United States Department of Agriculture

Grain Transportation Report

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

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August 18, 2016

Contents

The next release is Aug 25, 2016

WEEKLY HIGHLIGHTS

Record Corn and Soybean Production Projections
As noted in its August edition of *Crop Production* released last week, USDA's National Agricultural Statistics Service (NASS) currently anticipates a record corn and soybean harvest in 2016, with 15.2 billion bushels (bbu) and 4.1 bbu, respectively. With sorghum added to the mix, NASS projects a record 19.7 bbu from these three crops this fall, 9 percent higher than the 3-year average. If realized, such volumes will lead to greater transportation demand. Iowa is predicted to see the most growth in its corn and soybean production, with an additional 401,000 bushels (compared to the 3-year average), followed by Minnesota (+217,000 bushels), Illinois (+185,000 bushels), Nebraska (+148,000 bushels), and Missouri (+138,000 bushels).

Total Grain Inspections Down but Wheat Shipments Increase
For the week ending August 11, **total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 2.59 million metric tons (mmt), down 12 percent from the previous week, up 38 percent from last year, and 85 percent above the 3-year average. Also, wheat inspections jumped 53 percent from the previous week as demand from Asia and Latin America increased. Soybean inspections dropped 27 percent from the previous week and corn inspections decreased 21 percent. Mississippi Gulf and Pacific Northwest (PNW) grain inspections each decreased 20 percent from week to week. Increased demand for wheat helped boost Texas Gulf inspections by 53 percent, compared to the past week. Outstanding export sales (unshipped) of grain were also up for wheat but down for corn and soybeans.

Short-Term Grain Transportation Demand Up
Strong demand for grain transportation from mid-July through early August is evident due to high inspections, barge movements, and rail carloads, along with strong vessel loading activities in the U.S. Gulf. During the last 4 weeks, total grain inspections from all major ports averaged 2.7 mmt, up 67 percent from the same period last year and 93 percent above the 3-year average. Weekly down-bound grain movements at Mississippi River Locks 27 (near St. Louis) for the past 4 weeks have averaged 958 thousand tons, 40 percent higher than the same period last year, and 106 percent higher than the 3-year average. In addition, during the past 4 weeks ending August 11, an average of 54 ocean-going grain vessels were loading or waiting to be loaded in the U.S. Gulf, 39 vessels were loaded in the previous 7 days, and 66 vessels were due in the next 10 days. In the prior 8 weeks ending July 14, an average of 32 vessels were either loading or waiting to load, 34 vessels loaded in the previous 7 days, and 55 vessels were due in the next 10 days.

Panama Canal Tentatively Scheduled Lock Maintenance, Reduces Transit Capacity
The West Lane of the Miraflores and the East Lane of Gatun Locks on the Panama Canal will be closed for maintenance and repair work for 4 days, August 23-26, 2016. Depending on vessel mix and other factors, the estimated transit capacity of the Canal due to the maintenance work is only 22–24 vessels per day, compared to the normal transit capacity of 35–37 vessels. However, Canal authorities do not anticipate any major delays at this time.

Snapshots by Sector

Export Sales
During the week ending August 4, **unshipped balances** of wheat, corn, and soybeans totaled 19.6 mmt, up 60 percent from the same time last year. Net weekly **wheat export sales** were .608 mmt, up 86 percent from the previous week. Net **corn export sales** were .595 mmt, up 80 percent from the previous week, and net **soybean export sales** were .308 mmt, down 30 percent the past week.

Rail
U.S. Class I railroads originated 24,120 **grain carloads** for the week ending August 6, down 2 percent from the previous week, up 12 percent from last year, and up 25 percent from the 3-year average.

Average August shuttle **secondary railcar bids/offers** per car were $1,125 above tariff for the week ending August 11, up $529 from last week, and $1,338 higher than last year. Average secondary non-shuttle secondary railcar bids/offers were $0, down $56 from last week, and $31 higher than last year.

Barge
For the week ending August 13, **barge grain movements** totaled 1,265, 662 tons, 13 percent higher than last week, and up 137 percent from the same period last year.

For the week ending August 13, 809 grain barges **moved down river**, up 13 percent from last week; 647 grain barges were **unloaded in New Orleans**, down 17 percent from the previous week.

Ocean
For the week ending August 11, 48 **ocean-going grain vessels** were loaded in the Gulf, 11 percent less than the same period last year. Seventy-nine vessels are expected to be loaded within the next 10 days, 1 percent less than the same period last year.

For the week ending August 11, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $28.25 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was $16.00 per metric ton, unchanged from the previous week.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 18, 2016.
Web: **http://dx.doi.org/10.9752/TS056.08-18-2016**

Feature Article/Calendar

Landed Costs for Corn and Soybean to Mexico Increased; Decreased for Wheat

Higher farm values for corn and soybeans pushed up total landed costs for both the land and water routes to Mexico during the second quarter of 2016 compared to the previous quarter (see table below). In addition to the higher farm values, the transportation costs for waterborne corn and soybeans (to Veracruz) also increased during the quarter. The transportation cost for Iowa corn hauled by land to Guadalajara decreased slightly, while the costs of transporting soybeans from Nebraska by land remained relatively unchanged, as did wheat from Kansas (see table below).

Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico

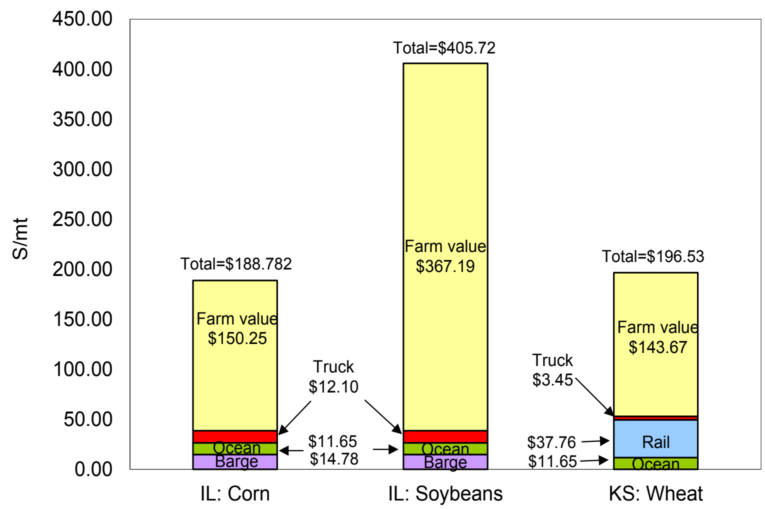
	Water route (to Veracruz) $/metric ton					Land route (to Guadalajara) $/metric ton				
	2015 2nd qtr.	2016 1st qtr.	2016 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2015 2nd qtr.	2016 1st qtr.	2016 2nd qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
Corn										
Origin			IL					IA		
Truck[1]	9.18	8.18	12.10	31.8	47.9	3.67	3.29	3.45	-6.0	4.9
Rail[2]						87.88	86.61	85.41	-2.8	-1.4
Ocean[3]	11.89	10.44	11.65	-2.0	11.6					
Barge	20.46	13.66	14.78	-27.8	8.2					
Total transportation cost[4]	41.53	32.28	38.53	-7.2	19.4	91.55	89.90	88.86	-2.9	-1.2
Farm Value[5]	144.09	144.78	150.25	4.3	3.8	143.04	137.79	142.64	-0.3	3.5
Landed Cost[6]	185.62	177.06	188.78	1.7	6.6	234.59	227.69	231.50	-1.3	1.7
Transport % of landed cost	22	18	20			39	39	38		
Soybeans										
Origin			IL					NE		
Truck	9.18	8.18	12.10	31.8	47.9	3.67	3.29	3.45	-6.0	4.9
Rail						93.01	94.26	93.93	1.0	-0.4
Ocean	11.89	10.44	11.65	-2.0	11.6					
Barge	20.46	13.66	14.78	-27.8	8.2					
Total transportation cost	41.53	32.28	38.53	-7.2	19.4	96.68	97.55	97.38	0.7	-0.2
Farm Value	359.60	324.94	367.19	2.1	13.0	343.06	306.20	347.60	1.3	13.5
Landed Cost	401.13	357.22	405.72	1.1	13.6	439.74	403.75	444.98	1.2	10.2
Transport % of landed cost	10	9	9			22	24	22		
Wheat										
Origin			KS					KS		
Truck	3.67	3.29	3.45	-6.0	4.9	3.67	3.29	3.45	-6.0	4.9
Rail	38.05	38.49	37.76	-0.8	-1.9	74.00	72.39	72.19	-2.4	-0.3
Ocean	11.89	10.44	11.65	-2.0	11.6					
Total transportation cost	53.61	52.22	52.86	-1.4	1.2	77.67	75.68	75.64	-2.6	-0.1
Farm Value	193.15	151.63	143.67	-25.6	-5.2	193.15	151.63	143.67	-25.6	-5.2
Landed Cost	246.76	203.85	196.53	-20.4	-3.6	270.82	227.31	219.31	-19.0	-3.5
Transport % of landed cost	22	26	27			29	33	34		

[1]Truck rates for the second quarter were revised from the previous estimates.
[2]Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table. Origins are modified from past tables. Rail rates for the water route were revised from previous estim
[3]Source: O'Neil Commodity Consulting
[4]Transportation costs for Kansas wheat transported via water route were revised from previous estimates
[5]Source: USDA/NASS
[6]Landed cost is total transportation cost plus farm value

The landed costs for waterborne route corn and soybeans from Illinois increased 7 and 14 percent, respectively, due to increases in farm values and transportation costs from the previous quarter (see table). Although the cost of shipping Kansas wheat by the water route increased slightly, the reduction in the farm value more than offset the increase in transportation costs. This pushed the landed cost down by 4 percent. The increase in the transportation costs for waterborne grain shipments was caused by increased truck, barge, and ocean freight rates during the quarter. Truck rate rates were pushed up partly by the rising diesel fuel prices during the quarter (see Figure 13 inside the *Grain Transportation Report* (*GTR*)). Ocean freight rates for shipping bulk commodities, including grains, increased during the quarter due to iron ore restocking in China, and increased grain trade especially out of South America (see 08/04/16 *GTR*). There was also a seasonal increase in the barge rates during the second quarter.

The landed costs for corn and soybeans transported by land increased by 2 and 10 percent, respectively, while the landed cost for wheat fell by 4 percent. As with the land route, the landed cost for the wheat fell mostly due to the reduction in the farm value. Year-to-year transportation costs fell for all grain, except for Nebraska soybeans shipped by the land route, which increased slightly by 1 percent. For the second quarter of 2016, the landed costs for the water route ranged from $189 to $406 per metric ton (mt) (see table and figure 1), and $219 to$445 per mt for the land route (see table and figure 2). The transportation share of the landed costs ranged 9 to 27 percent for the water route and 22 to 38 percent for the land route.

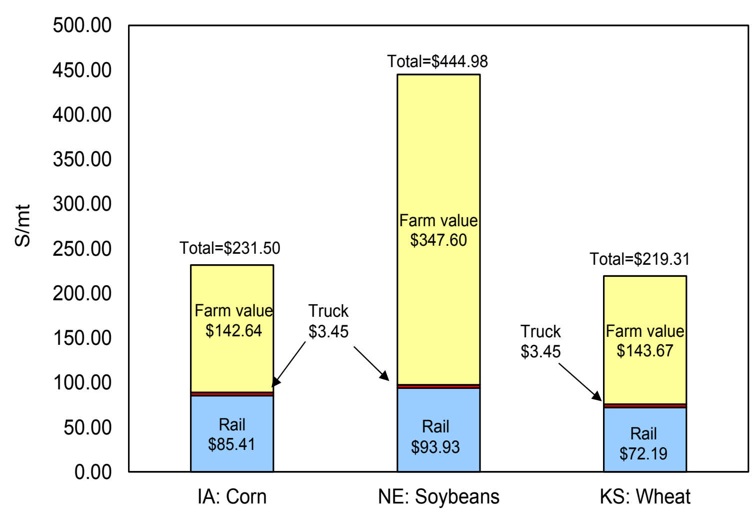
Figure 1. Water route shipment costs ($/mt) to Veracruz, Mexico



Source: USDA, Agricultural Marketing Service

Market Analysis and Outlook:
Despite the increase in the landed costs, Mexico imported more corn and soybeans from the United States during the second quarter, compared to the same period a year ago. During the quarter, Mexico imported 3.94 million metric ton (mmt) of corn from the U.S.—20 percent more than the same period a year ago (FAS, GATS Data). Mexico also imported 0.87 mmt of soybeans from the U.S., 3 percent more than the same period last year. The value of Mexico's imported corn from the U.S. was $7.54 million and $3.42 million for soybeans, a 19 and 2 percent increase, respectively, over the same period a year ago. Mexico imported 0.61 mmt of wheat from the U.S. during the quarter, which is 11 percent less than a year earlier (FAS, GATS Data). However, Mexico's wheat imports for marketing year 2016/17 is forecast at 4.3 mmt, mainly due to lower domestic production caused by insufficient water supply in some production regions (*USDA, FAS GAIN Report #:MX 6023*). Total Mexico corn imports for MY 2016/17 are projected at 12.5 mmt, which is revised slightly downward due to higher-than previously estimated domestic production caused by higher planted area and favorable weather conditions (*USDA, FAS GAIN Report #:MX 6023*). Total Mexico's soybean imports for MY 2016/17 are forecast at 4.0 mmt, driven in part by strong demand from domestic poultry and hog sectors (*USDA, FAS GAIN Report #:MX 6014*). As the majority of Mexico's corn and wheat imports tend to come from the United States, it is essential to keep the U.S. transportation and landed costs moderate in order to maintain a competitive edge. *surajudeen.olowolayemo@ams.usda.gov*

Figure 2. Land route shipment costs ($/mt) to Guadalajara, Mexico



Source: USDA, Agricultural Marketing Service

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators [1]

For the week ending	Truck	Rail: Unit Train	Rail: Shuttle	Barge	Ocean: Gulf	Ocean: Pacific
08/17/16	155	258	254	217	126	113
08/10/16	155	261	231	202	126	113

[1]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	8/12/2016	8/5/2016
Corn	IL--Gulf	-0.70	-0.74
Corn	NE--Gulf	-0.91	-0.98
Soybean	IA--Gulf	-1.48	-1.48
HRW	KS--Gulf	-1.87	-1.82
HRS	ND--Portland	-2.29	-2.06

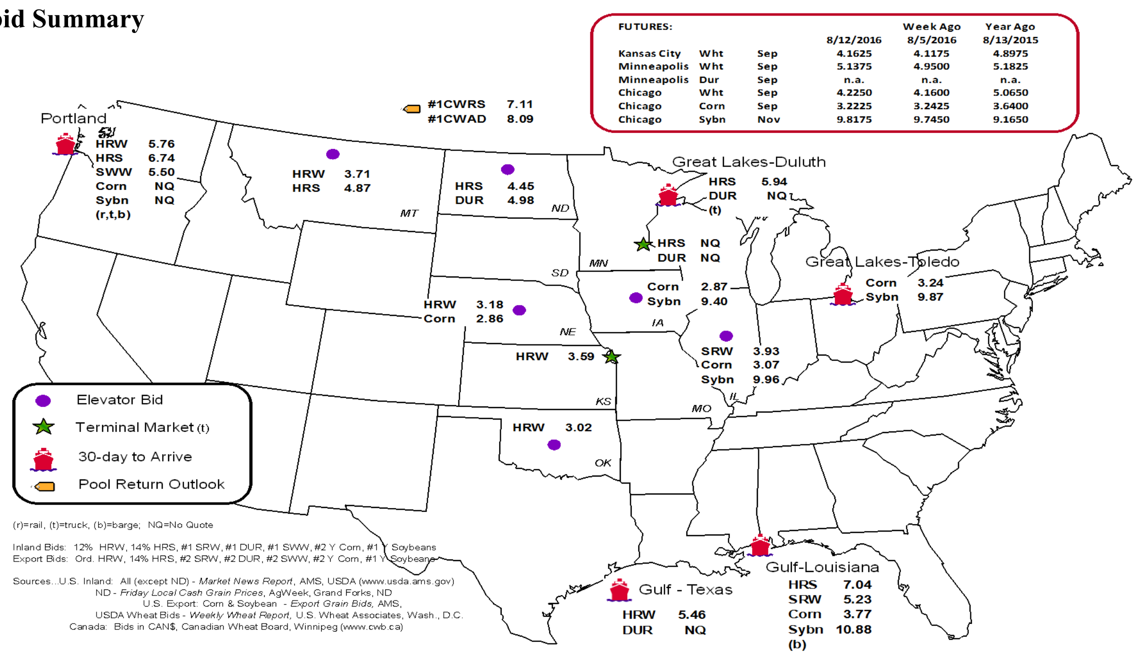
Note: nq = no quote

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]

For the Week Ending	Mississippi Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-Border Mexico[3]
8/10/2016[p]	1,089	1,170	6,320	308	8,887	8/6/2016	2,464
8/03/2016[r]	1,179	1,411	4,772	287	7,649	7/30/2016	2,046
2016 YTD[r]	10,130	45,075	157,430	11,105	223,740	2016 YTD	66,023
2015 YTD[r]	12,639	38,086	131,350	14,557	196,632	2015 YTD	56,972
2016 YTD as % of 2015 YTD	80	118	120	76	114	% change YTD	116
Last 4 weeks as % of 2015[2]	525	168	182	197	197	Last 4wks % 2015	119
Last 4 weeks as % of 4-year avg.[2]	437	99	183	166	172	Last 4wks % 4 yr	143
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

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2015 and prior 4-year average.

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

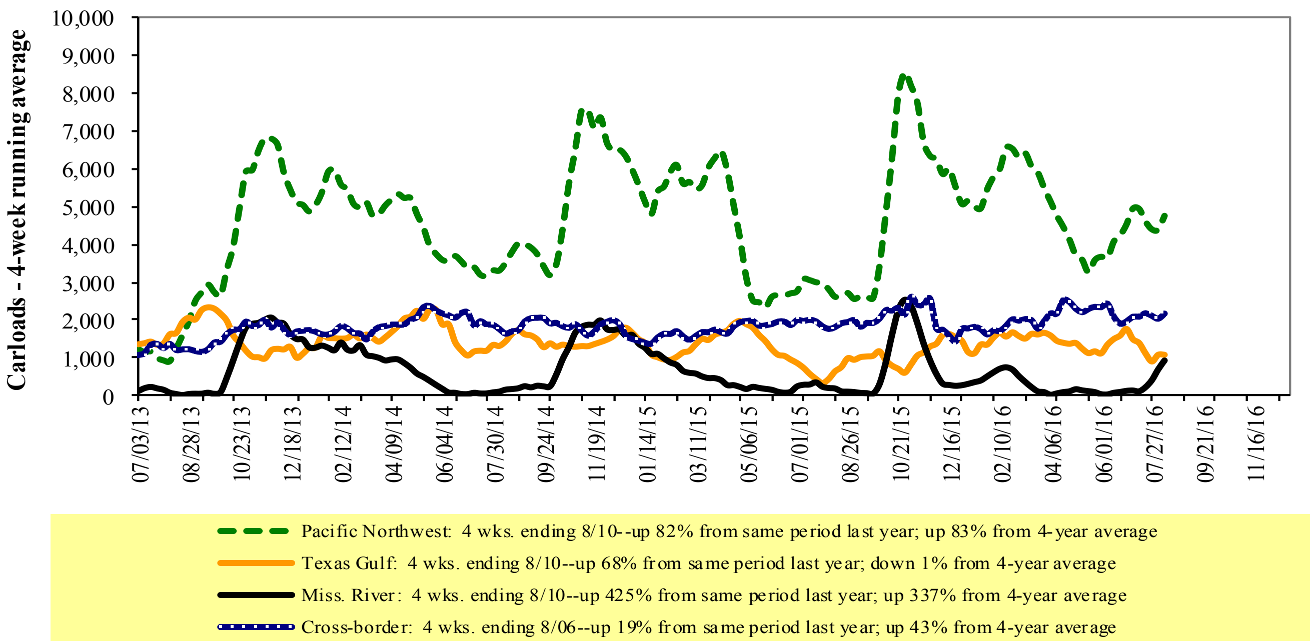
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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:	East		West			U.S. total	Canada	
8/6/2016	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,227	2,781	13,290	918	5,904	24,120	4,106	5,617
This week last year	2,032	2,898	10,993	841	4,823	21,587	3,432	5,469
2016 YTD	53,745	86,894	331,355	26,605	164,377	662,976	102,038	134,558
2015 YTD	63,800	92,508	305,987	26,884	159,263	648,442	126,581	137,939
2016 YTD as % of 2015 YTD	84	94	108	99	103	102	81	98
Last 4 weeks as % of 2015*	66	110	127	109	114	115	103	100
Last 4 weeks as % of 3-yr avg.**	81	112	144	139	120	127	108	92
Total 2015	104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

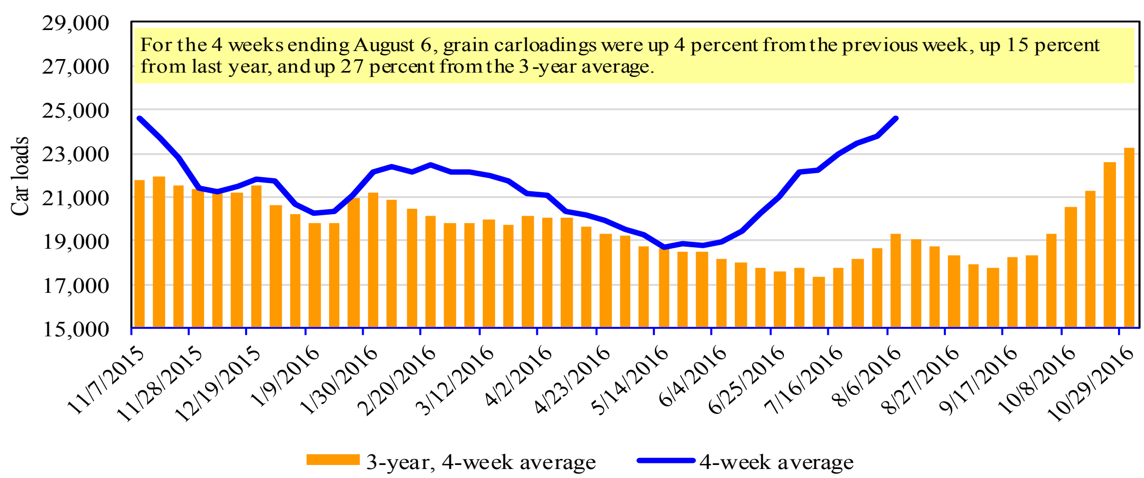
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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[1] ($/car)[2]

For the week ending: 8/11/2016		Aug-16	Aug-15	Sep-16	Sep-15	Oct-16	Oct-15	Nov-16	Nov-15
		Delivery period							
BNSF[3]	COT grain units	no offer	no bids	40	11	116	11	17	no bids
	COT grain single-car[5]	no offer	0 . . 25	153 . . 252	0 . . 10	193 . . 205	0 . . 31	127 . . 152	10 . . 11
UP[4]	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	no bids	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.

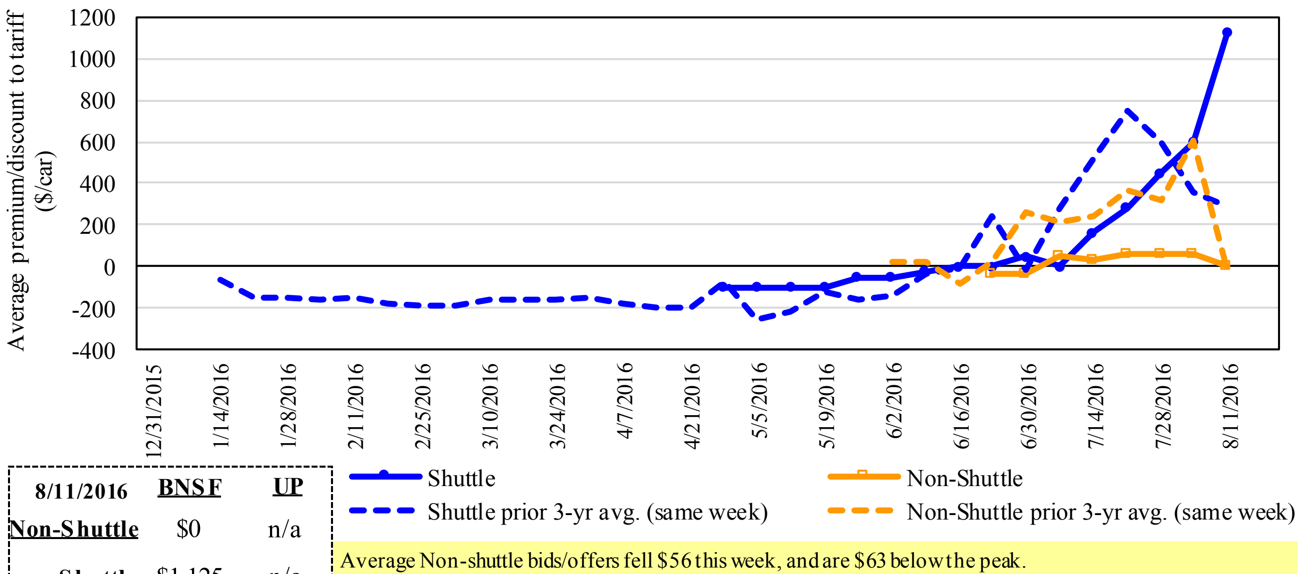
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 2016, Secondary Market

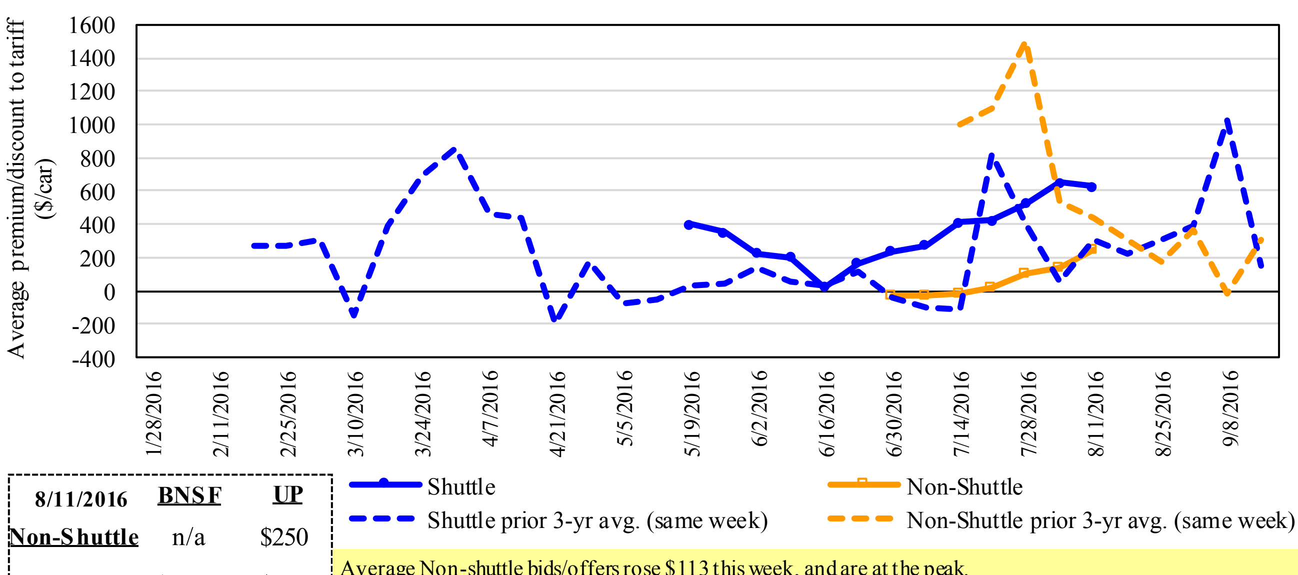


8/11/2016	BNSF	UP
Non-Shuttle	$0	n/a
Shuttle	$1,125	n/a

Average Non-shuttle bids/offers fell $56 this week, and are $63 below the peak.
Average Shuttle bids/offers rose $529 this week and are at the peak.

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

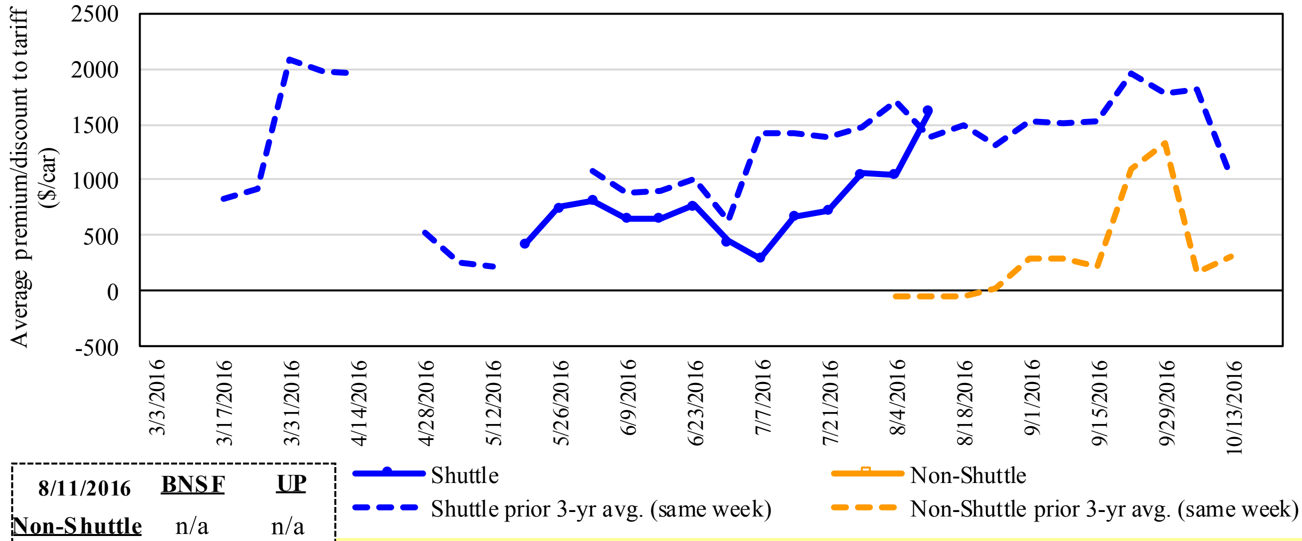


8/11/2016	BNSF	UP
Non-Shuttle	n/a	$250
Shuttle	$1,000	$250

Average Non-shuttle bids/offers rose $113 this week, and are at the peak.
Average Shuttle bids/offers fell $25 this week and are $25 below the peak.

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



8/11/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$1,850	$1,400

There were no Non-Shuttle bids/offers this week.
Average Shuttle bids/offers rose $575 this week and are at 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)[1]

	For the week ending:	Delivery period					
	8/11/2016	Aug-16	Sep-16	Oct-16	Nov-16	Dec-16	Jan-17
Non-shuttle	**BNSF-GF**	**0**	**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	(38)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**250**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	112	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	300	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**1125**	**1000**	**1850**	**n/a**	**n/a**	**n/a**
	Change from last week	283	50	250	n/a	n/a	n/a
	Change from same week 2015	1350	1163	1350	n/a	n/a	n/a
	UP-Pool	**n/a**	**250**	**1400**	**475**	**175**	**n/a**
	Change from last week	n/a	(100)	900	(25)	(75)	n/a
	Change from same week 2015	n/a	475	n/a	n/a	n/a	n/a

[1]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[1]

Effective date: 8/1/2016	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	$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
	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
Soybeans	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
Shuttle Train							
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	-7
	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

[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: 8/1/2016				Fuel			Percent
	Origin		Tariff	surcharge	Tariff plus surcharge per:		change[4]
Commodity	state	Destination region	rate/car[1]	per car[2]	metric ton[3]	bushel[3]	Y/Y
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	Queretaro, QA	$7,879	$99	$81.52	$2.07	1
	SD	Salinas Victoria, NL	$6,545	$0	$66.87	$1.70	6
	MO	Tlalnepantla, 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	Queretaro, 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

[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

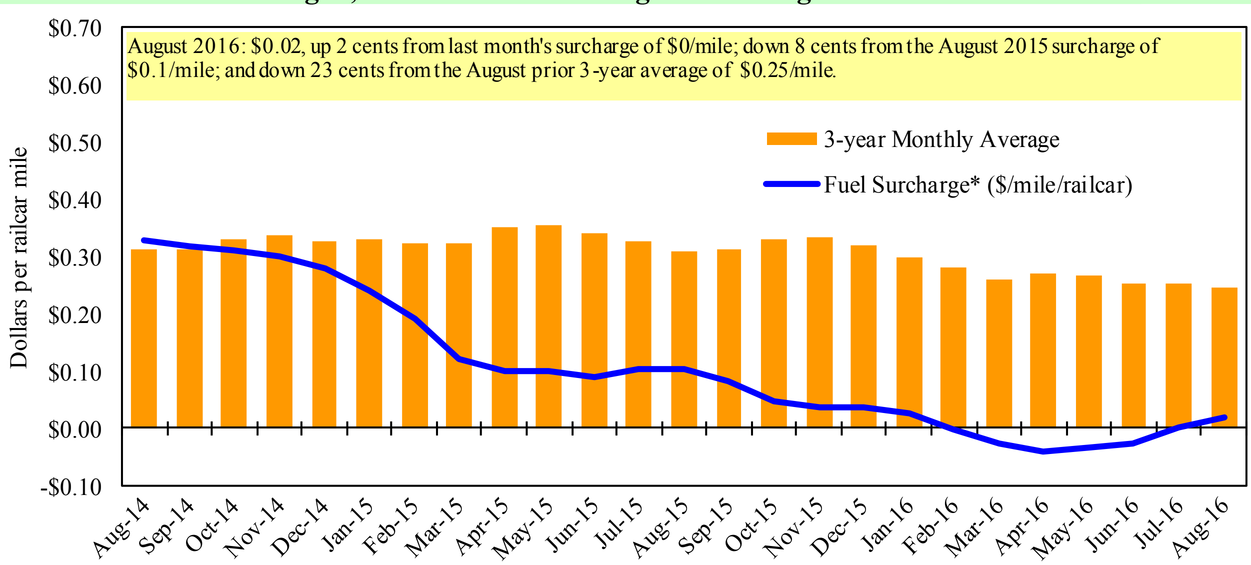
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Figure 7

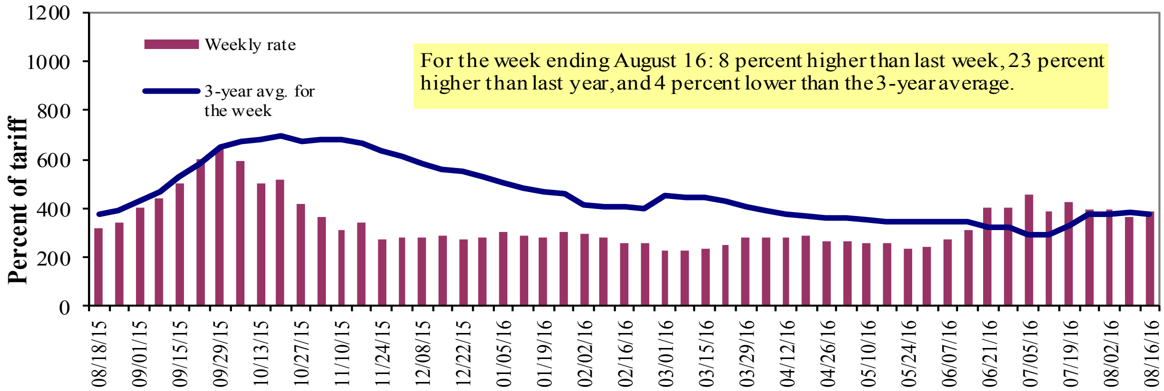
Railroad Fuel Surcharges, North American Weighted Average[1]



[1] Weighted by each Class I railroad's proportion of grain traffic for the prior year.
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.
**CSX strike price changed from $2.00/gal. to $3.75/gal. starting January 1, 2015.
Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8
Illinois River Barge Freight Rate[1,2]



[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]	8/16/2016	480	400	390	263	320	320	250
	8/9/2016	475	393	363	275	300	300	248
$/ton	8/16/2016	29.71	21.28	18.10	10.49	15.01	12.93	7.85
	8/9/2016	29.40	20.91	16.84	10.97	14.07	12.12	7.79
Current week % change from the same week:								
	Last year	26	21	23	2	9	9	-8
	3-year avg. [2]	7	2	4	-14	-8	-8	-13
Rate[1]	September	590	568	543	468	558	558	443
	November	625	550	518	438	450	450	388

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds;
Source: Transportation & Marketing Programs/AMS/USDA

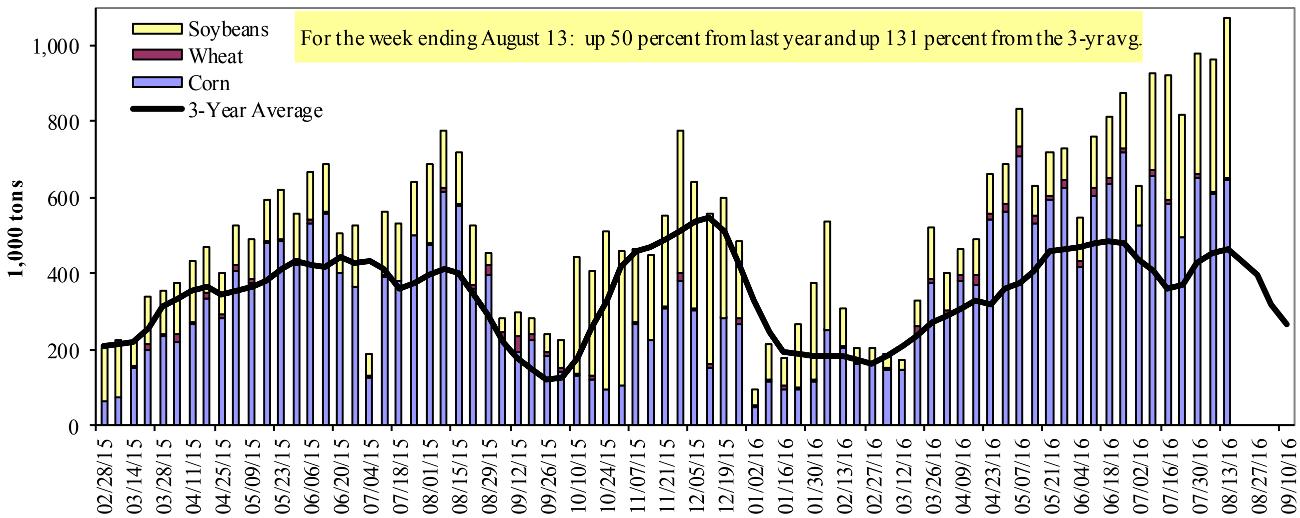
Figure 9
Benchmark tariff rates

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[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)

For the week ending 8/13/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	244	9	240	2	495
Winfield, MO (L25)	444	6	363	2	814
Alton, IL (L26)	637	6	407	2	1,051
Granite City, IL (L27)	644	6	424	2	1,076
Illinois River (L8)	180	0	71	0	251
Ohio River (L52)	82	13	41	0	135
Arkansas River (L1)	0	53	1	0	54
Weekly total - 2016	726	71	467	2	1,266
Weekly total - 2015	306	63	152	13	533
2016 YTD[1]	16,145	1,439	7,356	181	25,121
2015 YTD	13,657	1,126	6,450	155	21,388
2016 as % of 2015 YTD	118	128	114	116	117
Last 4 weeks as % of 2015[2]	124	106	212	57	143
Total 2015	19,215	1,686	14,191	359	35,451

[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.

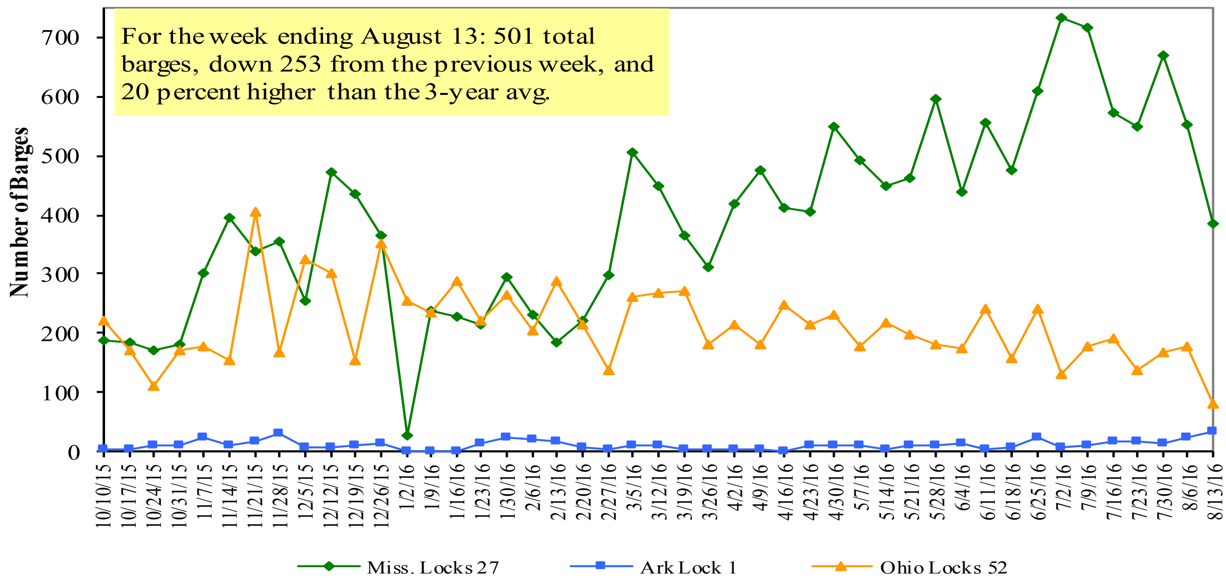
[2] As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

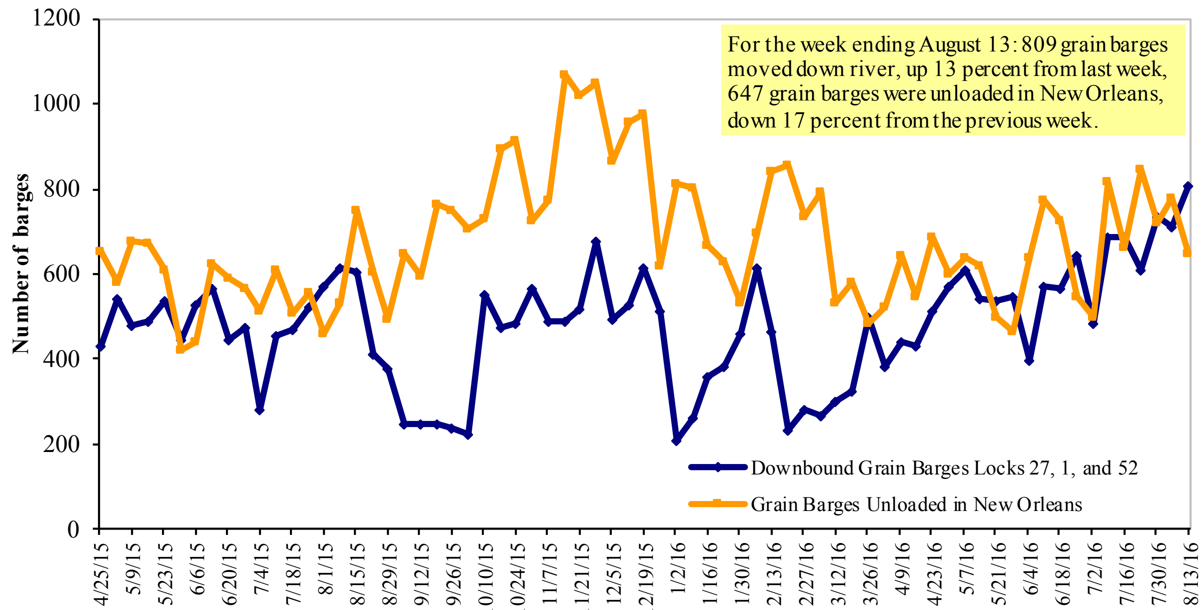
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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[1], Week Ending 8/15/2016 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.314	-0.007	-0.382
	New England	2.368	-0.010	-0.435
	Central Atlantic	2.406	-0.006	-0.410
	Lower Atlantic	2.233	-0.008	-0.350
II	Midwest[2]	2.273	-0.002	-0.266
III	Gulf Coast[3]	2.179	-0.005	-0.299
IV	Rocky Mountain	2.394	-0.002	-0.233
V	West Coast	2.583	-0.012	-0.248
	West Coast less California	2.441	-0.013	-0.249
	California	2.696	-0.011	-0.249
Total	U.S.	2.310	-0.006	-0.305

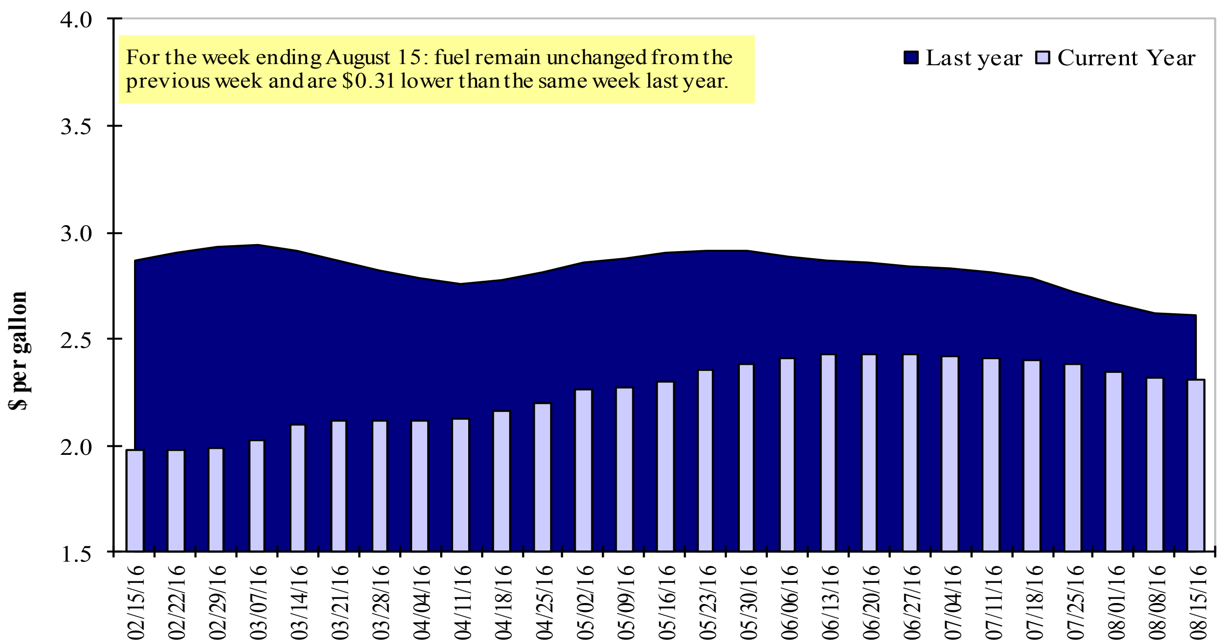
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
8/4/2016	2,516	625	1,942	1,098	165	6,345	7,743	5,481	19,569
This week year ago	1,348	888	1,968	1,143	252	5,599	4,767	1,878	12,245
Cumulative exports-marketing year[2]									
2015/16 YTD	1,777	405	1,395	741	34	4,352	41,887	47,256	93,495
2014/15 YTD	1,099	795	858	427	168	3,346	42,389	48,834	94,568
YTD 2015/16 as % of 2014/15	162	51	162	174	20	130	99	97	99
Last 4 wks as % of same period 2014/15	177	69	104	101	51	113	189	336	177
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

[1] Current unshipped (outstanding) export sales to date

[2] 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)

Table 13

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

For the week ending 8/04/2016	Total Commitments[2]			% change current MY from last MY	Exports[3] 3-year avg 2012-2014
	2016/17 Next MY	2015/16 Current MY	2014/15 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	1,518	10,594	11,920	(11)	9,244
Mexico	2,696	12,776	10,811	18	7,448
Korea	139	3,188	3,919	(19)	2,630
Colombia	189	4,663	4,424	5	1,727
Taiwan	202	2,302	1,802	28	1,224
Top 5 Importers	**4,743**	**33,523**	**32,875**	**2**	**22,273**
Total US corn export sales	**9,069**	**49,630**	**47,156**	**5**	**34,445**
% of Projected	16%	101%	99%		
Change from prior week	**1,016**	**595**	**29**		
Top 5 importers' share of U.S. corn export sales	52%	68%	70%		65%
USDA forecast, August 2016	**55,344**	**48,982**	**47,506**	**3**	
Corn Use for Ethanol USDA forecast, August 2016	**133,985**	**132,080**	**134,976**	**(2)**	

(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/. Total commitments change from prior week could include revisions from previous week's outastanding sales or
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

For the week ending 8/04/2016	Total Commitments[2] 2016/17 Next MY	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 -
China	5,824	29,086	29,784	(2)	24,211
Mexico	931	3,314	3,398	(2)	2,971
Indonesia	43	1,972	1,885	5	1,895
Japan	284	2,247	2,254	(0)	1,750
Taiwan	266	1,328	1,373	(3)	1,055
Top 5 importers	**7,347**	**37,945**	**38,695**	**(2)**	**31,882**
Total US soybean export sales	**13,746**	**52,737**	**50,712**	**4**	**39,169**
% of Projected	26%	103%	101%		
Change from prior week	**2,792**	**308**	**96**		
Top 5 importers' share of U.S. soybean export sales	53%	72%	76%		**81%**
USDA forecast, August 2016	**53,134**	**51,226**	**50,191**	**2**	

(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/ .Total commitments change from prior week could include reivisions from previous week's outstanding sales and/or accumulated sales

[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

For the week ending 8/04/2016	Total Commitments[2] 2016/17 Current MY	2015/16 Last MY	% change current MY from last MY	Exports[3] 3-yr avg 2013-2015
	- 1,000 mt -			- 1,000 mt -
Japan	716	743	(4)	2,743
Mexico	983	914	8	2,660
Nigeria	563	739	(24)	1,978
Philippines	903	723	25	2,156
Brazil	328	235	40	2,273
Korea	589	429	37	1,156
Taiwan	264	398	(34)	923
Indonesia	259	146	77	790
Colombia	317	193	64	664
Thailand	250	142	77	685
Top 10 importers	**4,922**	**4,520**	9	**16,028**
Total US wheat export sales	**10,697**	**8,945**	**20**	**24,059**
% of Projected	41%	42%		
Change from prior week	**608**	**422**		
Top 10 importers' share of U.S. wheat export sales	46%	51%		67%
USDA forecast, August 2016	**25,886**	**21,117**	**23**	

(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/. Total commitments change from prior week could include revisions from the previous week's outstanding and/or accumulated sales

[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	For the Week Ending 08/11/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of: Last Year	Prior 3-yr. avg.	2015 Total*
Pacific Northwest									
Wheat	221	192	115	7,641	6,658	115	143	151	10,985
Corn	313	497	63	7,418	6,225	119	209	233	7,232
Soybeans	74	67	110	4,813	4,071	118	3323	9943	11,809
Total	**608**	**757**	**80**	**19,873**	**16,955**	**117**	**196**	**213**	**30,027**
Mississippi Gulf									
Wheat	81	43	189	2,295	2,779	83	65	47	4,504
Corn	570	741	77	19,879	19,156	104	119	156	26,701
Soybeans	617	811	76	12,991	11,890	109	366	692	29,593
Total	**1,268**	**1,595**	**80**	**35,165**	**33,825**	**104**	**159**	**198**	**60,797**
Texas Gulf									
Wheat	313	137	228	2,843	2,444	116	334	146	3,724
Corn	32	88	36	750	368	204	283	491	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
Total	**345**	**226**	**153**	**3,685**	**3,022**	**122**	**322**	**170**	**5,184**
Interior									
Wheat	5	31	16	777	874	89	65	69	1,388
Corn	131	98	135	4,315	3,774	114	105	134	6,201
Soybeans	80	97	83	2,520	2,018	125	205	309	3,518
Total	**217**	**226**	**96**	**7,611**	**6,666**	**114**	**121**	**155**	**11,106**
Great Lakes									
Wheat	35	22	159	452	523	86	50	99	997
Corn	73	30	243	292	352	83	102	256	485
Soybeans	0	55	0	148	89	167	n/a	n/a	733
Total	**108**	**107**	**101**	**892**	**964**	**93**	**94**	**197**	**2,216**
Atlantic									
Wheat	3	3	122	197	419	47	162	22	520
Corn	27	0	n/a	41	99	41	296	80	277
Soybeans	12	38	31	991	976	102	262	685	2,053
Total	**42**	**41**	**103**	**1,229**	**1,494**	**82**	**252**	**102**	**2,850**
U.S. total from ports**									
Wheat	658	429	153	14,204	13,697	104	129	109	22,118
Corn	1,146	1,454	79	32,695	29,974	109	136	174	41,492
Soybeans	783	1,068	73	21,556	19,255	112	381	692	48,570
Total	**2,587**	**2,951**	**88**	**68,455**	**62,926**	**109**	**167**	**193**	**112,180**

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

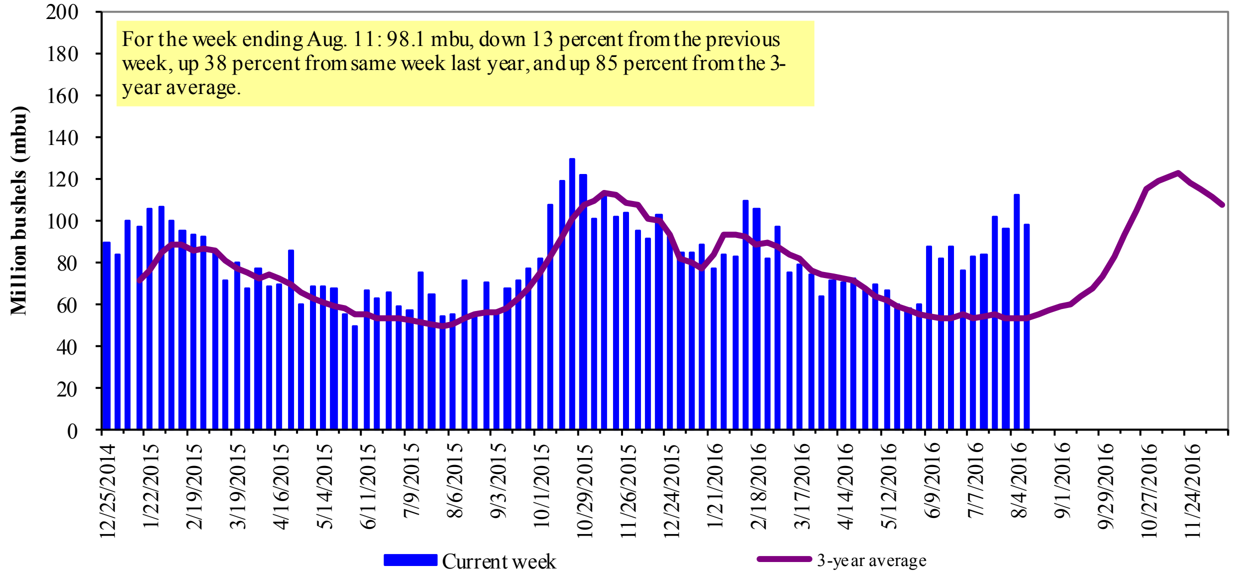
**Total only includes regions shown above

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

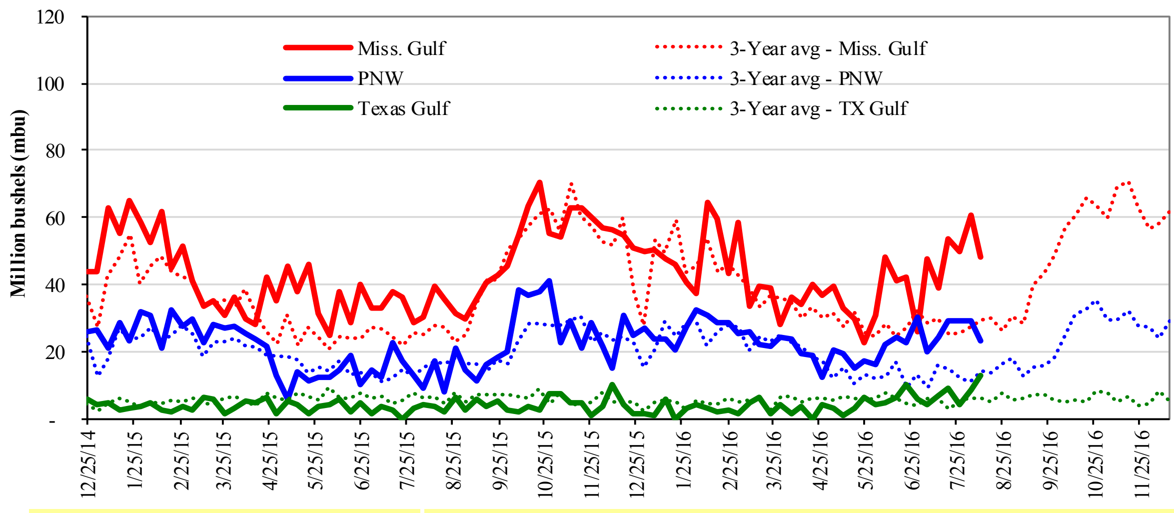
U.S. grain inspected for export (wheat, corn, and soybeans)



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[1] (wheat, corn, and soybeans)



Week ending 08/11/16 inspections (mbu):		Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	48.1	Last Week:	down 21	up 50	down 12	down 20
PNW:	23.2	Last Year (same week):	up 23	up 272	up 43	up 34
Texas Gulf:	12.8	3-yr avg. (4-wk. mov. Avg):	up 78	up 154	up 90	up 80

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

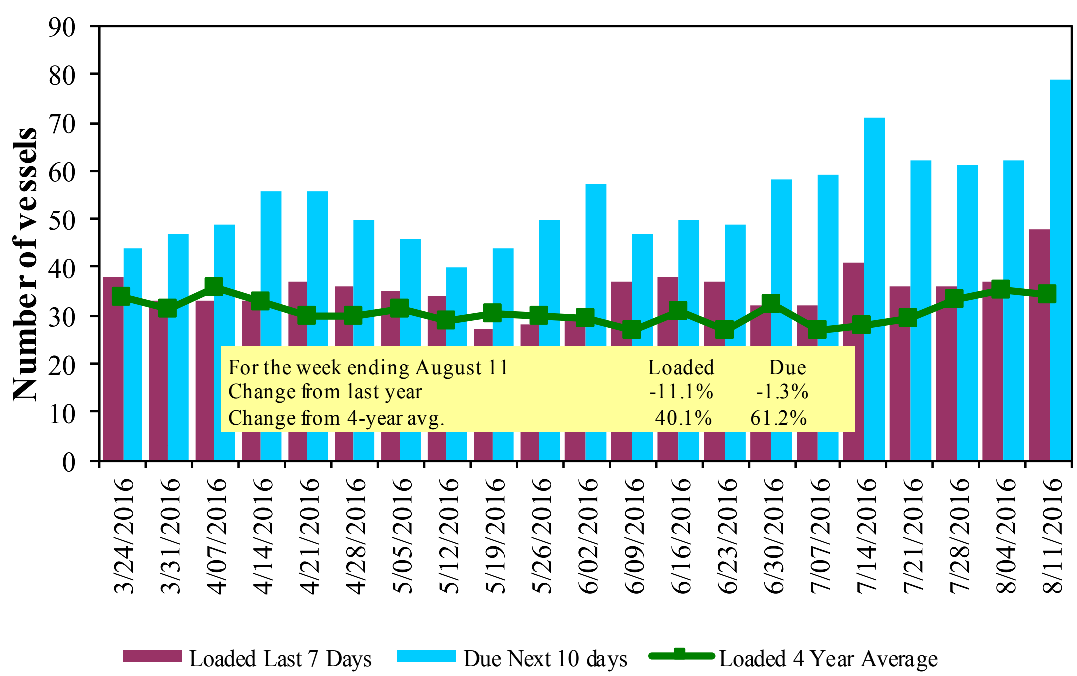
Ocean Transportation

Table 17
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
8/11/2016	49	48	79	17	n/a
8/4/2016	57	37	62	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

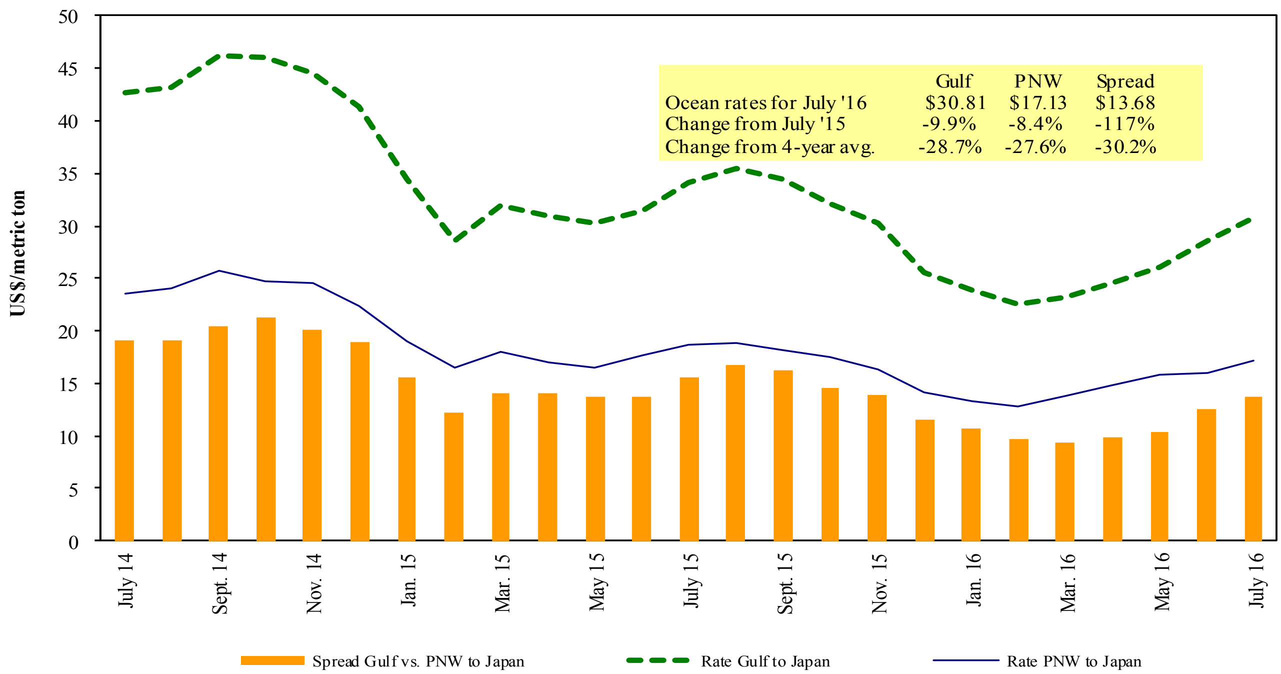
Figure 16
U.S. Gulf[1] Vessel Loading Activity



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 08/13/2016

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Aug 25/Sep 5	66,000	26.25
U.S. Gulf	China	Heavy Grain	Aug 24/30	60,000	26.40
U.S. Gulf	China	Heavy Grain	Aug 16/26	60,000	26.00
U.S. Gulf	China	Heavy Grain	Aug 15/25	60,000	26.75
U.S. Gulf	China	Heavy Grain	Aug 10/20	60,000	26.25
U.S. Gulf	South Africa	Sorghum[1]	Sep 15/25	20,000	63.50
U.S. Gulf	Djibouti	Wheat[1]	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	15.00
PNW	Taiwan	Wheat1	Sep 8/22	54,000	21.10
Brazil	China	Heavy Grain	Aug 18/25	60,000	18.60
Brazil	Japan	Heavy Grain	Sep 1/30	62,000	19.00
Brazil	Malaysia	Heavy Grain	Sep 1/30	65,000	17.00
Romania	France	Heavy Grain	Aug 5/9	55,000	8.50

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

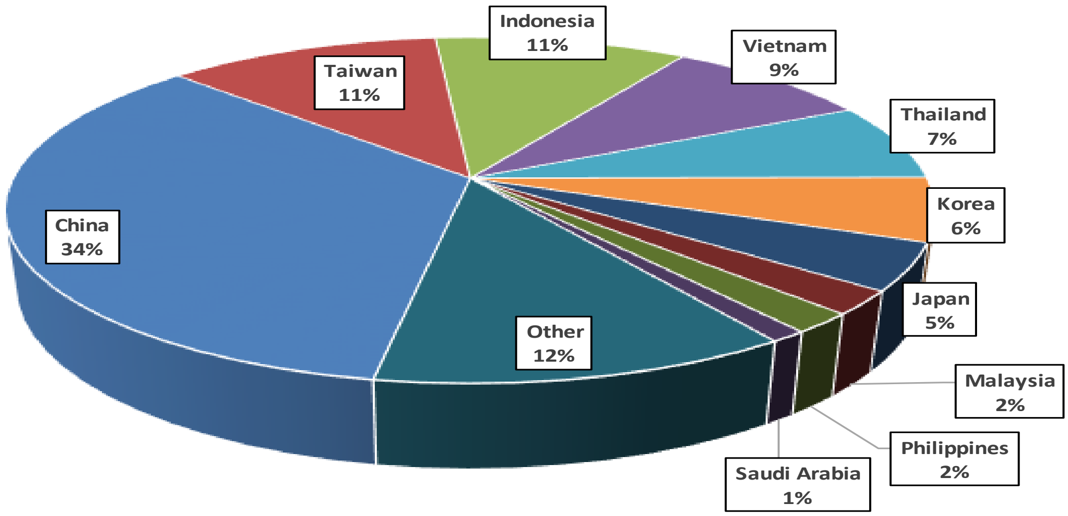
[1]50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 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

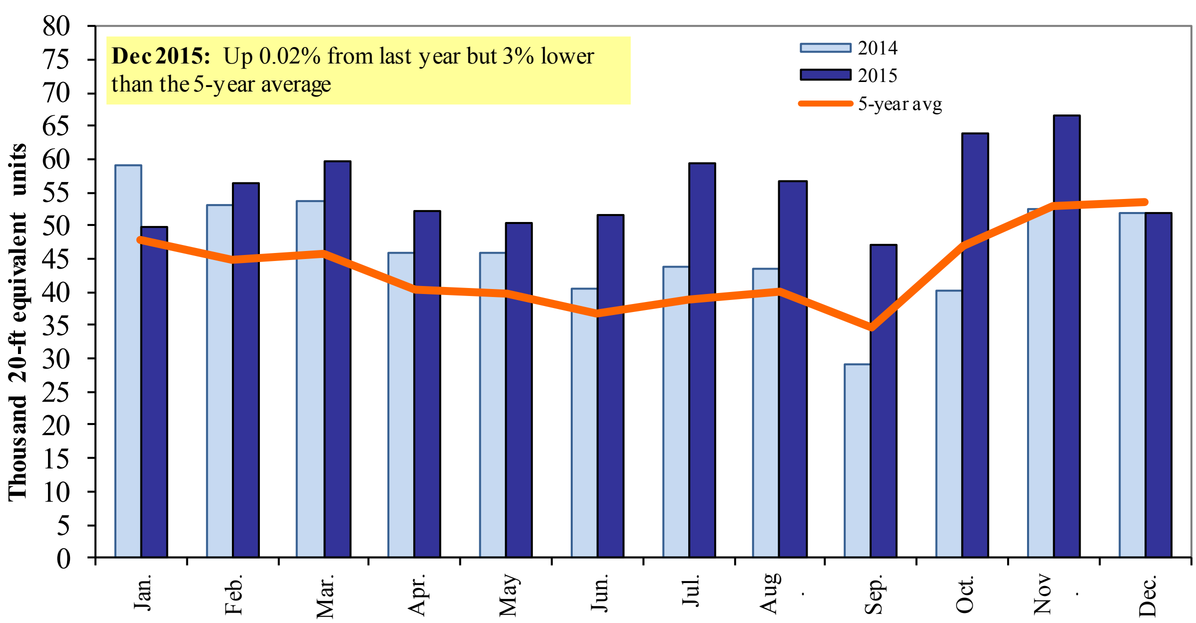


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

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) 720 - 7880
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

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) 720 - 7880
Matt Chang	matt.chang@ams.usda.gov	(202) 720 - 0299

Truck Transportation

April Taylor	april.taylor@ams.usda.gov	(202) 720 - 7880

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) 720 - 7880

Contributing Analysts

Sergio Sotelo	sergioa.sotelo@ams.usda.gov	(202) 756 - 2577

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

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* August 18, 2016. Web: **http://dx.doi.org/10.9752/TS056.08-18-2016**