



# Feature Article/Calendar

## Second Quarter Wheat Transportation Costs Up; Landed Costs Mixed

During the second quarter 2016, transportation costs for shipping Kansas and North Dakota wheat to Japan through the Pacific Northwest (PNW) and U.S. Gulf increased from the previous quarter, but were down mostly from last year. Shippers from these regions experienced higher trucking and ocean rates from the first quarter. Total landed costs were down for Kansas, but up slightly for North Dakota. Second quarter rail rates to ship wheat from each State to the PNW and Gulf were down from the previous quarter and last year.

Quarter-to-quarter costs for shipping wheat from Kansas through the PNW increased 7 percent, and North Dakota costs increased 5 percent (*see table 1*). Quarter-to-quarter transportation costs for shipping wheat from Kansas to the Gulf increased 9 percent, while North Dakota costs increased 6 percent (*see table 2*). Year-to-year transportation costs for shipping wheat from Kansas through the PNW were unchanged, but North Dakota costs through the PNW were down slightly. Quarter-to-quarter total landed costs for shipping wheat from Kansas were down, but North Dakota total landed costs were up slightly for each route. Year-to-year landed costs were down for each route, due mainly to lower ocean rates and farm values.

**Table 1: Quarterly rate comparisons for shipping Kansas & North Dakota wheat to Japan through the PNW**

Mode	Kansas					North Dakota				
	2015 2nd qtr	2016 1st qtr	2016 2nd qtr	Year-to-Year change	Quarterly change	2015 2nd qtr	2016 1st qtr	2016 2nd qtr	Year-to-Year change	Quarterly change
				%	%				%	%
Truck	9.18	8.18	12.10	31.81	47.92	9.18	8.18	12.10	31.81	47.92
Rail <sup>1</sup>	55.39	55.09	54.40	-1.79	-1.25	55.58	55.42	53.22	-4.25	-3.97
Ocean vessel	17.04	13.30	15.50	-9.04	16.54	17.04	13.30	15.50	-9.04	16.54
Transportation Costs	81.61	76.57	82.00	0.48	7.09	81.80	76.90	80.82	-1.20	5.10
Farm Value <sup>2</sup>	193.15	151.63	143.67	-25.62	-5.25	193.27	173.68	171.35	-11.34	-1.34
Total Landed Cost	274.76	228.20	225.67	-17.87	-1.11	275.07	250.58	252.17	-8.33	0.63
Transport % of landed cost	29.70	33.55	36.34			29.74	30.69	32.05		

**Table 2: Quarterly rate comparisons for shipping Kansas & North Dakota wheat to Japan through the Gulf**

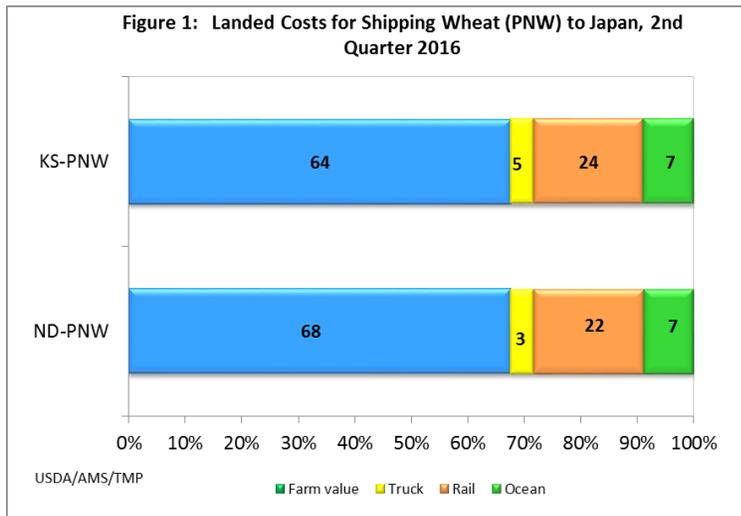
Mode	Kansas					North Dakota				
	2015 2nd qtr	2016 1st qtr	2016 2nd qtr	Year-to-Year change	Quarterly change	2015 2nd qtr	2016 1st qtr	2016 2nd qtr	Year-to-Year change	Quarterly change
				%	%				%	%
Truck	9.18	8.18	12.10	31.81	47.92	9.18	8.18	12.10	31.81	47.92
Rail <sup>1</sup>	38.09	38.49	37.76	-0.87	-1.90	64.80	58.27	56.33	-13.07	-3.33
Ocean vessel	30.86	23.22	26.40	-14.45	13.70	30.86	23.22	26.40	-14.45	13.70
Transportation Costs	78.13	69.89	76.26	-2.39	9.11	104.84	89.67	94.83	-9.55	5.75
Farm Value <sup>2</sup>	193.15	151.63	143.67	-25.62	-5.25	193.27	173.68	171.35	-11.34	-1.34
Total Landed Cost	271.28	221.52	219.93	-18.93	-0.72	298.11	263.35	266.18	-10.71	1.07
Transport % of landed cost	28.80	31.55	34.67			35.17	34.05	35.63		

Source: USDA/AMSTMP

<sup>1</sup> Rail tariff rates include fuel surcharges and revisions for heavy axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car

<sup>2</sup> Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

**PNW Cost Analysis:** The total landed cost (farm value plus transportation costs) to ship from each State through the PNW was about \$226 per metric ton (mt) from Kansas and \$252 per mt from North Dakota during the second quarter (*see table 1*). Compared to the previous quarter, PNW total landed costs for shipping wheat to Japan decreased 1 percent from Kansas but increased 1 percent from North Dakota (*see table 1*). Year-to-year landed costs were down 18 percent from Kansas and 8 percent from North Dakota, respectively. Rail's share of PNW total landed costs increased from last year, but farm values slipped to 64 percent of the landed cost for shipping from Kansas and 68 percent from North Dakota (*see figure 1*).



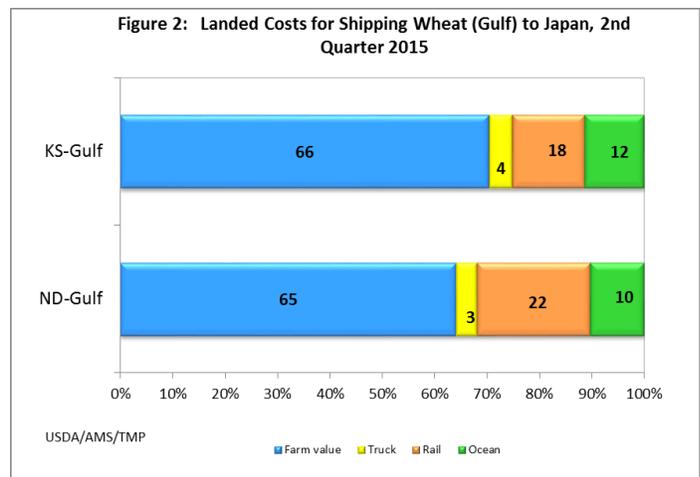
Second quarter ocean rates for shipping grain from the PNW to Japan increased 17 percent from quarter to quarter, due mainly to increased iron shipments to China and higher Chinese steel prices (*GTR dated 8/04/16*). PNW ocean rates were down 9 percent year to year.

Quarter-to-quarter rail rates for shipping wheat from Kansas to the PNW were down 1 percent and down 4 percent from North Dakota. Year-to-year rail rates to ship wheat to the PNW decreased 2 percent for Kansas and 4 percent for North Dakota. Truck rates jumped 48 percent from quarter to quarter as trucking activity increased 37 percent. Year-to-year trucking rates were down as well, falling 32 percent. Second quarter PNW

transportation costs represented 32 and 36 percent of the total landed costs from Kansas and North Dakota, respectively, up from the previous quarter and last year (*see table 1*).

**Gulf Cost Analysis:** Quarter-to-quarter total landed costs to ship wheat through the Gulf from Kansas decreased 1 percent, but North Dakota landed costs increased 1 percent for the same period (*see table 2*). Year-to-year landed costs were down 19 percent for shipping wheat from Kansas and down 11 percent from North Dakota (*see table 2*). The total landed cost to ship wheat from each State through the Gulf was \$220/mt from Kansas and \$266/mt from North Dakota. Year-to-year wheat farm value's share of the Gulf's landed cost was 66 percent for Kansas and 65 percent for North Dakota (*see figure 2*).

Ocean rates for shipping wheat to Japan from the Gulf increased 14 percent from quarter to quarter, but dropped 14 percent from year to year. Quarter-to-quarter rail rates to the Gulf from Kansas and North Dakota decreased 2 percent and 3 percent, respectively. Year-to-year rail rates for shipping wheat from Kansas to the Gulf decreased slightly, but North Dakota rates decreased 13 percent. Second quarter Gulf transportation costs represented 35 to 36 percent of the total landed costs (*see table 2*).



**PNW vs. Gulf Cost Comparison:** Quarter-to-quarter rail rates to ship wheat from Kansas and North Dakota decreased for each route. Year-to-year rail rates for shipping wheat from each state were also down, especially from North Dakota to the Gulf (*see tables 1 and 2*). Quarter-to-quarter ocean rates increased notably from each region. Year-to-year ocean rates however, were down for shipping from each region. Gulf ocean rates decreased 15 percent from year to year due to excess vessel supply. The total landed costs to ship wheat from North Dakota and Kansas through the PNW and Gulf were mostly down, but quarter-to-quarter landed costs from North Dakota to the each region rose slightly (*tables 1, 2*).

According to USDA's Grain Inspection, Packers and Stockyards Administration, second quarter wheat inspected for export to Japan totaled 0.584 million metric tons (mmt), 2 percent above the second quarter last year but 16 percent below the first quarter 2016. Second-quarter wheat exports to Japan accounted for 10 percent of total second-quarter wheat exports (6 mmt), which were up 11 percent from last year (*GTR July 28, 2016*). During the second quarter of 2016, Japan was the top importer of U.S. wheat. According to the July *World Agricultural Supply and Demand Estimates* report, U.S. wheat exports for 2016/17 are expected to increase 19 percent from the previous year. Higher U.S. stocks and lower prices have helped the increase in wheat exports. [Johnny.Hill@ams.usda.gov](mailto:Johnny.Hill@ams.usda.gov)

# 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
08/10/16	155	261	231	202	126	113
08/03/16	158	261	225	218	132	117

<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)**

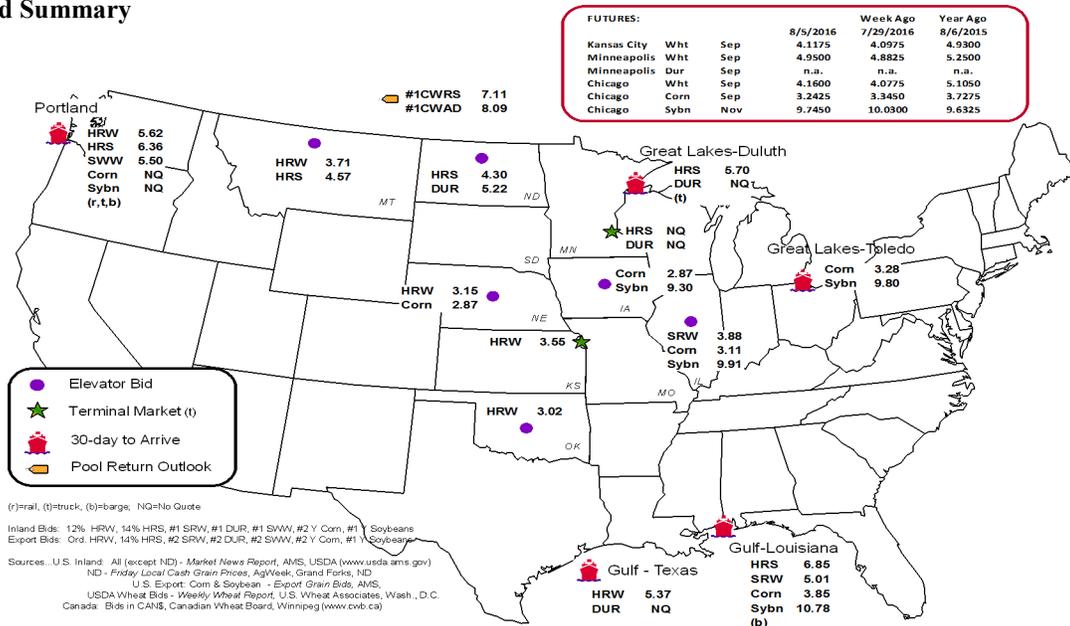
Commodity	Origin--Destination	8/5/2016	7/29/2016
Corn	IL--Gulf	-0.74	-0.83
Corn	NE--Gulf	-0.98	-1.10
Soybean	IA--Gulf	-1.48	-1.55
HRW	KS--Gulf	-1.82	-1.82
HRS	ND--Portland	0.00	-2.10

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			
8/03/2016 <sup>p</sup>	1,179	1,411	4,772	287	7,649	7/30/2016	2,046
7/27/2016 <sup>r</sup>	863	875	4,258	296	6,292	7/23/2016	1,943
2016 YTD <sup>r</sup>	9,041	43,955	151,110	10,797	214,903	2016 YTD	63,559
2015 YTD <sup>r</sup>	12,544	36,943	129,125	14,526	193,138	2015 YTD	54,836
2016 YTD as % of 2015 YTD	72	119	117	74	111	% change YTD	116
Last 4 weeks as % of 2015 <sup>2</sup>	362	246	156	116	175	Last 4wks % 2015	115
Last 4 weeks as % of 4-year avg. <sup>2</sup>	426	110	177	145	168	Last 4wks % 4 yr	131
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.

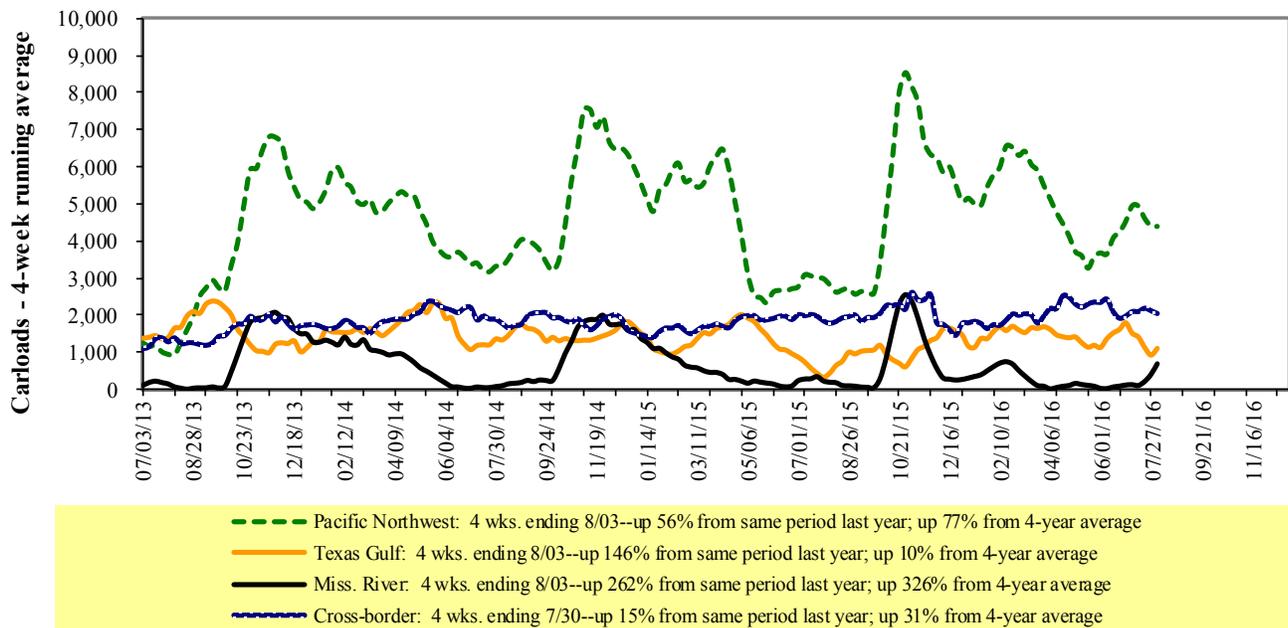
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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)**

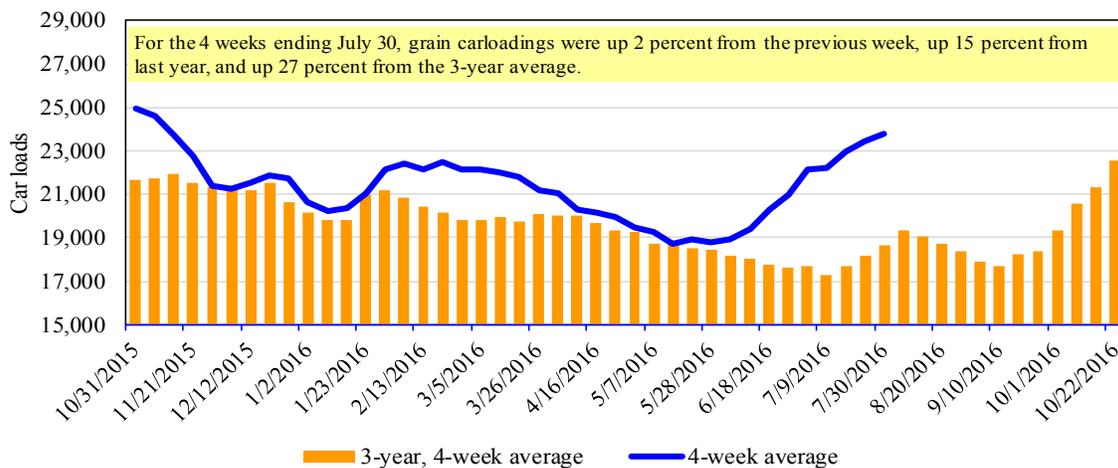
For the week ending: 7/30/2016	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,355	2,833	13,712	773	6,004	24,677	4,244	4,668
This week last year	2,180	2,629	10,366	848	5,379	21,402	3,485	4,541
2016 YTD	52,518	84,113	318,065	25,687	158,473	638,856	97,932	128,941
2015 YTD	61,768	89,610	294,994	26,043	154,440	626,855	123,149	132,470
2016 YTD as % of 2015 YTD	85	94	108	99	103	102	80	97
Last 4 weeks as % of 2015*	68	106	129	112	113	115	96	98
Last 4 weeks as % of 3-yr avg.**	81	106	147	143	119	127	104	89
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: 8/4/2016		<u>Delivery period</u>							
		Aug-16	Aug-15	Sep-16	Sep-15	Oct-16	Oct-15	Nov-16	Nov-15
BNSF <sup>3</sup>	COT grain units	1	47	no bids	16	128	5	no bids	no bids
	COT grain single-car <sup>5</sup>	250 .. 253	0 .. 100	77 .. 211	0 .. 10	93 .. 153	31	21 .. 201	2 .. 11
UP <sup>4</sup>	GCAS/Region 1	no offer	no bids	no offer	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no offer	no bids	no offer	no bids	no offer	10	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.

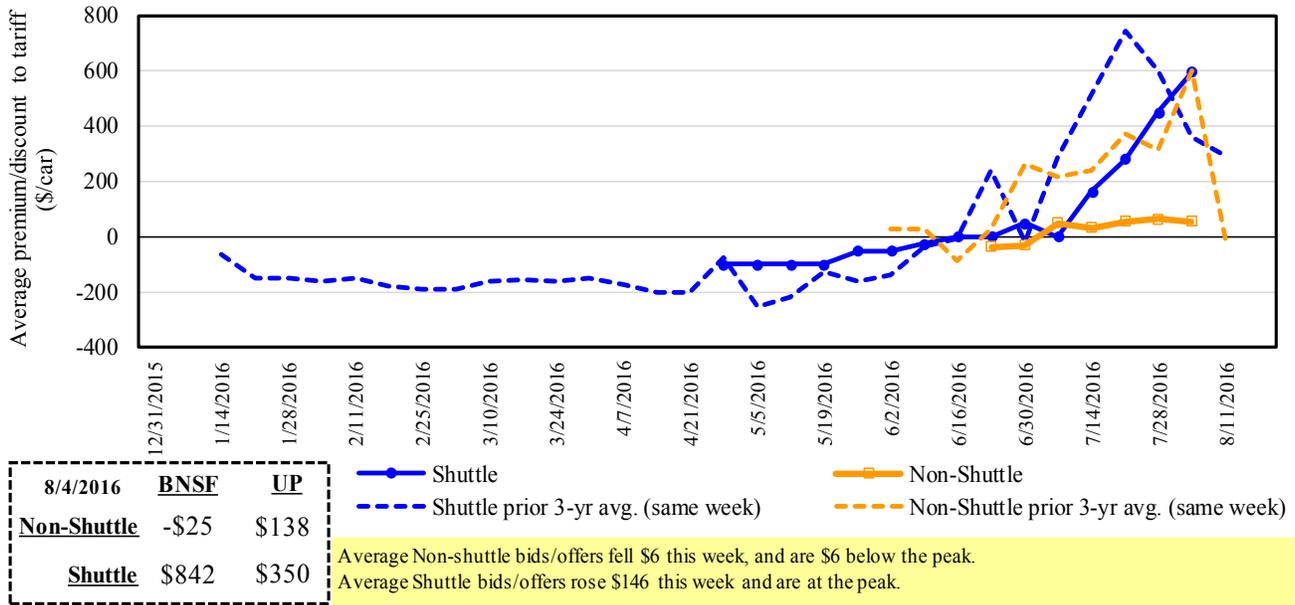
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

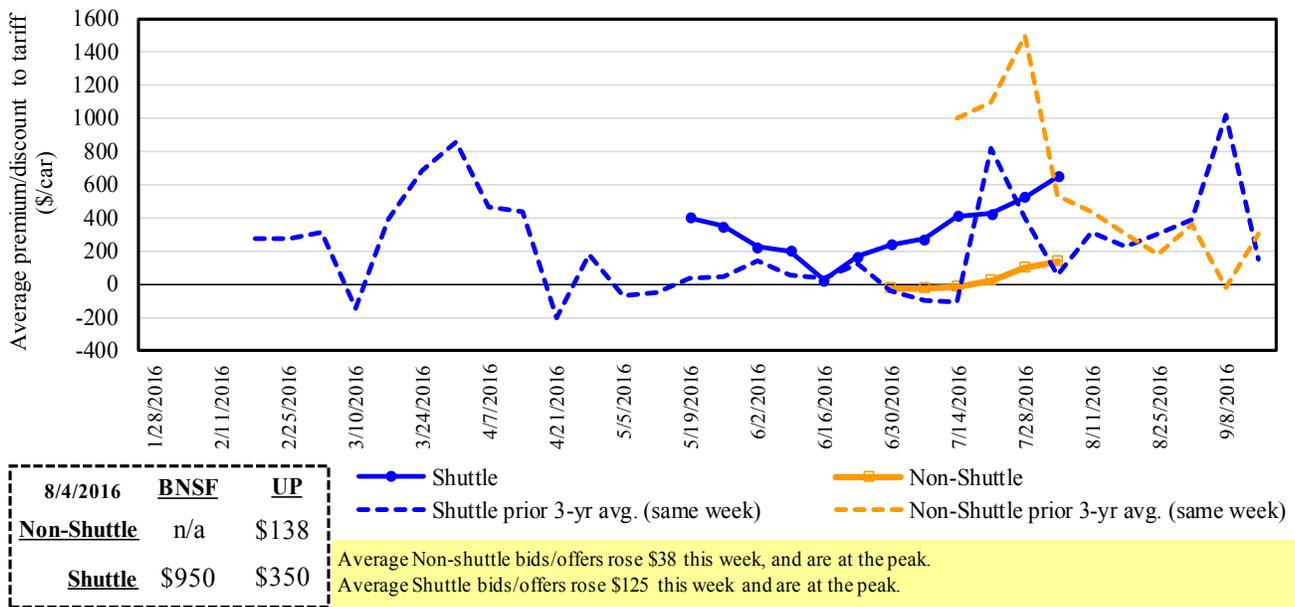
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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

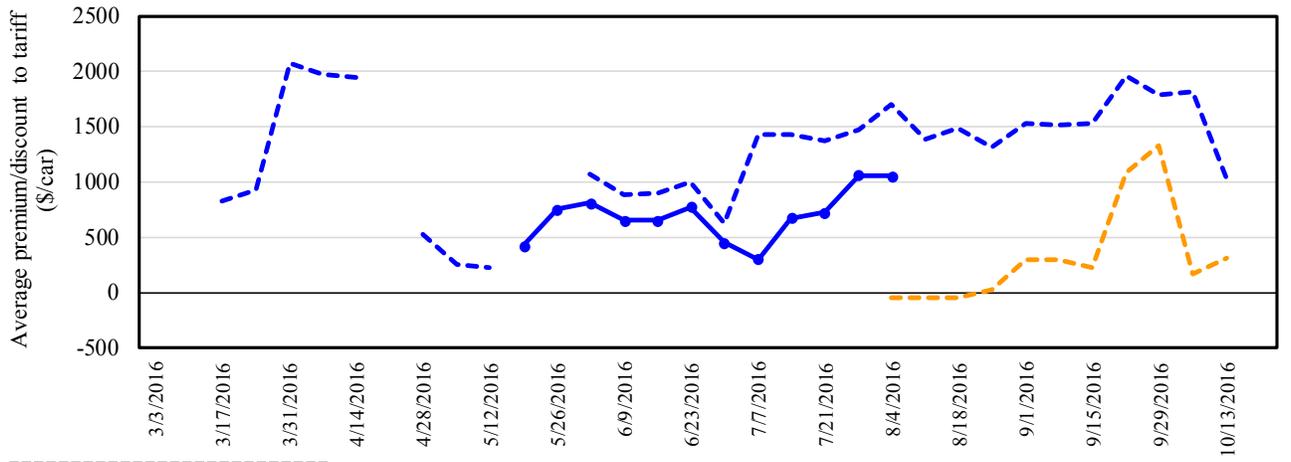
**Figure 5**  
**Bids/Offers for Railcars to be Delivered in September 2016, Secondary Market**



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 October 2016, Secondary Market**



<b>8/4/2016</b>	<b>BNSF</b>	<b>UP</b>		
<b>Non-Shuttle</b>	n/a	n/a		
<b>Shuttle</b>	\$1,600	\$500		

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

There were no Non-Shuttle bids/offers this week.  
 Average Shuttle bids/offers fell \$10 this week and are \$10 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					
		Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17
<b>Non-shuttle</b>	<b>BNSF-GF</b>	(25)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(25)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	(63)	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	138	138	n/a	n/a	n/a	n/a
	Change from last week	13	38	n/a	n/a	n/a	n/a
Change from same week 2015	213	n/a	n/a	n/a	n/a	n/a	
<b>Shuttle</b>	<b>BNSF-GF</b>	842	950	1600	500	0	n/a
	Change from last week	292	167	112	(300)	(100)	n/a
	Change from same week 2015	981	981	950	n/a	n/a	n/a
	<b>UP-Pool</b>	350	350	500	500	250	n/a
	Change from last week	0	83	(133)	0	(50)	n/a
Change from same week 2015	588	550	n/a	n/a	n/a	n/a	

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

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

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

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:							Percent change
8/1/2016	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Y/Y <sup>3</sup>
					metric ton	bushel <sup>2</sup>	
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$35	\$36.15	\$0.98	-1
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	-\$3	\$41.11	\$1.12	-1
	Wichita, KS	Los Angeles, CA	\$6,950	-\$15	\$68.86	\$1.87	-2
	Wichita, KS	New Orleans, LA	\$4,243	\$62	\$42.75	\$1.16	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$13	\$64.28	\$1.75	-2
	Northwest KS	Galveston-Houston, TX	\$4,511	\$68	\$45.47	\$1.24	-2
	Amarillo, TX	Los Angeles, CA	\$4,710	\$95	\$47.72	\$1.30	-2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$70	\$37.25	\$0.95	8
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	9
	Des Moines, IA	Davenport, IA	\$2,168	\$15	\$21.68	\$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	\$44	\$34.64	\$0.88	2
	Des Moines, IA	Los Angeles, CA	\$5,052	\$128	\$51.44	\$1.31	1
	Minneapolis, MN	New Orleans, LA	\$3,799	\$37	\$38.10	\$1.04	-3
	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	\$70	\$44.34	\$1.21	8	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,953	-\$9	\$39.17	\$1.07	-2
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$7	\$38.37	\$1.04	-3
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	16
	Grand Forks, ND	Portland, OR	\$5,611	-\$15	\$55.57	\$1.51	-3
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	-\$16	\$58.74	\$1.60	-12
	Northwest KS	Portland, OR	\$5,478	\$112	\$55.51	\$1.51	-3
	Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$19	\$49.47	\$1.26
Sioux Falls, SD		Tacoma, WA	\$4,960	-\$17	\$49.09	\$1.25	-7
Champaign-Urbana, IL		New Orleans, LA	\$3,481	\$70	\$35.27	\$0.90	7
Lincoln, NE		Galveston-Houston, TX	\$3,600	-\$10	\$35.65	\$0.91	-3
Des Moines, IA		Amarillo, TX	\$3,795	\$55	\$38.23	\$0.97	1
Minneapolis, MN		Tacoma, WA	\$5,000	-\$18	\$49.47	\$1.26	-7
Council Bluffs, IA		Stockton, CA	\$4,640	-\$19	\$45.89	\$1.17	-4
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	-\$17	\$54.35	\$1.48	-7
	Minneapolis, MN	Portland, OR	\$5,510	-\$19	\$54.53	\$1.48	-7
	Fargo, ND	Tacoma, WA	\$5,380	-\$15	\$53.28	\$1.45	-6
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$81	\$44.75	\$1.22	-2
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	10
Grand Island, NE	Portland, OR	\$5,360	\$115	\$54.37	\$1.48	-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	\$49	\$67.05	\$1.82	-5
	KS	Guadalajara, JA	\$6,995	\$90	\$72.39	\$1.97	-4
	TX	Salinas Victoria, NL	\$4,142	\$29	\$42.62	\$1.16	0
Corn	IA	Guadalajara, JA	\$8,137	\$89	\$84.05	\$2.13	-5
	SD	Celaya, GJ	\$7,480	\$0	\$76.43	\$1.94	-6
	NE	Querretaro, QA	\$7,879	\$99	\$81.52	\$2.07	1
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	6
	MO	Tlalhepantla, EM	\$7,238	\$97	\$74.94	\$1.90	1
	SD	Torreon, CU	\$7,080	\$0	\$72.34	\$1.84	-2
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$89	\$89.31	\$2.43	2
	NE	Guadalajara, JA	\$9,142	\$95	\$94.37	\$2.57	0
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	0
	KS	Torreon, CU	\$7,439	\$70	\$76.72	\$2.09	1
Sorghum	NE	Celaya, GJ	\$7,344	\$84	\$75.89	\$1.93	-3
	KS	Querretaro, QA	\$7,563	\$61	\$77.89	\$1.98	-1
	NE	Salinas Victoria, NL	\$6,168	\$49	\$63.52	\$1.61	3
	NE	Torreon, CU	\$6,672	\$68	\$68.87	\$1.75	-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.

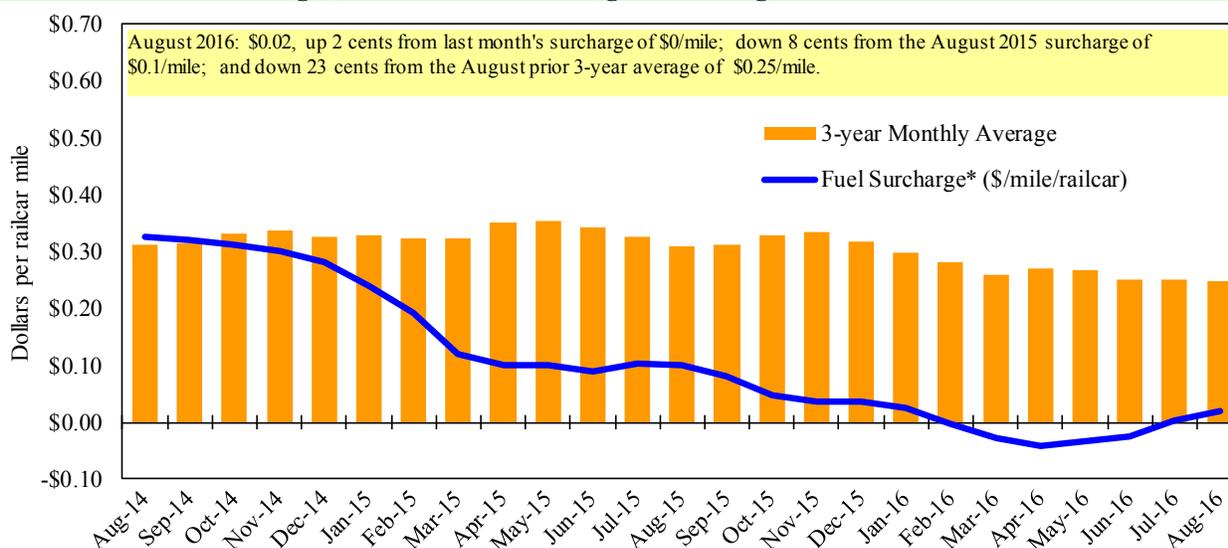
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

<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.

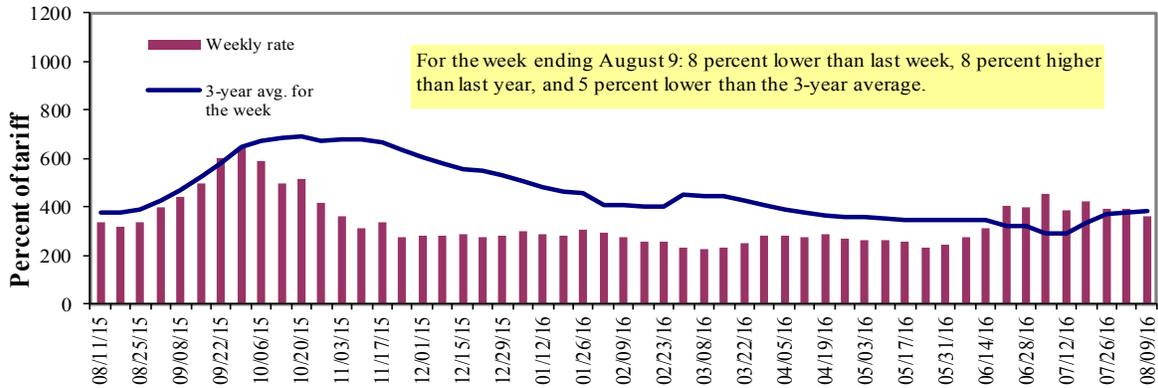
\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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>	8/9/2016	475	393	363	275	300	300	248
	8/2/2016	495	420	393	293	313	313	255
<b>\$/ton</b>	8/9/2016	29.40	20.91	16.84	10.97	14.07	12.12	7.79
	8/2/2016	30.64	22.34	18.24	11.69	14.68	12.65	8.01
<b>Current week % change from the same week:</b>								
	Last year	18	13	8	13	6	6	5
	3-year avg. <sup>2</sup>	4	-1	-5	-8	-11	-11	-8
<b>Rate<sup>1</sup></b>	September	575	545	538	450	545	545	448
	November	613	538	520	425	488	488	400

<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:

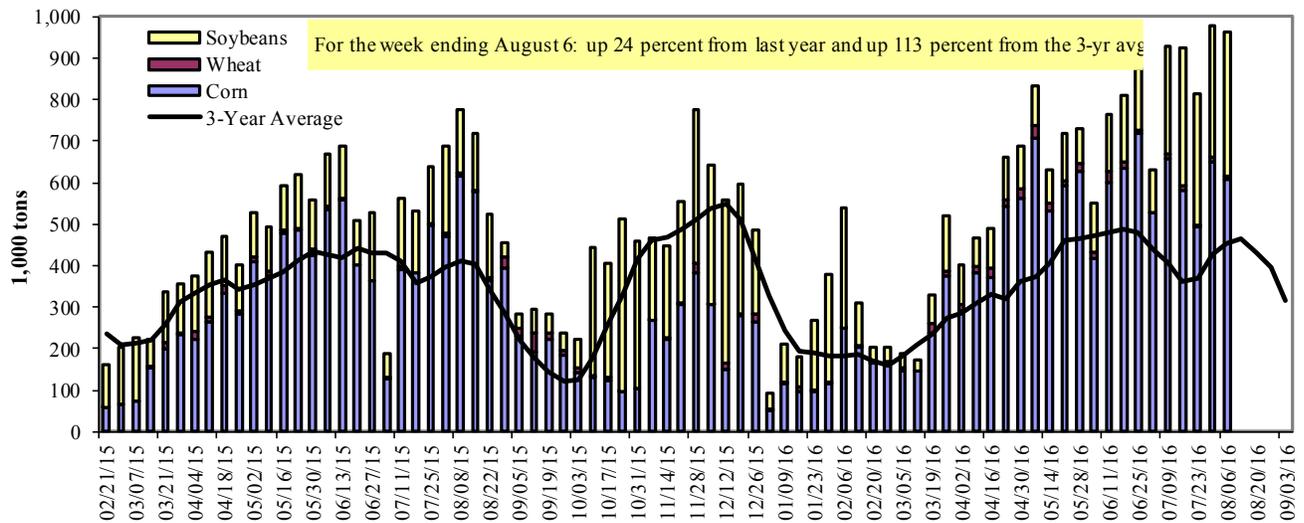
(Rate \* 1976 tariff benchmark rate per ton)/100

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 8/06/2016	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	257	2	220	0	479
Winfield, MO (L25)	327	8	229	0	563
Alton, IL (L26)	598	8	336	5	946
Granite City, IL (L27)	608	8	349	6	970
<b>Illinois River (L8)</b>	209	0	90	0	299
<b>Ohio River (L52)</b>	40	9	52	0	100
<b>Arkansas River (L1)</b>	0	48	6	0	53
Weekly total - 2016	648	64	406	6	1,124
Weekly total - 2015	653	112	176	5	947
2016 YTD <sup>1</sup>	15,419	1,368	6,889	179	23,855
2015 YTD	13,351	1,063	6,298	143	20,855
2016 as % of 2015 YTD	115	129	109	126	114
Last 4 weeks as % of 2015 <sup>2</sup>	109	113	195	64	129
Total 2015	19,215	1,686	14,191	359	35,451

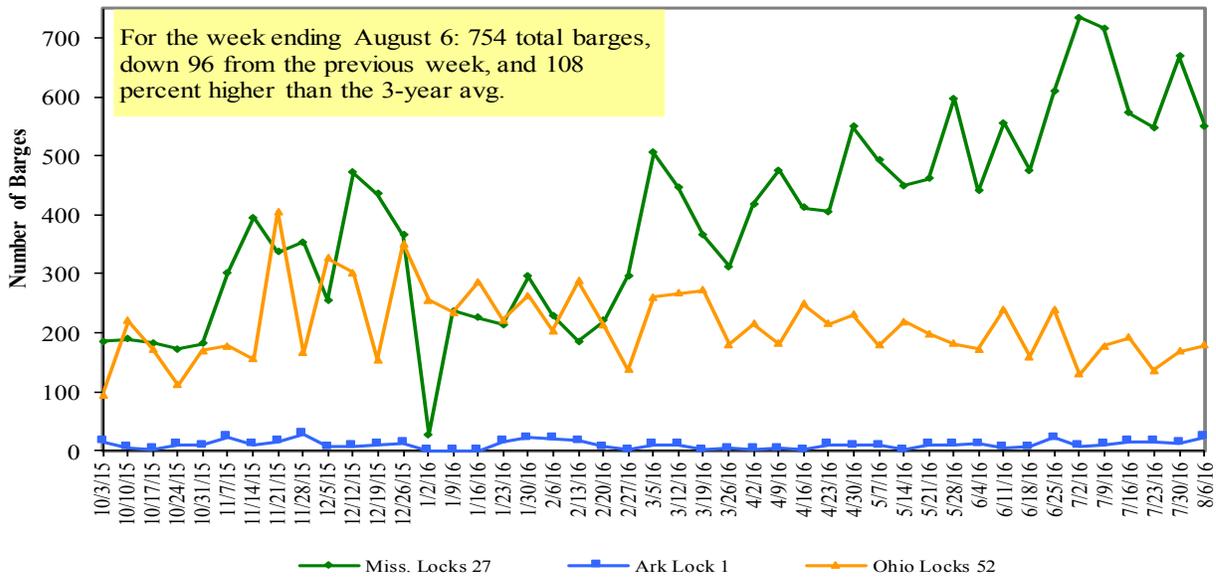
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

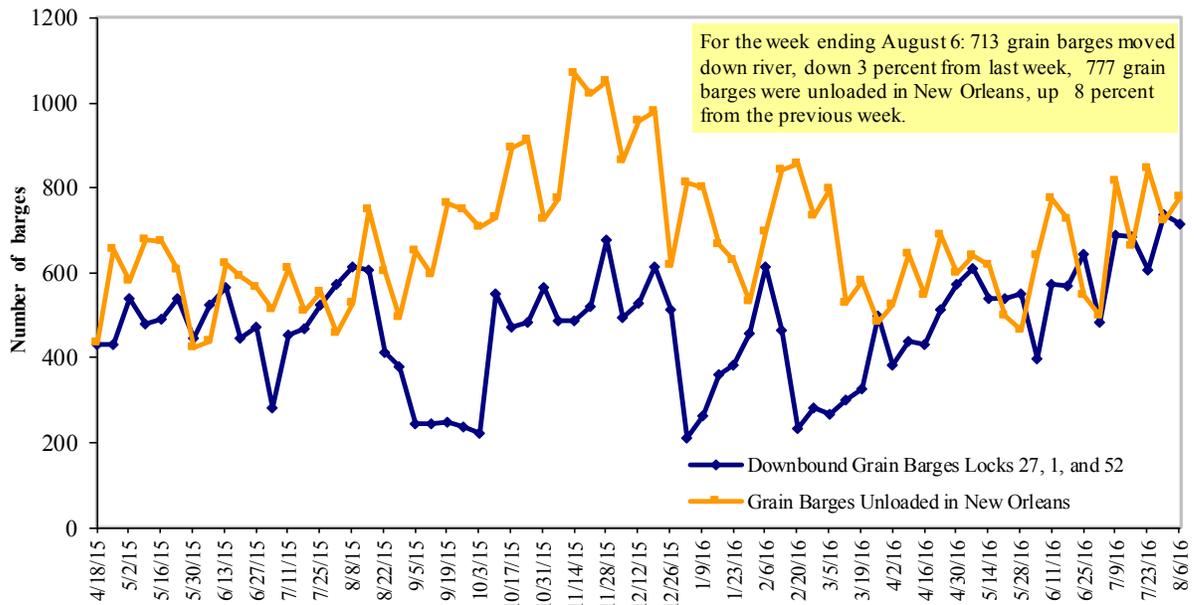
Source: U.S. Army Corps of Engineers

**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 8/08/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.321	-0.033	-0.392
	New England	2.378	-0.018	-0.469
	Central Atlantic	2.412	-0.029	-0.420
	Lower Atlantic	2.241	-0.038	-0.354
II	Midwest <sup>2</sup>	2.275	-0.029	-0.240
III	Gulf Coast <sup>3</sup>	2.184	-0.040	-0.303
IV	Rocky Mountain	2.396	-0.023	-0.244
V	West Coast	2.595	-0.035	-0.251
	West Coast less California	2.454	-0.038	-0.252
	California	2.707	-0.034	-0.253
Total	U.S.	2.316	-0.032	-0.301

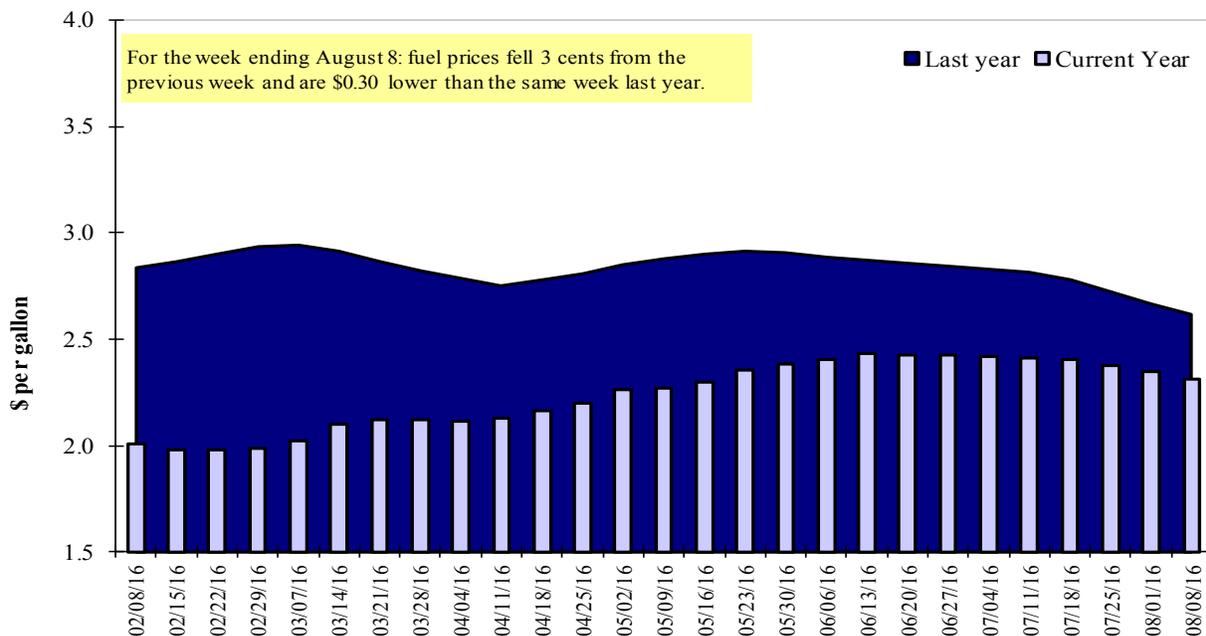
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
7/28/2016	2,475	571	1,889	1,082	127	6,143	8,592	6,248	20,983
This week year ago	1,412	930	1,997	1,045	193	5,577	5,579	1,960	13,116
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2015/16 YTD	1,550	378	1,356	635	26	3,946	40,443	46,181	90,570
2014/15 YTD	950	693	711	426	166	2,947	41,548	48,656	93,150
YTD 2015/16 as % of 2014/15	163	55	191	149	15	134	97	95	97
Last 4 wks as % of same period 2014/15	165	65	106	110	59	113	177	344	175
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 7/28/2016	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	1,508	10,523	11,896	(12)	9,244
Mexico	2,413	12,687	10,783	18	7,448
Korea	138	2,990	3,810	(22)	2,630
Colombia	166	4,649	4,379	6	1,727
Taiwan	200	2,228	1,918	16	1,224
<b>Top 5 Importers</b>	<b>4,425</b>	<b>33,077</b>	<b>32,786</b>	<b>1</b>	<b>22,273</b>
<b>Total US corn export sales</b>	<b>8,053</b>	<b>49,035</b>	<b>47,127</b>	<b>4</b>	<b>34,445</b>
% of Projected	15%	101%	99%		
Change from prior week	<b>896</b>	<b>331</b>	<b>(3)</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	55%	67%	70%		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 7/28/2016	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2012-2014
	2016/17 Next MY	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	3,981	28,585	29,784	(4)	24,211
Mexico	778	3,306	3,397	(3)	2,971
Indonesia	43	1,964	1,791	10	1,895
Japan	244	2,219	2,253	(2)	1,750
Taiwan	256	1,321	1,362	(3)	1,055
<b>Top 5 importers</b>	<b>5,301</b>	<b>37,395</b>	<b>38,587</b>	<b>(3)</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>10,954</b>	<b>52,429</b>	<b>50,616</b>	<b>4</b>	<b>39,169</b>
% of Projected	21%	107%	101%		
Change from prior week	<b>1,128</b>	<b>443</b>	<b>(447)</b>		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>48%</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 7/28/2016	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	830	692	20	2,743
Mexico	853	835	2	2,660
Nigeria	539	727	(26)	1,978
Philippines	876	613	43	2,156
Brazil	328	235	40	2,273
Korea	588	398	48	1,156
Taiwan	264	398	(34)	923
Indonesia	165	161	2	790
Colombia	308	176	75	664
Thailand	250	137	83	685
<b>Top 10 importers</b>	<b>4,751</b>	<b>4,235</b>	<b>12</b>	<b>16,028</b>
<b>Total US wheat export sales</b>	<b>10,089</b>	<b>8,524</b>	<b>18</b>	<b>24,059</b>
% of Projected	40%	40%		
Change from prior week	<b>327</b>	<b>838</b>		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>47%</b>	<b>50%</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 08/04/16	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	170	449	38	7,397	6,289	118	152	146	10,985
Corn	497	240	207	7,106	6,132	116	172	229	7,232
Soybeans	67	83	81	4,739	4,071	116	1803	5409	11,809
<b>Total</b>	<b>734</b>	<b>772</b>	<b>95</b>	<b>19,242</b>	<b>16,492</b>	<b>117</b>	<b>180</b>	<b>206</b>	<b>30,027</b>
<b>Mississippi Gulf</b>									
Wheat	43	119	36	2,214	2,708	82	60	47	4,504
Corn	715	687	104	19,282	18,532	104	119	155	26,701
Soybeans	811	496	163	12,374	11,562	107	377	630	29,593
<b>Total</b>	<b>1,568</b>	<b>1,302</b>	<b>120</b>	<b>33,871</b>	<b>32,802</b>	<b>103</b>	<b>153</b>	<b>187</b>	<b>60,797</b>
<b>Texas Gulf</b>									
Wheat	128	82	157	2,521	2,385	106	242	109	3,724
Corn	88	34	257	718	336	214	533	981	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
<b>Total</b>	<b>217</b>	<b>116</b>	<b>187</b>	<b>3,331</b>	<b>2,931</b>	<b>114</b>	<b>280</b>	<b>140</b>	<b>5,184</b>
<b>Interior</b>									
Wheat	31	27	118	772	867	89	84	102	1,388
Corn	91	153	59	4,176	3,665	114	110	149	6,201
Soybeans	51	78	65	2,387	1,962	122	169	261	3,518
<b>Total</b>	<b>173</b>	<b>258</b>	<b>67</b>	<b>7,335</b>	<b>6,494</b>	<b>113</b>	<b>119</b>	<b>162</b>	<b>11,106</b>
<b>Great Lakes</b>									
Wheat	22	26	84	417	441	95	73	142	997
Corn	30	3	961	219	329	66	46	114	485
Soybeans	55	47	118	148	89	167	559	1676	733
<b>Total</b>	<b>107</b>	<b>76</b>	<b>141</b>	<b>784</b>	<b>858</b>	<b>91</b>	<b>97</b>	<b>214</b>	<b>2,216</b>
<b>Atlantic</b>									
Wheat	2	2	86	192	418	46	16	10	520
Corn	0	0	n/a	14	99	14	0	0	277
Soybeans	38	3	1,155	980	966	101	298	741	2,053
<b>Total</b>	<b>40</b>	<b>6</b>	<b>705</b>	<b>1,185</b>	<b>1,483</b>	<b>80</b>	<b>73</b>	<b>53</b>	<b>2,850</b>
<b>U.S. total from ports**</b>									
Wheat	396	705	56	13,513	13,107	103	122	101	22,118
Corn	1,421	1,117	127	31,515	29,093	108	131	174	41,492
Soybeans	1,022	707	145	20,720	18,860	110	363	614	48,570
<b>Total</b>	<b>2,840</b>	<b>2,530</b>	<b>112</b>	<b>65,748</b>	<b>61,060</b>	<b>108</b>	<b>157</b>	<b>183</b>	<b>112,180</b>

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

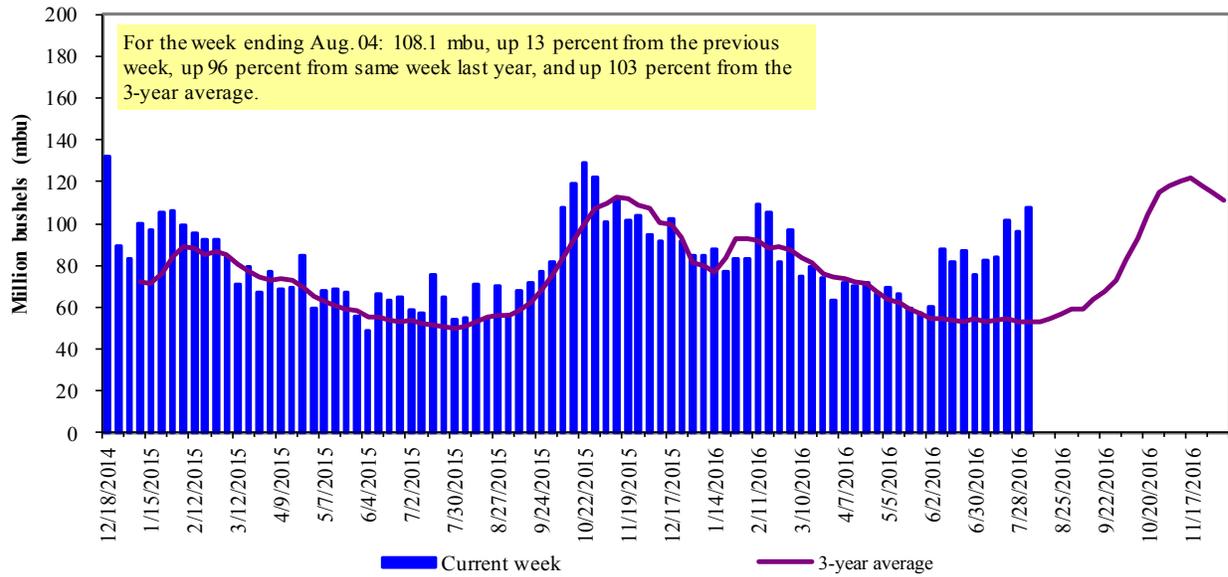
\*\*Total only includes regions shown above

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

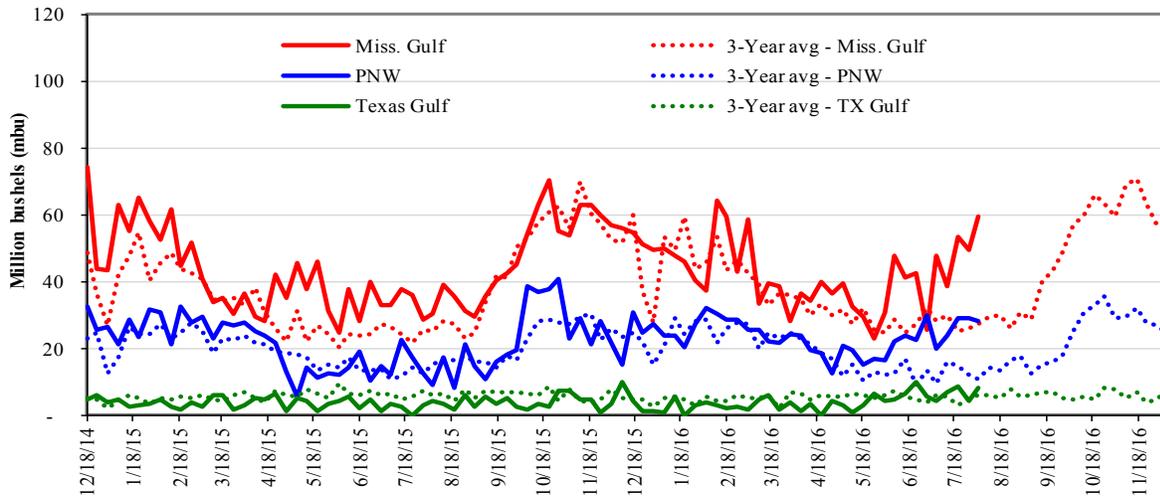
**U.S. grain inspected for export (wheat, corn, and soybeans)**



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 08/04/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	59.5	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	28.3	Last Year (same week):	up 20	up 88	up 25	down 2
Texas Gulf:	8.2	3-yr avg. (4-wk. mov. Avg):	up 95	up 87	up 94	up 216
			up 120	up 65	up 111	up 112

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

# Ocean Transportation

Table 17

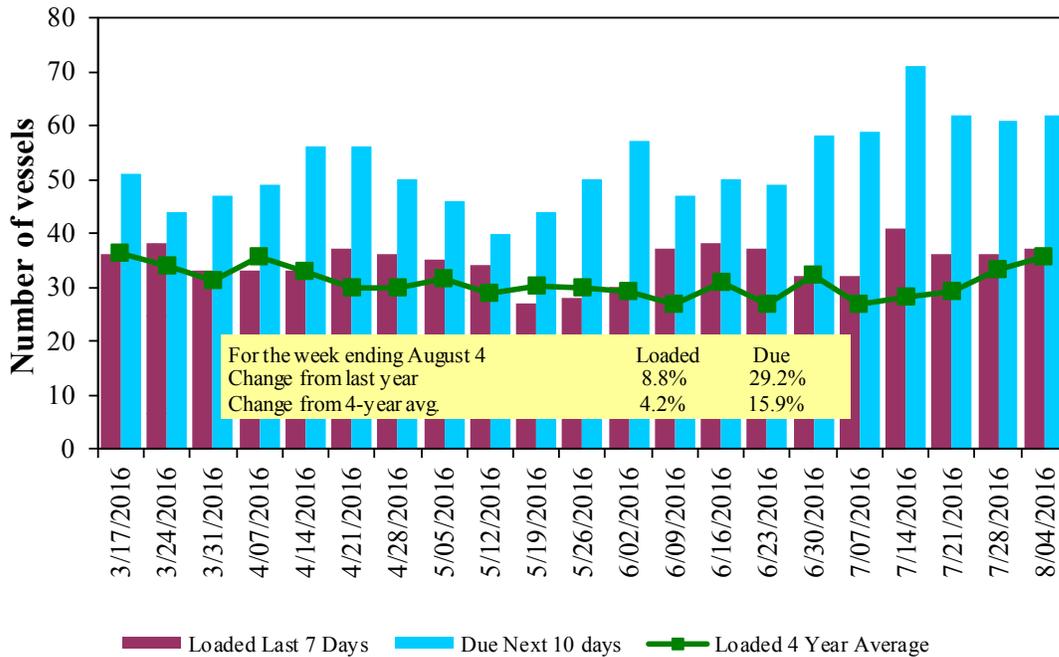
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/4/2016	57	37	62	18	n/a
7/28/2016	54	36	61	18	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

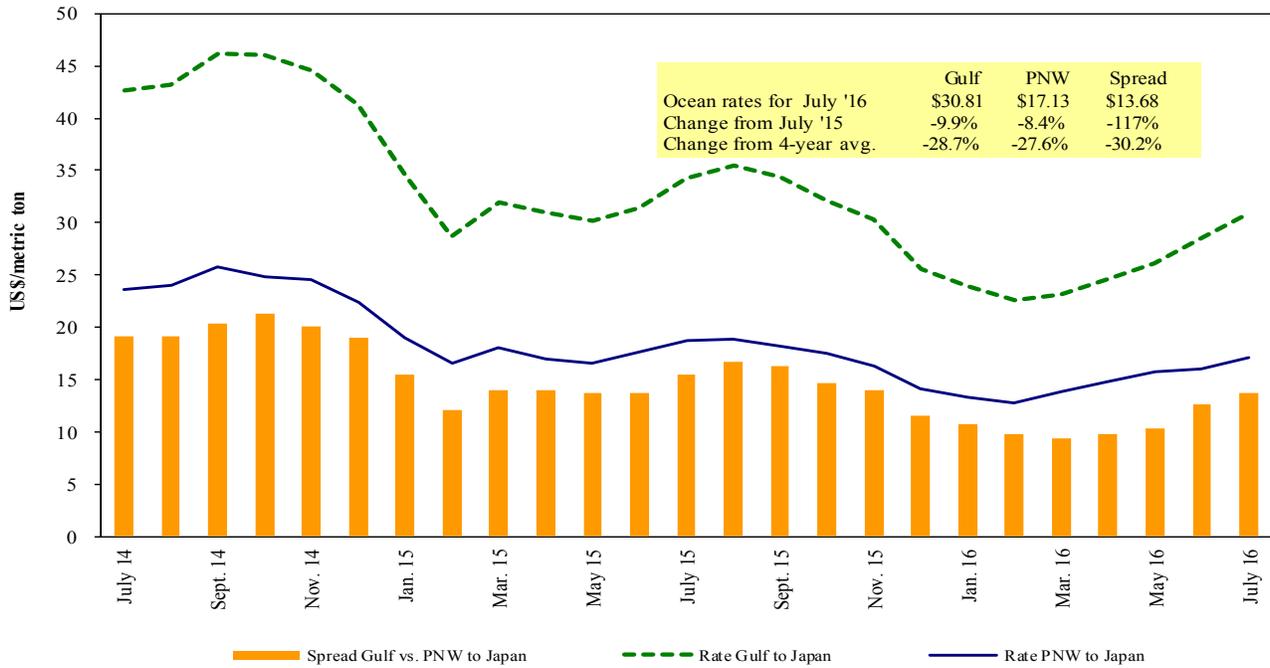
**U.S. Gulf<sup>d</sup> Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

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



Data Source: O'Neil Commodity Consulting

Table 18

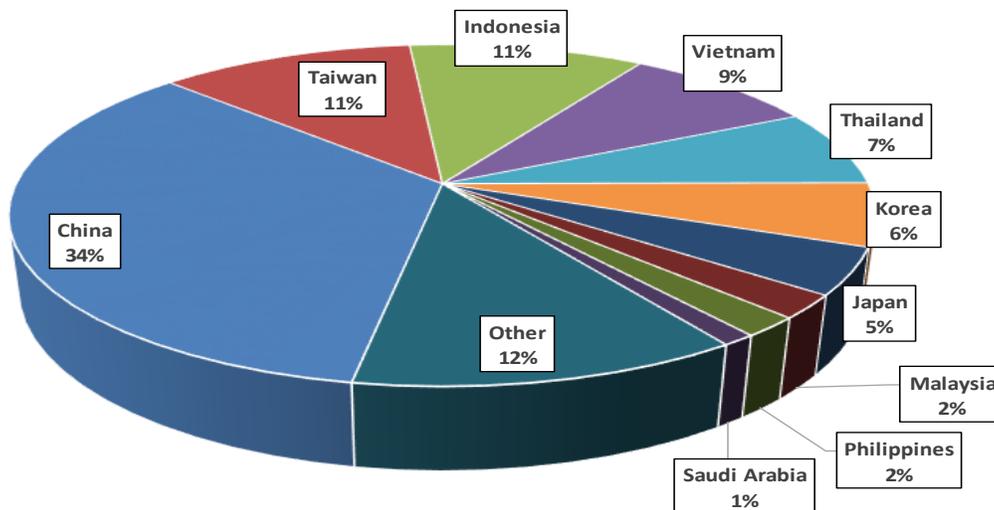
**Ocean Freight Rates For Selected Shipments, Week Ending 08/06/2016**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Aug 16/26	60,000	26.00
U.S. Gulf	China	Heavy Grain	Aug 10/20	60,000	26.25
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	Tanzania	Wheat <sup>1</sup>	June 20/29	13,000	35.67
U.S. Gulf	Djibouti	Wheat <sup>1</sup>	Aug 22/31	47,720	46.48
PNW	Japan	Heavy Grain	Aug 1/10	58,000	19.80
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	Taiwan	Wheat <sup>1</sup>	Sep 8/22	54,000	21.10
Albany	Me Gulf	Grain	Jun 17/25	53,000	13.85
Brazil	China	Heavy Grain	Aug 18/25	60,000	18.60
Brazil	China	Heavy Grain	Jun 28/Jul 4	60,000	18.00
Brazil	China	Heavy Grain	June 20/30	60,000	19.00
Brazil	Japan	Heavy Grain	Sep 1/30	62,000	19.00
Brazil	Malaysia	Heavy Grain	Sep 1/30	65,000	17.00
River Plate	China	Heavy Grain	Jun 23/30	60,000	22.60
Romania	France	Heavy Grain	Aug 5/9	55,000	8.50

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**

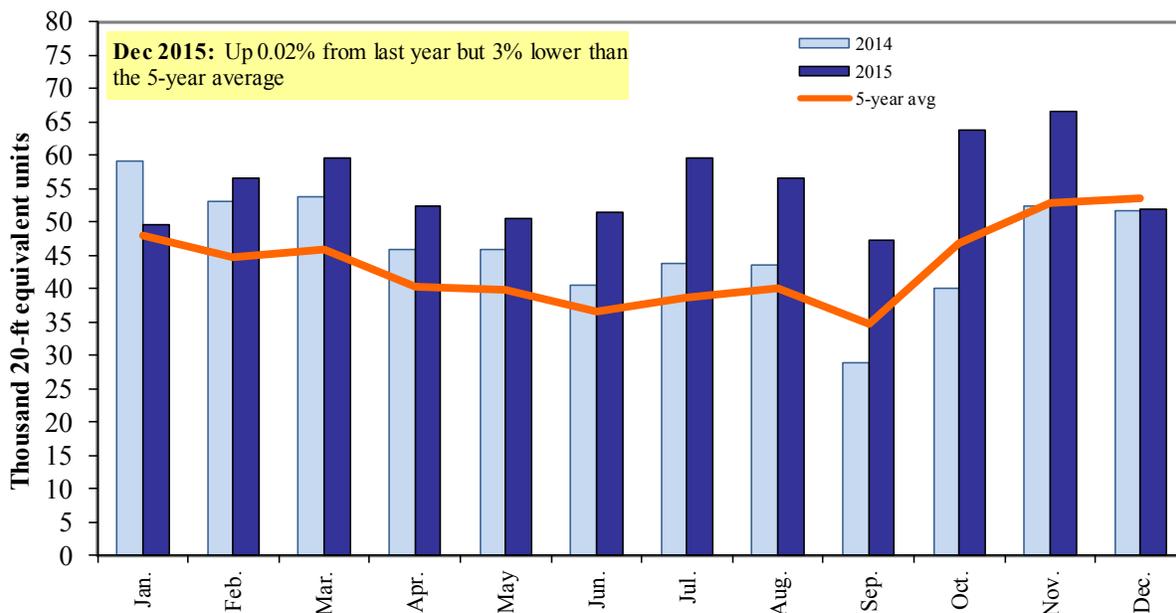


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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