



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

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## WEEKLY HIGHLIGHTS

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### Higher Corn and Soybean Inspections Push Total Exports Up

For the week ending April 20, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.7 million metric tons (mmt), up 10 percent from the previous week, up 45 percent from the same time last year, and 33 percent above the 3-year average. The increase in total grain inspections was driven by increased corn and soybean inspections, which increased 9 and 42 percent, respectively, from the previous week. Wheat inspections decreased 11 percent from the past week. Compared to the previous week, grain inspections jumped 40 percent in the Pacific Northwest (PNW), but decreased 2 percent in the Mississippi Gulf. Outstanding export sales of grain were down for corn, wheat, and soybeans.

### Union Pacific Plans to Invest \$57 Million in its Nebraska Rail Infrastructure

In an April 24 news release, the Union Pacific Railroad (UP) noted its plans to spend \$57 million in infrastructure investments in Nebraska this year, with \$53 million to maintain railroad track. According to the press release, UP invested more than \$638 million in the State from 2012 to 2016. Nebraska is typically the Nation's third largest producer of grain and oilseeds (behind Iowa and Illinois). In 2016, Nebraska farmers harvested 2.08 billion bushels of corn, soybeans, and wheat, up 6 percent from the 3-year average. Rail is an important mode for grain shippers in the State, with railroads transporting over 30 percent of production on average from 2009 to 2012.

### Improving Rail Service Performance in the Pacific Northwest

Last week, BNSF Railroad (BNSF) said it was continuing to improve service performance in the PNW and address congestion at area terminals and facilities. In its service bulletin, BNSF wrote, "Overall car velocity in our Northwest Division has increased by more than one-third from the lowest year-to-date levels reported in early February. While still underperforming versus the levels reported from the previous April, our aggressive efforts to deploy additional resources and take actions, such as modifying some service plans, have been key to driving productivity improvements." The railroad also noted that traffic flows have returned to normal in Texas, following an earlier outage in Hereford.

## Snapshots by Sector

### **Export Sales**

For the week ending April 13, **unshipped balances** of wheat, corn, and soybeans totaled 28 mmt, up 48 percent from the same time last year. Net weekly **wheat export sales** were .414 mmt, down 2 percent from the previous week. Net **corn export sales** were .756 mmt, up 2 percent from the previous week, and net **soybean export sales** were .211 mmt, down 48 percent from the past week.

### **Rail**

U.S. Class I railroads originated 21,566 **grain carloads** for the week ending April 15, down 9 percent from the previous week, up 4 percent from last year, and up 8 percent from the 3-year average.

Average May shuttle **secondary railcar** bids/offers per car were \$291 below tariff for the week ending April 20, down \$24 from last week, and \$102 lower than last year. There were no non-shuttle secondary railcar bids/offers this week.

### **Barge**

For the week ending April 22, **barge grain movements** totaled 1,030,391 tons, 48 percent higher than the last week, and up 29 percent from the same period last year.

For the week ending April 22, 655 grain barges **moved down river**, up 48 percent from last week, 617 grain barges were **unloaded in New Orleans**, down 5 percent from the previous week.

### **Ocean**

For the week ending April 20, 33 **ocean-going grain vessels** were loaded in the Gulf, 11 percent less than the same period last year. Thirty-seven vessels are expected to be loaded within the next 10 days, 34 percent less than the same period last year.

For the week ending April 20, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$40.50 per metric ton, 1 percent more than the previous week. The cost of shipping from the PNW to Japan was \$22.00 per metric ton, 1 percent less than the previous week.

### **Fuel**

During the week ending April 24, average **diesel fuel prices** remain unchanged from the previous week at \$2.60 per gallon, 40 cents higher than the same week last year.

# Feature Article/Calendar

## Bulk Ocean Freight Rates Rose During First Quarter

Ocean freight rates for shipping bulk grains increased during the first quarter of 2017, compared to the previous quarter and the same period a year earlier. However, the rates were lower than the 4-year average. The rates for shipping bulk grain from the U.S. Gulf to Japan averaged \$36.45 per metric ton (mt), an 8 and 57 percent increase from the previous quarter and the same period last year, respectively, but 6 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest (PNW) to Japan averaged \$19.02 per mt, 3 and 43 percent above the previous quarter and the same period last year, respectively, and a 10 percent decline from the 4-year average. The rise in the ocean rates during the first quarter was partly due to strong grain movements and increase demand for other bulk commodities, such as coal and iron ore, during the quarter. For example, year-to-date total grain inspected for export and ocean-going grain vessel loading activity in the U.S. Gulf and the PNW during the first quarter surpassed the previous year's levels (March 23, 2017 *Grain Transportation Report (GTR)*). In addition, there has been increasing demand for coal and iron ore/steel due to “restocking” in China (April 6, 2017 *GTR*). Although, there was an uptick in rates, the rates were still considerably lower than the historic highs of 2008, as excess vessel supply still persists in the market.

**Ocean freight rates for grain routes during the first quarter 2017**

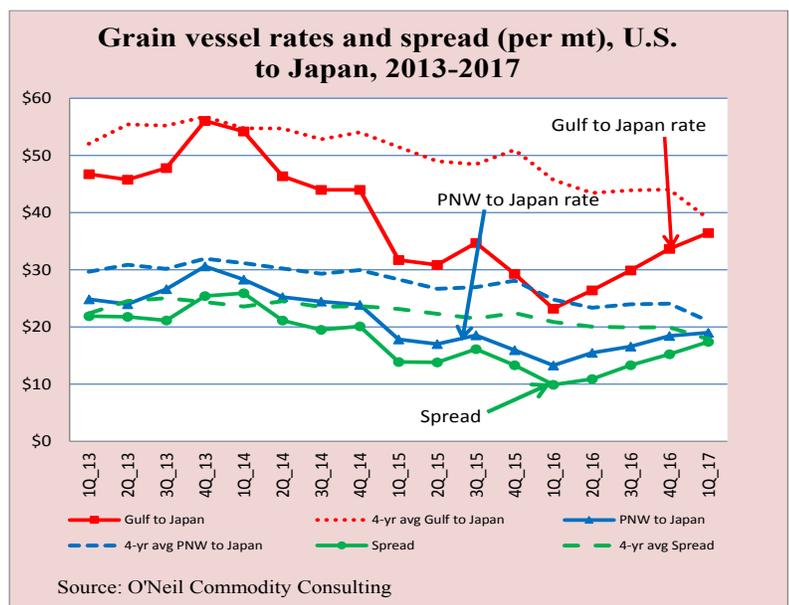
Route	Jan.	Feb.	Mar.	1st quarter 2017	Change from		
					1st qtr '16	4th qtr '16	4-yr avg
	--\$/mt--				Percent		
U.S. Gulf to Japan	35.19	35.81	38.35	36.45	57	8	-6
PNW to Japan	17.94	18.38	20.75	19.02	43	3	-10
Spread*	17.25	17.43	17.60	17.43	76	14	-3
U.S. Gulf to Europe	14.50	14.29	15.51	14.77	27	0	-14

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 quarter started in January with slightly declining rates from December, but still considerably higher than the same period a year earlier. Strong grain export movements of 2016 continued into 2017. About 141 million metric tons of grains were inspected for exports in the United States in 2016—up 16.1 percent from 2015 (USDA, GIPSA). Also, in a possible attempt to reduce the vessel supply, no orders of newly built vessels were placed in January. The orderbook as a percentage of the operating fleet shrank to 9.4 percent, a record low in the dry bulk market.

Rates inched up marginally in February, as strong grain export movements continued. Rates took a big bounce in March due to the increased demand for other bulk commodities such as coal, iron ore, and steel as China began restocking its inventories.



### **Market Analysis and Outlook**

As of April 20, the ocean freight rate for shipping bulk grains from the U.S. Gulf to Japan was \$40.50 per mt. The rate from the PNW to Japan was \$22 per mt. Both rates were above the same period last year. However, it is difficult to predict if the trend is sustainable, as there are many opposing forces pulling the market in different directions, such as vessel supply, grain supply, changes in Chinese policies, and increased operations costs.

Despite the slowdown in the rate of newly built bulk vessels and deliveries, there is still excess vessel supply in the market. The number of new vessels added to the fleet were more than those demolished. From December to March, the dry bulk fleet rose from 800 million dead-weight tons (mdwt) to 806 mdwt. During the first 3 months of 2017, 182 newly-built vessels totaling 16.3 mdwt were delivered, while 60 vessels totaling 4.5 mdwt were scrapped. On the other hand, according to Drewry Maritime Research, Inc., an expected rise in the grain supply in Australia and the United States may increase the demand for Panamax and Supramax vessels, and thus boost rates. Yet another factor is the Chinese government's efforts to curb environmental pollution, which could boost the demand for imported high-grade iron ore in lieu of the costly low-grade domestic ore, thus increasing the demand for bulk vessels and consequently rates. Likewise, China's plan to reinstate a cut on coal production by reducing mine-operating days from 330 to 270 may increase the demand for imported coal. Lastly, the International Maritime Organization's regulations of Ballast Water Management and the requirement to use low-sulfur fuel could increase vessels' operating costs and lead to increased demolition or scrapping of older vessels or bulkers (see January 19, 2017 *GTR*). Increased rate of demolition may reduce or eliminate excess supply of vessels and put upward pressure on rates.

With multiple factors pushing and pulling bulk shipping rates in different directions, it is difficult to predict the longer-term trend for the rest of the year. Depending upon which of these factors are stronger for a longer duration will likely dictate if rates continue climbing, fall, or stay within the current range.

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# 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	
04/26/17	174	261		198	132	181	156
04/19/17	174	257		201	136	180	158

<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)**

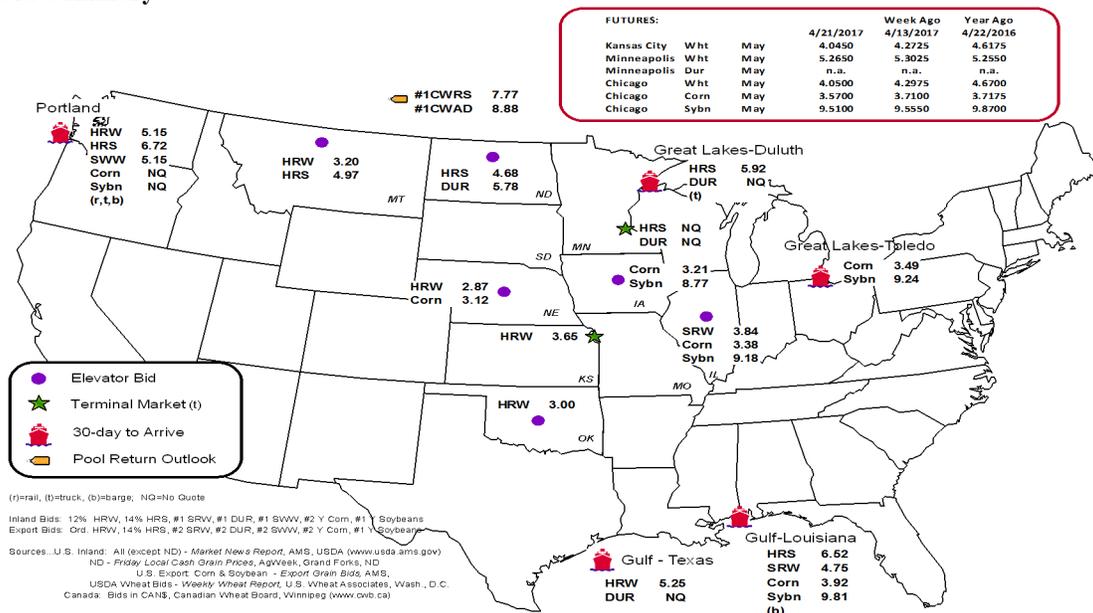
Commodity	Origin--Destination	4/21/2017	4/13/2017
Corn	IL--Gulf	-0.54	-0.57
Corn	NE--Gulf	-0.80	-0.82
Soybean	IA--Gulf	-1.04	-1.02
HRW	KS--Gulf	-1.60	-1.59
HRS	ND--Portland	-2.04	-2.04

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			
04/19/2017 <sup>p</sup>	116	1,100	5,853	298	7,367	4/15/2017	2,674
04/12/2017 <sup>r</sup>	1	1,777	6,027	243	8,048	4/8/2017	2,095
2017 YTD <sup>r</sup>	12,203	30,461	99,843	9,490	151,997	2017 YTD	33,363
2016 YTD <sup>r</sup>	5,392	24,446	89,310	8,457	127,605	2016 YTD	31,635
2017 YTD as % of 2016 YTD	226	125	112	112	119	% change YTD	105
Last 4 weeks as % of 2016 <sup>2</sup>	510	113	142	142	140	Last 4wks % 2016	89
Last 4 weeks as % of 4-year avg. <sup>2</sup>	127	92	148	108	131	Last 4wks % 4 yr	118
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.

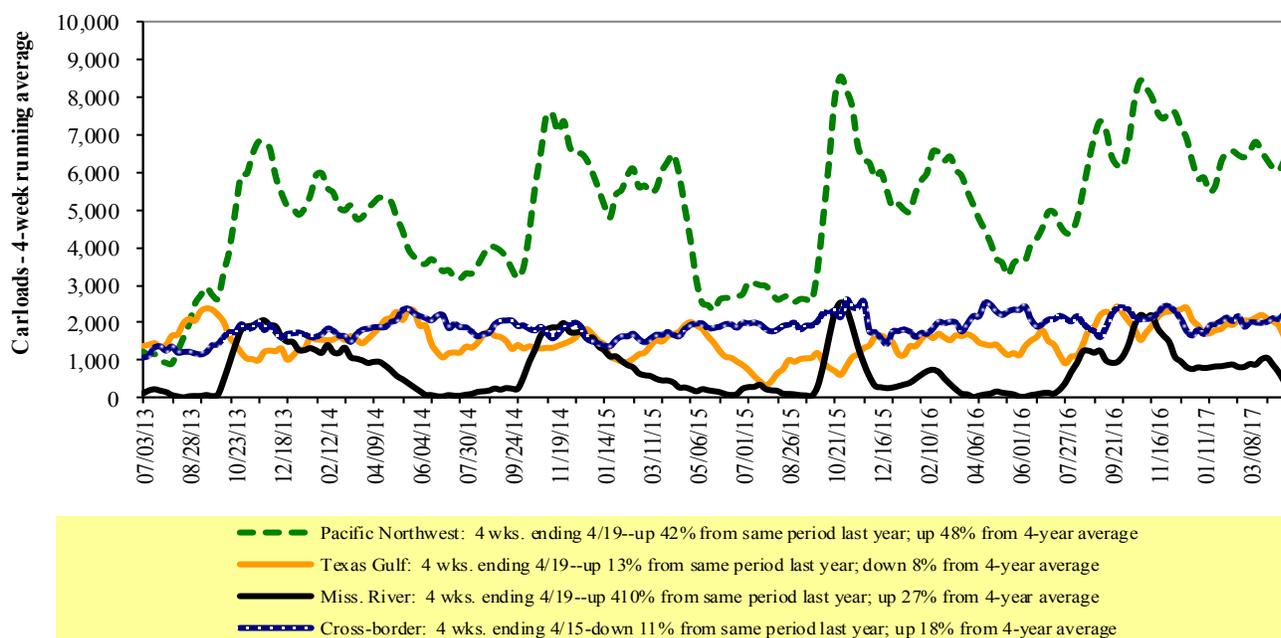
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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)**

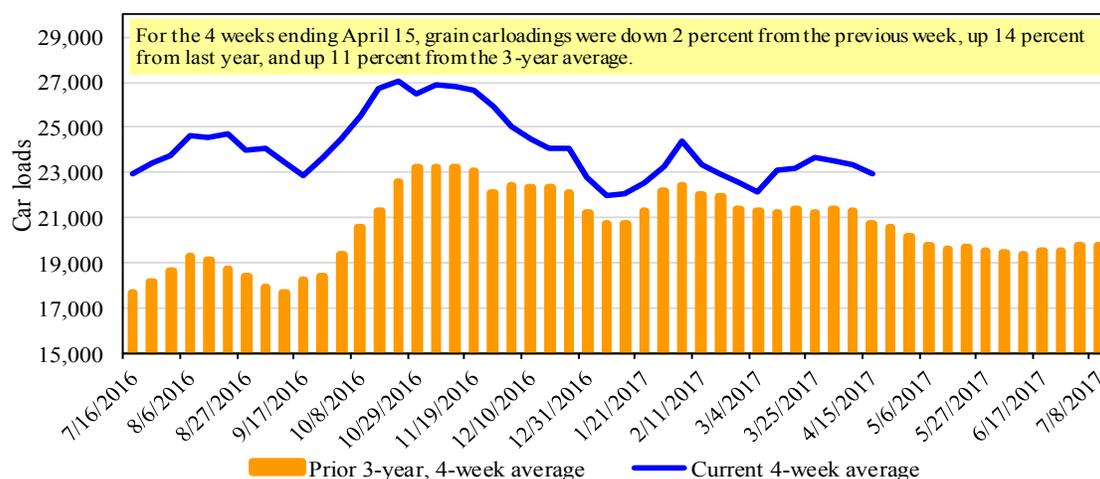
For the week ending: 4/15/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,326	2,678	11,587	968	5,007	21,566	4,406	5,107
This week last year	1,620	2,820	9,986	899	5,459	20,784	3,511	4,253
2017 YTD	28,249	42,349	169,237	14,709	92,275	346,819	60,037	64,376
2016 YTD	28,412	41,823	161,359	12,914	78,824	323,332	51,525	65,702
2017 YTD as % of 2016 YTD	99	101	105	114	117	107	117	98
Last 4 weeks as % of 2016*	99	109	118	111	114	114	121	103
Last 4 weeks as % of 3-yr avg.**	88	98	120	102	111	111	105	96
Total 2016	95,179	151,006	590,779	45,246	300,836	1,183,046	193,969	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: 4/20/2017		Delivery period							
4/20/2017		May-17	May-16	Jun-17	Jun-16	Jul-17	Jul-16	Aug-17	Aug-16
BNSF <sup>3</sup>	COT grain units	no bids	no bids	0	no bids	no bids	no bids	no bids	no bids
	COT grain single-car <sup>5</sup>	0	0-1	1	0	1	no bids	1	no bids
UP <sup>4</sup>	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	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.

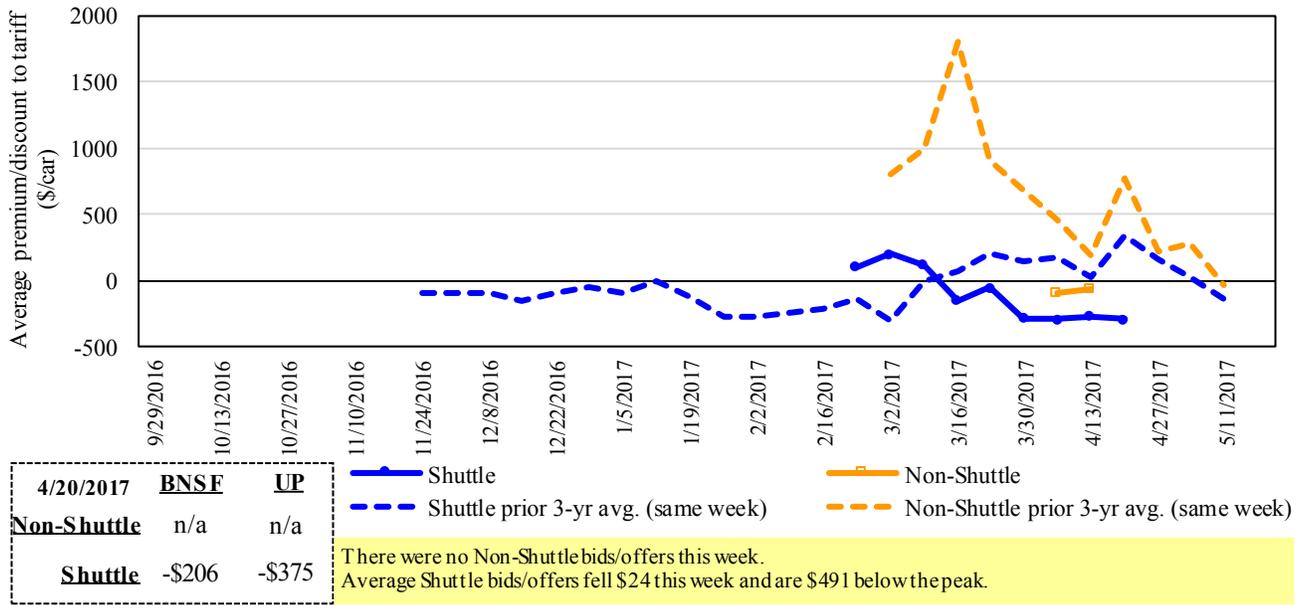
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

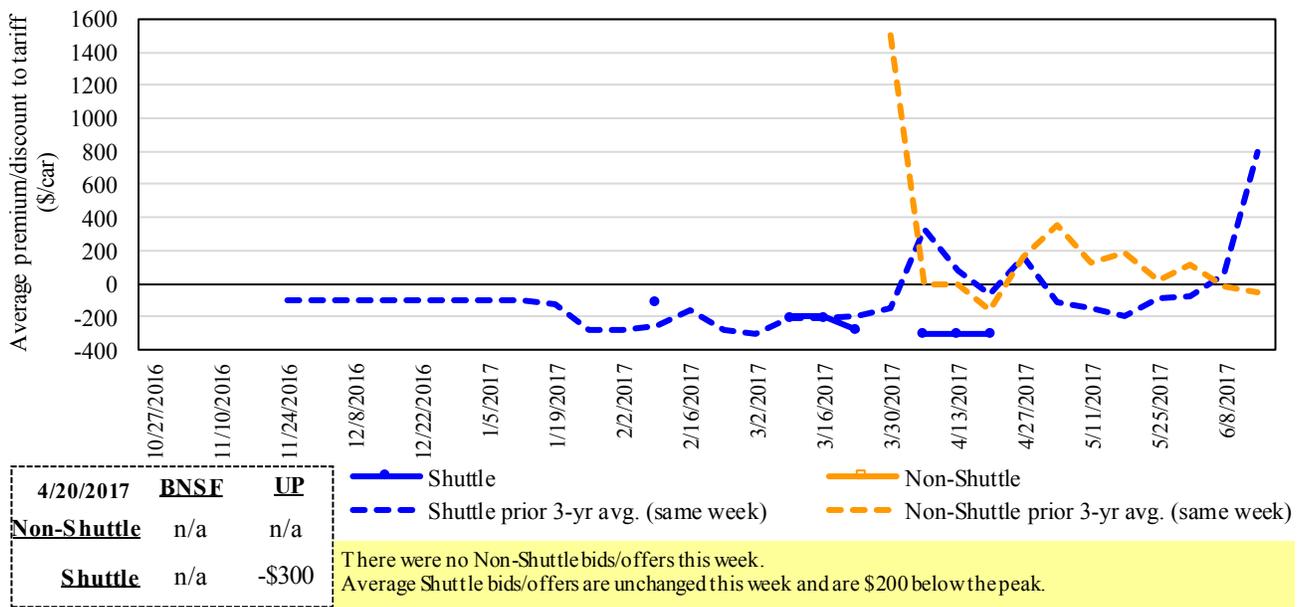
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



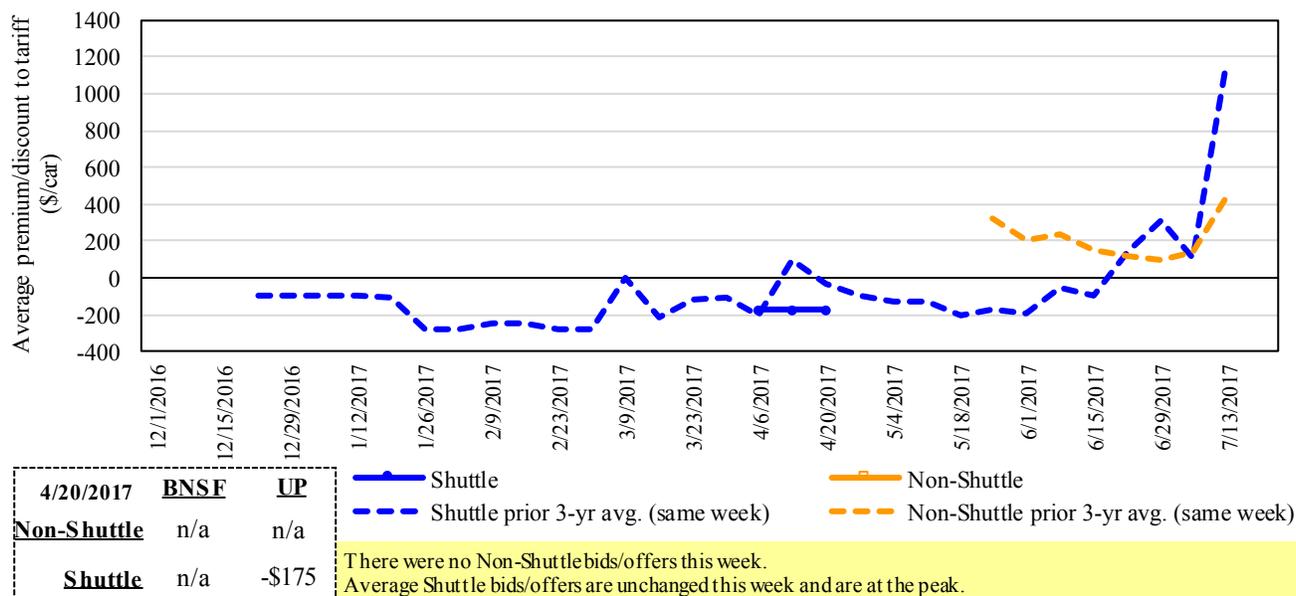
Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
 Source: Transportation & Marketing Programs/AMS/USDA

**Figure 5**  
**Bids/Offers for Railcars to be Delivered in June 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 July 2017, 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:		Delivery period					
		4/20/2017	May-17	Jun-17	Jul-17	Aug-17	Sep-17
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 2016	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 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	<b>BNSF-GF</b>	(206)	n/a	n/a	n/a	50	n/a
	Change from last week	(6)	n/a	n/a	n/a	(213)	n/a
	Change from same week 2016	(16)	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	(375)	(300)	(175)	n/a	n/a	800
	Change from last week	(42)	0	0	n/a	n/a	n/a
	Change from same week 2016	(188)	(150)	(25)	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>**

April, 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	\$6	\$41.20	\$1.12	21
	Wichita, KS	Los Angeles, CA	\$6,950	\$31	\$69.32	\$1.89	3
	Wichita, KS	New Orleans, LA	\$4,408	\$89	\$44.66	\$1.22	6
	Sioux Falls, SD	Galveston-Houston, TX	\$6,686	\$25	\$66.64	\$1.81	6
	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
	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
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,634	\$67	\$36.75	\$1.00	-3
	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	\$18	\$39.43	\$1.07	6
	Wichita, KS	Galveston-Houston, TX	\$4,071	\$14	\$40.56	\$1.10	8
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	\$30	\$56.02	\$1.52	6
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$32	\$59.21	\$1.61	6
	Northwest KS	Portland, OR	\$5,643	\$160	\$57.63	\$1.57	6
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$37	\$50.02	\$1.27	5
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$34	\$49.59	\$1.26	5
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$101	\$35.57	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$20	\$36.94	\$0.94	7
	Des Moines, IA	Amarillo, TX	\$3,895	\$79	\$39.46	\$1.00	5
	Minneapolis, MN	Tacoma, WA	\$5,000	\$37	\$50.02	\$1.27	5
	Council Bluffs, IA	Stockton, CA	\$4,740	\$38	\$47.45	\$1.21	8
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$34	\$55.95	\$1.52	7
	Minneapolis, MN	Portland, OR	\$5,650	\$37	\$56.47	\$1.54	8
	Fargo, ND	Tacoma, WA	\$5,500	\$30	\$54.92	\$1.49	6
	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**

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel surcharge per car <sup>2</sup>	Tariff plus surcharge per:		Percent change <sup>4</sup> Y/Y
					metric ton <sup>3</sup>	bushel <sup>3</sup>	
Date: April, 2017							
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	\$42	\$43.93	\$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	\$138	\$82.23	\$2.09	2
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$135	\$75.64	\$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

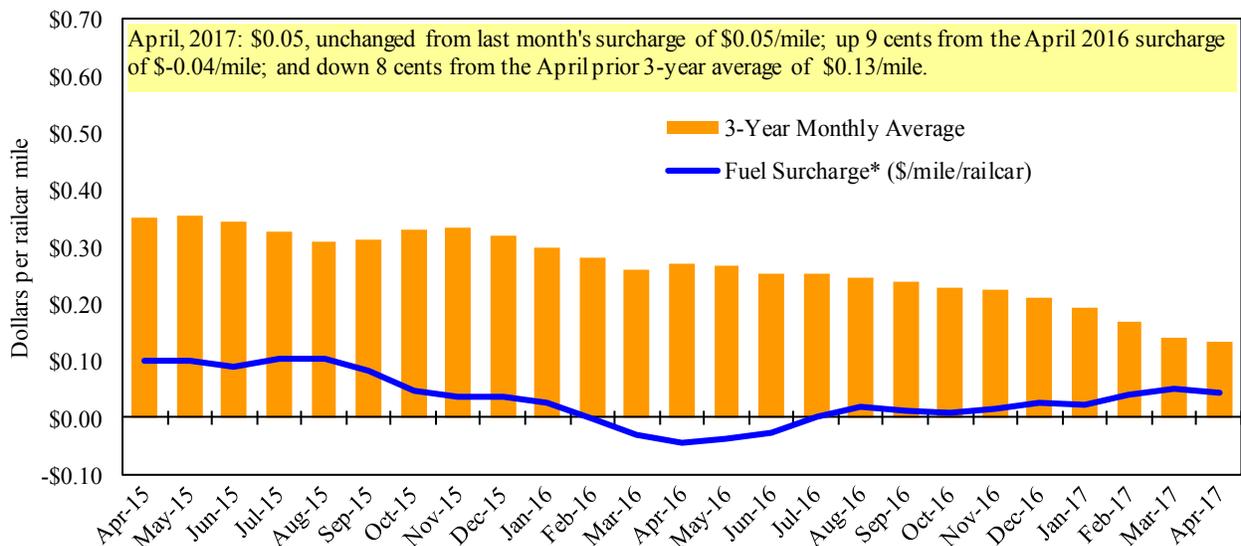
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

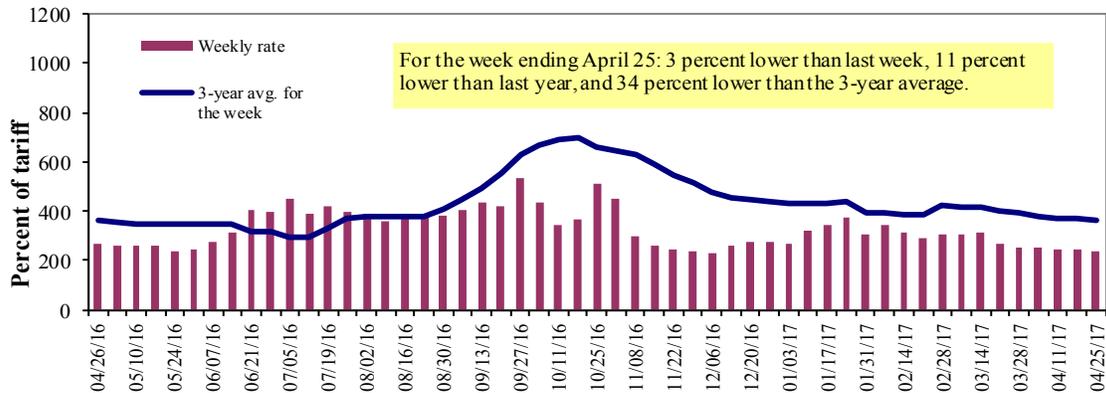
\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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>	4/25/2017	288	238	238	170	168	168	158
	4/18/2017	293	245	245	175	173	173	160
<b>\$/ton</b>	4/25/2017	17.83	12.66	11.04	6.78	7.88	6.79	4.96
	4/18/2017	18.14	13.03	11.37	6.98	8.11	6.99	5.02
<b>Current week % change from the same week:</b>								
	Last year	-15	-19	-11	-14	-16	-16	-17
	3-year avg. <sup>2</sup>	-31	-36	-34	-36	-40	-40	-32
<b>Rate<sup>1</sup></b>	May	288	242	242	173	173	173	160
	July	298	253	253	185	193	193	180

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

## Benchmark tariff rates

### Calculating barge rate per ton:

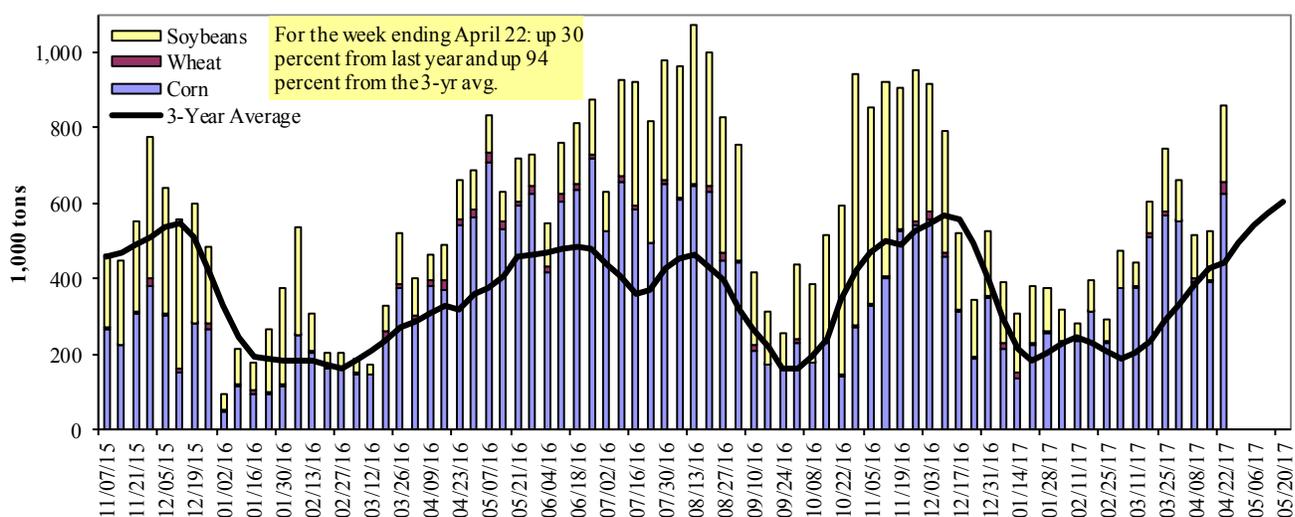
$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$

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 4/22/2017	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	269	9	129	0	408
Winfield, MO (L25)	390	23	166	2	580
Alton, IL (L26)	637	33	210	2	881
Granite City, IL (L27)	626	31	202	2	861
<b>Illinois River (L8)</b>	151	10	21	0	181
<b>Ohio River (L52)</b>	56	24	39	2	120
<b>Arkansas River (L1)</b>	4	28	17	0	49
Weekly total - 2017	686	83	257	3	1,030
Weekly total - 2016	628	31	133	5	796
2017 YTD <sup>1</sup>	7,426	702	4,135	133	12,396
2016 YTD	5,801	465	3,595	52	9,913
2017 as % of 2016 YTD	128	151	115	258	125
Last 4 weeks as % of 2016 <sup>2</sup>	110	153	138	81	118
Total 2016	24,136	2,030	16,668	344	43,178

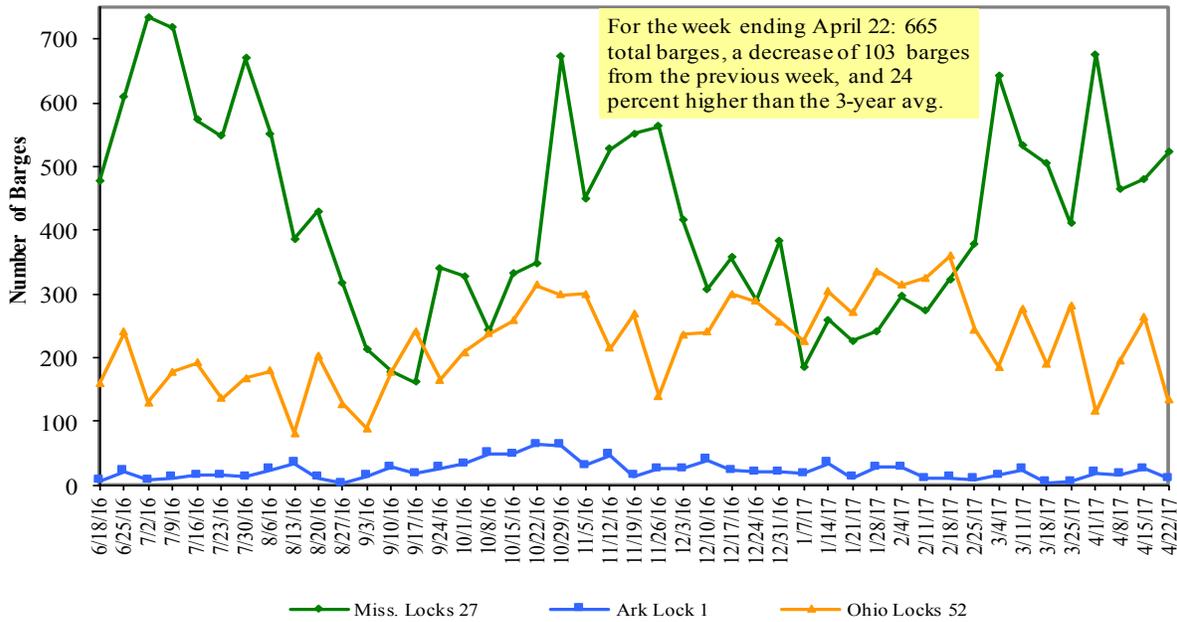
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

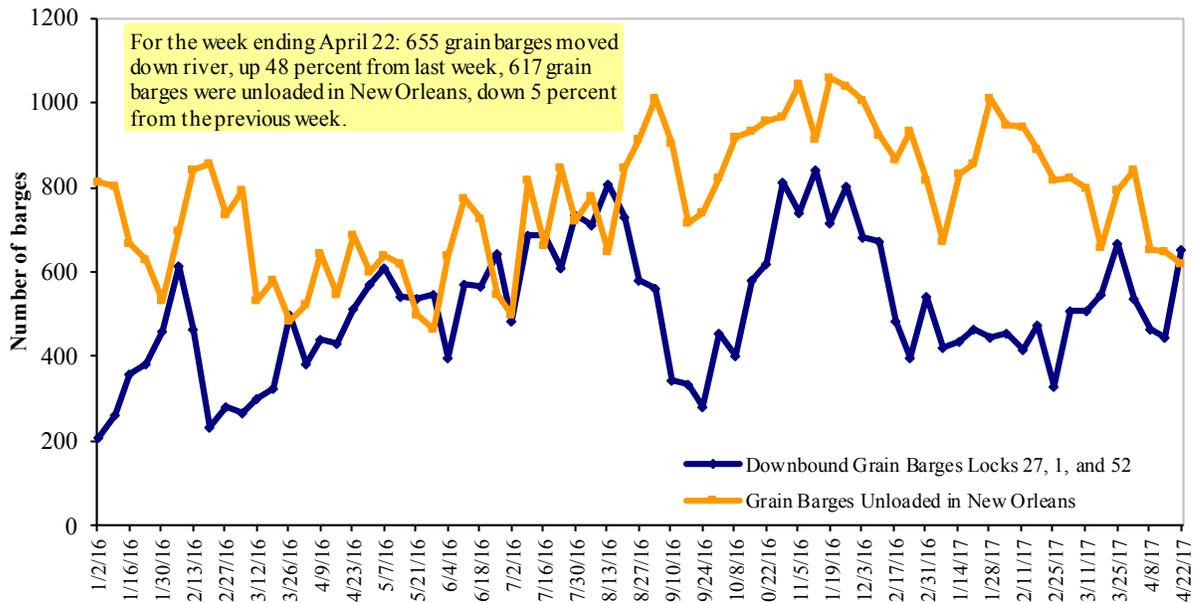
Source: U.S. Army Corps of Engineers

**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 4/24/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.632	0.001	0.388
	New England	2.650	0.012	0.359
	Central Atlantic	2.785	0.002	0.442
	Lower Atlantic	2.520	-0.002	0.361
II	Midwest <sup>2</sup>	2.530	-0.006	0.374
III	Gulf Coast <sup>3</sup>	2.458	0.000	0.384
IV	Rocky Mountain	2.662	0.010	0.460
V	West Coast	2.875	-0.002	0.469
	West Coast less California	2.786	-0.005	0.281
	California	2.947	0.001	0.665
Total	U.S.	2.595	-0.002	0.397

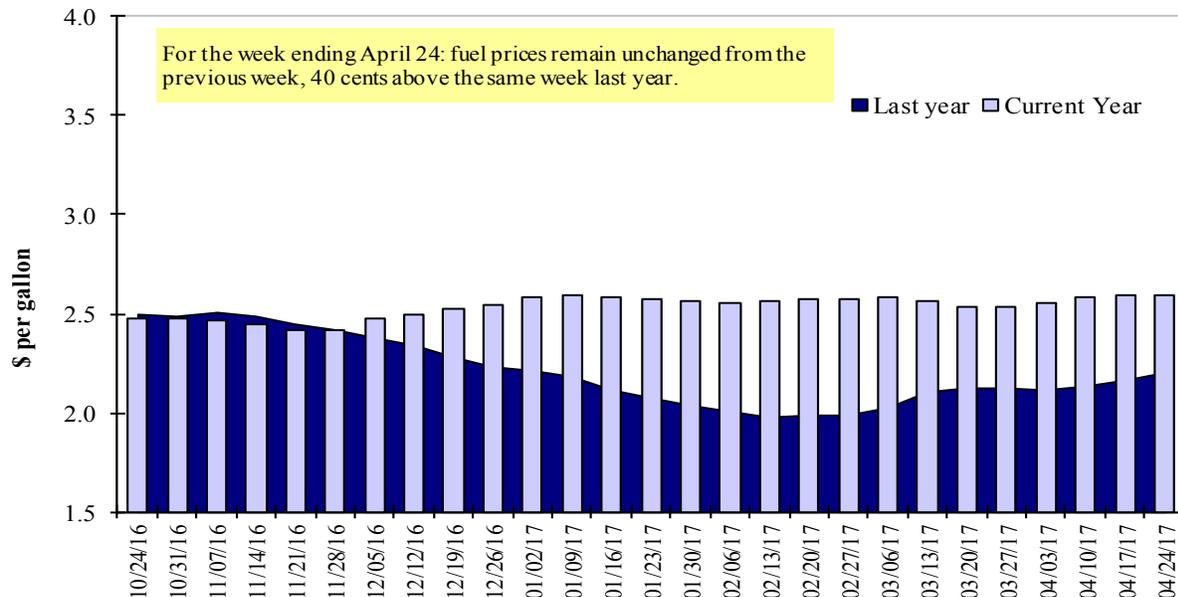
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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)

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>									
4/13/2017	1,881	407	1,691	1,325	129	5,433	15,444	7,130	28,007
This week year ago	752	352	998	665	79	2,845	12,663	3,477	18,985
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2016/17 YTD	9,646	2,016	6,760	3,420	378	22,220	34,613	48,571	105,403
2015/16 YTD	4,813	2,772	5,503	3,097	619	16,803	22,264	41,641	80,709
YTD 2016/17 as % of 2015/16	200	73	123	110	61	132	155	117	131
Last 4 wks as % of same period 2015/16	265	136	186	203	141	203	128	218	156
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 4/13/2017	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	12,115	11,161	9	11,204
Japan	9,724	6,787	43	11,284
Korea	5,044	1,345	275	3,931
Colombia	3,856	3,947	(2)	4,134
Peru	2,532	1,538	65	2,109
<b>Top 5 Importers</b>	<b>33,270</b>	<b>24,778</b>	<b>34</b>	<b>32,662</b>
<b>Total US corn export sales</b>	<b>50,056</b>	<b>34,927</b>	<b>43</b>	<b>46,633</b>
% of Projected	88%	72%		
Change from prior week <sup>2</sup>	<b>756</b>	<b>1,203</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	66%	71%		70%
<b>USDA forecast, April 2017</b>	<b>56,616</b>	<b>48,295</b>	<b>17</b>	
<b>Corn Use for Ethanol USDA forecast, April 2017</b>	<b>138,430</b>	<b>132,690</b>	<b>4</b>	

<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 4/13/2017	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	35,451	27,028	31	29,033
Mexico	3,319	3,029	10	3,295
Indonesia	1,720	1,440	19	2,065
Japan	1,841	1,940	(5)	1,994
Netherlands	1,484	1,353	10	1,644
<b>Top 5 importers</b>	<b>43,816</b>	<b>34,789</b>	<b>26</b>	<b>38,032</b>
<b>Total US soybean export sales</b>	<b>55,701</b>	<b>45,119</b>	<b>23</b>	<b>48,389</b>
% of Projected	101%	86%		
Change from prior week <sup>2</sup>	<b>211</b>	<b>408</b>		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>79%</b>	<b>77%</b>		<b>79%</b>
<b>USDA forecast, April 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](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/>. 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](http://www.fas.usda.gov/export-sales/myfi_rpt.htm). (Carry over plus Accumulated Exports)

Table 15

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

For the week ending 4/13/2017	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	2,679	2,419	11	2,743
Mexico	3,150	2,225	42	2,660
Philippines	2,540	2,146	18	2,156
Brazil	1,215	429	183	2,076
Nigeria	1,559	1,455	7	1,978
Korea	1,350	1,131	19	1,170
China	1,357	728	86	1,770
Taiwan	1,040	1,045	(0)	1,005
Indonesia	1,078	524	106	776
Colombia	822	616	33	679
<b>Top 10 importers</b>	<b>16,791</b>	<b>12,718</b>	<b>32</b>	<b>17,013</b>
<b>Total US wheat export sales</b>	<b>27,653</b>	<b>19,648</b>	<b>41</b>	<b>24,485</b>
% of Projected	99%	93%		
Change from prior week <sup>2</sup>	<b>414</b>	<b>328</b>		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>61%</b>	<b>65%</b>		<b>69%</b>
<b>USDA forecast, April 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](http://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 outstanding and/or accumulated sales<sup>3</sup> FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://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 04/20/17	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	388	335	116	4,359	3,697	118	137	127	12,325
Corn	464	363	128	4,723	2,512	188	130	136	12,009
Soybeans	221	70	314	3,757	4,401	85	611	191	14,447
<b>Total</b>	<b>1,073</b>	<b>768</b>	<b>140</b>	<b>12,839</b>	<b>10,611</b>	<b>121</b>	<b>153</b>	<b>138</b>	<b>38,782</b>
<b>Mississippi Gulf</b>									
Wheat	15	202	8	1,465	1,087	135	155	123	3,480
Corn	778	717	108	12,337	8,511	145	120	104	31,420
Soybeans	309	207	149	9,797	8,760	112	202	204	35,278
<b>Total</b>	<b>1,102</b>	<b>1,127</b>	<b>98</b>	<b>23,598</b>	<b>18,358</b>	<b>129</b>	<b>139</b>	<b>123</b>	<b>70,178</b>
<b>Texas Gulf</b>									
Wheat	157	163	96	2,147	827	260	387	161	6,019
Corn	30	0	n/a	316	251	126	121	170	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
<b>Total</b>	<b>187</b>	<b>163</b>	<b>115</b>	<b>2,464</b>	<b>1,170</b>	<b>211</b>	<b>314</b>	<b>162</b>	<b>8,792</b>
<b>Interior</b>									
Wheat	41	21	199	574	402	143	115	100	1,543
Corn	150	219	68	2,199	1,916	115	124	135	7,197
Soybeans	91	117	78	1,608	1,322	122	122	134	4,577
<b>Total</b>	<b>283</b>	<b>357</b>	<b>79</b>	<b>4,381</b>	<b>3,640</b>	<b>120</b>	<b>122</b>	<b>129</b>	<b>13,317</b>
<b>Great Lakes</b>									
Wheat	43	0	n/a	70	40	177	158	237	1,186
Corn	0	0	n/a	0	21	0	0	0	584
Soybeans	26	0	n/a	53	0	n/a	n/a	2799	910
<b>Total</b>	<b>70</b>	<b>0</b>	<b>n/a</b>	<b>123</b>	<b>60</b>	<b>203</b>	<b>190</b>	<b>191</b>	<b>2,681</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	37	151	24	3	2	315
Corn	0	0	n/a	5	14	38	n/a	10	294
Soybeans	21	74	28	787	817	96	301	201	2,269
<b>Total</b>	<b>21</b>	<b>75</b>	<b>28</b>	<b>829</b>	<b>981</b>	<b>84</b>	<b>196</b>	<b>84</b>	<b>2,878</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	645	721	89	8,652	6,204	139	162	129	24,867
Corn	1,422	1,300	109	19,581	13,224	148	123	113	53,173
Soybeans	668	469	142	16,001	15,392	104	218	189	58,587
<b>Total</b>	<b>2,735</b>	<b>2,490</b>	<b>110</b>	<b>44,234</b>	<b>34,821</b>	<b>127</b>	<b>148</b>	<b>130</b>	<b>136,627</b>

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

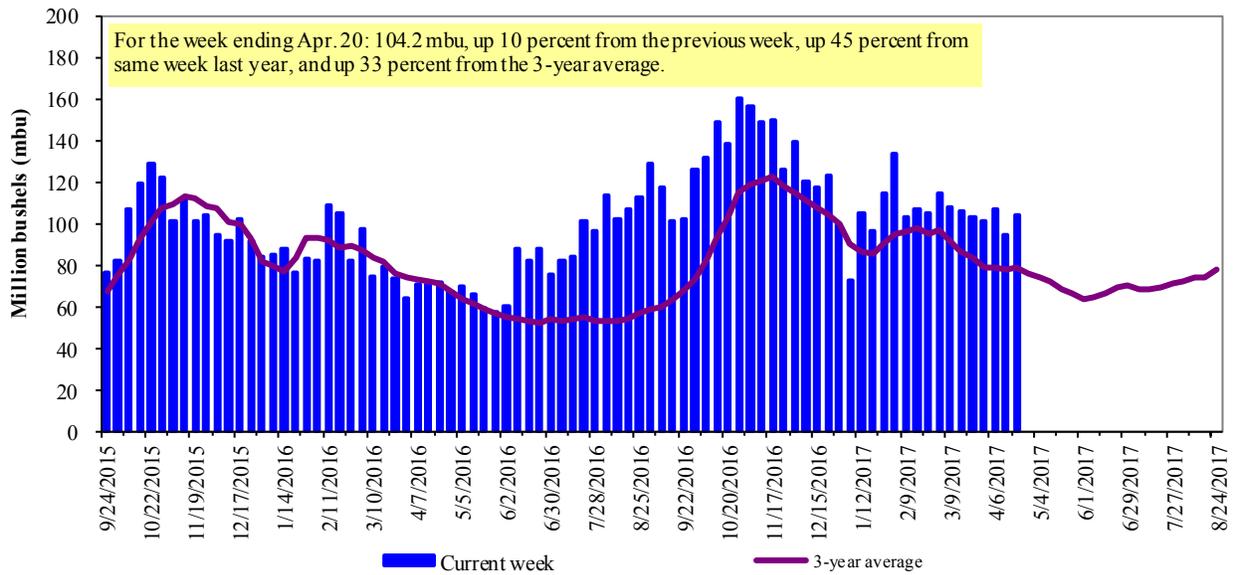
Source: Grain Inspection, Packers and Stockyards Administration/USDA ([www.gipsa.usda.gov](http://www.gipsa.usda.gov)); YTD= year-to-date; n/a = not applicable

<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

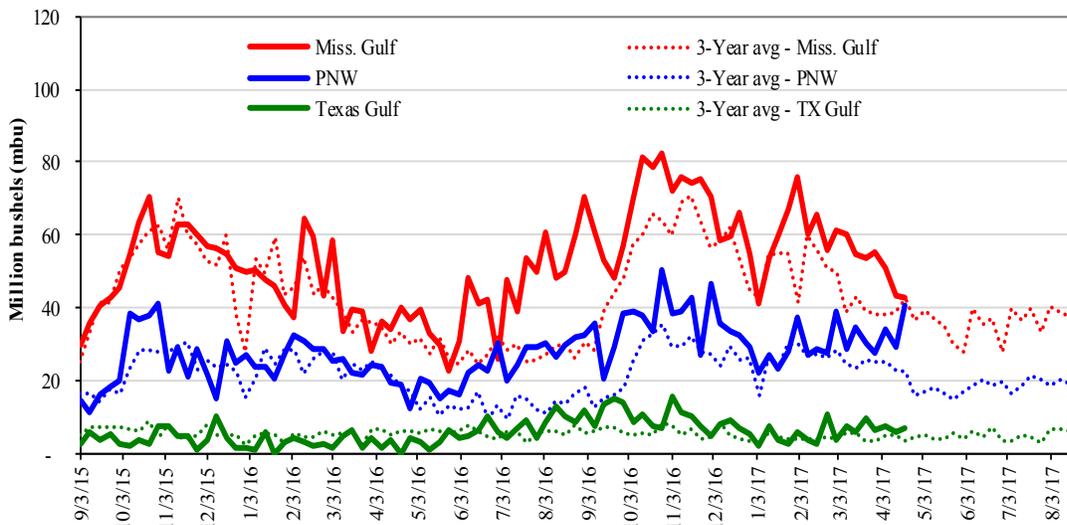
**U.S. grain inspected for export (wheat, corn, and soybeans)**



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)**



<u>Week ending 04/20/17 inspections (mbu):</u>		<u>Percent change from:</u>				
Mississippi Gulf:	42.5	Last Week:	MS Gulf: down 2	TX Gulf: up 16	U.S. Gulf: unchanged	PNW: up 39
PNW:	40.7	Last Year (same week):	up 6	n/a	up 24	up 119
Texas Gulf:	7.0	3-yr avg. (4-wk. mov. Avg):	up 8	up 70	up 14	up 71

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

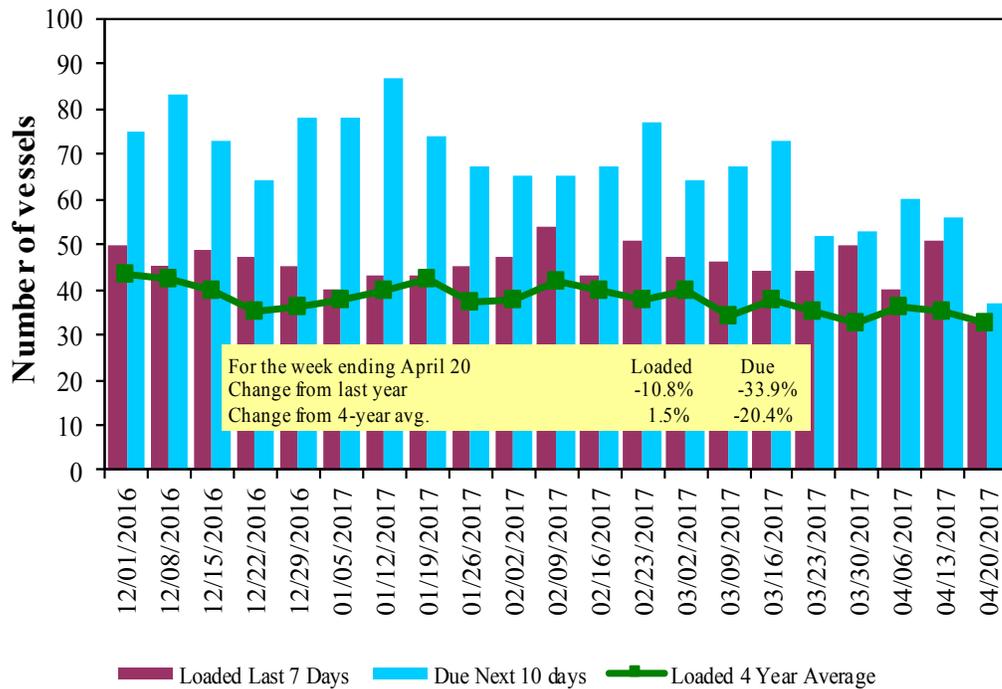
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/20/2017	40	33	37	20	n/a
4/13/2017	38	51	56	20	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

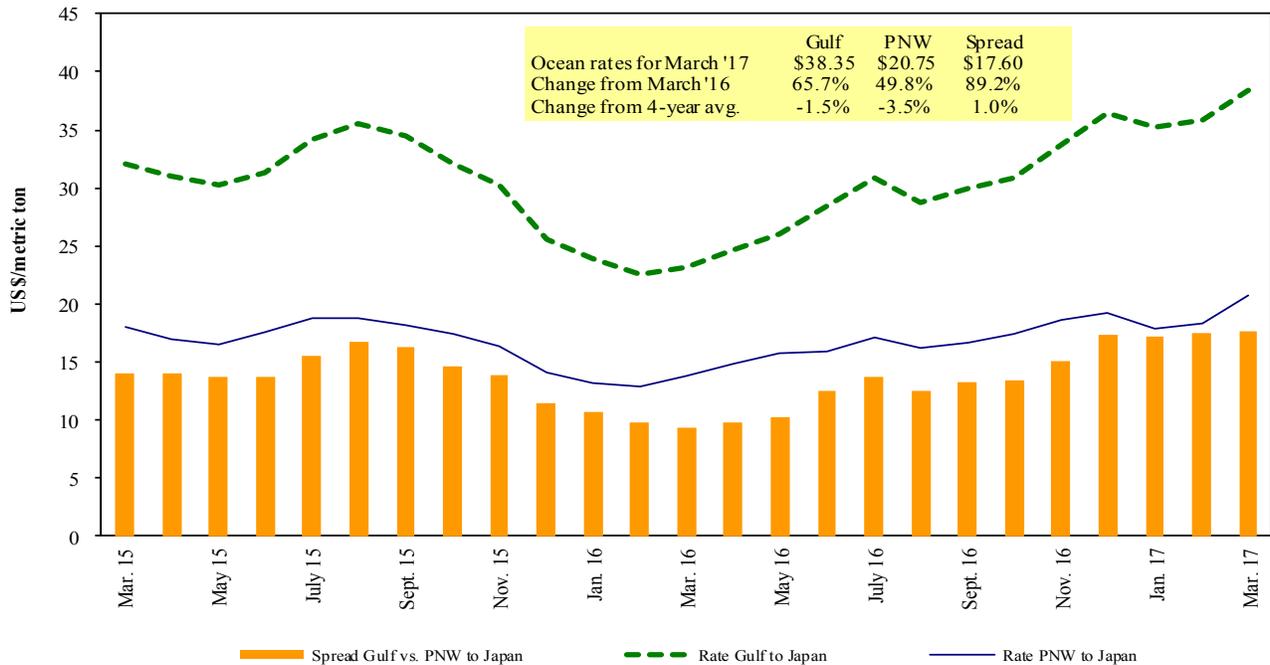
**U.S. Gulf Vessel Loading Activity**



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 04/22/2017**

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*
PNW	Taiwan	Wheat	Jun 9/23	48,425	29.70
PNW	Taiwan	Wheat	May 6/20	52,500	28.48
PNW	Taiwan	Wheat	Apr 19/May 3	50,350	29.12
Brazil	China	Heavy Grain	Apr 11/17	60,000	29.75
Brazil	China	Heavy Grain	Apr 10/15	60,000	31.00
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	South Korea	Heavy Grain	Mar 15/Apr 15	65,000	23.50
EC S. America	China	Heavy Grain	May 20/30	60,000	29.75
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
Kavkaz	Tunisia	Wheat	Apr 3/10	25,000	16.75
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	Conakry	Milled Rice	Apr 15/25	10,400	75.00*
U.S. Gulf	Northern China	Heavy Grain	Mar 15/20	53,000	39.00

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

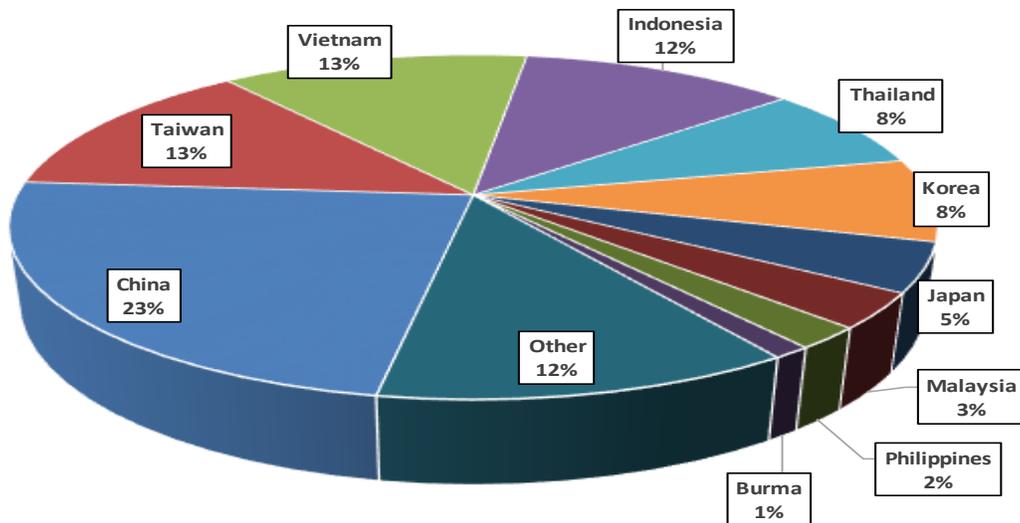
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 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-December 2016**

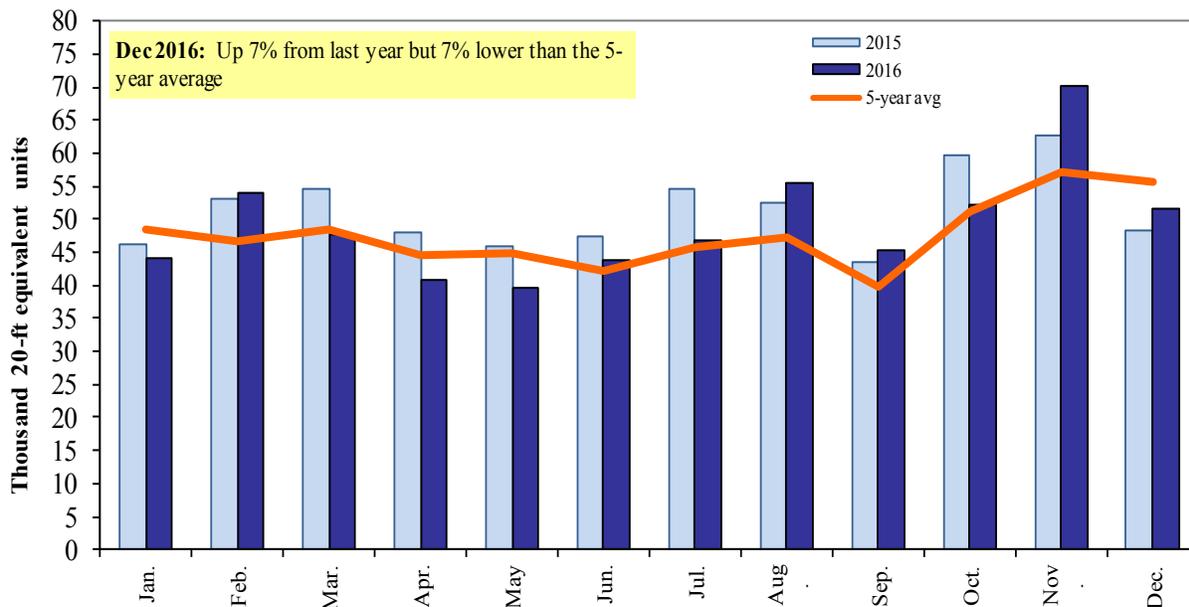


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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