USDA United States Department of Agriculture

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contact Us

August 13, 2015

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 August 20, 2015

WEEKLY HIGHLIGHTS

Total Inspections Continue to Decrease

For the week ending August 6, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 1.33 million metric tons (mmt), down 4 percent from the past week, 14 percent below last year, and 5 percent below the 3-year average. Despite the overall decrease, wheat inspections increased 15 percent from the previous week, with shipments increasing to Latin America and Africa. Increased wheat inspections also helped Mississippi Gulf inspections rise 5 percent from the previous week; and help the Texas Gulf inspections jump 45 percent. Corn and soybean inspections, however, decreased 10 and 11 percent from the past week. Outstanding (unshipped) export sales of wheat continued to increase while corn and soybean export sales decreased from the previous week.

Conference on Agricultural Transportation

The National Grain and Feed Association and the Soy Transportation Coalition, along with support from the U.S. Department of Agriculture, hosted their second "Ag Transportation Summit" in Rosemont, Illinois, August 5-6. With approximately 200 in attendance representing the major rail companies, shippers, ports, truckers, farmers, and government agencies, the theme behind the conference was overcoming challenges with respect to transportation capacity. Discussion panels stressed the urgent need to repair, replace, or upgrade the nation's aging transportation infrastructure to maintain a competitive advantage on freight costs and connect farmers to valuable markets. The next Ag Transportation Summit will be held in the summer of 2017.

Panama Canal Draft Restrictions

On August 7, the Panama Canal Authority (ACP) issued an advisory which set the maximum authorized transit draft at 11.89 meters (39.0 feet), effective September 8. Water levels in the Gatun and Alajuela Lakes, which feed water into the canal, are substantially below their seasonal average due to the regional drought effects of El Nino. According to the ACP, the effects of the restriction should be limited, since only 18.5 percent of vessels transiting the canal have drafts greater than 11.89 meters. However, the ACP anticipates possible further restrictions, effective September 15, of an 11.73 meter (38.5 foot) maximum authorized draft, if water levels remain low. The advisory states that four weeks advance notice will be given before implementation of further restrictions.

Snapshots by Sector

Export Sales

During the week ending July 30, **unshipped balances** of wheat, corn, and soybeans totaled 13.1 mmt, down 7 percent from the same time last year. Net weekly **wheat export sales** of .388 mmt down 44 percent from the prior week. **Corn export sales** were .027 mmt below the prior week, and **soybean net export sales** were .447 mmt below the past week.

Rail

U.S. Class I railroads originated 21,402 **carloads of grain** during the week ending August 1, down 3.1 percent from last week, up 10.3 percent from last year, and up 16.1 percent from the 3-year average.

During the week ending August 6, average August shuttle **secondary railcar bids/offers per car** were $189 below tariff, down $107 from last week, and $1,514 lower than last year. Non-shuttle secondary railcar bids/offers were $19 below tariff, down $6 from last week, and $1,844 lower than last year.

Barge

During the week ending August 8, **barge grain movements** totaled 946,562 tons—up 12 percent from last week, and up 25 percent from the same period last year.

During the week ending August 8, 615 grain barges **moved down river**, up 7.5 percent from last week; 530 grain barges were **unloaded in New Orleans**, up 15.5 percent from the previous week.

Ocean

During the week ending August 6, 54 **ocean-going grain vessels** were loaded in the Gulf, 69 percent more than the same period last year. Eighty vessels are expected to be loaded within the next 10 days, 63 percent more than the same period last year.

During the week ending August 7, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $34.50 per metric ton (mt), down 1 percent from the previous week. The cost of shipping from the PNW to Japan was $18.25 per mt, down 1 percent from the previous week.

Fuel

During the week ending August 10, U.S. average **diesel fuel prices** decreased 5 cents from the previous week to $2.62 per gallon—down $1.22 from the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 13, 2015. Web: http://dx.doi.org/10.9752/TS056.08-13-2015

Feature Article/Calendar

Second Quarter Wheat Transportation Costs Mixed; Landed Costs Down

In 2015, second quarter transportation costs were up slightly from the previous quarter for shipping U.S. wheat from Kansas and North Dakota to Japan through the Pacific Northwest (PNW) and U.S. Gulf, with the exception of Kansas to the PNW, which were down slightly. Quarter-to-quarter farm values for wheat, the lowest since second quarter of 2010, continued to fall, helping to push all landed costs down. Truck rates were unchanged during the second quarter, but ocean rates for shipping wheat through the PNW and U.S. Gulf continued to decrease, due primarily to excess vessel supply and low demand for vessels (***see GTR dated 7/16/2015****)*. Quarter-to-quarter rail rates for shipping wheat from each region were mostly up, but year-to-year rail rates were down for each route (*tables 1, 2*).

Quarter-to-quarter costs to ship wheat from Kansas through the PNW decreased 2 percent, but North Dakota costs were slightly higher. However, quarter-to-quarter transportation costs to ship wheat through the Gulf from Kansas increased 2 percent and North Dakota costs were up less than a percent. Year-to-year costs were down 12 to 20 percent for shipping from each state. More specifically, year-to-year transportation costs from Kansas and North Dakota through the Gulf were down 20 percent and 15 percent, respectively. Total landed costs for shipping wheat from Kansas and North Dakota through the PNW and Gulf to Japan continued to decrease from quarter to quarter and from year to year.

Table 1: Quarterly rate comparisons for shipping KS & ND wheat to Japan through the PNW

	KS					ND				
	2014	2015	2015	Year-to-Year	Quarterly	2014	2015	2015	Year-to-Year	Quarterly
Mode	2nd qtr	1st qtr	2nd qtr	change	change	2nd qtr	1st qtr	2nd qtr	change	change
	$/metric ton			%	%	$/metric ton			%	%
Truck	14.59	12.02	12.01	-17.68	-0.08	14.59	12.02	12.01	-17.68	-0.08
Rail[1]	56.16	56.26	55.39	-1.37	-1.55	56.32	54.50	55.58	-1.31	1.98
Ocean vessel	25.25	17.83	17.04	-32.51	-4.43	25.25	17.83	17.04	-32.51	-4.43
Transportation Costs	96.00	86.11	84.44	-12.04	-1.94	96.16	84.35	84.63	-11.99	0.33
Farm Value[2]	266.64	202.46	193.15	-27.56	-4.60	245.45	213.11	193.27	-21.26	-9.31
Total Landed Cost	362.64	288.57	277.59	-23.45	-3.80	341.61	297.46	277.90	-18.65	-6.58
Transport % of landed cost	26.47	29.84	30.42			28.15	28.36	30.45		

Table 2: Quarterly rate comparisons for shipping KS & ND wheat to Japan through the Gulf

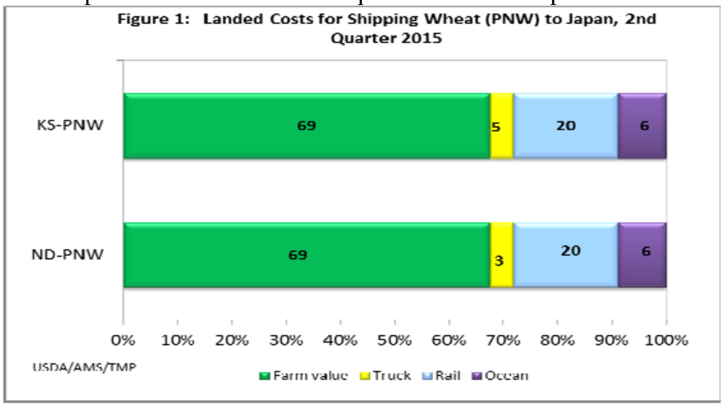
	KS					ND				
	2014	2015	2015	Year-to-Year	Quarterly	2014	2015	2015	Year-to-Year	Quarterly
Mode	2nd qtr	1st qtr	2nd qtr	change	change	2nd qtr	1st qtr	2nd qtr	change	change
	$/metric ton			%	%	$/metric ton			%	%
Truck	14.59	12.02	12.01	-17.68	-0.08	14.59	12.02	12.01	-17.68	-0.08
Rail[1]	40.28	35.94	38.09	-5.44	5.98	66.34	63.82	64.80	-2.32	1.54
Ocean vessel	46.39	31.71	30.86	-33.48	-2.68	46.39	31.71	30.86	-33.48	-2.68
Transportation Costs	101.26	79.67	80.96	-20.05	1.62	127.32	107.55	107.67	-15.43	0.11
Farm Value[2]	266.64	202.46	193.15	-27.56	-4.60	245.45	213.11	193.27	-21.26	-9.31
Total Landed Cost	367.90	282.13	274.11	-25.49	-2.84	372.77	320.66	300.94	-19.27	-6.15
Transport % of landed cost	27.52	28.24	29.54			34.16	33.54	35.78		

Source: USDA/AMS/TMP

[1] 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

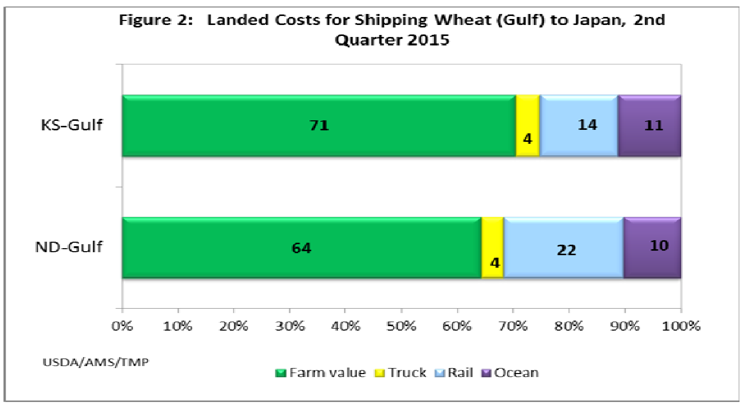
[2] Source: USDA/NASS, wheat prices for North Dakota (mainly HRS) and Kansas (mainly HRW)

PNW Cost Analysis: The total landed cost (farm value plus transportation costs) to ship from each state through the PNW averaged $278 per metric ton (mt) during the second quarter (*see table 1*). Compared to the previous quarter, PNW total landed costs for shipping wheat to Japan decreased 4 percent from Kansas and 7 percent from North Dakota (*see table 1*). In addition, year-to-year landed costs were down 23 and 19 percent from Kansas and North Dakota, respectively. Farm values averaged 69 percent of the landed cost for shipping from Kansas and from North Dakota, which was below last year's shares (*see figure 1*). Ocean rates for shipping grain from the PNW to Japan continued to fall, decreasing 4 percent quarter to quarter, due to slower demand for bulk shipments and excess vessel supply (***GTR dated 7/16/15***). PNW ocean rates were down 33 percent from year to year. Quarter-to-quarter rail rates for shipping wheat from Kansas to the PNW decreased 2 percent, but increased 2 percent from North Dakota. Year-to-year rail rates decreased 1 percent for each state, as fuel surcharges continued to fall. Truck rates remained the same from quarter to quarter but dropped 18 percent year to year because of lower fuel prices and as demand for U.S. wheat remained low due to increased competition abroad. Second quarter PNW transportation costs represented 30 percent of the total landed costs from Kansas and North Dakota, up from the previous quarter and last year (*see table 1*).



Gulf Cost Analysis: Quarter-to-quarter total landed costs to ship wheat from Kansas and North Dakota through the Gulf during the second quarter decreased 3 percent and 6 percent. Year-to-year landed costs, were down 25 percent for shipping wheat from Kansas and down 19 percent from North Dakota (*see table 2*). The total landed cost to ship from each State through the Gulf was $274 to $301/mt. Year-to-year wheat farm value's share of the landed cost decreased to 71 percent for Kansas and 64 percent for North Dakota (*see figure 2*).

Ocean rates for shipping wheat to Japan from the Gulf decreased 3 percent quarter to quarter and 33 percent from year to year. Quarter-to-quarter rail rates to the Gulf from Kansas and North Dakota increased 6 percent and 2 percent, respectively. However, the year to year comparison shows that rail rates to ship wheat from Kansas and North Dakota to the Gulf decreased 5 percent and 2 percent, respectively. Second quarter Gulf transportation costs were 30 to 36 percent of the total landed costs, up from the previous quarter and last year (*see table 2*).



PNW vs. Gulf Cost Comparison: Quarter-to-quarter rail rates to ship wheat from Kansas and North Dakota increased for each route, except for Kansas to PNW rail rates, which decreased slightly. Year-to-year rail rates for shipping wheat from each state were down (*see tables 1 and 2*). Quarter-to-quarter ocean rates continued to fall for shipping through the Gulf and from the PNW. Year-to-year ocean rates were down for shipping from each region as well, dropping over 30 percent for each region. The total landed costs to ship wheat from North Dakota and Kansas from the PNW were about the same, but North Dakota landed costs from the Gulf remained above Kansas landed costs (*tables 1, 2*).

According to USDA's Grain Inspections, Packers and Stockyards Administration, second quarter wheat inspected for export to Japan totaled 0.576 million metric tons (mmt), 37 percent below the second quarter last year and 35 percent below the first quarter of 2015. According to USDA's Foreign Agricultural Service, second-quarter wheat exports to Japan accounted for 11 percent of total second-quarter wheat exports (5.43 mmt), which were down 29 percent from last year. During the second quarter of 2015, Japan was the second highest importer of U.S. wheat, behind Mexico. According to the USDA's August World Agricultural Supply and Demand Estimates report, U.S. wheat exports for 2015/16 are expected to increase 8 percent from the previous year. Higher U.S. stocks and reduced competition from Canada and the European Union helped demand for U.S. wheat to improve. *Johnny.Hill@ams.usda.gov*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
Week ending		Unit Train	Shuttle		Gulf	Pacific
08/12/15	176	251	204	187	154	129
08/05/15	179	255	209	182	157	131

[1]Indicator: Base year 2000 = 100; Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market bid and monthly tariff ra
with fuel surcharge ($/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

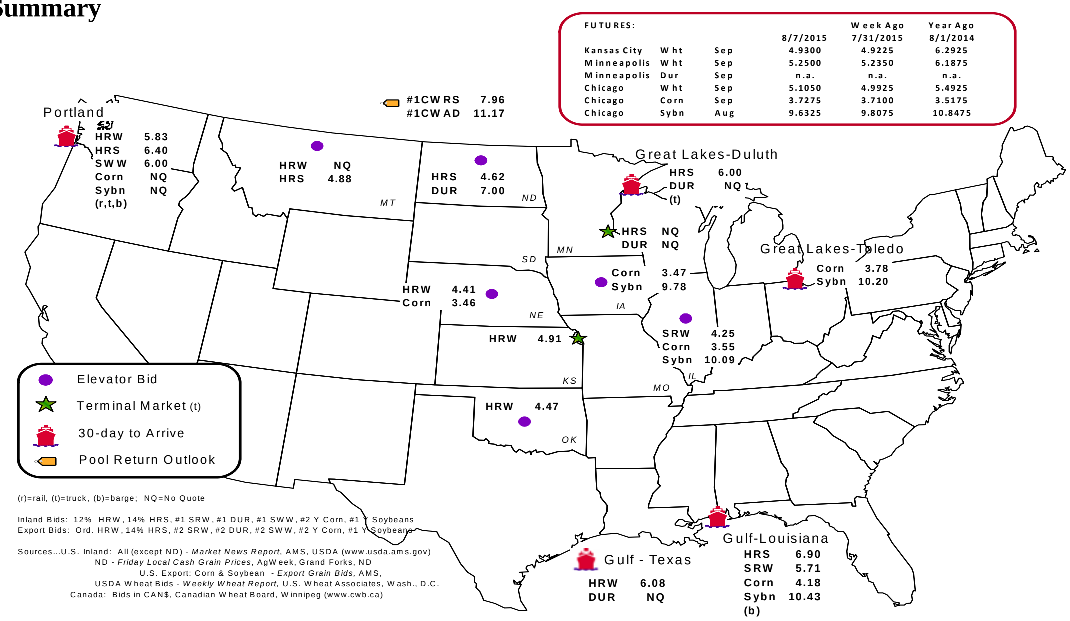
Market Update: U.S. Origins to Export Position Price Spreads ($/bushel)

Commodity	Origin--Destination	8/7/2015	7/31/2015
Corn	IL--Gulf	-0.63	-0.68
Corn	NE--Gulf	-0.72	-0.79
Soybean	IA--Gulf	-0.65	-1.13
HRW	KS--Gulf	-1.17	-1.10
HRS	ND--Portland	-1.78	-1.79

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)[1]

Week ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
8/05/2015[p]	56	808	2,767	72	3,703	8/1/2015	1,728
7/29/2015[r]	113	528	2,876	194	3,711	7/25/2015	1,844
2015 YTD[r]	12,544	37,284	129,015	14,526	193,369	2015 YTD	54,836
2014 YTD[r]	20,571	50,546	138,829	16,791	226,737	2014 YTD	58,969
2015 YTD as % of 2014 YTD	61	74	93	87	85	% change YTD	93
Last 4 weeks as % of 2014[2]	258	39	84	105	75	Last 4wks % 2014	94
Last 4 weeks as % of 4-year avg.[2]	98	47	101	125	88	Last 4wks % 4 yr	110
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2013 and prior 4-year average.

[3] Cross- border weekly data is aproximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

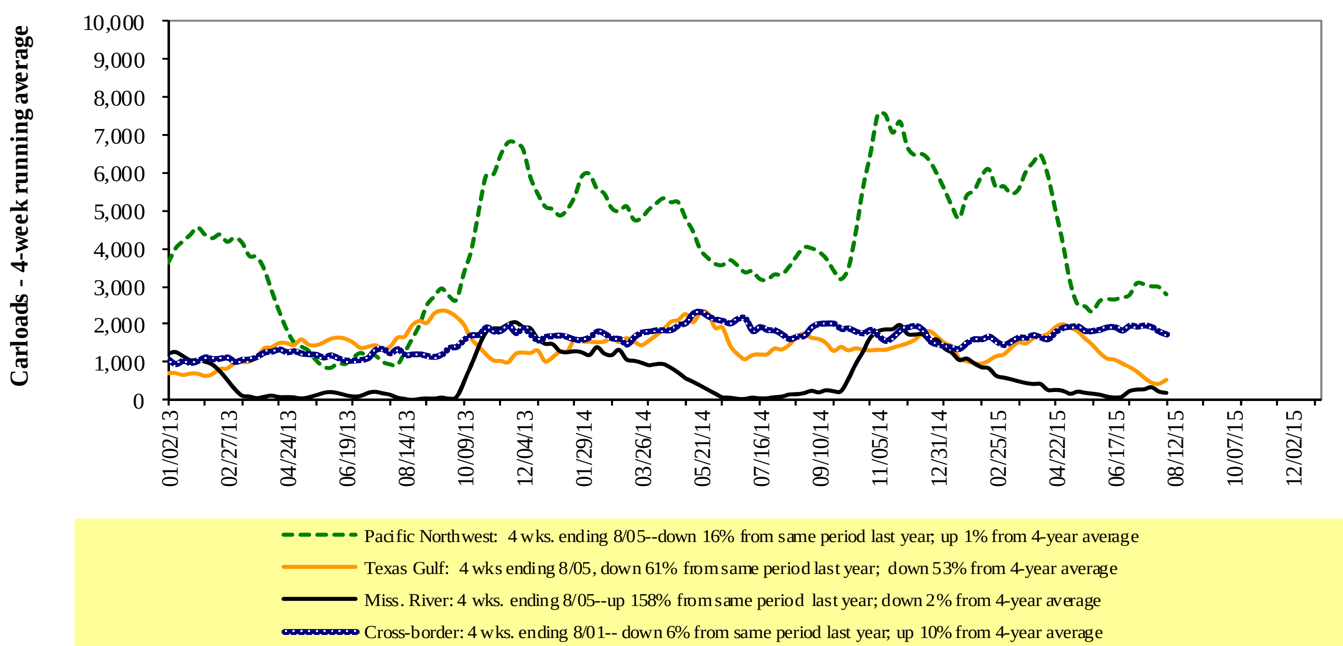
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

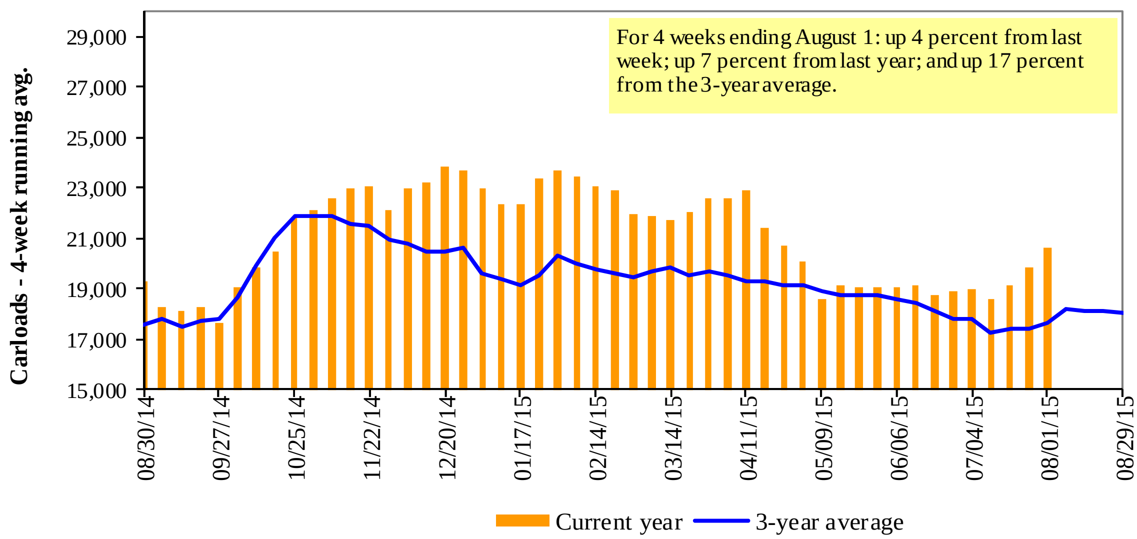
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
08/01/15	2,180	2,629	10,366	848	5,379	21,402	3,485	4,541
This week last year	1,546	3,253	7,942	462	6,195	19,398	4,288	5,125
2015 YTD	61,768	89,610	294,994	26,043	154,440	626,855	123,149	132,470
2014 YTD	56,366	88,499	260,613	25,042	170,620	601,140	132,643	158,668
2015 YTD as % of 2014 YTD	110	101	113	104	91	104	93	83
Last 4 weeks as % of 2014[1]	113	91	124	128	88	107	89	87
Last 4 weeks as % of 3-yr avg.[2]	145	98	119	147	107	115	107	87
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

[1]The past 4 weeks of this year as a percent of the same 4 weeks last year.

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

Figure 3

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



Source: Association of American Railroads

Table 5

Railcar Auction Offerings[1] ($/car)[2]

Week ending	Delivery period							
8/6/2015	Aug-15	Aug-14	Sep-15	Sep-14	Oct-15	Oct-14	Nov-15	Nov-14
BNSF[3]								
COT grain units	47	no offer	16	no offer	5	3030	no bids	2492
COT grain single-car[5]	0 . . 100	no offer	0 . . 10	no offer	31	no offer	2 . . 11	336 . . 2201
UP[4]								
GCAS/Region 1	no bids	no offer	no bids	527	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no offer	no bids	1255	10	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.

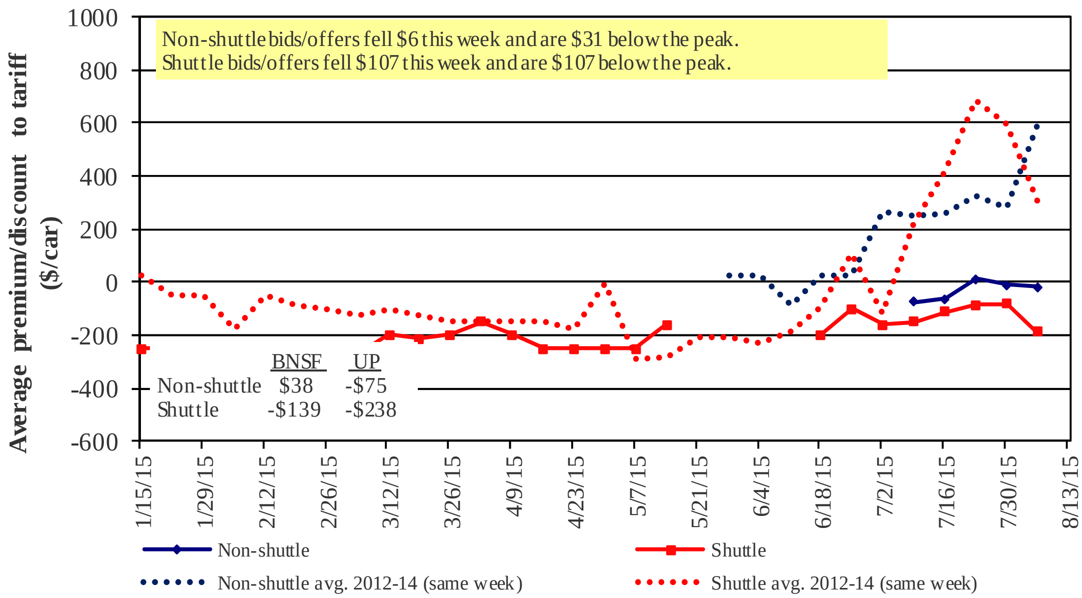
[5]Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing 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 2015, Secondary Market

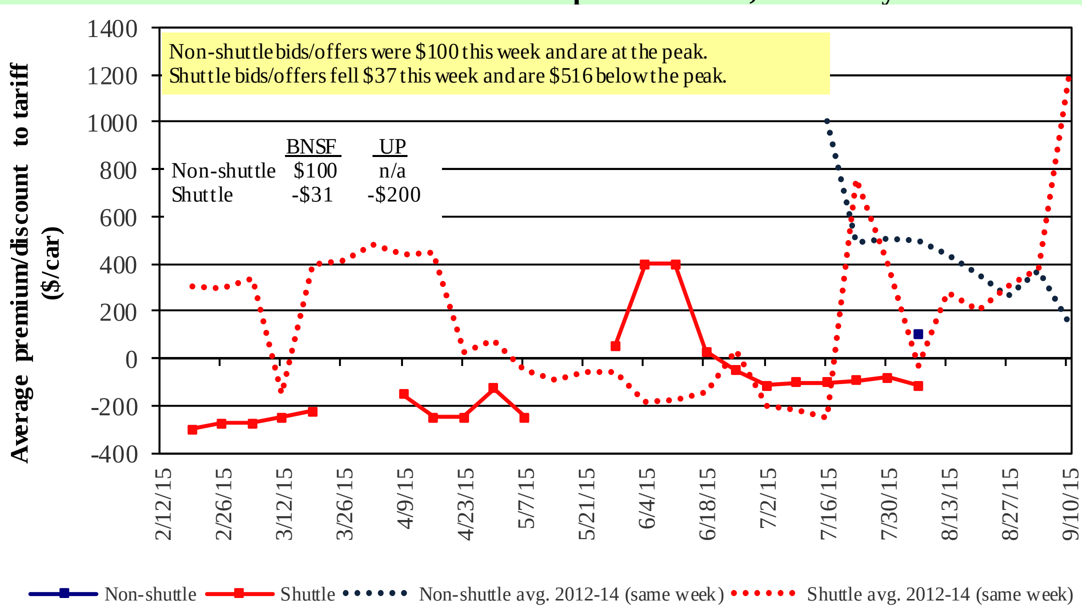


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

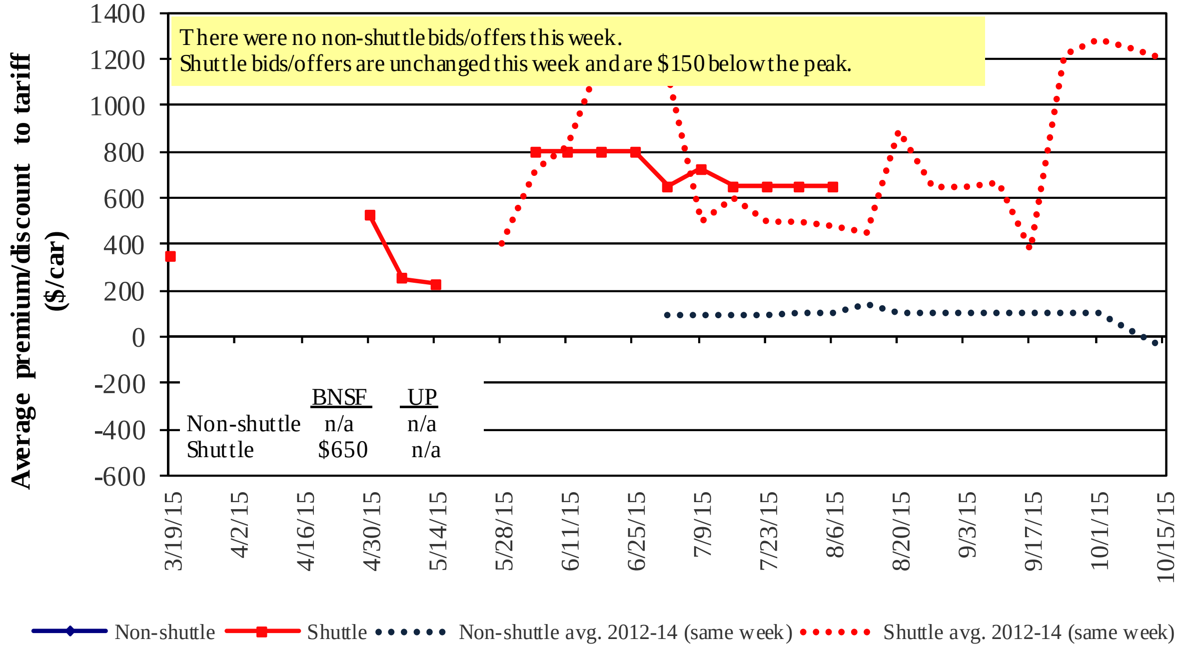


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Railcar Market ($/car)[1]

Week ending	Delivery period					
8/6/2015	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16
Non-shuttle						
BNSF-GF	38	100	n/a	n/a	n/a	n/a
Change from last week	(12)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(2,362)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(75)	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(1,325)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(139)	(31)	650	n/a	n/a	n/a
Change from last week	(89)	(48)	-	n/a	n/a	n/a
Change from same week 2014	(2,589)	n/a	(4,850)	n/a	n/a	n/a
UP-Pool	(238)	(200)	n/a	n/a	n/a	n/a
Change from last week	(125)	(25)	n/a	n/a	n/a	n/a
Change from same week 2014	(438)	(525)	n/a	n/a	n/a	n/a

[1]Average premium/discount to tariff, $/car-last week

[2]Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

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

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

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments[1]

Effective date: 8/1/2015	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,605	$81	$36.60	$1.00	3
	Grand Forks, ND	Duluth-Superior, MN	$4,143	$30	$41.44	$1.13	13
	Wichita, KS	Los Angeles, CA	$6,950	$153	$70.54	$1.92	5
	Wichita, KS	New Orleans, LA	$4,243	$142	$43.55	$1.19	1
	Sioux Falls, SD	Galveston-Houston, TX	$6,486	$126	$65.66	$1.79	5
	Northwest KS	Galveston-Houston, TX	$4,511	$156	$46.35	$1.26	0
	Amarillo, TX	Los Angeles, CA	$4,710	$217	$48.93	$1.33	-1
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,328	$161	$34.65	$0.88	-2
	Toledo, OH	Raleigh, NC	$5,555	$0	$55.16	$1.40	9
	Des Moines, IA	Davenport, IA	$2,168	$34	$21.87	$0.56	2
	Indianapolis, IN	Atlanta, GA	$4,761	$0	$47.28	$1.20	9
	Indianapolis, IN	Knoxville, TN	$4,104	$0	$40.75	$1.04	12
	Des Moines, IA	Little Rock, AR	$3,308	$100	$33.84	$0.86	-1
	Des Moines, IA	Los Angeles, CA	$4,852	$292	$51.08	$1.30	-13
Soybeans	Minneapolis, MN	New Orleans, LA	$3,799	$149	$39.20	$1.07	1
	Toledo, OH	Huntsville, AL	$4,676	$0	$46.43	$1.26	17
	Indianapolis, IN	Raleigh, NC	$5,625	$0	$55.86	$1.52	9
	Indianapolis, IN	Huntsville, AL	$4,368	$0	$43.38	$1.18	22
	Champaign-Urbana, IL	New Orleans, LA	$3,974	$161	$41.06	$1.12	0
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	$88	$40.13	$1.09	1
	Wichita, KS	Galveston-Houston, TX	$3,919	$69	$39.60	$1.08	7
	Chicago, IL	Albany, NY	$4,723	$0	$46.90	$1.28	9
	Grand Forks, ND	Portland, OR	$5,611	$152	$57.23	$1.56	1
	Grand Forks, ND	Galveston-Houston, TX	$6,532	$158	$66.44	$1.81	1
	Northwest KS	Portland, OR	$5,478	$256	$56.94	$1.55	-2
Corn	Minneapolis, MN	Portland, OR	$5,180	$185	$53.28	$1.35	-5
	Sioux Falls, SD	Tacoma, WA	$5,130	$170	$52.63	$1.34	-5
	Champaign-Urbana, IL	New Orleans, LA	$3,147	$161	$32.85	$0.83	-2
	Lincoln, NE	Galveston-Houston, TX	$3,610	$99	$36.83	$0.94	-4
	Des Moines, IA	Amarillo, TX	$3,690	$126	$37.89	$0.96	-2
	Minneapolis, MN	Tacoma, WA	$5,180	$184	$53.26	$1.35	-5
	Council Bluffs, IA	Stockton, CA	$4,600	$190	$47.57	$1.21	-6
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,690	$170	$58.19	$1.58	-4
	Minneapolis, MN	Portland, OR	$5,710	$185	$58.54	$1.59	-5
	Fargo, ND	Tacoma, WA	$5,580	$151	$56.91	$1.55	-4
	Council Bluffs, IA	New Orleans, LA	$4,425	$186	$45.79	$1.25	0
	Toledo, OH	Huntsville, AL	$3,851	$0	$38.24	$1.04	22
	Grand Island, NE	Portland, OR	$5,360	$262	$55.83	$1.52	-2

[1]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.

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

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

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

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

Table 8

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

Effective date: 8/1/2015				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y[4]
Wheat	MT	Chihuahua, CI	$7,648	$161	$79.79	$2.17	11
	OK	Cuautitlan, EM	$6,714	$195	$70.59	$1.92	-2
	KS	Guadalajara, JA	$7,159	$189	$75.07	$2.04	-3
	TX	Salinas Victoria, NL	$4,086	$74	$42.50	$1.16	2
Corn	IA	Guadalajara, JA	$8,427	$222	$88.37	$2.24	-1
	SD	Celaya, GJ	$7,780	$210	$81.64	$2.07	-5
	NE	Queretaro, QA	$7,618	$197	$79.86	$2.03	-3
	SD	Salinas Victoria, NL	$6,035	$160	$63.30	$1.61	-4
	MO	Tlalnepantla, EM	$6,963	$192	$73.11	$1.86	-3
	SD	Torreon, CU	$7,050	$176	$73.83	$1.87	-2
Soybeans	MO	Bojay (Tula), HG	$8,365	$187	$87.38	$2.38	0
	NE	Guadalajara, JA	$8,929	$214	$93.42	$2.54	-1
	IA	El Castillo, JA	$9,270	$209	$96.85	$2.63	-1
	KS	Torreon, CU	$7,226	$133	$75.19	$2.04	0
Sorghum	TX	Guadalajara, JA	$7,150	$137	$74.45	$1.89	-2
	NE	Celaya, GJ	$7,404	$191	$77.60	$1.97	-4
	KS	Queretaro, QA	$7,255	$120	$75.35	$1.91	4
	NE	Salinas Victoria, NL	$5,883	$141	$61.54	$1.56	3
	NE	Torreon, CU	$6,662	$157	$69.67	$1.77	0

[1]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.

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

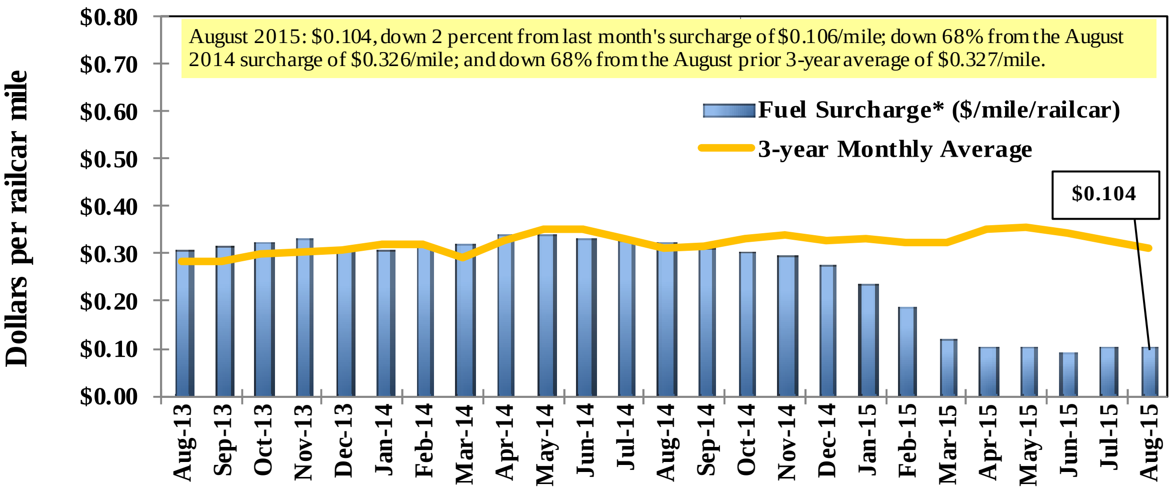
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[4]Percentage change year over year calculated using tariff rate plus fuel surchage

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal. starting March 1, 2011.

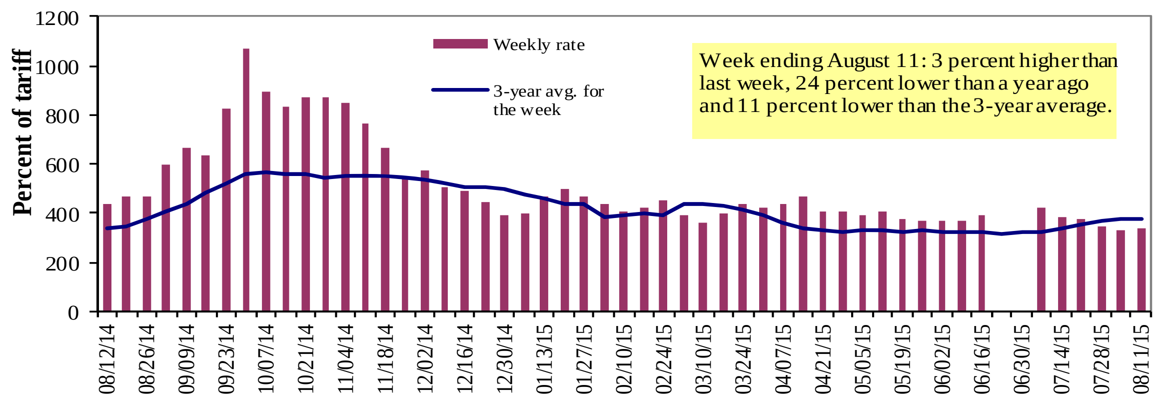
*** CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.

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]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]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
Rate[1]	8/11/2015	403	347	337	243	283	283	235
	8/4/2015	392	347	328	245	293	293	212
$/ton	8/11/2015	24.95	18.46	15.64	9.70	13.27	11.43	7.38
	8/4/2015	24.26	18.46	15.22	9.78	13.74	11.84	6.66
Current week % change from the same week:								
	Last year	-36	-26	-24	-37	-36	-36	-38
	3-year avg. [2]	-11	-13	-11	-25	-19	-19	-22
Rate[1]	September	517	467	492	450	483	483	492
	November	592	517	492	425	467	467	383

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds; missing data due to flooding

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.

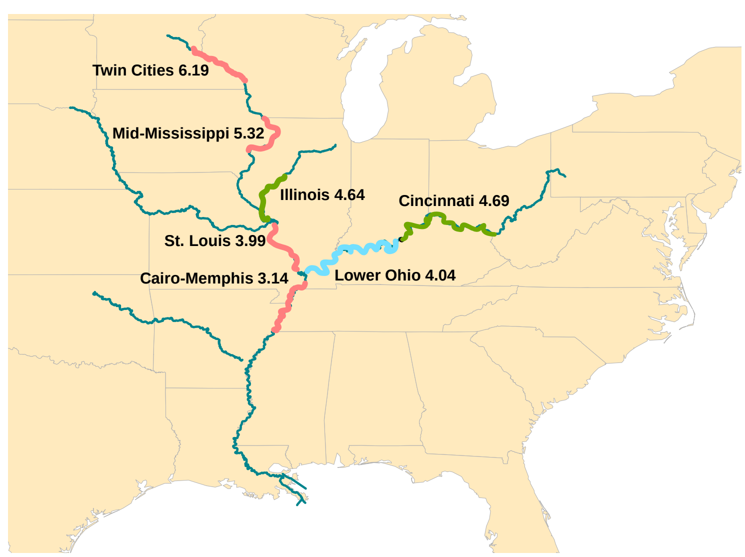
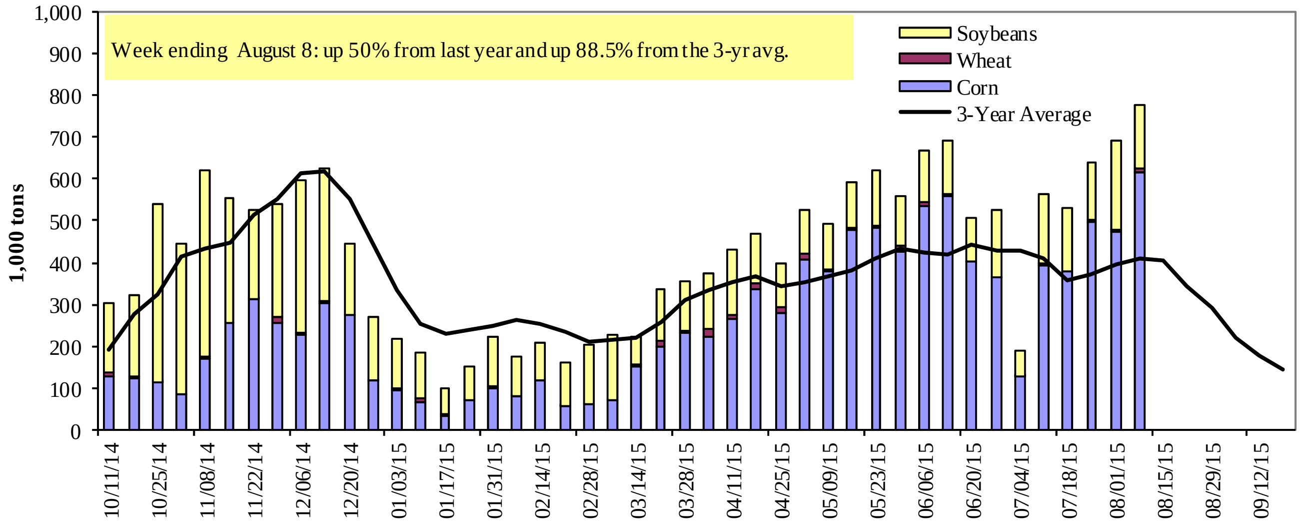


Figure 10

Barge Movements on the Mississippi River[1] (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)

Week ending 08/8/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	274	5	89	5	373
Winfield, MO (L25)	337	5	85	5	432
Alton, IL (L26)	637	6	171	5	819
Granite City, IL (L27)	617	6	153	5	782
Illinois River (L8)	175	3	31	0	210
Ohio River (L52)	36	55	16	0	106
Arkansas River (L1)	0	51	7	0	58
Weekly total - 2015	653	112	176	5	947
Weekly total - 2014	587	94	78	0	759
2015 YTD[1]	13,351	1,063	6,298	143	20,855
2014 YTD	14,276	1,576	4,700	123	20,676
2015 as % of 2014 YTD	94	67	134	116	101
Last 4 weeks as % of 2014[2]	112	69	242	270	121
Total 2014	20,693	2,181	11,813	258	34,946

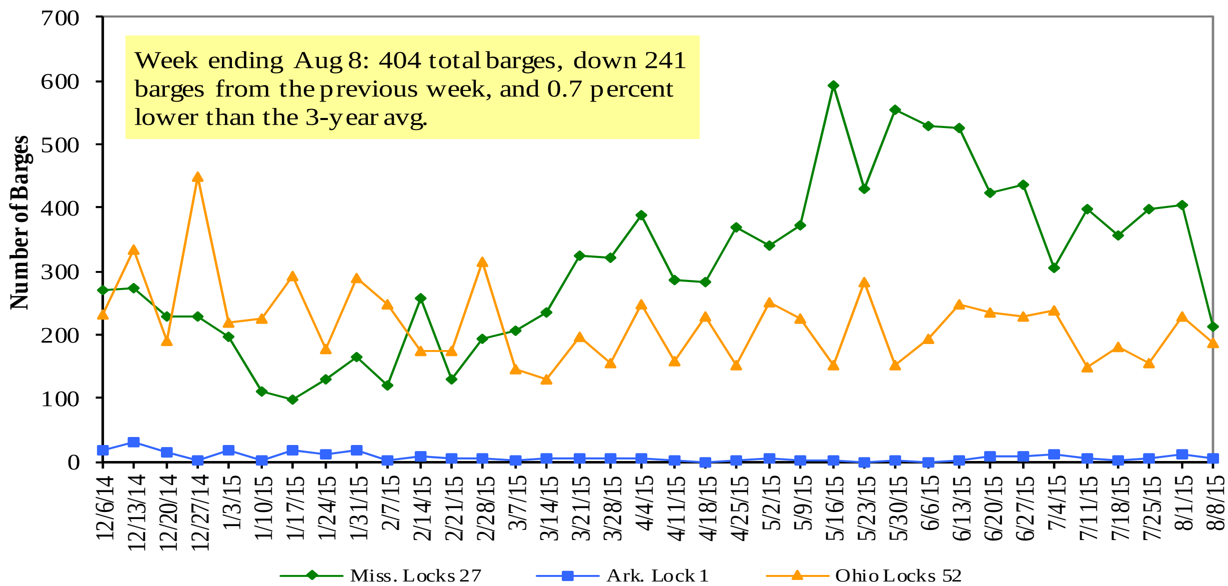
[1] Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding
Source: U.S. Army Corps of Engineers

Figure 11

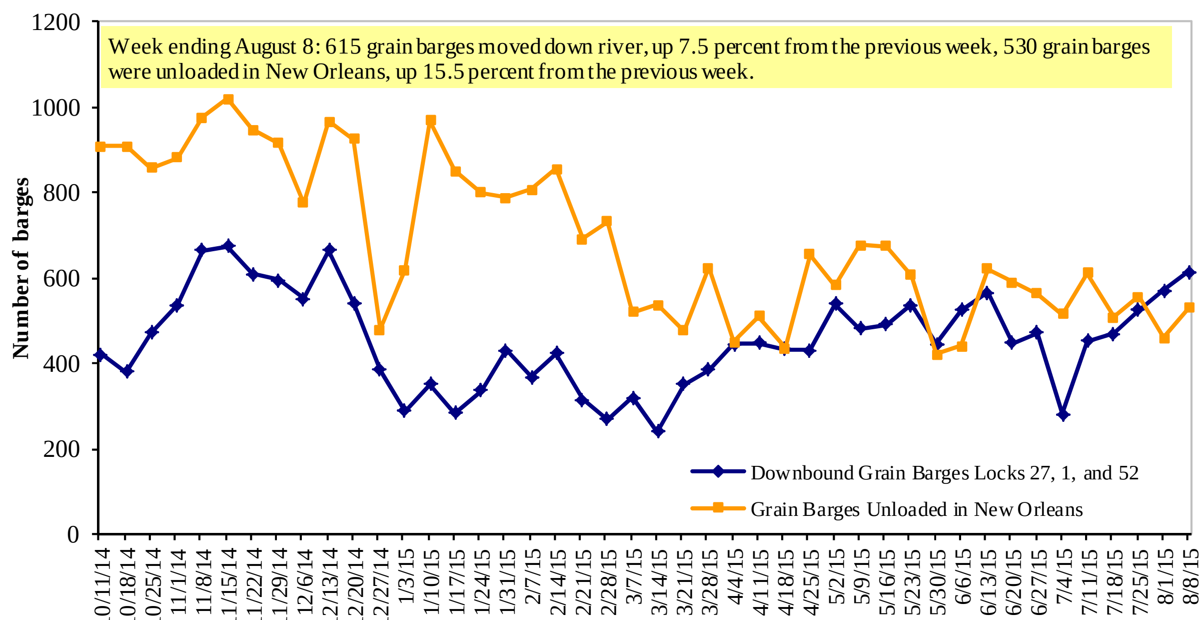
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12

Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices[1], Week Ending 8/10/2015 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.713	-0.056	-1.174
	New England	2.847	-0.048	-1.135
	Central Atlantic	2.832	-0.053	-1.142
	Lower Atlantic	2.595	-0.059	-1.205
II	Midwest[2]	2.515	-0.046	-1.272
III	Gulf Coast[3]	2.487	-0.049	-1.263
IV	Rocky Mountain	2.640	-0.045	-1.236
V	West Coast	2.846	-0.060	-1.170
	West Coast less California	2.706	-0.055	-1.229
	California	2.960	-0.064	-1.124
Total	U.S.	2.617	-0.051	-1.226

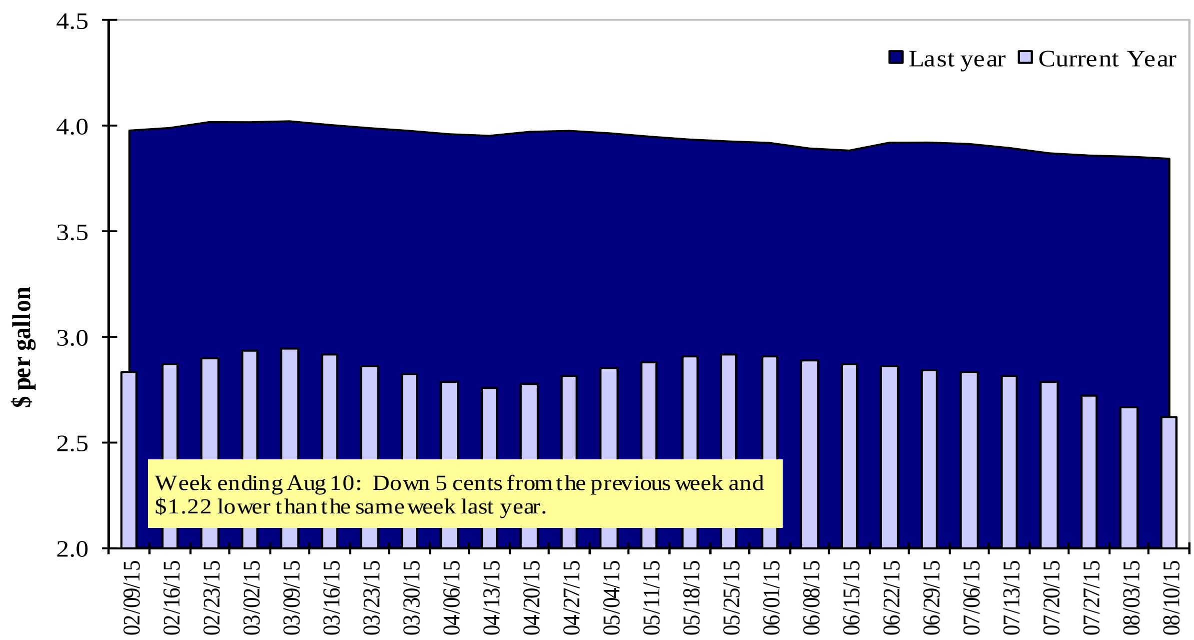
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (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)

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
7/30/2015	1,412	930	1,997	1,045	193	5,577	5,579	1,960	13,116
This week year ago	1,893	1,188	2,049	1,085	134	6,349	5,730	2,120	14,199
Cumulative exports-marketing year[2]									
2014/15 YTD	950	693	711	426	166	2,947	41,548	46,682	91,177
2013/14 YTD	1,329	745	1,265	577	53	3,969	43,006	43,999	90,974
YTD 2014/15 as % of 2013/14	71	93	56	74	313	74	97	106	100
Last 4 wks as % of same period 2013/14	65	75	85	91	141	79	121	113	101
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

[1] Current unshipped export sales to date

[2] Shipped export sales to date; new marketing year 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)

Table 13

Top 5 Importers[1] of U.S. Corn

Week ending 07/30/2015	**Total Commitments[2]** 2015/16 Next MY	2014/15 Current MY	2013/14 Last MY	**% change current MY from last MY**	**Exports[3] 3-year avg 2011-2013**
		- 1,000 mt -			- 1,000 mt -
Japan	864	11,896	11,480	4	10,079
Mexico	2,242	10,783	10,627	1	8,145
Korea	1	3,810	4,568	(17)	2,965
Colombia	78	4,379	3,303	33	3,461
Taiwan	34	1,918	2,042	(6)	1,238
Top 5 Importers	**3,219**	**32,786**	**32,019**	**2**	**25,887**
Total US corn export sales	**4,575**	**47,127**	**48,736**	**(3)**	**34,445**
% of Projected	10%	100%	100%		
Change from prior week	**277**	**(3)**	**121**		
Top 5 importers' share of U.S. corn export sales	70%	70%	66%		75%
USDA forecast, July 2015	**47,628**	**46,993**	**48,695**	**(3)**	
Corn Use for Ethanol USDA forecast, July 2015	**132,715**	**132,080**	**130,404**	**1**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports - 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/

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

Table 14

Top 5 Importers[1] of U.S. Soybeans

Week Ending 07/30/2015	Total Commitments[2] 2015/16 Next MY	2014/15 Current MY	2013/14 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
		- 1,000 mt -			- 1,000 mt -
China	3,270	29,784	28,073	6	24,211
Mexico	744	3,397	3,273	4	2,971
Indonesia	49	1,791	1,389	29	1,895
Japan	356	2,253	1,904	18	1,750
Taiwan	142	1,362	1,325	3	1,055
Top 5 importers	**4,559**	**38,587**	**35,963**	**7**	**31,882**
Total US soybean export sales	**9,016**	**50,642**	**46,119**	**10**	**39,169**
% of Projected	19%	103%	103%		
Change from prior week	1,024	(447)	95		
Top 5 importers' share of U.S. soybean export sales	51%	76%	78%		**81%**
USDA forecast, July 2015	**48,308**	**49,260**	**44,824**	**10**	

(n) indicates negative number.

[1]Based on FAS Marketing Year Ranking Reports - 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/

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers[1] of All U.S. Wheat

Week Ending 07/30/2015	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2012-2014
	- 1,000 mt -			- 1,000 mt -
Japan	692	1,070	(35)	3,113
Mexico	835	1,240	(33)	2,807
Nigeria	727	994	(27)	2,512
Philippines	613	729	(16)	2,105
Brazil	235	1,084	(78)	2,091
Korea	398	634	(37)	1,273
Taiwan	398	410	(3)	1,007
Indonesia	161	283	(43)	751
Colombia	193	210	(8)	662
Thailand	136	161		618
Top 10 importers	**4,252**	**6,653**	(36)	**16,939**
Total US wheat export sales	**8,074**	**10,319**	**(22)**	**26,361**
% of Projected	32%	44%		
Change from prior week	388	591		
Top 10 importers' share of U.S. wheat export sales	53%	64%		64%
USDA forecast, July 2015	**25,170**	**23,270**	**8**	

(n) indicates negative number.

[1] Based on FAS Marketing Year Ranking Reports - 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/

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

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

Port regions	Week ending 08/06/15	Previous Week[1]	Current Week as % of Previous	2015 YTD[1]	2014 YTD[1]	2015 YTD as % of 2014 YTD	Last 4-weeks as % of 2014	Last 4-weeks as % of 3-yr. avg.	Total[1] 2014
Pacific Northwest									
Wheat	58	154	37	6,257	7,537	83	113	87	12,436
Corn	149	177	85	6,132	5,817	105	86	151	7,781
Soybeans	0	3	0	4,071	4,486	91	n/a	25	12,887
Total	**207**	**334**	**62**	**16,460**	**17,840**	**92**	**97**	**110**	**33,104**
Mississippi Gulf									
Wheat	155	47	331	2,690	2,900	93	98	77	4,495
Corn	491	581	84	18,532	19,916	93	110	172	30,912
Soybeans	131	110	119	11,562	10,432	111	209	110	29,087
Total	**777**	**738**	**105**	**32,784**	**33,248**	**99**	**117**	**136**	**64,495**
Texas Gulf									
Wheat	107	48	225	2,379	4,003	59	50	37	6,120
Corn	5	30	18	336	370	91	141	202	580
Soybeans	0	0	n/a	210	257	82	n/a	0	949
Total	**112**	**77**	**145**	**2,925**	**4,631**	**63**	**54**	**41**	**7,649**
Interior									
Wheat	40	36	113	861	747	115	41	123	1,400
Corn	131	89	146	3,648	3,342	109	96	142	5,677
Soybeans	24	62	39	1,936	2,206	88	105	107	4,312
Total	**195**	**188**	**104**	**6,445**	**6,295**	**102**	**129**	**129**	**11,389**
Great Lakes									
Wheat	24	48	50	406	278	146	912	335	935
Corn	10	0	n/a	291	94	311	431	957	288
Soybeans	0	0	n/a	86	51	170	n/a	0	988
Total	**34**	**48**	**71**	**783**	**422**	**185**	**620**	**402**	**2,211**
Atlantic									
Wheat	1	3	35	360	273	132	44	75	553
Corn	5	5	99	99	504	20	22	62	816
Soybeans	3	2	129	935	995	94	309	247	2,119
Total	**9**	**10**	**87**	**1,394**	**1,772**	**79**	**41**	**81**	**3,487**
U.S. total from ports[2]									
Wheat	385	335	115	12,953	15,738	82	96	76	25,939
Corn	791	881	90	29,038	30,043	97	105	165	46,054
Soybeans	158	178	89	18,800	18,427	102	203	101	50,342
Total	**1,334**	**1,395**	**96**	**60,791**	**64,209**	**95**	**108**	**119**	**122,335**

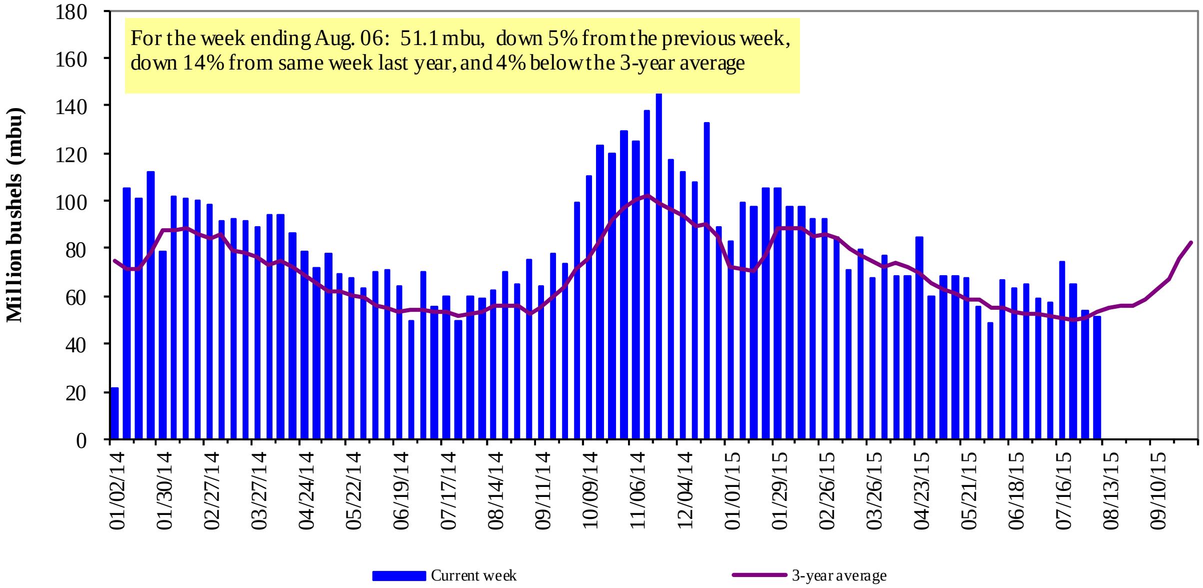
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2014.

Figure 14

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

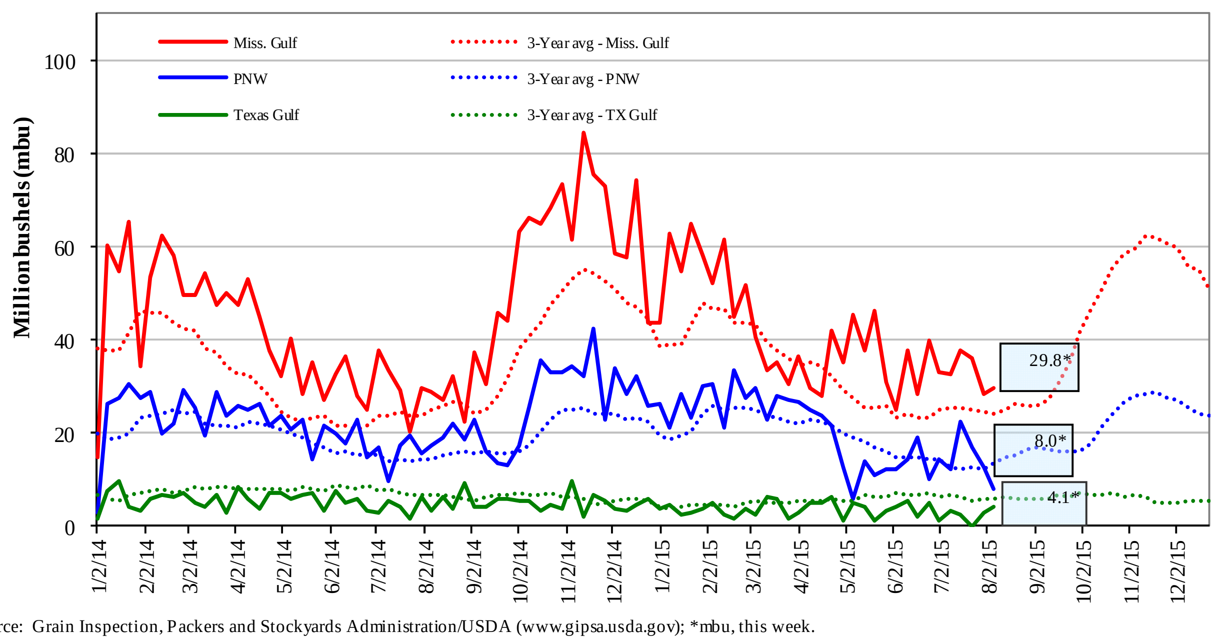


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); *mbu, this week.

August 6: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 4	up 42	up 8	down 37
Last year (same week)	up 3	up 26	up 5	down 54
3-yr avg. (4-wk mov. avg.	up 23	down 30	up 13	down 47

Ocean Transportation

Table 17

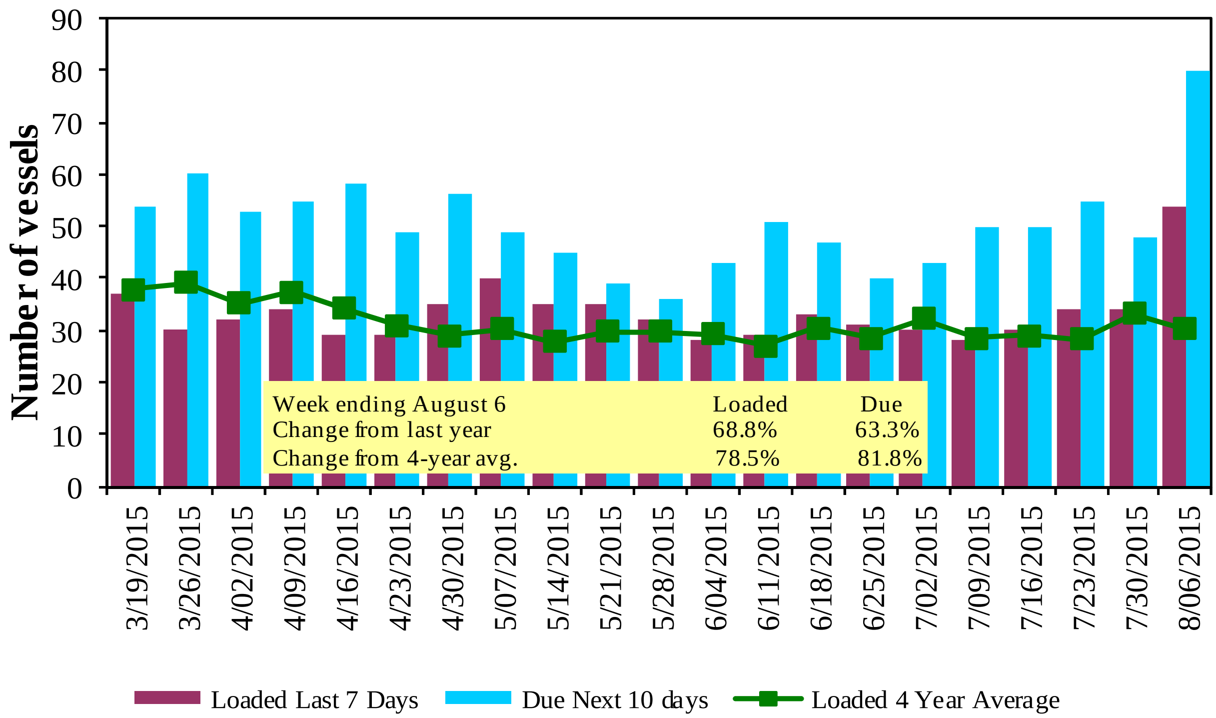
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
8/6/2015	36	54	80	7	n/a
7/30/2015	49	34	48	5	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	47	39	60	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

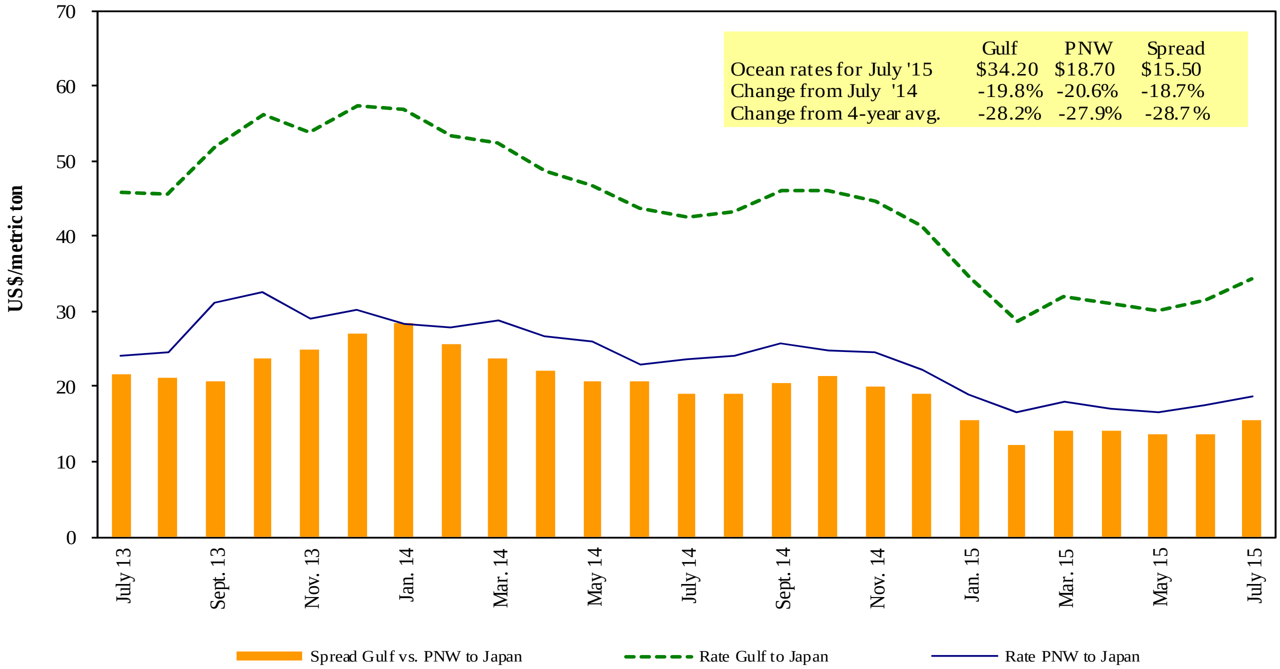
U.S. Gulf[1] Vessel Loading Activity



Source:Transportation & Marketing Programs/AMS/USDA
[1]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 08/08/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Jul 25/Aug 5	54,000	37.00
U.S. Gulf	China	Heavy Grain	Jul 10/15	53,000	31.75
U.S. Gulf	China	Grain	Jun 1/10	50,000	35.75
U.S. Gulf	Guatemala[1]	Corn	Jul 20/30	10,000	108.18
U.S. Gulf	Isreal	Grain	Aug 21/28	32,000	25.00
PNW	China	Heavy Grain	Jun 1/10	60,000	14.00
Brazil	China	Grain	Aug 10/30	60,000	25.25
Brazil	China	Heavy Grain	Aug 15/25	60,000	24.50
Brazil	China	Grain	Aug 1/30	60,000	23.25
Brazil	China	Heavy Grain	Jul 10/15	60,000	24.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.75
Brazil	China	Heavy Grain	Jun 25/30	60,000	26.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.50
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.75
Brazil	Egypt Med	Corn	Jul 5/15	50,000	19.50
Brazil	Thailand	Grain	Aug 1/5	60,000	28.50
River Plate	South Africa	Corn	Jul 1/10	25,000	24.25
River Plate	Vietnam	Corn	Jun 13/18	60,000	30.00
Russia	Egypt Med	Grain	Aug 5/12	60,000	8.00
Thailand	Senegal	Rice Bggd	Jun 11/16	23,000	34.00
Uruguay	Algeria	Corn	Aug 3/8	20,000	38.00
Uruguay	Syria	Soybean Meal	Jun 10/15	26,000	38.80

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

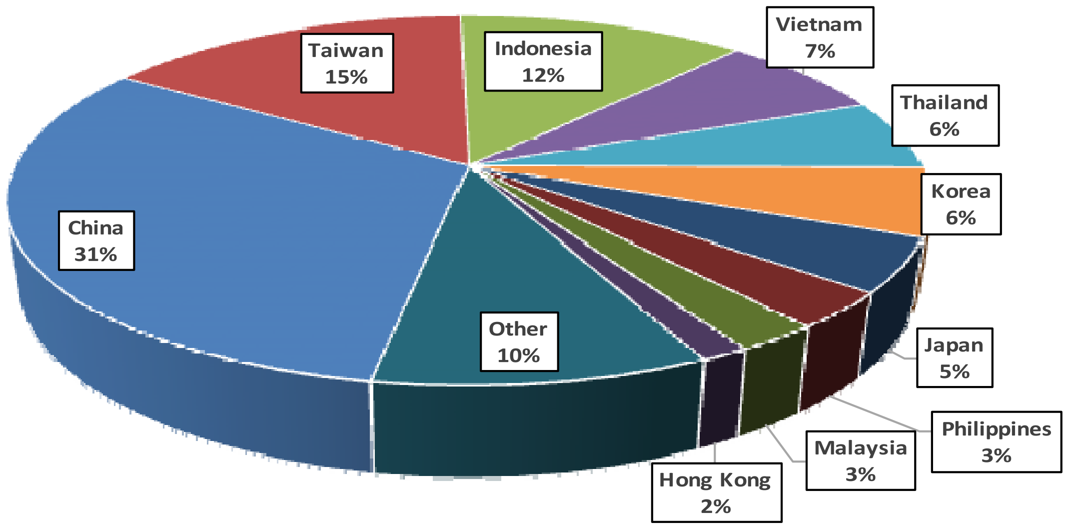
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2014

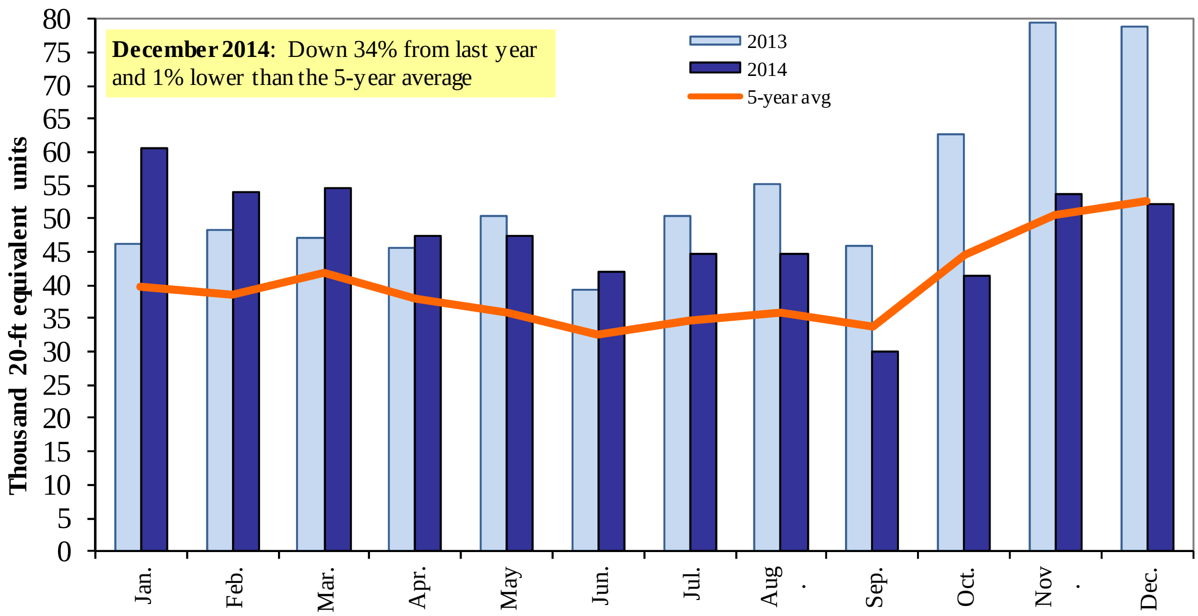


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

Contacts and Links

Coordinators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
Pierre Bahizi	pierre.bahizi@ams.usda.gov	(202) 690 - 0992
Weekly Highlight Editors		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
Rail Transportation		
Marvin Prater	marvin.prater@ams.usda.gov	(540) 361 - 1147
Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Jesse Gastelle	jesse.gastelle@ams.usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@ams.usda.gov	(202) 690 - 3244
Barge Transportation		
Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
Truck Transportation		
April Taylor	april.taylor@ams.usda.gov	(202) 295 - 7374
Grain Exports		
Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@ams.usda.gov	(202) 295 - 7374

Subscription Information: Send relevant information to **GTRContactUs@ams.usda.gov** for an electronic copy *(printed copies are also available upon request)*.

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