** were .121 mmt, up 11 percent from the previous week. Net **corn export sales** were .840 mmt, down 6 percent from the previous week. Net **soybean export sales** totaled 1.51 mmt, up 34 percent from the previous week.

### Rail

U.S. Class I railroads originated 25,419 **grain carloads** for the week ending April 7, up 6 percent from the previous week, 7 percent from last year, and 20 percent from the 3-year average.

Average April shuttle **secondary railcar** bids/offers per car were \$700 above tariff for the week ending April 12, up \$225 from last week, and \$925 higher than last year. There were no non-shuttle bids/offers this week.

### Barge

For the week ending April 14, **barge grain movements** totaled 618,250 tons, 2 percent lower than the previous week, and down 11 percent from the same period last year.

For the week ending April 14, 379 grain barges **moved down river**, 16 barges less than the previous week. There were 748 grain barges **unloaded in New Orleans**, 6 percent lower than the previous week.

### Ocean

For the week ending April 12, 40 **ocean-going grain vessels** were loaded in the Gulf, 22 percent less than the same period last year. Fifty-seven vessels are expected to be loaded within the next 10 days, 2 percent more than the same period last year.

For the week ending April 12, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.00 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was \$24.25 per metric ton, unchanged from the previous week.

### Fuel

During the week ending April 16, average **diesel fuel prices** increased 6 cents from the previous week at \$3.10 per gallon, 51 cents higher than the same week last year.

# Feature Article/Calendar

## Ocean Freight Rates Mixed During the First Quarter

Ocean freight rates for shipping bulk commodities, including grains, were mixed during the first quarter of 2018. The rates for shipping bulk grains from the U.S. Gulf to Japan averaged \$44.27 per metric ton (mt) during the quarter; 2 percent higher than the previous quarter, 21 percent higher than the same period a year earlier, and 22 percent higher than the 4-year average (see table and figure below). The cost of shipping from the Pacific Northwest (PNW) to Japan averaged \$24.25 per mt; 1 percent less than the previous quarter, but 27 percent more than the same period a year ago, and 24 percent more than the 4-year average. It cost \$16.82 per mt to ship grain from the U.S. Gulf to Europe during the quarter—4 percent below the previous quarter, but 14 percent above the same period a year earlier, and 5 percent above the 4-year average.

Ocean freight rates for grain routes during the first quarter 2018							
Route	Jan.	Feb.	Mar.	1st quarter 2018	Change from		
					4th qtr '17	1st qtr '17	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	44.25	43.56	45.00	44.27	2	21	22
PNW to Japan	24.50	23.94	24.30	24.25	-1	27	24
Spread*	19.75	19.62	20.70	20.02	5	15	19
U.S. Gulf to Europe	16.69	16.31	17.45	16.82	-4	14	5

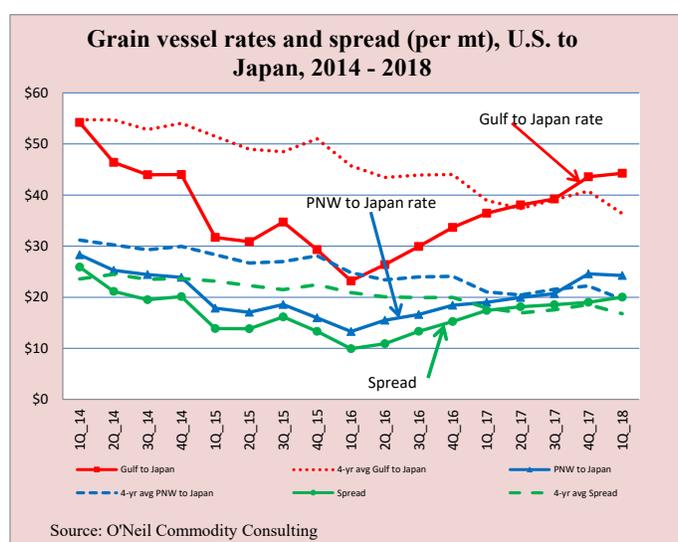
Source: O'Neil Commodity Consulting  
 \*Spread is the difference between ocean freight rates for shipping grain from the U.S. Gulf to Japan and PNW to Japan

The year began with slightly declining ocean freight rates caused by a temporary lull in economic activity due to various holidays. In addition to the cuts in steel production in China, unfavorable weather conditions, including heavy snow and winds, slowed construction activity. Low steel production dampened the demand for iron ore imports. The rates continued to fall during February, as industrial activity slowed down in China, amid the Chinese New Year celebrations. High coal prices also affected the demand from countries that were not facing peak demand season. The rates bounced back in March, as shipments of grain, other minor bulks, and concentrates increased. During March, grain inspected from all U.S. ports totaled 13.33 million metric tons (mmt), compared to 10.81 and 9.28 mmt in February and January, respectively. Due to low domestic production, the European Union removed the import duties on corn, thereby making imported corn competitive with domestically produced corn. China also revoked the restrictions on steel production in most Chinese cities.

### Market Analysis and Outlook

Although bulk ocean freight rates fluctuated just slightly from the previous quarter, they were higher than last year's and above the 4-year average. As of April 5, 2018, ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan and Europe were \$44.00 and \$20.00 per mt, respectively. The rate from the PNW to Japan was \$24.25 per mt. These rates were just 1 percent more than the same period a year ago.

Many factors will determine the direction or sustainability of the current grain vessel rates in the near term. Ship owners were optimistic that



the bulk market would pick up after the Chinese New Year and the removal of restrictions on steel production in China. However, the market has not rebounded.

Deliveries of new bulk vessels have remained relatively stagnant and demolition has also remained weak, causing a modest growth in fleet size. According to Drewry Maritime Research, 5 vessels were scrapped in March 2018, compared to 25 vessels during March 2017. A total of 14.7 million deadweight tonnage (mdwt) (vessel growth = 3.7 percent) were demolished in 2017, compared to 32 mdwt in 2016 (vessel growth =1.6 percent). In addition, the average demolition age of vessels has risen from 25 years in 2017, to 29 years in 2018.

Ship owners are optimistic about market turnaround. As a result, fewer older ships are being sent to the demolition yard, thereby sustaining the vessel supply glut in the bulk market. The effect of vessel supply glut is a downward pressure on ocean freight rates.

According to Drewry Maritime Research, demolition will likely increase when the International Maritime Organization (IMO) rules and regulations on the Ballast Water Treatment System (BWTS) are implemented. The regulations were initially scheduled to take effect in 2017, but have been postponed to 2019. Drewry also indicated it may be too costly to install scrubbers and BWTS in older vessels, forcing owners to send them to the demolition yard. Consequently, this would reduce the oversupply but may also put upward pressure on ocean freight rates.

According to industry analysts, construction activity may also pick up in China during the summer, driving up the demand for steel and iron ore. Low coal stocks at Indian power plants, coupled with increased demand for electric consumption during the summer, may boost thermal coal imports.

In the January edition of *Shipping Insight*, Drewry stated that China and other countries' efforts to adapt to renewable sources of energy have created a rising demand for solar and wind panels. This in turn has increased the demand for battery storage, which has led to the increased demand for spodumene used in production of lithium batteries. There has also been an increased demand for aluminum used in making wind and solar panels.

All of these factors have boosted and may continue to boost the demand for Panamax vessels and exert upward pressure on ocean freight rates. [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov)

# 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	
04/18/18	208	275	244	358	197	172
04/11/18	204	275	234	329	197	172

<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)

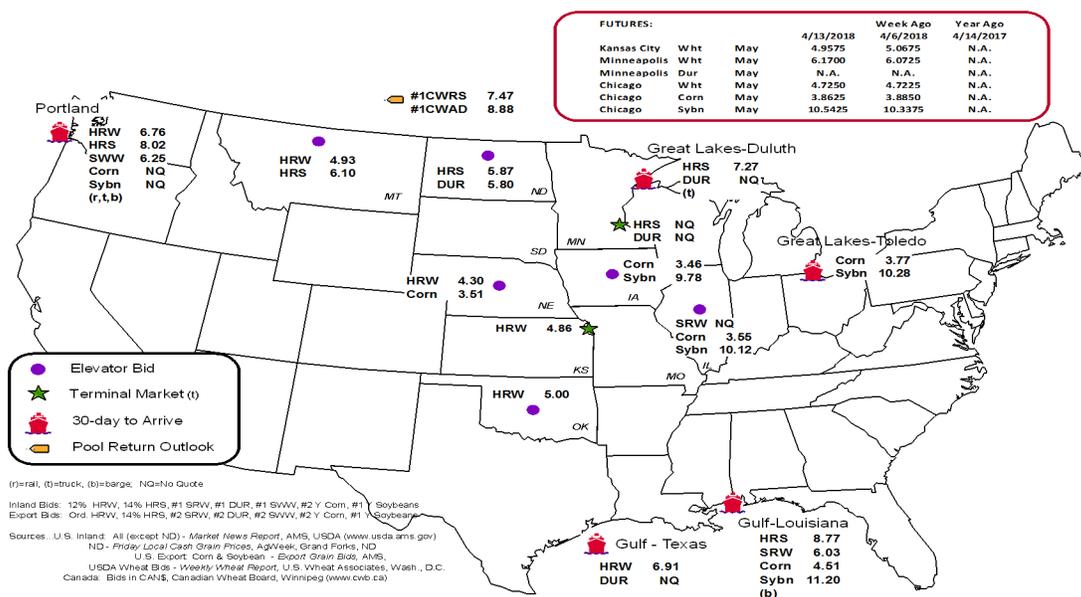
Commodity	Origin--Destination	4/13/2018	4/6/2018
Corn	IL--Gulf	-0.96	-0.91
Corn	NE--Gulf	-1.00	-0.97
Soybean	IA--Gulf	-1.42	-1.42
HRW	KS--Gulf	-2.05	-2.05
HRS	ND--Portland	-2.15	-2.10

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			
04/11/2018 <sup>P</sup>	225	1,234	5,568	891	7,918	4/7/2018	1,884
04/04/2018 <sup>r</sup>	47	1,996	7,017	551	9,611	3/31/2018	1,913
2018 YTD <sup>r</sup>	6,120	24,173	95,323	5,226	130,842	2018 YTD	26,312
2017 YTD <sup>r</sup>	12,087	29,470	94,101	9,192	144,850	2017 YTD	30,689
2018 YTD as % of 2017 YTD	51	82	101	57	90	% change YTD	86
Last 4 weeks as % of 2017 <sup>2</sup>	37	85	111	127	101	Last 4wks % 2017	87
Last 4 weeks as % of 4-year avg. <sup>2</sup>	52	96	123	115	113	Last 4wks % 4 yr	93
Total 2017	28,796	76,545	289,178	21,999	416,518	Total 2017	119,661
Total 2016	36,925	88,035	299,604	29,007	453,571	Total 2016	92,982

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

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

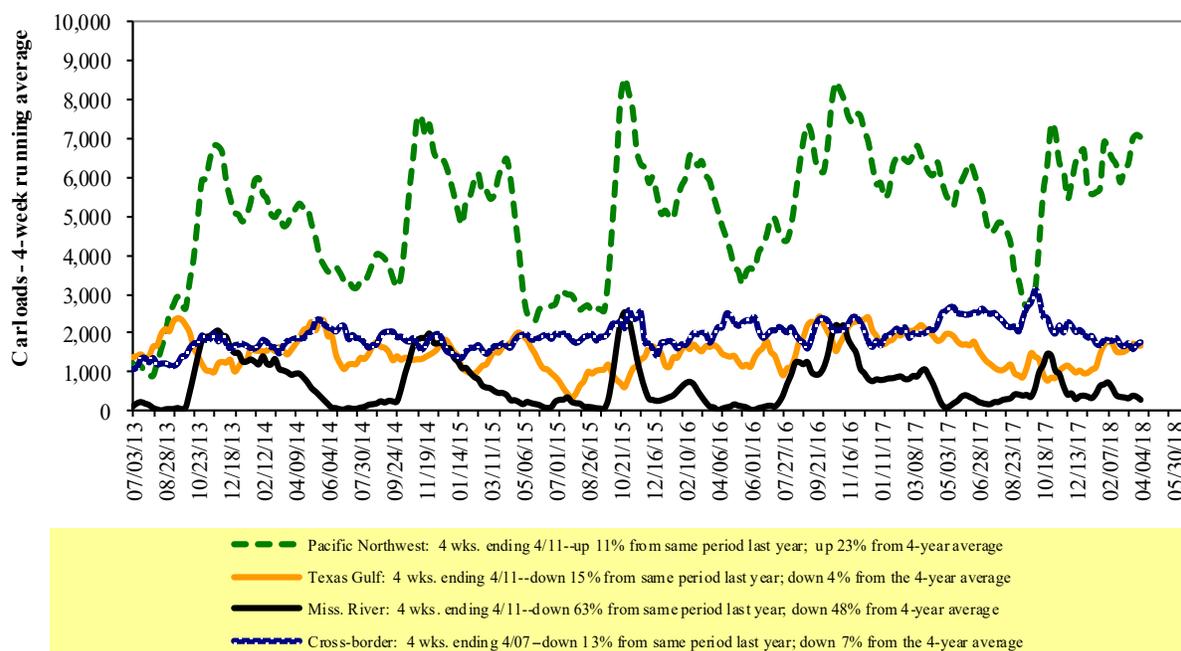
<sup>3</sup> Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Grupo Mexico.

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

Source: Transportation & Marketing Programs/AMS/USDA

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

## 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: 4/7/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,836	2,577	13,477	1,117	6,412	25,419	4,788	4,121
This week last year	2,062	2,878	11,591	887	6,359	23,777	4,554	4,526
2018 YTD	25,960	33,577	169,727	13,037	73,321	315,622	50,043	60,322
2017 YTD	26,923	39,779	157,650	13,741	87,268	325,361	55,483	59,269
2018 YTD as % of 2017 YTD	96	84	108	95	84	97	90	102
Last 4 weeks as % of 2017*	115	79	117	96	87	103	98	104
Last 4 weeks as % of 3-yr avg**	112	80	121	99	101	109	107	106
Total 2017	89,465	142,827	578,964	50,223	289,574	1,151,053	198,633	244,766

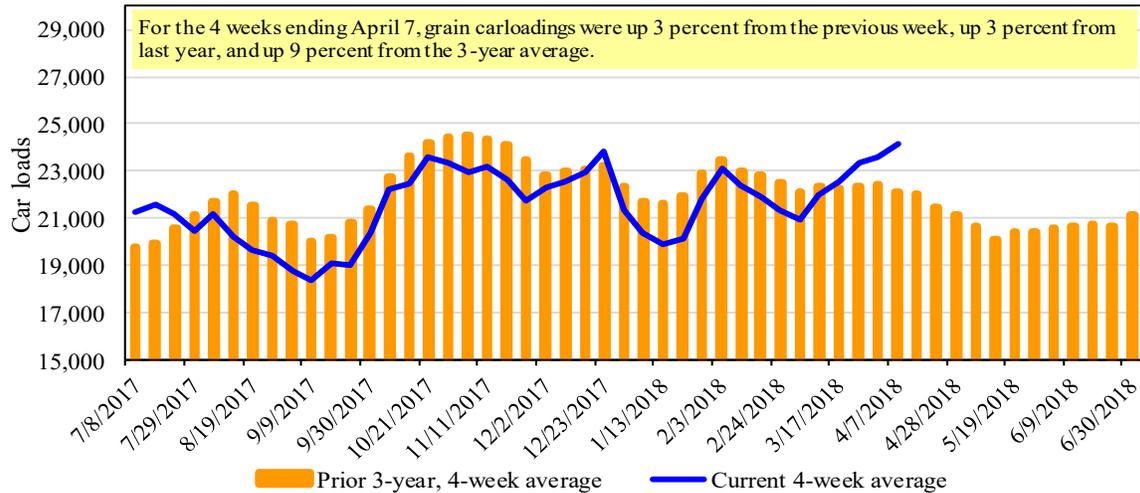
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*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: 4/12/2018		Delivery period							
		Apr-18	Apr-17	May-18	May-17	Jun-18	Jun-17	Jul-18	Jul-17
BNSF <sup>3</sup>	COT grain units	no offer	no offer	0	no bids	0	no bids	0	no bids
	COT grain single-car <sup>5</sup>	no offer	no offer	0	0	0	0	0	0
UP <sup>4</sup>	GCAS/Region 1	no offer	no offer	no offer	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no bids	no offer	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.

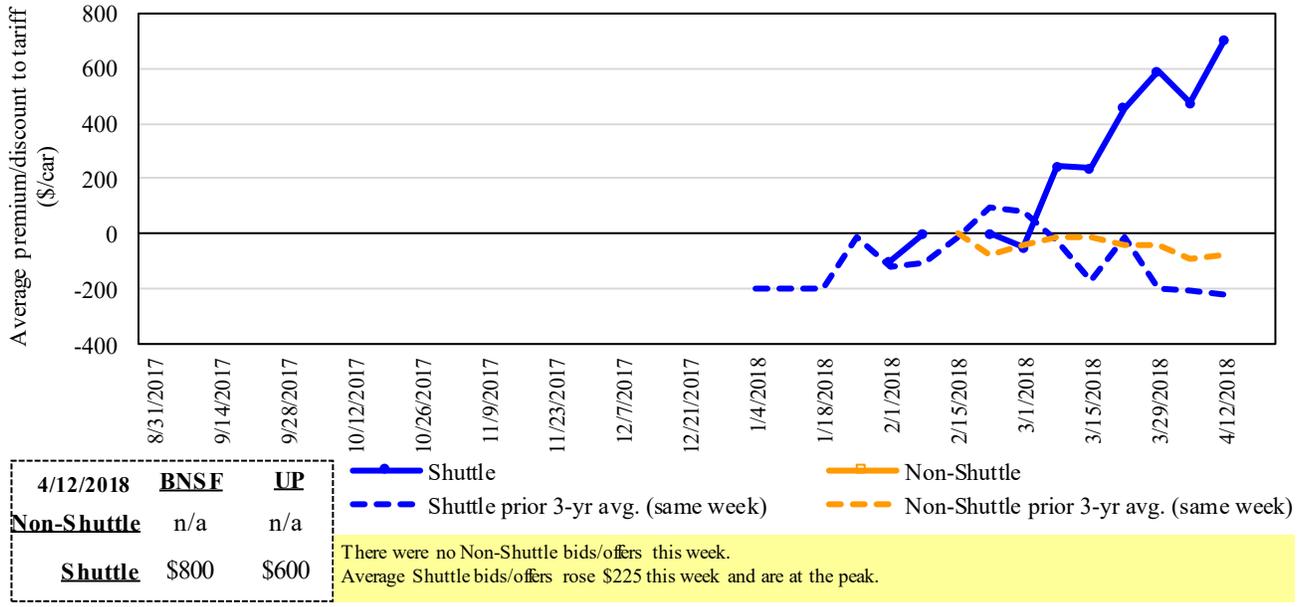
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

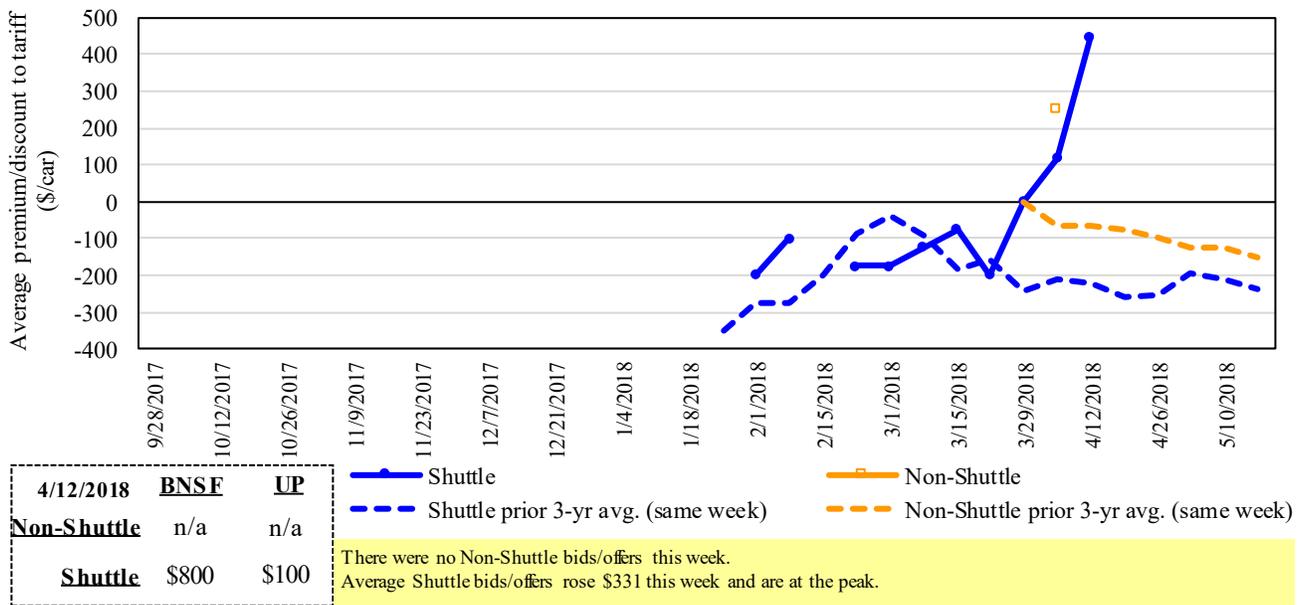
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



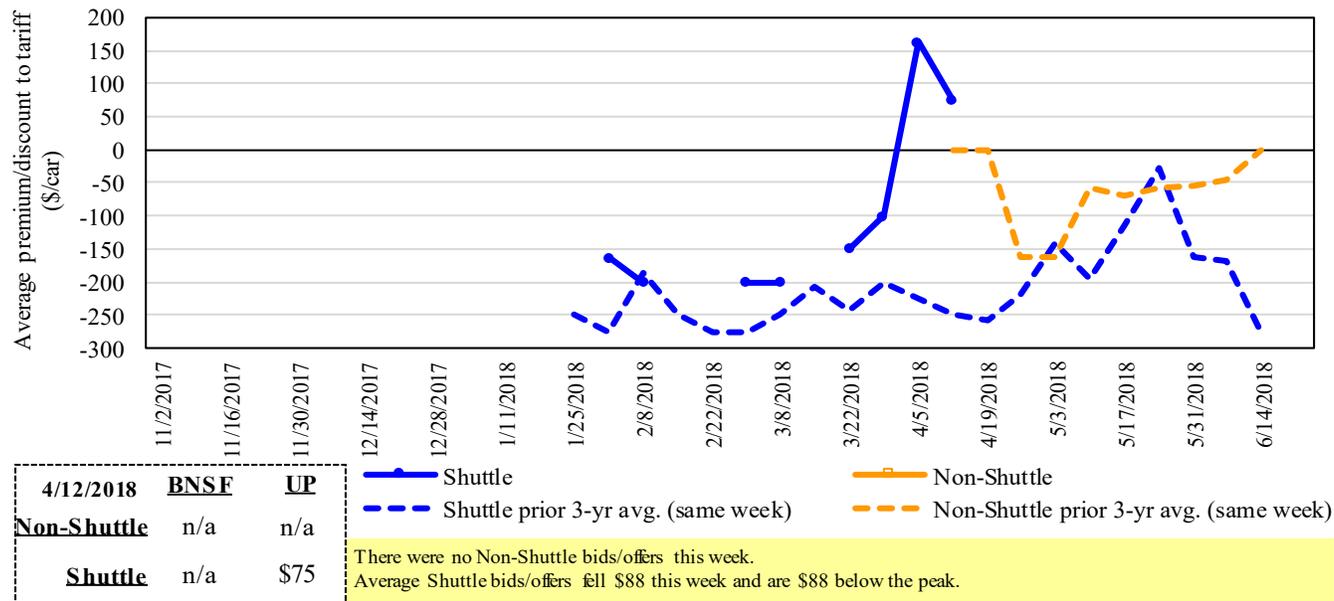
Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
Source: Transportation & Marketing Programs/AMS/USDA

**Figure 5**  
**Bids/Offers for Railcars to be Delivered in May 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 June 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: 4/12/2018		Delivery period					
		Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-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>	<b>800</b>	<b>800</b>	n/a	n/a	n/a	n/a
	Change from last week	200	600	n/a	n/a	n/a	n/a
	Change from same week 2017	1025	1000	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	<b>600</b>	<b>100</b>	<b>75</b>	<b>75</b>	<b>150</b>	<b>250</b>
	Change from last week	250	62	150	25	n/a	n/a
	Change from same week 2017	n/a	433	375	250	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>**

April, 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	\$96	\$39.51	\$1.08	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	\$169	\$46.76	\$1.27	5
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	1
	Northwest KS	Galveston-Houston, TX	\$4,816	\$185	\$49.66	\$1.35	5
	Amarillo, TX	Los Angeles, CA	\$5,021	\$258	\$52.42	\$1.43	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$191	\$40.93	\$1.04	9
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
	Des Moines, IA	Davenport, IA	\$2,258	\$40	\$22.82	\$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	\$119	\$37.02	\$0.94	4
	Des Moines, IA	Los Angeles, CA	\$5,327	\$346	\$56.34	\$1.43	5
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$186	\$42.87	\$1.17	17
	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	\$191	\$49.02	\$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	\$304	\$60.73	\$1.65	5
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,731	\$191	\$38.95	\$0.99	10
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0
	Des Moines, IA	Amarillo, TX	\$3,970	\$150	\$40.91	\$1.04	4
	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
Soybeans	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	\$220	\$49.61	\$1.35	8
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3
Grand Island, NE	Portland, OR	\$5,710	\$311	\$59.79	\$1.63	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: April, 2018			Fuel			Percent	
Commodity	Origin	Destination region	Tariff rate/car <sup>1</sup>	surcharge per car <sup>2</sup>	Tariff plus surcharge per:		change <sup>4</sup> Y/Y
	state				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	\$132	\$69.10	\$1.88	1
	KS	Guadalajara, JA	\$7,309	\$323	\$77.98	\$2.12	2
	TX	Salinas Victoria, NL	\$4,292	\$81	\$44.68	\$1.21	2
Corn	IA	Guadalajara, JA	\$8,313	\$293	\$87.93	\$2.23	2
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$278	\$84.72	\$2.15	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$271	\$78.16	\$1.98	3
	SD	Torreón, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$273	\$85.90	\$2.34	-5
	NE	Guadalajara, JA	\$8,692	\$298	\$91.85	\$2.50	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreón, CU	\$7,489	\$219	\$78.75	\$2.14	1
Sorghum	NE	Celaya, GJ	\$7,345	\$271	\$77.82	\$1.97	3
	KS	Queretaro, QA	\$7,819	\$165	\$81.58	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$133	\$67.28	\$1.71	5
	NE	Torreón, CU	\$6,790	\$211	\$71.53	\$1.82	4

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

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

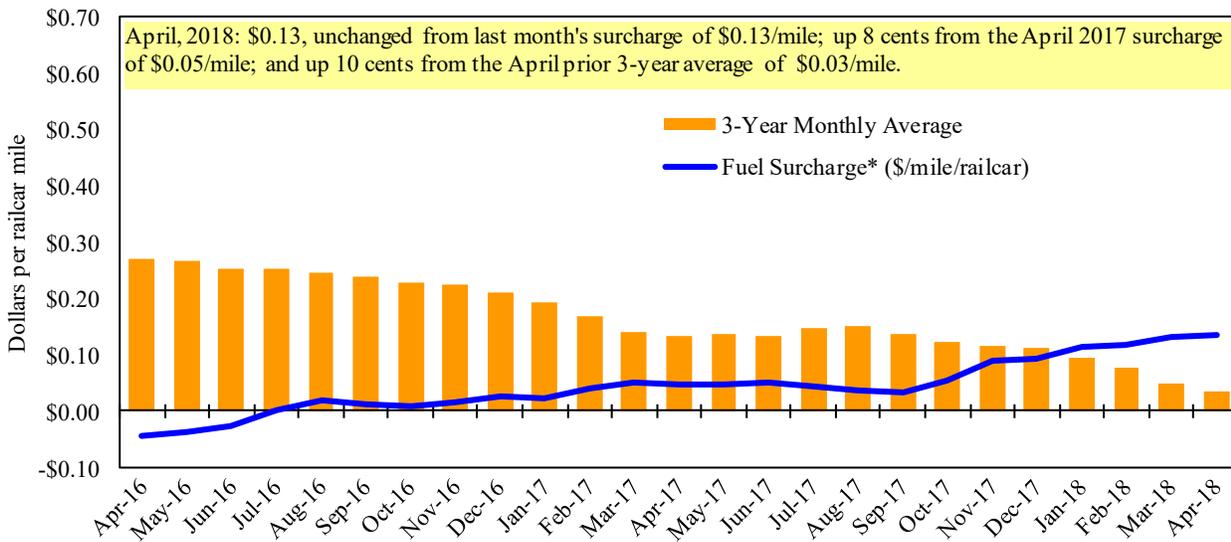
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

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



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

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

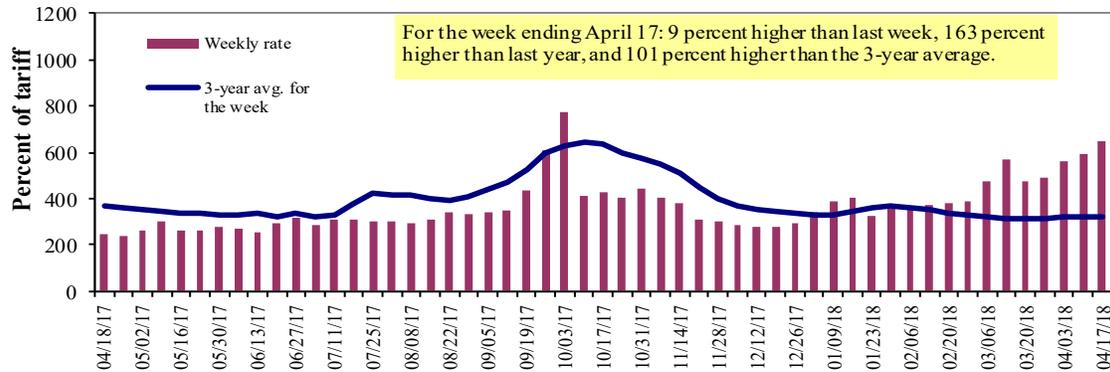
\*\* CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

# Barge Transportation

Figure 8

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	4/17/2018	675	658	645	533	583	583	473
	4/10/2018	583	583	592	492	533	558	458
<b>\$/ton</b>	4/17/2018	41.78	35.01	29.93	21.27	27.34	23.55	14.85
	4/10/2018	36.09	31.02	27.47	19.63	25.00	22.54	14.38
<b>Current week % change from the same week:</b>								
	Last year	131	169	163	205	238	238	196
	3-year avg. <sup>2</sup>	87	103	101	117	134	134	118
<b>Rate<sup>1</sup></b>	May	583	550	520	433	442	442	383
	July	508	480	467	392	383	383	363

<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:

$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$

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

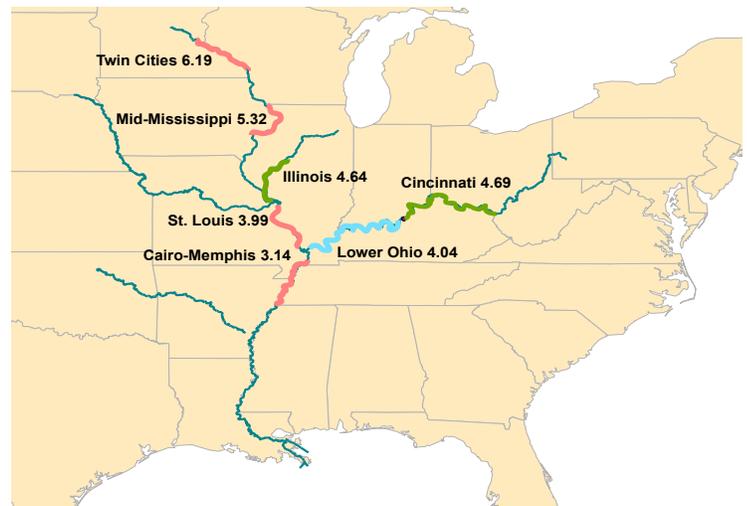
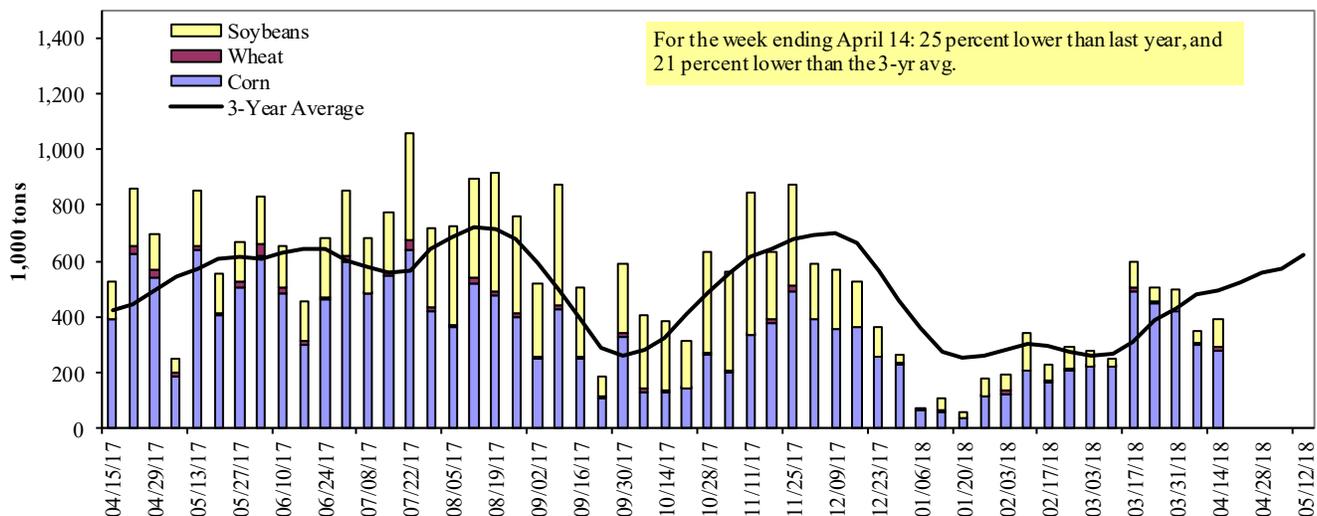


Figure 10

**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 04/14/2018	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	71	0	28	0	99
Winfield, MO (L25)	228	11	63	0	302
Alton, IL (L26)	316	11	103	0	430
Granite City, IL (L27)	278	11	102	0	391
<b>Illinois River (L8)</b>	131	0	55	0	186
<b>Ohio River (L52)</b>	113	7	82	0	203
<b>Arkansas River (L1)</b>	8	6	11	0	25
Weekly total - 2018	400	24	195	0	618
Weekly total - 2017	447	65	184	0	695
2018 YTD <sup>1</sup>	4,847	443	3,111	47	8,448
2017 YTD	6,739	619	3,878	130	11,366
2018 as % of 2017 YTD	72	72	80	36	74
Last 4 weeks as % of 2017 <sup>2</sup>	87	77	93	686	88
<b>Total 2017</b>	<b>22,242</b>	<b>2,210</b>	<b>16,123</b>	<b>360</b>	<b>40,936</b>

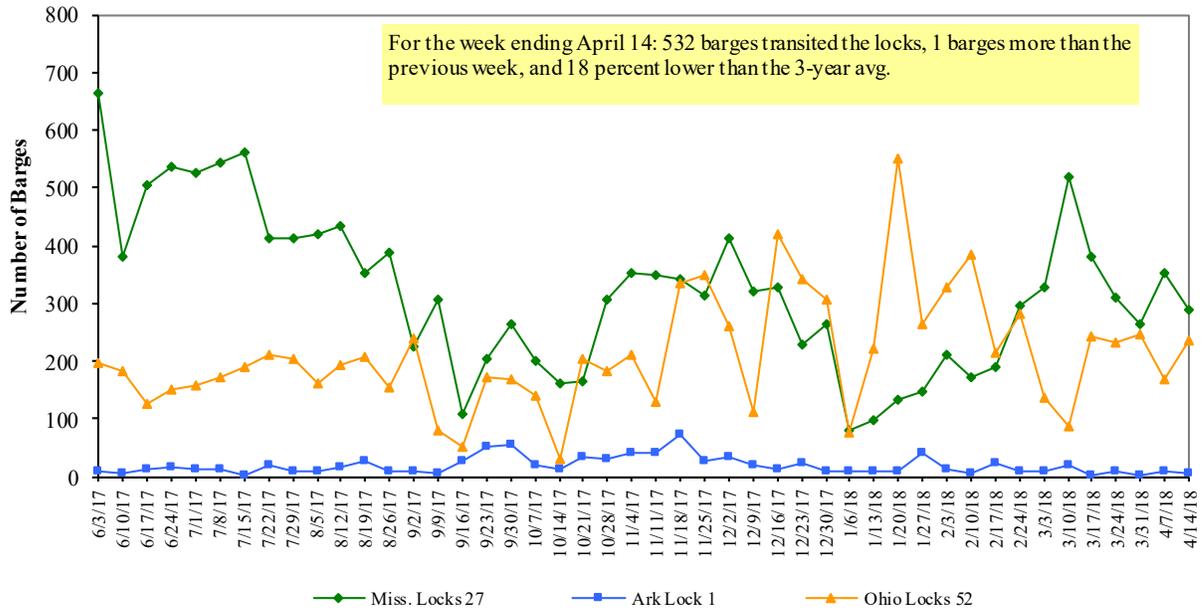
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

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

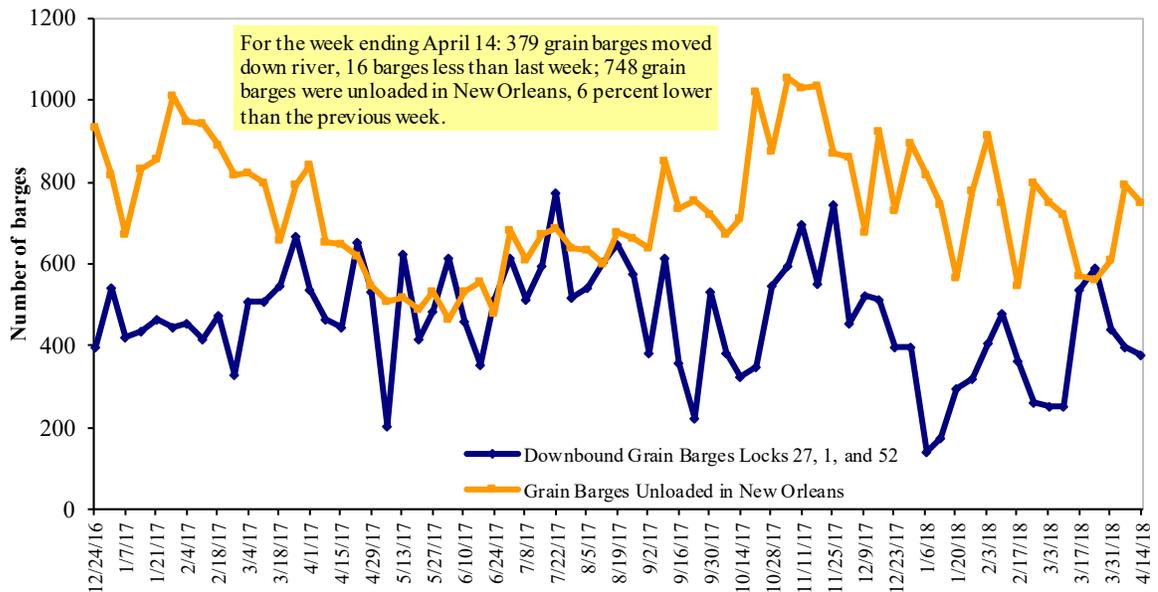
Source: U.S. Army Corps of Engineers

**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 4/16/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.116	0.050	0.485
	New England	3.149	0.032	0.511
	Central Atlantic	3.275	0.043	0.492
	Lower Atlantic	2.998	0.059	0.476
II	Midwest <sup>2</sup>	3.016	0.059	0.480
III	Gulf Coast <sup>3</sup>	2.910	0.066	0.452
IV	Rocky Mountain	3.137	0.051	0.485
V	West Coast	3.583	0.083	0.706
	West Coast less California	3.326	0.100	0.535
	California	3.787	0.070	0.841
Total	U.S.	3.104	0.061	0.507

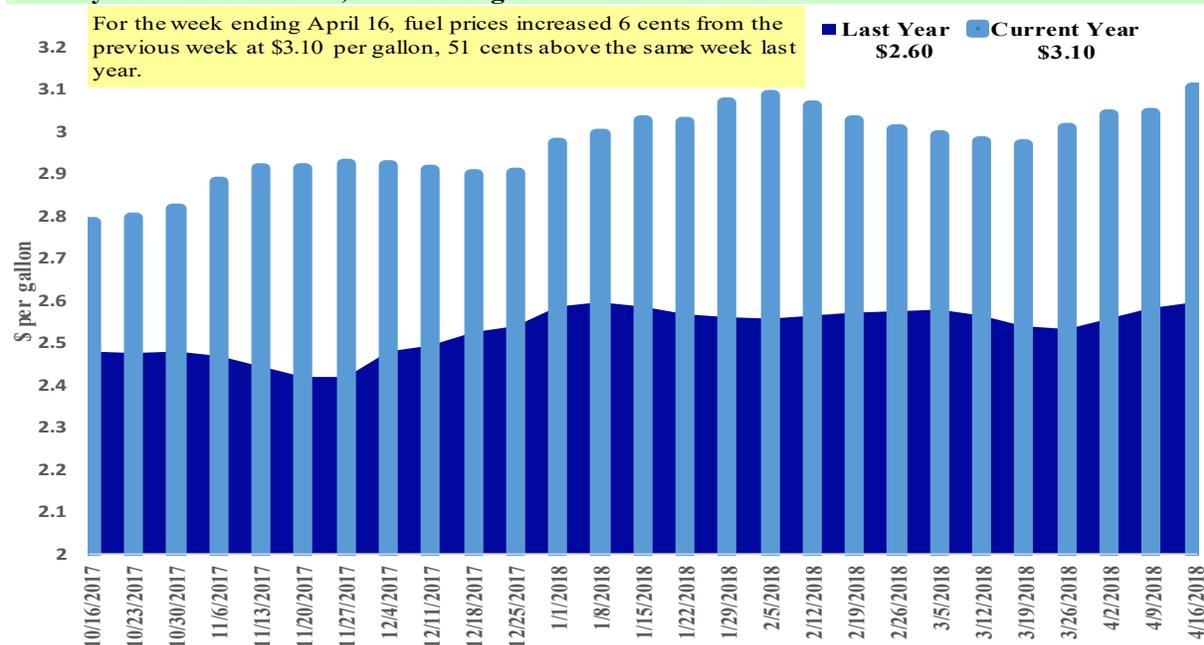
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
4/5/2018	901	497	1,299	948	66	3,711	22,052	10,997	36,759
This week year ago	1,971	492	1,818	1,348	130	5,760	16,096	7,350	29,205
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2017/18 YTD	8,153	1,919	4,706	4,241	308	19,327	26,141	41,998	87,467
2016/17 YTD	9,288	1,917	6,569	3,329	377	21,479	33,204	48,140	102,823
YTD 2017/18 as % of 2016/17	88	100	72	127	82	90	79	87	85
Last 4 wks as % of same period 2016/17	54	113	77	74	56	71	143	136	127
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 4/05/2018	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		
- 1,000 mt -				
Mexico	12,238	12,070	1	12,297
Japan	8,825	9,384	(6)	11,450
Korea	3,908	4,845	(19)	4,494
Colombia	3,216	3,826	(16)	4,179
Peru	2,439	2,438	0	2,693
<b>Top 5 Importers</b>	<b>30,625</b>	<b>32,563</b>	<b>(6)</b>	<b>35,113</b>
<b>Total US corn export sales</b>	<b>48,193</b>	<b>49,300</b>	<b>(2)</b>	<b>49,308</b>
% of Projected	85%	84%		
Change from prior week <sup>2</sup>	<b>840</b>	<b>738</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	64%	66%		71%
<b>USDA forecast, April 2018</b>	<b>56,616</b>	<b>58,346</b>	<b>(3)</b>	
<b>Corn Use for Ethanol USDA forecast, April 2018</b>	<b>141,605</b>	<b>137,973</b>	<b>3</b>	

<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/esquery/>. 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 4/05/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
China	28,929	35,376	(18)	31,881
Mexico	3,740	3,320	13	3,452
Indonesia	1,695	1,707	(1)	1,987
Japan	1,773	1,817	(2)	2,067
Netherlands	1,185	1,323	(10)	2,098
<b>Top 5 importers</b>	<b>37,323</b>	<b>43,544</b>	<b>(14)</b>	<b>41,486</b>
<b>Total US soybean export sales</b>	<b>52,995</b>	<b>55,490</b>	<b>(4)</b>	<b>52,919</b>
% of Projected	94%	94%		
Change from prior week <sup>2</sup>	1,511	402		
<b>Top 5 importers' share of U.S. soybean export sales</b>	70%	78%		<b>78%</b>
<b>USDA forecast, April 2018</b>	<b>56,267</b>	<b>59,237</b>	<b>95</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 4/05/2018	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,807	2,607	8	2,620
Mexico	2,851	3,081	(7)	2,743
Philippines	2,512	2,538	(1)	2,395
Brazil	128	1,184	(89)	862
Nigeria	1,186	1,501	(21)	1,254
Korea	1,421	1,281	11	1,104
China	894	1,346	(34)	1,623
Taiwan	1,106	1,040	6	768
Indonesia	1,180	1,004	18	726
Colombia	606	789	(23)	635
<b>Top 10 importers</b>	<b>14,691</b>	<b>16,370</b>	<b>(10)</b>	<b>14,729</b>
<b>Total US wheat export sales</b>	<b>23,038</b>	<b>27,239</b>	<b>(15)</b>	<b>22,804</b>
% of Projected	91%	95%		
Change from prior week <sup>2</sup>	121	422		
<b>Top 10 importers' share of U.S. wheat export sales</b>	64%	60%		<b>65%</b>
<b>USDA forecast, April 2018</b>	<b>25,204</b>	<b>28,747</b>	<b>(12)</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 04/12/18	Previous Week*	Current Week as % of Previous	2018 YTD*	2017 YTD*	2018 YTD as % of 2017 YTD	Last 4-weeks as % of:		2017 Total*
							Last Year	Prior 3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	233	318	73	3,264	3,971	82	75	95	14,805
Corn	451	610	74	5,475	4,259	129	158	179	10,928
Soybeans	0	72	0	3,661	3,535	104	80	75	13,246
<b>Total</b>	<b>685</b>	<b>999</b>	<b>69</b>	<b>12,400</b>	<b>11,765</b>	<b>105</b>	<b>112</b>	<b>128</b>	<b>38,978</b>
<b>Mississippi Gulf</b>									
Wheat	113	118	95	1,338	1,449	92	93	110	4,198
Corn	836	1,077	78	8,997	11,560	78	93	121	28,690
Soybeans	238	167	142	7,949	9,488	84	70	91	32,911
<b>Total</b>	<b>1,187</b>	<b>1,362</b>	<b>87</b>	<b>18,284</b>	<b>22,497</b>	<b>81</b>	<b>86</b>	<b>111</b>	<b>65,800</b>
<b>Texas Gulf</b>									
Wheat	121	11	n/a	1,378	1,990	69	41	69	6,354
Corn	0	32	0	163	286	57	85	101	733
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	292
<b>Total</b>	<b>121</b>	<b>43</b>	<b>280</b>	<b>1,541</b>	<b>2,276</b>	<b>68</b>	<b>46</b>	<b>73</b>	<b>7,379</b>
<b>Interior</b>									
Wheat	38	6	645	422	534	79	49	53	1,727
Corn	191	188	101	2,118	2,162	98	108	132	8,758
Soybeans	158	84	188	1,739	1,533	113	138	173	5,508
<b>Total</b>	<b>386</b>	<b>278</b>	<b>139</b>	<b>4,279</b>	<b>4,230</b>	<b>101</b>	<b>111</b>	<b>135</b>	<b>15,993</b>
<b>Great Lakes</b>									
Wheat	4	0	n/a	23	27	84	18	35	711
Corn	0	0	n/a	0	0	n/a	n/a	n/a	192
Soybeans	0	0	n/a	0	26	0	0	0	890
<b>Total</b>	<b>4</b>	<b>0</b>	<b>n/a</b>	<b>23</b>	<b>53</b>	<b>43</b>	<b>8</b>	<b>19</b>	<b>1,793</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	64	37	174	n/a	77	46
Corn	0	0	n/a	0	5	0	0	0	32
Soybeans	73	78	93	732	744	98	160	214	2,001
<b>Total</b>	<b>73</b>	<b>78</b>	<b>93</b>	<b>796</b>	<b>785</b>	<b>101</b>	<b>176</b>	<b>164</b>	<b>2,079</b>
<b>U.S. total from ports*</b>									
Wheat	508	454	112	6,488	8,009	81	68	89	27,841
Corn	1,478	1,906	78	16,754	18,271	92	111	138	49,333
Soybeans	468	401	117	14,081	15,327	92	87	105	54,847
<b>Total</b>	<b>2,455</b>	<b>2,760</b>	<b>89</b>	<b>37,323</b>	<b>41,607</b>	<b>90</b>	<b>95</b>	<b>118</b>	<b>132,021</b>

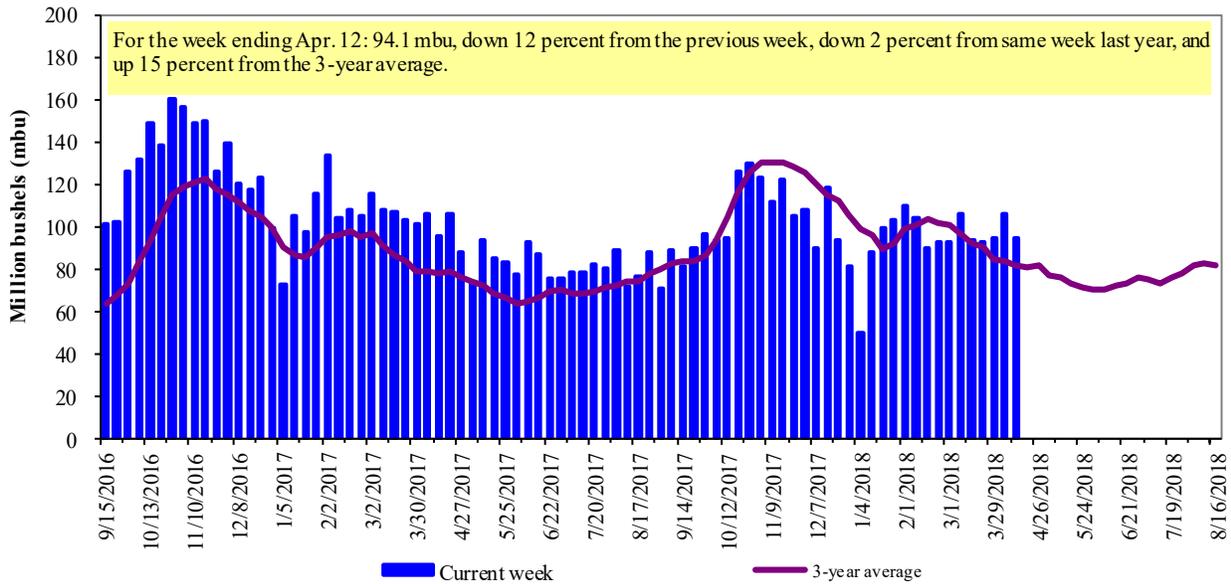
\*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 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)**

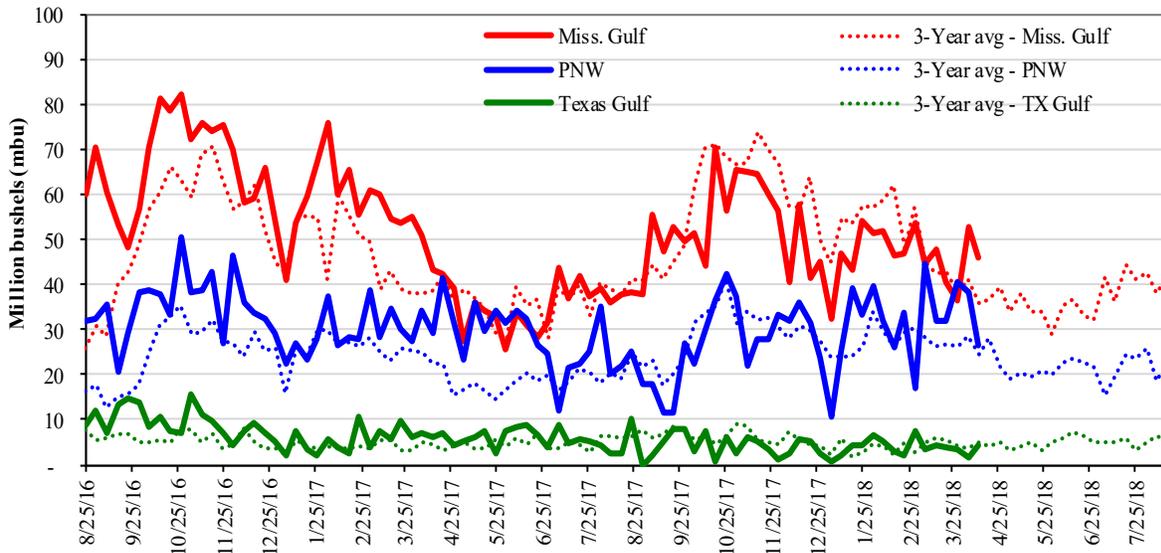


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)**



<u>Week ending 04/12/18 inspections (mbu):</u>		<u>Percent change from:</u>				
Mississippi Gulf:	45.8	Last Week:	MS Gulf down 13	TX Gulf up 166	U.S. Gulf down 8	PNW down 31
PNW:	26.4	Last Year (same week):	up 6	down 26	up 2	down 10
Texas Gulf:	4.4	3-yr avg. (4-wk. mov. Avg):	up 16	down 3	up 14	unchanged

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

# Ocean Transportation

Table 17

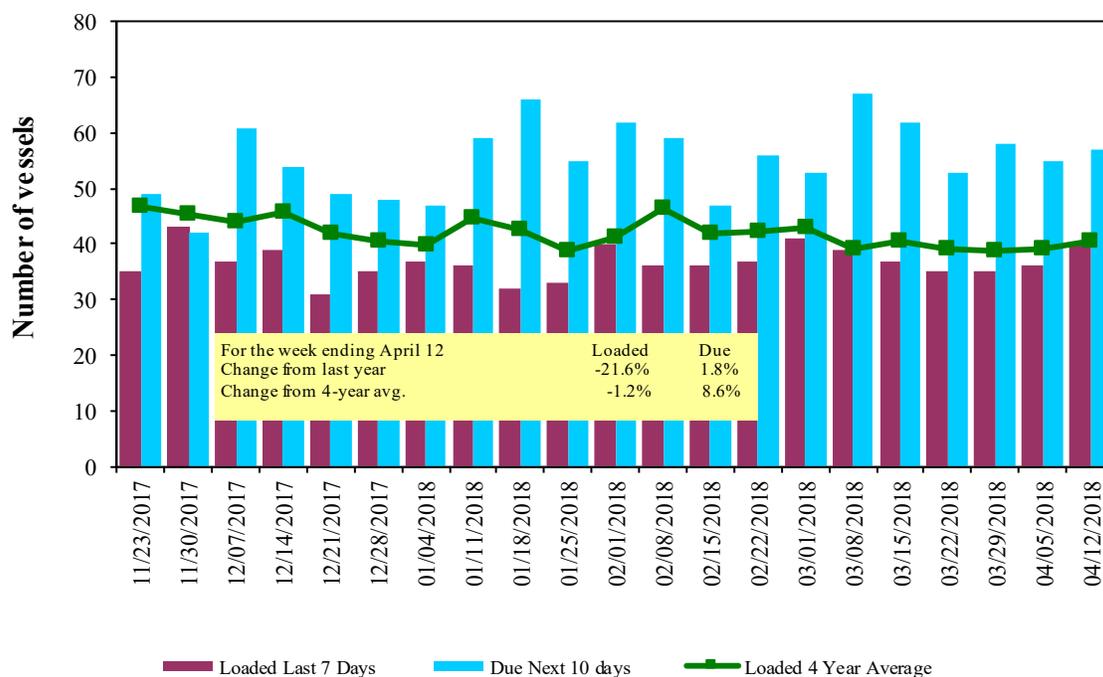
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
4/12/2018	51	40	57	28
4/5/2018	58	36	55	23
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

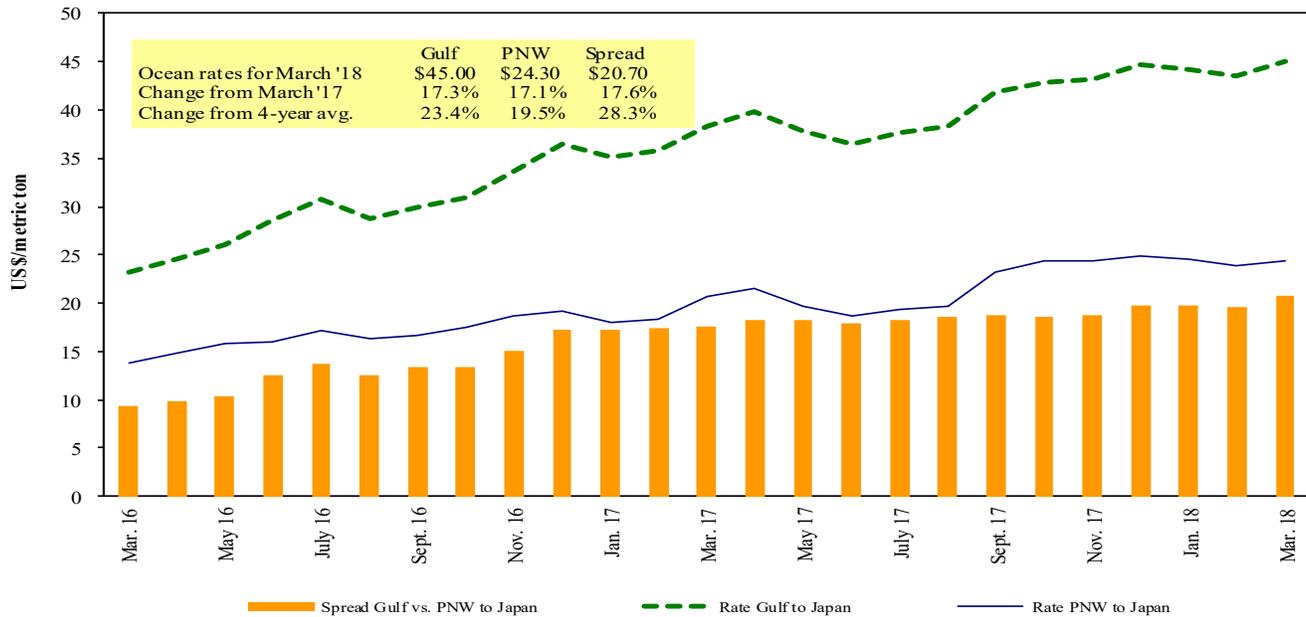
**U.S. Gulf Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA  
 1U.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 04/14/2018**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Djibouti	Sorghum	Apr 16/26	18,200	69.87*
U.S. Gulf	Rotterdam	Heavy Grain	Apr 17/30	65,000	21.00
U.S. Gulf	Somalia	Sorghum	Apr 16/26	40,000	130.77*
PNW	Bangladesh	Wheat	Apr 6/16	43,500	46.61*
Brazil	China	Heavy Grain	May 3/31	60,000	35.50
Brazil	China	Heavy Grain	Apr 25/30	60,000	35.00
Brazil	China	Heavy Grain	Apr 20/30	60,000	34.00
Brazil	China	Heavy Grain	Apr 3/12	66,000	36.25
Brazil	China	Heavy Grain	Mar 12/21	66,000	32.00
Brazil	China	Heavy Grain	Mar 1/10	66,000	30.00
EC S. America	China	Heavy Grain	Mar 15/24	60,000	33.50

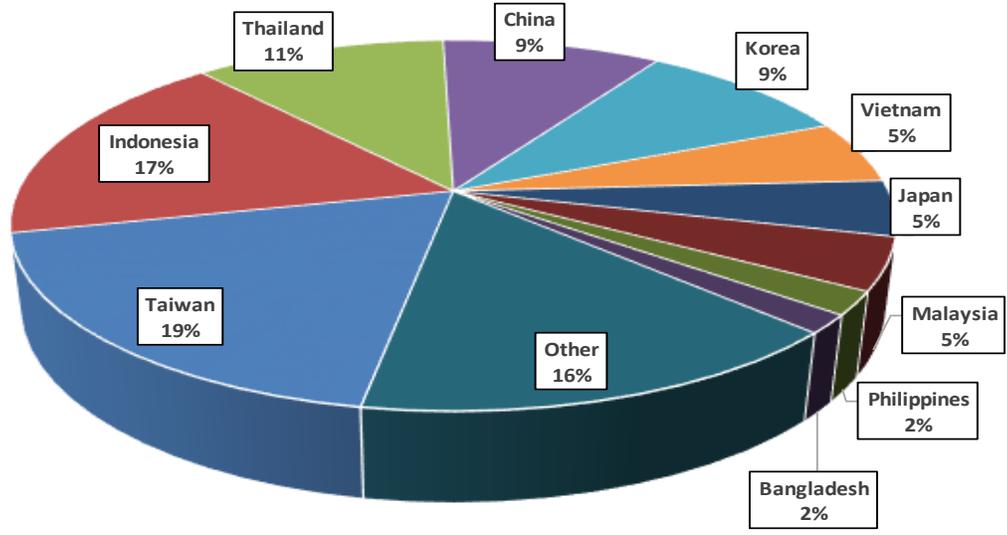
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

\*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 2017, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2017 went to Asia, of which 10 percent were moved in containers. Approximately 93 percent of U.S. waterborne containerized grain exports were destined for Asia.

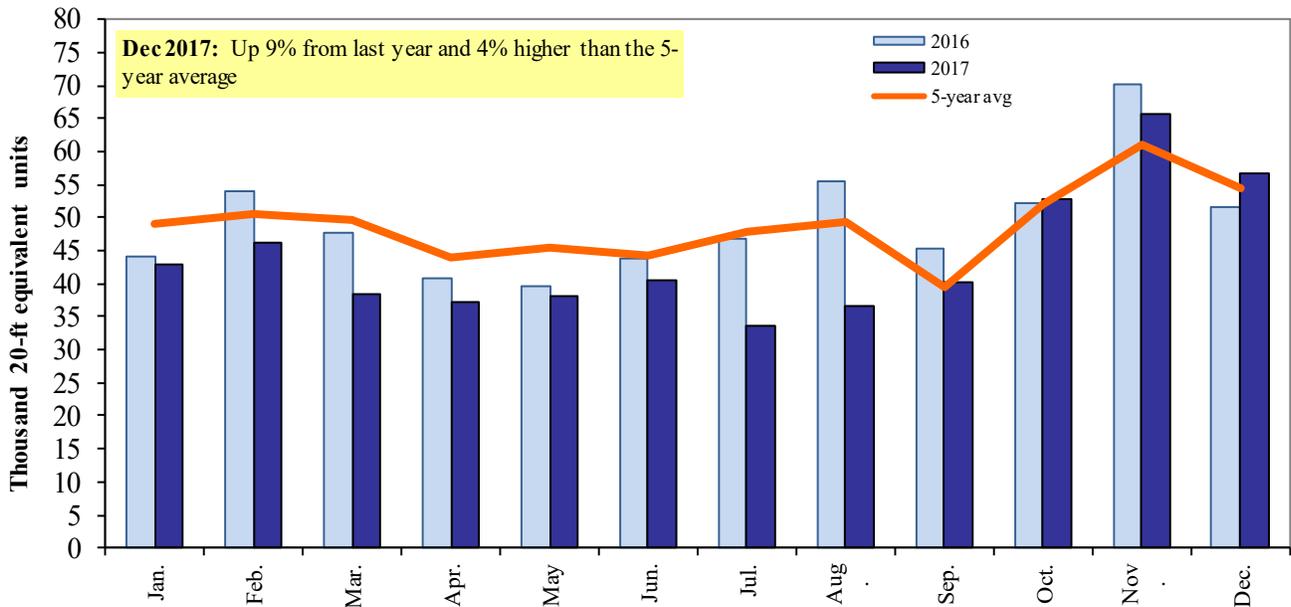
**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, January–December 2017**



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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