



# 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

Data Links

Specialists

Subscription  
Information

The next  
release is  
July 21, 2016

#### Gulf Vessel Loading Activity Getting Stronger

**Ocean-going grain vessel** loading activity in the U.S. Gulf is getting stronger. During the past 4 weeks, beginning on June 16 and ending on July 7, an average of 35 grain vessels were loaded per week, and an average of 54 vessels are expected during the next 10 days. However, during the prior 8 weeks, beginning on April 21 and ending on June 9, an average of 33 grain vessels were loaded per week, and an average of 49 vessels were expected during the next 10 days. Increased loading activity in the Gulf may be due to increased shipments of wheat as the wheat harvest is in progress in many States. Current projections from USDA's National Agricultural Statistics Service estimate that the winter wheat harvest will be 1.6 billion bushels, with a record yield of 53.9 bushels per acre. As of July 10, 66 percent of the winter wheat was harvested in the major growing States, slightly ahead of the 5-year average of 65 percent.

#### Mississippi Gulf Grain Inspections Highest Since March

For the week ending July 7, **total inspections of grain** (corn, wheat, soybeans) for export reached 2.12 million metric tons (mmt), up 7 percent from the previous week, up 43 percent from last year, and 54 percent above the 3-year average. Mississippi Gulf inspections reached 1.24 mmt, the highest since early March. Pacific Northwest (PNW) inspections, however, decreased 34 percent from the previous week, at .515 mmt. Soybean inspections jumped 94 percent from the previous week as shipments to Asia rebounded. Corn inspections increased 14 percent but wheat inspections dropped 34 percent. Outstanding export sales (unshipped) of wheat and soybeans were up, but corn export sales decreased.

#### Transportation Demand Expected to Increase with Large Crop Estimates.

Compared to the previous month's estimates, USDA's July [World Agricultural Supply and Demand Estimates](#) projects increases in production and exports of corn, wheat, and soybeans. Corn production is projected at 14.54 billion bushels which, if realized, would be a record. Corn exports are projected at 2.05 billion bushels, the highest in 10 years. Wheat production is projected at 2.26 billion bushels and exports at .93 billion bushels, the highest exports in 3 years. Production of soybeans is projected at 3.88 billion bushels and exports at 1.92 billion bushels, which, if achieved, would be an export record. Overall, the volume of this year's expected crops, especially export volumes, will likely increase transportation demand for the remainder of the year.

### Snapshots by Sector

#### **Export Sales**

During the week ending June 30, **unshipped balances** of wheat, corn, and soybeans totaled 25.4 mmt, up 54 percent from the same time last year. Net weekly **wheat export sales** were .825 mmt, up 28 from the previous week. Net **corn export sales** were .370 mmt, down 21 percent from the previous week, and net **soybean export sales** were .637 mmt, down 13 percent from the past week.

#### **Rail**

U.S. Class I railroads originated 23,248 **grain carloads** for the week ending July 2, up 5 percent from the previous week, up 26 percent from last year, and up 31 percent from the 3-year average.

Average July shuttle **secondary railcar bids/offers** per car were \$81 above tariff for the week ending July 7, unchanged from last week, and \$137 higher than last year. Average secondary non-shuttle secondary railcar bids/offers were \$25 above tariff, up \$25 from last week, and \$125 higher than last year.

#### **Barge**

For the week ending July 9, **barge grain movements** totaled 1,058,646 tons, 37 percent higher than last week, and up 45 percent from the same period last year.

For the week ending July 9, 687 grain barges **moved down river**, up 42 percent from last week; 815 grain barges were **unloaded in New Orleans**, up 64 percent from the previous week.

#### **Ocean**

For the week ending July 7, 32 **ocean-going grain vessels** were loaded in the Gulf, 7 percent more than the same period last year. Fifty-nine vessels are expected to be loaded within the next 10 days, 37 percent more than the same period last year.

For the week ending July 7, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$31.25 per metric ton, up 7 percent from the previous week. The cost of shipping from the PNW to Japan was \$17 per metric ton, up 6 percent from the previous week.

#### **Fuel**

During the week ending July 11, U.S. average **diesel fuel prices** fell 1 cent from previous week to \$2.41 per gallon, down \$0.40 from the same week last year.

# Feature Article/Calendar

## Reduced Competition for U.S. Corn Exporters May Pose an Opportunity for Barge Shippers

According to the USDA's July *World Agricultural Supply and Demand Estimates*, corn exports for the 2016/17 crop year are projected at 2.05 billion bushels, as reduced competition from Brazil will increase demand for U.S. corn. As of early June, total U.S. corn commitments (accumulated exports plus outstanding sales) have remained above last year's levels for the first time in the 2015/16 crop year. Brazil's export potential has been reduced by a decrease in corn production caused by adverse weather conditions in that country. Central Brazil experienced an early end to the rainy season, causing drought conditions that reduced yields. In addition, an early June frost in Parana (southern Brazil) adversely affected the second-crop corn. Historical data shows that barges can supply 47 to 73 percent of U.S. corn exports to coastal facilities for overseas markets.<sup>1</sup> Barges can supply 39 to 77 percent of U.S. soybean exports. This article looks at current and past trends in barge supply and their impact for rates.

**Figure 1: St. Louis export grain barge rates by week, 2016, average (2011-15)**

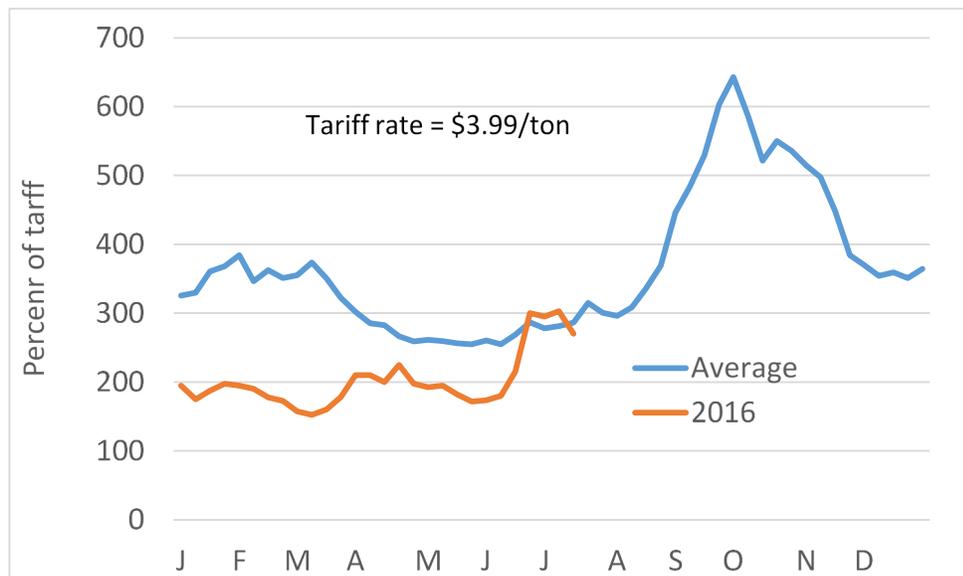


Figure 1 shows that for most of 2016, barge rates have been below average for exports destined from St. Louis to Gulf of Mexico. Only since late-June have barge rates returned to average levels. As of July 12, spot grain barge rates from St. Louis to Gulf of Mexico were about 270 percent of tariff (\$10.77 per ton). Cumulative year-to-date down-bound grain

tonnages at Mississippi River Locks 27 (near St. Louis) were 13.8 million tons, 54 percent higher than the 3-year average.

In recent weeks, barge grain tonnages have been increasing as more grain has been loaded onto barges on the Upper Mississippi and Illinois Rivers. For the 4 weeks ending July 9, a weekly average of 816,000 tons of grain have moved down-bound at Mississippi River Locks 27, nearly 100 percent more than the 3-year average for the comparable time period. The higher volumes being moved along with the current near average freight rates indicates barge supplies are adequate for the freight demand. Compared to last year, navigation conditions have not had an adverse impact on barge logistics. Last year at this time, portions of the Illinois River were closed for most of the last 2 weeks of June due to flooding. In addition, fuel costs have been lower than average, but lately fuel costs have been rising, so this advantage may be short-lived. Another factor that may be putting some counterbalancing downward pressure on barge rates in conjunction with the boosting effect of increased volumes is that the covered barge fleet has been increasing in recent years with new construction, and an unknown amount of

<sup>1</sup> Transportation of U.S. Grains: A Modal Share Analysis, June 2015. U.S. Dept. of Agriculture, Agricultural Marketing Service. Web. <http://dx.doi.org/10.9752/TS049.06-2015>

open coal barges that have reportedly been converted to covered barges for grain. Open barges are usually used to haul coal, but in recent years, demand for coal has been down due to cheaper and abundant natural gas supplies.

According to the U.S. Army Corps of Engineers (Corps), there were 26,174 dry cargo barges on the inland waterways in 2014.<sup>1</sup> Of this number, 10,243 were covered barges, the principal barge used to haul grain, while there were 8,545 open (not covered) barges. There were about 7,386 dry cargo barges used for other purposes, such as deck barges and barges used to transport containers. While 2015 data are not yet available from the Corps, barge industry representatives have indicated the current covered barge fleet may be in the 12,000 to 13,000 range (due to both conversions and new construction).

**Table 1: Quarterly barge rate from St. Louis to New Orleans, 2011-2015.**

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
	Percent of tariff (100 = \$3.99 per ton)			
2011	423	329	365	332
2012	284	240	449	530
2013	262	222	357	517
2014	457	247	519	542
2015	320	300	344	289
2016	181	209	-	-
Average 2011-2015	349	268	407	442

From 2011 to 2015, first to second quarter rates decreased, and second to third quarter rates increased (). However, for 2016, there was a slight increase from the first to second quarter. For the third to fourth quarter, there were mixed outcomes, with increases in 2012, 2013, and 2014, and decreases in 2011 and 2015. Generally, the highest barge rates occur in the fourth quarter as newly harvested grain can be sold directly into the export

market. However, in 2011, flooding reduced the demand for barge services, and lowered rates in the fourth quarter of that year. Also, in 2015, there were significantly lower fourth quarter rates as weaker export demand for U.S products reduced barge demand.

**Table 2: Average St. Louis barge rate for September, by week (2011-2015)**

September	Rate as percent of tariff	Rate per ton
Week 1	484	\$19.30
Week 2	529	\$21.12
Week 3	603	\$24.04
Week 4	643	\$25.66
Average	565	\$22.53

For shippers buying freight for future movements, barge operators are offering St. Louis rates for September 2016 at 475 to 500 percent of tariff (\$18.95 to \$19.95 per ton). The 5-year average St. Louis rate for September is 565 percent of tariff (\$22.53 per ton), however, September is a pivotal month for barge rates. Table 2 shows that, on average, from 2011 to 2015, there were significant weekly increases as the month progressed. By September, the corn and soybean harvest was underway and the barge supply gets tighter and rates increase. In some years, the harvest progress may be delayed due to extended rain events. With those delays, barge demand is interrupted and rates may not increase as expected. Conversely, during an early harvest where

there is a large span of rainless days during harvest, the barge demand can increase and cause a sooner than expected barge rate increase.

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<sup>1</sup> U.S. Army Corps of Engineers, Waterborne Transportation Lines of the United States. Last Retrieved 04/13/2016. [http://www.navigationdatacenter.us/veslchar/pdf/wtlusv11\\_13.pdf](http://www.navigationdatacenter.us/veslchar/pdf/wtlusv11_13.pdf)

# 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
07/13/16	162	256	207	215	140	121
07/06/16	163	255	207	252	131	113

<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)**

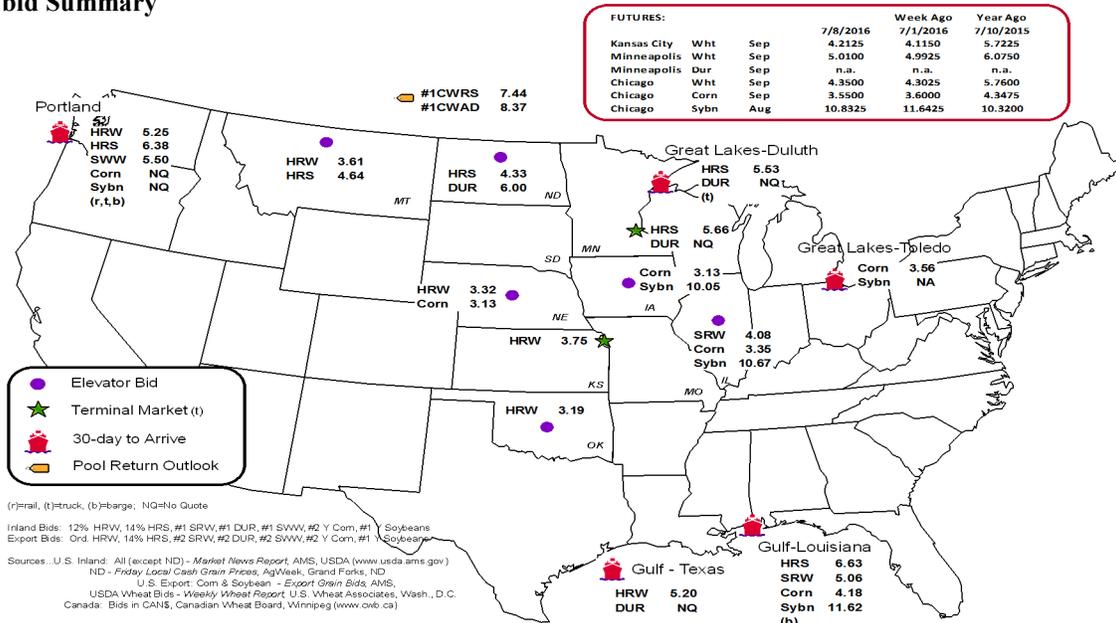
Commodity	Origin--Destination	7/8/2016	7/1/2016
Corn	IL--Gulf	-0.83	-0.83
Corn	NE--Gulf	-1.05	-1.10
Soybean	IA--Gulf	-1.57	-1.64
HRW	KS--Gulf	-1.45	-1.42
HRS	ND--Portland	-2.05	-1.95

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>

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
7/06/2016 <sup>p</sup>	38	698	4,798	228	5,762	7/2/2016	2,342
6/29/2016 <sup>r</sup>	119	1,691	5,097	151	7,058	6/25/2016	2,215
2016 YTD <sup>r</sup>	6,320	39,526	133,549	9,840	189,235	2016 YTD	55,447
2015 YTD <sup>r</sup>	11,792	35,139	117,860	13,699	178,490	2015 YTD	47,786
2016 YTD as % of 2015 YTD	54	112	113	72	106	% change YTD	116
Last 4 weeks as % of 2015 <sup>2</sup>	45	201	160	53	153	Last 4wks % 2015	106
Last 4 weeks as % of 4-year avg. <sup>2</sup>	90	144	181	91	157	Last 4wks % 4 yr	129
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

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

<sup>2</sup> Compared with same 4-weeks in 2015 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.

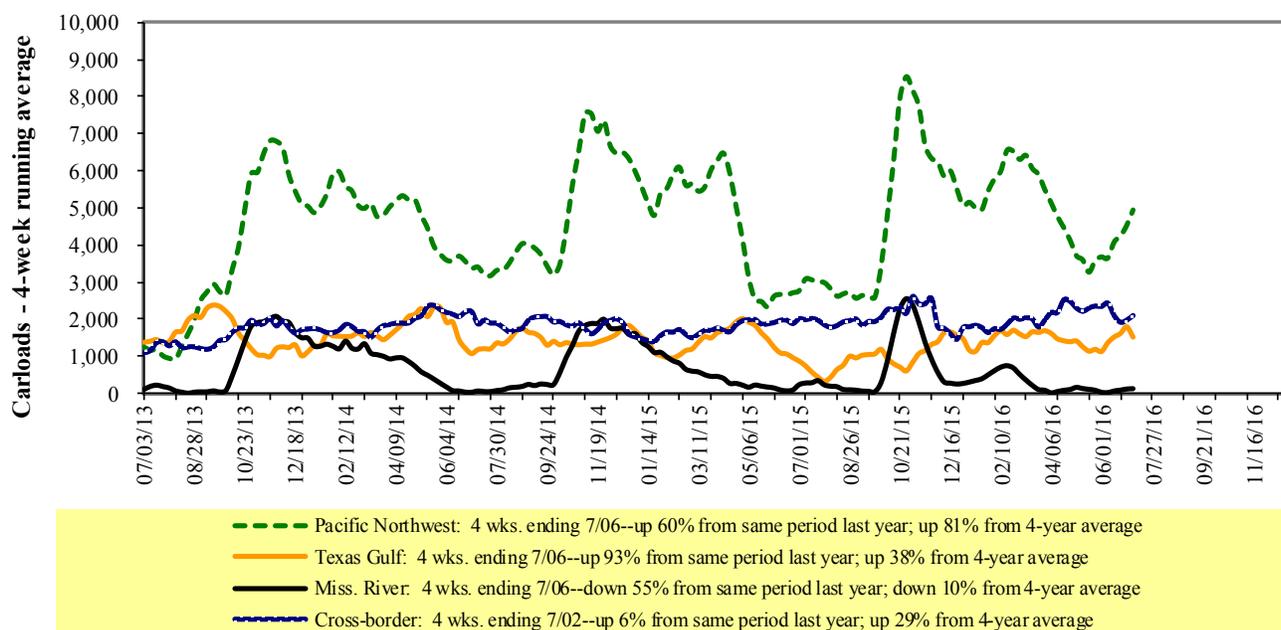
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 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 Programs/AMS/USDA

Table 4

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

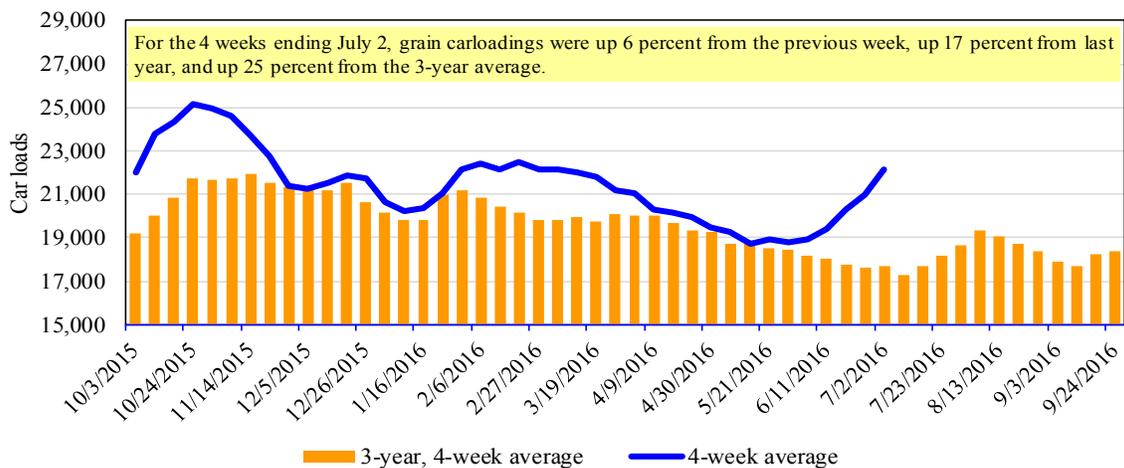
For the week ending: 7/2/2016	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,449	3,451	12,093	852	5,403	23,248	2,806	4,147
This week last year	1,725	2,572	8,687	1,101	4,320	18,405	3,254	4,039
2016 YTD	46,791	72,626	266,736	22,329	135,232	543,714	82,553	111,108
2015 YTD	53,390	78,795	255,209	23,033	133,942	544,369	107,192	114,289
2016 YTD as % of 2015 YTD	88	92	105	97	101	100	77	97
Last 4 weeks as % of 2015*	79	108	140	73	105	117	69	92
Last 4 weeks as % of 3-yr avg.**	89	110	146	98	114	125	73	87
Total 2015	104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

\*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: 7/7/2016		Delivery period							
		Jul-16	Jul-15	Aug-16	Aug-15	Sep-16	Sep-15	Oct-16	Oct-15
BNSF <sup>3</sup>	COT grain units	2	4	13	14	9	19	17	34
	COT grain single-car <sup>5</sup>	0..57	0..22	101..250	0	81..102	0..2	90..108	0..5
UP <sup>4</sup>	GCAS/Region 1	no bids	no offer	no bids	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	no bids	no offer	no bids	no bids	12	no bids	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.

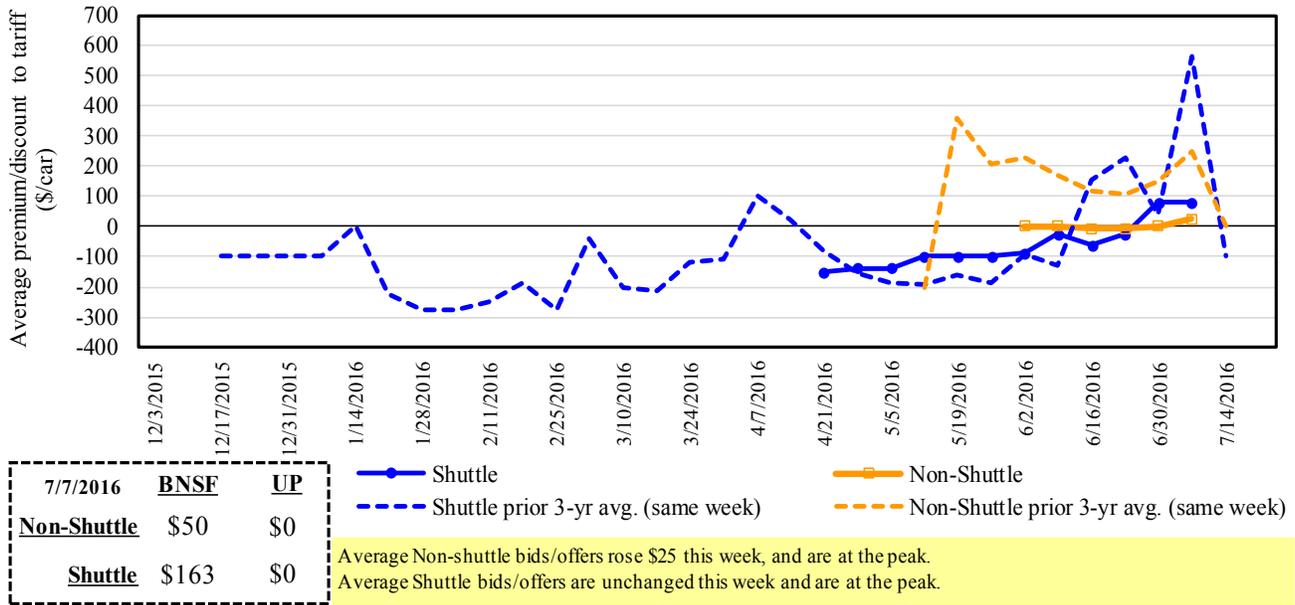
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

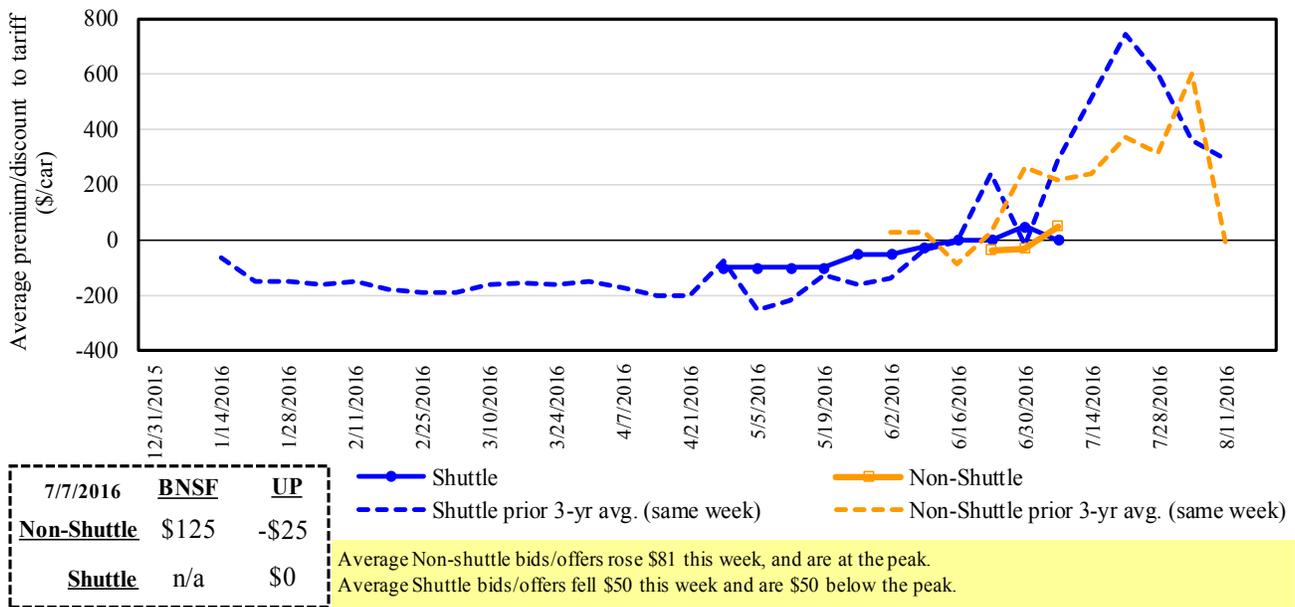
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

**Figure 4**  
**Bids/Offers for Railcars to be Delivered in July 2016, Secondary Market**



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

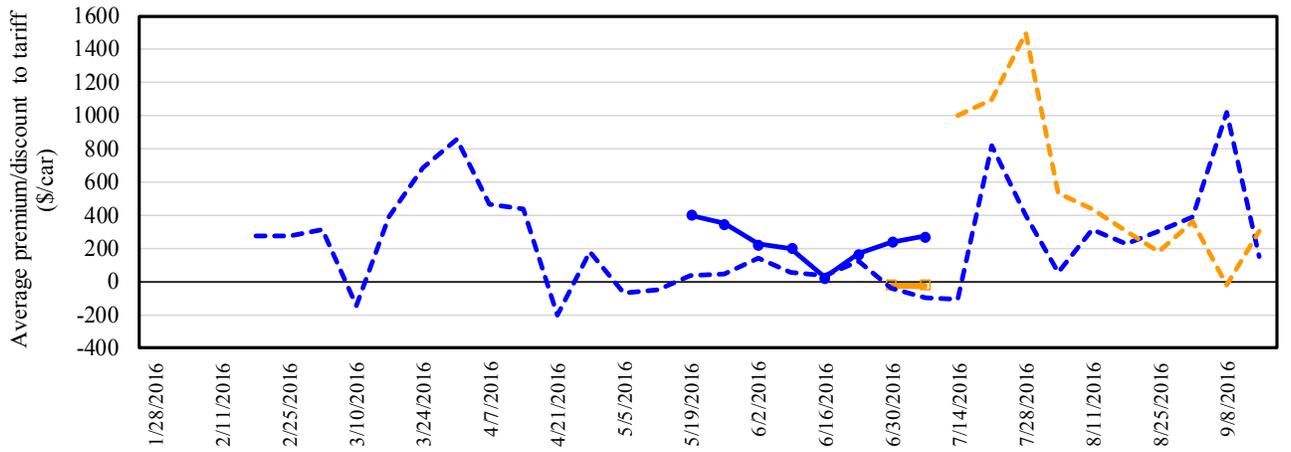
**Figure 5**  
**Bids/Offers for Railcars to be Delivered in August 2016, Secondary Market**



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 September 2016, Secondary Market**



7/7/2016			BNSF		UP	
Non-Shuttle	n/a	-\$25				
Shuttle	\$494	\$50				

—●— Shuttle  
- - - Shuttle prior 3-yr avg. (same week)  
—■— Non-Shuttle  
- - - Non-Shuttle prior 3-yr avg. (same week)

Average Non-shuttle bids/offers are unchanged this week, and are at the peak.  
 Average Shuttle bids/offers rose \$33 this week and are \$128 below the peak.

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>**

For the week ending:		Delivery period					
		7/7/2016	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16
Non-shuttle	BNSF-GF	50	125	n/a	n/a	n/a	n/a
	Change from last week	n/a	175	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	0	(25)	(25)	n/a	n/a	n/a
	Change from last week	0	(12)	0	n/a	n/a	n/a
	Change from same week 2015	100	50	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	163	n/a	494	n/a	n/a	(13)
	Change from last week	25	n/a	166	n/a	n/a	13
	Change from same week 2015	92	n/a	494	n/a	n/a	n/a
	UP-Pool	0	0	50	300	n/a	n/a
	Change from last week	(25)	(50)	(100)	(150)	n/a	n/a
	Change from same week 2015	183	250	250	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

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>
7/1/2016	metric ton					bushel <sup>2</sup>		
<b>Unit train</b>								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$25	\$36.05	\$0.98	-2	
	Grand Forks, ND	Duluth-Superior, MN	\$3,463	-\$12	\$34.27	\$0.93	-17	
	Wichita, KS	Los Angeles, CA	\$6,950	-\$61	\$68.41	\$1.86	-3	
	Wichita, KS	New Orleans, LA	\$4,243	\$45	\$42.58	\$1.16	-2	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$50	\$63.91	\$1.74	-3	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$49	\$45.28	\$1.23	-2	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$68	\$47.45	\$1.29	-3	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$50	\$37.05	\$0.94	7	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	9	
	Des Moines, IA	Davenport, IA	\$2,168	\$11	\$21.64	\$0.55	-1	
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$49.69	\$1.26	5	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	5	
Soybeans	Des Moines, IA	Little Rock, AR	\$3,444	\$31	\$34.51	\$0.88	2	
	Des Moines, IA	Los Angeles, CA	\$5,052	\$91	\$51.07	\$1.30	0	
	Minneapolis, MN	New Orleans, LA	\$3,719	\$8	\$37.01	\$1.01	-4	
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	8	
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	10	
Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	4		
Champaign-Urbana, IL	New Orleans, LA	\$4,395	\$50	\$44.14	\$1.20	8		
<b>Shuttle Train</b>								
Wheat	Great Falls, MT	Portland, OR	\$3,853	-\$35	\$37.91	\$1.03	-6	
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$27	\$38.17	\$1.04	-4	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	16	
	Grand Forks, ND	Portland, OR	\$5,511	-\$61	\$54.12	\$1.47	-5	
	Grand Forks, ND	Galveston-Houston, TX	\$5,831	-\$63	\$57.28	\$1.56	-14	
	Northwest KS	Portland, OR	\$5,478	\$80	\$55.19	\$1.50	-3	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$74	\$48.92	\$1.24	-8
Sioux Falls, SD		Tacoma, WA	\$4,960	-\$68	\$48.58	\$1.23	-8	
Champaign-Urbana, IL		New Orleans, LA	\$3,481	\$50	\$35.07	\$0.89	7	
Lincoln, NE		Galveston-Houston, TX	\$3,600	-\$40	\$35.36	\$0.90	-4	
Des Moines, IA		Amarillo, TX	\$3,795	\$39	\$38.08	\$0.97	0	
Minneapolis, MN		Tacoma, WA	\$5,000	-\$73	\$48.92	\$1.24	-8	
Council Bluffs, IA		Stockton, CA	\$4,640	-\$76	\$45.32	\$1.15	-5	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	-\$68	\$53.85	\$1.47	-7	
	Minneapolis, MN	Portland, OR	\$5,510	-\$74	\$53.98	\$1.47	-8	
	Fargo, ND	Tacoma, WA	\$5,380	-\$60	\$52.83	\$1.44	-7	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$58	\$44.52	\$1.21	-3	
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	10	
Grand Island, NE	Portland, OR	\$5,360	\$82	\$54.04	\$1.47	-3		

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

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

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

\*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel surcharge per car <sup>2</sup>	Tariff plus surcharge per:		Percent change <sup>4</sup> Y/Y
					metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	-4
	OK	Cuautitlan, EM	\$6,514	\$35	\$66.91	\$1.82	-5
	KS	Guadalajara, JA	\$6,995	\$84	\$72.33	\$1.97	-4
	TX	Salinas Victoria, NL	\$4,142	\$20	\$42.52	\$1.16	0
Corn	IA	Guadalajara, JA	\$8,137	\$78	\$83.93	\$2.13	-6
	SD	Celaya, GJ	\$7,480	\$0	\$76.43	\$1.94	-6
	NE	Querretaro, QA	\$7,879	\$66	\$81.18	\$2.06	0
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	6
	MO	Tlalnepantla, EM	\$7,238	\$64	\$74.61	\$1.89	1
	SD	Torreon, CU	\$7,080	\$0	\$72.34	\$1.84	-2
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$79	\$89.21	\$2.43	1
	NE	Guadalajara, JA	\$9,142	\$82	\$94.25	\$2.56	0
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	0
	KS	Torreon, CU	\$7,439	\$58	\$76.60	\$2.08	1
Sorghum	NE	Celaya, GJ	\$7,344	\$71	\$75.76	\$1.92	-3
	KS	Querretaro, QA	\$7,563	\$44	\$77.72	\$1.97	2
	NE	Salinas Victoria, NL	\$6,168	\$35	\$63.37	\$1.61	2
	NE	Torreon, CU	\$6,672	\$56	\$68.74	\$1.74	-2

<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.

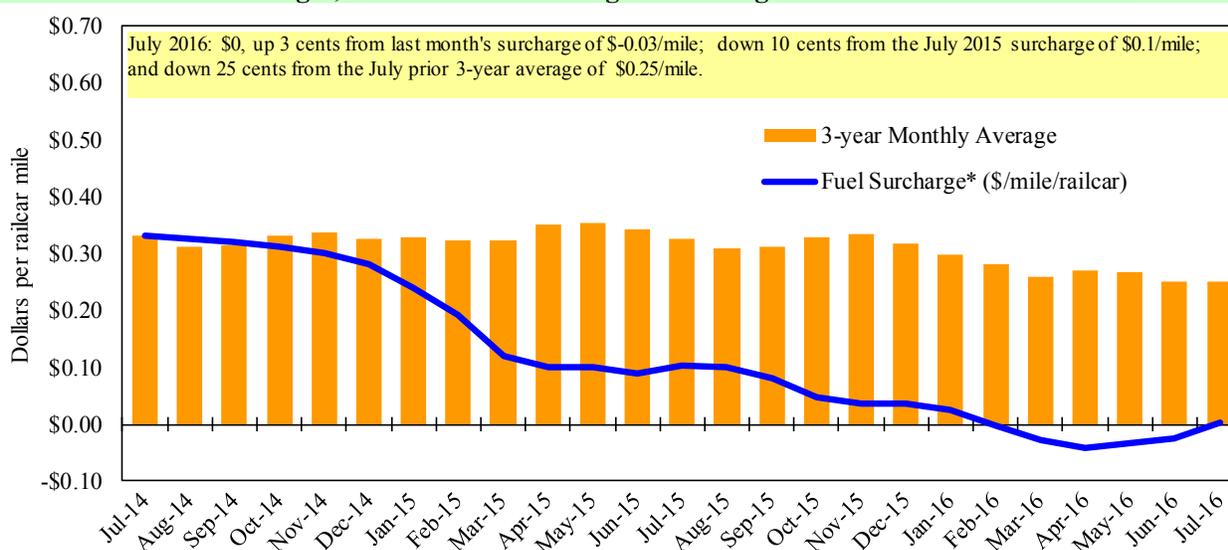
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

<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.

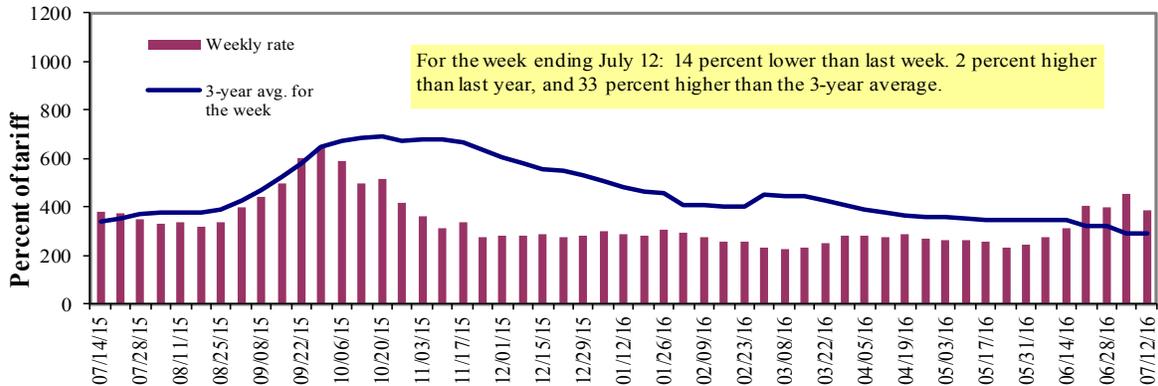
\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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 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>	7/12/2016	455	413	388	270	270	270	233
	7/5/2016	475	458	453	303	315	315	263
<b>\$/ton</b>	7/12/2016	28.16	21.97	18.00	10.77	12.66	10.91	7.32
	7/5/2016	29.40	24.37	21.02	12.09	14.77	12.73	8.26
<b>Current week % change from the same week:</b>								
	Last year	-4	4	2	0	-15	-15	-1
	3-year avg. <sup>2</sup>	-2	31	33	1	2	2	6
<b>Rate<sup>1</sup></b>	August	475	430	420	378	375	375	343
	October	613	550	530	425	500	500	463

<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:

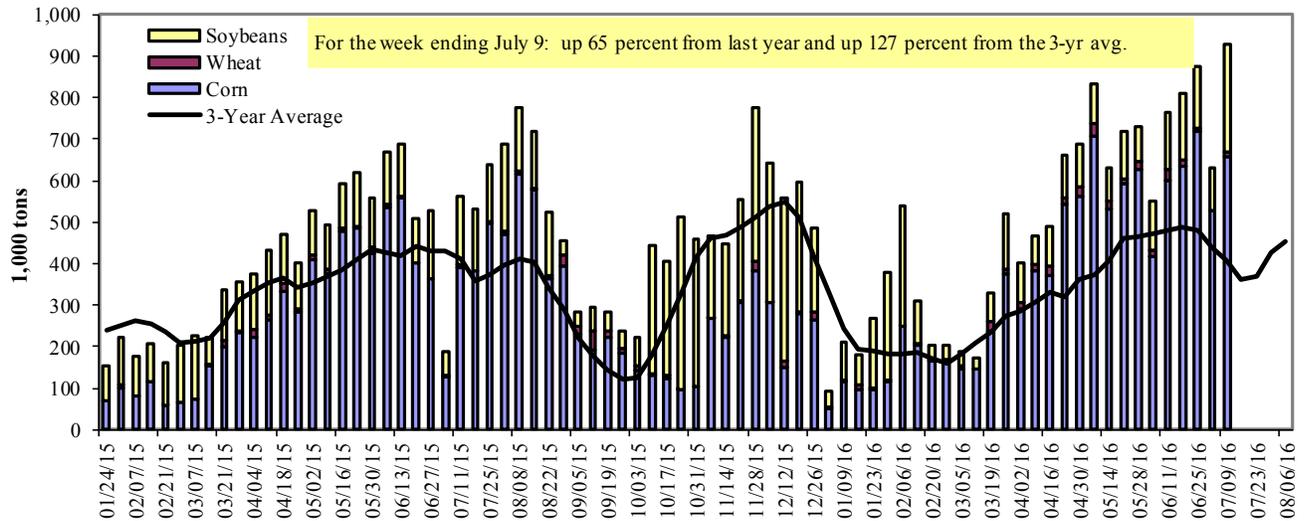
(Rate \* 1976 tariff benchmark rate per ton)/100

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)**

For the week ending 7/09/2016	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	323	11	156	0	490
Winfield, MO (L25)	401	13	188	2	603
Alton, IL (L26)	638	14	231	2	884
Granite City, IL (L27)	658	13	258	2	929
<b>Illinois River (L8)</b>	158	0	66	0	224
<b>Ohio River (L52)</b>	27	20	38	2	86
<b>Arkansas River (L1)</b>	0	41	3	0	43
Weekly total - 2016	684	73	298	3	1,059
Weekly total - 2015	451	68	211	2	731
2016 YTD <sup>1</sup>	12,928	1,069	5,385	168	19,550
2015 YTD	11,070	800	5,526	125	17,521
2016 as % of 2015 YTD	117	134	97	134	112
Last 4 weeks as % of 2015 <sup>2</sup>	153	125	124	145	143
Total 2015	19,215	1,686	14,191	359	35,451

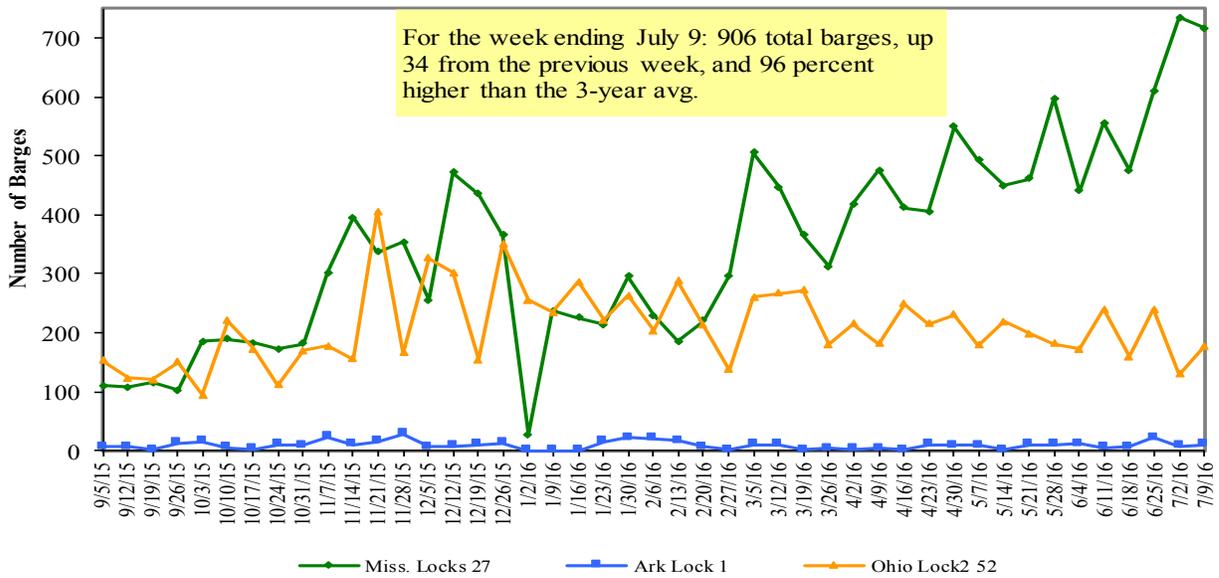
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

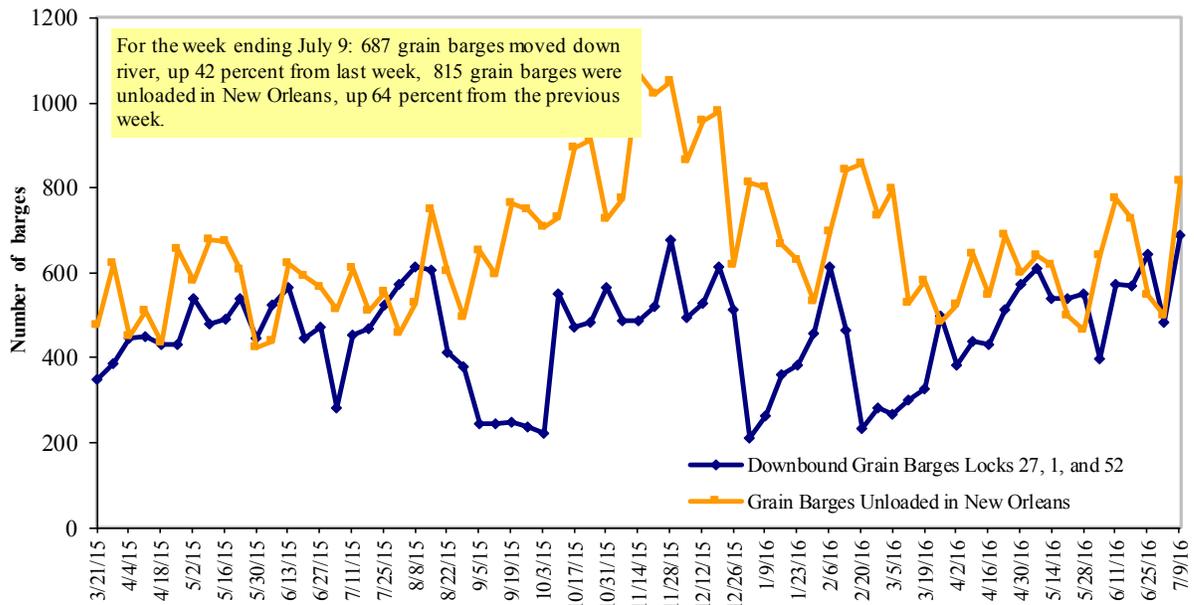
Source: U.S. Army Corps of Engineers

**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 7/11/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.424	-0.014	-0.491
	New England	2.469	-0.013	-0.560
	Central Atlantic	2.521	-0.014	-0.517
	Lower Atlantic	2.341	-0.014	-0.456
II	Midwest <sup>2</sup>	2.385	-0.004	-0.319
III	Gulf Coast <sup>3</sup>	2.261	-0.021	-0.447
IV	Rocky Mountain	2.445	0.009	-0.342
V	West Coast	2.708	-0.001	-0.329
	West Coast less California	2.596	-0.003	-0.323
	California	2.798	0.000	-0.335
Total	U.S.	2.414	-0.009	-0.400

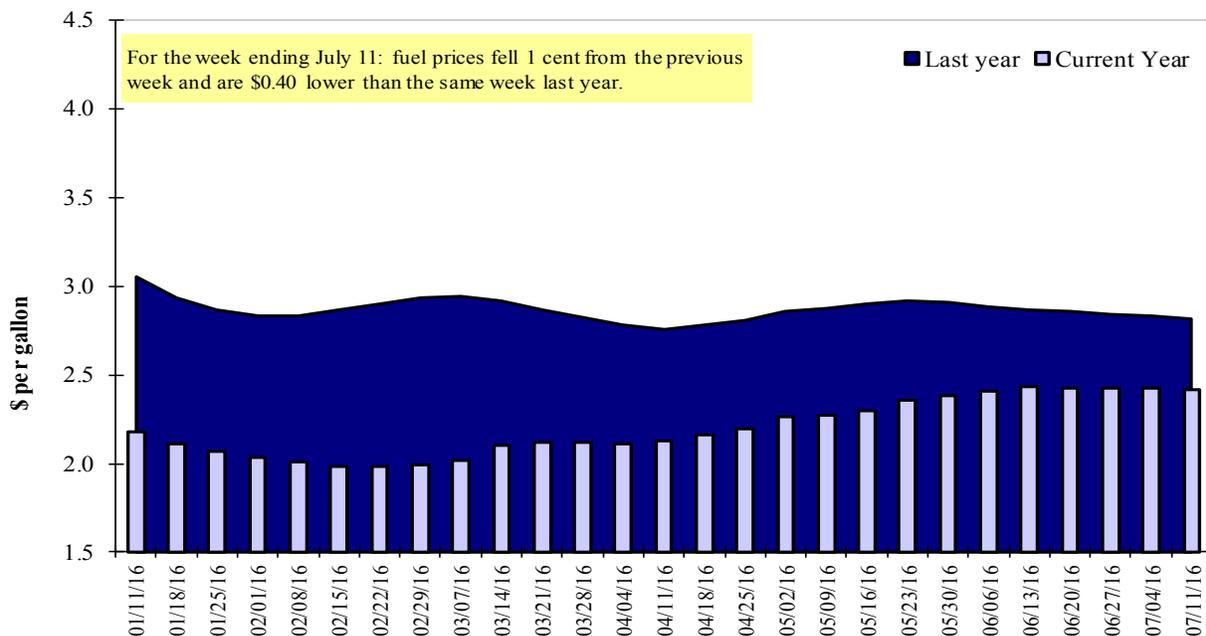
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
6/30/2016	2,155	700	2,243	1,129	118	6,345	11,811	7,227	25,383
This week year ago	1,264	883	1,459	990	201	4,795	9,028	2,688	16,512
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2015/16 YTD	901	126	684	394	11	2,116	35,441	44,071	81,628
2014/15 YTD	486	290	364	177	79	1,396	37,182	47,832	86,410
YTD 2015/16 as % of 2014/15	185	43	188	223	14	152	95	92	94
Last 4 wks as % of same period 2014/15	158	79	149	111	66	127	145	246	156
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309

<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 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](http://www.fas.usda.gov))

Table 13

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

For the week ending 6/30/2016	Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2012-2014
	2016/17	2015/16	2014/15		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	1,121	10,215	11,319	(10)	9,244
Mexico	1,953	12,347	10,500	18	7,448
Korea	138	2,649	3,595	(26)	2,630
Colombia	93	4,550	4,176	9	1,727
Taiwan	105	2,056	2,012	2	1,224
<b>Top 5 Importers</b>	<b>3,409</b>	<b>31,816</b>	<b>31,602</b>	<b>1</b>	<b>22,273</b>
<b>Total US corn export sales</b>	<b>5,487</b>	<b>47,252</b>	<b>46,210</b>	<b>2</b>	<b>34,445</b>
% of Projected	11%	98%	97%		
Change from prior week	<b>443</b>	<b>370</b>	<b>535</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	62%	67%	68%		65%
<b>USDA forecast, July 2016</b>	<b>52,163</b>	<b>48,346</b>	<b>47,430</b>	<b>2</b>	
<b>Corn Use for Ethanol USDA forecast, July 2016</b>	<b>133,985</b>	<b>132,715</b>	<b>132,080</b>	<b>0</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year (MY) = Sep 1 - Aug 31.

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

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**

For the week ending 6/30/2016	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2012-2014
	2016/17	2015/16	2014/15		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	3,121	27,549	29,983	(8)	24,211
Mexico	666	3,312	3,377	(2)	2,971
Indonesia	34	1,876	1,785	5	1,895
Japan	161	2,262	2,066	9	1,750
Taiwan	185	1,285	1,322	(3)	1,055
<b>Top 5 importers</b>	<b>4,167</b>	<b>36,285</b>	<b>38,533</b>	<b>(6)</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>7,599</b>	<b>51,298</b>	<b>50,520</b>	<b>2</b>	<b>39,169</b>
% of Projected	15%	105%	101%		
Change from prior week	<b>586</b>	<b>637</b>	<b>41</b>		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>55%</b>	<b>71%</b>	<b>76%</b>		<b>81%</b>
<b>USDA forecast, July 2016</b>	<b>52,316</b>	<b>48,910</b>	<b>50,218</b>	<b>(3)</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/. Total commitments change 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 6/30/2016	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2013-2015
	2016/17	2015/16		
	Current MY	Last MY		
		- 1,000 mt -		- 1,000 mt -
Japan	554	458	21	2,743
Mexico	702	635	11	2,660
Nigeria	322	626	(49)	1,978
Philippines	827	437	89	2,156
Brazil	202	145	39	2,273
Korea	463	376	23	1,156
Taiwan	240	289	(17)	923
Indonesia	165	136	21	790
Colombia	274	153	79	664
Thailand	220	136	62	685
<b>Top 10 importers</b>	<b>3,748</b>	<b>3,255</b>	<b>15</b>	<b>16,028</b>
<b>Total US wheat export sales</b>	<b>8,461</b>	<b>6,192</b>	<b>37</b>	<b>24,059</b>
% of Projected	34%	29%		
Change from prior week	<b>825</b>	<b>346</b>		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>44%</b>	<b>53%</b>		<b>67%</b>
<b>USDA forecast, July 2016</b>	<b>25,204</b>	<b>21,117</b>	<b>19</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/. Total commitments change 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 07/07/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of:		2015 Total*
							Last Year	Prior 3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	165	276	60	6,316	5,576	113	228	152	10,985
Corn	350	503	70	5,597	5,254	107	147	241	7,232
Soybeans	0	0	n/a	4,435	4,054	109	n/a	57000	11,809
<b>Total</b>	<b>515</b>	<b>779</b>	<b>66</b>	<b>16,349</b>	<b>14,884</b>	<b>110</b>	<b>173</b>	<b>195</b>	<b>30,027</b>
<b>Mississippi Gulf</b>									
Wheat	104	125	83	1,911	2,200	87	90	58	4,504
Corn	817	460	177	16,439	16,151	102	119	147	26,701
Soybeans	317	83	382	10,249	10,998	93	127	214	29,593
<b>Total</b>	<b>1,238</b>	<b>669</b>	<b>185</b>	<b>28,599</b>	<b>29,349</b>	<b>97</b>	<b>117</b>	<b>139</b>	<b>60,797</b>
<b>Texas Gulf</b>									
Wheat	81	123	66	1,956	2,152	91	204	111	3,724
Corn	30	32	93	532	301	177	393	462	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
<b>Total</b>	<b>110</b>	<b>154</b>	<b>72</b>	<b>2,580</b>	<b>2,663</b>	<b>97</b>	<b>224</b>	<b>128</b>	<b>5,184</b>
<b>Interior</b>									
Wheat	31	23	134	656	735	89	65	91	1,388
Corn	115	156	74	3,641	3,181	114	125	160	6,201
Soybeans	40	114	35	2,066	1,783	116	180	218	3,518
<b>Total</b>	<b>186</b>	<b>294</b>	<b>63</b>	<b>6,364</b>	<b>5,699</b>	<b>112</b>	<b>127</b>	<b>164</b>	<b>11,106</b>
<b>Great Lakes</b>									
Wheat	14	53	25	295	273	108	170	266	997
Corn	19	19	100	164	209	78	60	138	485
Soybeans	0	0	n/a	23	66	35	n/a	n/a	733
<b>Total</b>	<b>33</b>	<b>73</b>	<b>45</b>	<b>482</b>	<b>548</b>	<b>88</b>	<b>106</b>	<b>205</b>	<b>2,216</b>
<b>Atlantic</b>									
Wheat	1	1	n/a	184	370	50	2	3	520
Corn	0	0	n/a	14	82	17	0	0	277
Soybeans	36	5	666	928	949	98	232	472	2,053
<b>Total</b>	<b>36</b>	<b>6</b>	<b>579</b>	<b>1,125</b>	<b>1,400</b>	<b>80</b>	<b>38</b>	<b>64</b>	<b>2,850</b>
<b>U.S. total from ports**</b>									
Wheat	395	601	66	11,318	11,305	100	151	110	22,118
Corn	1,331	1,170	114	26,386	25,179	105	126	169	41,492
Soybeans	393	203	194	17,794	18,060	99	143	223	48,570
<b>Total</b>	<b>2,119</b>	<b>1,974</b>	<b>107</b>	<b>55,498</b>	<b>54,544</b>	<b>102</b>	<b>134</b>	<b>154</b>	<b>112,180</b>

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

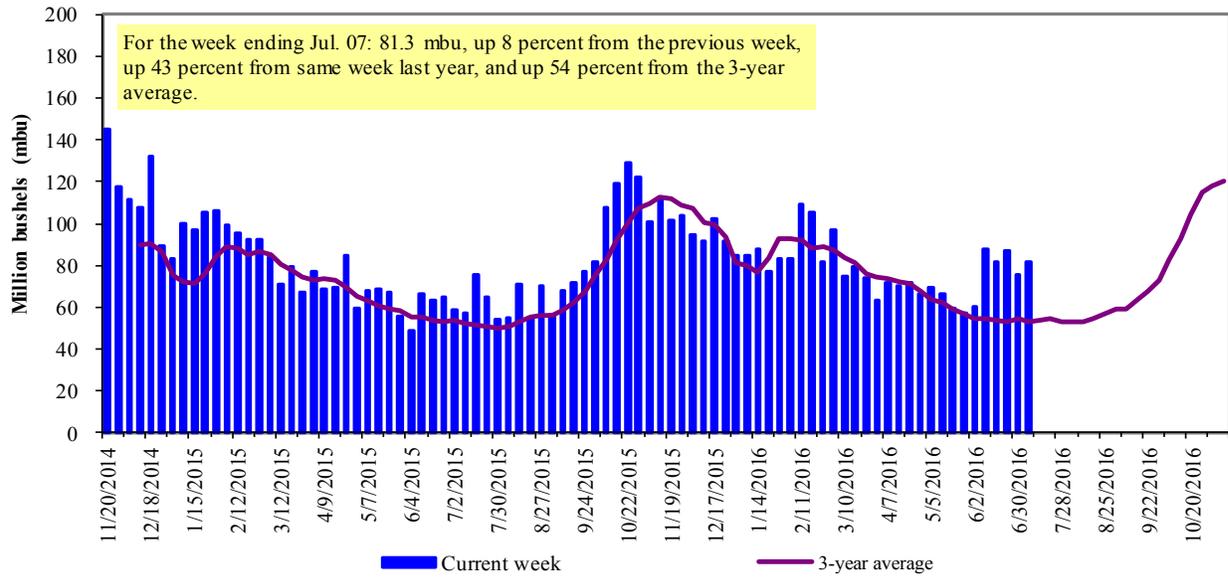
\*\*Total only includes regions shown above

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 2015.

Figure 14

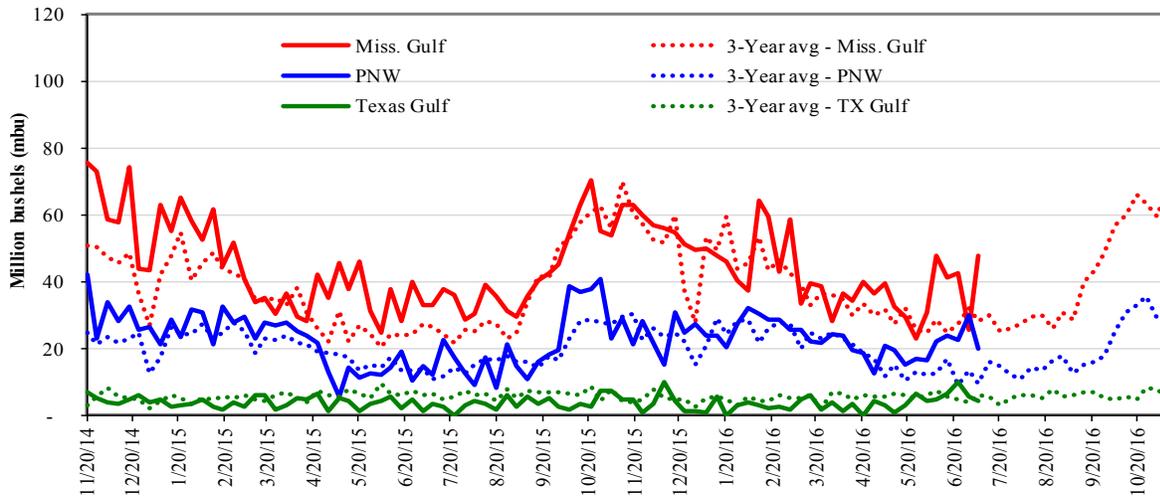
**U.S. grain inspected for export (wheat, corn, and soybeans)**



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)**



Week ending 07/07/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	47.6	Last Week:	MS Gulf up 85	TX Gulf down 28	U.S. Gulf up 64	PNW down 34
PNW:	19.8	Last Year (same week):	up 45	up 23	up 43	up 64
Texas Gulf:	4.1	3-yr avg. (4-wk. mov. Avg):	up 70	down 19	up 56	up 62

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

# Ocean Transportation

Table 17

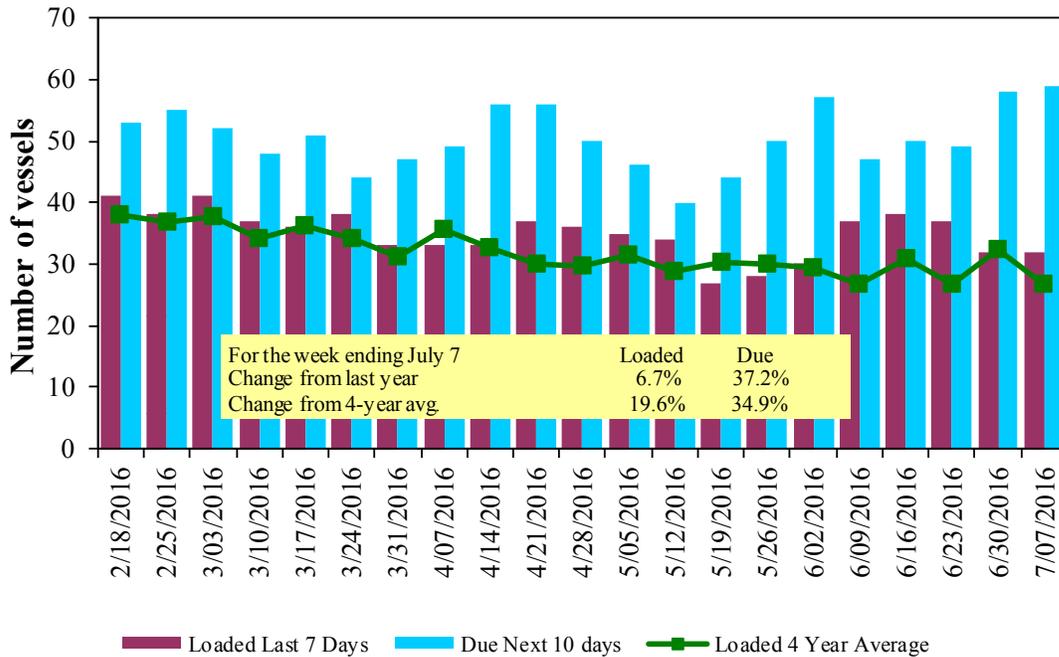
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
7/7/2016	38	32	59	8	n/a
6/30/2016	25	32	58	7	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

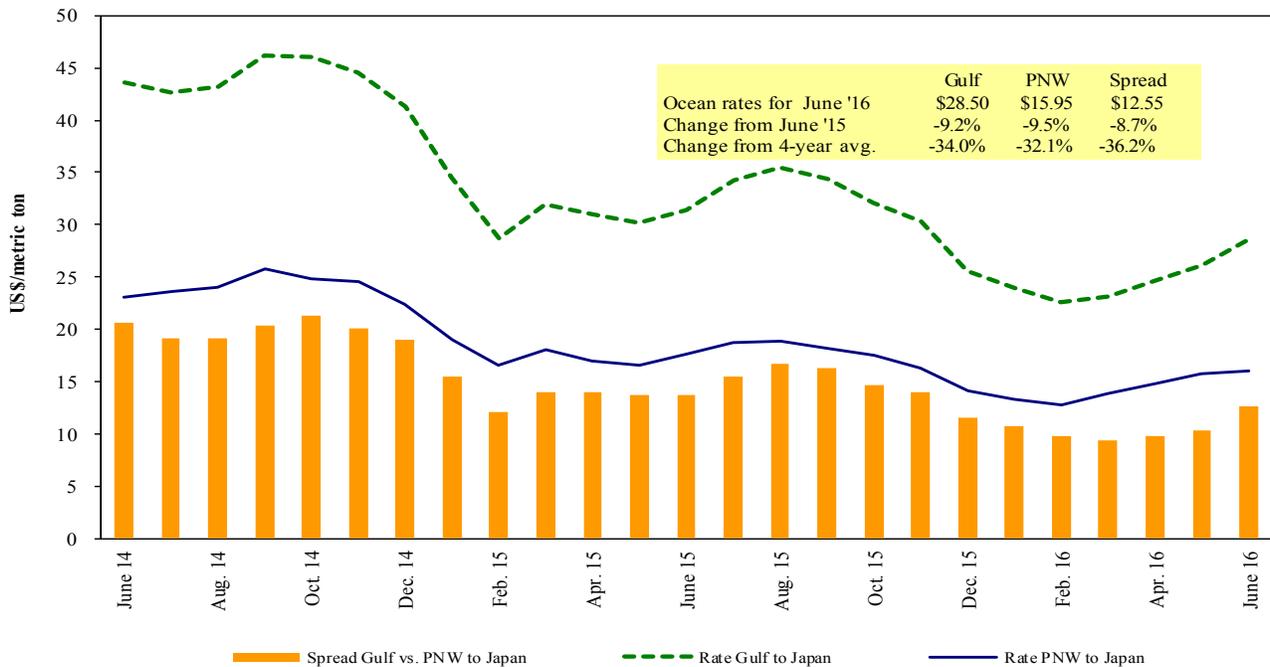
**U.S. Gulf<sup>d</sup> Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA

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 07/09/2016**

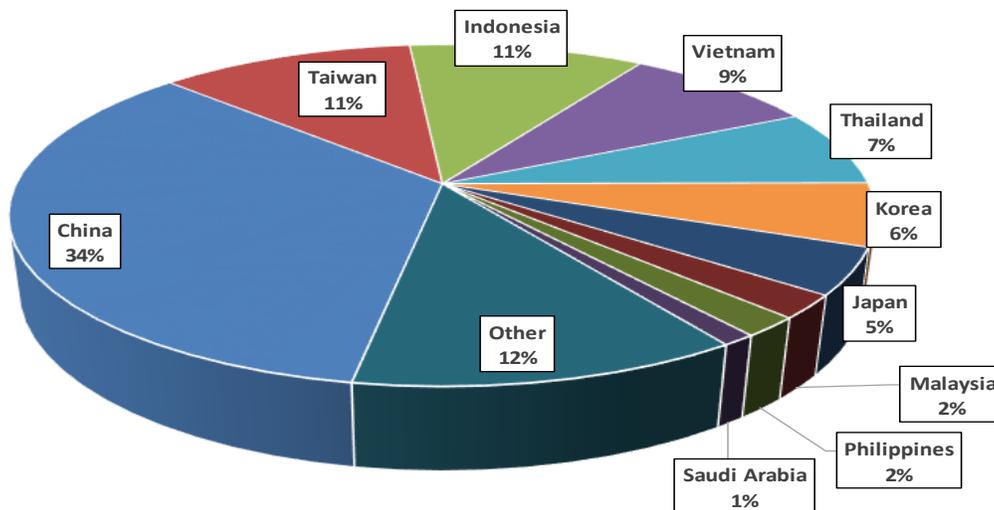
Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jul 20/30	60,000	19.50
U.S. Gulf	China	Heavy Grain	Jun 7/17	66,000	17.50
U.S. Gulf	China	Heavy Grain	May 20/30	60,000	18.25
U.S. Gulf	Tanzania	Wheat <sup>1</sup>	June 20/29	13,000	35.67
U.S. Gulf	Djibouti or Pt Sudan	Wheat <sup>1</sup>	Jul 1/10	51,000	47.25 op 46.00
PNW	Japan	Heavy Grain	Jul 20/30	60,000	16.50
PNW	Japan	Heavy Grain	Jul 5/15	60,000	15.10
PNW	Japan	Heavy Grain	Jun 20/Jul 1	60,000	15.90
PNW	Japan	Heavy Grain	Jun 20/Jul 1	60,000	15.00
PNW	Japan	Heavy Grain	May 17/26	59,800	15.45
Albany	Me Gulf	Grain	Jun 17/25	53,000	13.85
Brazil	Japan	Heavy Grain	Sep 1/30	62,000	19.00
Brazil	China	Heavy Grain	Jun 28/Jul 4	60,000	18.00
Brazil	China	Heavy Grain	June 20/30	60,000	19.00
Brazil	China	Heavy Grain	May 20/30	60,000	18.25
Brazil	China	Heavy Grain	May 1/20	60,000	15.50
EC S America	China	Heavy Grain	May/June	60,000	14.75
River Plate	China	Heavy Grain	Jun 23/30	60,000	22.60
Ukraine	Spain	Heavy Grain	May 22/26	60,000	10.50

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

In 2014, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2014 went to Asia, of which 11 percent were moved in containers. Approximately 95 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–December 2015**

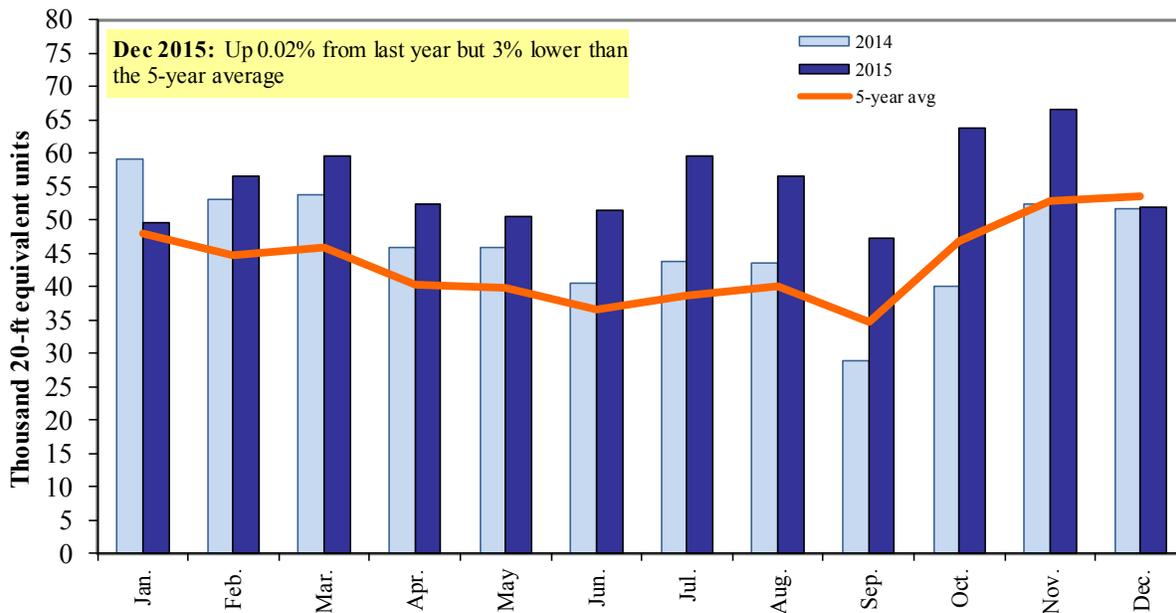


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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