



# Grain Transportation Report

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

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## WEEKLY HIGHLIGHTS

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#### Bulk Ocean Freight Rates Continued to Slide

Ocean freight rates for shipping bulk grains continued their fall into the new year. As of January 16, ocean freight rate for shipping bulk grain from the U.S. Gulf to Japan was \$35 per metric ton (mt), down 10 percent from the beginning of the year and 38 percent from the same period a year ago. The rate from the Pacific Northwest to Japan was \$19.50 per mt, 7 percent less than the beginning of the year, and 30 percent less than the same period last year. Falling ocean freight rates could be partly due to slow market activity and excess vessel supply. For more on bulk market and ocean freight rates, see the [Feature Article](#).

#### Grain Inspections Down but Well Above 3-year Average

For the week ending January 15, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 2.6 million metric tons (mmt), down 4 percent from the past week and 5 percent from last year, but 36 percent above the 3-year average. Although wheat and corn inspections increased 35 and 47 percent from the past week, the increases could not offset the 21-percent drop in total soybean inspections. Mississippi Gulf grain inspections decreased 14 percent from the previous week as demand for soybeans dropped. Inspections in the Pacific Northwest, however, increased 35 percent as wheat and soybean shipments increased through that port region.

#### Panama Canal Expansion 85 Percent Complete

On January 19, the Panama Canal Authority (ACP) announced that the Canal expansion is 85 percent complete. The expansion project will create a new lane of traffic along the Canal through the construction of a new set of locks, doubling the waterway's capacity. The existing locks allow the passage of vessels that can carry up to 5,000 TEUs. After the expansion, the Post-Panamax vessels will be able to transit through the Canal, with up to 13,000 TEUs. Part of the completion of the final phase of the project involves the installation of 16 gates at the new lock chambers. Currently 3 of the 16 new lock gates have been installed. The expanded canal is expected to be operational by early 2016.

### Snapshots by Sector

#### Export Sales

During the week ending January 8, **unshipped balances** of wheat, corn, and soybeans totaled 33 mmt, 10 percent lower than at the same time last year. **Corn export sales** reached .819 mmt, significantly higher than last week, but 10 percent lower than the prior 4-week average. **Wheat** reached 0.285 mmt, up 89 percent, and **soybeans**, at 1.13 mmt, were up 24 percent from the previous week.

#### Rail

U.S. railroads originated 21,916 **carloads of grain** during the week ending January 10, down 5 percent from last week, up 8 percent from last year, and 11 percent above the 3-year average.

During the week ending January 15, average February shuttle **secondary railcar bids/offers per car** were \$450 below tariff, down \$250 from last week and \$2,188 lower than last year. There were no non-shuttle secondary railcar bids/offers.

#### Barge

During the week ending January 17, **barge grain movements** totaled 478,818 tons—18 percent lower than the previous week and 3 percent lower than the same period last year.

During the week ending January 17, 283 grain barges **moved down river**, down 19.4 percent from last week; 851 grain barges were **unloaded in New Orleans**, down 12.3 percent from the previous week.

#### Ocean

During the week ending January 15, 42 **ocean-going grain vessels** were loaded in the Gulf, 16 percent less than the same period last year. Sixty-five vessels are expected to be loaded within the next 10 days, 26 percent less than the same period last year.

During the week ending January 16, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$35 per mt, down 4 percent from the previous week. The cost of shipping from the PNW to Japan was \$19.50 per mt, down 3 percent from the previous week.

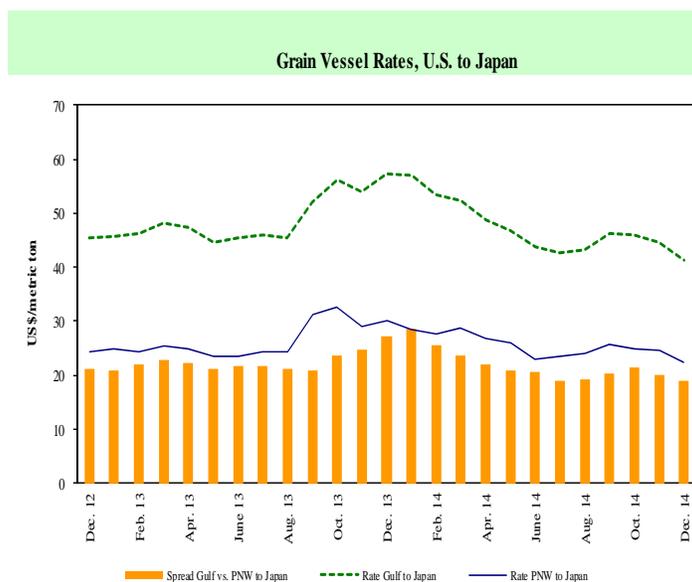
#### Fuel

During the week ending January 19, U.S. average **diesel fuel prices** decreased 12 cents from the previous week to \$2.93 per gallon. They were down 94 cents from the same week last year.

## 2014 in Review: Ocean Freight Rates Did Not Rise as Expected

Contrary to the expectation of some ship owners and market analysts, ocean freight rates for shipping bulk commodities, including grains, remained low during 2014. Ocean freight rates for shipping bulk grains from the U.S. Gulf to Japan averaged \$47.15 per metric ton (mt), 4 percent less than the previous year. The cost of shipping from the Pacific Northwest (PNW) to Japan averaged \$25.47 per mt, also 4 percent less than the previous year. With regard to rates, ship owners believed that 2014 was going to be a turnaround year in the bulk market, with increased demand for vessel capacity. Some market analysts had also predicted that demand for bulk vessels may eventually catch up with the supply. However, that expectation was not met as ship owners ordered more vessels in anticipation of a market turnaround. The increasing vessel supply, coupled with lackluster global economic growth, led to the continuation of excess vessel supply in the bulk market, which resulted in continued lower freight rates.

Calendar year 2014 began with declining ocean freight rates (see figure) due to slow market activity caused by seasonal holidays, including the New Year holiday around the world and the Chinese New Year celebrations. In addition, bad weather hindered iron ore loading operations in Australia and Brazil. Other factors impacting bulk vessel activities included the Indonesian government ban on exports of unprocessed minerals and the Chinese central bank's restriction on access to credit by steel mills and traders for purchasing raw materials (see [GTR, dated 5/1/14](#)). Despite improvement in market activity after the holidays and increased coal shipments out of Indonesia, the rates continued to fall through March as China cut back its soybean demand in response to bird flu problems, according to the *Drewry Dry Bulk Shipping Insight* report, April 2014



Data Source: O'Neil Commodity Consulting

Rates continued to fall in April as unfavorable weather conditions and geopolitical issues in Russia and

Ukraine slowed grain trade. Warmer temperatures reduced the demand for thermal coal in Europe and Asia. The price drop across the grain and oilseed markets and a reduction in iron ore demand further softened the rates during May and June. During this time, the dry bulk fleet continued to grow. By June, 1,989 new vessels (163 million deadweight tons (mdwt))—mostly Panamax—were on the order book (see [GTR, dated 7/24/14](#)).

The second half of the year began with mixed activity in the dry bulk market. Although ocean freight rates for shipping grain from the U.S. Gulf to Japan and Europe slightly declined in July, the rate from the PNW to Japan increased slightly. However, the rates for all shipping routes were relatively low (see [GTR, dated 10/30/14](#)). Despite support from the increased global grain and iron trade, a decline in coal demand from China and Europe weakened the dry bulk market overall. Activity revived during August due to an increased demand for iron ore and coal. Europe, China, and India replenished their diminishing coal stockpiles. There was a large influx of grain shipments from the Black Sea and Mediterranean into the global grain markets and increased grain loading activity in the U.S. Gulf. Mineral shipments from the U.S. Gulf also increased through September.

Trade between China and Western Australia improved in the middle of the month, but eventually weakened because of a decline in coal imports from China.

The fourth quarter began in October with the Gulf-to-Japan rate remaining relatively stable, and the PNW-to-Japan rate declining 4 percent from the previous month. The Panamax market remained strong due to increased grain exports from the European Union and South America because of good yields. A massive decrease in freight rates was prevented by increased demand for iron ore and a seasonal swell in grain at the onset of the harvest season. Rates declined in November (see table), as harvest seasons came to an end in the United States and Canada,

Ocean freight rates for grain routes during the fourth quarter 2014							
Route	Oct.	Nov.	Dec.	4th quarter 2014	Change from		
					3rd qtr '14	4th qtr '13	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	46.10	44.58	41.33	44.00	0.1	-19	-19
PNW to Japan	24.80	24.50	22.33	23.88	-2.3	-20	-20
Spread	21.30	20.08	19.00	20.13	3	-16	-16
U.S. Gulf to Europe	20.00	19.50	17.00	18.83	-3	-20	-20

Source: O'Neil Commodity Consulting

reducing exports. In addition, weather did not favor sugar production in Brazil. Rates fell further in December as the bulk market remained sluggish due to an ample supply of vessel capacity. The average fourth-quarter rates were below the previous year and the 4-year averages (see table). Overall, the average ocean freight rates were lower in 2014 than in 2013 due to excess vessel supply and lagging demand for bulk shipments. As of December 2013, the bulk vessel fleet stood at 9,813 vessels (714 mdwt), and the orderbook from 2013 to 2017 stood at 1,685 vessels (135.8 mdwt). As of December 2014, the bulk vessel fleet stood at 10,323 vessels (755.6 mdwt), and the orderbook from 2014 to 2018 stood at 1,980 vessels (166.96 mdwt). The number of bulk vessels increased by 5 percent over the year, and the bulk vessel capacity grew by 23 percent.

**Market Outlook:** It is too early to predict what 2015 will look like in terms of ocean freight rates. However, it is safe to say that ocean freight rates will remain modest for a while until the excess capacity disappears. Coal demand from India is likely to continue rising because of falling domestic supply caused by de-allocation of coal blocks. Furthermore, Japan planned to build 28 new coal-fired power plants following the closure of its nuclear power plants. These developments could strengthen the demand for coal, and hence put upward pressure on ocean freight rates. With regard to China, further stockpiling may be induced if lower iron ore demand persists, and consequently put upward pressure on ocean freight rates. However, the most important market driver is the wave of new vessel deliveries. At the same time, low steel prices and strong U.S. dollar have added to slow retirement of older vessels, exacerbating the problem of excess vessel supply. Will the vessel owners cut back on orders of new vessels in 2015? Or will the owners' optimism of 2014 continue to drive an increasing orderbook as it did in 2014?

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# Grain Transportation Indicators

Table 1

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

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
01/21/15	197	255	197	278	157	138
01/14/15	205	257	201	262	163	142

<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)

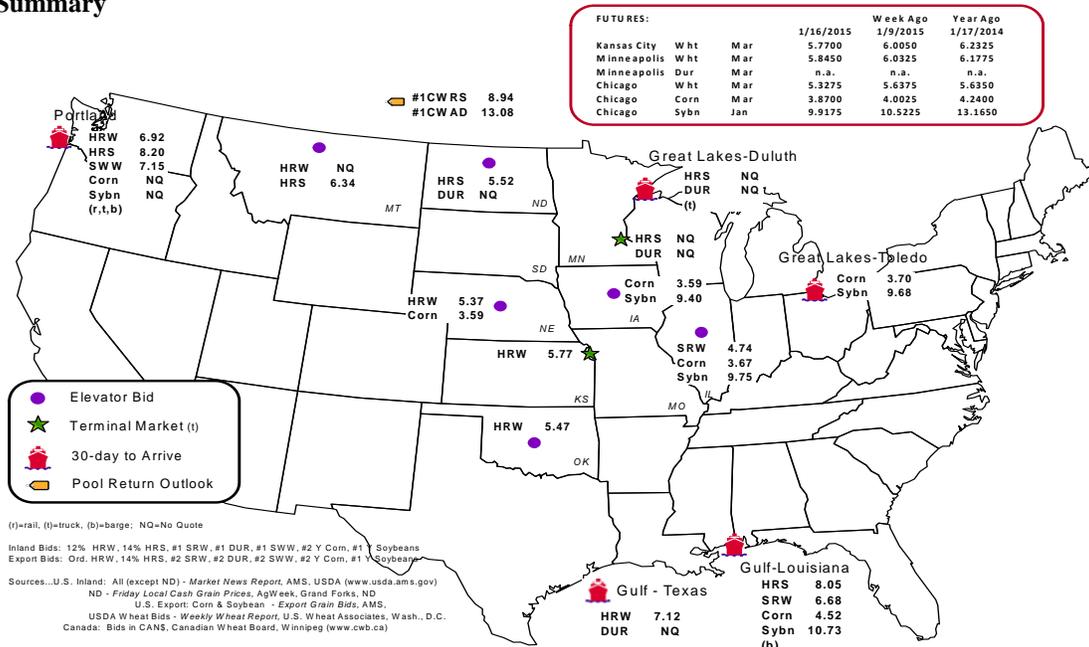
Commodity	Origin--Destination	1/16/2015	1/9/2015
Corn	IL--Gulf	-0.85	-0.75
Corn	NE--Gulf	-0.93	-0.82
Soybean	IA--Gulf	-1.33	-1.30
HRW	KS--Gulf	-1.35	-1.25
HRS	ND--Portland	-2.68	-2.77

Note: nq = no quote

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>

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico <sup>3</sup>
1/14/2015 <sup>p</sup>	1,035	1,344	4,227	1,097	7,703	1/10/2015	1,461
1/07/2015 <sup>r</sup>	1,095	1,228	4,770	1,201	8,294	1/3/2015	1,334
2015 YTD <sup>r</sup>	2,130	2,572	8,997	2,298	15,997	2015 YTD	2,795
2014 YTD <sup>r</sup>	2,161	3,003	10,111	1,104	16,379	2014 YTD	3,015
2015 YTD as % of 2014 YTD	99	86	89	208	98	% change YTD	93
Last 4 weeks as % of 2014 <sup>2</sup>	99	109	98	166	105	Last 4wks % 2014	83
Last 4 weeks as % of 4-year avg. <sup>2</sup>	143	125	115	169	125	Last 4wks % 4 yr	89
Total 2014	44,621	83,674	255,869	32,107	416,271	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

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

<sup>2</sup> Compared with same 4-weeks in 2013 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.

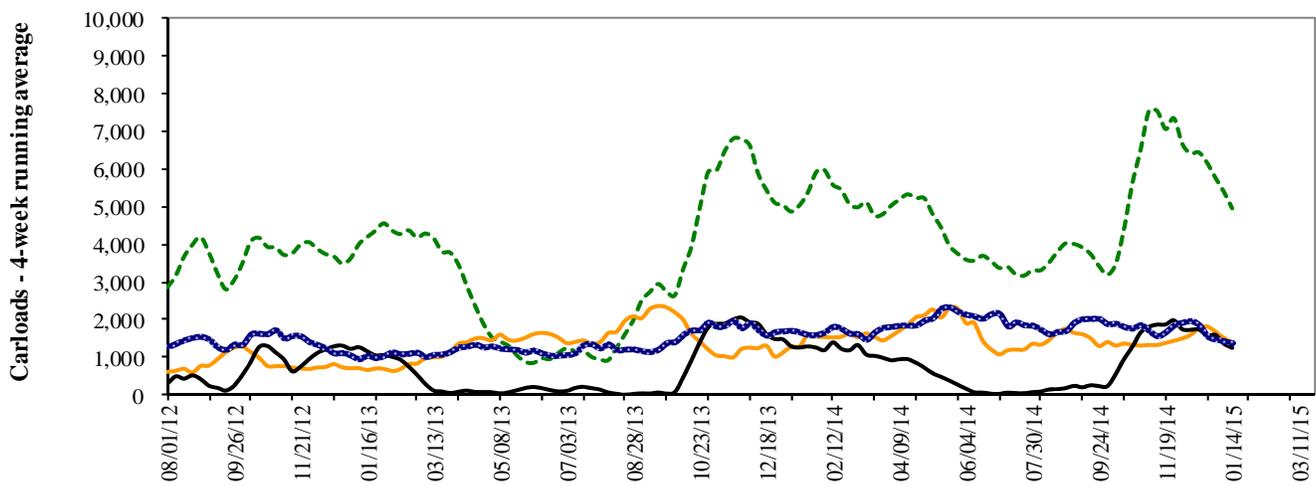
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail Deliveries to Port



--- Pacific Northwest: 4 wks. ending 1/14--down 2% from same period last year; up 15% from 4-year average  
--- Texas Gulf: 4 wks. ending 1/14--up 9% from same period last year; up 25% from 4-year average  
--- Miss. River: 4 wks. ending 1/14--down 1% from same period last year; up 43% from 4-year average  
--- Cross-border: 4 wks. ending 1/10-- down 17% from same period last year; down 11% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

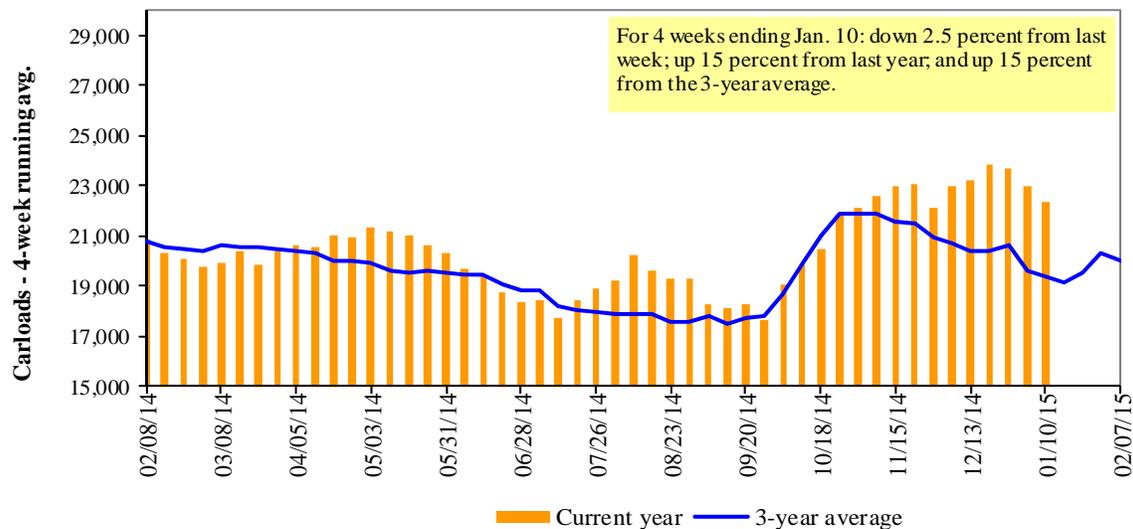
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
01/10/15	2,688	3,638	9,357	792	5,441	21,916	4,438	4,461
This week last year	1,699	2,961	8,596	1,126	5,985	20,367	3,797	4,722
2015 YTD	2,688	3,638	9,357	792	5,441	21,916	4,438	4,461
2014 YTD	1,699	2,961	8,596	1,126	5,985	20,367	3,797	4,722
2015 YTD as % of 2014 YTD	158	123	109	70	91	108	117	94
Last 4 weeks as % of 2014	113	104	127	91	106	114	117	106
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	125	113	109	143	122	115	116	94
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

<sup>1</sup>As a percent of the same period in 2009 and 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>**

Week ending	Delivery period								
	1/15/2015	Feb-15	Feb-14	Mar-15	Mar-14	Apr-15	Apr-14	May-15	May-14
BNSF <sup>3</sup>									
COT grain units		no offer	no offer	51	no offer	54	379	31	278
COT grain single-car <sup>5</sup>		no offer	no offer	3 .. 25	no offer	1 .. 33	75 .. 271	0 .. 33	89 .. 151
UP <sup>4</sup>									
GCAS/Region 1		no offer	no offer	no offer	90	no offer	no offer	n/a	n/a
GCAS/Region 2		no offer	no offer	no offer	1	no offer	no offer	n/a	n/a

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

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

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

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

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

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

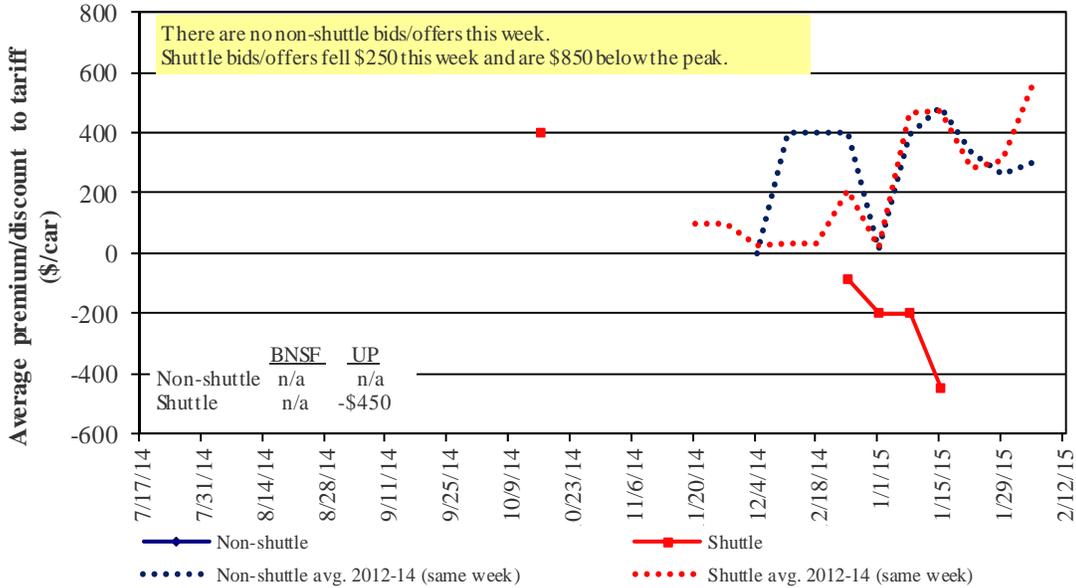
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

**Bids/Offers for Railcars to be Delivered in February 2015, Secondary Market**

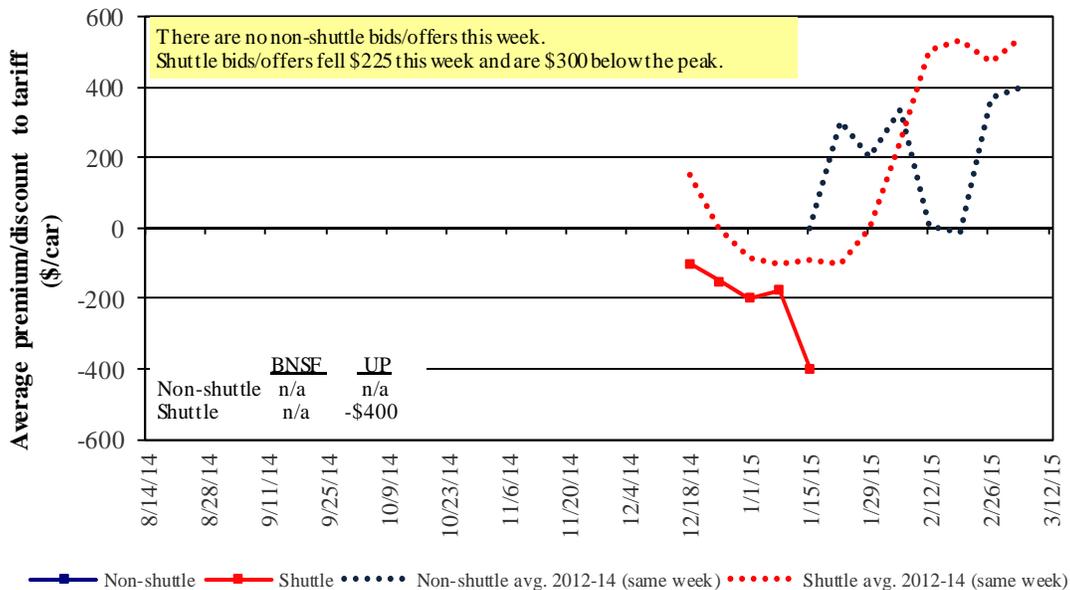


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in March 2015, Secondary Market**

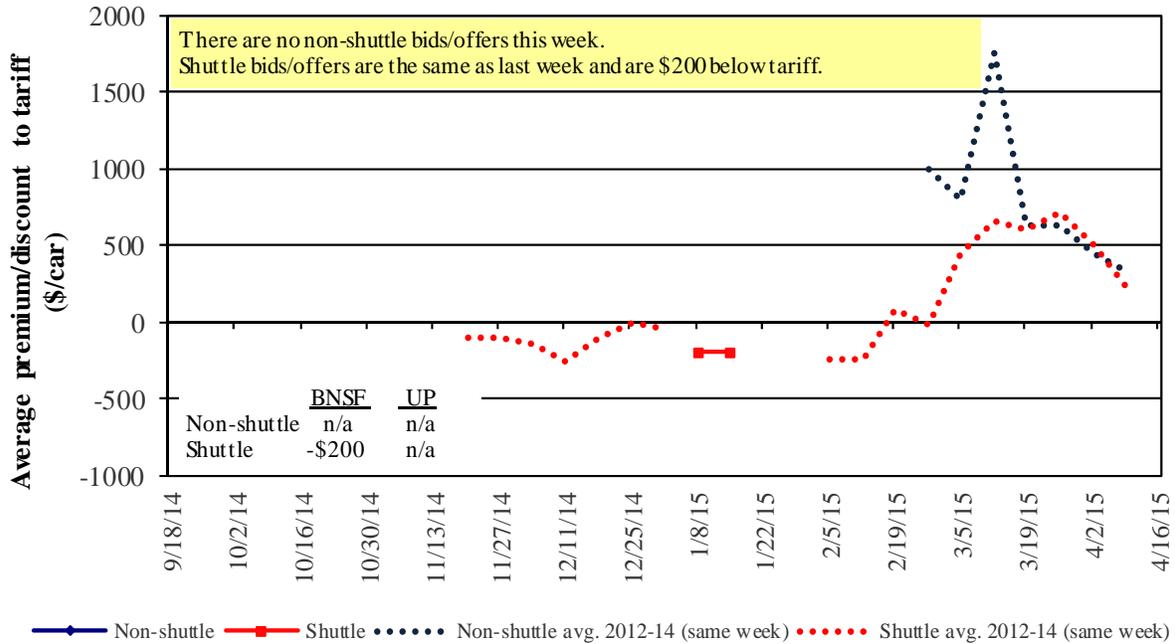


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in April 2015, 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>**

Week ending	Delivery period					
	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15
<b>Non-shuttle</b>						
BNSF-GF	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 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	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 2014	n/a	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	n/a	n/a	(200)	n/a	n/a	n/a
Change from last week	n/a	n/a	-	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(450)	(400)	n/a	n/a	n/a	n/a
Change from last week	(250)	(200)	n/a	n/a	n/a	n/a
Change from same week 2014	(1,225)	(650)	n/a	n/a	n/a	n/a

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

<sup>2</sup>Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

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>**

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>3</sup>
1/1/2015	metric ton					bushel <sup>2</sup>		
<b>Unit train</b>								
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$157	\$35.19	\$0.96	5	
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$86	\$36.57	\$1.00	0	
	Wichita, KS	Los Angeles, CA	\$6,244	\$444	\$66.41	\$1.81	-1	
	Wichita, KS	New Orleans, LA	\$4,026	\$276	\$42.72	\$1.16	4	
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$364	\$61.45	\$1.67	-1	
	Northwest KS	Galveston-Houston, TX	\$4,293	\$302	\$45.63	\$1.24	4	
	Amarillo, TX	Los Angeles, CA	\$4,492	\$421	\$48.79	\$1.33	3	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,328	\$312	\$36.15	\$0.92	3	
	Toledo, OH	Raleigh, NC	\$5,555	\$364	\$58.78	\$1.49	16	
	Des Moines, IA	Davenport, IA	\$2,168	\$66	\$22.19	\$0.56	4	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$273	\$49.99	\$1.27	15	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$175	\$42.49	\$1.08	17	
	Des Moines, IA	Little Rock, AR	\$3,308	\$194	\$34.78	\$0.88	2	
	Des Moines, IA	Los Angeles, CA	\$4,852	\$565	\$53.79	\$1.37	-7	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,864	\$335	\$41.70	\$1.13	5	
	Toledo, OH	Huntsville, AL	\$4,676	\$258	\$49.00	\$1.33	24	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$366	\$59.50	\$1.62	16	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$175	\$45.12	\$1.23	27	
	Champaign-Urbana, IL	New Orleans, LA	\$3,974	\$312	\$42.56	\$1.16	5	
<b>Shuttle Train</b>								
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$255	\$39.06	\$1.06	-1	
	Wichita, KS	Galveston-Houston, TX	\$3,471	\$199	\$36.44	\$0.99	-9	
	Chicago, IL	Albany, NY	\$4,723	\$341	\$50.29	\$1.37	17	
	Grand Forks, ND	Portland, OR	\$5,159	\$441	\$55.61	\$1.51	-1	
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$459	\$64.98	\$1.77	-1	
	Northwest KS	Portland, OR	\$5,260	\$496	\$57.16	\$1.56	3	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	\$537	\$54.98	\$1.40	-2
Sioux Falls, SD		Tacoma, WA	\$4,960	\$492	\$54.14	\$1.38	-2	
Champaign-Urbana, IL		New Orleans, LA	\$3,147	\$312	\$34.35	\$0.87	3	
Lincoln, NE		Galveston-Houston, TX	\$3,510	\$287	\$37.70	\$0.96	-1	
Des Moines, IA		Amarillo, TX	\$3,690	\$244	\$39.07	\$0.99	2	
Minneapolis, MN		Tacoma, WA	\$5,000	\$532	\$54.94	\$1.40	-2	
Council Bluffs, IA		Stockton, CA	\$4,400	\$551	\$49.16	\$1.25	-2	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,520	\$492	\$59.70	\$1.62	-1	
	Minneapolis, MN	Portland, OR	\$5,530	\$537	\$60.25	\$1.64	-2	
	Fargo, ND	Tacoma, WA	\$5,430	\$437	\$58.26	\$1.59	-1	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$360	\$47.51	\$1.29	4	
	Toledo, OH	Huntsville, AL	\$3,851	\$258	\$40.81	\$1.11	31	
	Grand Island, NE	Portland, OR	\$5,360	\$507	\$58.27	\$1.59	3	

<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**

Effective date: 1/1/2015

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel	Tariff plus surcharge per:		Percent change Y/Y <sup>4</sup>
				surcharge per car <sup>2</sup>	metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$6,960	\$466	\$75.88	\$2.06	8
	OK	Cuautitlan, EM	\$6,565	\$566	\$72.86	\$1.98	5
	KS	Guadalajara, JA	\$7,010	\$547	\$77.22	\$2.10	5
	TX	Salinas Victoria, NL	\$3,885	\$213	\$41.88	\$1.14	30
Corn	IA	Guadalajara, JA	\$8,349	\$644	\$91.88	\$2.33	3
	SD	Celaya, GJ	\$7,656	\$610	\$84.46	\$2.14	-1
	NE	Queretaro, QA	\$7,535	\$572	\$82.83	\$2.10	1
	SD	Salinas Victoria, NL	\$5,880	\$464	\$64.82	\$1.64	-1
	MO	Tlalnepantla, EM	\$6,887	\$555	\$76.04	\$1.93	0
	SD	Torreon, CU	\$6,722	\$511	\$73.90	\$1.88	-1
Soybeans	MO	Bojay (Tula), HG	\$8,111	\$543	\$88.42	\$2.40	2
	NE	Guadalajara, JA	\$8,722	\$621	\$95.46	\$2.60	2
	IA	El Castillo, JA	\$8,855	\$606	\$96.67	\$2.63	-1
	KS	Torreon, CU	\$7,089	\$385	\$76.36	\$2.08	2
Sorghum	TX	Guadalajara, JA	\$6,953	\$397	\$75.10	\$1.91	-1
	NE	Celaya, GJ	\$7,287	\$554	\$80.11	\$2.03	0
	KS	Queretaro, QA	\$6,795	\$348	\$72.98	\$1.85	1
	NE	Salinas Victoria, NL	\$5,500	\$407	\$60.36	\$1.53	1
	NE	Torreon, CU	\$6,418	\$455	\$70.22	\$1.78	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

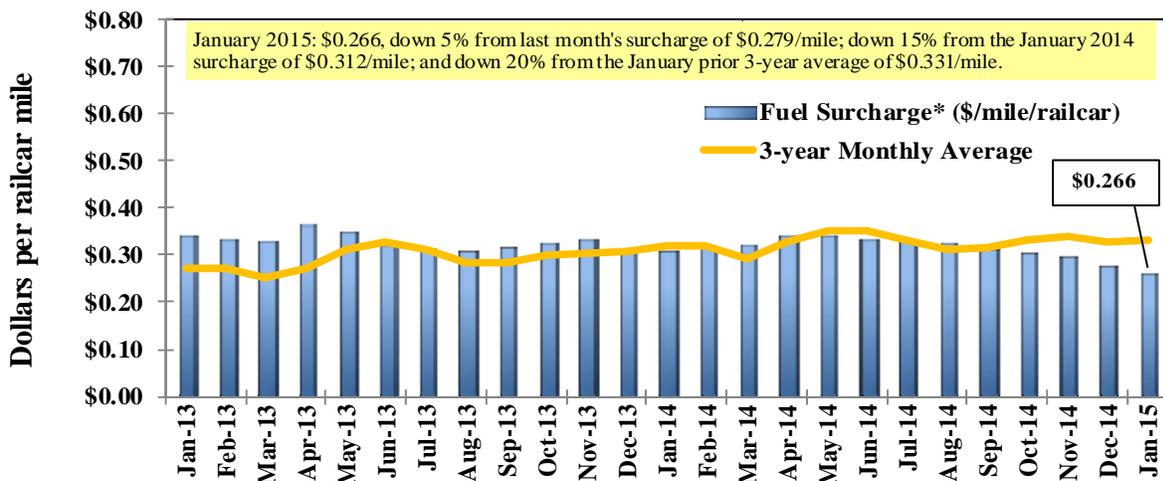
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<sup>4</sup>Percentage change year over year 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.

\* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	1/20/2015	-	-	500	386	388	397	288
	1/13/2015	-	-	472	335	378	378	257
<b>\$/ton</b>	1/20/2015	-	-	23.20	15.40	18.20	16.04	9.04
	1/13/2015	-	-	21.90	13.37	17.73	15.27	8.07
<b>Current week % change from the same week:</b>								
	Last year	-	-	-10	-13	-12	-11	-6
	3-year avg. <sup>2</sup>	-	-	14	11	12	15	19
<b>Rate<sup>1</sup></b>	February	-	-	443	325	363	363	225
	April	408	375	333	288	313	313	200

<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:

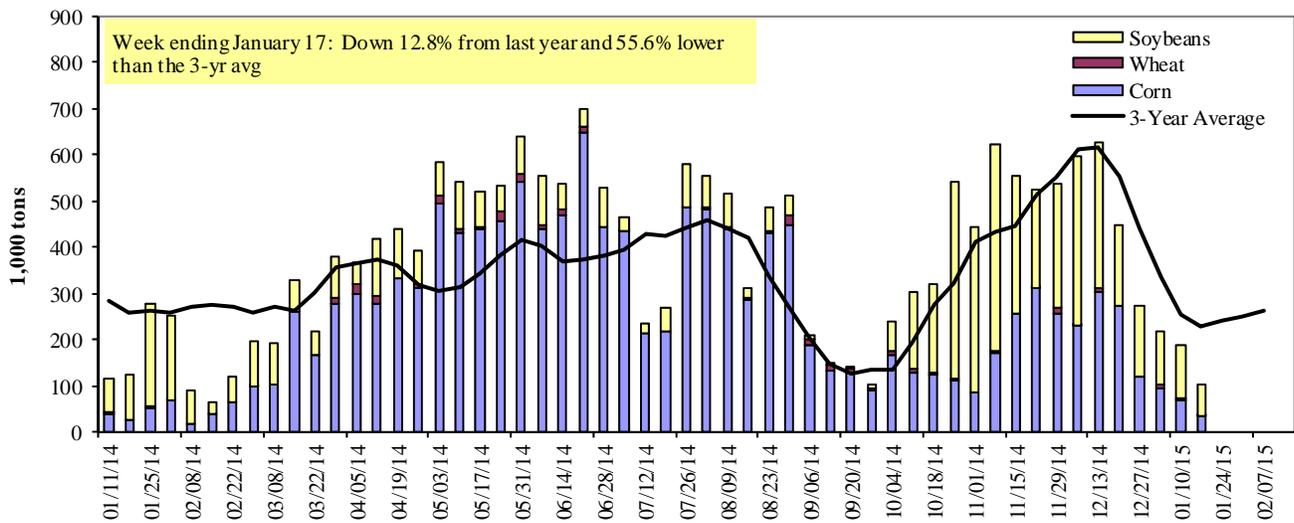
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton})/100$$

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)**

Week ending 01/17/2015	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	34	3	54	0	90
Granite City, IL (L27)	34	3	65	3	105
<b>Illinois River (L8)</b>	17	3	35	0	55
<b>Ohio River (L52)</b>	163	8	168	9	348
<b>Arkansas River (L1)</b>	0	4	22	0	27
Weekly total - 2015	196	15	255	12	479
Weekly total - 2014	174	17	289	14	494
2015 YTD <sup>1</sup>	458	33	553	15	1,059
2014 YTD	329	51	550	22	952
2015 as % of 2014 YTD	140	65	100	70	111
Last 4 weeks as % of 2014 <sup>2</sup>	116	66	100	66	104
Total 2014	20,693	2,181	11,813	258	34,946

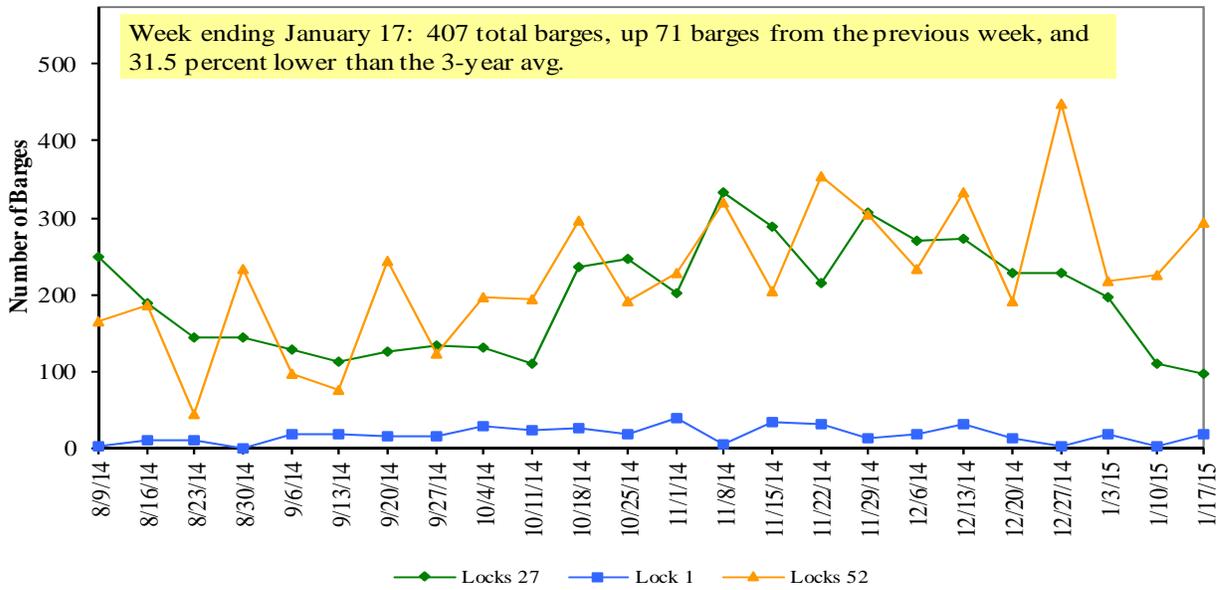
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

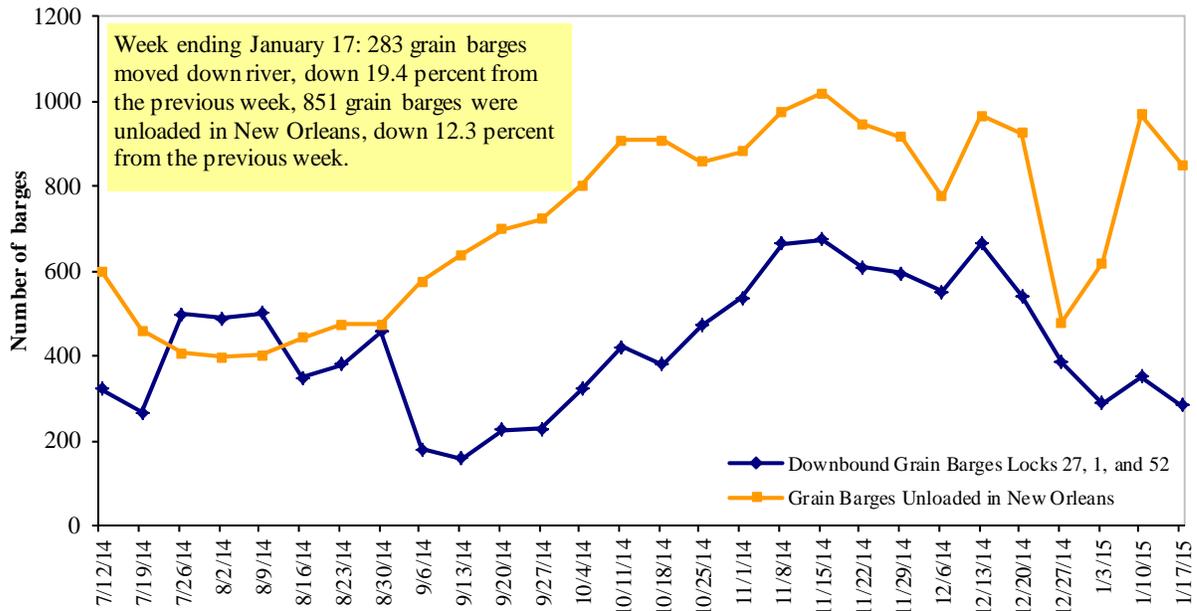
Source: U.S. Army Corps of Engineers

**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 01/19/2014 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.018	-0.116	-0.928
	New England	3.072	-0.123	-1.046
	Central Atlantic	3.131	-0.108	-0.929
	Lower Atlantic	2.918	-0.121	-0.911
II	Midwest <sup>2</sup>	2.889	-0.121	-0.941
III	Gulf Coast <sup>3</sup>	2.843	-0.121	-0.928
IV	Rocky Mountain	2.884	-0.143	-0.976
V	West Coast	3.011	-0.115	-0.955
	West Coast less California	2.826	-0.152	-1.035
	California	3.165	-0.085	-0.891
Total	U.S.	2.933	-0.120	-0.940

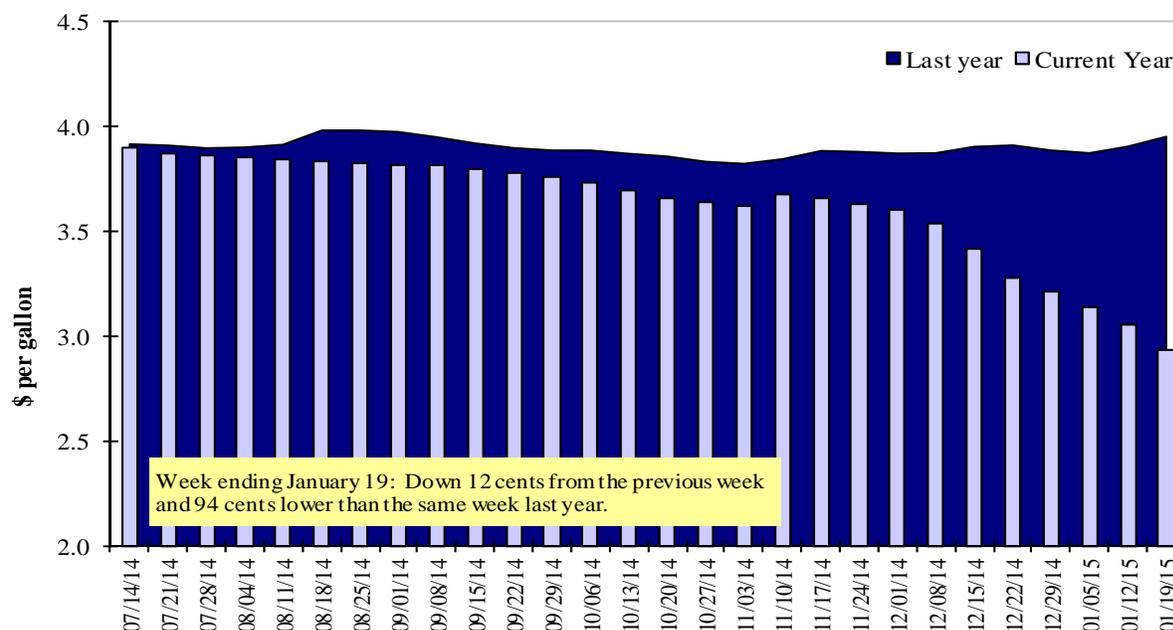
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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)

Week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
<b>Export Balances<sup>1</sup></b>									
1/8/2015	1,381	810	1,716	942	87	4,937	15,146	12,931	33,014
This week year ago	1,500	1,003	1,430	809	140	4,882	16,890	14,858	36,630
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2014/15 YTD	4,388	2,352	4,463	2,319	476	13,998	13,015	31,393	58,406
2013/14 YTD	7,779	5,751	3,644	2,551	283	20,006	12,090	26,587	58,683
YTD 2014/15 as % of 2013/14	56	41	122	91	168	70	108	118	100
Last 4 wks as % of same period 2013/14	94	85	120	113	62	102	88	94	92
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

<sup>1</sup> Current unshipped export sales to date

<sup>2</sup> Shipped export sales to date; new marketing year 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)

Table 13

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

Week ending 01/08/2015	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2011-2013
	2014/15 Current MY	2013/14 Last MY		
- 1,000 mt -				
Japan	5,728	5,370	7	10,079
Mexico	6,890	8,014	(14)	8,145
Korea	1,118	1,271	(12)	2,965
Colombia	2,150	1,114	93	3,461
Taiwan	493	629	(22)	1,238
<b>Top 5 Importers</b>	<b>16,379</b>	<b>16,399</b>	<b>(0.1)</b>	<b>25,887</b>
<b>Total US corn export sales</b>	<b>28,161</b>	<b>28,980</b>	<b>(3)</b>	<b>34,445</b>
% of Projected	63%	60%		
Change from prior week	819	821		
<b>Top 5 importers' share of U.S. corn export sales</b>	<b>58%</b>	<b>57%</b>		<b>75%</b>
<b>USDA forecast, January 2015</b>	<b>44,450</b>	<b>48,700</b>	<b>(9)</b>	
<b>Corn Use for Ethanol USDA forecast, January 2015</b>	<b>131,445</b>	<b>130,404</b>	<b>1</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - 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/

<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**

Week Ending 01/08/2015	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2011-13
	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	27,842	26,786	4	24,211
Mexico	2,232	1,909	17	2,971
Indonesia	1,066	1,199	(11)	1,895
Japan	1,201	1,128	6	1,750
Taiwan	1,048	915	14	1,055
<b>Top 5 importers</b>	<b>33,388</b>	<b>31,938</b>	<b>5</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>44,323</b>	<b>41,445</b>	<b>7</b>	<b>39,169</b>
% of Projected	92%	92%		
Change from prior week*	1,133	694		
<b>Top 5 importers' share of U.S. soybean export sales</b>	75%	77%		<b>81%</b>
<b>USDA forecast, January 2015</b>	<b>48,170</b>	<b>44,820</b>	<b>7</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [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/><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). (Carryover plus Accumulated Exports)

Table 15

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

Week Ending 01/08/2015	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2011-2013
	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,555	1,896	35	3,243
Mexico	2,178	2,369	(8)	3,066
Nigeria	1,758	2,141	(18)	2,960
Philippines	1,836	1,420	29	2,006
China	270	4,195	(94)	1,830
Brazil	1,488	3,480	(57)	1,617
Korea	1,134	996	14	1,552
Taiwan	794	736	8	969
Indonesia	399	733	(46)	813
Colombia	509	582	(13)	610
<b>Top 10 importers</b>	<b>12,920</b>	<b>18,547</b>	<b>(30)</b>	<b>18,665</b>
<b>Total US wheat export sales</b>	<b>18,935</b>	<b>24,887</b>	<b>(24)</b>	<b>27,696</b>
% of Projected	75%	78%		
Change from prior week*	285	320		
<b>Top 10 importers' share of U.S. wheat export sales</b>	68%	75%		67%
<b>USDA forecast, January 2015</b>	<b>25,170</b>	<b>32,010</b>	<b>(21)</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports - [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/><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	Week ending 01/15/15	Previous Week <sup>1</sup>	Current Week as % of Previous	2015 YTD <sup>1</sup>	2014 YTD <sup>1</sup>	2015 YTD as % of 2014 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2014
							2014	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	204	175	117	574	516	111	110	115	12,241
Corn	51	109	47	258	112	230	35	36	7,682
Soybeans	515	285	180	1,218	916	133	268	260	12,469
<b>Total</b>	<b>770</b>	<b>569</b>	<b>135</b>	<b>2,050</b>	<b>1,544</b>	<b>133</b>	<b>146</b>	<b>148</b>	<b>32,392</b>
<b>Mississippi Gulf</b>									
Wheat	84	11	754	193	292	66	92	79	4,397
Corn	588	302	195	1,236	1,041	119	144	150	30,566
Soybeans	785	1,378	57	2,878	2,118	136	118	143	28,371
<b>Total</b>	<b>1,457</b>	<b>1,690</b>	<b>86</b>	<b>4,308</b>	<b>3,451</b>	<b>125</b>	<b>124</b>	<b>142</b>	<b>63,334</b>
<b>Texas Gulf</b>									
Wheat	10	40	25	92	279	33	80	74	6,078
Corn	0	0	n/a	0	60	0	107	98	580
Soybeans	60	88	68	211	186	114	176	274	886
<b>Total</b>	<b>70</b>	<b>128</b>	<b>54</b>	<b>303</b>	<b>525</b>	<b>58</b>	<b>105</b>	<b>107</b>	<b>7,544</b>
<b>Interior</b>									
Wheat	29	16	180	61	45	134	124	155	1,385
Corn	82	80	103	249	192	130	72	102	5,590
Soybeans	72	100	72	273	207	132	76	164	4,312
<b>Total</b>	<b>183</b>	<b>195</b>	<b>94</b>	<b>582</b>	<b>444</b>	<b>131</b>	<b>154</b>	<b>130</b>	<b>11,287</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	0	0	n/a	138	227	935
Corn	0	0	n/a	0	0	n/a	n/a	196	288
Soybeans	0	0	n/a	0	0	n/a	272	254	988
<b>Total</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>214</b>	<b>244</b>	<b>2,211</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	0	0	n/a	n/a	565	553
Corn	0	0	n/a	0	0	n/a	9	10	816
Soybeans	88	83	106	217	126	172	128	149	2,073
<b>Total</b>	<b>88</b>	<b>83</b>	<b>105</b>	<b>218</b>	<b>127</b>	<b>172</b>	<b>124</b>	<b>143</b>	<b>3,441</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	327	242	135	920	1,132	81	72	81	25,588
Corn	722	490	147	1,743	1,406	124	76	90	45,523
Soybeans	1,519	1,934	79	4,797	3,554	135	136	171	49,099
<b>Total</b>	<b>2,567</b>	<b>2,666</b>	<b>96</b>	<b>7,460</b>	<b>6,092</b>	<b>122</b>	<b>107</b>	<b>130</b>	<b>120,210</b>

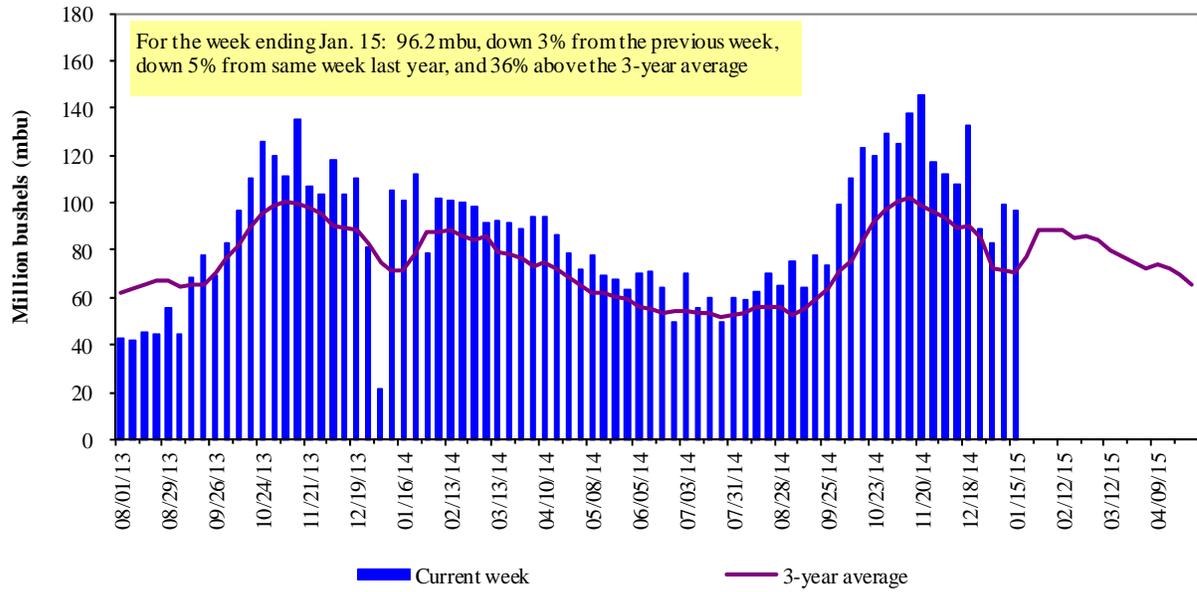
<sup>1</sup> Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2013.

Figure 14

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

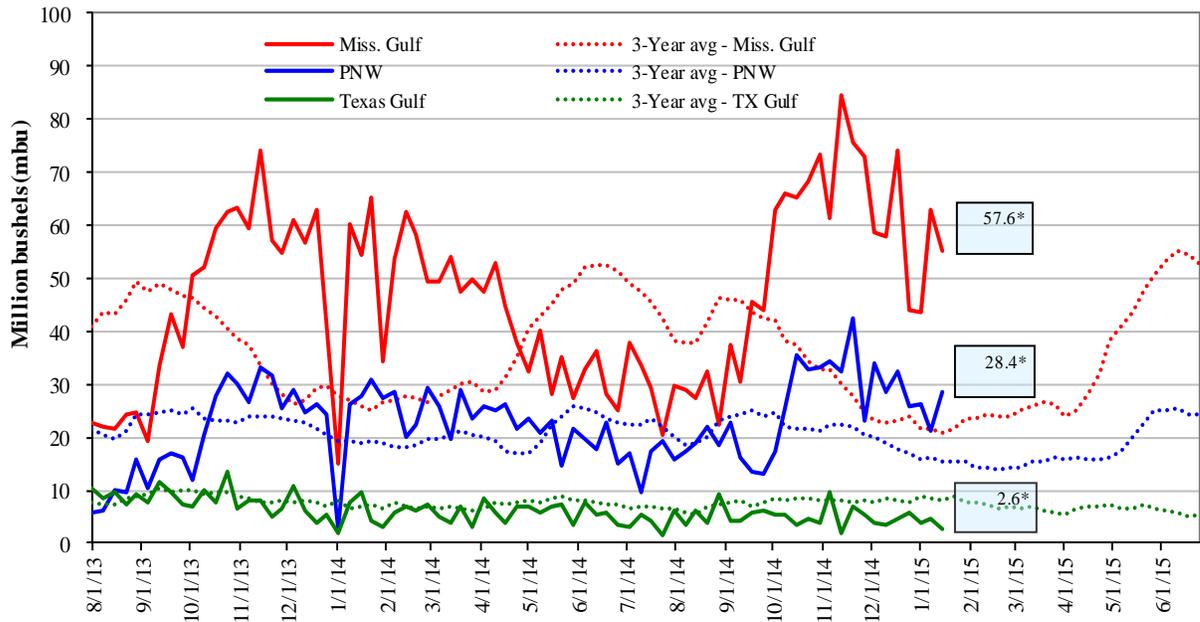


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)**



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); \*mbu, this week.

<b>Jan 15: % change from:</b>	<b>MS Gulf</b>	<b>TX Gulf</b>	<b>U.S. Gulf</b>	<b>PNW</b>
Last week	down 12	down 46	down 15	up 34
Last year (same week)	up 1	down 74	down 11	up 2
3-yr avg. (4-wk mov. avg.)	up 41	down 37	up 33	up 6

# Ocean Transportation

Table 17

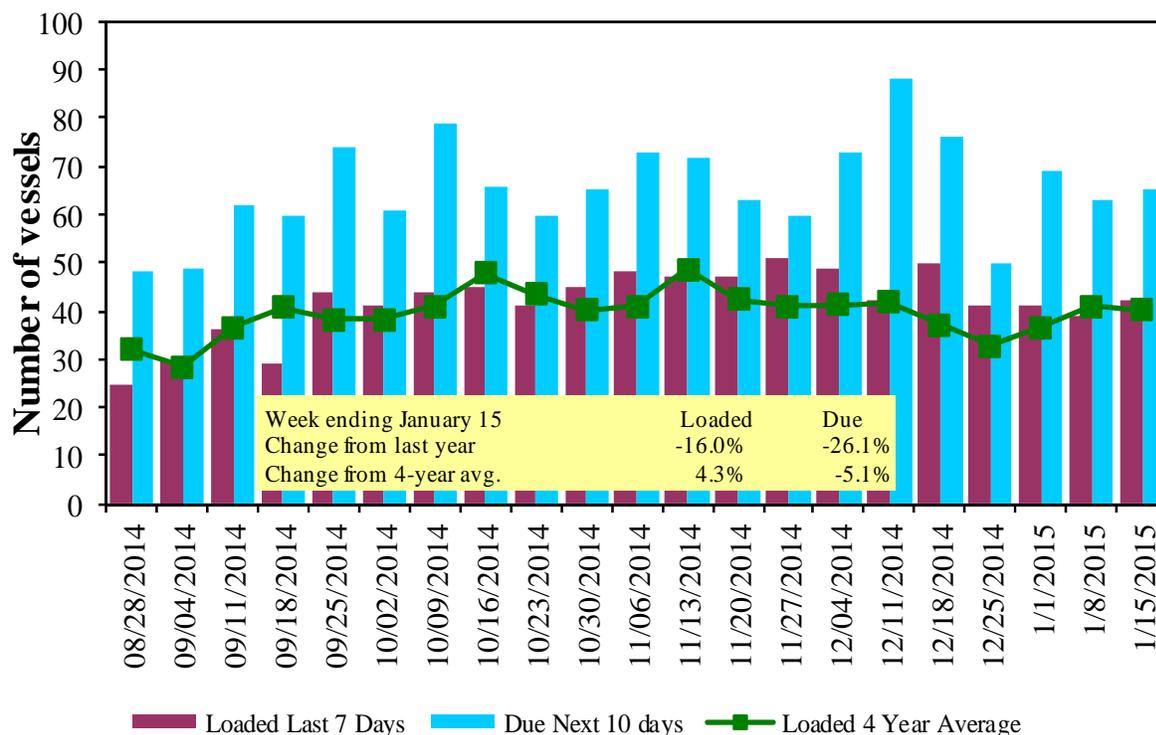
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
1/15/2015	37	42	65	13	n/a
1/8/2015	41	39	63	15	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	46	39	59	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

**U.S. Gulf<sup>1</sup> Vessel Loading Activity**

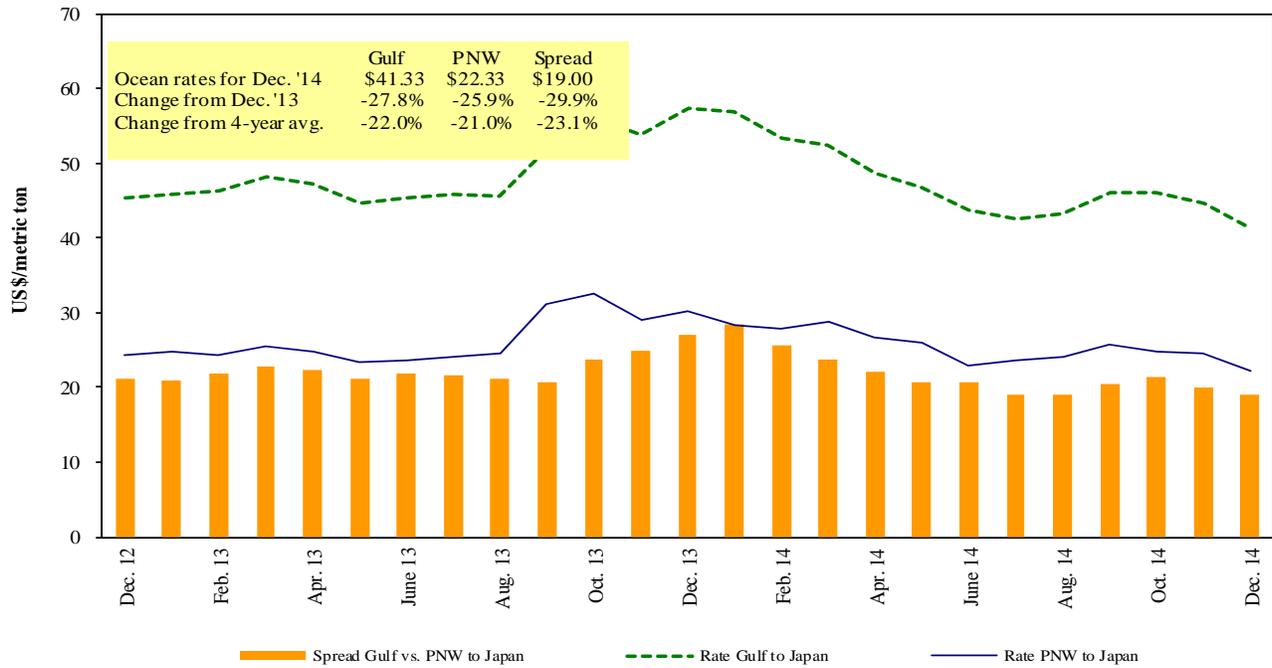


Source: Transportation & Marketing Programs/AMS/USDA

<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 1/17/2015**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 19/28	55,000	34.00
U.S. Gulf	China	Heavy Grain	Dec 15/30	55,000	40.25
U.S. Gulf	China	Heavy Grain	Dec 15/20	55,000	50.00
U.S. Gulf	China	Heavy Grain	Dec 10/17	55,000	41.75
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	60,000	44.75
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	44.25
U.S. Gulf	China	Heavy Grain	Nov 5/15	60,000	45.25
U.S. Gulf	China	Heavy Grain	Nov 1/8	58,000	46.00
U.S. Gulf	Brazil	Wheat	Nov 8/14	25,000	22.00
U.S. Gulf	Djibouti <sup>1</sup>	Wheat/Sorghum	Nov 20/30	22,000	68.50
U.S. Gulf	Kenya <sup>1</sup>	Sorghum	Jan 2/12	10,000	91.35
PNW	China	Heavy Grain	Nov 1/30	60,000	26.50
PNW	China	Grain	Oct 20/30	60,000	23.00
Brazil	China	Heavy Grain	Feb 10/17	60,000	23.75

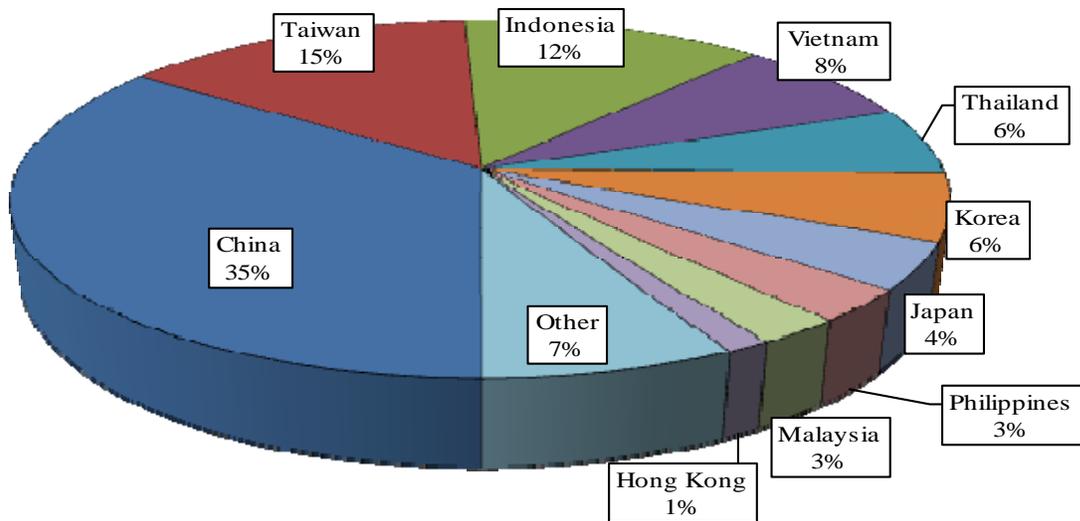
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

<sup>1</sup>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)

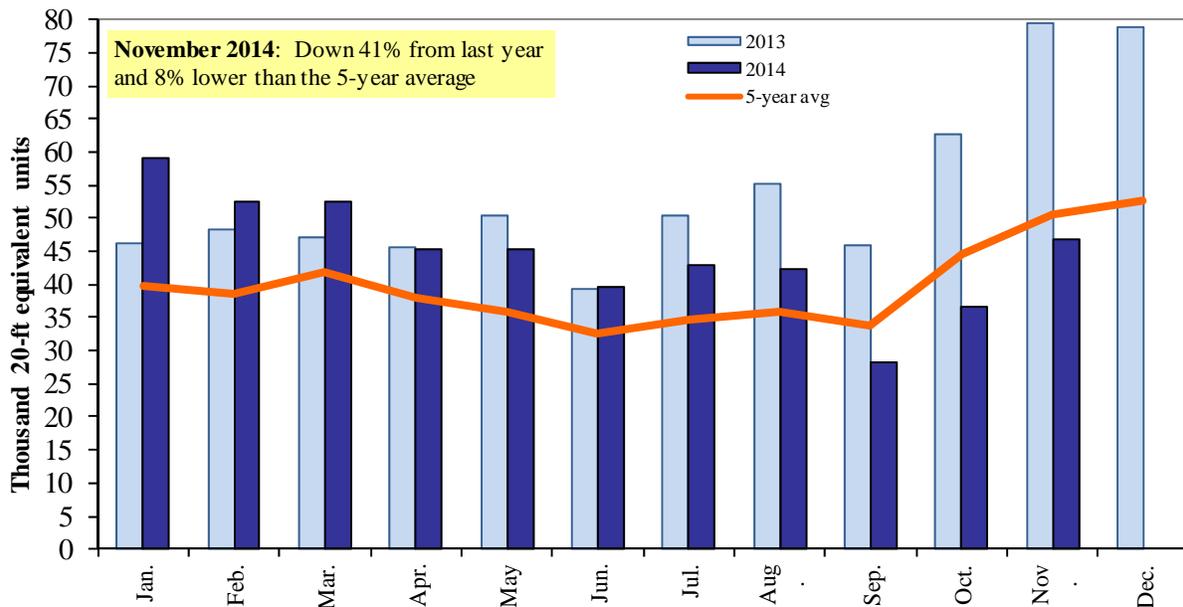
In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, January-November, 2014**



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