



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

Contents

Article/
Calendar

Grain
Transportation
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean
Rate Advisory

Datasets

Specialists

Subscription
Information

The next
release is
May 23, 2019

Wheat Inspections Reach a High for the Year

For the week ending May 9, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.41 million metric tons (mmt). This amount signifies a 12 percent increase from the previous week, a 13 percent decrease from last year, and a 4 percent increase from the 3-year average. Increased grain inspections were mainly caused by a 57 percent jump in inspections of wheat. Weekly inspections of wheat reached a high of .887 mmt for the year, with shipments increasing to Africa and Asia. Corn inspections increased 2 percent, while soybean inspections decreased 15 percent, from week to week. Total inspections of grain increased 38 percent in the Pacific Northwest (PNW) and 4 percent in the Mississippi Gulf region.

Upper Mississippi River Improves, while Water Levels Rise in the Lower River to New Orleans

For the week ending May 11, high water conditions continued to disrupt grain barge movements. There were no grain barge shipments transiting Mississippi River Locks 27 (above St. Louis, MO) and LaGrange Lock and Dam (L&D), near Versailles, IL, on the Illinois River. Almost all down-bound grain barge movements were reported on the Ohio River, which doubled the total tonnage of grain barge movements (370 million tons) from the previous week for the Olmsted L&D. As of May 15, the U.S. Army Corps of Engineers (Corps) reports Mississippi River levels in the Rock Island, IL, area and St. Louis, MO, area continue to recede from their crests and are forecast to fall from major flood stage to moderate flood stage. Portions of the Illinois River are beginning to slowly recede, but will remain at major flood stage through the week of May 19. Mississippi River levels in the Vicksburg, MS and New Orleans areas are increasing. On May 10, the Corps re-opened the Bonnet Carré Spillway to reduce flood risk to the city of New Orleans. For more on Bonnet Carré Spillway operations, and St. Louis Harbor conditions, see this week's **feature article**.

STB Hearing on Demurrage and Accessorial Charges: May 22-23

Next week, the Surface Transportation Board (STB) will hold a public hearing on demurrage and accessorial charges (Docket No. EP 754). Due to the number of parties interested in speaking, the STB has extended the hearing to two days, May 22-23. For a schedule of speakers and their allotted time, see **STB's May 9 decision**. Comments and filings from interested stakeholders, including USDA, can be viewed online using **STB's search engine** (filter Docket to "EP" and type "754" to the right of the dash). While the hearing will not be livestreamed, it will be recorded, and the video will be made available afterward. USDA's comments can also be seen on **our website**.

Snapshots by Sector

Export Sales

For the week ending May 2, **unshipped balances** of wheat, corn, and soybeans totaled 26.7 mmt. This indicates an 18 percent decrease in outstanding sales, compared to the same time last year. Net weekly **wheat export sales** were .091 mmt, down 25 percent from the previous week. Net **corn export sales** totaled .288 mmt, down 51 percent from the previous week. Net **soybean export sales** were negative .149 mmt, down significantly from the past week.

Rail

U.S. Class I railroads originated 22,287 **grain carloads** for the week ending May 4. This is down 11 percent from the previous week and 11 percent from last year, but 3 percent higher than the 3-year average.

Average May shuttle **secondary railcar** bids/offers (per car) were \$58 above tariff for the week ending May 9, \$148 above last week but \$323 lower than last year. Average non-shuttle secondary railcar bids/offers were \$100 above tariff, \$163 below last week and \$600 lower than last year.

Barge

For the week ending May 11, **barge grain movements** totaled 369,723 tons. This is 26 percent less than the previous week and 56 percent lower than the same period last year.

For the week ending May 11, 200 grain barges **moved down river**. This is 107 fewer barges than the previous week. There were 513 grain barges **unloaded in New Orleans**, 8 percent less than the previous week.

Ocean

For the week ending May 9, 30 **ocean-going grain vessels** were loaded in the Gulf. This is 17 percent less than the same period last year. Fifty-four vessels are expected to be loaded within the next 10 days. This is 10 percent more than the same period last year.

As of May 9, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$42.50. This is unchanged from the previous week. The rate for the Pacific Northwest to Japan was \$23.00 per mt. This is also unchanged from the previous week.

Fuel

For the week ending May 13, the **U.S. average diesel fuel price** decreased 1.1 cents, from the previous week, to \$3.160 per gallon. This price is 7.9 cents below the same week last year.

Feature Article/Calendar

Grain Transportation Update

For most of 2019, inclement weather has disrupted barge traffic along the Mississippi, Ohio, and Arkansas Rivers. This has caused year-to-date (YTD) grain barge tonnages, through the locking portions of the rivers, to fall below the 3-year average and last year. YTD grain shipments by rail were also down, compared to a year ago, but have picked up in recent weeks. On average, grain train speeds and origin dwell times have improved, year-to-date in 2019 compared to 2018, despite the negative effects of Midwest weather on rail operations that show in service metrics, carloads, and auction market rates over the period. While ocean freight rates for shipping bulk grain have remained relatively low, average diesel fuel prices have increased compared to the beginning of the year. Total grain (corn, soybeans and wheat) production and exports for the marketing year 2019/20 are projected to increase. This could boost the demand for grain transportation service if the projections are realized.

Rail Characterized by Low Carloads and High Rates in the Secondary Market

As of the week ending May 4, 2019, YTD grain shipments by rail were down 5 percent, compared to a year ago. While relatively high through January, grain carloads fell well below average into mid-April 2019 ([GTR Figure 3](#)). However, grain carloads, based on a four-week running average, have resurged in recent weeks with traffic levels exceeding the 3-year average since late-April, creating a “v-shaped” trend over the period of high-low-high. Concurrently, rates in the secondary auction market for shuttle service have generally been above average for much of 2019. While initially trading below average in January, average bids/offers for delivery of shuttle railcars in February rose to about \$1,200 per car by February 14. Per car rates for March and April averaged \$910 and \$460, respectively. Compared to the 3-year average, this is a respective increase between \$360 and \$560 per car. Trades for delivery of railcars in the secondary market in May are still above average, but by a smaller magnitude.

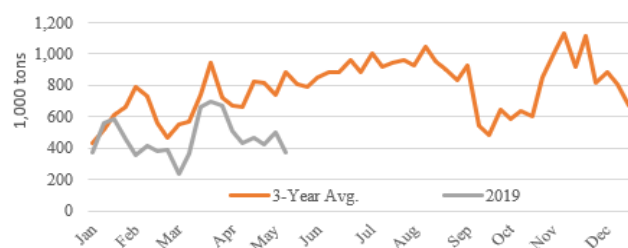
Like the trend in carloads, there has been a parallel “v-shaped” pattern in rail performance, where service levels deteriorated from January to March, due to problems caused by flooding with significant re-routing, but have improved since. More specifically, train speeds for grain averaged 23.4 miles per hour (MPH) in January and 21.9 MPH in March, a decline of 6 percent, before improving to about 22.7 MPH. The railroads have dealt with bouts of poor weather the past few months, including severe winter storms and washouts in February, and catastrophic flooding in the Midwest in March and April (see [April 4, 2019 Grain Transportation Report \(GTR\)](#)). Despite these challenges, average YTD rail speeds and origin dwell times for grain have been better in 2019 than last year, when railroads faced adverse weather, relatively more congestion, and other service challenges (see [April 26, 2018 GTR](#)).

Flooding Causing Significant Navigation Disruptions

As of May 11, calendar YTD grain barge tonnages, through the locking portions of the Mississippi, Ohio, and Arkansas Rivers, were 8.8 million tons. This is 32 percent below the 3-year average and 24 percent lower than last year. For most of 2019, above average rainfall has caused high water conditions that have disrupted traffic. Typically, by mid-May, there is continuous barge traffic (both up and down river) on the Mississippi River between Minneapolis-St. Paul, MN, and the Gulf of Mexico. This year, navigation has been blocked by the closure of several locks above St. Louis and by low bridge clearances in certain areas due to high water. This has affected the movements of downbound grain and upbound fertilizer.

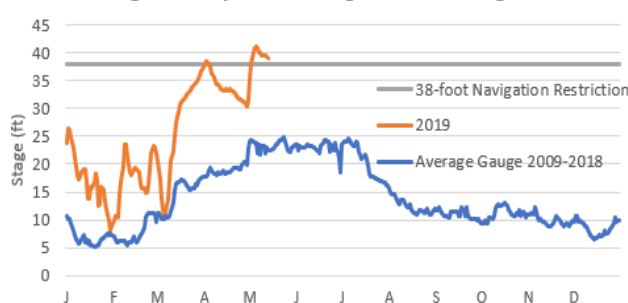
Figure 1 shows weekly tonnages have been lower than average for most of 2019. Calendar YTD corn barge shipments were 4.5 million tons, down 43 percent compared to the 3-year average. YTD soybean barge shipments were 3.4 million tons, 18 percent less than the 3-year average.

Figure 1: Weekly grain barge tonnages, 2019 and 3-Year Average



Source: U.S. Army Corps of Engineers

Figure 2: Daily St. Louis Gauge, 2019 and Average



Source: U.S. Geological Survey

On May 3, the Mississippi River gauge at St. Louis exceeded 38 feet, which is the threshold at which the U.S. Coast Guard closes the river to all vessel traffic in the St. Louis Harbor (see figure 2).¹ As of May 15, the St. Louis gauge dropped to near the 38-foot stage, and the river re-opened to a back-up of barges waiting to transit the harbor. The river level rose above the 38-foot stage on April 3-4 –briefly stopping traffic. The record stage was set on August 1, 1993 at 49.6 feet.

On May 10, the U.S. Army Corps of Engineers (Corps) opened the Bonnet Carré Spillway for the second time this year. The spillway, located on the Mississippi River north of New Orleans, functions to decrease flood conditions through the New Orleans region and reduce flood risk to the city and surrounding areas. Operation of the spillway diverts Mississippi River floodwaters, via Lake Pontchartrain, into the Gulf of Mexico. Prior to this opening, the spillway was opened on February 27. The Corps indicated this is the first time the spillway has been opened twice during the same high-water event since the spillway was first used in 1937.

Dry-Bulk Freight Rates Continued to Remain Low

To the delight of shippers, ocean freight rates for shipping bulk commodities, including grain, have continued to remain relatively low, despite the wave of optimism by vessel owners thinking the market would rally. As of May 9, 2019, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$42.50 per metric ton (mt), a 10 percent decrease from the beginning of the year, and an 8 percent decrease from the same period last year. The cost of shipping from the Pacific Northwest was \$23 per mt, a 3 percent decrease from the beginning of the year, and 6 percent below the same period a year ago. Ocean freight rates have remained relatively low since the beginning of the year. However, the January 1, 2020 deadline for International Maritime Organization’s mandate to reduce sulfur emissions from ocean-going vessels, could impact both newly-built vessels and vessel demolition activities. As a result, an upward pressure on the rates may occur, at least in the short term (see April 25, 2019 [GTR](#)).

Year-to-Date 2019 Diesel Fuel Prices on Upward Trend

Average U.S. On-Highway Diesel Fuel Prices have increased 11 cents since the beginning of the year. Prices increased 8 cents in February, remained relatively flat in March, then increased 9 cents in April. Crude oil prices followed a similar upward trend since the beginning of the year, averaging \$71 per barrel in April. According to the Energy Information Agency’s latest [Short-Term Energy Outlook](#), crude oil spot prices will average \$70 per barrel in 2019. However, EIA forecasts tighter global oil market balances in mid-2019 and increasing supply disruption risks globally, all of which could put additional upward pressure on diesel fuel prices.

Outlook for 2019/20

According to the USDA’s May [World Agricultural Supply and Demand Estimates \(WASDE\) report](#), production of corn, soybeans, and wheat for 2019/20 is projected to reach 21.1 billion bushels, up 2 percent from the past year. Total exports of the three major grains are expected to reach 5.1 billion bushels, up 3 percent from 2018/19 (Table 1). Production of corn is projected to reach 15 billion bushels, up 6 percent from last year. Soybean production is projected to reach 4.2 billion bushels for 2019/20, down 9 percent from last year. Wheat production is expected to increase 1 percent from 2018/19. Currently, export sales commitments of corn and soybeans for 2018/19 are down 10 and 18 percent, respectively, from last year. Wheat commitments, however, increased 10 percent from the previous marketing year ([GTR Tables 13-15](#)). Outstanding export sales for 2018/19 are currently are up 65 and 9 percent for wheat and soybeans, but are down 46 percent for corn ([GTR Table 12](#)).

	Corn	Soybeans	Wheat	Total	Y/Y
United States 2019/20 (Projected)					
Production	15,030	4,150	1,897	21,077	2.2%
Exports	2,275	1,950	900	5,125	2.5%
Domestic Use	12,400	2,245	1,123	15,768	1.7%
Ending Stocks/Use	16.9%	23.1%	56.4%		
United States 2018/19 (Estimated)					
Production	14,200	4,544	1,884	20,628	-0.6%
Exports	2,300	1,775	925	5,000	-8.6%
Domestic Use	12,200	2,229	1,072	15,501	-0.7%
Ending Stocks/Use	14.4%	24.9%	56.4%		
2017/18					
Production	14,609	4,412	1,741	20,762	
Exports	2,438	2,129	901	5,468	
Domestic Use	12,360	2,168	1,079	15,607	
Ending Stocks/Use	14.5%	10.2%	55.5%		

Corn and wheat exports are projected to decrease slightly for 2019/20, but soybeans exports are expected to increase 10 percent (*See Table*). Although the transportation demand for some grain has been affected by high water conditions on the Mississippi River, increased YTD rail shipments of grain to the Mississippi Gulf have remained strong, helping U.S. grain exports to remain competitive. GTRContactUs@usda.gov

¹ River gauge is measurement of the river level as a reference point and not equal to actual river depth.

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
05/15/19	212	285	223	n/a	190	163
05/08/19	213	294	216	n/a	190	163

¹Indicator: 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)
 n/a = not available due to flooding of the river
 Source: Transportation & Marketing Program/AMS/USDA

Table 2

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

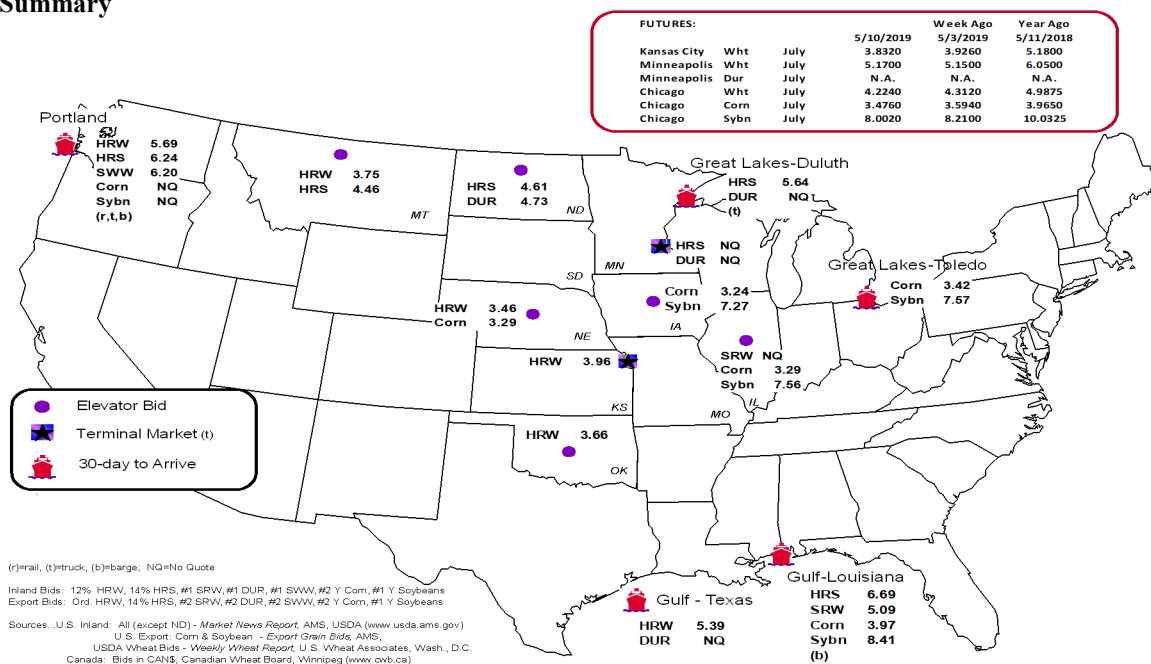
Commodity	Origin--Destination	5/10/2019	5/3/2019
Corn	IL--Gulf	-0.68	-0.70
Corn	NE--Gulf	-0.68	-0.66
Soybean	IA--Gulf	-1.14	-1.15
HRW	KS--Gulf	-1.43	-1.42
HRS	ND--Portland	-1.63	-1.60

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)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
5/08/2019 ^p	944	1,617	4,686	320	7,567	5/4/2019	2,881
5/01/2019 ^r	774	974	4,835	486	7,069	4/27/2019	2,682
2019 YTD ^f	15,583	22,246	105,630	6,930	150,389	2019 YTD	41,672
2018 YTD ^f	7,871	27,812	123,610	8,272	167,565	2018 YTD	37,078
2019 YTD as % of 2018 YTD	198	80	85	84	90	% change YTD	112
Last 4 weeks as % of 2018 ²	210	149	76	47	87	Last 4wks % 2018	98
Last 4 weeks as % of 4-year avg. ²	440	90	112	94	116	Last 4wks % 4 yr	111
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

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2018 and prior 4-year average.

³ 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.

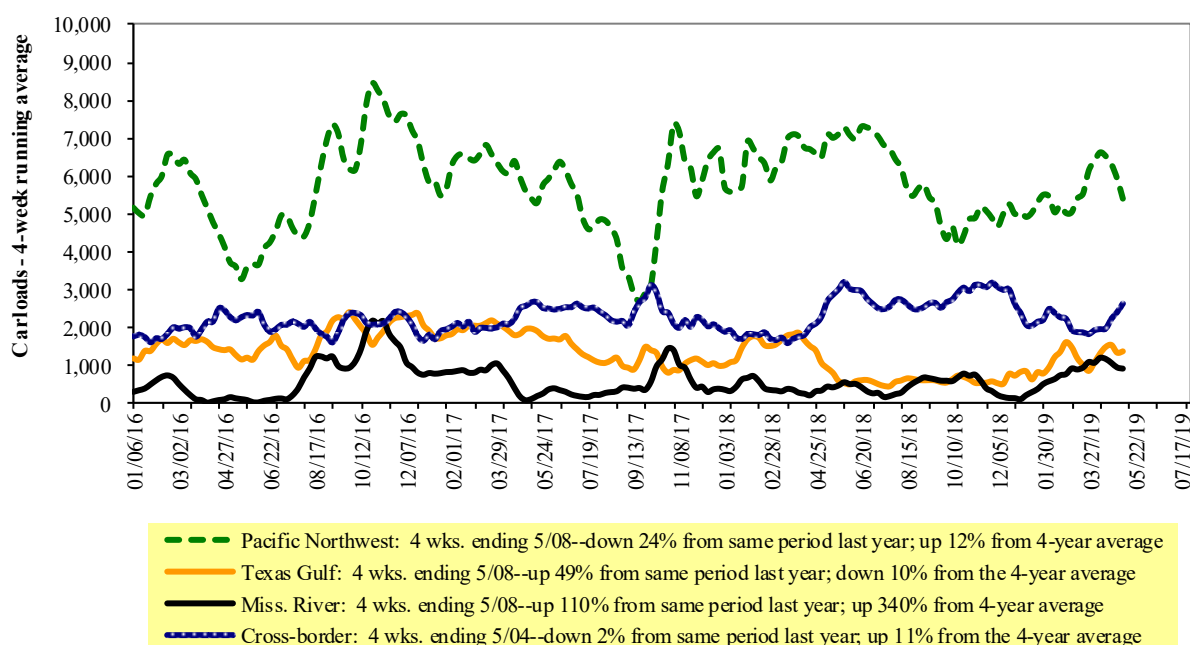
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

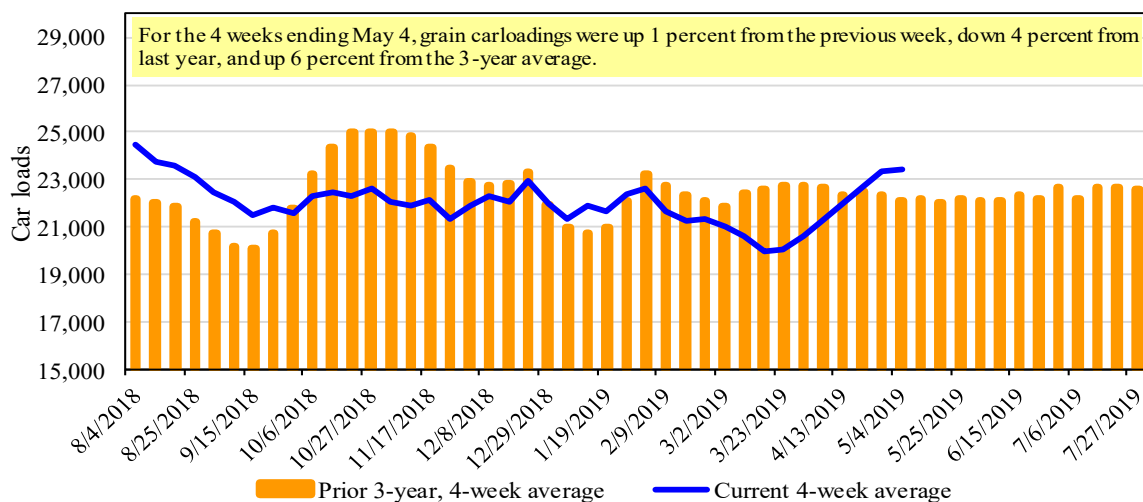
For the week ending: 5/4/2019	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,927	3,144	10,982	1,217	5,017	22,287	4,776	4,551
This week last year	2,032	2,972	13,917	1,008	5,169	25,098	4,193	5,918
2019 YTD	35,504	49,616	194,917	20,471	92,560	393,068	79,176	77,897
2018 YTD	34,816	44,826	222,298	16,716	94,625	413,281	66,502	80,165
2019 YTD as % of 2018 YTD	102	111	88	122	98	95	119	97
Last 4 weeks as % of 2018*	82	108	90	119	106	96	129	103
Last 4 weeks as % of 3-yr avg.**	99	113	106	116	104	106	144	113
Total 2018	98,978	133,172	635,458	48,638	267,713	1,183,959	211,807	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 Offerings¹ (\$/car)²

For the week ending: 5/9/2019		Delivery period							
		May-19	May-18	Jun-19	Jun-18	Jul-19	Jul-18	Aug-19	Aug-18
BNSF ³	COT grain units	no offer	no offer	0	no offer	0	0	25	no bids
	COT grain single-car ⁵	no offer	no offer	257	no offer	171	3	167	0
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	10	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a

¹ Auction offerings are for single-car and unit train shipments only.

² Average premium/discount to tariff, last auction

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

⁴ UP - GCAS = Grain Car Allocation System

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

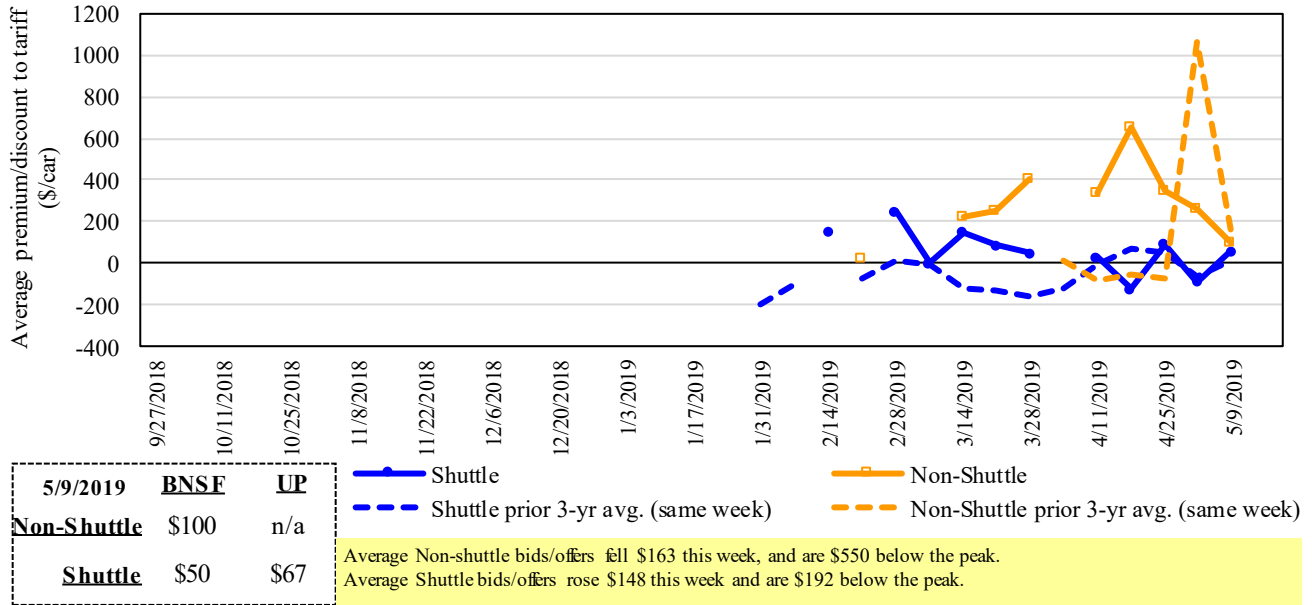
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Program/AMS/USDA.

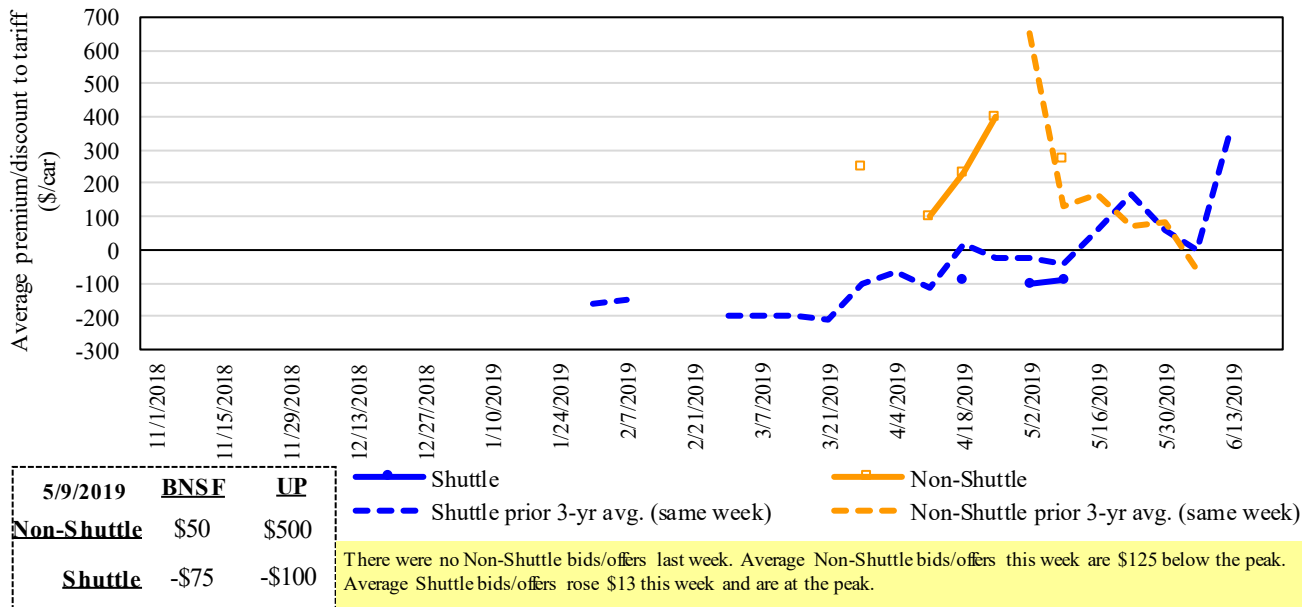
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



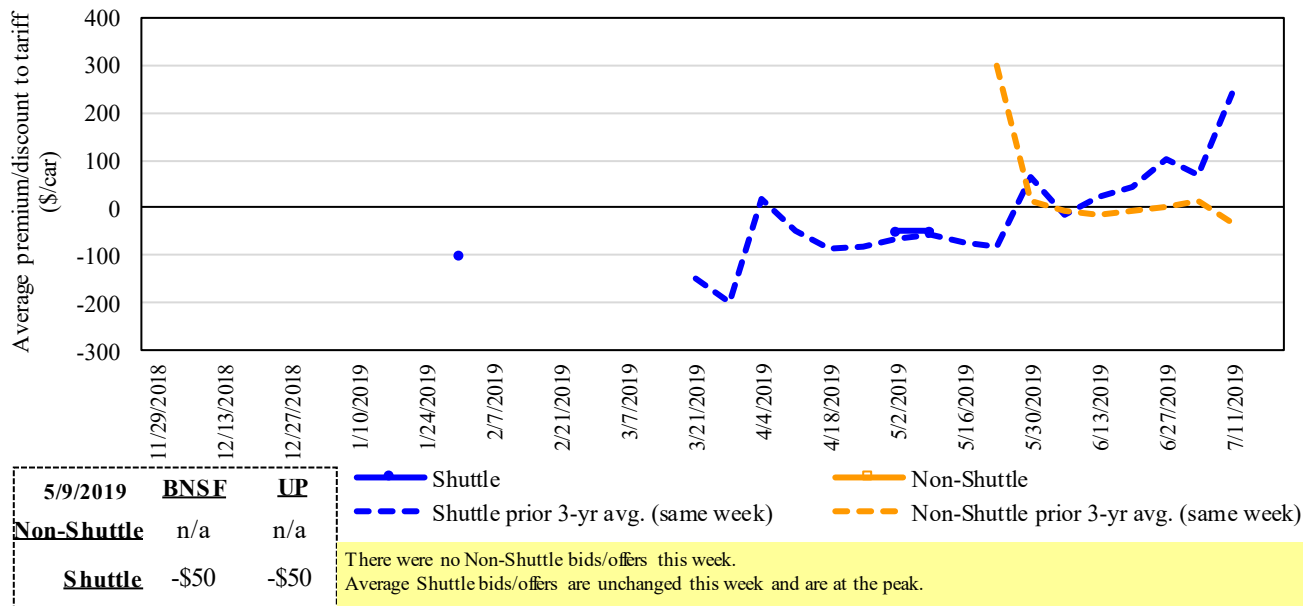
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Program/AMS/USDA

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)¹

For the week ending:		Delivery period					
		May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19
Non-shuttle	5/9/2019						
	BNSF-GF	100	50	n/a	n/a	n/a	n/a
	Change from last week	50	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	n/a	(200)	n/a	n/a	n/a	n/a
	UP-Pool	n/a	500	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 2018	n/a	(125)	n/a	n/a	n/a	n/a	
Shuttle	BNSF-GF	50	(75)	(50)	n/a	n/a	n/a
	Change from last week	113	n/a	n/a	n/a	n/a	n/a
	Change from same week 2018	(800)	(575)	n/a	n/a	n/a	n/a
	UP-Pool	67	(100)	(50)	n/a	n/a	125
	Change from last week	184	0	0	n/a	n/a	(25)
Change from same week 2018	154	(25)	(150)	n/a	n/a	(275)	

¹Average 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 Shipments¹

May, 2019	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel ²	Percent change Y/Y ⁴
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$101	\$40.56	\$1.10	3
	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	\$178	\$46.85	\$1.28	0
	Sioux Falls, SD	Galveston-Houston, TX	\$6,911	\$0	\$68.63	\$1.87	2
	Northwest KS	Galveston-Houston, TX	\$4,816	\$195	\$49.76	\$1.35	0
	Amarillo, TX	Los Angeles, CA	\$5,121	\$271	\$53.55	\$1.46	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$201	\$41.72	\$1.06	2
	Toledo, OH	Raleigh, NC	\$6,581	\$0	\$65.35	\$1.66	4
	Des Moines, IA	Davenport, IA	\$2,258	\$43	\$22.85	\$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	\$125	\$37.08	\$0.94	0
	Des Moines, IA	Los Angeles, CA	\$5,327	\$365	\$56.52	\$1.44	1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$194	\$37.98	\$1.03	-11
	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	\$201	\$49.12	\$1.34	0
Shuttle Train							
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	\$320	\$61.88	\$1.68	2
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	\$201	\$39.73	\$1.01	2
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	5
	Des Moines, IA	Amarillo, TX	\$4,060	\$157	\$41.88	\$1.06	3
	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	\$232	\$49.72	\$1.35	0
	Toledo, OH	Huntsville, AL	\$4,634	\$0	\$46.02	\$1.25	6
	Grand Island, NE	Portland, OR	\$5,710	\$327	\$59.95	\$1.63	1

¹A 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.

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

³Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

⁴Percentage 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: May, 2019			Fuel			Percent	
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,284	\$0	\$74.43	\$2.02	-2
	OK	Cuautitlan, EM	\$6,743	\$139	\$70.32	\$1.91	2
	KS	Guadalajara, JA	\$7,371	\$424	\$79.65	\$2.17	2
	TX	Salinas Victoria, NL	\$4,329	\$85	\$45.10	\$1.23	1
Corn	IA	Guadalajara, JA	\$8,528	\$373	\$90.95	\$2.31	4
	SD	Celaya, GJ	\$7,880	\$0	\$80.51	\$2.04	2
	NE	Queretaro, QA	\$8,207	\$291	\$86.83	\$2.20	3
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	2
	MO	Tlalnepantla, EM	\$7,573	\$284	\$80.28	\$2.04	3
	SD	Torreón, CU	\$7,480	\$0	\$76.43	\$1.94	2
Soybeans	MO	Bojay (Tula), HG	\$8,284	\$346	\$88.18	\$2.40	3
	NE	Guadalajara, JA	\$8,842	\$374	\$94.16	\$2.56	3
	IA	El Castillo, JA	\$9,110	\$0	\$93.08	\$2.53	2
	KS	Torreón, CU	\$7,714	\$271	\$81.58	\$2.22	4
Sorghum	NE	Celaya, GJ	\$7,527	\$340	\$80.38	\$2.04	3
	KS	Queretaro, QA	\$8,000	\$174	\$83.52	\$2.12	2
	NE	Salinas Victoria, NL	\$6,633	\$140	\$69.20	\$1.76	3
	NE	Torreón, CU	\$6,962	\$255	\$73.74	\$1.87	3

¹Rates 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.

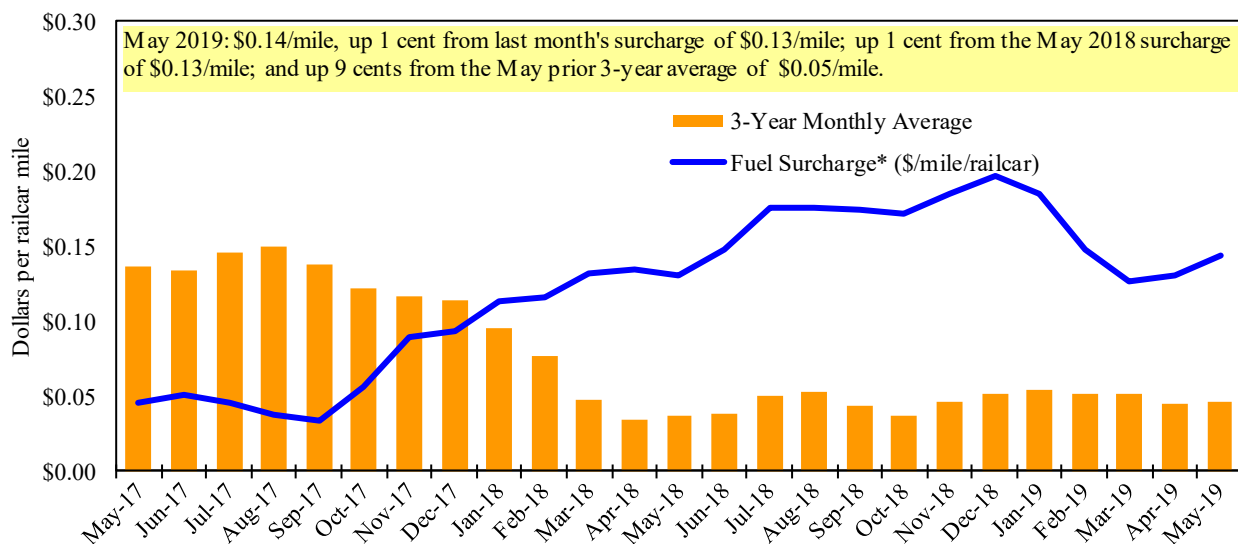
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage 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 Average¹

¹ 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.

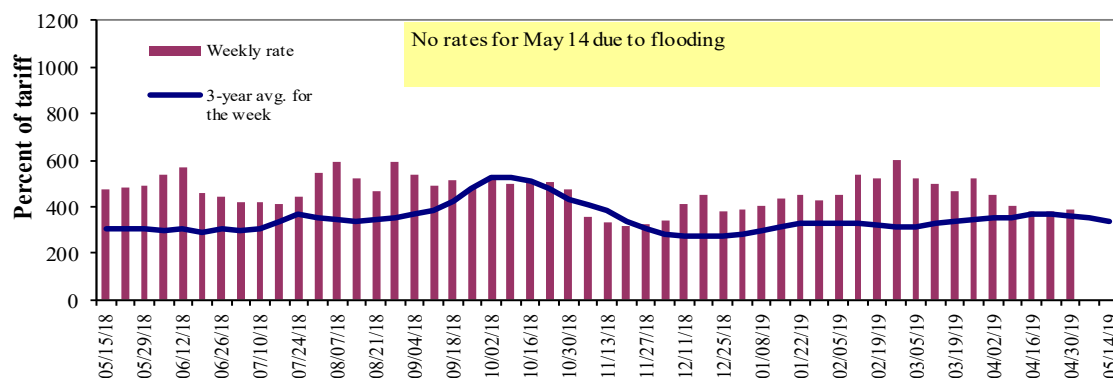
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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 ¹	5/14/2019	-	-	-	-	338	338	275
	5/7/2019	-	-	-	-	375	375	273
\$/ton	5/14/2019	-	-	-	-	15.85	13.66	8.64
	5/7/2019	-	-	-	-	17.59	15.15	8.57
Current week % change from the same week:								
	Last year	-	-	-	-	-4	-4	-4
	3-year avg. ²	-	-	-	-	33	33	21
Rate ¹	June	425	400	400	295	300	300	263
	August	425	400	400	295	350	350	288

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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.

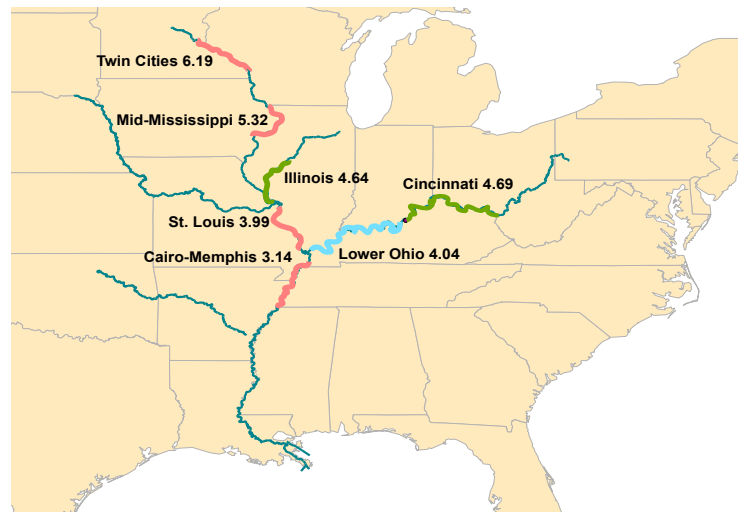
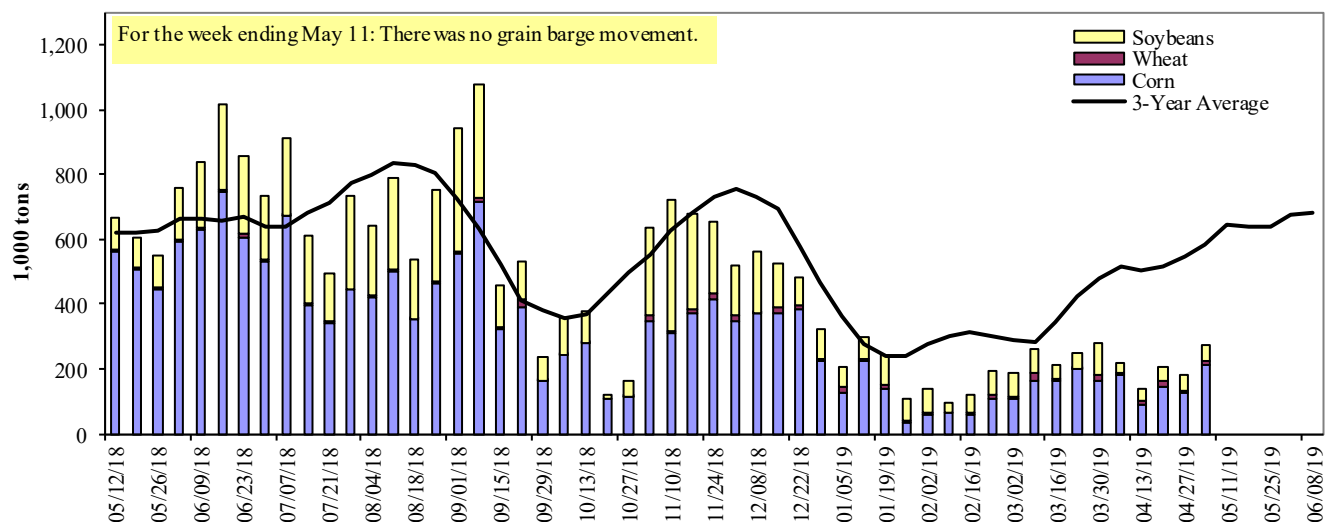


Figure 10

Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)

¹ 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 05/11/2019	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	3	0	3
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	0	0	0	0	0
Granite City, IL (L27)	0	0	0	0	0
Illinois River (L8)					
Ohio River (OLMSTED)	223	27	111	9	370
Arkansas River (L1)	0	0	0	0	0
Weekly total - 2019	223	27	111	9	370
Weekly total - 2018	664	13	156	2	835
2019 YTD ¹	4,544	829	3,398	60	8,830
2018 YTD ¹	7,064	567	3,874	56	11,561
2019 as % of 2018 YTD	64	146	88	107	76
Last 4 weeks as % of 2018 ²	49	112	67	197	57
Total 2018	23,349	1,674	12,819	133	37,975

¹ 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.

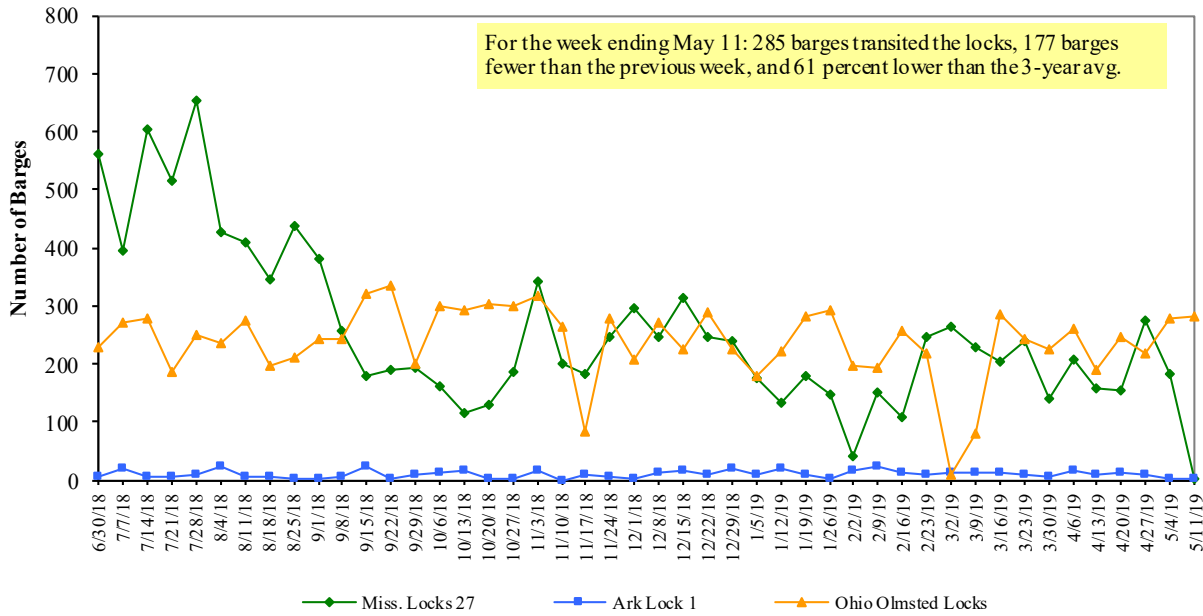
² As a percent of same period in 2018.

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.

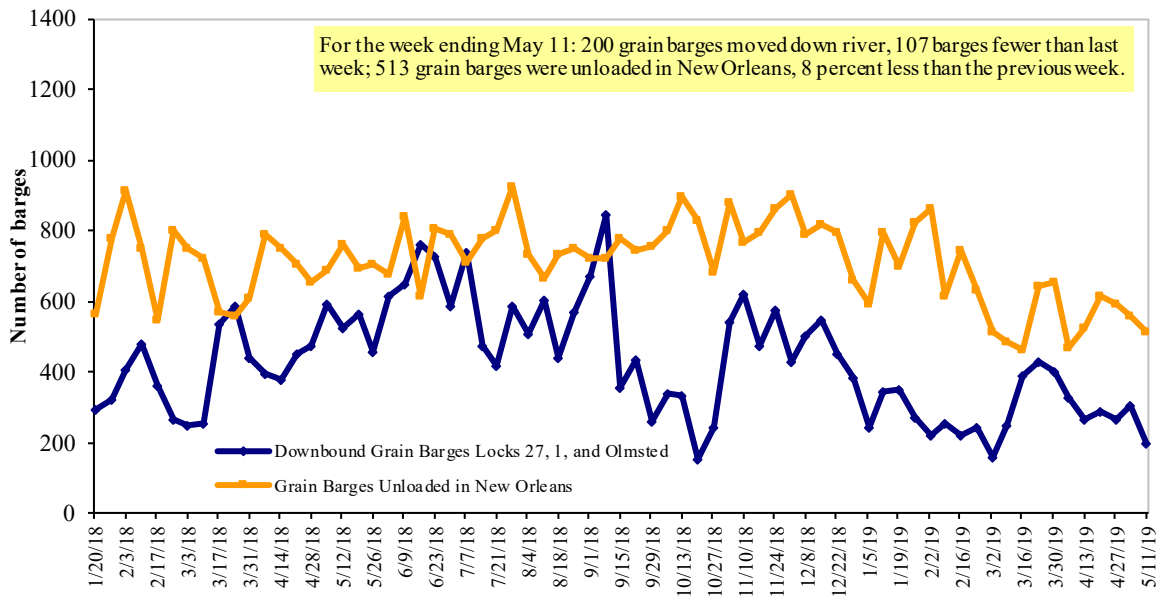
Source: U.S. Army Corps of Engineers

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 5/13/2019 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.176	-0.014	-0.060
	New England	3.238	-0.007	-0.013
	Central Atlantic	3.365	-0.014	-0.015
	Lower Atlantic	3.035	-0.016	-0.097
II	Midwest	3.046	-0.018	-0.129
III	Gulf Coast	2.905	-0.022	-0.107
IV	Rocky Mountain	3.181	-0.005	-0.135
V	West Coast	3.790	0.025	0.059
	West Coast less California	3.355	0.010	-0.127
	California	4.136	0.039	0.207
Total	U.S.	3.160	-0.011	-0.079

¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

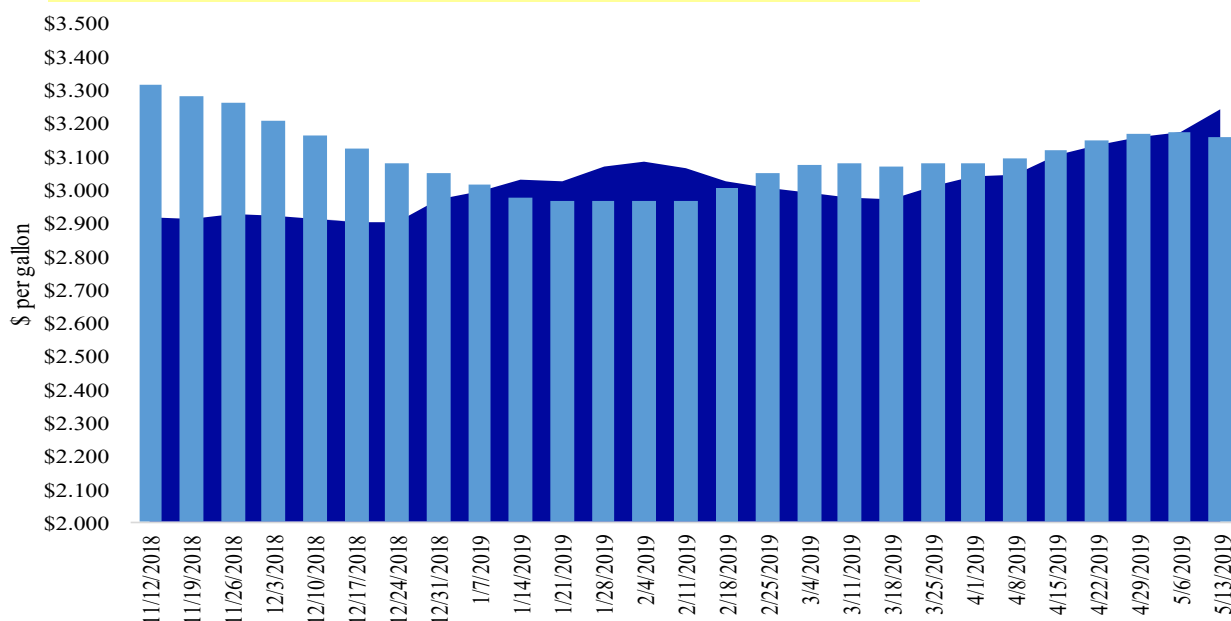
Source: Energy Information Administration/U.S. Department of Energy (www.eia.doe.gov)

Figure 13

Weekly Diesel Fuel Prices, U.S. Average

For the week ending May 13, the U.S. average diesel fuel price decreased 1.1 cents from the previous week to \$3.16 per gallon, 7.9 cents below the same week last year.

■ Last Year ■ Current Year
\$3.239 \$3.160



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			
Export Balances¹									
5/2/2019	1,954	651	837	736	59	4,237	10,328	12,118	26,684
This week year ago	633	381	830	701	22	2,565	19,002	11,168	32,735
Cumulative exports-marketing year²									
2018/19 YTD	7,335	2,730	6,144	4,658	448	21,315	36,017	32,870	90,202
2017/18 YTD	8,618	2,140	5,259	4,574	383	20,973	32,629	43,957	97,560
YTD 2018/19 as % of 2017/18	85	128	117	102	117	102	110	75	92
Last 4 wks as % of same period 2017/18	357	194	127	122	316	194	60	114	89
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

¹ Current unshipped (outstanding) export sales to date

² 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 Importers¹ of U.S. Corn

For the week ending 5/02/2019	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2015-2017
	2019/20	2018/19	2017/18		
	Next MY	Current MY	Last MY		
- 1,000 mt -					
Mexico	1,616	14,709	13,127	12	13,691
Japan	540	10,404	9,437	10	11,247
Korea	0	3,695	4,244	(13)	4,754
Colombia	5	4,051	3,929	3	4,678
Peru	0	1,992	2,602	(23)	2,975
Top 5 Importers	2,161	34,850	33,338	5	37,344
Total US corn export sales	2,249	46,345	51,631	(10)	53,184
% of Projected	4%	79%	83%		
Change from prior week ²	7	288	696		
Top 5 importers' share of U.S. corn export sales	96%	75%	65%		70%
USDA forecast, May 2019	57,888	58,524	62,036	(6)	
Corn Use for Ethanol USDA forecast, May 2019	139,700	138,430	142,367	(3)	

(n) indicates negative number.

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

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

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

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 5/02/2019	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2015-2017
	2019/20	2018/19	2017/18		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	63	13,271	28,739	(54)	31,228
Mexico	0	4,688	4,052	16	3,716
Indonesia	2	1,807	1,973	(8)	2,250
Japan	106	2,175	1,881	16	2,145
Netherlands	0	1,970	1,405	40	2,209
Top 5 importers	170	23,912	38,050	(37)	41,549
Total US soybean export sales	1,115	44,988	55,125	(18)	55,113
% of Projected	2%	93%	95%		
Change from prior week ²	296	(149)	354		
Top 5 importers' share of U.S. soybean export sales	15%	53%	69%		75%
USDA forecast, May 2019	53,134	48,365	58,011	83	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.² 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 sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 5/02/2019	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg 2015-2017
	2019/20	2018/19	2017/18		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
Mexico	254	3,288	2,952	11	2,781
Japan	133	2,742	2,899	(5)	2,649
Philippines	467	3,158	2,545	24	2,441
Korea	123	1,584	1,485	7	1,257
Nigeria	272	1,631	1,187	37	1,254
Indonesia	0	1,332	1,141	17	1,076
Taiwan	74	1,107	1,136	(3)	1,066
China	0	42	900	(95)	944
Colombia	94	654	389	68	714
Thailand	158	747	664	12	618
Top 10 importers	1,574	16,283	15,298	6	14,800
Total US wheat export sales	2,558	25,552	23,539	9	22,869
% of Projected	10%	101%	96%		
Change from prior week ²	412	91	35		
Top 10 importers' share of U.S. wheat export sales	62%	64%	65%		65%
USDA forecast, May 2019	24,523	25,204	24,550	3	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.² 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 sales³ 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 05/09/19	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.	
Pacific Northwest									
Wheat	462	311	149	5,208	4,393	119	135	122	13,315
Corn	404	316	128	5,007	7,720	65	73	106	20,024
Soybeans	0	0	n/a	4,018	4,100	98	16	22	7,719
Total	866	627	138	14,233	16,213	88	85	104	41,058
Mississippi Gulf									
Wheat	210	106	198	2,031	1,690	120	172	172	3,896
Corn	431	453	95	10,084	12,414	81	68	78	33,735
Soybeans	412	451	91	9,318	9,205	101	113	155	28,124
Total	1,053	1,011	104	21,433	23,309	92	86	102	65,755
Texas Gulf									
Wheat	177	73	244	2,355	1,595	148	284	200	3,198
Corn	0	28	0	272	216	126	178	161	730
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	69
Total	177	101	176	2,628	1,811	145	263	194	3,997
Interior									
Wheat	25	30	84	600	542	111	133	144	1,614
Corn	141	162	87	2,598	2,951	88	77	85	8,650
Soybeans	123	122	101	2,407	2,299	105	98	133	6,729
Total	289	314	92	5,605	5,792	97	89	106	16,993
Great Lakes									
Wheat	12	46	26	168	160	105	92	106	894
Corn	0	0	n/a	0	93	0	0	0	404
Soybeans	0	0	n/a	43	0	n/a	n/a	0	1,192
Total	12	46	26	210	253	83	55	67	2,491
Atlantic									
Wheat	0	0	n/a	32	64	51	n/a	0	69
Corn	7	0	n/a	56	38	150	38	113	138
Soybeans	5	62	9	507	917	55	44	81	2,047
Total	12	62	20	596	1,019	58	43	73	2,253
U.S. total from ports*									
Wheat	887	566	157	10,394	8,444	123	155	141	22,986
Corn	983	960	102	18,017	23,432	77	70	87	63,682
Soybeans	540	635	85	16,293	16,521	99	87	120	45,879
Total	2,410	2,160	112	44,704	48,398	92	89	106	132,547

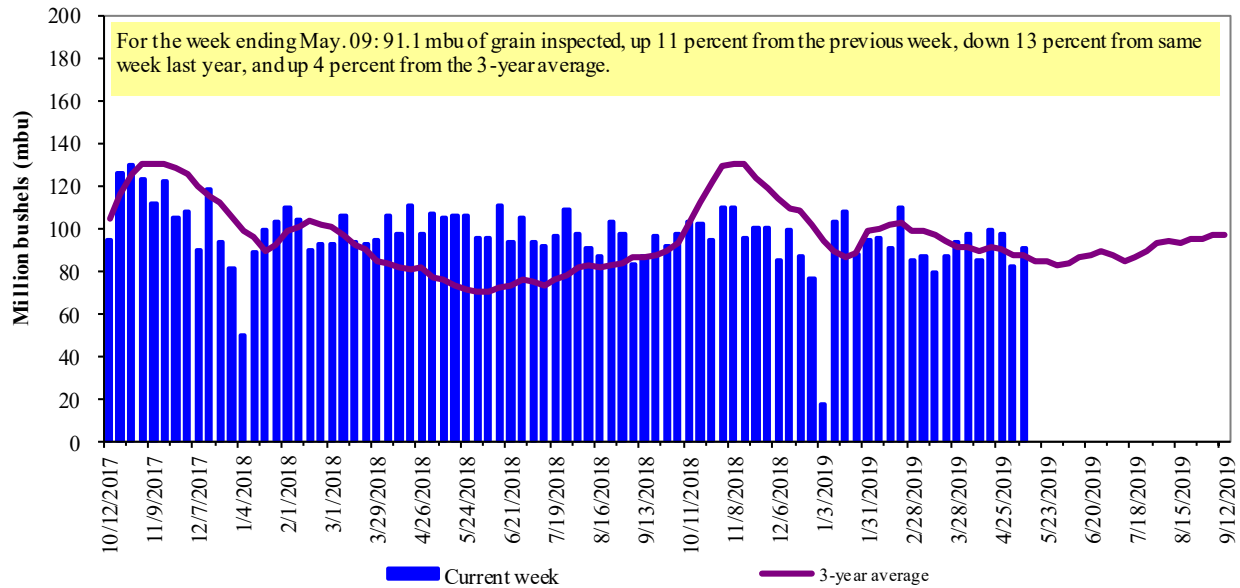
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

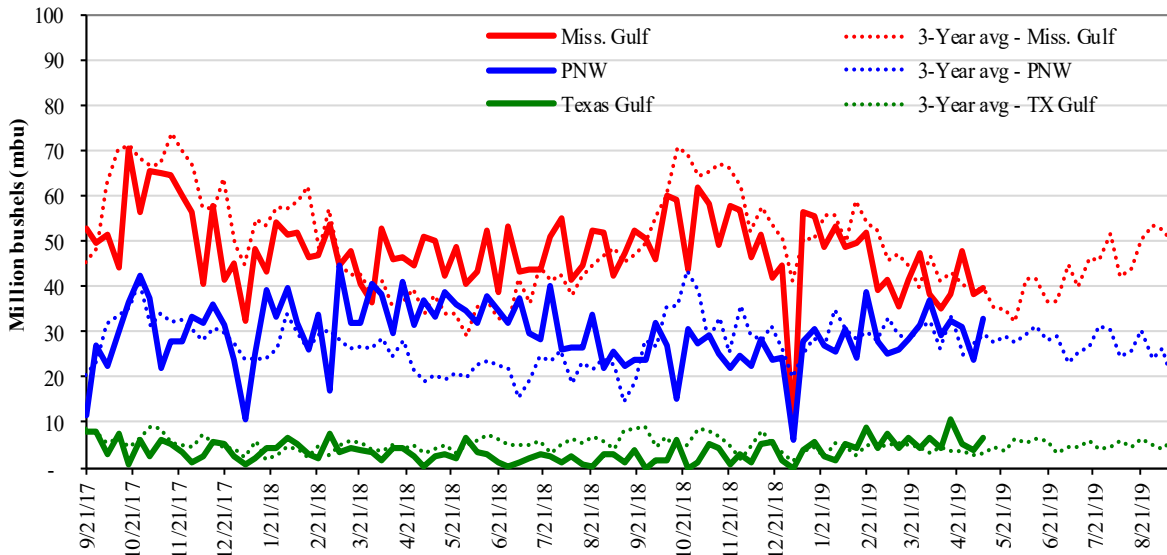


Source: USDA/Federal Grain Inspection Service (www.gipsa.usda.gov/fgis)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



<u>Week ending 05/09/19 inspections (mbu):</u>	<u>Percent change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Mississippi Gulf: 39.8	Last Week:	up 4	up 72	up 10	up 38
PNW: 32.9	Last Year (same week):	down 21	up 138	down 12	down 2
Texas Gulf: 6.5	3-yr avg. (4-wk. mov. Avg):	down 2	up 91	up 5	up 14

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

Ocean Transportation

Table 17

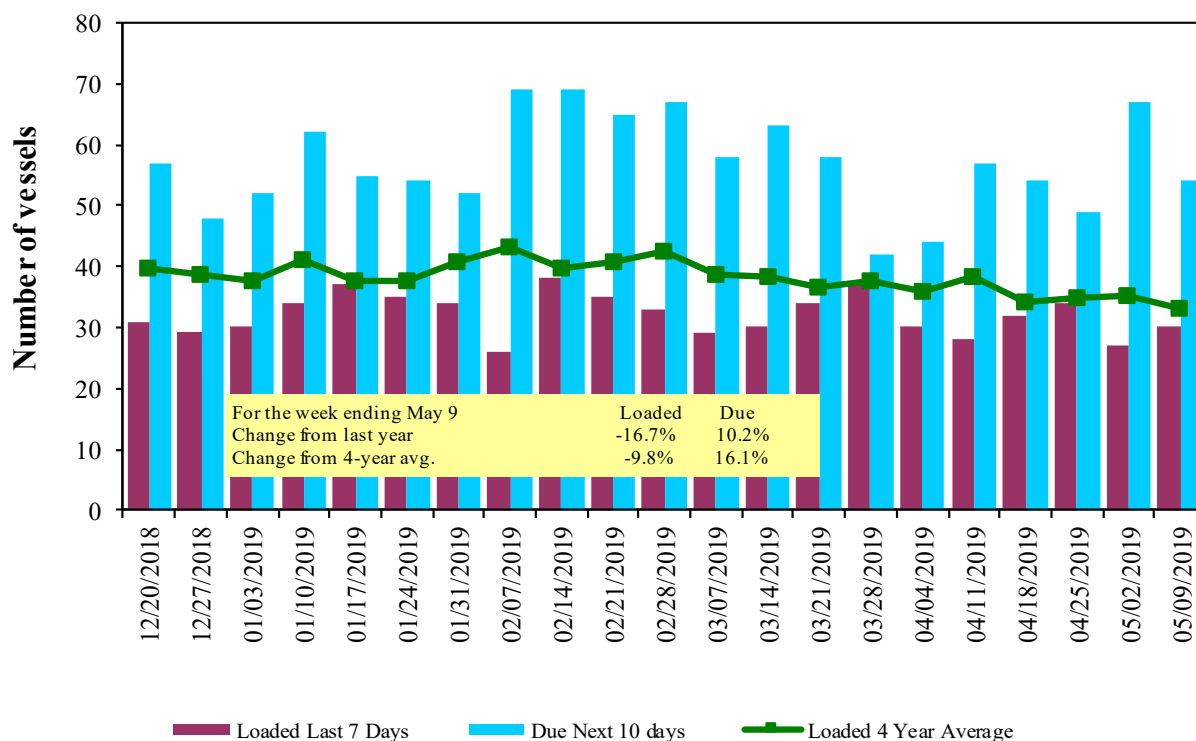
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
5/9/2019	37	30	54	11
5/2/2019	26	27	67	16
2018 range	(23..88)	(24..41)	(38..67)	(4..30)
2018 avg.	40	34	54	17

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

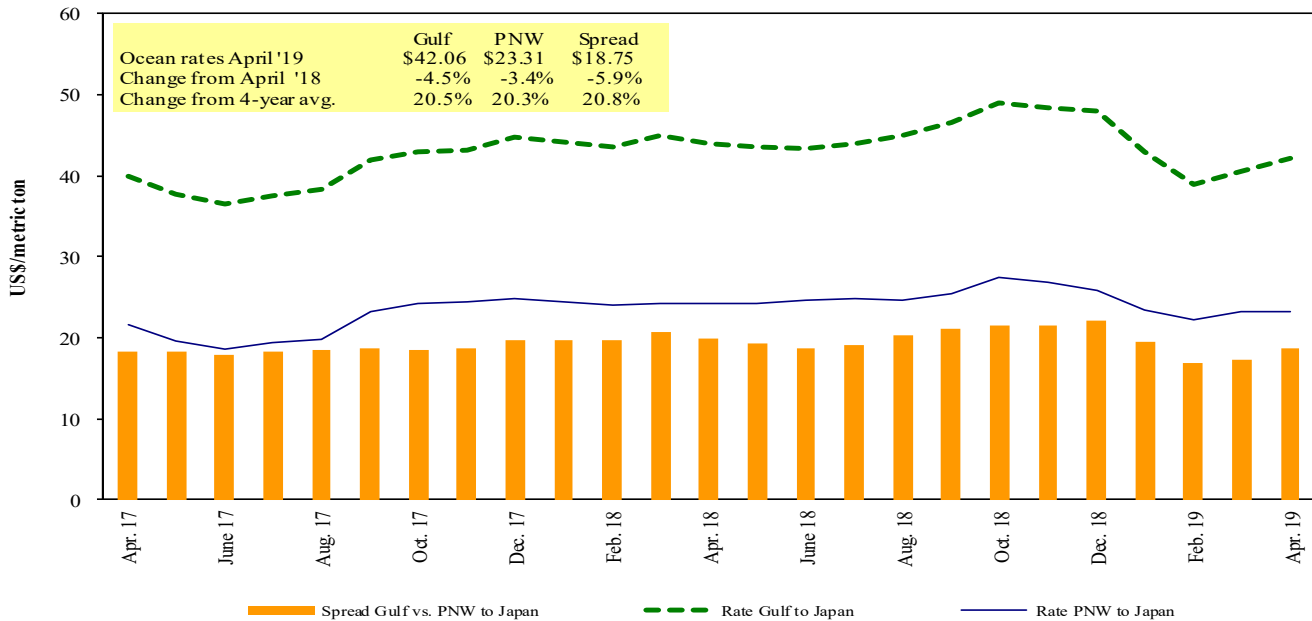
U.S. Gulf Vessel Loading Activity



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 05/11/2019

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*
Brazil	China	Heavy Grain	Apr 20/May 5	63,000	33.00
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
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

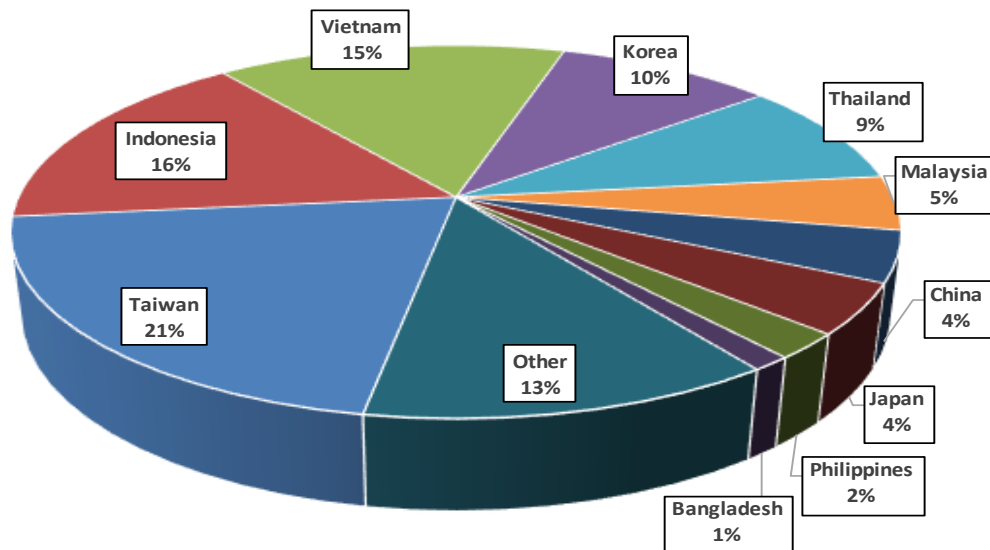
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, 2018

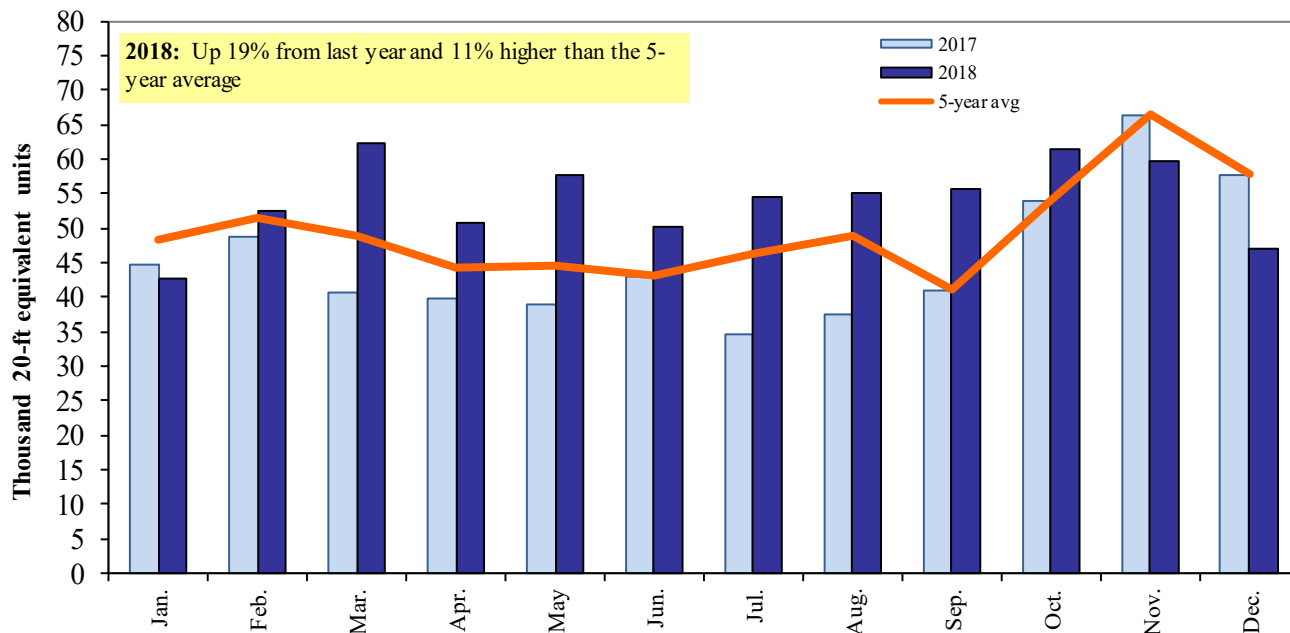


Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 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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