



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service  
[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

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May 7, 2015

## WEEKLY HIGHLIGHTS

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### Weekly Grain Export Sales Mixed

For the week ending April 23, net weekly export sales were strong for corn and soybeans, but some wheat sales were canceled. Net weekly **corn export sales** reached 0.833 million metric tons (mmt), down 4 percent from the previous week but 33 percent higher than the prior 4-week average, with highest sales reported to Japan, Saudi Arabia, and Mexico. **Soybean export sales** of 0.433 mmt were up significantly from the previous week and from the prior 4-week average, with highest sales reported to China and other Asian destinations. As the wheat marketing year draws to a close by the end of May, **wheat export sales** had a net reduction of 0.449 mmt from the previous week, making this week a marketing-year-low level. Most of the cancelations were reported for a variety of destinations, including Asia and Central America. **Unshipped balances** of wheat, corn, and soybeans totaled 19.9 mmt, 13 percent lower than at the same time last year.

### Grain Inspections Recede; Lowest Since August

For the week ending April 30, **total inspections of grain** (corn, wheat, and soybeans) from all major export regions reached 1.55 mmt, down 30 percent from the past week, down 18 percent from last year, and 9 percent below the 3-year average. Grain inspections were the lowest since early August of last year. Inspections of each of the three major grains were down from the past week, as were inspections in each of the major export regions. Inspections of grain during the last four weeks were 20 percent below last year but 6 percent above the 3-year average.

### Grain Barge Rates Decline as River Conditions Improve

Navigation conditions on the Upper Mississippi and Ohio Rivers continue to improve as water levels have dropped since reaching the highest year-to-date levels during the first half of April. The higher water levels and faster currents reduced barge efficiencies by reducing tow sizes and slowing transit times. Since April 14, barge rates for export grain have declined for 3 straight weeks. St. Louis to Gulf barge rates dropped from 373 percent of tariff (\$14.88 per ton) to 273 percent of tariff (\$10.89 per ton) by May 5, but are still higher than the 5-year average of 258 percent of tariff (\$10.29 per ton) for the month of May. Year-to-date tonnages on the locking portions of the Mississippi, Ohio, and Arkansas River are 11 percent higher than the 5-year average.

## Snapshots by Sector

### **Rail**

U.S. railroads originated 19,909 **carloads of grain** during the week ending April 25, up 10 percent from last week, down 9 percent from last year, and 4 percent higher than the 3-year average.

During the week ending April 30, average May shuttle **secondary railcar bids/offers per car** were \$200 below tariff, up \$100 from last week and \$738 lower than last year. Non-shuttle secondary railcar bids/offers were \$125 below tariff, up \$13 from last week and \$825 lower than last year.

### **Barge**

During the week ending May 2, **barge grain movements** totaled 849,706 tons—about 24 percent higher than the previous week and 8 percent higher than the same period last year.

During the week ending May 2, 540 grain barges **moved down river**, up 25 percent from last week; 582 grain barges were **unloaded in New Orleans**, down 11 percent from the previous week.

### **Ocean**

During the week ending April 30, 35 **ocean-going grain vessels** were loaded in the Gulf, 3 percent less than the same period last year. Fifty-six vessels are expected to be loaded within the next 10 days, 19 percent more than the same period last year.

During the week ending May 1, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$30.75 per metric ton (mt), 1 percent less than 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 May 4, U.S. **diesel fuel prices** averaged \$2.85 per gallon, 4 cents higher than the previous week. They were down \$1.11 from the same week last year.

# Feature Article/Calendar

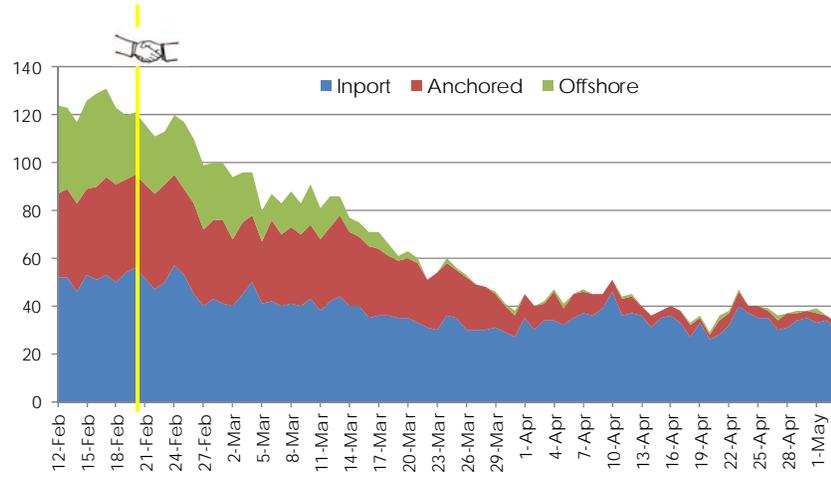
## West Coast Container Port Recovery Progress

This article provides a status update and follows up on the [GTR March 12](#) feature article about the effects of the West Coast port disruptions on agricultural exports.

The longest ever period of disruptions at the West Coast container ports appears to be over with a return to seemingly normal vessel activity. While daily terminal operations at West Coast ports may not be as efficient as shippers would like, the containership backlog is dramatically improved. In less than two months since the February 20<sup>th</sup> agreement was reached between the Pacific Maritime Association (PMA) and the International

Longshore and Warehouse Union (ILWU), and through April, almost no ships have been waiting offshore along the West Coast and very few are waiting in anchorage areas. This reduction in backlog is down significantly from almost 80 ships that were waiting offshore or at anchorage in the days just prior to February 20, with over 50 ships at dock.

**Figure 1 - West Coast Daily Vessel Activity, February 12 – May 3, 2015**

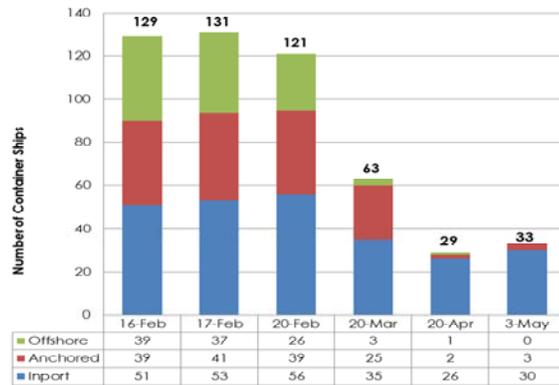


Feb. 20, 2015 PMA-ILWU Tentative Agreement Reached  
 Source: Office of Policy and Plans, Maritime Administration (MARAD), United States Department of Transportation

### Vessel Activity

The backlog of container ships at the West Coast ports peaked on February 17 at a total of 131 container ships.<sup>1</sup> The backlog gradually decreased over the following six to eight weeks, and daily vessel activity has been relatively stable since mid-April (see figures 1 and 2). By March 20, the number of ships waiting offshore at West Coast ports decreased to 3 from a peak of 39 reached on February 16 (see figure 2). Since mid-April, vessel activity indicates that the number of container ships receiving dock service (inport) has ranged between 30 and 40 per day. The number of ships waiting in anchorage or offshore has been below 10 per day since early April.

**Figure 2 – West Coast Vessel Activity at a Glance**



<sup>1</sup> Source: Office of Policy and Plans, Maritime Administration (MARAD), U.S. Department of Transportation: On February 17, the number of vessels at dock or inport, receiving or awaiting service, totaled 53 ships (area shaded blue in figures 1 and 2); 41 vessels were waiting in anchorage areas (area shaded red in figures 1 and 2); and, 37 vessels were waiting in offshore areas along the West Coast.

### Port of Portland

While most West Coast container traffic is returning to normal, developments at the Port of Portland are concerning to some agricultural exporters using this port. Two major ocean liners that provide container service at Portland announced they will not be returning. If Portland never recovers the container business it lost, agricultural exporters depending on that port will likely face more expensive transportation options, such as trucking longer distances from Oregon or Idaho to the ports in Seattle and Tacoma, Washington, at a cost of an extra \$600 to \$1,200 per container.<sup>1</sup>

### Agreement Status

The full membership of ILWU is participating in a secret ballot ratification vote on the proposed labor agreement that was previously approved by ILWU Caucus delegates. A final tally will be conducted on May 22.

### Port Congestion Fees

Agricultural shippers have complained that they are being charged excessive fees due to port congestion. The shippers indicated that the Federal Maritime Commission's (FMC) Consumer Affairs and Dispute Resolution Service (CADRS) is helping resolve complaints about disputed detention and demurrage charges. On April 27, the Agriculture Transportation Coalition sent a broad industry letter urging the FMC to take further action, such as a blanket directive that no per diem charges for detention or demurrage shall be assessed against the shippers or truckers due to port congestion beyond their control. These agricultural stakeholders believe it is unrealistic and burdensome to require individual exporters and importers to file for a waiver for each per diem charge.

### New Report on Port Infrastructure

On April 21, the American Association of Port Authorities (AAPA) released a report titled "Port Surface Transportation Infrastructure Survey – The State of Freight." Key survey results indicated that "nearly 80 percent of AAPA ports surveyed said they anticipate a minimum of \$10 million investment being needed in their port's intermodal connectors through 2025, while 30 percent anticipate at least \$100 million will be needed." The survey also identified port congestion as a costly issue for the ports over the past 10 years, causing port productivity to decline by 25 percent or more. <[http://aapa.files.cms-plus.com/StateofFreight\\_Report\\_final.pdf](http://aapa.files.cms-plus.com/StateofFreight_Report_final.pdf)>

### Shift in West Coast Activity May Be Causing Congestion at Other Ports

In recent months, nationwide media coverage of port congestion issues has spread to container ports outside of the West Coast as trade patterns may have shifted and more containership traffic is going to Gulf and East Coast ports. U.S. port congestion issues will continue to be an important area to watch as many ports along the East Coast and the Gulf of Mexico prepare for more large containerships to use the new and larger locks at the Panama Canal next year and the widening of the Suez Canal planned by 2023. [marina.denicoff@ams.usda.gov](mailto:marina.denicoff@ams.usda.gov)

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<sup>1</sup> Source: media reports quoting Port of Portland officials.

# Grain Transportation Indicators

Table 1

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

Week ending	Truck	Rail	Barge	Ocean	
		Unit Train	Shuttle	Gulf	Pacific
05/06/15	192	245	204	138	121
04/29/15	189	238	192	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)

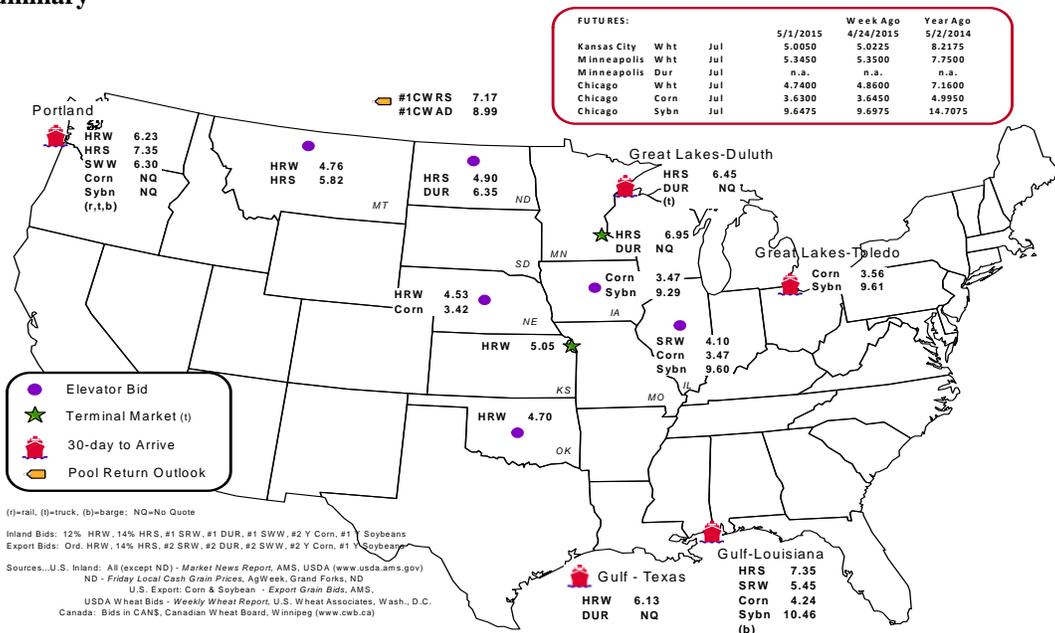
Commodity	Origin--Destination	5/1/2015	4/24/2015
Corn	IL--Gulf	-0.77	-0.78
Corn	NE--Gulf	-0.82	-0.83
Soybean	IA--Gulf	-1.17	-1.12
HRW	KS--Gulf	-1.08	-1.15
HRS	ND--Portland	-2.45	-2.42

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				
4/29/2015 <sup>p</sup>	216	1,557	3,043	296	5,112	4/25/2015	2,060	
4/22/2015 <sup>r</sup>	328	1,898	3,371	247	5,844	4/18/2015	2,295	
2015 YTD <sup>r</sup>	10,012	23,934	91,200	11,003	136,149	2015 YTD	28,559	
2014 YTD <sup>r</sup>	18,509	28,378	88,914	13,731	149,532	2014 YTD	29,822	
2015 YTD as % of 2014 YTD	54	84	103	80	91	% change YTD	96	
Last 4 weeks as % of 2014 <sup>2</sup>	29	91	79	55	76	Last 4wks % 2014	103	
Last 4 weeks as % of 4-year avg. <sup>2</sup>	67	111	116	81	109	Last 4wks % 4 yr	91	
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.

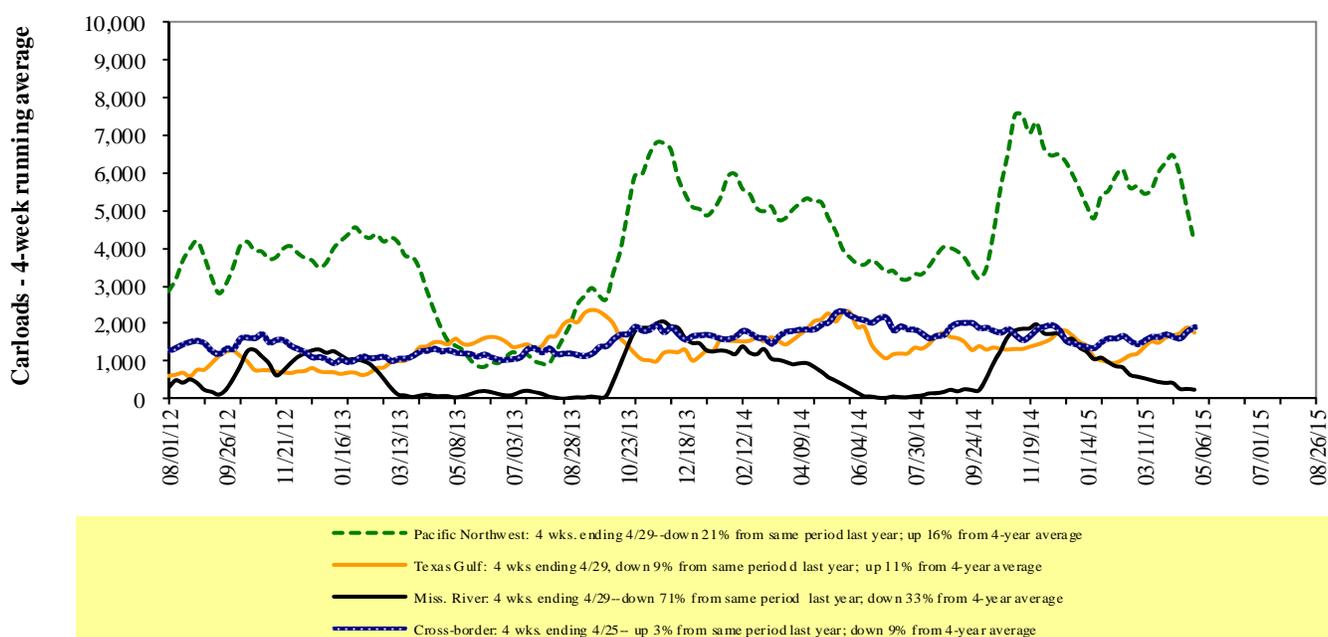
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

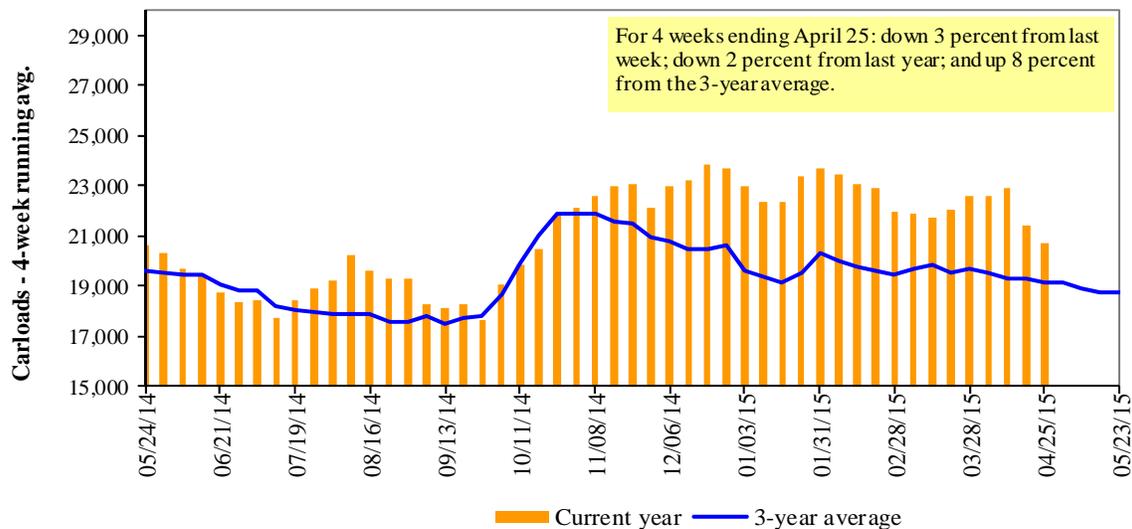
Table 4

**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
04/25/15	2,152	3,324	8,776	395	5,262	19,909	4,192	3,658
This week last year	1,460	3,382	10,337	1,264	5,402	21,845	5,451	6,162
2015 YTD	33,697	49,085	172,269	13,273	87,339	355,663	65,772	69,011
2014 YTD	31,202	48,670	141,888	15,535	93,024	330,319	68,182	80,301
2015 YTD as % of 2014 YTD	108	101	121	85	94	108	96	86
Last 4 weeks as % of 2014 <sup>1</sup>	99	97	108	84	86	98	85	74
Last 4 weeks as % of 3-yr avg. <sup>2</sup>	109	114	108	125	101	108	99	76
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							
	May-15	May-14	Jun-15	Jun-14	Jul-15	Jul-14	Aug-15	Aug-14
BNSF <sup>3</sup>								
COT grain units	0	no offer	0	no offer	0	no offer	111	no offer
COT grain single-car <sup>5</sup>	0 . . 19	no offer	0 . . 55	no offer	19 . . 55	no offer	6 . . 105	no offer
UP <sup>4</sup>								
GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	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.

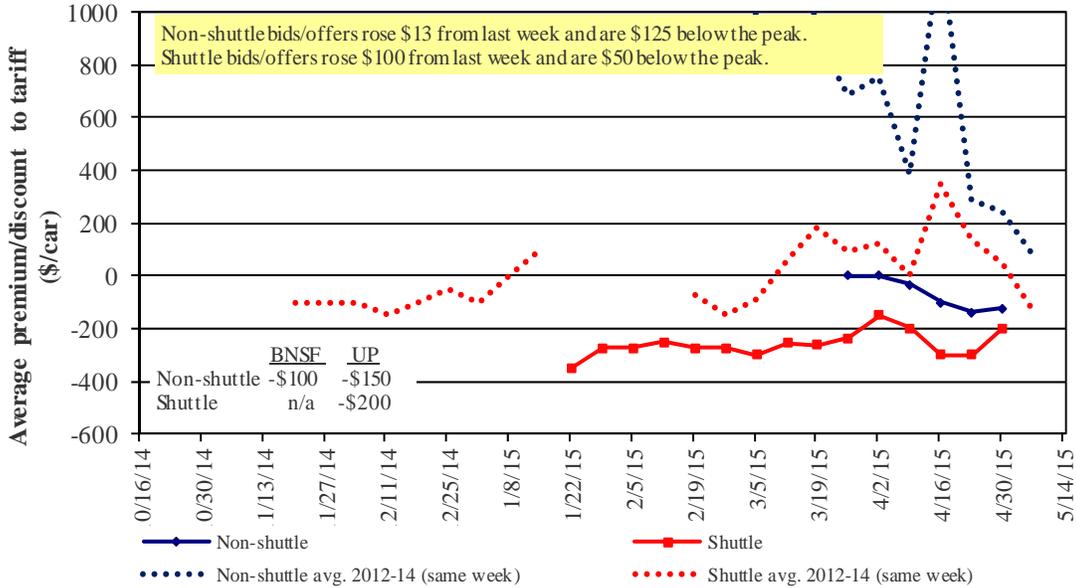
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 May 2015, Secondary Market**

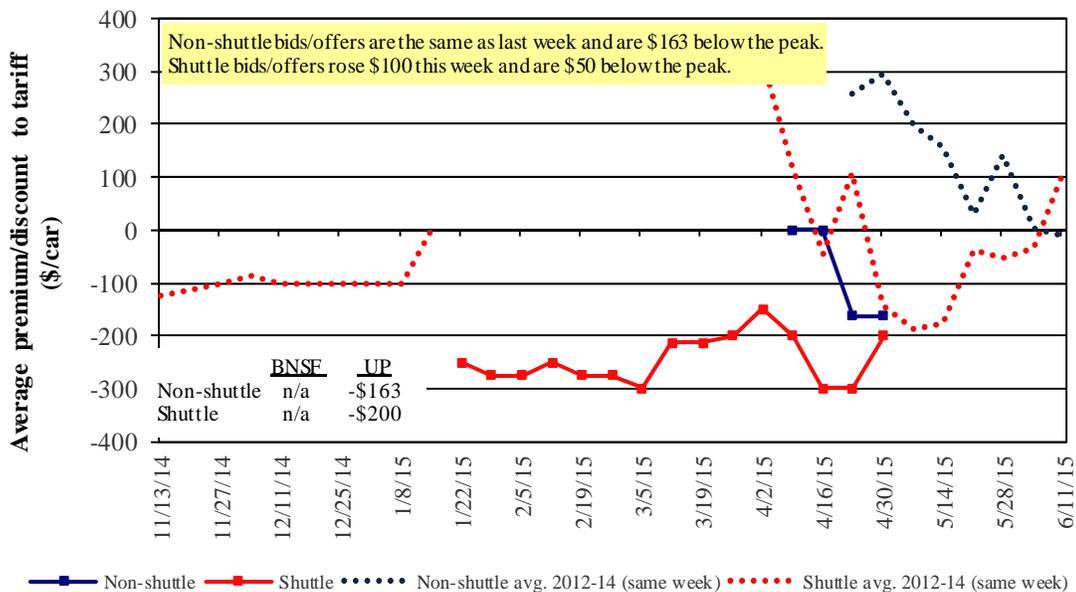


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

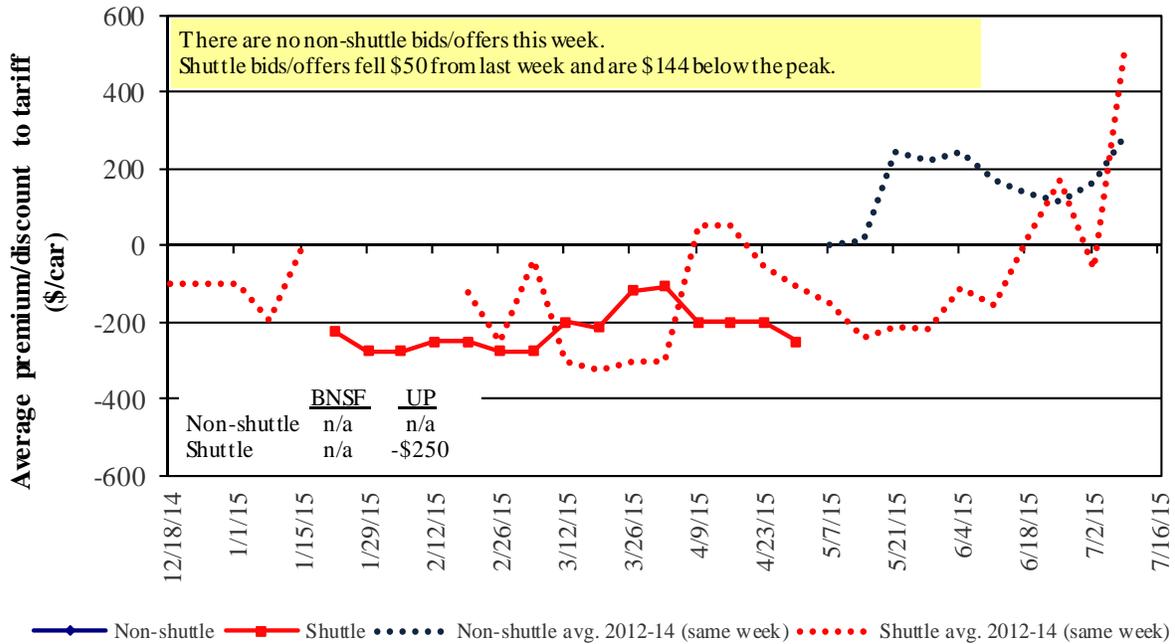


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in July 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					
	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15
<b>Non-shuttle</b>						
BNSF-GF	(100)	n/a	n/a	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	(1,300)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(150)	(163)	n/a	n/a	n/a	n/a
Change from last week	25	-	n/a	n/a	n/a	n/a
Change from same week 2014	(350)	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	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	(500)	n/a
UP-Pool	(200)	(200)	(250)	(250)	(250)	525
Change from last week	100	100	-	-	-	n/a
Change from same week 2014	(250)	(200)	(250)	(450)	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>
5/1/2015	metric ton					bushel <sup>2</sup>		
<b>Unit train</b>								
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$81	\$34.44	\$0.94	2	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$30	\$41.44	\$1.13	12	
	Wichita, KS	Los Angeles, CA	\$6,950	\$153	\$70.54	\$1.92	4	
	Wichita, KS	New Orleans, LA	\$4,026	\$142	\$41.39	\$1.13	0	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	\$126	\$65.66	\$1.79	5	
	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	-3	
	Toledo, OH	Raleigh, NC	\$5,555	\$199	\$57.14	\$1.45	12	
	Des Moines, IA	Davenport, IA	\$2,168	\$34	\$21.87	\$0.56	2	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$150	\$48.76	\$1.24	12	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$96	\$41.71	\$1.06	14	
	Des Moines, IA	Little Rock, AR	\$3,308	\$100	\$33.84	\$0.86	-2	
	Des Moines, IA	Los Angeles, CA	\$4,852	\$292	\$51.08	\$1.30	-13	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,699	\$149	\$38.21	\$1.04	0	
	Toledo, OH	Huntsville, AL	\$4,676	\$141	\$47.84	\$1.30	20	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$201	\$57.85	\$1.57	12	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$96	\$44.33	\$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	\$3,953	\$88	\$40.13	\$1.09	1	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$69	\$39.60	\$1.08	-2	
	Chicago, IL	Albany, NY	\$4,723	\$187	\$48.76	\$1.33	13	
	Grand Forks, ND	Portland, OR	\$5,611	\$152	\$57.23	\$1.56	0	
	Grand Forks, ND	Galveston-Houston, TX	\$6,532	\$158	\$66.44	\$1.81	0	
	Northwest KS	Portland, OR	\$5,260	\$256	\$54.77	\$1.49	-3	
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$185	\$53.28	\$1.35	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,130	\$170	\$52.63	\$1.34	-5	
	Champaign-Urbana, IL	New Orleans, LA	\$3,147	\$161	\$32.85	\$0.83	-3	
	Lincoln, NE	Galveston-Houston, TX	\$3,610	\$99	\$36.83	\$0.94	-5	
	Des Moines, IA	Amarillo, TX	\$3,690	\$126	\$37.89	\$0.96	-2	
	Minneapolis, MN	Tacoma, WA	\$5,180	\$184	\$53.26	\$1.35	-6	
	Council Bluffs, IA	Stockton, CA	\$4,600	\$190	\$47.57	\$1.21	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,690	\$170	\$58.19	\$1.58	-5	
Soybeans	Minneapolis, MN	Portland, OR	\$5,710	\$185	\$58.54	\$1.59	-5	
	Fargo, ND	Tacoma, WA	\$5,580	\$151	\$56.91	\$1.55	-5	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$186	\$45.79	\$1.25	0	
	Toledo, OH	Huntsville, AL	\$3,851	\$141	\$39.65	\$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: 5/1/2015

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change Y/Y <sup>4</sup>	
				surchage per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup> bushel <sup>3</sup>		
Wheat	MT	Chihuahua, CI	\$7,599	\$161	\$79.29	\$2.16	11
	OK	Cuautitlan, EM	\$6,605	\$195	\$69.48	\$1.89	-1
	KS	Guadalajara, JA	\$7,050	\$189	\$73.96	\$2.01	-3
	TX	Salinas Victoria, NL	\$4,014	\$74	\$41.76	\$1.14	2
Corn	IA	Guadalajara, JA	\$8,427	\$222	\$88.37	\$2.24	-2
	SD	Celaya, GJ	\$7,780	\$210	\$81.64	\$2.07	-6
	NE	Queretaro, QA	\$7,618	\$197	\$79.86	\$2.03	-4
	SD	Salinas Victoria, NL	\$6,035	\$160	\$63.30	\$1.61	-5
	MO	Tlalnepantla, EM	\$6,963	\$192	\$73.11	\$1.86	-5
	SD	Torreon, CU	\$7,050	\$176	\$73.83	\$1.87	-2
Soybeans	MO	Bojay (Tula), HG	\$8,365	\$187	\$87.38	\$2.38	0
	NE	Guadalajara, JA	\$8,929	\$214	\$93.42	\$2.54	-1
	IA	El Castillo, JA	\$9,270	\$209	\$96.85	\$2.63	-2
	KS	Torreon, CU	\$7,226	\$133	\$75.19	\$2.04	0
Sorghum	TX	Guadalajara, JA	\$7,150	\$137	\$74.45	\$1.89	-2
	NE	Celaya, GJ	\$7,404	\$191	\$77.60	\$1.97	-4
	KS	Queretaro, QA	\$7,255	\$120	\$75.35	\$1.91	4
	NE	Salinas Victoria, NL	\$5,883	\$141	\$61.54	\$1.56	2
	NE	Torreon, CU	\$6,662	\$157	\$69.67	\$1.77	0

<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

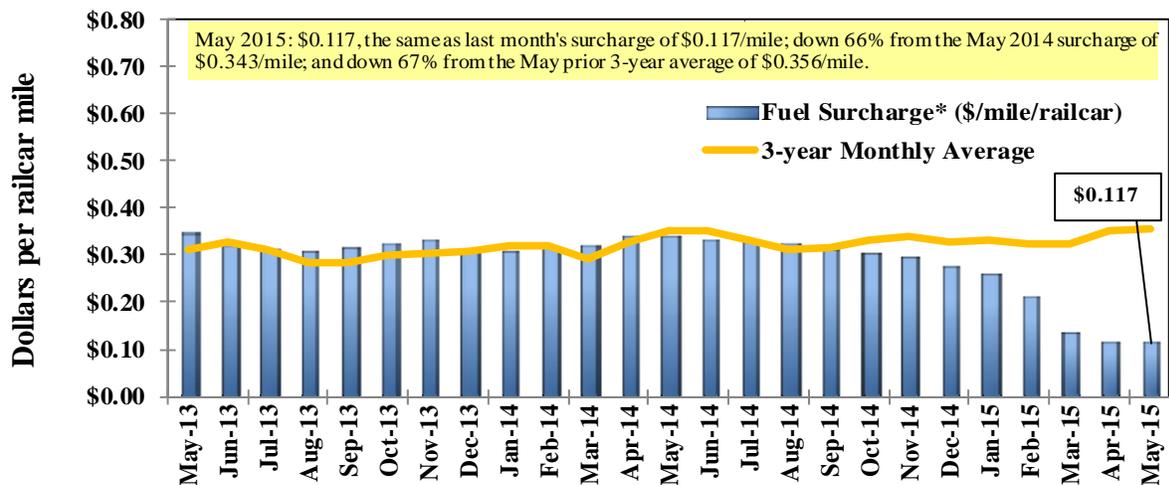
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

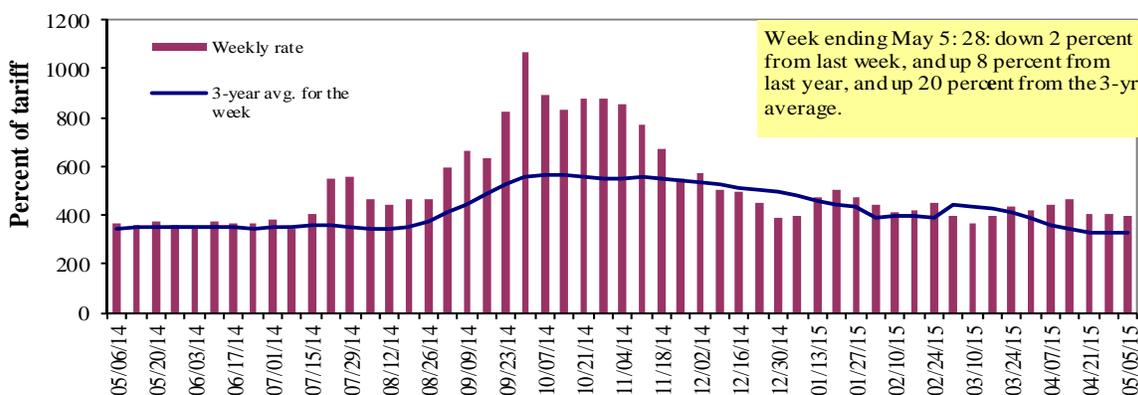
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	5/5/2015	395	385	395	273	273	273	268
	4/28/2015	413	400	405	298	295	295	270
<b>\$/ton</b>	5/5/2015	24.45	20.48	18.33	10.89	12.80	11.03	8.42
	4/28/2015	25.56	21.28	18.79	11.89	13.84	11.92	8.48
<b>Current week % change from the same week:</b>								
	Last year	-13	3	8	12	10	10	32
	3-year avg. <sup>2</sup>	-9	9	20	15	9	9	34
<b>Rate<sup>1</sup></b>	June	385	373	375	268	263	263	245
	August	405	418	425	363	413	413	338

<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:

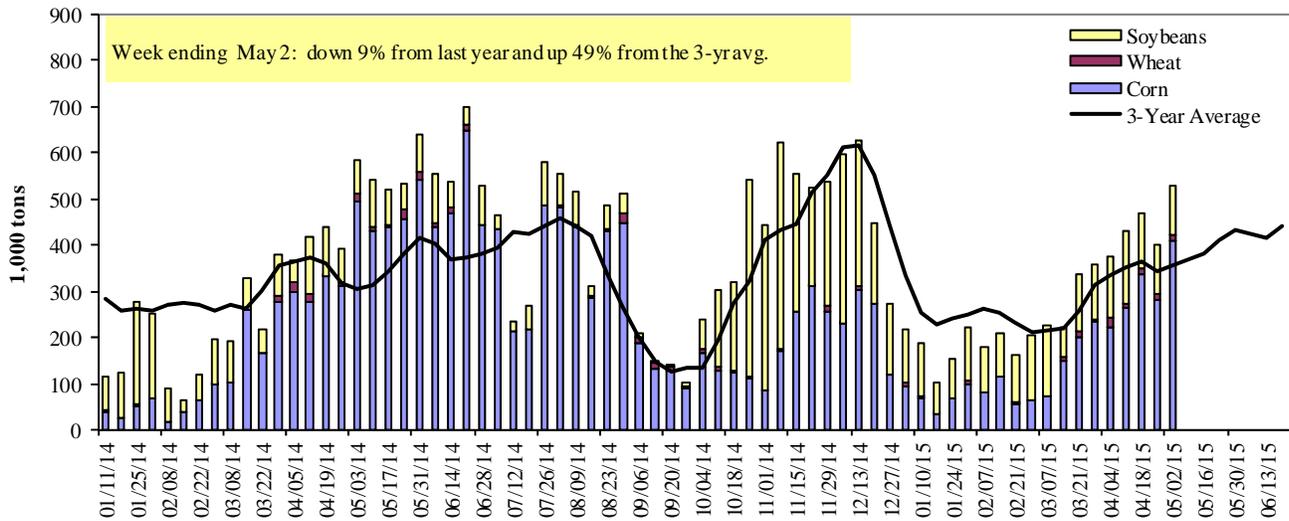
(Rate \* 1976 tariff benchmark rate per ton)/100

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 05/02/2015	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	142	3	82	0	228
Winfield, MO (L25)	302	9	97	5	413
Alton, IL (L26)	412	16	106	5	539
Granite City, IL (L27)	409	13	106	5	533
<b>Illinois River (L8)</b>	95	5	13	0	113
<b>Ohio River (L52)</b>	193	26	56	0	275
<b>Arkansas River (L1)</b>	0	31	11	0	42
Weekly total - 2015	602	70	173	5	850
Weekly total - 2014	631	62	96	0	788
2015 YTD <sup>1</sup>	5,708	505	3,954	87	10,253
2014 YTD	6,500	620	3,617	61	10,798
2015 as % of 2014 YTD	88	81	109	142	95
Last 4 weeks as % of 2014 <sup>2</sup>	96	103	146	182	105
Total 2014	20,693	2,181	11,813	258	34,946

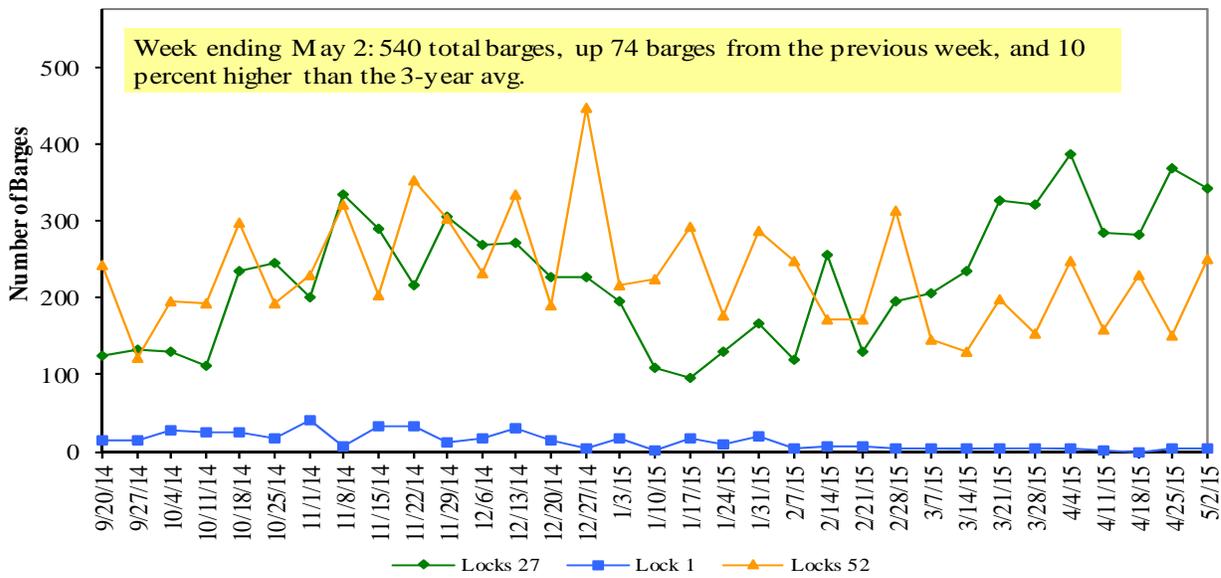
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

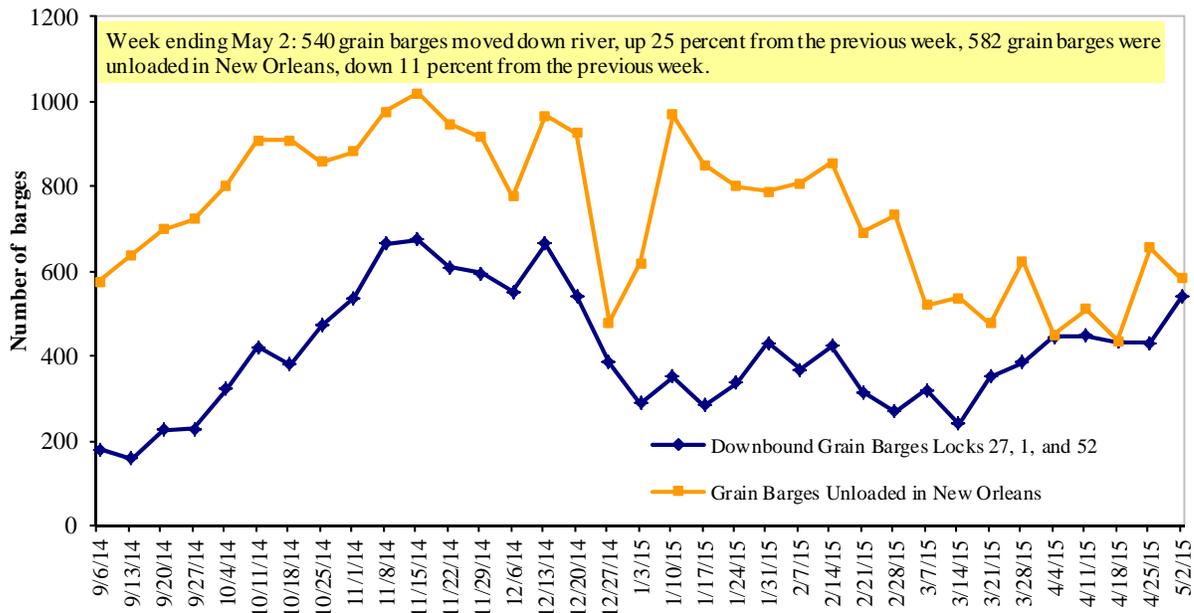
Source: U.S. Army Corps of Engineers

**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 04/27/2014 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.949	0.023	-1.116
	New England	3.057	0.008	-1.151
	Central Atlantic	3.110	0.029	-1.075
	Lower Atlantic	2.806	0.023	-1.143
II	Midwest <sup>2</sup>	2.691	0.032	-1.256
III	Gulf Coast <sup>3</sup>	2.683	0.024	-1.141
IV	Rocky Mountain	2.731	0.018	-1.251
V	West Coast	3.026	0.061	-1.029
	West Coast less California	2.865	0.069	-1.089
	California	3.156	0.054	-0.984
Total	U.S.	2.811	0.031	-1.164

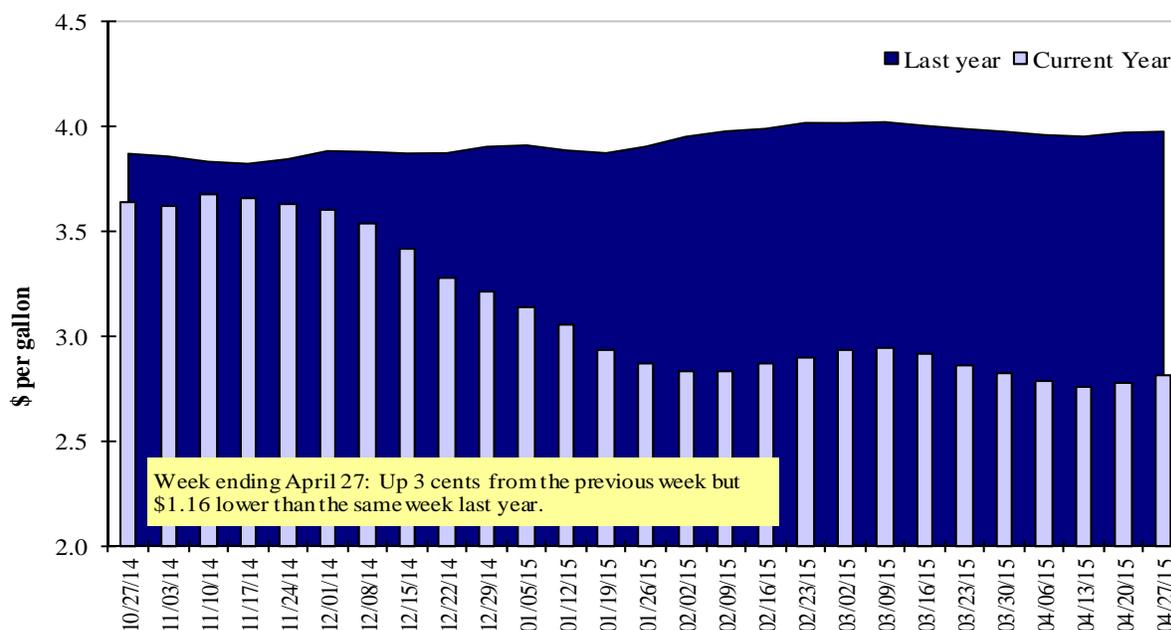
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
4/23/2015	887	420	908	473	58	2,745	13,475	3,668	19,888
This week year ago	1,332	592	1,322	616	138	4,000	16,161	2,604	22,765
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2014/15 YTD	6,458	3,300	6,669	3,447	607	20,481	26,842	45,404	92,727
2013/14 YTD	10,442	6,928	5,666	3,837	398	27,272	27,847	41,989	97,108
YTD 2014/15 as % of 2013/14	62	48	118	90	153	75	96	108	95
Last 4 wks as % of same period 2013/14	88	96	96	99	58	93	86	139	94
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 04/23/2015	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	9,114	9,867	(8)	10,079
Mexico	9,534	9,569	(0.4)	8,145
Korea	2,827	3,267	(13)	2,965
Colombia	3,496	2,643	32	3,461
Taiwan	1,402	1,499	(6)	1,238
<b>Top 5 Importers</b>	<b>26,374</b>	<b>26,845</b>	<b>(2)</b>	<b>25,887</b>
<b>Total US corn export sales</b>	<b>40,317</b>	<b>44,008</b>	<b>(8)</b>	<b>34,445</b>
% of Projected	88%	90%		
Change from prior week	832	938		
<b>Top 5 importers' share of U.S. corn export sales</b>	65%	61%		75%
<b>USDA forecast, April 2015</b>	<b>45,720</b>	<b>48,700</b>	<b>(6)</b>	
<b>Corn Use for Ethanol USDA forecast, April 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 04/23/2015	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	29,896	27,598	8	24,211
Mexico	2,970	2,996	(1)	2,971
Indonesia	1,576	2,063	(24)	1,895
Japan	1,653	1,721	(4)	1,750
Taiwan	1,137	1,101	3	1,055
<b>Top 5 importers</b>	<b>37,232</b>	<b>35,479</b>	<b>5</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>49,072</b>	<b>44,593</b>	<b>10</b>	<b>39,169</b>
% of Projected	101%	99%		
Change from prior week*	433	(17)		
<b>Top 5 importers' share of U.S. soybean export sales</b>	76%	80%		<b>81%</b>
<b>USDA forecast, April 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 04/23/2015	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	3,072	3,054	1	3,243
Mexico	2,718	3,047	(11)	3,066
Nigeria	1,967	2,660	(26)	2,960
Philippines	2,417	2,107	15	2,006
China	440	4,272	(90)	1,830
Brazil	1,534	4,124	(63)	1,617
Korea	1,172	1,310	(11)	1,552
Taiwan	988	1,022	(3)	969
Indonesia	635	1,075	(41)	813
Colombia	575	761	(24)	610
<b>Top 10 importers</b>	<b>15,517</b>	<b>23,431</b>	<b>(34)</b>	<b>18,665</b>
<b>Total US wheat export sales</b>	<b>23,226</b>	<b>31,272</b>	<b>(26)</b>	<b>27,696</b>
% of Projected	97%	98%		
Change from prior week*	(449)	215		
<b>Top 10 importers' share of U.S. wheat export sales</b>	67%	75%		67%
<b>USDA forecast, April 2015</b>	<b>23,950</b>	<b>32,010</b>	<b>(25)</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 04/30/15	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	165	345	48	4,053	4,198	97	74	74	12,436
Corn	170	227	75	3,458	2,388	145	95	162	7,781
Soybeans	0	0	n/a	4,034	4,463	90	88	112	12,887
<b>Total</b>	<b>335</b>	<b>572</b>	<b>59</b>	<b>11,545</b>	<b>11,049</b>	<b>104</b>	<b>84</b>	<b>102</b>	<b>33,104</b>
<b>Mississippi Gulf</b>									
Wheat	85	0	n/a	1,327	1,548	86	45	46	4,495
Corn	720	845	85	9,489	11,045	86	73	130	30,912
Soybeans	105	244	43	9,285	9,406	99	106	120	29,087
<b>Total</b>	<b>911</b>	<b>1,089</b>	<b>84</b>	<b>20,101</b>	<b>21,999</b>	<b>91</b>	<b>74</b>	<b>114</b>	<b>64,495</b>
<b>Texas Gulf</b>									
Wheat	32	139	23	1,324	2,174	61	73	79	6,120
Corn	0	29	0	204	215	95	41	60	580
Soybeans	0	0	n/a	182	254	72	n/a	0	949
<b>Total</b>	<b>32</b>	<b>168</b>	<b>19</b>	<b>1,710</b>	<b>2,643</b>	<b>65</b>	<b>70</b>	<b>77</b>	<b>7,649</b>
<b>Interior</b>									
Wheat	15	34	44	459	413	111	65	131	1,400
Corn	126	165	77	1,909	1,758	109	75	102	5,677
Soybeans	51	68	75	1,297	1,593	81	79	83	4,312
<b>Total</b>	<b>192</b>	<b>267</b>	<b>72</b>	<b>3,665</b>	<b>3,763</b>	<b>97</b>	<b>99</b>	<b>99</b>	<b>11,389</b>
<b>Great Lakes</b>									
Wheat	45	18	252	96	26	375	329	105	935
Corn	0	50	0	75	0	n/a	n/a	594	288
Soybeans	11	0	n/a	18	26	68	65	111	988
<b>Total</b>	<b>56</b>	<b>68</b>	<b>82</b>	<b>188</b>	<b>52</b>	<b>365</b>	<b>342</b>	<b>163</b>	<b>2,211</b>
<b>Atlantic</b>									
Wheat	1	17	5	215	53	406	906	265	553
Corn	5	16	29	44	207	21	12	42	816
Soybeans	16	12	140	816	955	85	106	143	2,119
<b>Total</b>	<b>22</b>	<b>45</b>	<b>49</b>	<b>1,075</b>	<b>1,215</b>	<b>89</b>	<b>65</b>	<b>130</b>	<b>3,487</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	343	553	62	7,474	8,411	89	75	75	25,939
Corn	1,021	1,333	77	15,178	15,612	97	79	131	46,054
Soybeans	184	323	57	15,632	16,697	94	93	109	50,342
<b>Total</b>	<b>1,548</b>	<b>2,209</b>	<b>70</b>	<b>38,284</b>	<b>40,720</b>	<b>94</b>	<b>80</b>	<b>106</b>	<b>122,335</b>

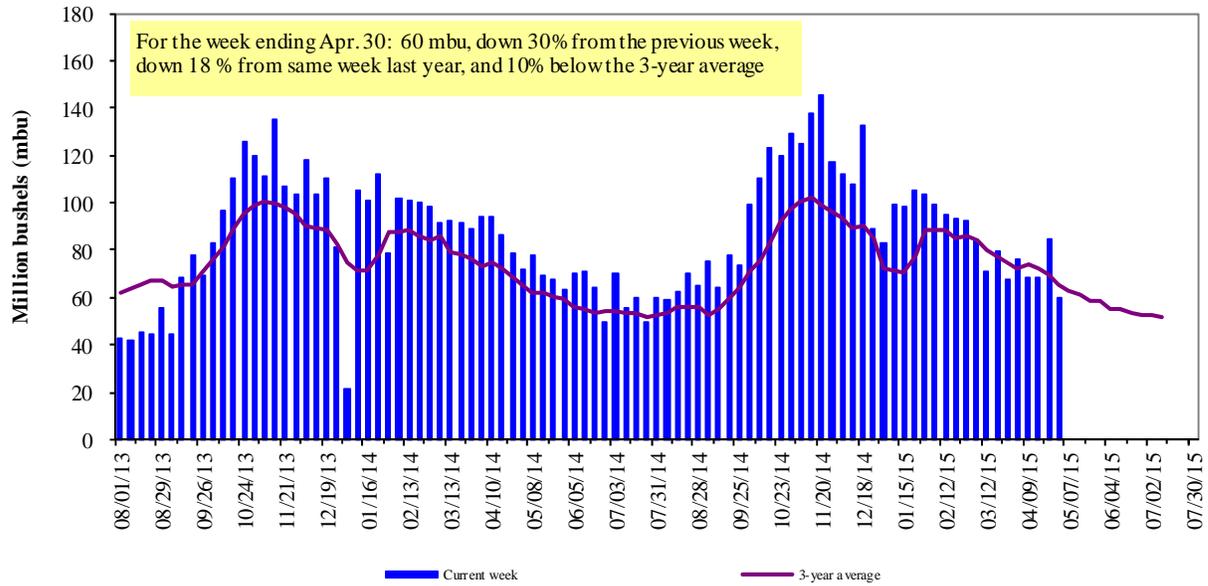
<sup>1</sup> Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)**

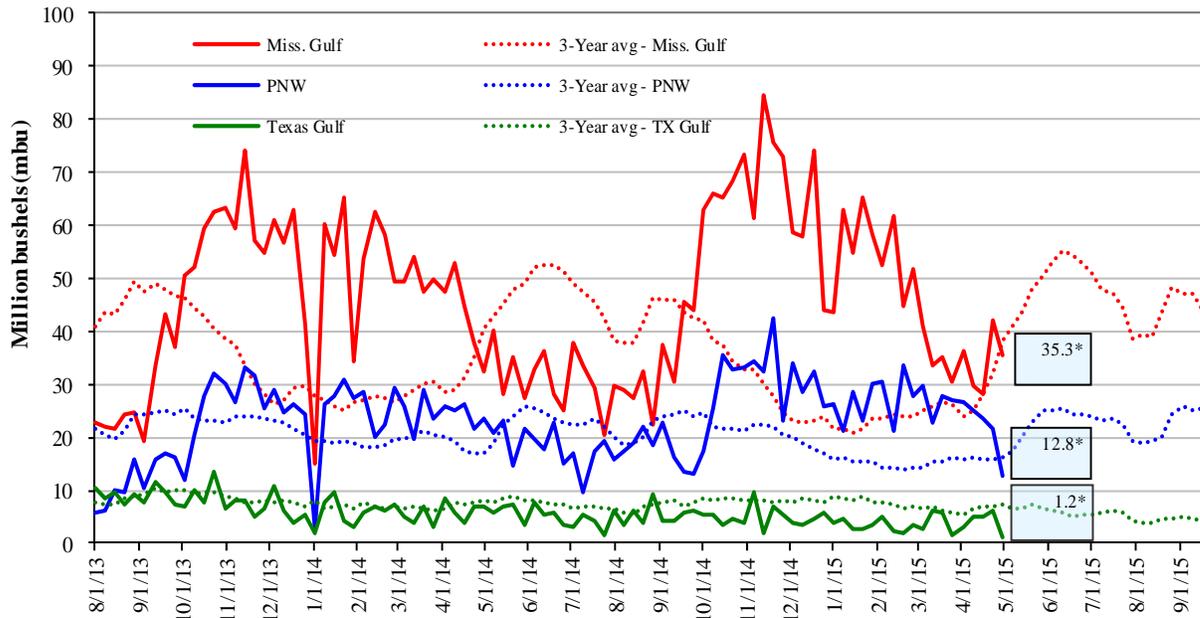


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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. 30: % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 16	down 81	down 25	down 41
Last year (same week)	up 10	down 84	down 7	down 46
3-yr avg. (4-wk mov. avg.)	up 20	down 79	up 4	up 31

# Ocean Transportation

Table 17

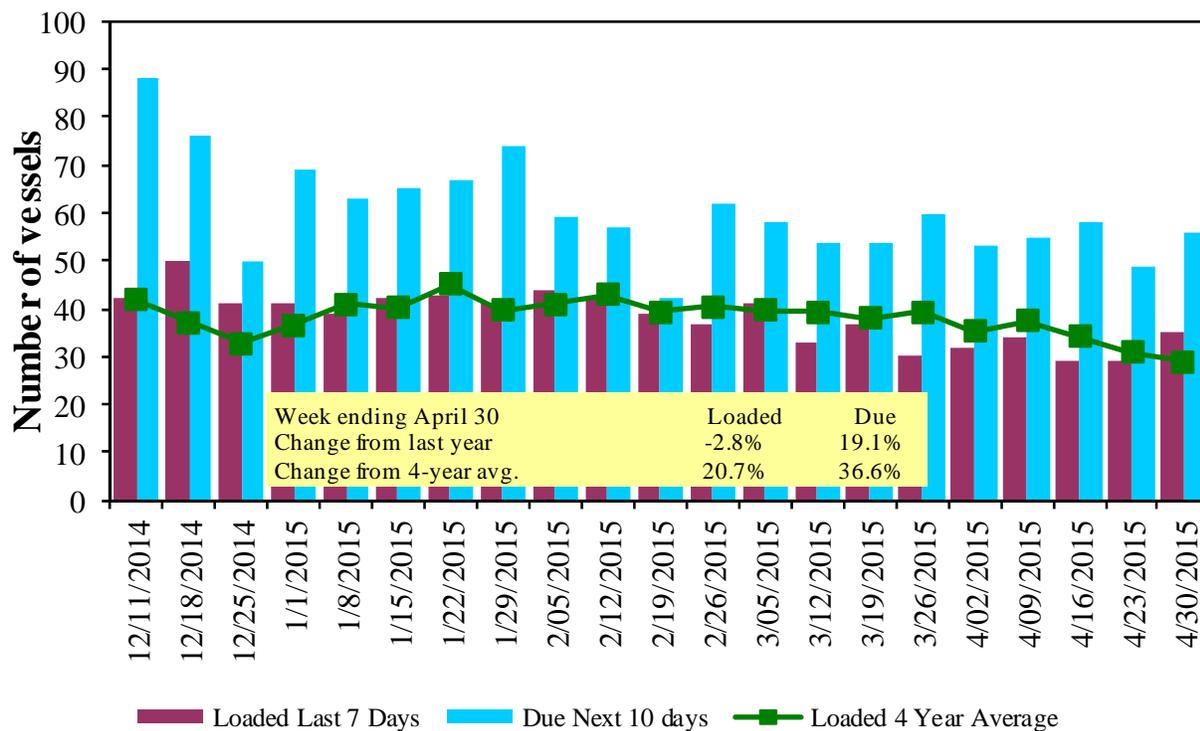
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/30/2015	52	35	56	3	n/a
4/23/2015	48	29	49	7	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**

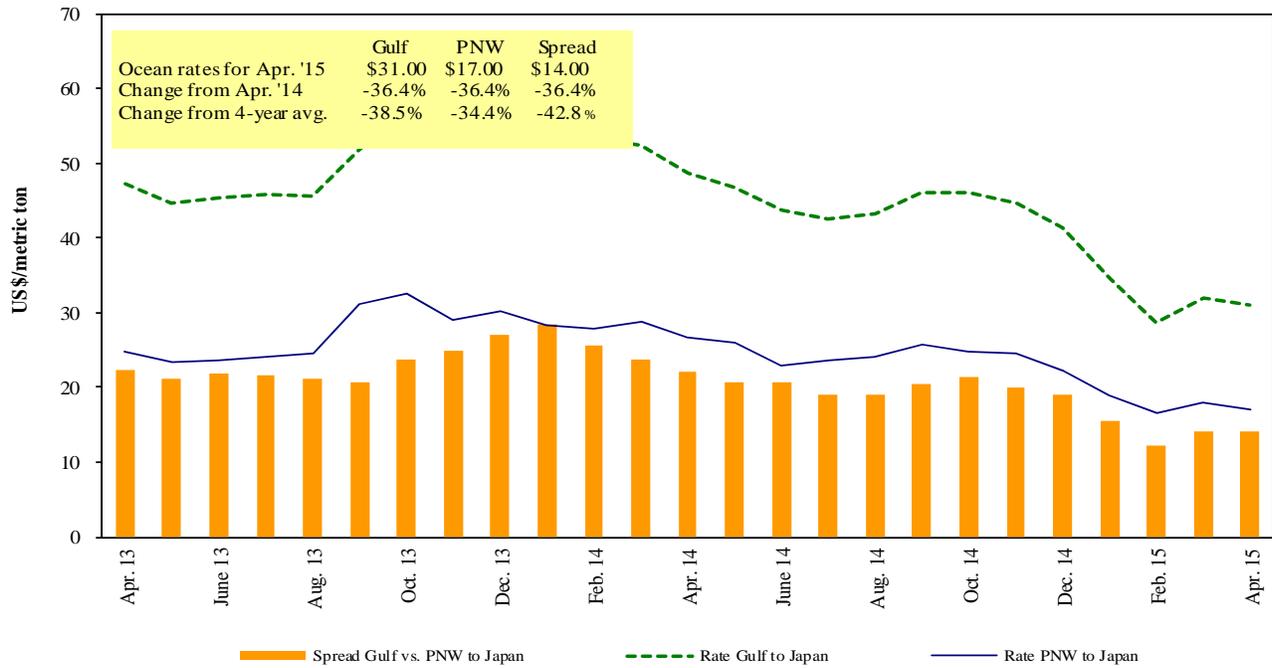


Source: Transportation & Marketing Programs/AMS/USDA

<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 5/2/2015**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
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	Heavy Grain	Jun 1/10	60,000	14.00
PNW	China	Grain	Mar 16/25	60,000	15.25
Brazil	China	Heavy Grain	May 25/Jun 5	60,000	23.00
Brazil	China	Heavy Grain	May 20/30	60,000	22.75
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 6/14	60,000	22.60
Brazil	China	Heavy Grain	May 15/10	60,000	22.75
Brazil	China	Grain	May 1/10	60,000	22.50
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 21/30	60,000	30.00
Canada	China	Heavy Grain	Jun 1/10	60,000	14.00
France	China	Barley	Apr 16/25	63,000	26.00
Germany	Iran	Wheat	May 10/15	60,000	24.75

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

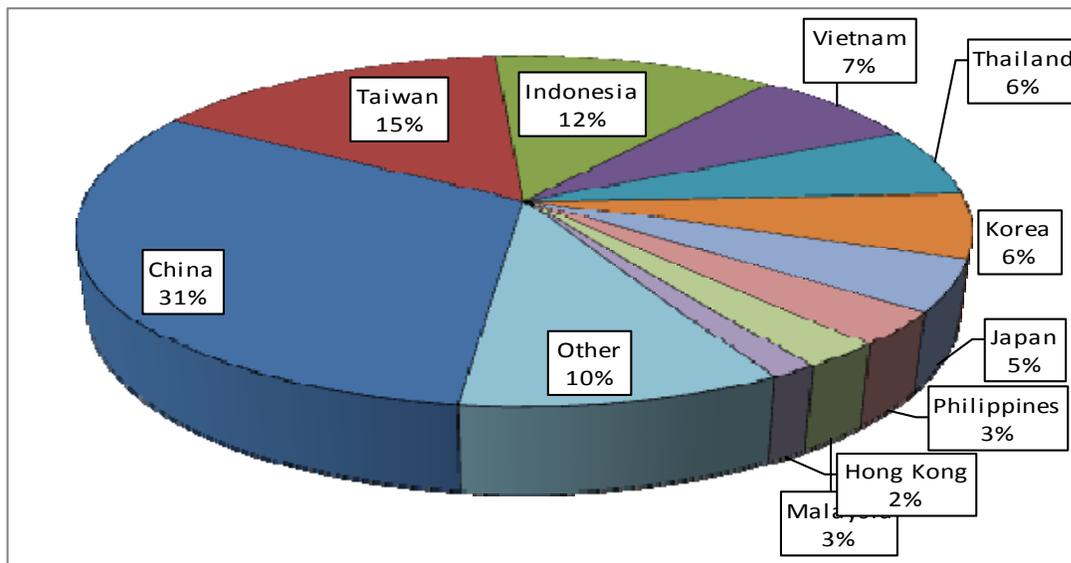
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-December 2014**

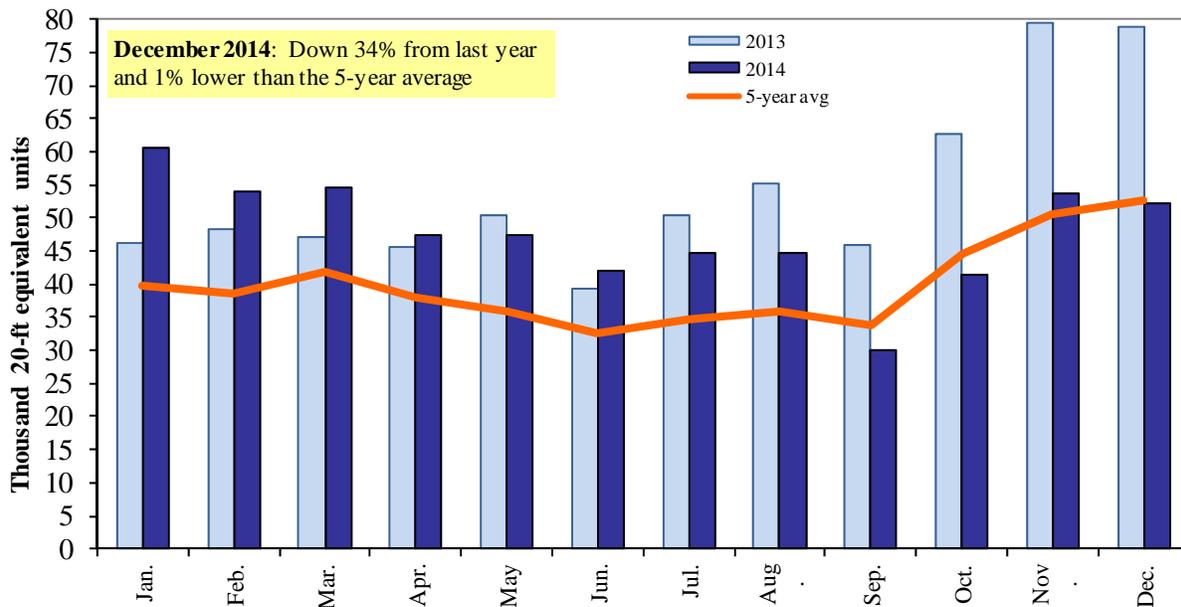


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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