



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service  
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## WEEKLY HIGHLIGHTS

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#### Wheat Inspections Continue to Increase

For the week ending April 9, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 1.78 million metric tons (mmt), down 11 percent from the past week, down 27 percent below last year, and 9 percent below the 3-year average. Grain inspections decreased 9 percent in the Pacific Northwest and 19 percent in the Mississippi Gulf. Wheat inspections (.469 mmt) were 18 percent higher than the previous week, increasing for the second consecutive week. Wheat inspections increased by 66 percent from the past week—primarily through the Texas Gulf—as shipments increased to Egypt and Venezuela.

#### High Water Conditions Raising Rates

As of mid-April, high water conditions have affected navigation conditions, reducing tow sizes and delaying transit times on portions of the Mississippi and Ohio Rivers. As of April 14, grain barge rates increased 2 to 8 percent from the previous week on the Mississippi and Illinois Rivers, while rates on the Ohio River have been steady for the last 3 weeks. Current rates are 28 to 46 percent above the 3-year average for principle originating river shipping points for export grain. Year-to-date grain shipments on the locking portions of the river system are 8.0 million tons, 8 percent lower than last year at this same time.

#### New Rail Bridge between Brownsville and Matamoros

The first new railroad bridge to be constructed in over 110 years between the United States and Mexico is projected to open in the second half of 2015. The West Rail International Bridge will link Brownsville, TX, and Matamoros, Mexico, and is designed to alleviate urban congestion by rerouting traffic around the most populated areas of both cities. The bridge was developed in partnership between the U.S. and Mexican governments. About 4 percent of U.S. grain and oilseed exports to Mexico cross the existing Brownsville and Matamoros rail bridge, but the new bridge should expand regional transportation capacity.

#### U.S. Soybean Sales are Reduced by Cancellations or Switches to the 2015/16 Marketing Year

During the week ending April 2, **unshipped balances** of wheat, corn, and soybeans totaled 22.5 mmt, 14 percent lower than at the same time last year. **Corn export sales** reached 0.640 mmt, up 57 percent, and **wheat export sales** reached 0.320 mmt, up 97 percent from the previous week. **Soybean export sales** experienced a net reduction of 0.177 mmt from the previous week, as sales were offset by some countries—including China, Japan, and Mexico—canceling previous orders or switching to the 2015/16 marketing year. These changes in export sales, compared to the preceding weeks, indicate a possible increase in short-term demand for transportation of corn and wheat, but lower demand for moving soybeans.

### Snapshots by Sector

#### **Rail**

U.S. railroads originated 20,868 **carloads of grain** during the week ending April 4, down 8 percent from last week, up 6 percent from last year, and 11 percent higher than the 3-year average.

During the week ending April 9, average April shuttle **secondary railcar bids/offers per car** were \$200 below tariff, down \$150 from last week and \$1,475 lower than last year. Non-shuttle secondary railcar bids/offers were \$100 below tariff, down \$13 from last week and \$1,100 lower than last year.

#### **Barge**

During the week ending April 11, **barge grain movements** totaled 706,194 tons—about 2 percent above the previous week and 1 percent higher than the same period last year.

During the week ending April 11, 448 grain barges **moved down river**, up 1 percent from last week; 551 grain barges were **unloaded in New Orleans**, up 14 percent from the previous week.

#### **Ocean**

During the week ending April 9, 34 **ocean-going grain vessels** were loaded in the Gulf, 32 percent less than the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days, 10 percent more than the same period last year.

During the week ending April 10, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$31 unchanged from the previous week. The cost of shipping from the PNW to Japan was \$17 per mt, unchanged from the previous week.

#### **Fuel**

During the week April 13, U.S. **diesel fuel prices** averaged \$2.75 per gallon, 3 cents lower than the previous week. They were down \$1.20 from the same week last year.

# Feature Article/Calendar

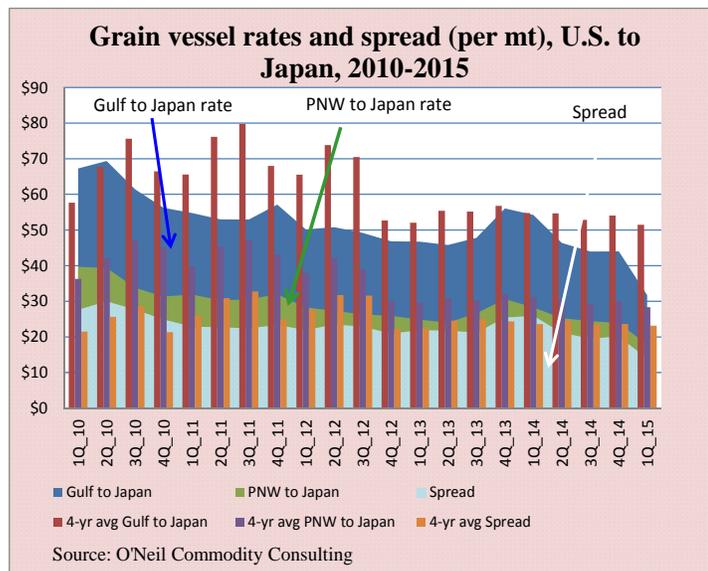
## First Quarter Bulk Ocean Freight Rates Fell Amid Chinese Holiday and Decreased Demand

Ocean freight rates for shipping bulk grains on multiple routes declined from the previous quarter and were lower than a year earlier. The rates for shipping one metric ton (mt) of grain during the quarter averaged \$31.71 from the U.S. Gulf to Japan, \$17.83 per mt from the Pacific Northwest (PNW) to Japan, and \$14.03 per mt from the U.S. Gulf to Europe, all significantly less than the previous quarter, last year, and the 4-year average (see table and graph below). The spread, or difference, between the U.S. Gulf-to-Japan and PNW-to-Japan rates was \$13.88 per mt, lower than the previous quarter, last year, and the 4-year average.

Ocean freight rates for grain routes during the first quarter 2015							
Route	Jan.	Feb.	Mar.	1st quarter 2015	Change from		
					1st qtr '14	4th qtr '14	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	34.50	28.63	32.00	31.71	-41.5	-28	-38
PNW to Japan	19.00	16.50	18.00	17.83	-37.0	-25	-37
Spread	15.50	12.13	14.00	13.88	-46	-31	-40
U.S. Gulf to Europe	14.60	13.50	14.00	14.03	-40	-25	-35

Source: O'Neil Commodity Consulting

Rates continued to drop in January, keeping the trend that started in the previous quarter. There was decreased demand for bulk shipping as global demand for dry bulk commodities fell. Despite an increase in coal imports from India, the overall coal trade declined as the Chinese government reduced imports because of its shift to renewable sources of energy. The Chinese government plans to build 26 new nuclear power plants in order to reduce dependency on coal for electricity production. Rates continued to fall in February due to an excess supply of vessels in the market. In addition, market activity slowed due to the Chinese Lunar New Year holiday that lasted from February 19 through March 5. Some charterers re-negotiated long term trip rates with vessel owners, pushing rates down further. However, rates increased slightly during March due to increasing activity in the coal and grain trades, with an especially large increase in demand for thermal coal and petcoke by India. The increase in demand for thermal coal and petcoke continued to provide employment to Panamax and Supramax vessels.



**Market Outlook:** Urbanization, infrastructure development, and low prices of iron ore are expected to fuel demand for iron ore in China while the quality of imported coal is expected to drive a growing

demand for coal in India. However, an oversupply of cheap Chinese steel in the world market is prompting the government to reduce steel production until 2017. The decision to decrease steel production, coupled with falling demand from developing economies, could have negative effects on the iron ore market. Also, stringent environmental regulations have slowed the demand for coal in major economies such as China and the United Kingdom.

According to the April *Drewry Shipping Insight* report, world grain production is likely to fall by 3 percent from the previous month to 1,937 million tons. India and Bangladesh may import more wheat and rice to cover lower crop production. Russia is also planning to lift its ban on wheat exports in July. However, the appreciation of the U.S. dollar could hinder U.S. wheat exports to China and South Africa. Finally, ship-owners are trying to mitigate their debt profiles by converting some of their dry bulk vessels into tankers and selling off new orders. With a decline in new building activity and a rise in demolition, vessel supply is expected to slow down. Ocean freight rates for shipping bulk commodities including grain are expected to remain relatively low as long as there is excess vessel capacity in the market. As we enter the second quarter, ocean rates remain low and significantly lower than last year. As of April 10, the ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan was \$31 per mt—38 percent less than the same period last year. The rate from the PNW to Japan was \$17 per mt—37 percent less than the same period last year. [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov)

# Grain Transportation Indicators

Table 1

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

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/15/15	185	240	197	259	139	121
04/08/15	187	241	203	244	139	121

<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)

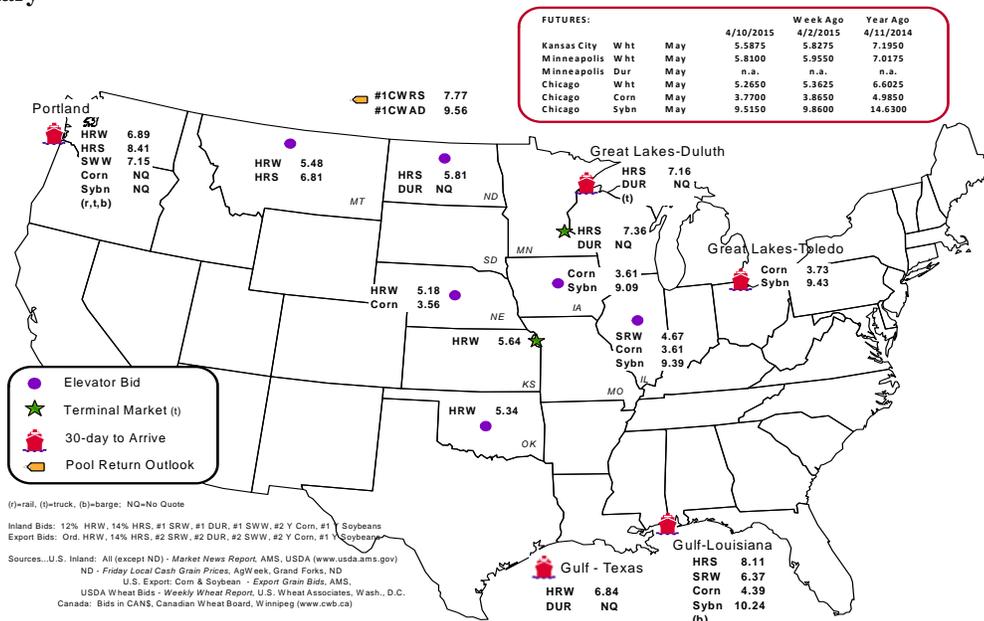
Commodity	Origin--Destination	4/10/2015	4/2/2015
Corn	IL--Gulf	-0.78	-0.73
Corn	NE--Gulf	-0.83	-0.77
Soybean	IA--Gulf	-1.15	-1.18
HRW	KS--Gulf	-1.20	-1.25
HRS	ND--Portland	-2.60	-2.72

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 Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf				
4/08/2015 <sup>p</sup>	429	2,230	5,763	495	8,917	4/4/2015	1,572	
4/01/2015 <sup>r</sup>	304	1,716	6,538	376	8,934	3/28/2015	1,636	
2015 YTD <sup>r</sup>	9,466	18,645	80,359	10,133	118,603	2015 YTD	22,375	
2014 YTD <sup>r</sup>	16,176	21,797	72,717	11,870	122,560	2014 YTD	24,062	
2015 YTD as % of 2014 YTD	59	86	111	85	97	% change YTD	93	
Last 4 weeks as % of 2014 <sup>2</sup>	46	108	129	63	109	Last 4wks % 2014	91	
Last 4 weeks as % of 4-year avg. <sup>2</sup>	69	107	154	96	132	Last 4wks % 4 yr	88	
Total 2014	44,621	83,674	256,670	32,107	417,072	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.

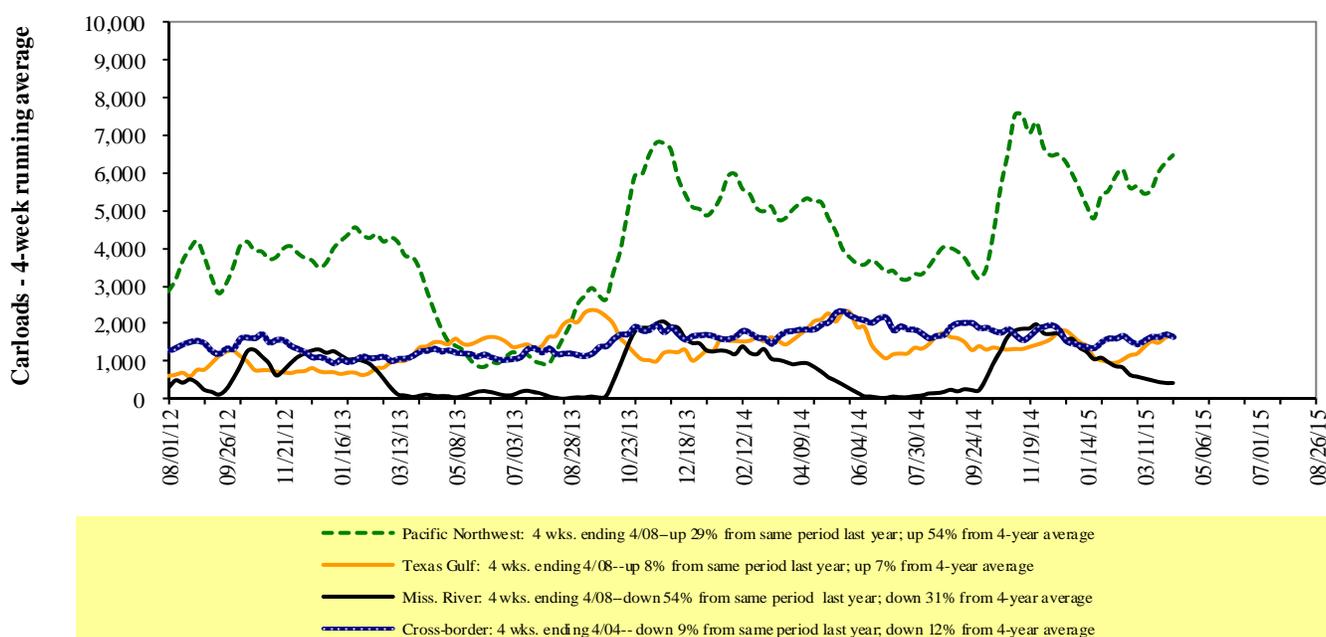
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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



Source: Transportation & Marketing Programs/AMS/USDA

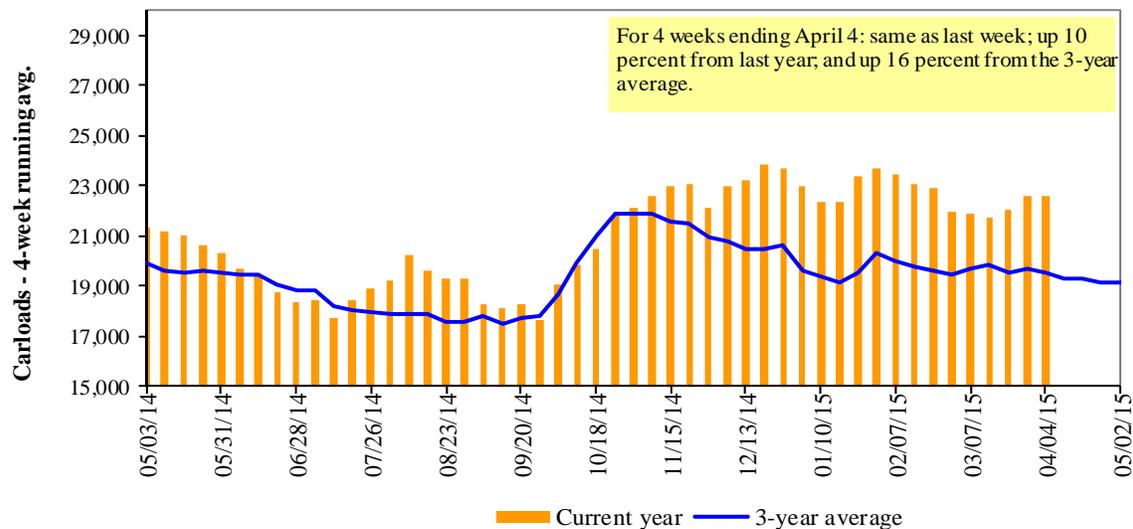
Table 4

**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
04/04/15	1,839	2,895	10,701	889	4,544	20,868	4,505	3,208
This week last year	1,676	3,247	8,967	884	4,967	19,741	4,631	4,929
2015 YTD	27,808	39,657	143,280	11,144	71,958	293,847	53,404	55,264
2014 YTD	25,878	39,185	113,192	12,652	75,225	266,132	52,457	62,232
2015 YTD as % of 2014 YTD	107	101	127	88	96	110	102	89
Last 4 weeks as % of 2014 <sup>1</sup>	98	98	135	99	88	111	92	83
Last 4 weeks as % of 3-yr avg. <sup>2</sup>	108	114	123	153	103	116	110	78
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

<sup>1</sup>The past 4 weeks of this year as a percent of the same 4 weeks last year.

<sup>2</sup>The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

**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							
	Apr-15	Apr-14	May-15	May-14	Jun-15	Jun-14	Jul-15	Jul-14
BNSF <sup>3</sup>								
COT grain units	no bids	no offer	no bids	no offer	no bids	no offer	10	no offer
COT grain single-car <sup>5</sup>	no offer	no offer	0 . . 5	no offer	0 . . 1	no offer	0 . . 57	no offer
UP <sup>4</sup>								
GCAS/Region 1	no offer	no offer	no bids	no offer	no bids	no offer	n/a	n/a
GCAS/Region 2	no offer	no offer	no bids	no offer	no bids	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.

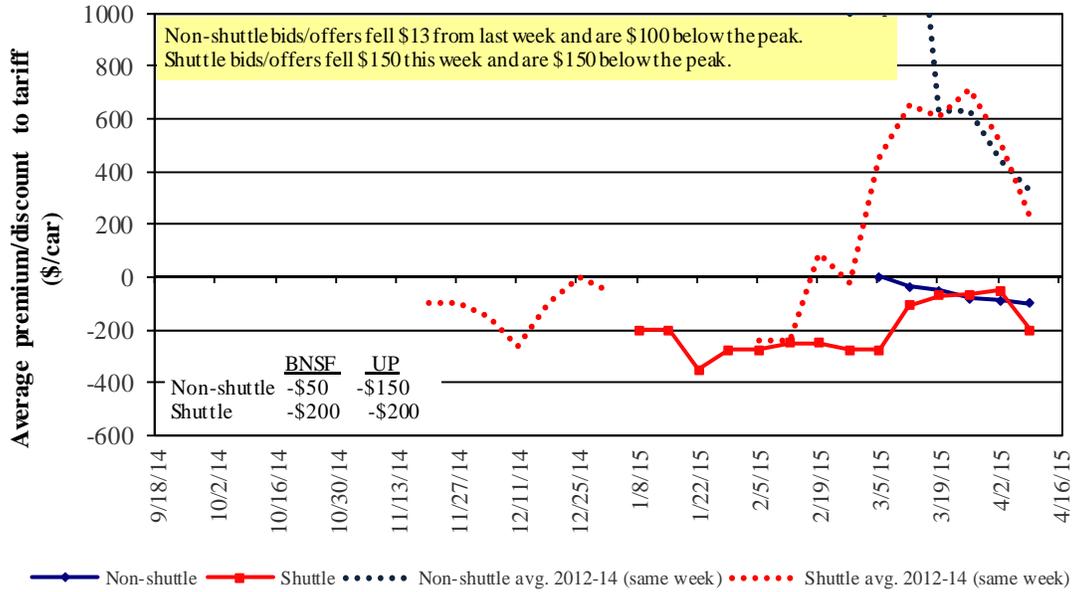
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 April 2015, Secondary Market**

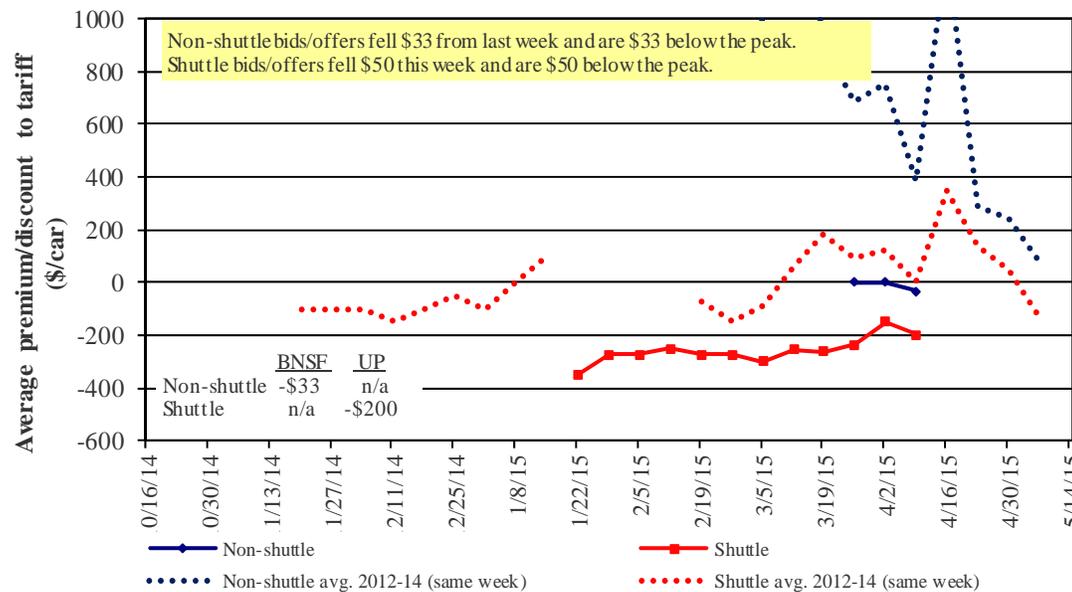


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

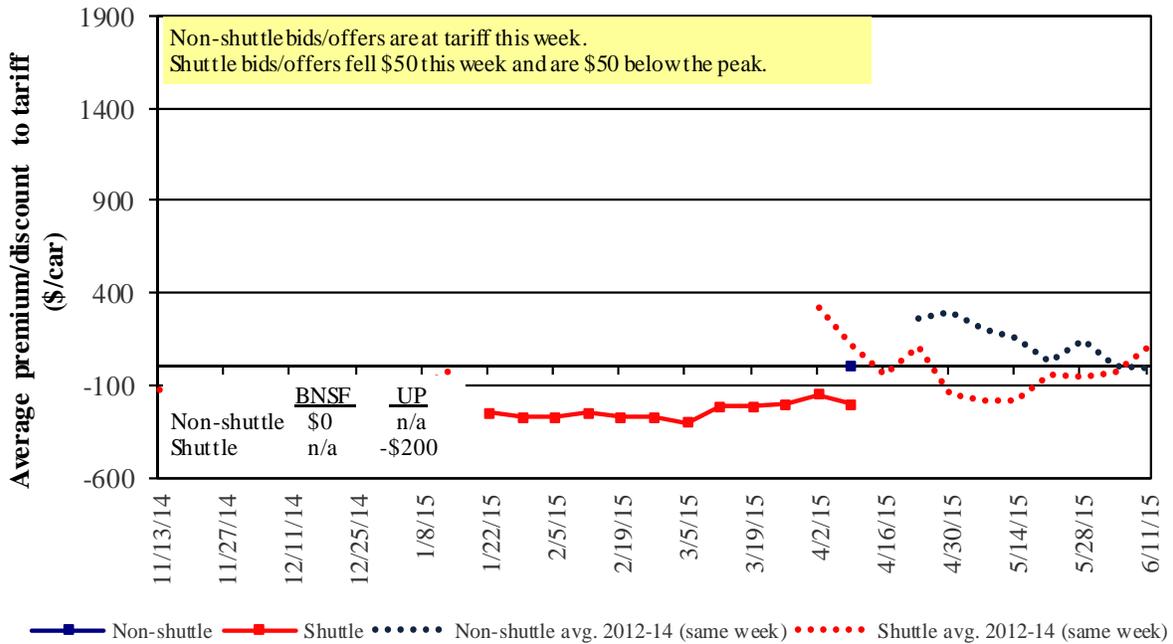


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in June 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					
	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15
<b>Non-shuttle</b>						
BNSF-GF	(50)	(33)	-	n/a	n/a	n/a
Change from last week	-	(33)	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	(150)	n/a	n/a	n/a	n/a	n/a
Change from last week	(25)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(1,150)	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(200)	n/a	n/a	n/a	n/a	n/a
Change from last week	(150)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(2,100)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(200)	(200)	(200)	(200)	(200)	(150)
Change from last week	(150)	(50)	(50)	(50)	(50)	n/a
Change from same week 2014	(850)	(750)	(650)	(600)	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>
4/1/2015	metric ton					bushel <sup>2</sup>		
<b>Unit train</b>								
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$81	\$34.44	\$0.94	3	
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$27	\$35.98	\$0.98	-2	
	Wichita, KS	Los Angeles, CA	\$6,244	\$138	\$63.37	\$1.72	-7	
	Wichita, KS	New Orleans, LA	\$4,026	\$142	\$41.39	\$1.13	1	
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$113	\$58.96	\$1.60	-6	
	Northwest KS	Galveston-Houston, TX	\$4,293	\$156	\$44.18	\$1.20	0	
	Amarillo, TX	Los Angeles, CA	\$4,492	\$217	\$46.76	\$1.27	-2	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,328	\$161	\$34.65	\$0.88	-2	
	Toledo, OH	Raleigh, NC	\$5,555	\$191	\$57.06	\$1.45	12	
	Des Moines, IA	Davenport, IA	\$2,168	\$34	\$21.87	\$0.56	2	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$143	\$48.70	\$1.24	12	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$92	\$41.67	\$1.06	14	
	Des Moines, IA	Little Rock, AR	\$3,308	\$100	\$33.84	\$0.86	-1	
	Des Moines, IA	Los Angeles, CA	\$4,852	\$292	\$51.08	\$1.30	-13	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,664	\$142	\$37.79	\$1.03	-1	
	Toledo, OH	Huntsville, AL	\$4,676	\$135	\$47.78	\$1.30	20	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$192	\$57.76	\$1.57	12	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$92	\$44.29	\$1.21	24	
	Champaign-Urbana, IL	New Orleans, LA	\$3,974	\$161	\$41.06	\$1.12	0	
<b>Shuttle Train</b>								
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$79	\$37.31	\$1.02	-6	
	Wichita, KS	Galveston-Houston, TX	\$3,471	\$62	\$35.08	\$0.95	-13	
	Chicago, IL	Albany, NY	\$4,723	\$179	\$48.68	\$1.32	13	
	Grand Forks, ND	Portland, OR	\$5,159	\$137	\$52.59	\$1.43	-8	
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$142	\$61.83	\$1.68	-7	
	Northwest KS	Portland, OR	\$5,260	\$256	\$54.77	\$1.49	-2	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	\$167	\$51.31	\$1.30	-9
Sioux Falls, SD		Tacoma, WA	\$4,960	\$153	\$50.77	\$1.29	-9	
Champaign-Urbana, IL		New Orleans, LA	\$3,147	\$161	\$32.85	\$0.83	-3	
Lincoln, NE		Galveston-Houston, TX	\$3,510	\$89	\$35.74	\$0.91	-7	
Des Moines, IA		Amarillo, TX	\$3,690	\$126	\$37.89	\$0.96	-2	
Minneapolis, MN		Tacoma, WA	\$5,000	\$165	\$51.29	\$1.30	-9	
Council Bluffs, IA		Stockton, CA	\$4,400	\$171	\$45.39	\$1.15	-11	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,520	\$153	\$56.33	\$1.53	-8	
	Minneapolis, MN	Portland, OR	\$5,530	\$167	\$56.57	\$1.54	-9	
	Fargo, ND	Tacoma, WA	\$5,430	\$136	\$55.27	\$1.50	-7	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$186	\$45.79	\$1.25	0	
	Toledo, OH	Huntsville, AL	\$3,851	\$135	\$39.59	\$1.08	26	
	Grand Island, NE	Portland, OR	\$5,360	\$262	\$55.83	\$1.52	-2	

<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: 4/1/2015

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	\$145	\$72.59	\$1.97	2
	OK	Cuautitlan, EM	\$6,565	\$176	\$68.87	\$1.87	-2
	KS	Guadalajara, JA	\$7,010	\$170	\$73.36	\$1.99	-4
	TX	Salinas Victoria, NL	\$3,885	\$66	\$40.38	\$1.10	0
Corn	IA	Guadalajara, JA	\$8,349	\$200	\$87.34	\$2.22	-3
	SD	Celaya, GJ	\$7,656	\$189	\$80.16	\$2.03	-7
	NE	Queretaro, QA	\$7,568	\$177	\$79.14	\$2.01	-4
	SD	Salinas Victoria, NL	\$5,880	\$144	\$61.55	\$1.56	-7
	MO	Tlalnepantla, EM	\$6,920	\$172	\$72.47	\$1.84	-5
	SD	Torreon, CU	\$6,922	\$159	\$72.35	\$1.84	-4
Soybeans	MO	Bojay (Tula), HG	\$8,311	\$168	\$86.64	\$2.36	-1
	NE	Guadalajara, JA	\$8,872	\$193	\$92.61	\$2.52	-2
	IA	El Castillo, JA	\$9,155	\$188	\$95.47	\$2.60	-3
	KS	Torreon, CU	\$7,189	\$120	\$74.67	\$2.03	-1
Sorghum	TX	Guadalajara, JA	\$7,253	\$123	\$75.37	\$1.91	-1
	NE	Celaya, GJ	\$7,287	\$172	\$76.21	\$1.93	-6
	KS	Queretaro, QA	\$6,845	\$108	\$71.04	\$1.80	-2
	NE	Salinas Victoria, NL	\$5,550	\$126	\$58.00	\$1.47	-4
	NE	Torreon, CU	\$6,518	\$141	\$68.04	\$1.73	-3

<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

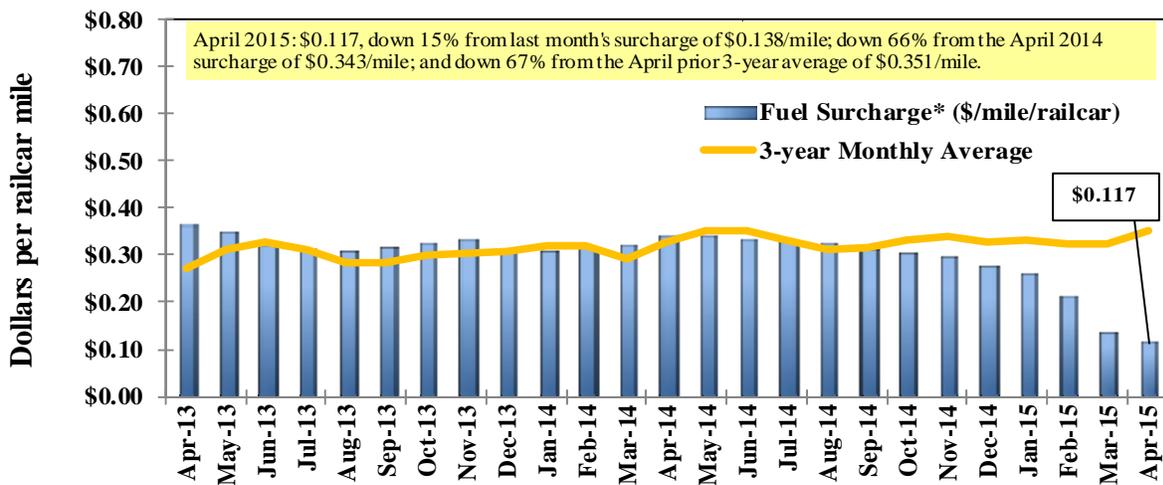
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

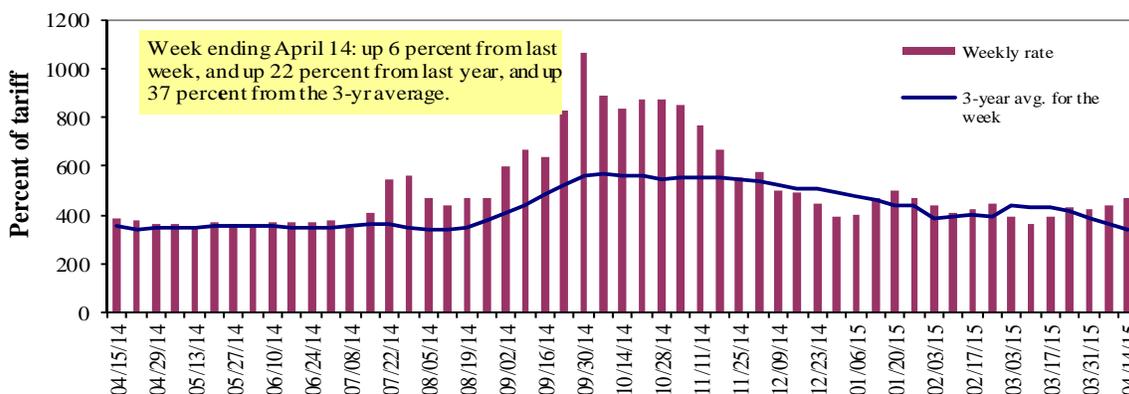
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	4/14/2015	450	455	467	373	355	355	308
	4/7/2015	443	438	440	345	358	358	300
<b>\$/ton</b>	4/14/2015	27.86	24.21	21.67	14.88	16.65	14.34	9.67
	4/7/2015	27.42	23.30	20.42	13.77	16.79	14.46	9.42
<b>Current week % change from the same week:</b>								
	Last year	-	17	22	42	20	20	43
	3-year avg. <sup>2</sup>	-	28	37	46	30	30	46
<b>Rate<sup>1</sup></b>	May	412	395	383	282	300	300	255
	July	418	372	375	275	267	267	255

<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:

(Rate \* 1976 tariff benchmark rate per ton)/100

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

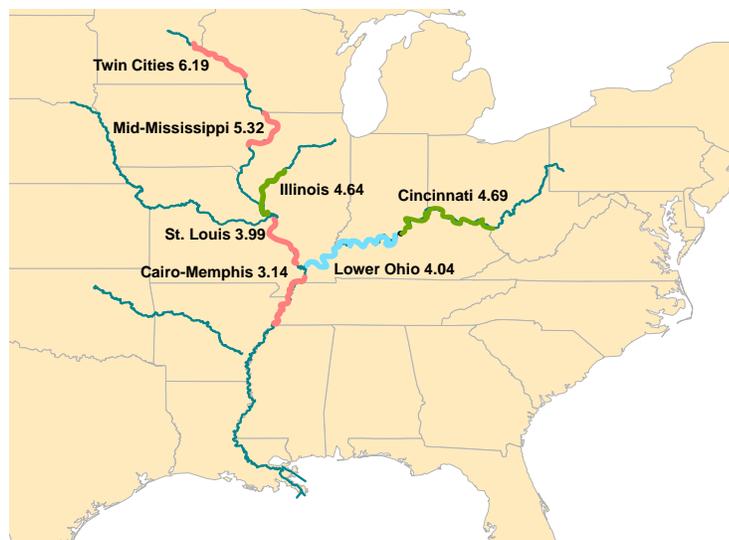
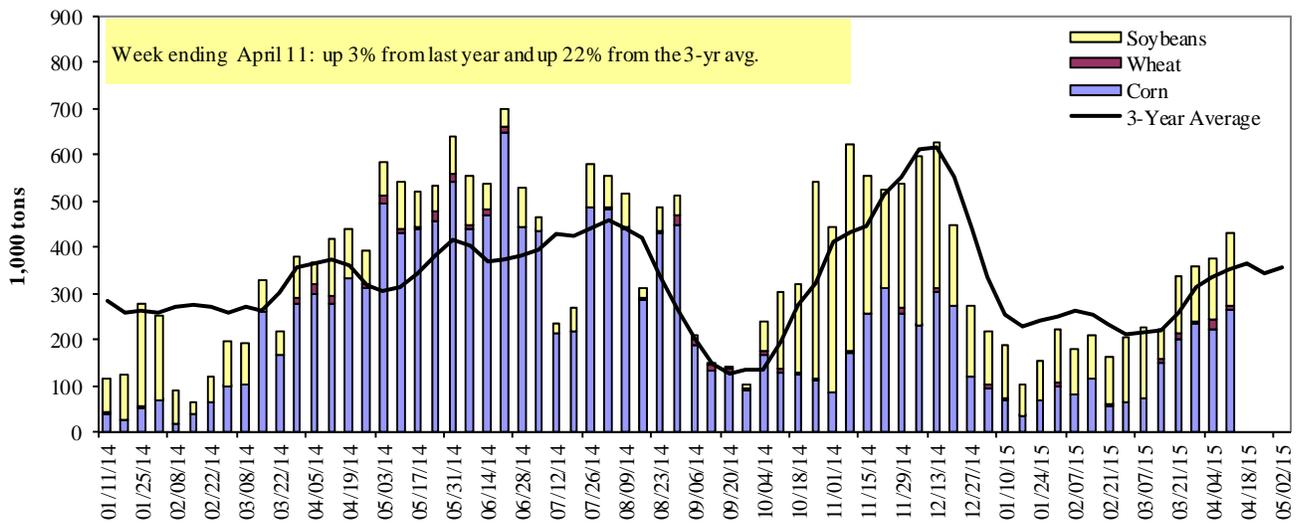


Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

**Barge Grain Movements (1,000 tons)**

Week ending 04/11/2015	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	76	0	60	0	136
Winfield, MO (L25)	137	3	127	0	267
Alton, IL (L26)	259	8	150	0	416
Granite City, IL (L27)	266	8	157	0	432
<b>Illinois River (L8)</b>	76	6	11	0	94
<b>Ohio River (L52)</b>	199	14	24	0	237
<b>Arkansas River (L1)</b>	3	17	21	4	45
Weekly total - 2015	468	39	203	4	714
Weekly total - 2014	485	60	157	6	708
2015 YTD <sup>1</sup>	4,155	339	3,461	67	8,021
2014 YTD	4,881	482	3,296	54	8,713
2015 as % of 2014 YTD	85	70	105	124	92
Last 4 weeks as % of 2014 <sup>2</sup>	81	54	160	123	93
Total 2014	20,693	2,181	11,813	258	34,946

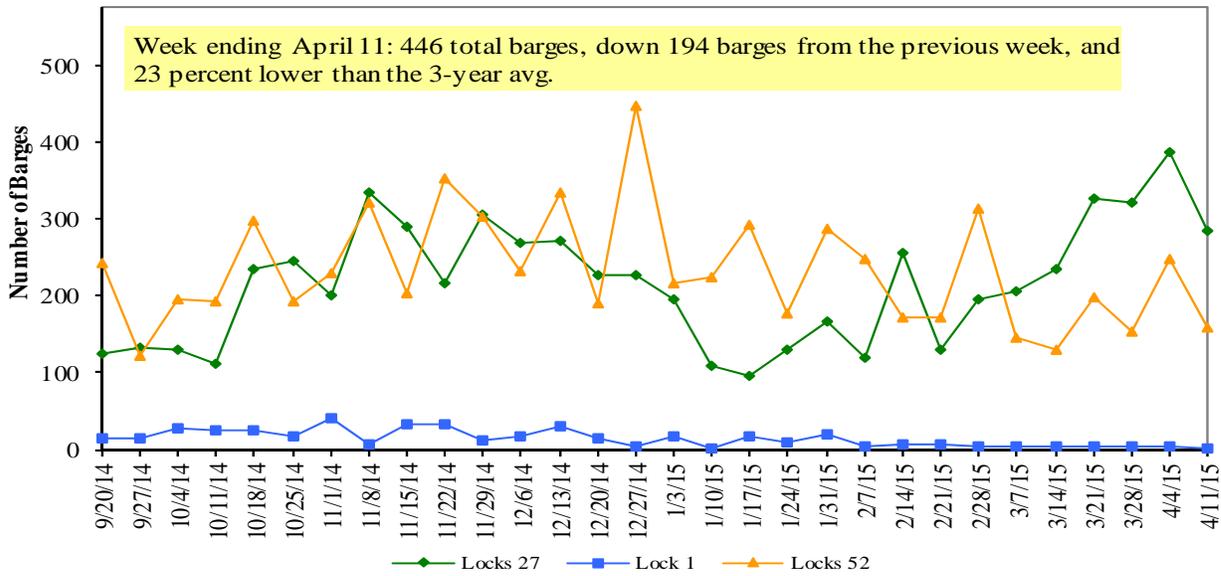
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

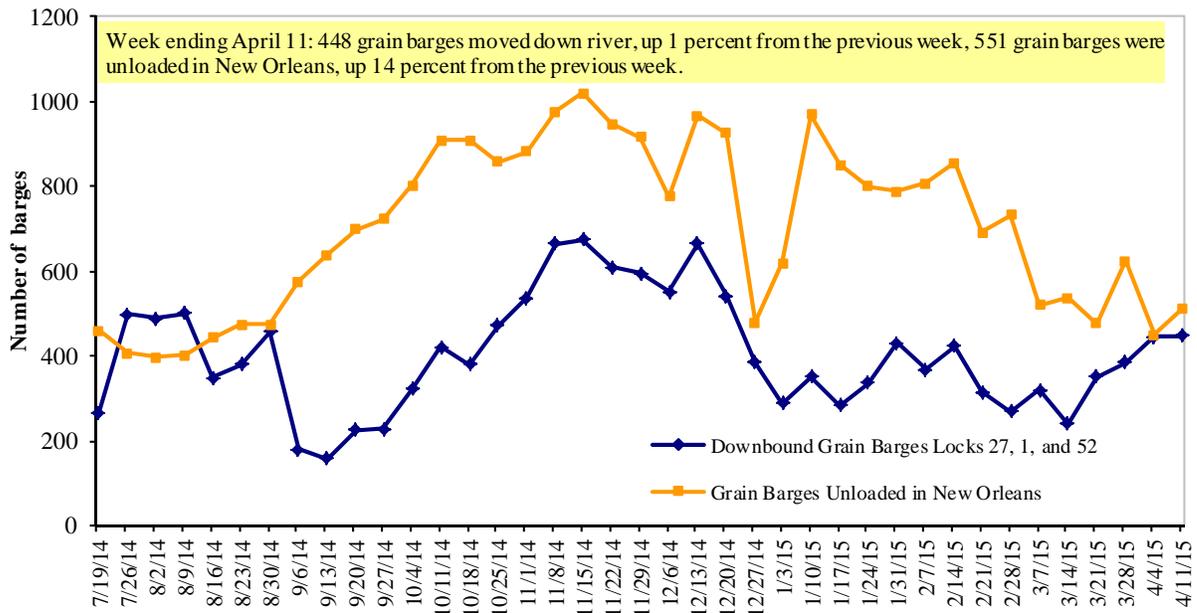
Source: U.S. Army Corps of Engineers

**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 04/13/2014 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.916	-0.034	-1.152
	New England	3.076	-0.038	-1.144
	Central Atlantic	3.080	-0.042	-1.113
	Lower Atlantic	2.759	-0.027	-1.188
II	Midwest <sup>2</sup>	2.633	-0.042	-1.299
III	Gulf Coast <sup>3</sup>	2.620	-0.023	-1.170
IV	Rocky Mountain	2.703	-0.022	-1.239
V	West Coast	2.914	-0.004	-1.067
	West Coast less California	2.720	-0.022	-1.173
	California	3.071	0.010	-0.985
Total	U.S.	2.754	-0.030	-1.198

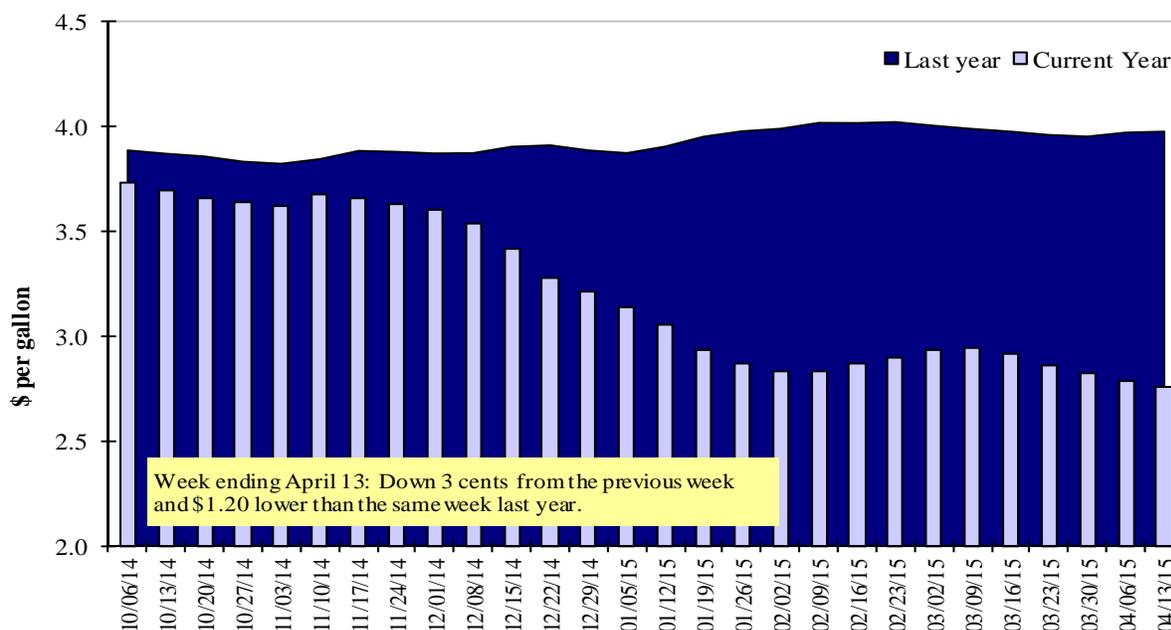
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
4/2/2015	1,372	694	1,489	652	89	4,296	14,368	3,803	22,467
This week year ago	1,594	764	1,367	908	130	4,762	17,951	3,395	26,108
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2014/15 YTD	5,832	3,097	6,133	3,277	595	18,934	23,661	44,517	87,112
2013/14 YTD	9,868	6,696	5,141	3,442	385	25,532	23,962	41,195	90,689
YTD 2014/15 as % of 2013/14	59	46	119	95	155	74	99	108	96
Last 4 wks as % of same period 2013/14	93	93	117	69	86	95	84	141	93
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 04/02/2015	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	8,230	9,013	(9)	10,079
Mexico	9,237	9,269	(0)	8,145
Korea	2,527	2,847	(11)	2,965
Colombia	3,302	2,464	34	3,461
Taiwan	1,383	1,373	1	1,238
<b>Top 5 Importers</b>	<b>24,679</b>	<b>24,966</b>	<b>(1)</b>	<b>25,887</b>
<b>Total US corn export sales</b>	<b>38,028</b>	<b>41,912</b>	<b>(9)</b>	<b>34,445</b>
% of Projected	83%	86%		
Change from prior week	640	913		
<b>Top 5 importers' share of U.S. corn export sales</b>	65%	60%		75%
<b>USDA forecast, March 2015</b>	<b>45,720</b>	<b>48,700</b>	<b>(6)</b>	
<b>Corn Use for Ethanol USDA forecast, March 2015</b>	<b>132,080</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 04/02/2015	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	29,649	27,712	7	24,211
Mexico	2,921	2,994	(2)	2,971
Indonesia	1,552	1,915	(19)	1,895
Japan	1,574	1,671	(6)	1,750
Taiwan	1,120	1,062	6	1,055
<b>Top 5 importers</b>	<b>36,815</b>	<b>35,354</b>	<b>4</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>48,320</b>	<b>44,590</b>	<b>8</b>	<b>39,169</b>
% of Projected	99%	99%		
Change from prior week*	(177)	79		
<b>Top 5 importers' share of U.S. soybean export sales</b>	76%	79%		<b>81%</b>
<b>USDA forecast, March 2015</b>	<b>48,720</b>	<b>44,820</b>	<b>9</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 Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm. (Carryover plus Accumulated Exports)

\* Includes revisions to previous week's data.

Table 15

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

Week Ending 04/02/2015	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	2,964	2,817	5	3,243
Mexico	2,716	2,923	(7)	3,066
Nigeria	1,952	2,690	(27)	2,960
Philippines	2,305	1,996	15	2,006
China	436	4,259	(90)	1,830
Brazil	1,534	3,981	(61)	1,617
Korea	1,208	1,217	(1)	1,552
Taiwan	984	950	4	969
Indonesia	635	971	(35)	813
Colombia	549	724	(24)	610
<b>Top 10 importers</b>	<b>15,282</b>	<b>22,528</b>	<b>(32)</b>	<b>18,665</b>
<b>Total US wheat export sales</b>	<b>23,230</b>	<b>30,295</b>	<b>(23)</b>	<b>27,696</b>
% of Projected	95%	95%		
Change from prior week*	320	42		
<b>Top 10 importers' share of U.S. wheat export sales</b>	66%	74%		67%
<b>USDA forecast, March 2015</b>	<b>24,490</b>	<b>32,010</b>	<b>(23)</b>	

(n) indicates negative number.

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

Table 16

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

Port regions	Week ending 04/09/15	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	170	159	107	3,227	3,111	104	65	68	12,436
Corn	264	328	80	2,760	1,613	171	182	184	7,781
Soybeans	206	217	95	4,001	4,393	91	100	119	12,887
<b>Total</b>	<b>639</b>	<b>703</b>	<b>91</b>	<b>9,987</b>	<b>9,117</b>	<b>110</b>	<b>106</b>	<b>114</b>	<b>33,104</b>
<b>Mississippi Gulf</b>									
Wheat	91	114	80	1,180	1,182	100	103	72	4,495
Corn	486	531	92	7,303	8,245	89	55	89	30,912
Soybeans	194	308	63	8,895	9,086	98	84	117	29,087
<b>Total</b>	<b>770</b>	<b>952</b>	<b>81</b>	<b>17,379</b>	<b>18,514</b>	<b>94</b>	<b>67</b>	<b>94</b>	<b>64,495</b>
<b>Texas Gulf</b>									
Wheat	140	84	166	1,020	1,765	58	63	68	6,120
Corn	0	0	n/a	175	174	100	176	109	580
Soybeans	0	0	n/a	182	254	72	n/a	0	949
<b>Total</b>	<b>140</b>	<b>84</b>	<b>166</b>	<b>1,377</b>	<b>2,193</b>	<b>63</b>	<b>69</b>	<b>71</b>	<b>7,649</b>
<b>Interior</b>									
Wheat	33	39	83	354	314	113	82	114	1,400
Corn	91	142	64	1,514	1,420	107	79	93	5,677
Soybeans	62	52	118	1,123	1,356	83	77	68	4,312
<b>Total</b>	<b>186</b>	<b>234</b>	<b>79</b>	<b>2,991</b>	<b>3,090</b>	<b>97</b>	<b>129</b>	<b>86</b>	<b>11,389</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	12	0	n/a	n/a	0	935
Corn	0	0	n/a	0	0	n/a	n/a	0	288
Soybeans	0	0	n/a	1	0	n/a	n/a	166	988
<b>Total</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>13</b>	<b>0</b>	<b>n/a</b>	<b>n/a</b>	<b>2</b>	<b>2,211</b>
<b>Atlantic</b>									
Wheat	36	1	n/a	174	52	331	515	808	553
Corn	0	9	0	23	79	30	38	74	816
Soybeans	8	17	47	772	924	84	44	84	2,119
<b>Total</b>	<b>44</b>	<b>26</b>	<b>168</b>	<b>969</b>	<b>1,055</b>	<b>92</b>	<b>82</b>	<b>156</b>	<b>3,487</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	469	397	118	5,966	6,425	93	79	74	25,939
Corn	841	1,009	83	11,775	11,531	102	77	109	46,054
Soybeans	470	594	79	14,974	16,013	94	82	108	50,342
<b>Total</b>	<b>1,780</b>	<b>2,000</b>	<b>89</b>	<b>32,715</b>	<b>33,969</b>	<b>96</b>	<b>79</b>	<b>98</b>	<b>122,335</b>

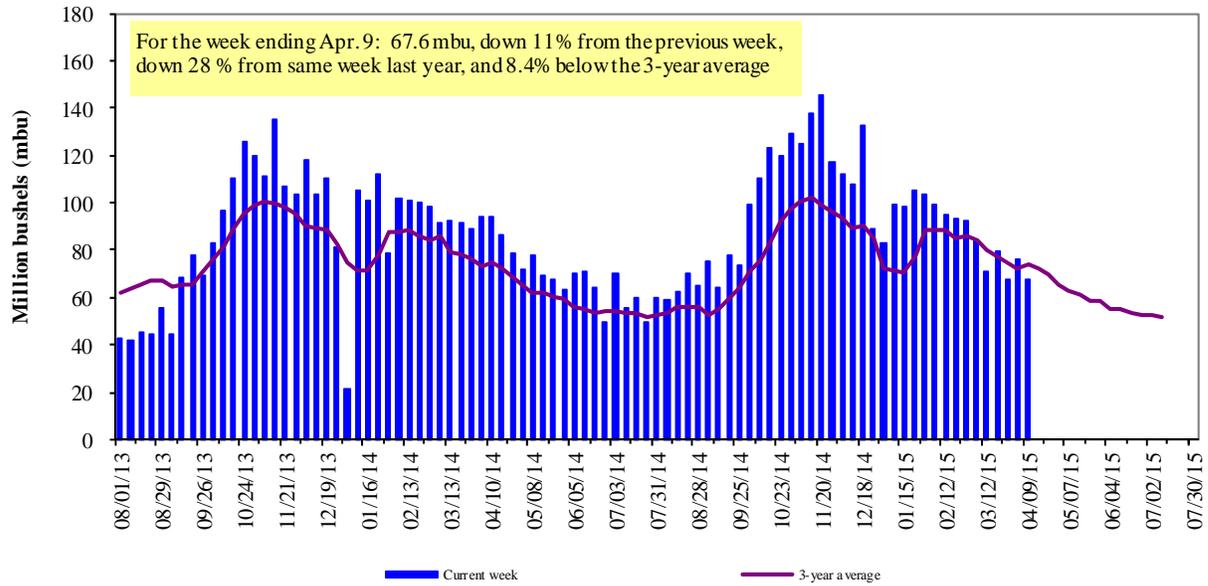
<sup>1</sup> Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2014.

Figure 14

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

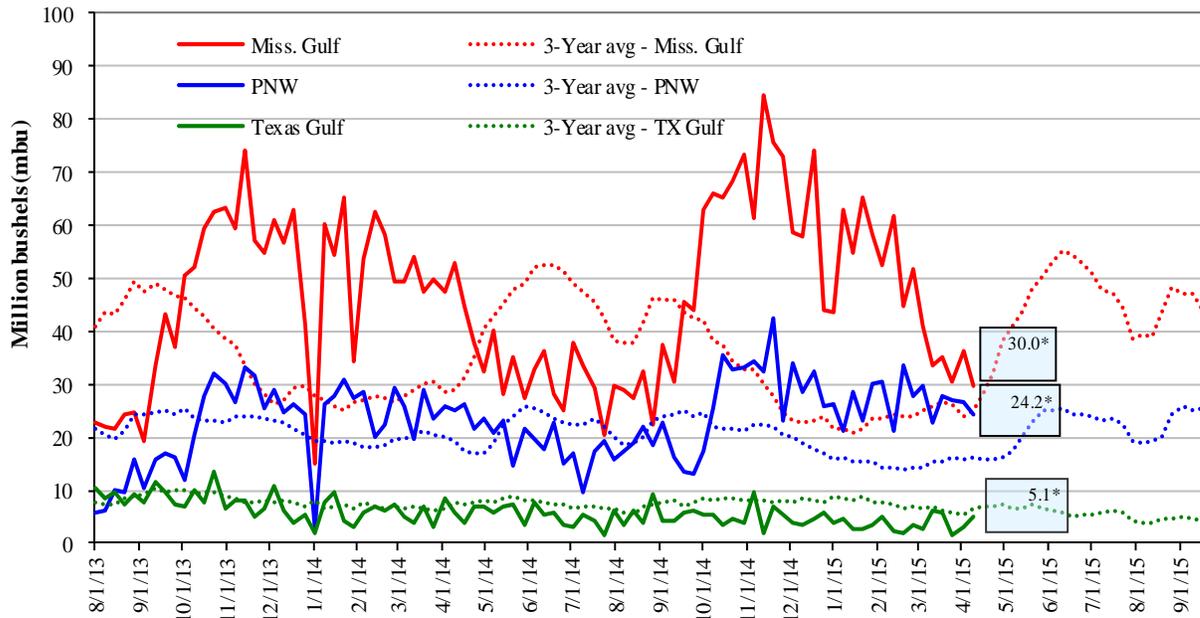


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

<u>Apr. 9: % change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 19	up 67	down 12	down 9
Last year (same week)	down 44	down 11	down 41	down 3
3-yr avg. (4-wk mov. avg.)	down 16	down 6.4	down 15	up 11

# Ocean Transportation

Table 17

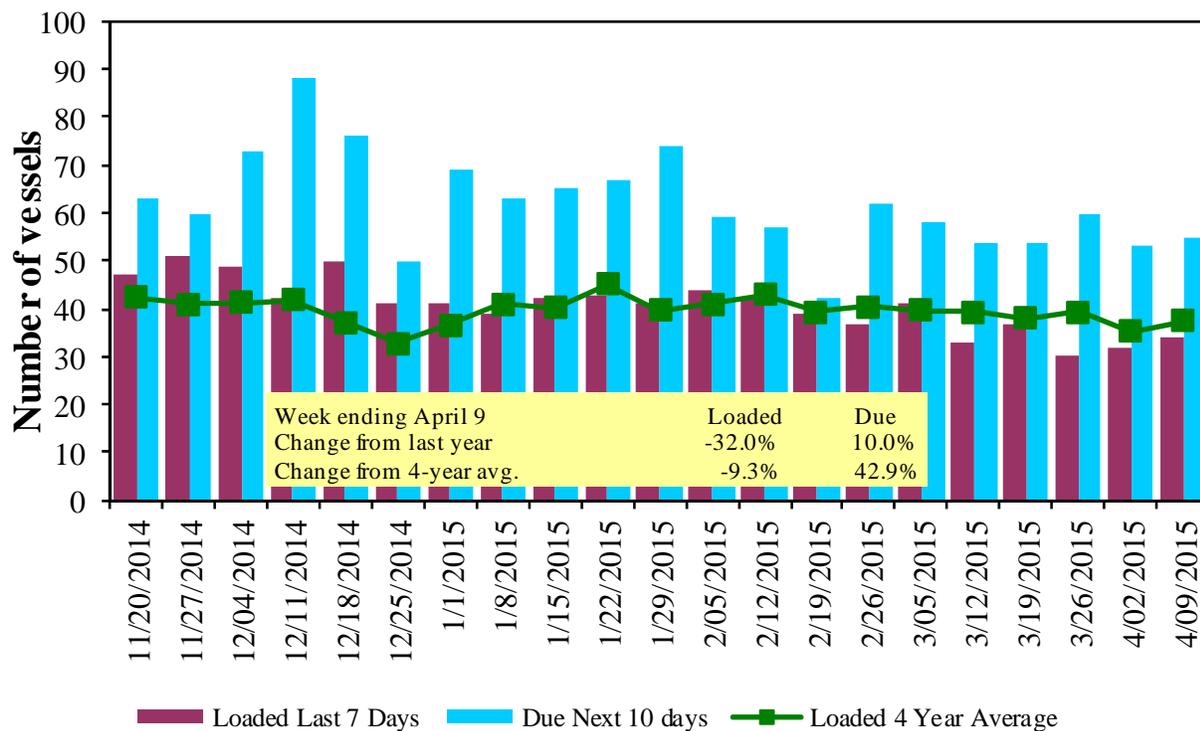
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/9/2015	48	34	55	14	n/a
4/2/2015	47	32	53	14	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**

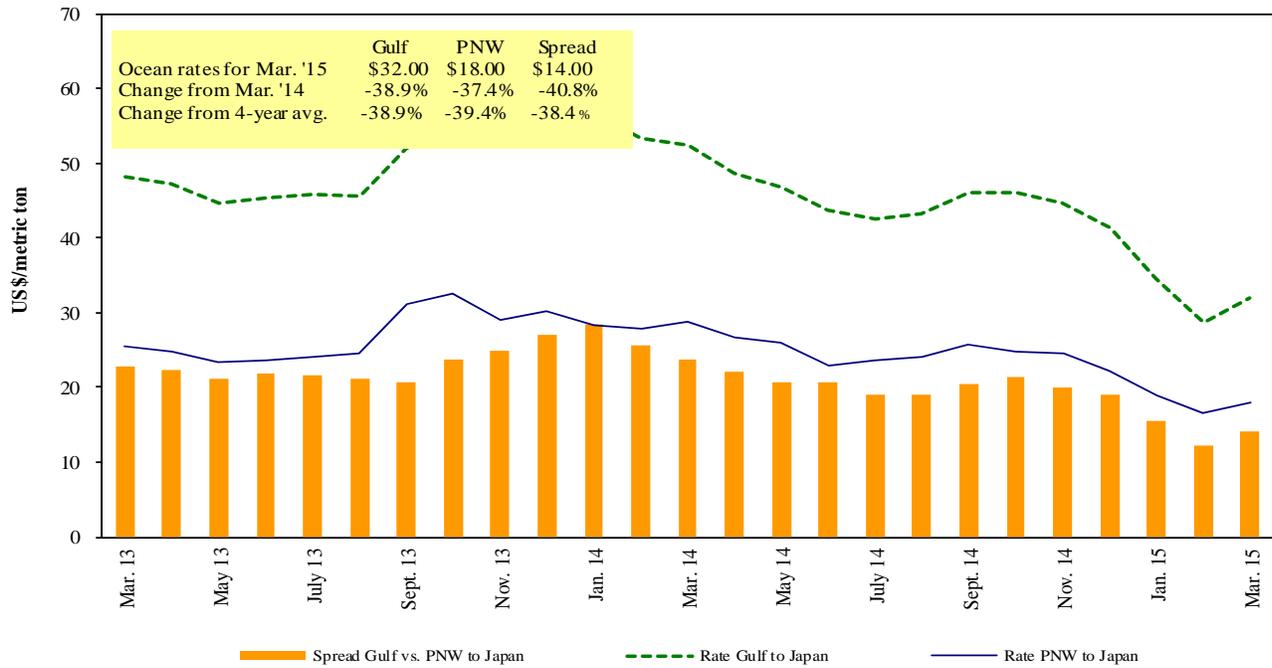


Source: Transportation & Marketing Programs/AMS/USDA

<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 4/11/2015**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Apr 1/10	55,000	30.75
U.S. Gulf	China	Heavy Grain	Mar 5/14	58,000	30.75
U.S. Gulf	Cameroon <sup>1</sup>	Sorghum	Mar 16/26	7,960	136.16
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Apr 21/May 4	4,530	88.60
U.S. Gulf	Pt. Sudan <sup>1</sup>	Sorghum	Apr 17/25	47,500	82.75
PNW	China	Grain	Mar 16/25	60,000	15.25
Brazil	China	Heavy Grain	Jun 1/30	60,000	22.75
Brazil	China	Grain	Apr 15/May 31	60,000	24.50
Brazil	China	Heavy Grain	May 15/10	60,000	22.75
Brazil	China	Heavy Grain	May 1/10	60,000	23.00
Brazil	China	Heavy Grain	May 1/10	60,000	22.50
Brazil	China	Heavy Grain	Apr 10/20	60,000	23.50
Brazil	China	Heavy Grain	Apr 21/30	60,000	30.00
Brazil	China	Heavy Grain	Mar 25/Apr 4	60,000	21.50
Brazil	China	Heavy Grain	Mar 17/26	60,000	21.00
Brazil	Vietnam	Heavy Grain	Mar 31/Apr 5	60,000	24.50
France	China	Barley	Apr 16/25	63,000	26.00
River Plate	Japan	Heavy Grain	Apr 6/15	43,000	34.50

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

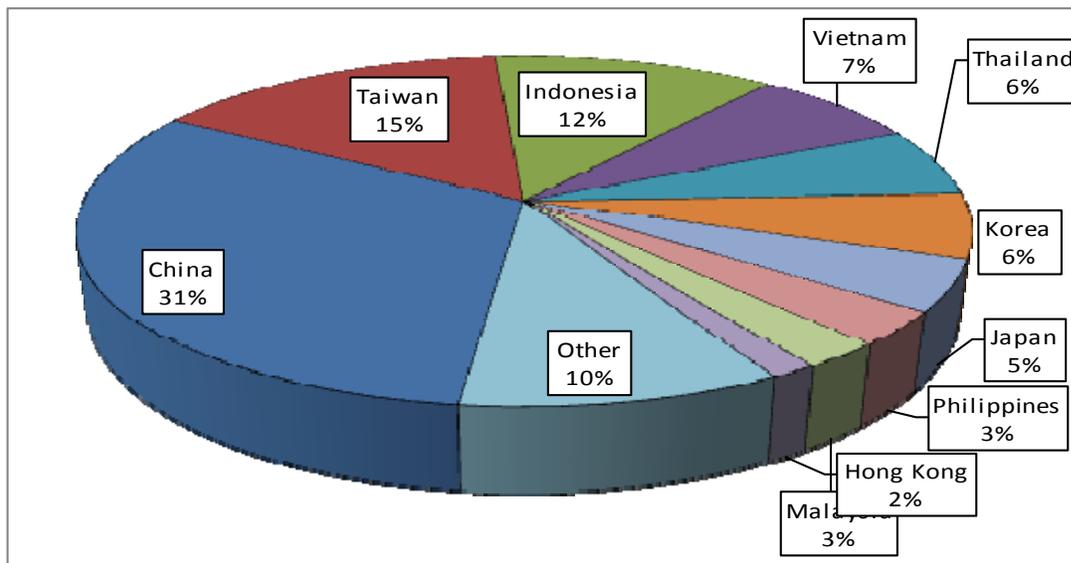
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-December 2014**

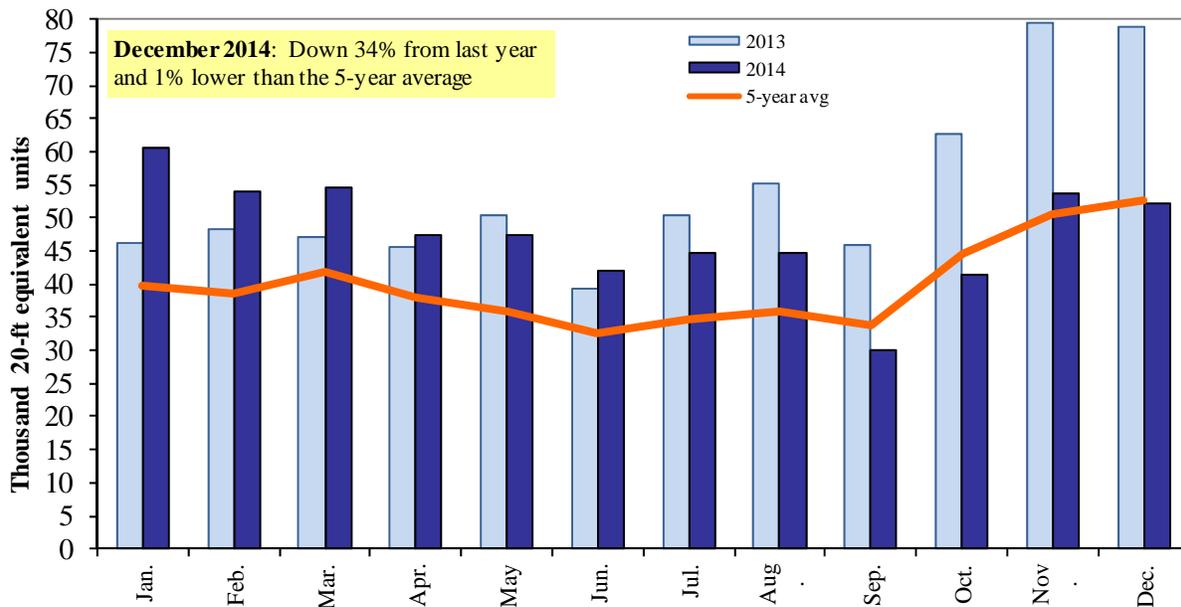


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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