

# Grain Transportation Report

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

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December 21, 2017

## WEEKLY HIGHLIGHTS

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#### Rock Removal Activities Delaying Mississippi River Barge Traffic

On December 13, U.S. Army Corps of Engineers (Corps) began rock removal dredging operations on the Mississippi River near Thebes, IL, in an area of the river 38 to 46 miles above the confluence of the Ohio River. The Corps will remove potential hazards to navigation that could stop traffic during extremely low water events. The rocks (sometimes called “pinnacles”) became an issue starting in late 2012 through early 2013, when river levels were so low the submerged pinnacles could have prevented safe navigation in that area due to historically low drafts in that section of the river. During January 2013, partial rock removal operations and timely regional rainfall made water levels safe for navigation. However, due to the rainfall not all the planned rock removal could occur. Because water levels have declined again to make the work possible, these operations are now being resumed by the Corps. Presently, the U.S. Coast Guard will stop all traffic while work is being done, which is during daylight hours, 7 days a week. During non-work hours at night, traffic will not be restricted.

#### Wheat and Soybeans Boost Total Grain Inspections

For the week ending December 14, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 3.07 million metric tons (mmt), up 29 percent from the previous week, down 2 percent from the same time last year, and unchanged from the 3-year average. The increase in total grain inspections was due primarily to a 65 percent jump in wheat inspections and a 44 percent increase in soybean inspections. Week-to-week shipments of wheat and soybeans to Asia were also up notably. Inspections of corn, however, decreased 17 percent from the past week, as shipments to Latin America decreased. Increased Asian demand for U.S. grain also helped grain inspections jump 40 percent from the previous week in the Mississippi Gulf and 9 percent in the Pacific Northwest (PNW). Current outstanding (unshipped) export sales are up for wheat, corn and soybeans

#### Private Sector National Seaport Information Portal Needed to Increase Efficiency

The commercial development of a National Seaport Information Portal to share critical supply chain information is one of the key recommendations that Commissioner Rebecca Dye highlighted in the [Final Report on the Federal Maritime Commission’s Supply Chain Innovation Teams](#). Commissioner Dye also recommended that the Commission: (1) continue to sponsor working groups to address commercial challenges such as container availability; (2) promote and encourage academic and industry-sponsored commercial supply chain research and supply chain mapping, especially for U.S. exports; and (3) continue to actively engage with port directors and others to encourage development of commercial solutions to supply system challenges.

### Snapshots by Sector

#### Export Sales

For the week ending December 7, **unshipped balances** of wheat, corn, and soybeans totaled 34.2 mmt, down 20 percent from the same time last year. Net weekly **wheat export sales** were .589 mmt, up 83 percent from the previous week. Net **corn export sales** were .867 mmt, down 1 percent from the previous week, and net **soybean export sales** were 1.5 mmt for the same period, down 25 percent from the previous week.

#### Rail

U.S. Class I railroads originated 23,735 **grain carloads** for the week ending December 9, down 8 percent from the previous week, down 3 percent from last year, and down 2 percent from the 3-year average.

Average December shuttle **secondary railcar** bids/offers per car were \$100 above tariff for the week ending December 14, up \$241 from last week. There were no shuttle bids/offers this week last year. Average non-shuttle secondary railcar bids/offers per car were \$146 below tariff. There were no non-shuttle bids/offers last week or this week last year.

#### Barge

For the week ending December 16, **barge grain movements** totaled 809,724 tons, 0.3 percent lower than the previous week, and up 6 percent from the same period last year.

For the week ending December 16, 515 grain barges **moved down river**, down 2 percent from last week. 922 grain barges were **unloaded in New Orleans**, 36 percent higher than the previous week.

#### Ocean

For the week ending December 14, 39 **ocean-going grain vessels** were loaded in the Gulf, 20 percent less than the same period last year. Fifty-four vessels are expected to be loaded within the next 10 days, 26 percent less than the same period last year.

For the week ending December 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$45.50 per metric ton, up 3 percent from the previous week. The cost of shipping from the PNW to Japan was \$25.25 per metric ton, up 2 percent from the previous week.

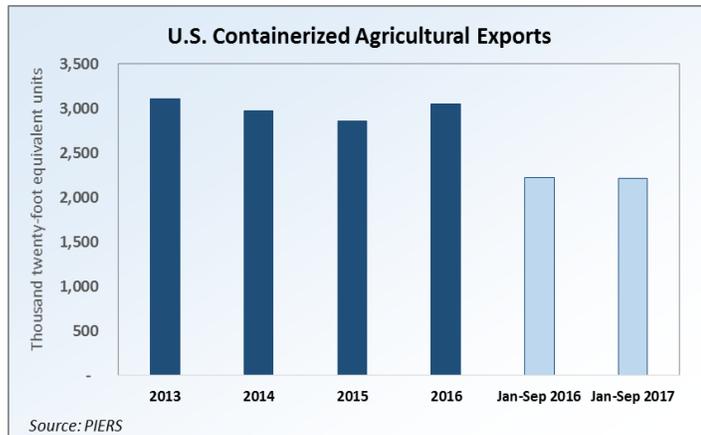
#### Fuel

During the week ending December 18, average **diesel fuel prices** decreased 1 cent from the previous week at \$2.90 per gallon, 37 cents above the same week last year.

# Feature Article/Calendar

## Global Container Market Update 2017: Strong Year-to-Date Agricultural Volumes

U.S. agricultural exporters rely heavily on the containerized ocean transportation industry, which serves the global marketplace that is bigger and much broader than the agricultural sector, as important as it is. In 2016, more than 22 percent by tonnage and 47 percent by value of U.S. waterborne agricultural exports moved in containers. From January to September of this year, containerized agricultural exports were just 1 percent, or 11,881 twenty-foot equivalent units (TEUs), shy of movements during the same time last year (see figure). Shipments started the year strong, up 4 percent during the first quarter, but second



Commodity	TEU	Percent change from 2016
Animal feed	432,785	-19%
Grocery items	280,234	-10%
Soybeans	169,884	23%
Meat	167,939	6%
Cotton	140,207	63%
Poultry	132,566	2%
Vegetables	114,632	1%
Edible nuts	76,261	-12%
Grain products	59,385	22%
Fruit	57,807	12%
Other	578,922	3%
<b>Total</b>	<b>2,210,622</b>	<b>-1%</b>

Source: PIERS

quarter shipments increased by only 1 percent and third quarter shipments fell 6 percent. Much of the export losses this year were because of the Chinese import tax on distiller's dried grains (DDGS) shipments and reduced livestock feed demand in Vietnam (see table and December 7, 2017 *Grain Transportation Report*). The top containerized agricultural export is animal feed (see table), which includes hay, DDGS, and other feed products. Hay exports fell slightly so far this year—2 percent compared with 2016. However, containerized soybean exports have been strong, increasing 23 percent over 2016.

Typically the last quarter of the calendar year is the busiest for containerized agricultural exports, particularly containerized grain products because of the recent harvest season. However, non-agricultural containerized exports and import cargo typically slow down during the final quarter of the year, as the peak holiday shipping season has passed. Less demand for container service during the fourth quarter often reduces ocean freight rates, but also prompts carriers to reduce vessel fleet capacity to balance supply and demand. However, this year carriers have not responded in the normal pattern so the usual trends could be altered as the last quarter unfolds.

### Vessel Capacity and Rates

The major global ocean container carriers have seen a profitable year in 2017. Global container volume has been strong in major trade lanes, particularly the largest global trade lane, Asia-Europe. Carriers have also seen productivity and efficiency gains from the newly restructured vessel sharing alliances, which began in April of this year. However, as the year comes to a close, shipments have tapered, which puts downward pressure on rates and draws attention to vessel fleet overcapacity. This time of year, carriers will traditionally remove excess vessels temporarily from their operating fleet to balance ship capacity with overall volume demand, a practice called "laying up" vessels. However, industry analysts report this year's laying up activities are historically low, saying it is likely the result of a profitable year with solid volume growth. Some analysts also blame the low laying up figures on the largest global ocean container carrier not reducing its fleet capacity in an effort to regain market share lost during a cyber security breach earlier this year.

The global volume growth in 2017 absorbed some of the excess vessel capacity in the market, but overcapacity persists. According to the December *Drewry's Shipping Insight report*, newly built vessel deliveries in 2017 were stronger than 2016, but still relatively slow. However, Drewry reports big increases being scheduled for 2018, with the number of vessel deliveries expected to increase 368 percent over 2017. Drewry reports the following vessel categories as having the largest increases—Handysize (up 26,000 TEU), Intermediate (up 119,000 TEU), Very Large (up 607,000 TEU) and Ultra Large (up 547,000 TEU). The combined increases in the numbers for these categories is pushing the total container capacity growth in 2018 up by more than 600 percent.

Because of the persistent excess capacity, most agricultural shippers report ocean freight rates have been reasonable this year. Average ocean spot rates for major U.S. transpacific westbound trade lanes increased 6 percent over the past 12 months ending November 2017. However, with overall slow demand for container service in the United States during the last quarter, some deterioration of spot rates could happen through the end of the year. [April.Taylor@ams.usda.gov](mailto:April.Taylor@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
12/20/17	195	264	218	203	179
12/13/17	195	272	207	198	176

<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)

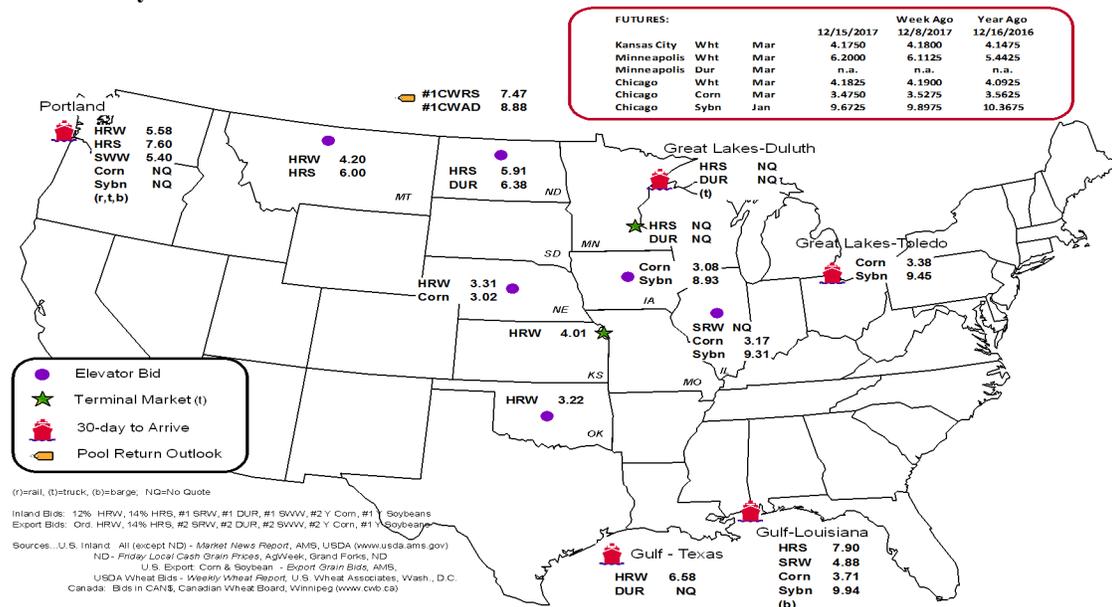
Commodity	Origin--Destination	12/15/2017	12/8/2017
Corn	IL--Gulf	-0.54	-0.59
Corn	NE--Gulf	-0.69	-0.74
Soybean	IA--Gulf	-1.01	-1.29
HRW	KS--Gulf	-2.57	-2.60
HRS	ND--Portland	-1.69	-1.76

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
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico <sup>3</sup>
12/13/2017 <sup>p</sup>	360	784	7,120	399	8,663	12/9/2017	1,705
12/06/2017 <sup>f</sup>	453	790	7,460	291	8,994	12/2/2017	1,810
2017 YTD <sup>f</sup>	28,054	73,745	276,965	21,310	400,074	2017 YTD	115,224
2016 YTD <sup>f</sup>	35,434	83,674	287,704	26,940	433,752	2016 YTD	103,554
2017 YTD as % of 2016 YTD	79	88	96	79	92	% change YTD	111
Last 4 weeks as % of 2016 <sup>2</sup>	31	40	89	35	69	Last 4wks % 2016	98
Last 4 weeks as % of 4-year avg <sup>2</sup>	24	53	100	35	77	Last 4wks % 4 yr	112
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.

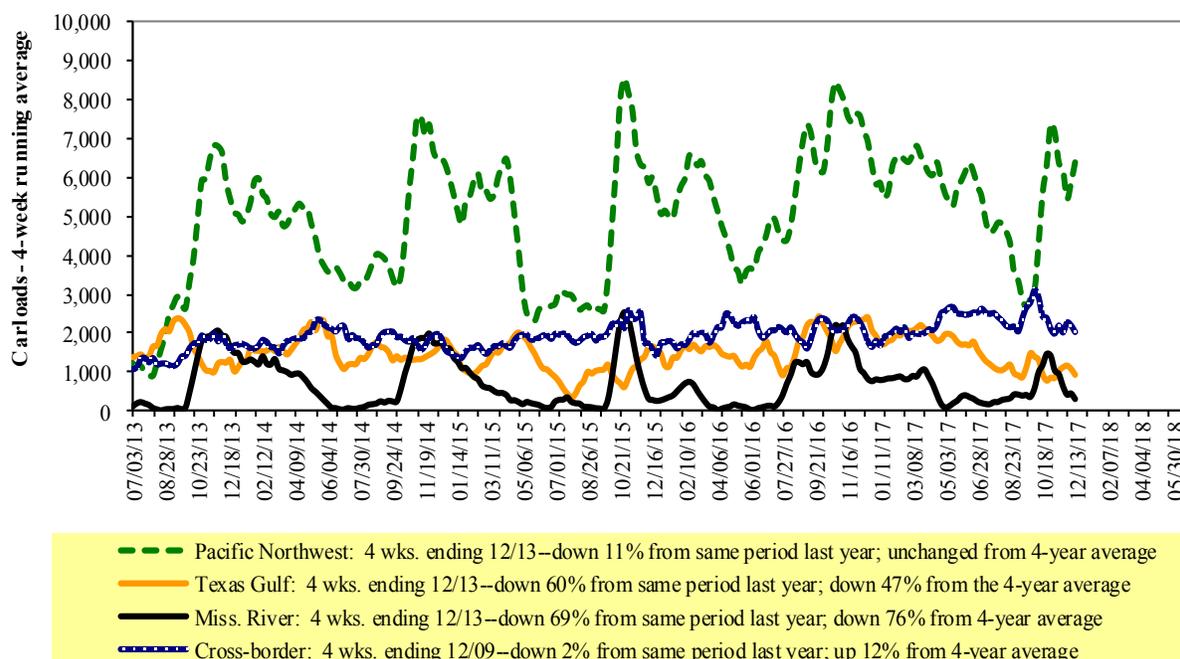
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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: 12/9/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,842	2,824	12,993	1,070	5,006	23,735	3,689	5,850
This week last year	1,814	3,014	11,961	1,407	6,264	24,460	4,221	3,876
2017 YTD	84,288	135,809	546,363	47,838	274,939	1,089,237	188,316	231,800
2016 YTD	89,136	143,036	557,358	43,073	283,864	1,116,467	182,745	221,013
2017 YTD as % of 2016 YTD	95	95	98	111	97	98	103	105
Last 4 weeks as % of 2016*	107	85	97	101	81	92	84	100
Last 4 weeks as % of 3-yr avg**	97	90	104	113	88	98	81	101
Total 2016	95,179	150,848	590,779	45,246	300,836	1,182,888	193,714	234,738

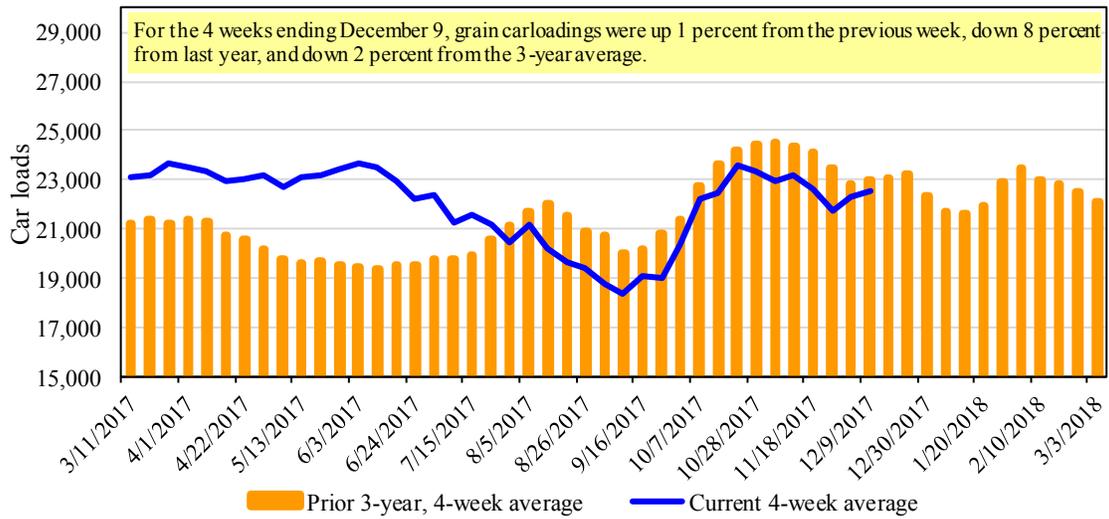
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*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: 12/14/2017		Delivery period							
		Dec-17	Dec-16	Jan-18	Jan-17	Feb-18	Feb-17	Mar-18	Mar-17
BNSF <sup>3</sup>	COT grain units	no bids	n/a	0	5	no bids	0	no bids	no bids
	COT grain single-car <sup>5</sup>	0	n/a	1	43	0	13	0	13
UP <sup>4</sup>	GCAS/Region 1	no offer	n/a	no bids	no bids	no bids	no bids	n/a	no offer
	GCAS/Region 2	no offer	n/a	10	no bids	10	no bids	n/a	no offer

<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.

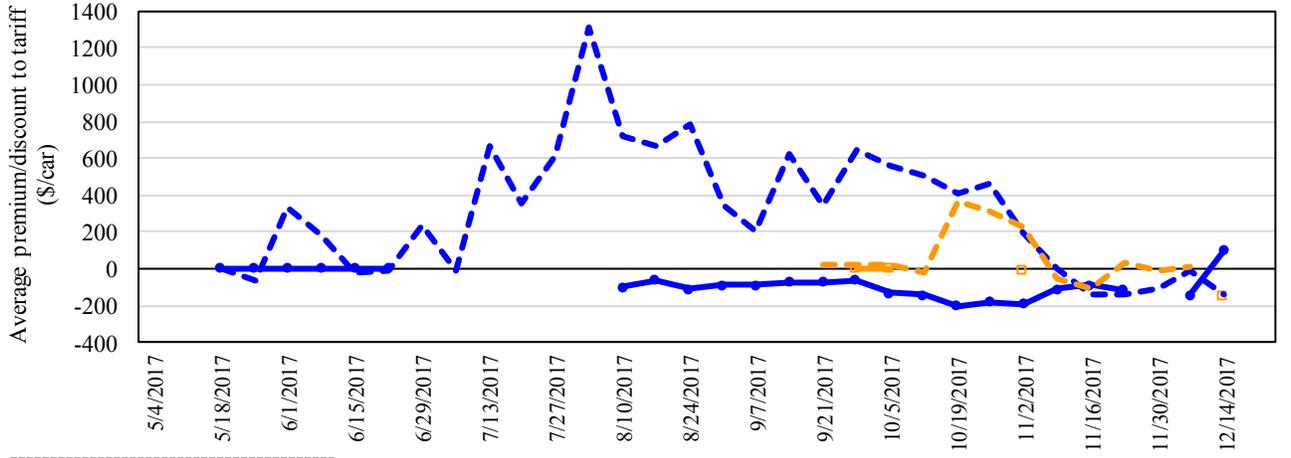
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

<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 December 2017, Secondary Market**

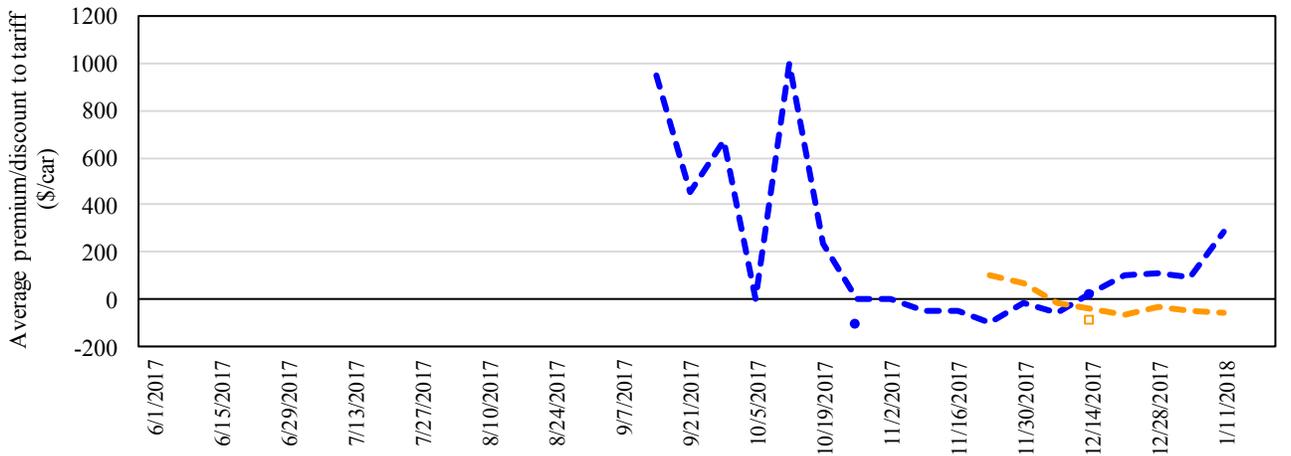


	<b>BNSF</b>	<b>UP</b>
<b>Non-Shuttle</b>	-\$117	-\$175
<b>Shuttle</b>	n/a	\$100

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are \$146 below the peak. Average Shuttle bids/offers rose \$241 this week and are at the peak.

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 January 2018, Secondary Market**



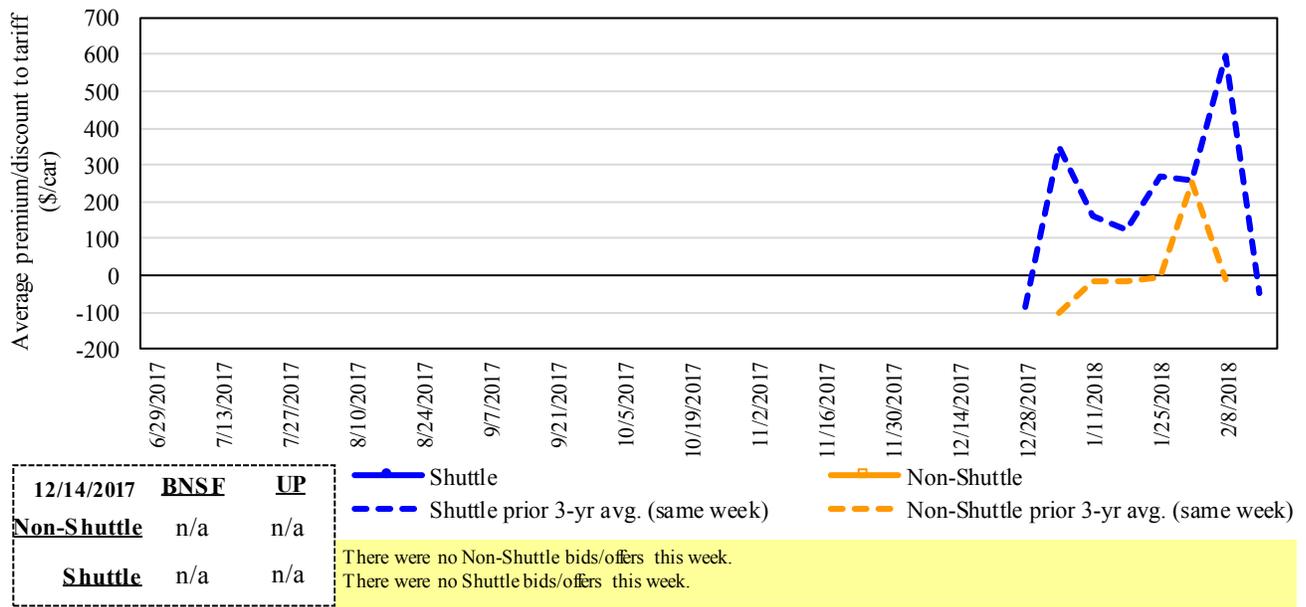
	<b>BNSF</b>	<b>UP</b>
<b>Non-Shuttle</b>	\$25	-\$200
<b>Shuttle</b>	n/a	\$25

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are at the peak. There were no Shuttle bids/offers last week. Average Shuttle bids/offers this week are at the peak.

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 February 2018, Secondary Market**



12/14/2017	<b>BNSF</b>	<b>UP</b>
<b>Non-Shuttle</b>	n/a	n/a
<b>Shuttle</b>	n/a	n/a

— Shuttle  
- - - Shuttle prior 3-yr avg. (same week)  
— Non-Shuttle  
- - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week.  
 There were no Shuttle bids/offers this week.

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: 12/14/2017		Delivery period					
		Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18
<b>Non-shuttle</b>	<b>BNSF-GF</b>	(117)	25	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>	(175)	(200)	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>Shuttle</b>	<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>	100	25	n/a	n/a	n/a	n/a
Change from last week	388	n/a	n/a	n/a	n/a	n/a	
Change from same week 2016	n/a	25	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>**

December, 2017	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	\$71	\$39.26	\$1.07	4	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0	
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1	
	Wichita, KS	New Orleans, LA	\$4,540	\$125	\$46.32	\$1.26	4	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$137	\$49.18	\$1.34	4	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$190	\$51.75	\$1.41	5	
	Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$141	\$40.44	\$1.03	8
		Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
		Des Moines, IA	Davenport, IA	\$2,258	\$30	\$22.72	\$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	\$88	\$36.71	\$0.93	3
	Soybeans	Des Moines, IA	Los Angeles, CA	\$5,327	\$255	\$55.43	\$1.41	4
Minneapolis, MN		New Orleans, LA	\$3,631	\$127	\$37.32	\$1.02	2	
Toledo, OH		Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5	
Indianapolis, IN		Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5	
Indianapolis, IN		Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5	
Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$141	\$48.52	\$1.32	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	8	
	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	\$224	\$59.94	\$1.63	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	\$141	\$38.45	\$0.98	9	
Lincoln, NE		Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0	
Des Moines, IA		Amarillo, TX	\$3,970	\$110	\$40.52	\$1.03	3	
Minneapolis, MN		Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
Council Bluffs, IA		Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2	
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	\$162	\$49.03	\$1.33	7	
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3	
Grand Island, NE	Portland, OR	\$5,710	\$229	\$58.98	\$1.61	6		

<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**

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change <sup>4</sup> Y/Y	
				surcharge per car <sup>2</sup>	Tariff plus surcharge per:		
					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	\$98	\$68.75	\$1.87	1
	KS	Guadalajara, JA	\$7,309	\$285	\$77.59	\$2.11	5
	TX	Salinas Victoria, NL	\$4,292	\$60	\$44.46	\$1.21	3
Corn	IA	Guadalajara, JA	\$8,313	\$248	\$87.47	\$2.22	3
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$205	\$83.97	\$2.13	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$200	\$77.44	\$1.97	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$231	\$85.47	\$2.32	-5
	NE	Guadalajara, JA	\$8,692	\$250	\$91.37	\$2.48	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$180	\$78.36	\$2.13	1
Sorghum	NE	Celaya, GJ	\$7,345	\$226	\$77.36	\$1.96	4
	KS	Queretaro, QA	\$7,819	\$122	\$81.14	\$2.06	3
	NE	Salinas Victoria, NL	\$6,452	\$98	\$66.92	\$1.70	4
	NE	Torreon, CU	\$6,790	\$172	\$71.13	\$1.80	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.

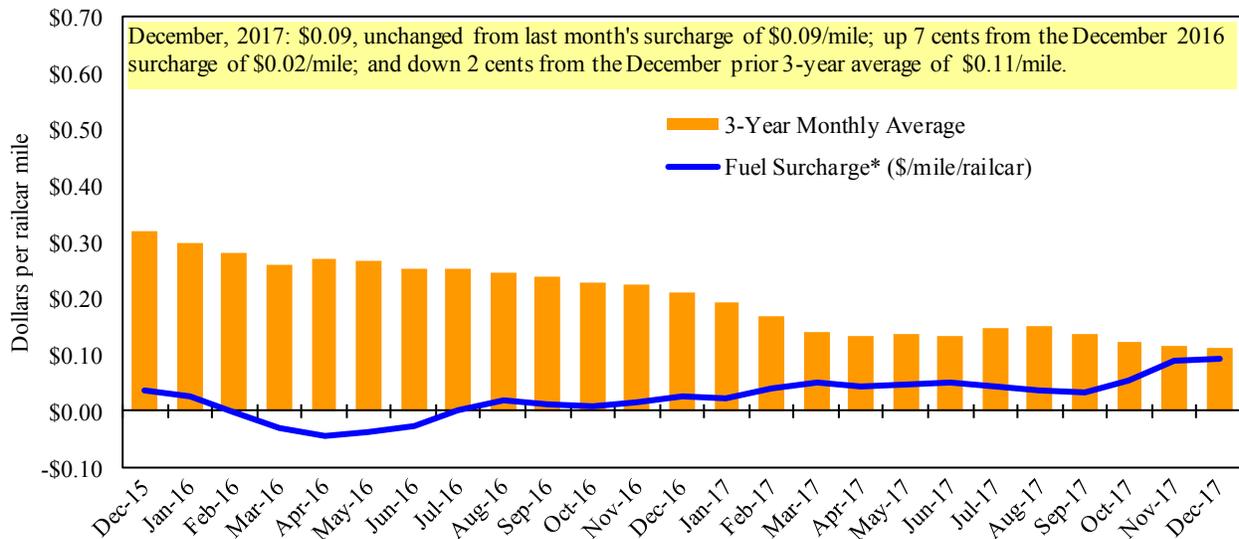
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

<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.

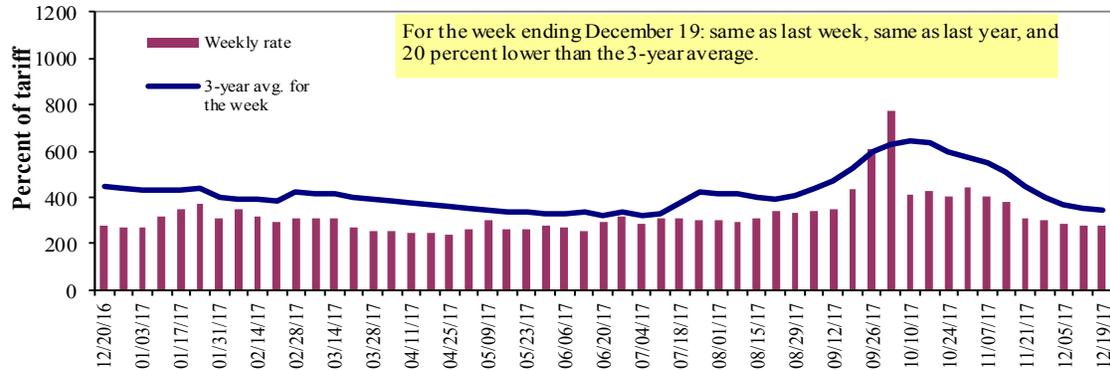
\*\* CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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>	12/19/2017	-	-	278	222	269	269	183
	12/12/2017	-	-	278	208	300	300	175
<b>\$/ton</b>	12/19/2017	-	-	12.90	8.86	12.62	10.87	5.75
	12/12/2017	-	-	12.90	8.30	14.07	12.12	5.50
<b>Current week % change from the same week:</b>								
	Last year	-	-	0	18	22	22	9
	3-year avg. <sup>2</sup>	-	-	-20	-8	-4	-4	-15
<b>Rate<sup>1</sup></b>	January	-	-	295	218	253	253	185
	March	-	315	280	208	219	219	179

<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

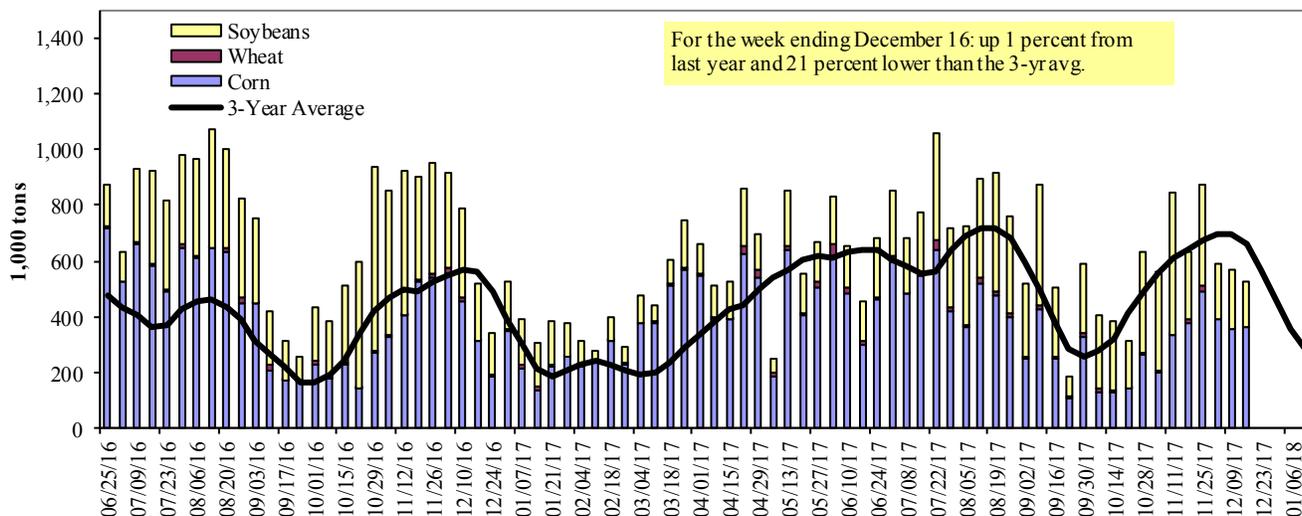
#### Calculating barge rate per ton:

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

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 12/16/2017	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	9	0	3	0	12
Winfield, MO (L25)	164	0	129	10	302
Alton, IL (L26)	364	0	157	10	530
Granite City, IL (L27)	361	0	163	10	534
<b>Illinois River (L8)</b>	158	0	31	0	190
<b>Ohio River (L52)</b>	43	2	182	0	227
<b>Arkansas River (L1)</b>	0	14	35	0	49
Weekly total - 2017	404	16	380	10	810
Weekly total - 2016	359	17	373	17	766
2017 YTD <sup>1</sup>	21,618	2,139	15,580	353	39,690
2016 YTD	23,496	1,963	15,971	335	41,765
2017 as % of 2016 YTD	92	109	98	105	95
Last 4 weeks as % of 2016 <sup>2</sup>	85	67	83	259	85
Total 2016	24,136	2,030	16,668	344	43,178

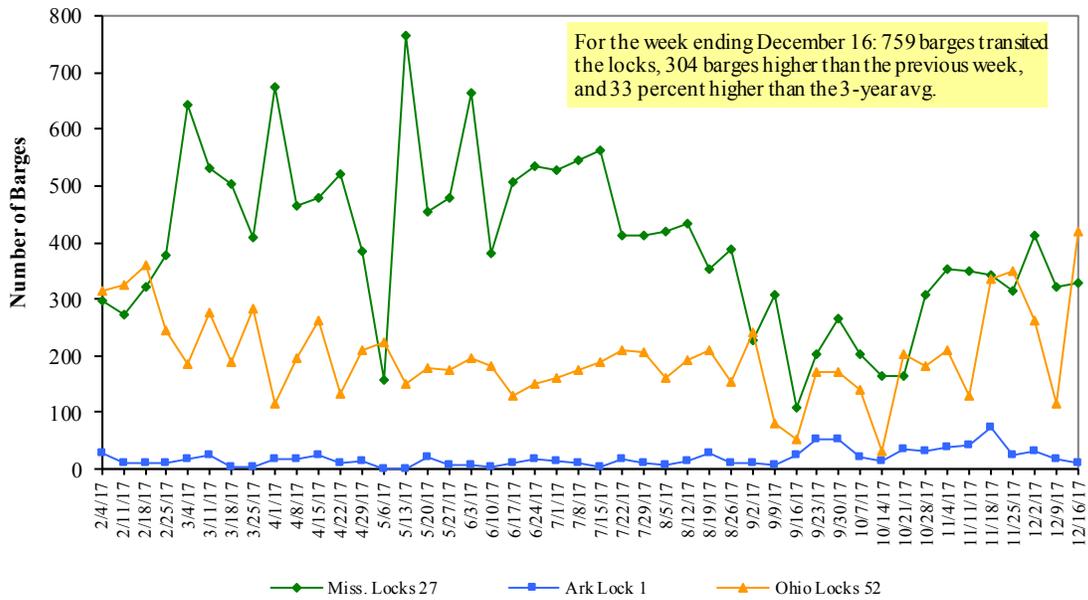
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

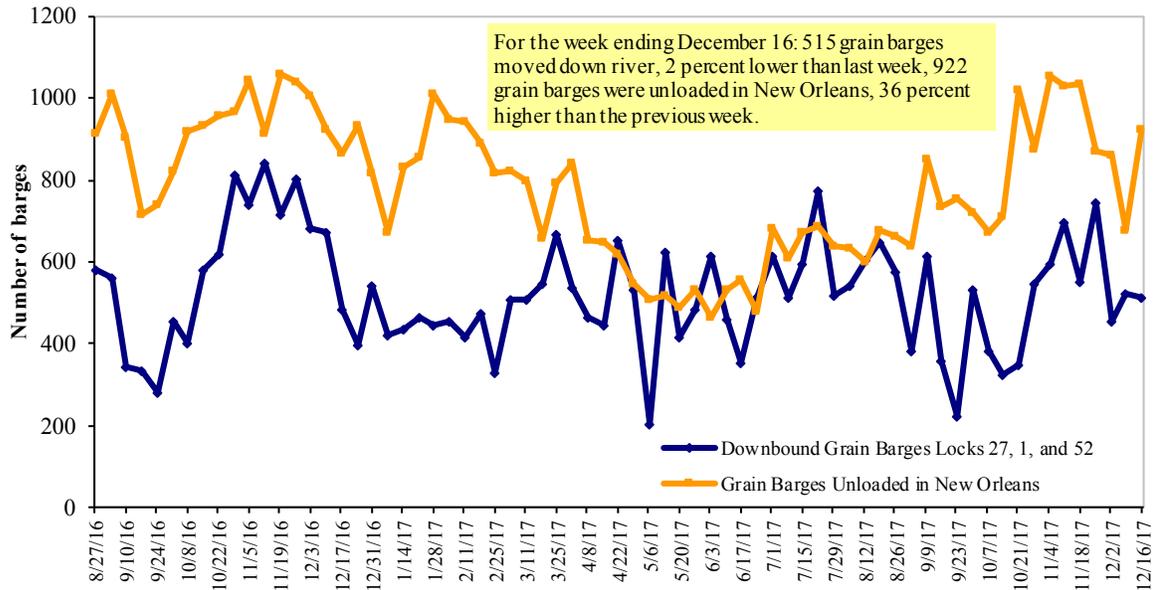
Source: U.S. Army Corps of Engineers

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, Week Ending 12/18/2017 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.897	-0.004	0.338
	New England	2.924	0.024	0.337
	Central Atlantic	3.060	0.000	0.393
	Lower Atlantic	2.778	-0.010	0.308
II	Midwest <sup>2</sup>	2.853	-0.010	0.374
III	Gulf Coast <sup>3</sup>	2.697	-0.008	0.287
IV	Rocky Mountain	2.958	-0.033	0.463
V	West Coast	3.327	-0.017	0.539
	West Coast less California	3.044	-0.028	0.339
	California	3.552	-0.008	0.698
Total	U.S.	2.901	-0.009	0.374

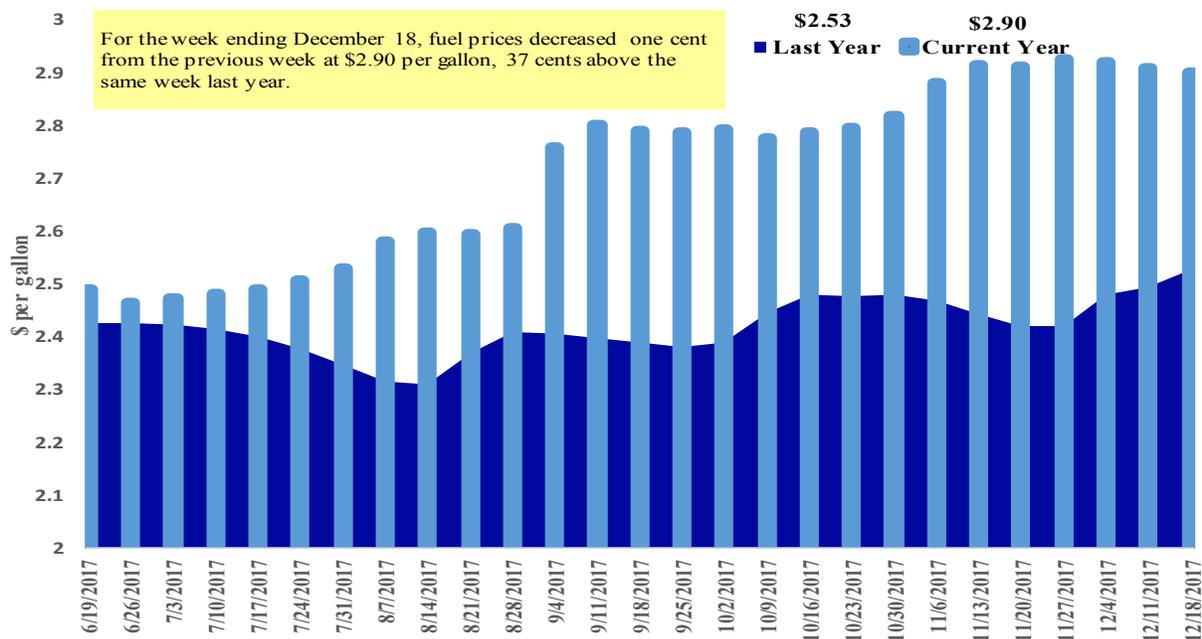
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
12/7/2017	2,146	560	1,706	1,267	59	5,738	14,989	13,493	34,220
This week year ago	2,001	626	2,442	1,192	169	6,430	19,164	17,279	42,872
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2017/18 YTD	5,024	1,112	3,227	2,764	211	12,337	8,777	24,301	45,416
2016/17 YTD	5,967	1,120	3,978	2,207	200	13,471	13,930	27,820	55,220
YTD 2017/18 as % of 2016/17	84	99	81	125	106	92	63	87	82
Last 4 wks as % of same period 2016/17	102	86	68	110	35	87	77	79	79
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 12/7/2017			% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2014-2016 - 1,000 mt -
	2017/18 Current MY	2016/17 Last MY		
Mexico	8,947	9,093	(2)	12,297
Japan	3,952	4,347	(9)	11,450
Korea	1,015	2,904	(65)	4,494
Colombia	1,675	2,070	(19)	4,179
Peru	1,442	1,461	(1)	2,693
<b>Top 5 Importers</b>	<b>17,031</b>	<b>19,874</b>	<b>(14)</b>	<b>35,113</b>
<b>Total US corn export sales</b>	<b>23,766</b>	<b>33,094</b>	<b>(28)</b>	<b>49,308</b>
% of Projected	49%	57%		
Change from prior week <sup>2</sup>	<b>867</b>	<b>1,516</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	72%	60%		71%
<b>USDA forecast, December 2017</b>	<b>48,982</b>	<b>58,346</b>	<b>(16)</b>	
<b>Corn Use for Ethanol USDA forecast, December 2017</b>	<b>140,335</b>	<b>138,151</b>	<b>2</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 12/7/2017	Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	21,529	28,572	(25)	31,881
Mexico	1,924	1,914	1	3,452
Indonesia	853	876	(3)	1,987
Japan	1,121	1,148	(2)	2,067
Netherlands	726	525	0	2,098
<b>Top 5 importers</b>	<b>26,154</b>	<b>33,034</b>	<b>(21)</b>	<b>41,486</b>
<b>Total US soybean export sales</b>	<b>37,794</b>	<b>45,098</b>	<b>(16)</b>	<b>52,919</b>
% of Projected	62%	76%		
Change from prior week <sup>2</sup>	<b>1,453</b>	<b>2,008</b>		
<b>Top 5 importers' share of U.S. soybean export sales</b>	69%	73%		<b>78%</b>
<b>USDA forecast, December 2017</b>	<b>61,308</b>	<b>59,237</b>	<b>103</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/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. (Carry over plus Accumulated Exports)

Table 15

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

For the week ending 12/7/2017	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,006	1,847	9	2,620
Mexico	2,205	1,910	15	2,743
Philippines	2,070	1,946	6	2,395
Brazil	111	1,081	(90)	862
Nigeria	809	952	(15)	1,254
Korea	1,224	1,012	21	1,104
China	782	793	(1)	1,623
Taiwan	852	734	16	768
Indonesia	856	657	30	726
Colombia	488	610	(20)	635
<b>Top 10 importers</b>	<b>11,403</b>	<b>11,541</b>	<b>(1)</b>	<b>14,729</b>
<b>Total US wheat export sales</b>	<b>18,075</b>	<b>19,900</b>	<b>(9)</b>	<b>22,804</b>
% of Projected	68%	69%		
Change from prior week <sup>2</sup>	<b>589</b>	<b>531</b>		
<b>Top 10 importers' share of U.S. wheat export sales</b>	63%	58%		65%
<b>USDA forecast, December 2017</b>	<b>26,567</b>	<b>28,747</b>	<b>(8)</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/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.

Table 16

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

Port Regions	For the Week Ending 12/14/17	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	409	248	165	14,293	11,845	121	126	141	12,325
Corn	105	117	90	10,480	11,700	90	29	62	12,009
Soybeans	419	491	85	12,704	13,584	94	97	98	14,447
<b>Total</b>	<b>932</b>	<b>856</b>	<b>109</b>	<b>37,477</b>	<b>37,129</b>	<b>101</b>	<b>90</b>	<b>105</b>	<b>38,782</b>
<b>Mississippi Gulf</b>									
Wheat	45	41	109	4,122	3,374	122	96	89	3,480
Corn	296	413	72	28,052	30,396	92	76	90	31,420
Soybeans	1,168	622	188	31,275	33,207	94	83	82	35,278
<b>Total</b>	<b>1,508</b>	<b>1,076</b>	<b>140</b>	<b>63,449</b>	<b>66,978</b>	<b>95</b>	<b>81</b>	<b>85</b>	<b>70,178</b>
<b>Texas Gulf</b>									
Wheat	85	44	192	6,143	5,749	107	53	70	6,019
Corn	0	22	0	733	1,631	45	25	43	1,669
Soybeans	73	0	n/a	292	1,083	27	38	41	1,105
<b>Total</b>	<b>158</b>	<b>66</b>	<b>237</b>	<b>7,168</b>	<b>8,463</b>	<b>85</b>	<b>45</b>	<b>58</b>	<b>8,792</b>
<b>Interior</b>									
Wheat	33	40	83	1,674	1,479	113	150	131	1,543
Corn	180	153	118	8,496	6,975	122	120	154	7,197
Soybeans	87	135	65	5,277	4,428	119	99	104	4,577
<b>Total</b>	<b>301</b>	<b>328</b>	<b>92</b>	<b>15,447</b>	<b>12,882</b>	<b>120</b>	<b>114</b>	<b>130</b>	<b>13,317</b>
<b>Great Lakes</b>									
Wheat	45	0	n/a	686	1,146	60	53	68	1,186
Corn	3	0	n/a	192	584	33	5	12	584
Soybeans	0	22	0	847	868	98	60	44	910
<b>Total</b>	<b>48</b>	<b>22</b>	<b>221</b>	<b>1,724</b>	<b>2,598</b>	<b>66</b>	<b>47</b>	<b>51</b>	<b>2,681</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	46	289	16	n/a	3	315
Corn	0	0	n/a	32	293	11	937	954	294
Soybeans	121	29	424	1,857	2,061	90	78	74	2,269
<b>Total</b>	<b>121</b>	<b>29</b>	<b>424</b>	<b>1,935</b>	<b>2,644</b>	<b>73</b>	<b>79</b>	<b>72</b>	<b>2,878</b>
<b>U.S. total from ports</b>									
Wheat	616	373	165	26,963	23,882	113	99	111	24,867
Corn	584	705	83	47,985	51,580	93	70	94	53,173
Soybeans	1,868	1,298	144	52,251	55,231	95	86	85	58,587
<b>Total</b>	<b>3,068</b>	<b>2,377</b>	<b>129</b>	<b>127,200</b>	<b>130,694</b>	<b>97</b>	<b>83</b>	<b>91</b>	<b>136,627</b>

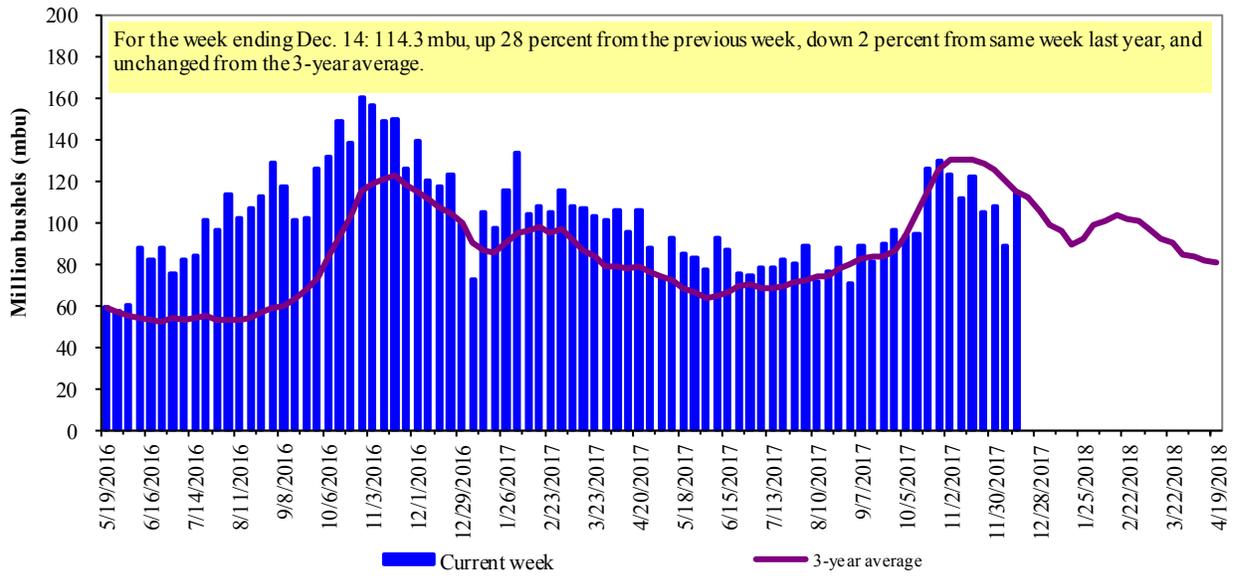
<sup>1</sup> Data includes revisions from prior weeks; some regional and U.S. totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 58 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2016.

Figure 14

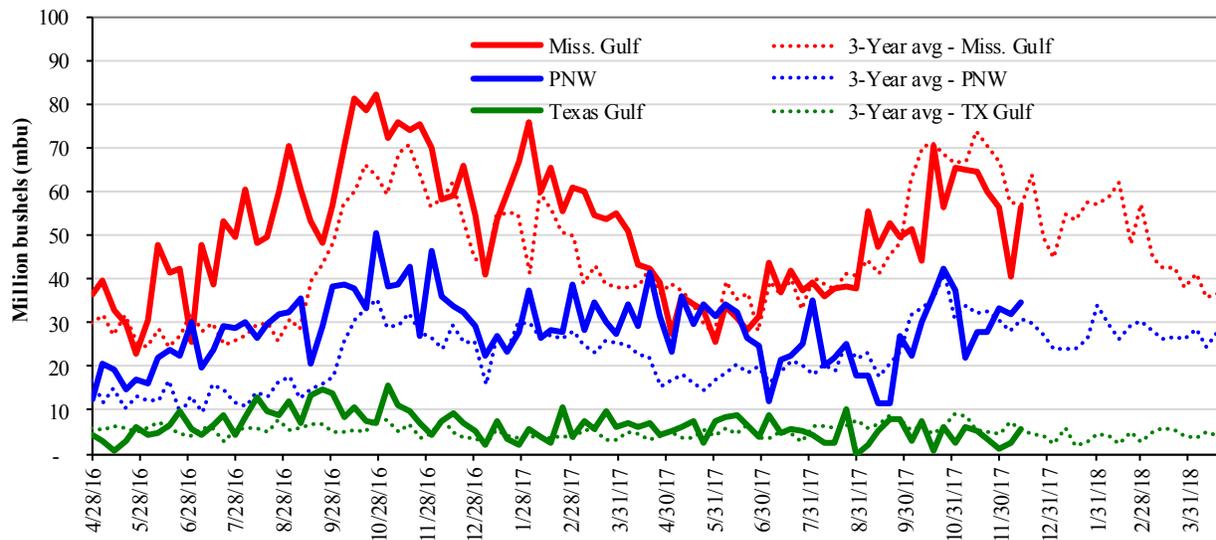
**U.S. grain inspected for export (wheat, corn, and soybeans)**



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 12/14/17 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf: 56.2	Last Week:	up 38	up 132	up 44	up 9
PNW: 34.5	Last Year (same week):	down 5	down 36	down 9	up 3
Texas Gulf: 5.8	3-yr avg. (4-wk. mov. Avg):	down 11	up 5	down 9	up 13

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

# Ocean Transportation

Table 17

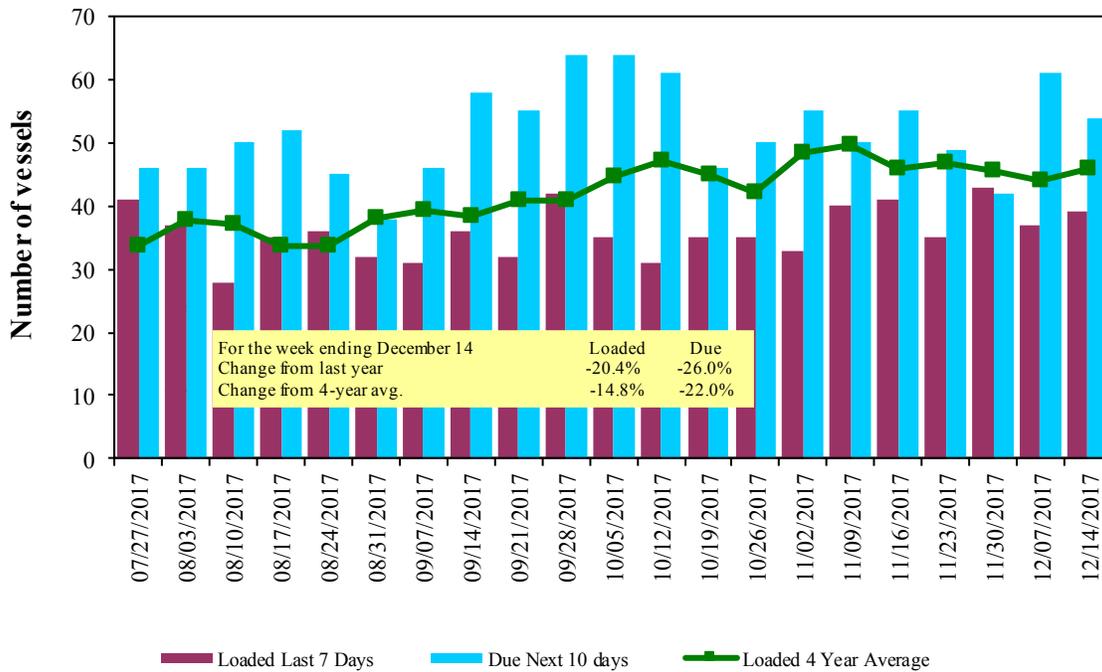
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/14/2017	34	39	54	15
12/7/2017	38	37	61	9
2016 range	(21..62)	(27..55)	(40..87)	(6..27)
2016 avg.	43	40	62	15

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

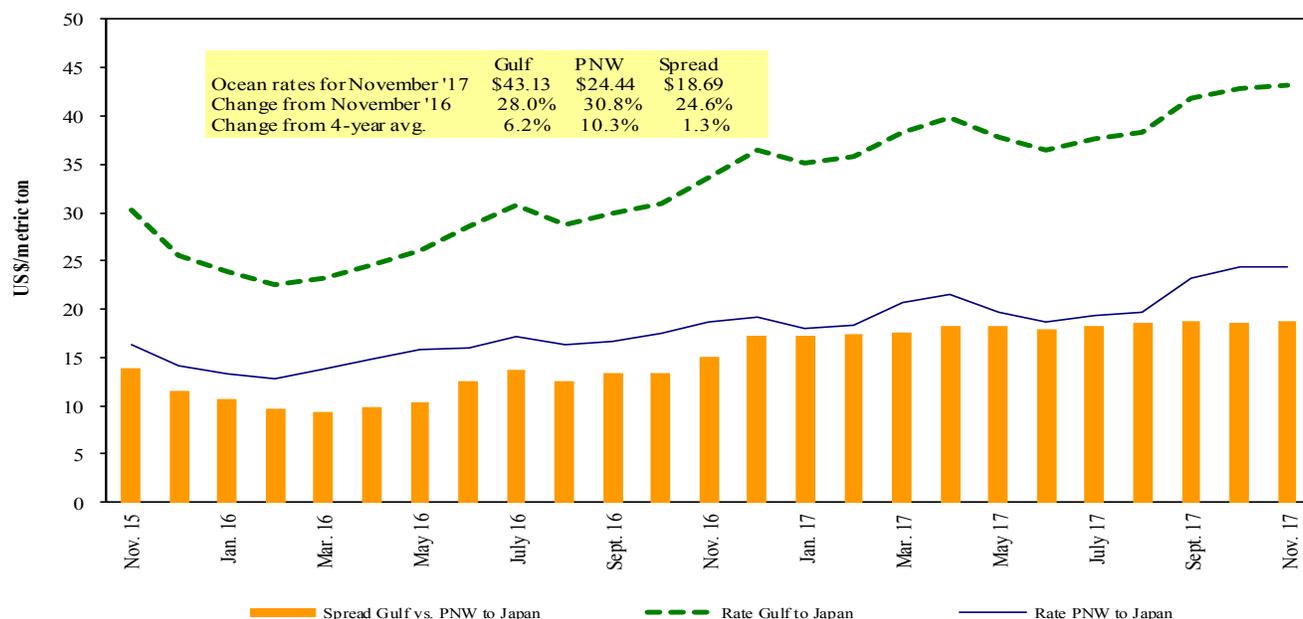
**U.S. Gulf Vessel Loading Activity**



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 12/16/2017**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 1/10	60,000	45.50
U.S. Gulf	China	Heavy Grain	Dec 15/20	60,000	44.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	43.25
U.S. Gulf	China	Heavy Grain	Nov 27/Dec 5	47,700	40.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	China	Heavy Grain	Nov 10/15	66,000	40.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.75
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.50
U.S. Gulf	Dakar	Wheat	Nov 20/30	7,500	73.89*
U.S. Gulf	Somali	Sorghum	Dec 1/10	10,640	192.10*
PNW	China	Heavy Grain	Dec 15/24	60,000	23.75
PNW	South Korea	Heavy Grain	Dec 14/20	60,000	24.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	31.90
Brazil	China	Heavy Grain	Nov 20/30	60,000	33.75
Brazil	China	Heavy Grain	Nov 1/10	60,000	31.90
Brazil	China	Heavy Grain	Oct 25/Nov 10	60,000	32.50
Brazil	S. Korea	Heavy Grain	Nov 22/29	63,000	33.25

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

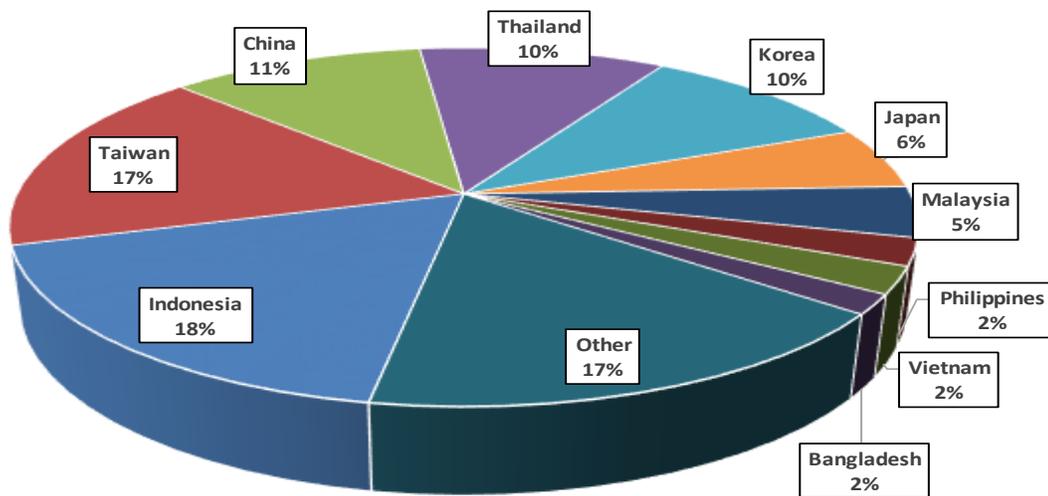
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-September 2017**

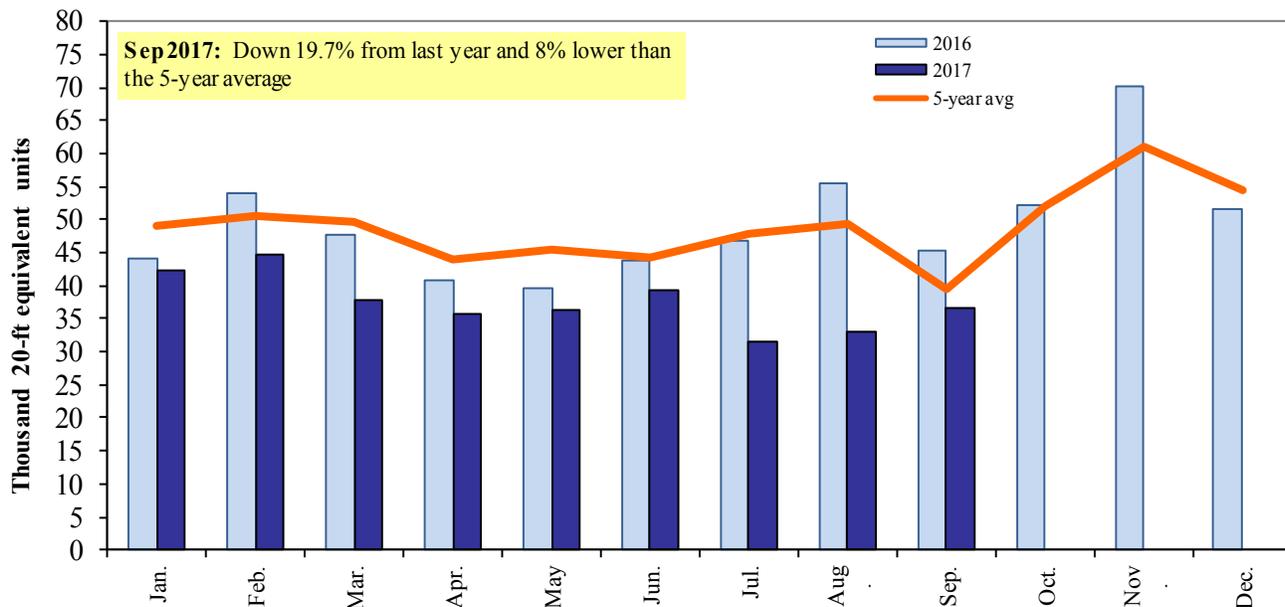


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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

Figure 19

**Monthly Shipments of Containerized Grain to Asia**



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

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

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