



# 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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April 25, 2019

## WEEKLY HIGHLIGHTS

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#### Wheat Drives Increase in Total Grain Inspections

For the week ending April 18, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.59 million metric tons (mmt). This denotes a 16 percent increase from the previous week, an 11 percent decrease from last year, and an 8 percent increase from the 3-year average. A 53 percent jump in wheat inspections drove the increase in total inspections. Weekly wheat inspections, destined primarily to Latin America and Africa, were the highest since late September 2016. Corn inspections increased 14 percent from week-to-week, but soybean inspections dropped 20 percent. Pacific Northwest (PNW) grain inspections increased 11 percent from the previous week while inspections in the Mississippi Gulf increased 9 percent.

#### Flooding Continues to Impact River Traffic

Much of the Mississippi River remains impacted by this year's on-going flooding. According to the U.S. Army Corps of Engineers, river levels are receding in some areas, however, recent precipitation may prevent water levels from receding further. Forecasts indicate the second snow melt of the season may have less impact than the first. While a fluctuating number of locks are closed on the Upper Mississippi River, barge traffic is stopped between Locks 22 and 24 due to highwater preventing barge passage under a bridge near Louisiana, MO. Industry sources report the Louisiana Bridge may be open for a few days later in April, but will likely close again in May due to more rain being forecasted. Barge traffic is restricted to daylight only through St. Louis Harbor and at bridges in Vicksburg, MS, and Baton Rouge, LA. There are tow size restrictions throughout the system.

#### Diesel Fuel Prices Rise for Third Consecutive Week

For the week ending April 22, the average diesel fuel price in the U.S. increased to \$3.147 per gallon, 2.9 cents above the previous week's average and 1.4 cents above the same week last year. Prices have increased nearly 7 cents per gallon over the past 3 weeks. A similar increase in crude oil prices is putting pressure on diesel fuel prices. The [Energy Information Administration](#) expects demand for diesel fuel this summer to be strong again this year, due to continued economic growth, industrial output, international trade activity, and oil and natural gas drilling activity. All of these factors contribute to more trucking activity.

### Snapshots by Sector

#### Export Sales

For the week ending April 11, **unshipped balances** of wheat, corn, and soybeans totaled 31 mmt. This indicates a 15 percent decrease in outstanding sales, compared to the same time last year. Net weekly **wheat export sales** were .318 mmt, up 16 percent from the previous week. Net **corn export sales** totaled .948 mmt, up 73 percent from the previous week. Net **soybean export sales** totaled .382 mmt, up 41 percent from the past week.

#### Rail

U.S. Class I railroads originated 21,639 **grain carloads** for the week ending April 13. This is down 1 percent from the previous week, 4 percent lower than last year, and unchanged from the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were \$125 below tariff for the week ending April 18. This is down \$154 from last week and \$817 below last year. Average non-shuttle secondary railcar bids/offers were \$650 above tariff, up \$313 from last week. There were no non-shuttle bids/offers this week last year.

#### Barge

For the week ending April 13, **barge grain movements** totaled 428,581 tons. This is 15 percent lower than the previous week and 31 percent lower than the same period last year.

For the week ending April 13, 265 grain barges **moved down river**. This is 65 less barges than the previous week. There were 524 grain barges **unloaded in New Orleans**, 12 percent higher than the previous week.

#### Ocean

For the week ending April 18, 32 **ocean-going grain vessels** were loaded in the Gulf. This ~~was~~ is 14 percent less than the same period last year. Fifty-four vessels are expected to be loaded within the next 10 days. This is 8 percent more than the same period last year.

As of April 18, 2019, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$42.00, unchanged from the previous week. The rate for the Pacific Northwest to Japan was \$23.00 per mt. This is 2 percent lower than the previous week.

# Feature Article/Calendar

## Bulk Ocean Freight Rates Remain Relatively Low

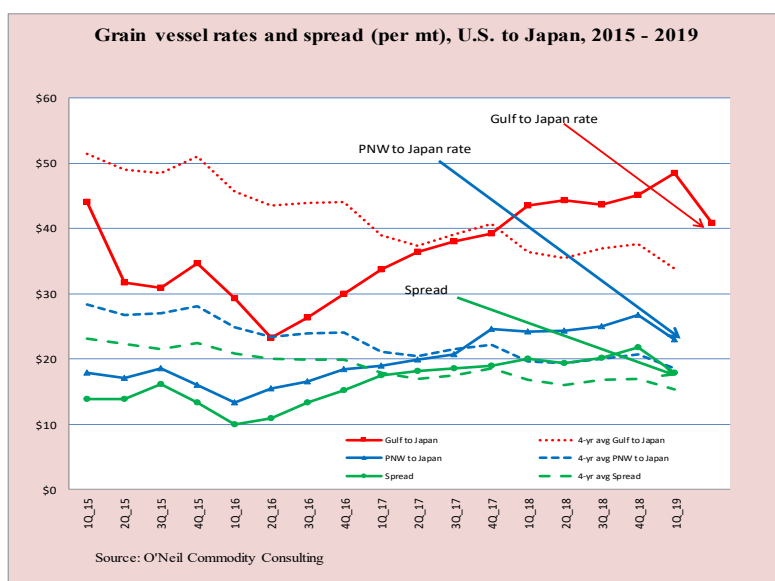
During the first quarter of 2019, ocean freight rates for shipping bulk commodities, including grains, remained relatively low compared to the previous quarter and the same time last year. However, the rates are higher than the 4-year average. The rates from the U.S. Gulf to Japan averaged \$40.86 per metric ton (mt) during the quarter. This represents a 16 percent decrease from the previous quarter, an 8 percent decrease from a year ago, and is 24 percent higher than the 4-year average. The Pacific Northwest (PNW) to Japan rates averaged \$22.98 per mt, 14 percent below the previous quarter, 5 percent below the same time last year, and 26 percent above the 4-year average. It cost \$16.73 to ship a metric ton of grain from the U.S. Gulf to Rotterdam during the first quarter. This indicates a 20 percent decrease from the previous quarter, a 1 percent decrease from last year, and is 17 percent higher than the 4-year average.

Ocean freight rates for grain routes during the first quarter 2019							
Route	Jan.	Feb.	Mar.	1st quarter 2019	Change from		
					4th qtr '18	1st qtr '18	4-yr avg
--\$/mt--				--\$/mt--	Percent		
U.S. Gulf to Japan	43.00	38.94	40.63	40.86	-16	-8	24
PNW to Japan	23.50	22.13	23.31	22.98	-14	-5	26
Spread*	19.50	16.81	17.32	17.88	-18	-11	21
U.S. Gulf to Europe	18.25	16.06	15.88	16.73	-20	-1	17

Source: O'Neil Commodity Consulting  
 \*Spread is the difference between ocean freight rates for shipping grain from the U.S. Gulf to Japan and PNW to Japan

The year began with declining rates, as the Baltic Panamax Index, which tracks the cost of shipping bulk items in a Panamax vessel, fell to 574 points. There was a slowdown in trade activity due to New Year holidays around the world. Coal trade also slowed down because coal inventories at Chinese ports were high. According to Drewry Maritime Research (Drewry), Chinese customs officials delayed clearance for coal shipments in November and December 2018. This led to a buildup of inventories at the Chinese ports, thereby slowing coal imports.

Ocean freight rates continued to fall during February as the collapsed dam and consequent closure of mines in Brazil disrupted the supply of iron ore. The disruption of iron ore supplies further reduced the employment of Panamax vessels. According to Drewry, manufacturing contracted in China for the second consecutive month in January. The Purchasing Manager Index fell below 50, in December 2018 and January 2019. An outbreak of swine fever in China also affected feed consumption and, consequently, the demand for soybeans. China's pork production fell by 0.9 percent in 2018.



In addition, the Chinese New Year celebration kicked in from February 5 to 19, slowing overall trade and manufacturing activities in China.

Ocean freight rates increased slightly in March, as the market was still feeling the effects of low iron ore supply from Australia and Brazil. In addition to mine closures in Brazil, severe cyclone halted operations in some major iron ore exporting ports in Australia. At the same time, Australian coal shippers were still experiencing delays in receiving customs clearance in China. These combined effects have slowed down the rate increase.

### **Current Market Situation and Outlook**

As of April 18, 2019, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$42. The rate for the Pacific Northwest to Japan was \$23 per mt. The U.S. Gulf and PNW rates were 11 and 8 percent lower than the beginning of the year, and 5 and 4 percent below the same period a year ago, respectively. It may take a while before the market experiences a significant increase in ocean freight rates. The market is still reeling from the effects of mine closures in Brazil and the reduced exports of iron ore from Australia from the cyclone, which are both impacting iron ore supply. Coal imports in China and other northern hemisphere countries are generally low during April because of the off-peak consumption season. According to Drewry, China plans to reduce its coal imports in 2019 by 10 million tons, which will affect the demand for Panamax vessels. However, there may be a temporary increase in the demand for coal during the month of May. The potential increase is due to the onset of peak summer season in China, driven by electricity consumption for cooling.

The International Maritime Organization's mandate to reduce sulfur emissions from ocean-going vessels, as of January 1, 2020, could impact both newly-built vessels and vessel demolition activities (see [October 25, 2018](#) and [February 14, 2019](#) GTR). Until the full impact of the new standard is realized, vessel owners will likely be cautious moving forward with newly-built vessels, as they weigh the options of using emission scrubbers or ultra-low sulfur fuel. Demolition activities could increase as well, as vessel owners prepare and balance the fleet under the new standard. The onset of summer peak season in China, slow addition of newbuilding and increased demolition of older vessels may put an upward pressure on ocean freight rates.

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# Grain Transportation Indicators

Table 1

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

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/24/19	211	316	225	210	188	163
04/17/19	209	313	230	211	188	167

<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 Program/AMS/USDA

Table 2

**Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)**

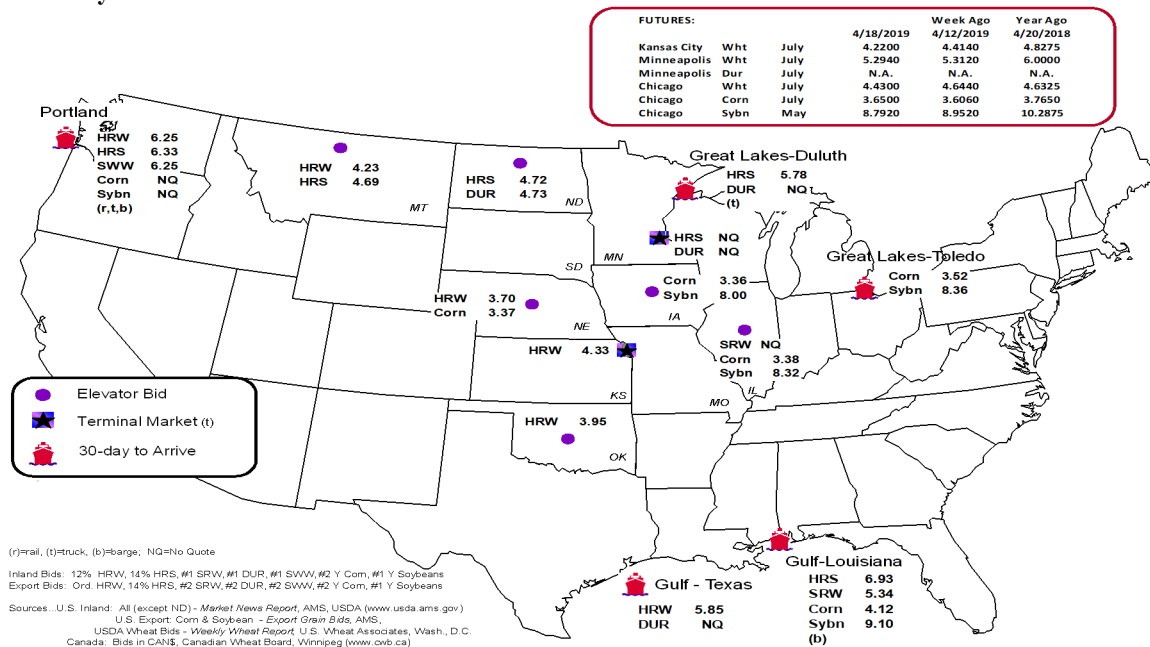
Commodity	Origin--Destination	4/18/2019	4/12/2019
Corn	IL--Gulf	-0.74	-0.74
Corn	NE--Gulf	-0.75	-0.76
Soybean	IA--Gulf	-1.10	-1.06
HRW	KS--Gulf	-1.52	-1.62
HRS	ND--Portland	-1.61	-1.95

Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Program/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1  
**Grain Bid Summary**



# Rail Transportation

Table 3

## Rail Deliveries to Port (carloads)<sup>1</sup>

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
4/17/2019 <sup>p</sup>	1,028	1,601	6,007	421	9,057	4/13/2019	2,059
4/10/2019 <sup>r</sup>	1,070	1,476	6,785	330	9,661	4/6/2019	1,999
2019 YTD <sup>f</sup>	12,940	18,419	90,092	5,934	127,385	2019 YTD	33,198
2018 YTD <sup>f</sup>	6,415	25,139	102,687	5,933	140,174	2018 YTD	28,847
2019 YTD as % of 2018 YTD	202	73	88	100	91	% change YTD	115
Last 4 weeks as % of 2018 <sup>2</sup>	573	99	97	56	105	Last 4wks % 2018	98
Last 4 weeks as % of 4-year avg. <sup>2</sup>	494	91	111	84	117	Last 4wks % 4 yr	94
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,116
Total 2017	28,796	75,543	287,267	21,312	412,918	Total 2017	119,661

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

<sup>2</sup> Compared with same 4-weeks in 2018 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 Grupo Mexico.

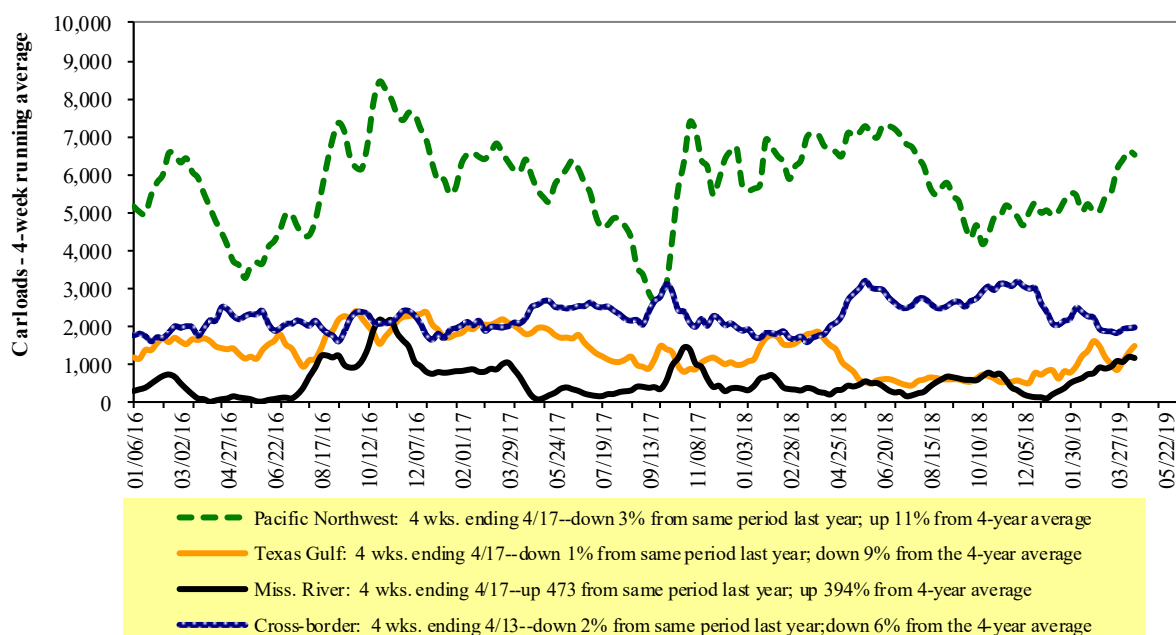
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Program/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail Deliveries to Port



Source: Transportation & Marketing Program/AMS/USDA

Table 4

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

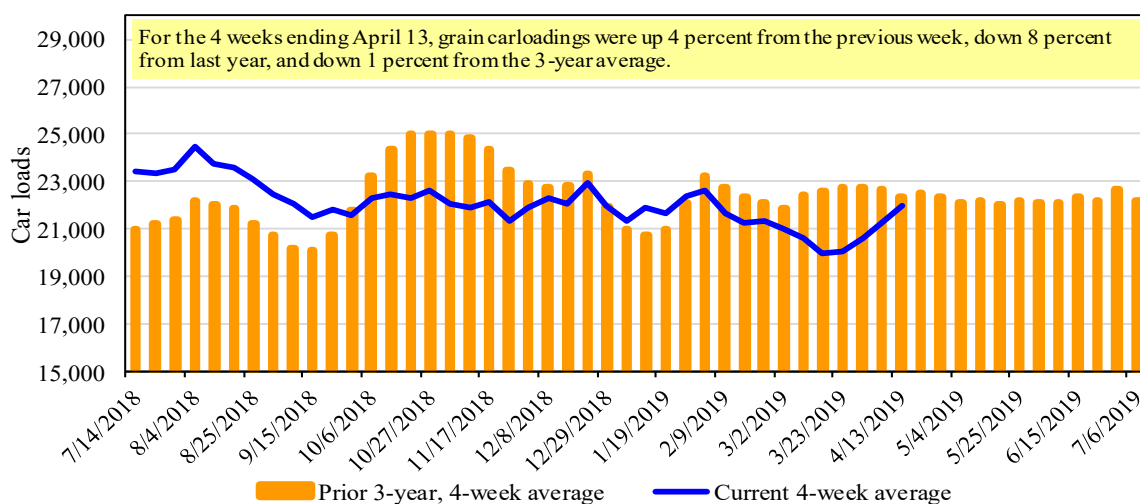
For the week ending: 4/13/2019	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,490	2,879	10,019	1,227	6,024	21,639	6,126	5,318
This week last year	2,100	2,791	12,234	761	4,760	22,646	3,939	5,199
2019 YTD	29,704	40,389	157,620	17,308	75,942	320,963	63,680	62,713
2018 YTD	28,060	36,391	181,961	13,798	78,081	338,291	53,698	65,521
2019 YTD as % of 2018 YTD	106	111	87	125	97	95	119	96
Last 4 weeks as % of 2018*	109	118	79	146	97	92	124	104
Last 4 weeks as % of 3-yr avg.**	123	107	91	151	95	99	129	107
Total 2018	98,978	133,174	635,458	48,638	267,713	1,183,961	211,839	244,697

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

\*\*The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3

**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

**Railcar Auction Offerings<sup>1</sup> (\$/car)<sup>2</sup>**

For the week ending: 4/18/2019		Delivery period							
		May-19	May-18	Jun-19	Jun-18	Jul-19	Jul-18	Aug-19	Aug-18
BNSF <sup>3</sup>	COT grain units	no offer	no bids	23	0	1	0	48	0
	COT grain single-car <sup>5</sup>	no offer	3	422	0	295	0	245	0
UP <sup>4</sup>	GCAS/Region 1	no offer	no offer	no offer	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	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.

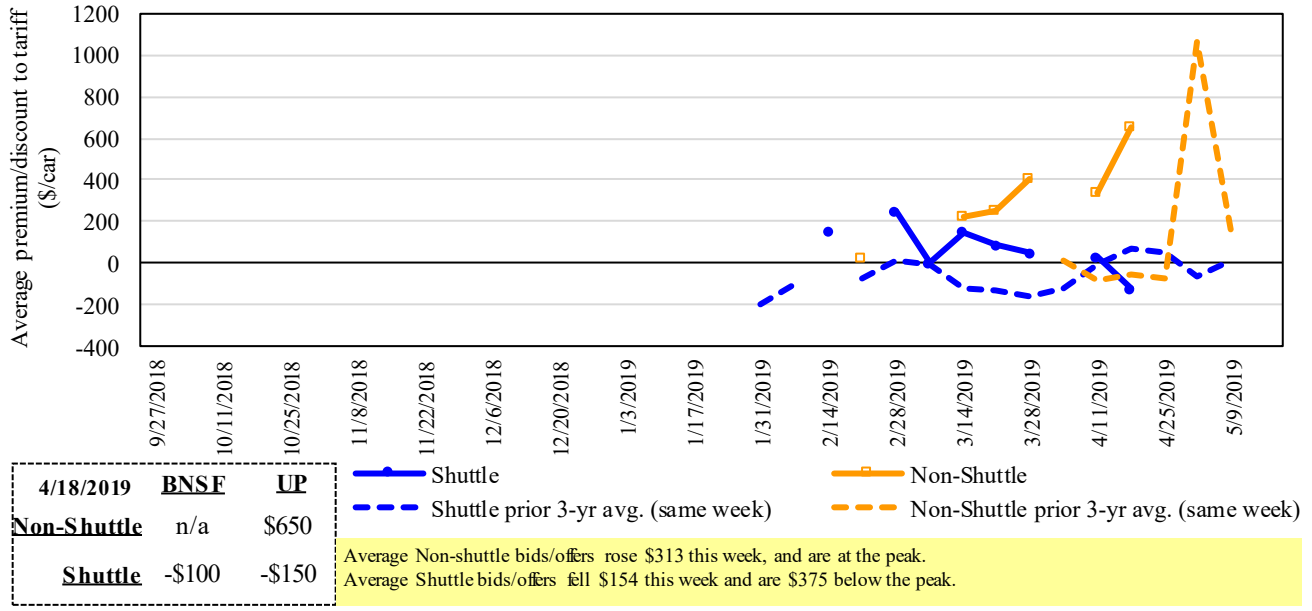
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Program/AMS/USDA.

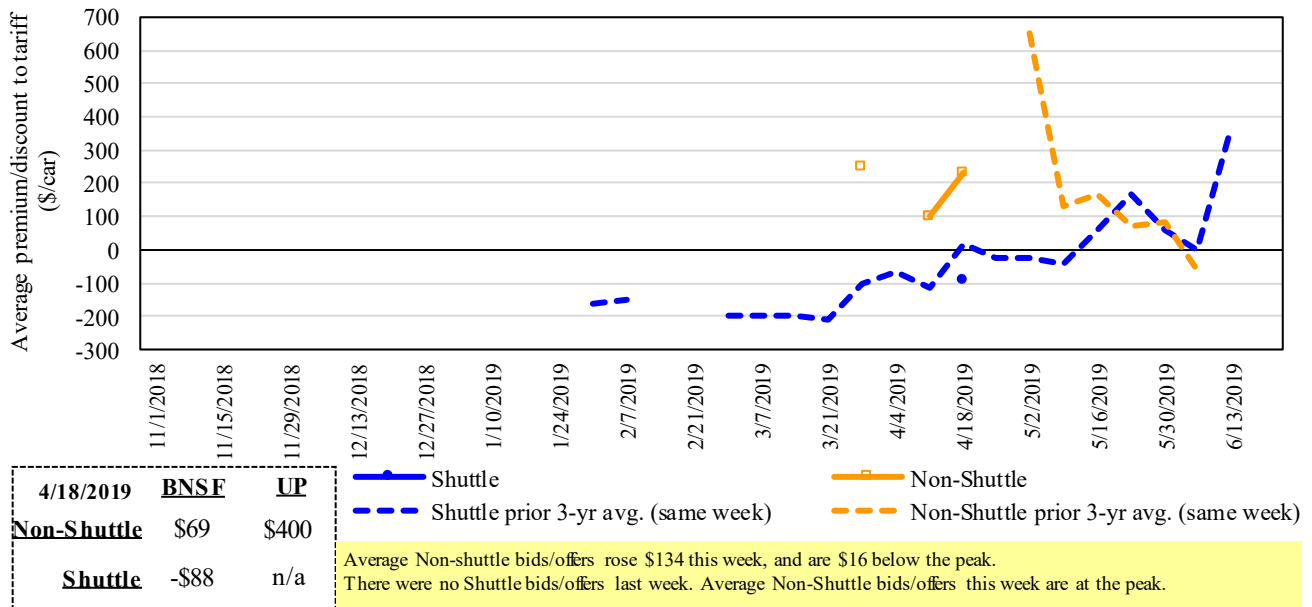
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

**Figure 4**  
**Bids/Offers for Railcars to be Delivered in May 2019, Secondary Market**



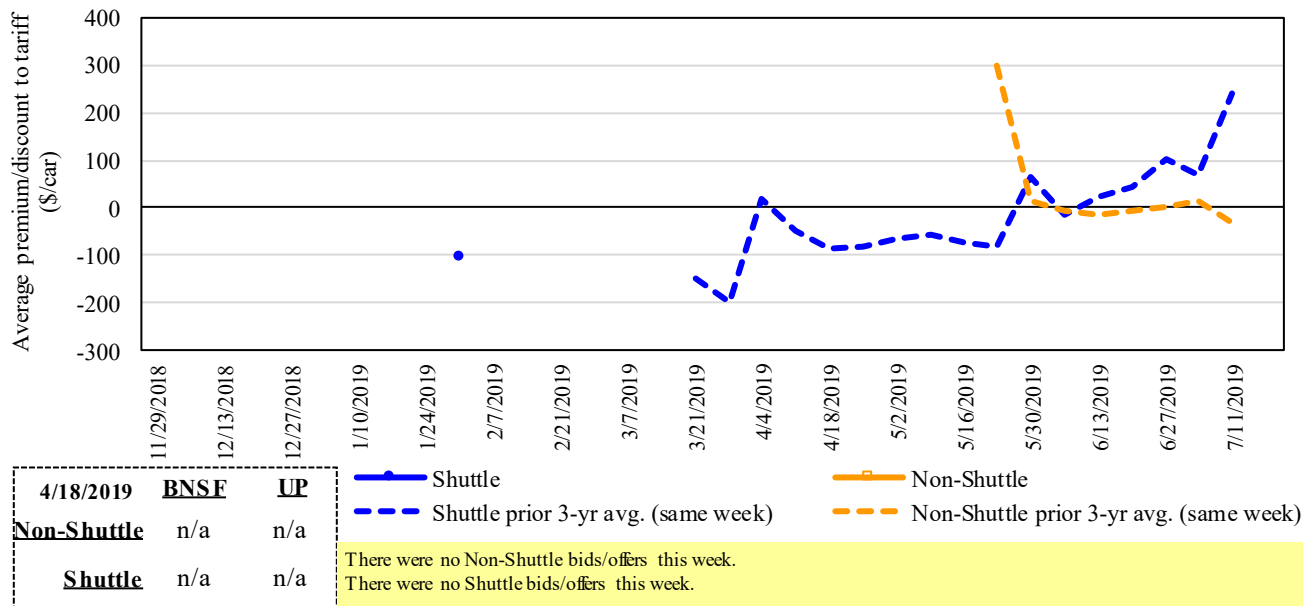
Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
 Source: Transportation & Marketing Program/AMS/USDA

**Figure 5**  
**Bids/Offers for Railcars to be Delivered in June 2019, Secondary Market**



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

**Figure 6**  
**Bids/Offers for Railcars to be Delivered in July 2019, Secondary Market**



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

Table 6  
**Weekly Secondary Railcar Market (\$/car)<sup>1</sup>**

For the week ending:		Delivery period					
		May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19
<b>Non-shuttle</b>	<b>BNSF-GF</b>	n/a	<b>69</b>	n/a	n/a	n/a	n/a
	Change from last week	n/a	(31)	n/a	n/a	n/a	n/a
	Change from same week 2018	n/a	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	<b>650</b>	<b>400</b>	n/a	n/a	n/a	n/a
	Change from last week	100	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	n/a	n/a	n/a	n/a	n/a	n/a
<b>Shuttle</b>	<b>BNSF-GF</b>	<b>(100)</b>	<b>(88)</b>	n/a	n/a	n/a	n/a
	Change from last week	(125)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(1300)	(988)	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	<b>(150)</b>	n/a	n/a	n/a	n/a	n/a
	Change from last week	(183)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(333)	n/a	n/a	n/a	n/a	n/a

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

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: Transportation and Marketing Program/AMS/USDA



The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

**Tariff Rail Rates for Unit and Shuttle Train Shipments<sup>1</sup>**

April, 2019	Origin region <sup>3</sup>	Destination region <sup>3</sup>	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel <sup>2</sup>	Percent change Y/Y <sup>4</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$91	\$40.46	\$1.10	2
	Grand Forks, ND	Duluth-Superior, MN	\$4,268	\$0	\$42.38	\$1.15	3
	Wichita, KS	Los Angeles, CA	\$7,175	\$0	\$71.25	\$1.94	2
	Wichita, KS	New Orleans, LA	\$4,540	\$160	\$46.68	\$1.27	0
	Sioux Falls, SD	Galveston-Houston, TX	\$6,911	\$0	\$68.63	\$1.87	2
	Northwest KS	Galveston-Houston, TX	\$4,816	\$176	\$49.57	\$1.35	0
	Amarillo, TX	Los Angeles, CA	\$5,121	\$244	\$53.28	\$1.45	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$181	\$41.52	\$1.05	1
	Toledo, OH	Raleigh, NC	\$6,581	\$0	\$65.35	\$1.66	4
	Des Moines, IA	Davenport, IA	\$2,258	\$38	\$22.80	\$0.58	0
	Indianapolis, IN	Atlanta, GA	\$5,646	\$0	\$56.07	\$1.42	4
	Indianapolis, IN	Knoxville, TN	\$4,704	\$0	\$46.71	\$1.19	4
	Des Moines, IA	Little Rock, AR	\$3,609	\$113	\$36.96	\$0.94	0
	Des Moines, IA	Los Angeles, CA	\$5,327	\$328	\$56.16	\$1.43	0
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$179	\$42.80	\$1.16	0
	Toledo, OH	Huntsville, AL	\$5,459	\$0	\$54.21	\$1.48	3
	Indianapolis, IN	Raleigh, NC	\$6,698	\$0	\$66.51	\$1.81	4
	Indianapolis, IN	Huntsville, AL	\$4,937	\$0	\$49.03	\$1.33	4
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$181	\$48.92	\$1.33	0
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$4,078	\$0	\$40.50	\$1.10	3
	Wichita, KS	Galveston-Houston, TX	\$4,296	\$0	\$42.66	\$1.16	3
	Chicago, IL	Albany, NY	\$5,896	\$0	\$58.55	\$1.59	4
	Grand Forks, ND	Portland, OR	\$5,736	\$0	\$56.96	\$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,056	\$0	\$60.14	\$1.64	2
	Northwest KS	Portland, OR	\$5,912	\$288	\$61.57	\$1.68	1
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	4
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,800	\$181	\$39.53	\$1.00	2
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	5
	Des Moines, IA	Amarillo, TX	\$4,060	\$142	\$41.72	\$1.06	2
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	4
	Council Bluffs, IA	Stockton, CA	\$5,000	\$0	\$49.65	\$1.26	4
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	3
	Minneapolis, MN	Portland, OR	\$5,800	\$0	\$57.60	\$1.57	3
	Fargo, ND	Tacoma, WA	\$5,650	\$0	\$56.11	\$1.53	3
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$209	\$49.49	\$1.35	0
	Toledo, OH	Huntsville, AL	\$4,634	\$0	\$46.02	\$1.25	6
	Grand Island, NE	Portland, OR	\$5,710	\$295	\$59.63	\$1.62	0

<sup>1</sup>A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

<sup>2</sup>Approximate load per car = 111 short tons (100.7 metric tons): corn 56 lbs./bu., wheat and soybeans 60 lbs./bu.

<sup>3</sup>Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cn.ca, www.csx.com, www.up.com

Table 8

**Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico**

Date: April, 2019			Fuel				Percent
Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel surcharge per car <sup>2</sup>	Tariff plus surcharge per:		change <sup>4</sup> Y/Y
					metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$7,284	\$0	\$74.43	\$2.02	-2
	OK	Cuautitlan, EM	\$6,743	\$125	\$70.18	\$1.91	2
	KS	Guadalajara, JA	\$7,371	\$431	\$79.72	\$2.17	2
	TX	Salinas Victoria, NL	\$4,329	\$77	\$45.02	\$1.22	1
Corn	IA	Guadalajara, JA	\$8,528	\$370	\$90.92	\$2.31	3
	SD	Celaya, GJ	\$7,880	\$0	\$80.51	\$2.04	2
	NE	Queretaro, QA	\$8,207	\$265	\$86.56	\$2.20	2
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	2
	MO	Tlalnepantla, EM	\$7,573	\$258	\$80.02	\$2.03	2
	SD	Torreon, CU	\$7,480	\$0	\$76.43	\$1.94	2
Soybeans	MO	Bojay (Tula), HG	\$8,284	\$344	\$88.16	\$2.40	3
	NE	Guadalajara, JA	\$8,842	\$370	\$94.12	\$2.56	2
	IA	El Castillo, JA	\$9,110	\$0	\$93.08	\$2.53	2
	KS	Torreon, CU	\$7,714	\$265	\$81.52	\$2.22	4
Sorghum	NE	Celaya, GJ	\$7,527	\$335	\$80.33	\$2.04	3
	KS	Queretaro, QA	\$8,000	\$157	\$83.34	\$2.11	2
	NE	Salinas Victoria, NL	\$6,633	\$126	\$69.05	\$1.75	3
	NE	Torreon, CU	\$6,962	\$247	\$73.66	\$1.87	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.

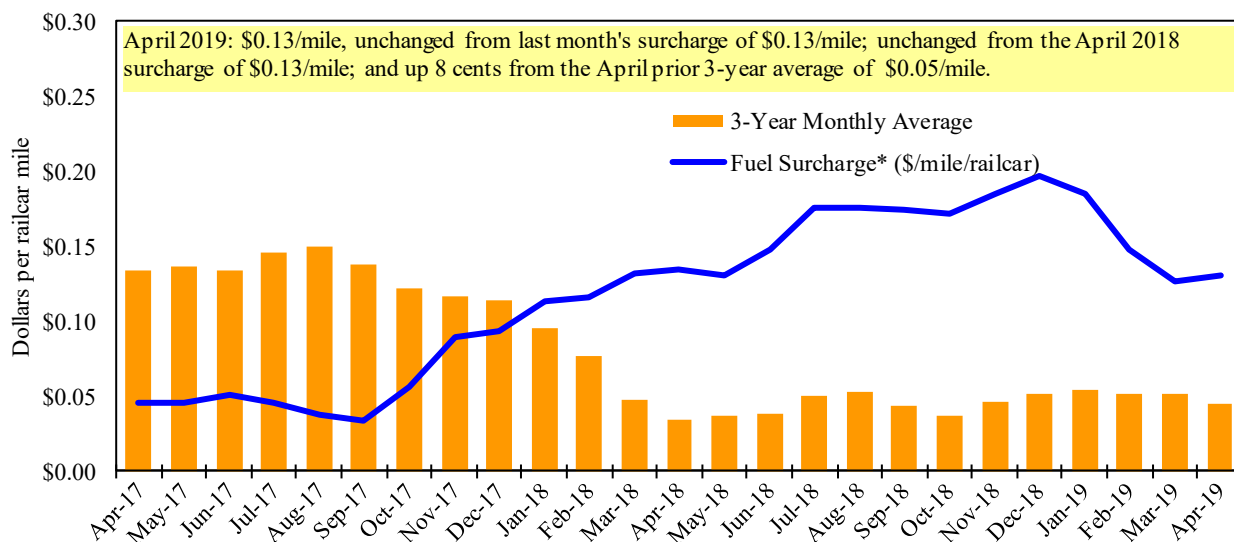
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

<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 calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

**Railroad Fuel Surcharges, North American Weighted Average<sup>1</sup>**

<sup>1</sup> Weighted by each Class I railroad's proportion of grain traffic for the prior year.

\* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

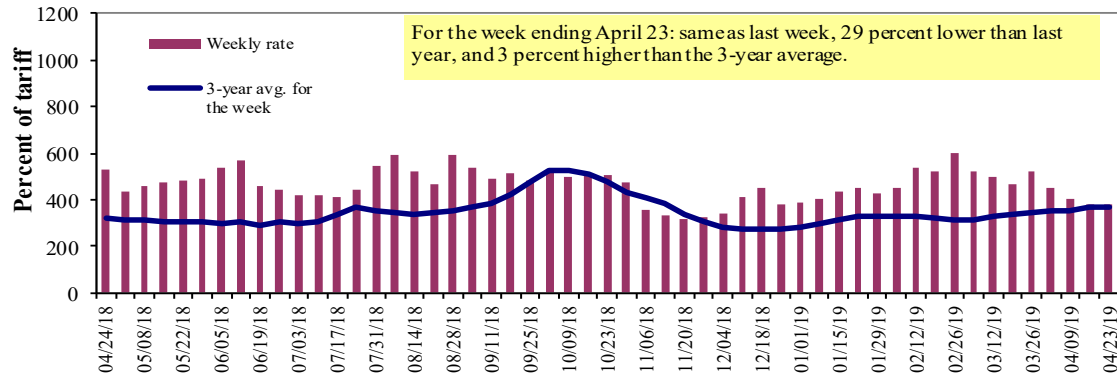
\*\* CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

# Barge Transportation

Figure 8

## Illinois River Barge Freight Rate<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.

Source: Transportation & Marketing Program/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate <sup>1</sup>	4/23/2019	-	-	378	278	293	293	275
	4/16/2019	-	-	380	283	318	320	275
\$/ton	4/23/2019	-	-	17.54	11.09	13.74	11.84	8.64
	4/16/2019	-	-	17.63	11.29	14.91	12.93	8.64
<b>Current week % change from the same week:</b>								
	Last year	-	-	-29	-34	-38	-38	-27
	3-year avg. <sup>2</sup>	-	-	3	-4	-4	-5	6
Rate <sup>1</sup>	May	453	397	385	282	297	297	270
	July	440	397	385	282	297	297	270

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

### Benchmark tariff rates

#### Calculating barge rate per ton:

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

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

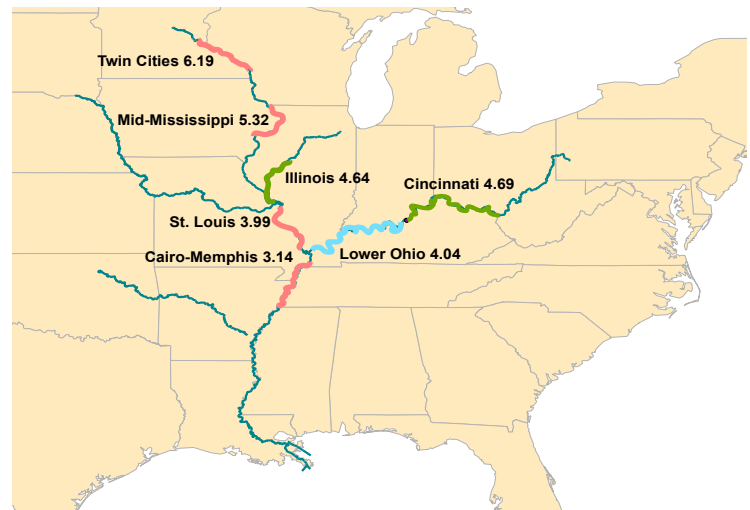
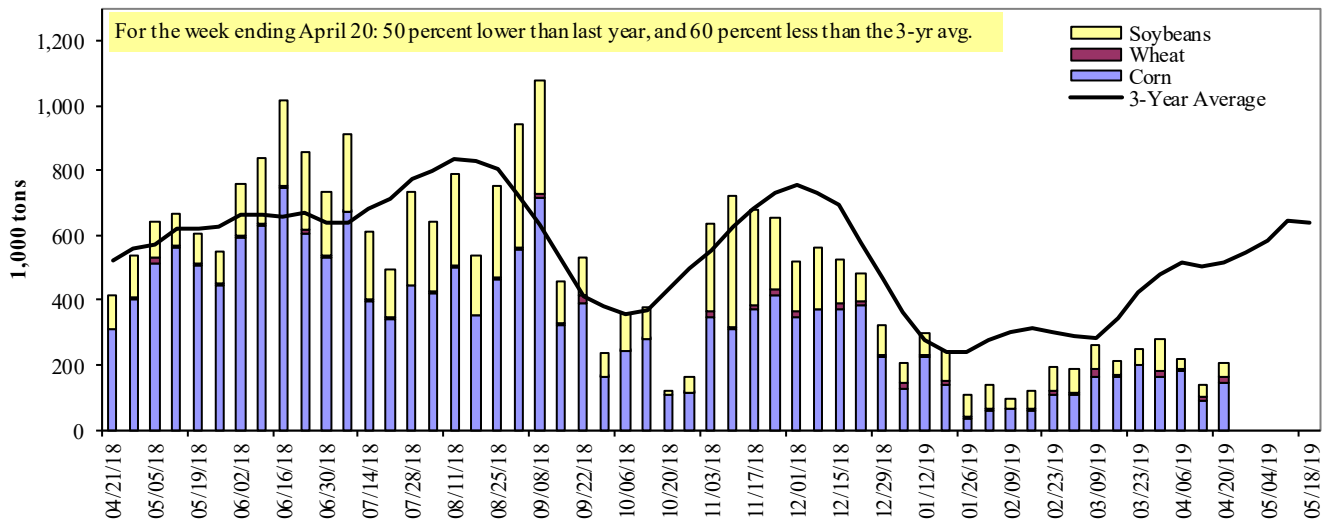


Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

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

For the week ending 04/20/2019	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)	143	19	59	5	226
Granite City, IL (L27)	143	19	59	5	226
<b>Illinois River (L8)</b>	108	19	45	0	172
<b>Ohio River (OLMSTED)</b>	146	9	64	0	219
<b>Arkansas River (L1)</b>	0	13	13	0	25
Weekly total - 2019	289	40	136	5	470
Weekly total - 2018	424	30	201	0	655
2019 YTD <sup>1</sup>	3,743	730	3,019	46	7,538
2018 YTD <sup>1</sup>	5,271	473	3,312	47	9,103
2019 as % of 2018 YTD	71	154	91	99	83
Last 4 weeks as % of 2018 <sup>2</sup>	66	197	94	247	80
<b>Total 2018</b>	<b>23,349</b>	<b>1,674</b>	<b>12,819</b>	<b>133</b>	<b>37,975</b>

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

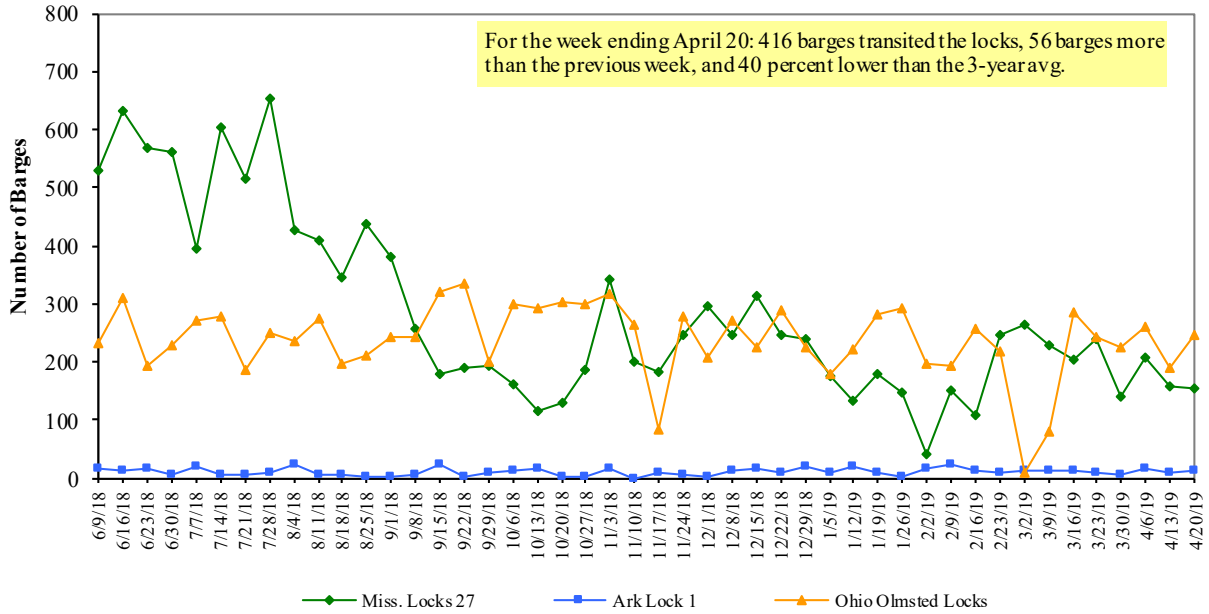
<sup>2</sup> As a percent of same period in 2018.

Note: 1. Total may not add exactly, due to rounding.

2. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

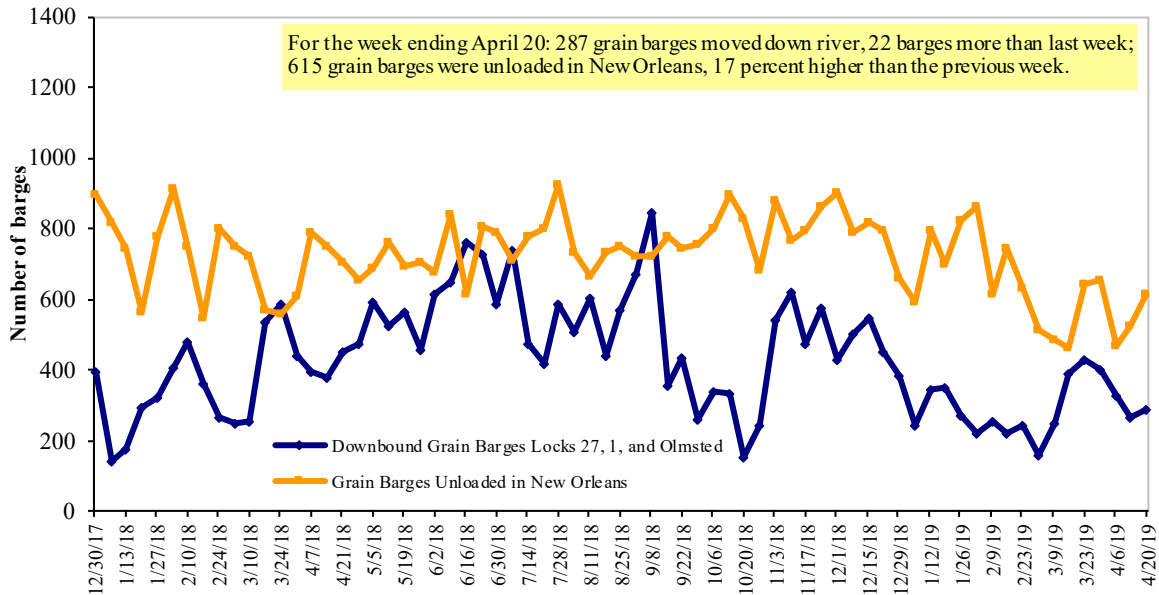
Source: U.S. Army Corps of Engineers

**Figure 11**  
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**



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 AMS FGIS

# Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

## Retail on-Highway Diesel Prices, Week Ending 4/22/2019 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.174	0.021	0.032
	New England	3.217	0.012	0.046
	Central Atlantic	3.370	0.028	0.075
	Lower Atlantic	3.033	0.018	0.005
II	Midwest	3.042	0.032	-0.005
III	Gulf Coast	2.917	0.018	-0.019
IV	Rocky Mountain	3.143	0.061	-0.038
V	West Coast	3.696	0.045	0.080
	West Coast less California	3.309	0.057	-0.057
	California	4.003	0.036	0.188
Total	U.S.	3.147	0.029	0.014

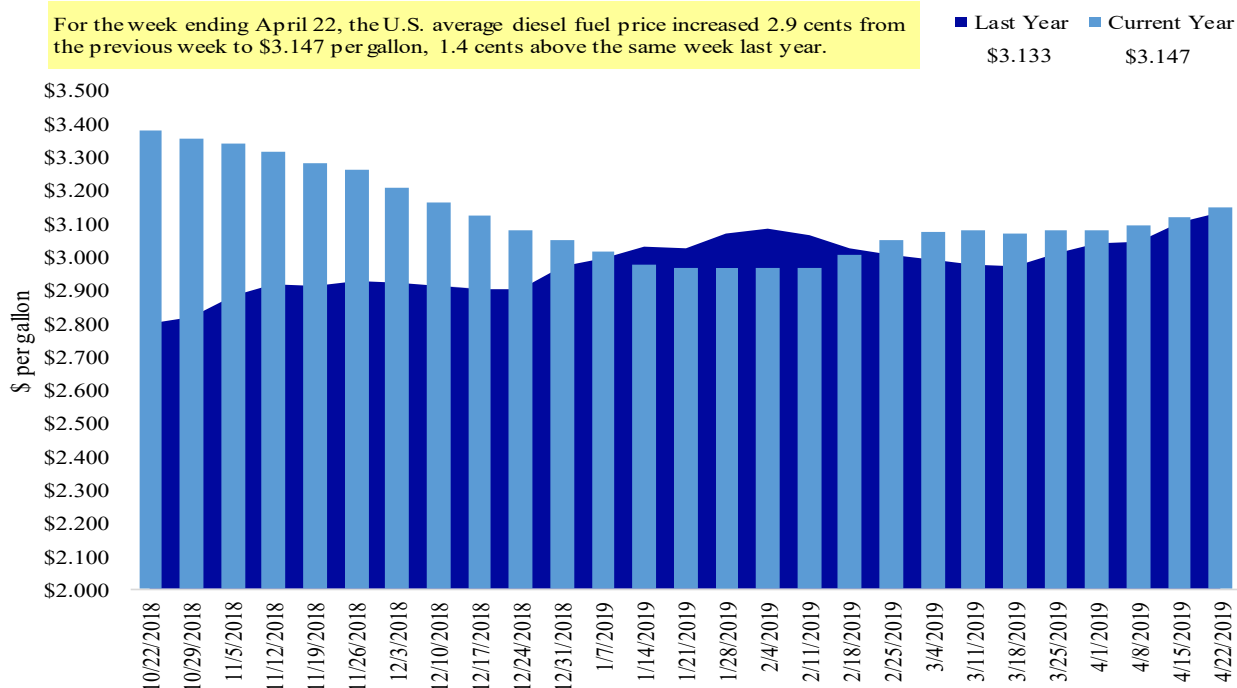
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

For the week ending April 22, the U.S. average diesel fuel price increased 2.9 cents from the previous week to \$3.147 per gallon, 1.4 cents above the same week last year.



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

# Grain Exports

Table 12

## U.S. Export Balances and Cumulative Exports (1,000 metric tons)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
4/11/2019	2,521	819	1,248	942	84	5,613	12,443	12,928	30,984
This week year ago	770	462	1,117	778	65	3,192	21,550	11,635	36,376
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2018/19 YTD	6,421	2,477	5,631	4,374	399	19,301	32,248	31,364	82,914
2017/18 YTD	8,315	1,978	4,827	4,351	309	19,780	27,735	42,348	89,862
YTD 2018/19 as % of 2017/18	77	125	117	101	129	98	116	74	92
Last 4 wks as % of same period 2017/18	324	189	119	133	156	183	61	112	88
2017/18 Total	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062

<sup>1</sup> Current unshipped (outstanding) export sales to date

<sup>2</sup> Shipped export sales to date; new marketing year now in effect for corn, soybeans, and wheat

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

For the week ending 4/11/2019	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2015-2017
	2018/19	2017/18		
	Current MY	Last MY		
- 1,000 mt -				
Mexico	14,264	12,349	16	13,691
Japan	9,720	8,966	8	11,247
Korea	3,615	4,040	(11)	4,754
Colombia	3,781	3,462	9	4,678
Peru	1,965	2,498	(21)	2,975
<b>Top 5 Importers</b>	<b>33,345</b>	<b>31,316</b>	<b>6</b>	<b>37,344</b>
<b>Total US corn export sales</b>	<b>44,691</b>	<b>49,285</b>	<b>(9)</b>	<b>53,184</b>
% of Projected	76%	79%		
Change from prior week <sup>2</sup>	<b>948</b>	<b>1,092</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	75%	64%		70%
<b>USDA forecast, April 2019</b>	<b>58,524</b>	<b>62,036</b>	<b>(6)</b>	
<b>Corn Use for Ethanol USDA forecast, April 2019</b>	<b>139,700</b>	<b>142,367</b>	<b>(2)</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup> Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from previous  
week's outstanding sales or accumulated sales.

<sup>3</sup> FAS Marketing Year Ranking Reports - http://apps.fas.usda.gov/export-sales/myrkaug.htm; 3-yr average

Table 14

**Top 5 Importers<sup>1</sup> of U.S. Soybeans**

For the week ending 4/11/2019	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2015-2017
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	12,922	28,877	(55)	31,228
Mexico	4,659	3,870	20	3,716
Indonesia	1,813	1,773	2	2,250
Japan	2,090	1,816	15	2,145
Netherlands	1,828	1,185	54	2,209
<b>Top 5 importers</b>	<b>23,311</b>	<b>37,521</b>	<b>(38)</b>	<b>41,549</b>
<b>Total US soybean export sales</b>	<b>44,292</b>	<b>53,983</b>	<b>(18)</b>	<b>55,113</b>
% of Projected	87%	93%		
Change from prior week <sup>2</sup>	<b>382</b>	<b>1,041</b>		
<b>Top 5 importers' share of U.S. soybean export sales</b>	53%	70%		<b>75%</b>
<b>USDA forecast, April 2019</b>	<b>51,090</b>	<b>58,011</b>	<b>88</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup> Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
http://www.fas.usda.gov/esrquery/. The total commitments change (net sales) from prior week could include revisions from previous week's  
outstanding sales and/or accumulated sales<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

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

For the week ending 4/11/2019	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2015-2017
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	3,060	2,857	7	2,781
Japan	2,738	2,742	(0)	2,649
Philippines	3,050	2,560	19	2,441
Korea	1,554	1,421	9	1,257
Nigeria	1,510	1,186	27	1,254
Indonesia	1,318	1,130	17	1,076
Taiwan	1,108	1,106	0	1,066
China	42	894	(95)	944
Colombia	600	347	73	714
Thailand	744	660	13	618
<b>Top 10 importers</b>	<b>15,723</b>	<b>14,903</b>	<b>5</b>	<b>14,800</b>
<b>Total US wheat export sales</b>	<b>24,914</b>	<b>22,971</b>	<b>8</b>	<b>22,869</b>
% of Projected	97%	94%		
Change from prior week <sup>2</sup>	<b>318</b>	<b>(67)</b>		
<b>Top 10 importers' share of U.S. wheat export sales</b>	63%	65%		65%
<b>USDA forecast, April 2019</b>	<b>25,749</b>	<b>24,550</b>	<b>5</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup> Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from the previous week's  
outstanding and/or accumulated sales<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.



Table 16

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

Port Regions	For the Week Ending 04/18/19	Previous Week*	Current Week as % of Previous	2019 YTD*	2018 YTD*	2019 YTD as % of 2018 YTD	Last 4-weeks as % of:		2018 Total*
							Last Year	Prior 3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	412	341	121	4,124	3,682	112	101	102	13,315
Corn	377	363	104	3,797	6,138	62	59	83	20,024
Soybeans	71	67	105	4,018	3,732	108	236	246	7,719
<b>Total</b>	<b>860</b>	<b>771</b>	<b>111</b>	<b>11,940</b>	<b>13,552</b>	<b>88</b>	<b>89</b>	<b>107</b>	<b>41,058</b>
<b>Mississippi Gulf</b>									
Wheat	117	62	187	1,543	1,445	107	94	107	3,896
Corn	745	606	123	8,540	9,846	87	79	89	33,735
Soybeans	132	241	55	8,038	8,227	98	119	100	28,124
<b>Total</b>	<b>994</b>	<b>910</b>	<b>109</b>	<b>18,121</b>	<b>19,518</b>	<b>93</b>	<b>88</b>	<b>93</b>	<b>65,755</b>
<b>Texas Gulf</b>									
Wheat	223	85	264	1,963	1,469	134	196	164	3,198
Corn	33	31	107	211	194	109	102	96	730
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	69
<b>Total</b>	<b>256</b>	<b>116</b>	<b>222</b>	<b>2,173</b>	<b>1,663</b>	<b>131</b>	<b>180</b>	<b>153</b>	<b>3,997</b>
<b>Interior</b>									
Wheat	80	25	323	522	474	110	141	127	1,614
Corn	167	163	103	2,125	2,329	91	83	91	8,650
Soybeans	189	159	119	2,047	1,871	109	116	140	6,729
<b>Total</b>	<b>436</b>	<b>347</b>	<b>126</b>	<b>4,693</b>	<b>4,674</b>	<b>100</b>	<b>101</b>	<b>112</b>	<b>16,993</b>
<b>Great Lakes</b>									
Wheat	22	12	184	64	57	112	89	72	894
Corn	0	0	n/a	0	23	0	0	0	404
Soybeans	0	26	0	43	0	n/a	n/a	150	1,192
<b>Total</b>	<b>22</b>	<b>38</b>	<b>57</b>	<b>107</b>	<b>80</b>	<b>134</b>	<b>99</b>	<b>76</b>	<b>2,491</b>
<b>Atlantic</b>									
Wheat	0	32	0	32	64	51	n/a	335	69
Corn	7	0	n/a	49	31	160	46	121	138
Soybeans	10	7	141	456	749	61	47	82	2,047
<b>Total</b>	<b>17</b>	<b>39</b>	<b>44</b>	<b>537</b>	<b>844</b>	<b>64</b>	<b>59</b>	<b>100</b>	<b>2,253</b>
<b>U.S. total from ports*</b>									
Wheat	854	557	153	8,249	7,191	115	117	115	22,986
Corn	1,329	1,163	114	14,722	18,561	79	73	88	63,682
Soybeans	402	501	80	14,601	14,580	100	132	133	45,879
<b>Total</b>	<b>2,585</b>	<b>2,220</b>	<b>116</b>	<b>37,572</b>	<b>40,331</b>	<b>93</b>	<b>92</b>	<b>103</b>	<b>132,547</b>

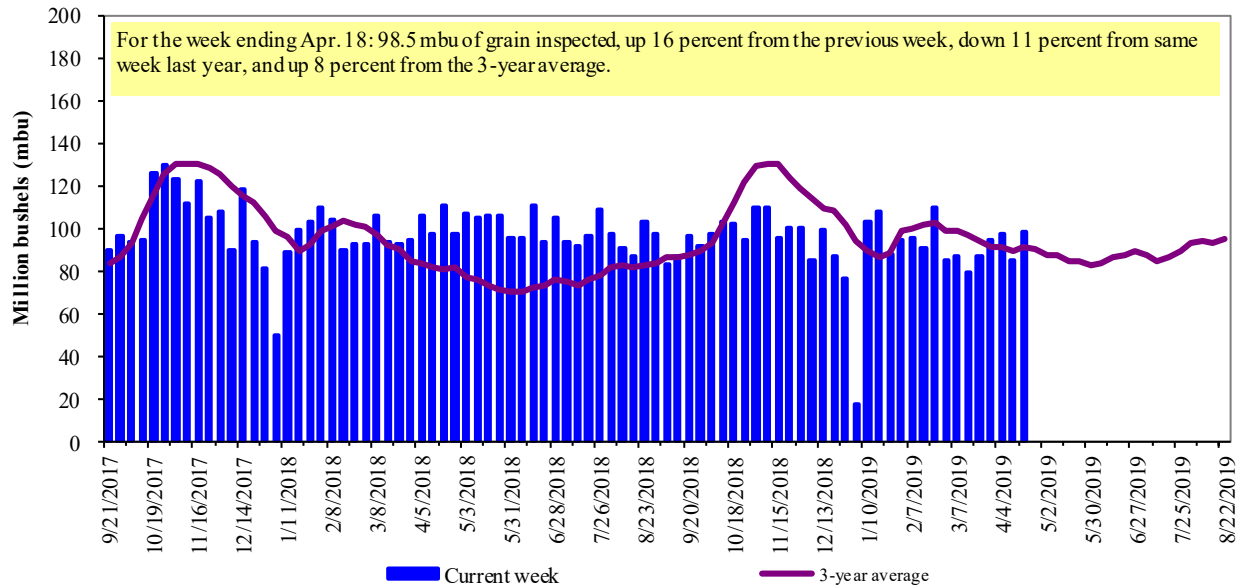
\*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA/Federal Grain Inspection Service ([www.gipsa.usda.gov/fgis](http://www.gipsa.usda.gov/fgis)); 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, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 53 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2018.

Figure 14

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

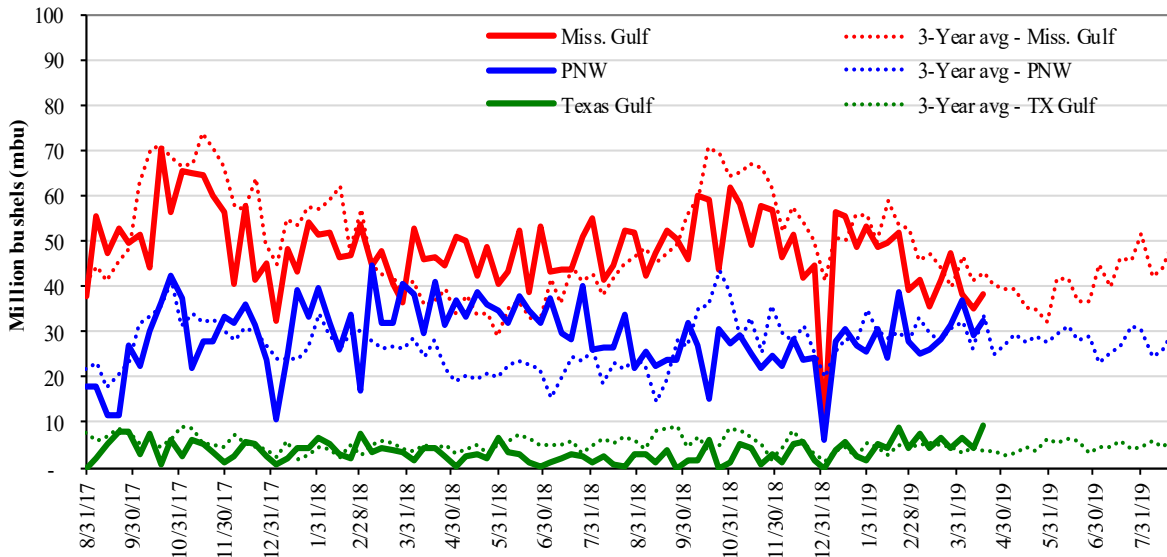


Source: USDA/Federal Grain Inspection Service ([www.gipsa.usda.gov/fgis](http://www.gipsa.usda.gov/fgis))

Note: 3-year average consists of 4-week running average

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



<u>Week ending 04/18/19 inspections (mbu):</u>		<u>Percent change from:</u>				
Mississippi Gulf:	38.5	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	32.6	Last Year (same week):	up 10	up 120	up 22	up 11
Texas Gulf:	9.5	3-yr avg. (4-wk. mov. Avg):	down 17	up 109	down 6	down 20
			down 10	up 133	up 3	up 6

Source: USDA/Federal Grain Inspection Service ([www.gipsa.usda.gov/fgis](http://www.gipsa.usda.gov/fgis))

# Ocean Transportation

Table 17

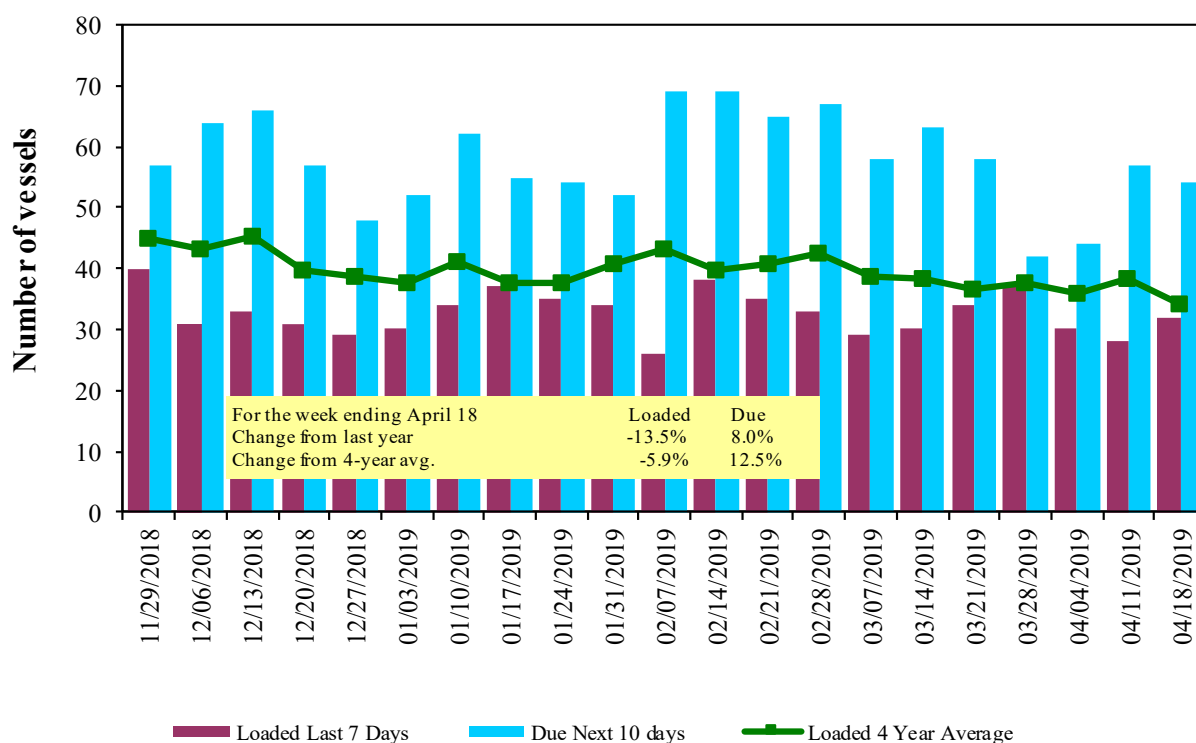
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
4/18/2019	31	32	54	24
4/11/2019	29	28	57	30
2018 range	(23..88)	(24..41)	(38..67)	(4..30)
2018 avg.	40	34	54	17

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

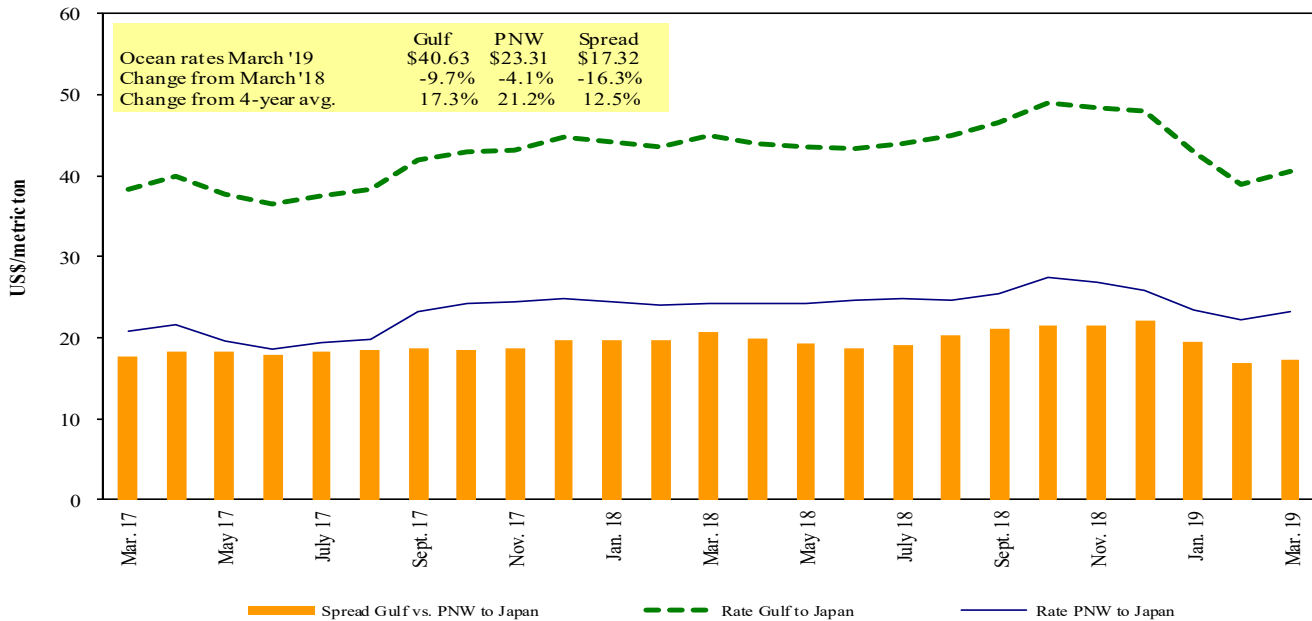
**U.S. Gulf Vessel Loading Activity**



Source: Transportation & Marketing Program/AMS/USDA  
 \*U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

**Grain Vessel Rates, U.S. to Japan**



Data Source: O'Neil Commodity Consulting

Table 18

**Ocean Freight Rates For Selected Shipments, Week Ending 04/20/2019**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jun 1/30	63,000	42.00
U.S. Gulf	China	Heavy Grain	Mar 15/Apr 15	63,000	40.00
PNW	China	Heavy Grain	Mar 2/18	60,000	27.50
PNW	Oman	Wheat	Feb 18/28	25,000	69.94*
PNW	Taiwan	Heavy Grain	Sep 15/Oct 31	63,000	25.00
Brazil	China	Heavy Grain	Apr 15/30	63,000	32.50
Brazil	China	Heavy Grain	Mar 20/30	66,000	13.30
Brazil	China	Heavy Grain	Mar 3/11	63,000	27.50
Brazil	China	Heavy Grain	Feb 26/Mar 4	66,000	24.75
Brazil	China	Heavy Grain	Feb 20/25	65,000	26.00
Brazil	China	Heavy Grain	Feb 13/26	60,000	26.75
Brazil	China	Heavy Grain	Jan 22/30	60,000	29.50
Brazil	China	Heavy Grain	Dec 15/20	60,000	37.50
Brazil	China	Heavy Grain	Dec 1/10	60,000	36.25
Brazil	China	Heavy Grain	Nov 20/30	60,000	38.00
Brazil	China	Heavy Grain	Nov 1/10	60,000	34.00
Brazil	S.Korea	Heavy Grain	Nov 5/10	66,000	43.00
River Plate	China	Heavy Grain	Apr 21/30	65,000	37.85

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

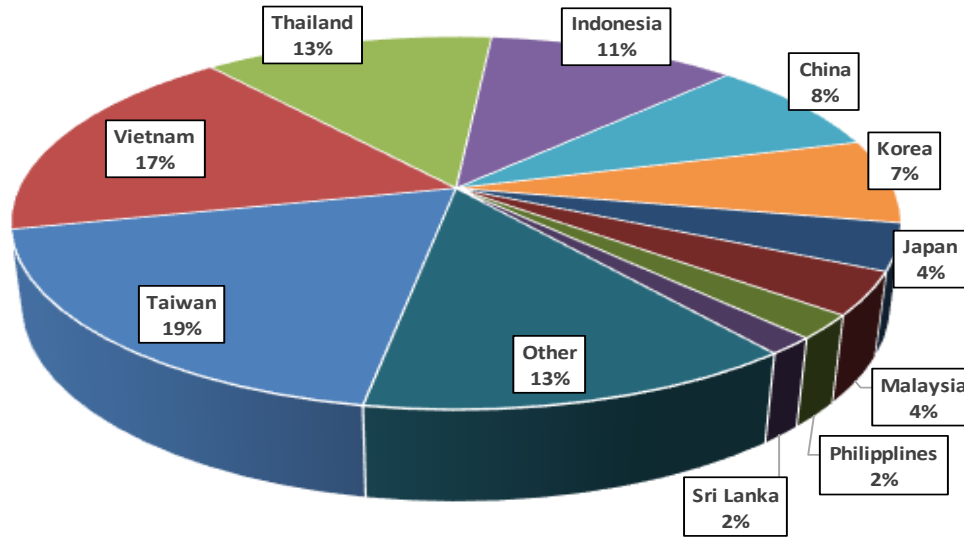
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2017, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2017 went to Asia, of which 10 percent were moved in containers. Approximately 93 percent of U.S. waterborne containerized grain exports were destined for Asia.

Figure 18

**Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018**

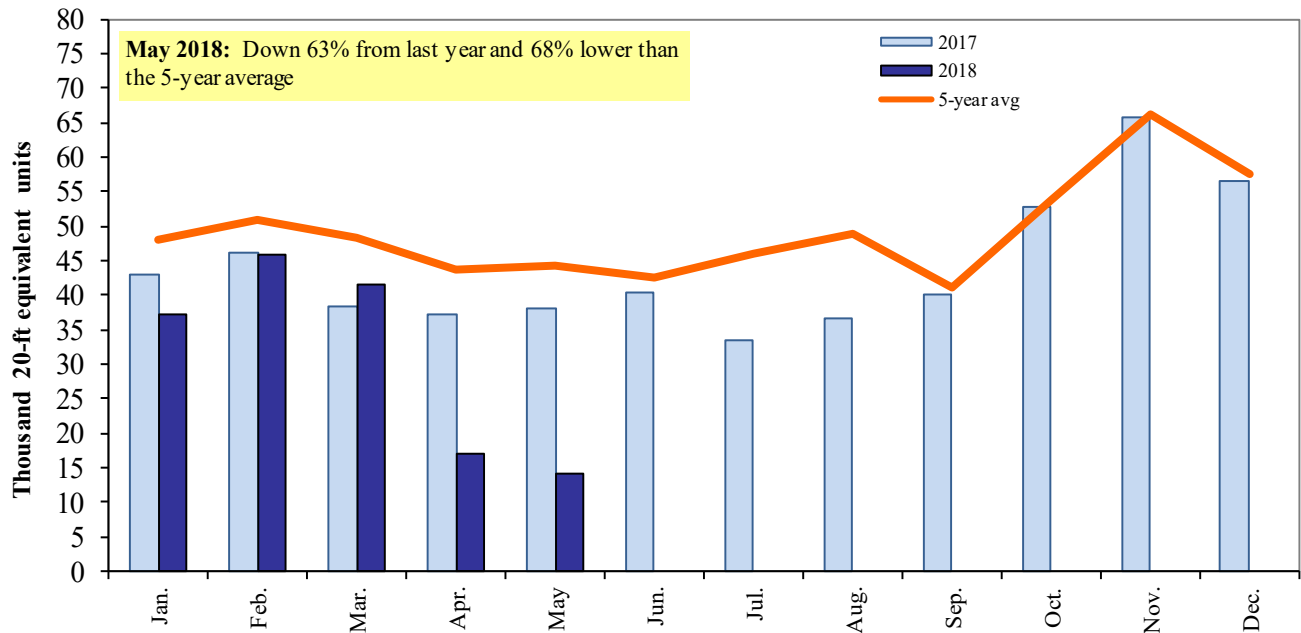


Service (PIERS) data

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

Figure 19

**Monthly Shipments of Containerized Grain to Asia**



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

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

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