USDA United States Department of Agriculture

Grain Transportation Report

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WEEKLY HIGHLIGHTS

New FMCSA Driver Coercion Rule

On November 27, the U.S. Department of Transportation's Federal Motor Carrier Safety Administration (FMCSA) announced the publication of a Final Rule on truck driver coercion. The regulations prohibit motor carriers, shippers, receivers, or transportation intermediaries from coercing drivers to operate commercial motor vehicles in violation of certain provisions of the Federal Motor Carrier Safety Regulations—including drivers' hours-of-service limits; the commercial driver's license regulations; drug and alcohol testing rules; and the Hazardous Materials Regulations. In the Federal Register comments, FMCSA says it "will take aggressive action when a violation of the prohibition against coercion can be substantiated. This action will include civil penalties [up to $16,000 in fines] consistent with the regulations, and may include initiation of a proceeding to revoke the operating authority of a for-hire motor carrier." Trucking is an essential component of grain transportation, making up 64 percent of all grain tonnages shipped in 2013 (see Grain Transportation Report dated 6/25/2015). The rule goes into effect on January 29, 2016.

CP Makes Offer to Purchase NS

On November 17, Norfolk Southern Railway (NS) confirmed it received a purchase offer of $28 billion from the Canadian Pacific Railway (CP). NS announced, "it has received an unsolicited, low-premium, non-binding, highly conditional indication of interest from Canadian Pacific." The release went on to say the Company and Board of Directors will "carefully evaluate and consider this indication of interest in the context of Norfolk Southern's strategic plans." Such a merger would reduce the number of class I railroads operating in the U.S. from seven to six. Approval from both U.S. and Canadian regulators would also be required.

Initiatives to Improve Coastal Ports

The Port of Wilmington in North Carolina will use $35 million in State funds to expand container facilities and dredge the harbor. Container volumes in the Port of Wilmington were up this year and the effort will help the port handle the larger ships passing through an expanded Panama Canal. Also along the Atlantic coast, Virginia ports already have a 50-foot draft that can accommodate larger ships. The Port of Savannah in Georgia will deepen its channel to 47 feet by 2018, and the Port of Charleston will have a 52-foot draft by 2019. On the West Coast, the Port of Oakland will increase the height of four ship-to-shore cranes to 141 feet above the dock (three rows of containers higher). The project will kick-off in April with an estimated cost of $14 million. After its completion, Oakland will have 12 super-post-Panamax cranes in operation.

Total Grain Inspections Continue to Fall

For the week ending November 26, **total inspections of grain** (corn, wheat, soybeans) for export reached 2.51 million metric tons (mmt), down 8 percent from the past week, 36 percent below last year, and 13 percent below the 3-year average. Total inspections of corn dropped 31 percent from the past week while soybean inspections decreased 4 percent from the same period. Wheat inspections increased 1percent from the previous week. Pacific Northwest grain inspections increased 10 percent from the past week due primarily to more soybean shipments, but Mississippi Gulf inspections decreased 6 percent. Current outstanding export sales are down for wheat and soybeans but are up for corn.

Snapshots by Sector

Export Sales

During the week ending November 19, **unshipped balances** of wheat, corn, and soybeans totaled 29.3 mmt, down 23 percent from the same time last year. Net weekly **wheat export sales** of .304 mmt were down 58 percent from the previous week. Net **corn export sales** were 2.04 mmt, were up 162 percent from the previous week, and net **soybean export sales** of 1.17 mmt were down 33 percent from the past week.

Rail

U.S. Class I railroads originated 21,619 **carloads of grain** for the week ending November 21, down 1 percent from the previous week, down 5 percent from last year, and up 1 percent from the 3-year average.

Average December shuttle **secondary railcar bids/offers** per car were $250 below tariff for the week ending November 26, up $100 from last week, and $188 lower than last year. Non-shuttle secondary railcar bids/offers were $94 below tariff, up $50 from last week, and $319 lower than last year.

Barge

For the week ending November 28, **barge grain movements** totaled 1,099,795 tons, up 33 percent from last week, and down 19 percent from the same period last year.

For the week ending November 28, 678 grain barges **moved down river**, up 31 percent from last week; 1,051 grain barges were **unloaded in New Orleans**, up 3 percent from the previous week.

Ocean

For the week ending November 26, 42 **ocean-going grain vessels** were loaded in the Gulf, 11 percent less than the same period last year. Sixty-nine vessels are expected to be loaded within the next 10 days, 10 percent more than the same period last year.

Fuel

During the week ending November 30, U.S. average **diesel fuel prices** decreased 2 cents from the previous week to $2.42 per gallon—down $1.18 from the same week last year.

Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report.* December 3, 2015.
Web: http://dx.doi.org/10.9752/TS056.12-03-2015

Feature Article/Calendar

Corn and Soybean Transportation Costs Increase in the Gulf and Pacific Northwest

This article provides information on the costs for transporting corn and soybean to the Gulf and Pacific Northwest (PNW) during the third quarter of 2015.

U.S. Gulf Costs: During the third quarter 2015, transportation costs for shipping corn and soybeans from Minneapolis, MN, through the U.S. Gulf to Japan continued to increase from the second quarter as barge and ocean rates increased (*see Table 1*). The cost for transporting corn and soybeans to the Gulf increased 6 percent quarter to quarter, but dropped 21 percent from last year as each mode experienced a decrease in rates. Truck rates decreased 7 percent quarter to quarter and 27 percent year to year as trucking activity and diesel prices decreased. Ocean rates increased 13 percent from the second quarter in the Gulf, but rates were down 21 percent from last year as vessel deliveries remained high (***Grain Transportation Report (GTR) 10/29/15***). Barge rates for shipping grain to the Gulf increased 3 percent quarter to quarter, but decreased 18 percent year to year as demand for barge services became slower due in part to the strong U.S. dollar.

Third quarter total landed costs (farm value plus transportation costs) for shipping grain from Minneapolis, MN, to Japan through the U.S. Gulf increased for corn but decreased slightly for soybeans, ranging from $213 to $419 per metric ton (mt). Quarter-to-quarter landed costs for shipping grain from Minnesota to Japan through the Gulf increased over 1 percent for corn but decreased under 1 percent for soybeans (*see table 1*). Increased barge and ocean rates helped a quarter to quarter increase for corn total landed costs. Year-to-year landed costs for shipping grain through the Gulf to Japan decreased 9 percent for corn and 24 percent for soybeans due to lower shipping rates for each mode. The farm value of corn dropped to $138 per mt, a 1 percent decrease quarter to quarter and year to year. The farm value of soybeans decreased 2 percent to $419 per mt from the previous quarter, but dropped 24 percent year to year. Transportation costs for shipping corn from the Gulf to Japan accounted for 35 percent of the total landed cost during the third quarter, above the past quarter but below last year. The transportation costs share of the total landed cost for soybeans was 18 percent, also above the previous quarter and last year (*see table 1*).

Table 1: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	3rdQtr 14	2ndQtr 15	3rdQtr 15	Yr. to Yr.	Qtr to Qtr	3rdQtr 14	2ndQtr 15	3rdQtr 15	Yr. to Yr.	Qtr to Qtr
Truck [1]	11.70	9.18	8.50	-27.35	-7.41	11.70	9.18	8.50	-27.35	-7.41
Barge	38.32	30.50	31.33	-18.24	2.72	38.32	30.50	31.33	-18.24	2.72
Ocean	43.99	30.86	34.71	-21.10	12.48	43.99	30.86	34.71	-21.10	12.48
Total Transportation Cost	94.01	70.54	74.54	-20.71	5.67	94.01	70.54	74.54	-20.71	5.67
Farm Value [2]	139.49	139.36	138.31	-0.85	-0.75	455.62	350.66	344.90	-24.30	-1.64
Total Landed Cost	233.50	209.9	212.85	-8.84	1.41	549.63	421.2	419.44	-23.69	-0.42
Transportation % Landed Cost	40.26	33.61	35.02			17.10	16.75	17.77		

Source: USDA/AMS/TMP

[1] Trucking rates for second quaretr 2015 are revisions

[2] Source: USDA/NASS, Agricultural Prices

[3] Rail tariffs include fuel surcharges and revisions for heavy axle rail cars 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

Table 2: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. PNW

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent Change	
	3rdQtr 14	2ndQtr 15	3rdQtr 15	Yr. to Yr.	Qtr to Qtr	3rdQtr 14	2ndQtr 15	3rdQtr 15	Yr. to Yr.	Qtr to Qtr
Truck [1]	11.70	9.18	8.50	-27.35	-7.41	11.70	9.18	8.50	-27.35	-7.41
Rail [3]	56.27	49.17	53.16	-5.53	8.11	61.53	57.76	58.42	-5.05	1.14
Ocean	24.45	17.04	18.57	-24.05	8.98	24.45	17.04	18.57	-24.05	8.98
Total Transportation Cost	92.42	75.39	80.23	-13.19	6.42	97.68	83.98	85.49	-12.48	1.80
Farm Value [2]	139.49	139.36	138.31	-0.85	-0.75	455.62	350.66	344.90	-24.30	-1.64
Total Landed Cost	231.91	214.75	218.54	-5.77	1.76	553.30	434.64	430.39	-22.21	-0.98
Transportation % Landed Cost	39.85	35.11	36.71			17.65	19.32	19.86		

Source: USDA/AMS/TMP

[1] Trucking rates for second quaretr 2015 are revisions

[2] Source: USDA/NASS, Agricultural Prices

[3] Rail tariffs include fuel surcharges and revisions for heavy axle rail cars 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

Pacific Northwest Costs: Total quarter-to-quarter transportation costs for shipping corn and soybeans from Minneapolis, MN, to Japan via the PNW increased 6 and 2 percent, respectively, due to higher rail and ocean rates (*see Table 2*). Year-to-year transportation costs, however, were down 13 percent for corn and for soybeans, due to lower shipping rates for each mode. Specifically, quarter-to-quarter rail rates for shipping grain to the PNW were up 8 percent for corn and 1 percent for soybeans, but year-to-year rail rates for shipping grain to the PNW were down 6 percent for corn and 5 percent for soybeans as demand for rail service decreased. PNW ocean rates were up 9 percent quarter to quarter, but decreased 24 percent year to year.

PNW landed costs increased 2 percent for corn quarter to quarter but decreased 1 percent for soybeans (*see table 2*). Quarter-to-quarter total landed costs for shipping corn through the PNW increased as rail and ocean rates increased, but lower truck rates and farm values caused landed costs for shipping soybeans to decrease. Landed costs for shipping corn and soybeans through the PNW to Japan ranged from $219 to $430 per mt. Year-to-year PNW landed costs decreased 6 percent for corn and 22 percent for soybeans, primarily because of lower trucking and ocean rates. Transportation costs for corn shipped through the PNW to Japan accounted for about 37 percent of the total landed costs during the third quarter, greater than the previous quarter but below last year. Third quarter transportation costs for soybeans shipped through the PNW to Japan accounted for 20 percent of the total landed cost, above the previous quarter and last year. The farm value of corn accounted for 63 percent of the total landed cost for shipping to Japan from the PNW during the third quarter, while soybean farm value accounted for 80 percent of the total landed cost.

Outlook: USDA's November World Agricultural Supply and Demand Estimates (WASDE) report projects 2015/16 corn exports to decrease 3 percent from last year, also a drop from the October 2015 estimate. The estimate was lowered despite a slight increase in projected yield per acre and production for corn. The November WASDE 2015/16 soybean exports projection is 2 percent above the October estimate but percent below last year. According to USDA's National Agricultural Statistics Service, the U.S. had a record year for soybean production, harvesting an estimated 3.98 billion bushels in 2015/16.

Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Unit Train	Shuttle		Gulf	Pacific
12/02/15	162	271	208	156	n/a	n/a
11/25/15	164	266	204	153	132	110

[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	11/27/2015	11/20/2015
Corn	IL--Gulf	n/a	-0.59
Corn	NE--Gulf	n/a	-0.80
Soybean	IA--Gulf	n/a	-1.19
HRW	KS--Gulf	n/a	-1.55
HRS	ND--Portland	n/a	-1.80

Note: nq = no quote

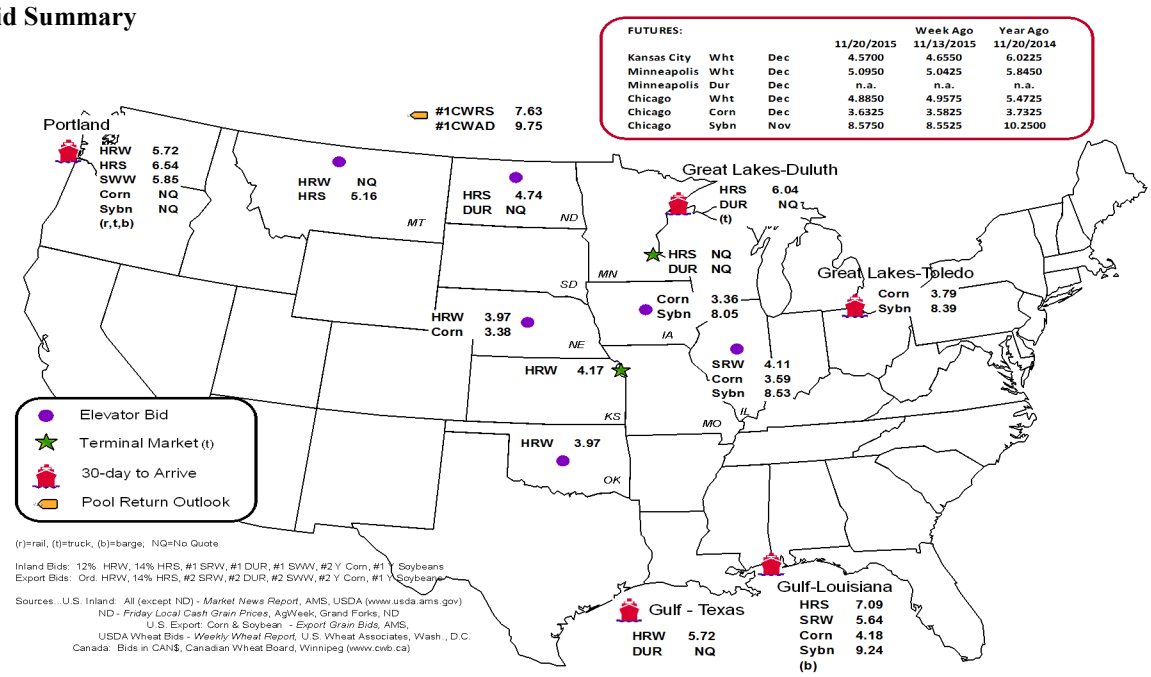
Source: Transportation & Marketing Programs/AMS/USDA

n/a: quotes are not available due to the holiday

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]
11/25/2015[p]	321	1,340	6,031	1,153	8,845	11/21/2015	2,262
11/18/2015[r]	461	1,213	5,402	880	7,956	11/14/2015	2,281
2015 YTD[r]	27,794	53,273	212,069	23,735	316,871	2015 YTD	89,635
2014 YTD[r]	37,205	75,243	226,754	26,997	366,199	2014 YTD	90,639
2015 YTD as % of 2014 YTD	75	71	94	88	87	% change YTD	99
Last 4 weeks as % of 2014[2]	46	92	85	98	80	Last 4wks % 2014	135
Last 4 weeks as % of 4-year avg.[2]	68	136	113	104	104	Last 4wks % 4 yr	143
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	96,467
Total 2013	31,550	71,388	168,826	25,176	296,940	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.

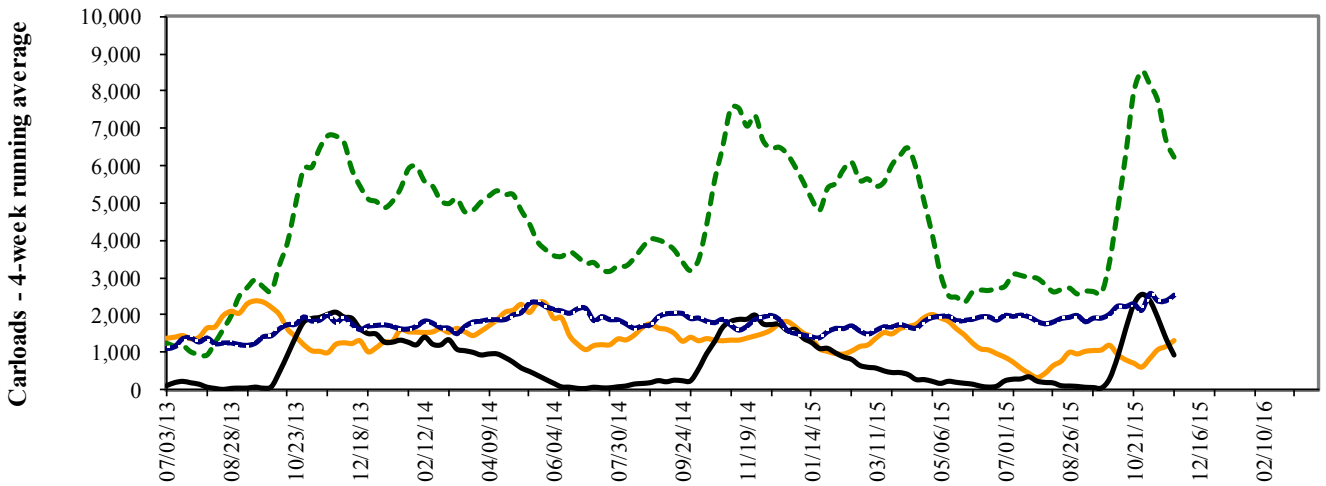
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



Pacific Northwest: 4 wks. ending 11/25--down 15% from same period last year; up 13% from 4-year average

Texas Gulf: 4 wks ending 11/25, down 8% from same period last year; up 36% from 4-year average

Miss. River: 4 wks. ending 11/25--down 54% from same period last year; down 32% from 4-year average

Cross-border: 4 wks. ending 11/21-- up 35% from same period last year; up 43% from 4-year average

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	
11/21/2015	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,893	2,902	10,772	735	5,317	21,619	4,368	4,448
This week last year	2,189	3,432	10,290	998	5,815	22,724	5,477	5,468
2015 YTD	92,886	133,645	471,658	41,233	238,803	978,225	189,021	208,809
2014 YTD	86,709	131,361	411,739	41,287	257,390	928,486	210,435	242,439
2015 YTD as % of 2014 YTD	107	102	115	100	93	105	90	86
Last 4 weeks as % of 2014*	79	87	114	77	92	99	89	104
Last 4 weeks as % of 3-yr avg.*	85	84	119	96	106	106	97	91
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

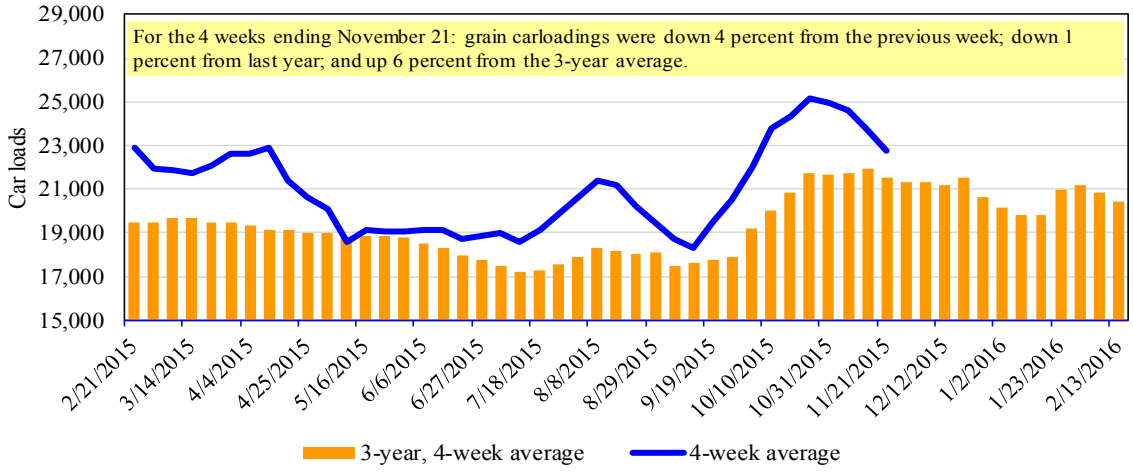
[1]The past 4 weeks of this year as a percent of the same 4 weeks last year.

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

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:		Delivery period							
11/26/2015		Dec-15	Dec-14	Jan-16	Jan-15	Feb-16	Feb-15	Mar-16	Mar-15
BNSF[3]	COT grain units	no bids	no offer	no bids	no offer	no bids	no offer	no bids	no offer
	COT grain single-car[5]	no bids	no offer	no bids	no offer	no bids	no offer	no bids	no offer
UP[4]	GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
	GCAS/Region 2	no bids	no offer	no bids	no offer	no bids	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

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

4UP - GCAS = Grain Car Allocation System

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

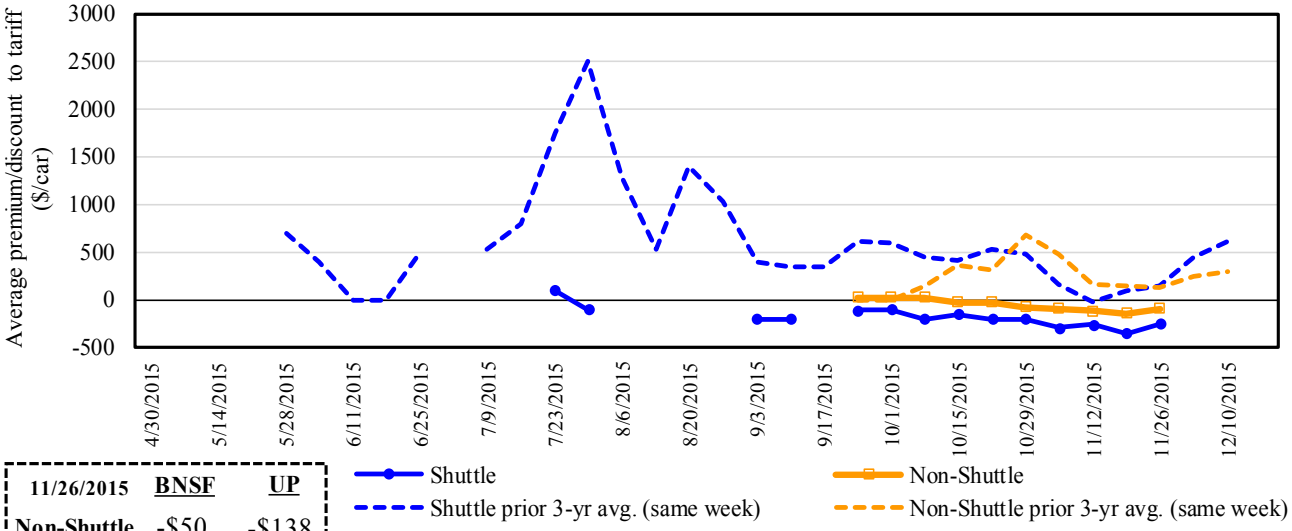
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

[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 December 2015, Secondary Market

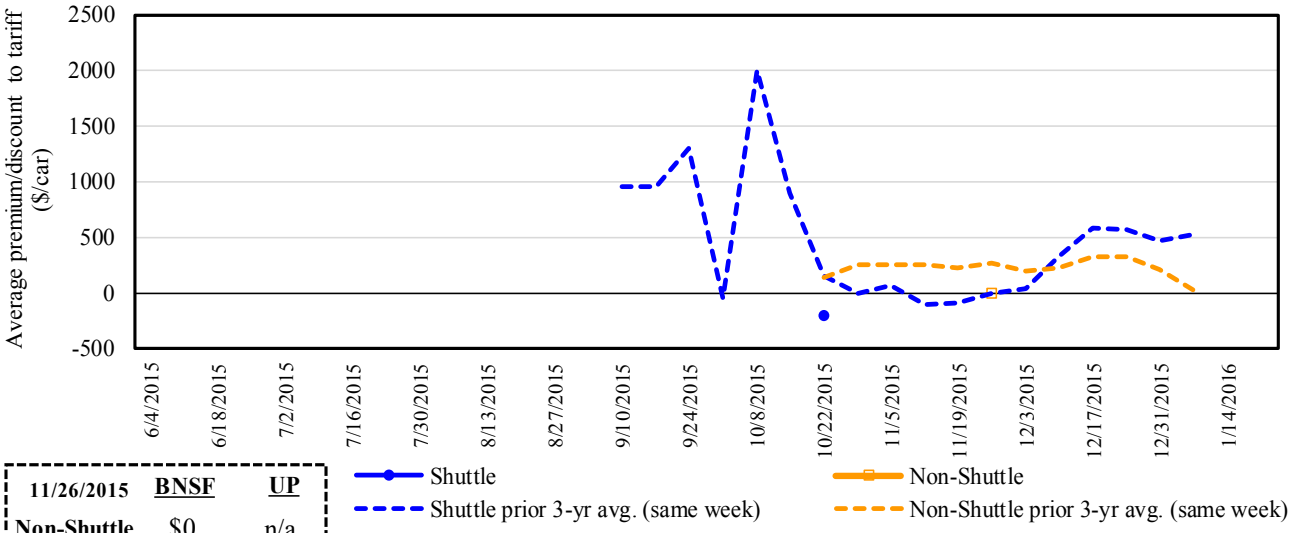


11/26/2015	BNSF	UP
Non-Shuttle	-$50	-$138
Shuttle	-$200	-$300

Average Non-shuttle bids/offers rose $50 this week, and are $119 below the peak.
Average Shuttle bids/offers rose $100 this week and are $350 below 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 January 2016, Secondary Market



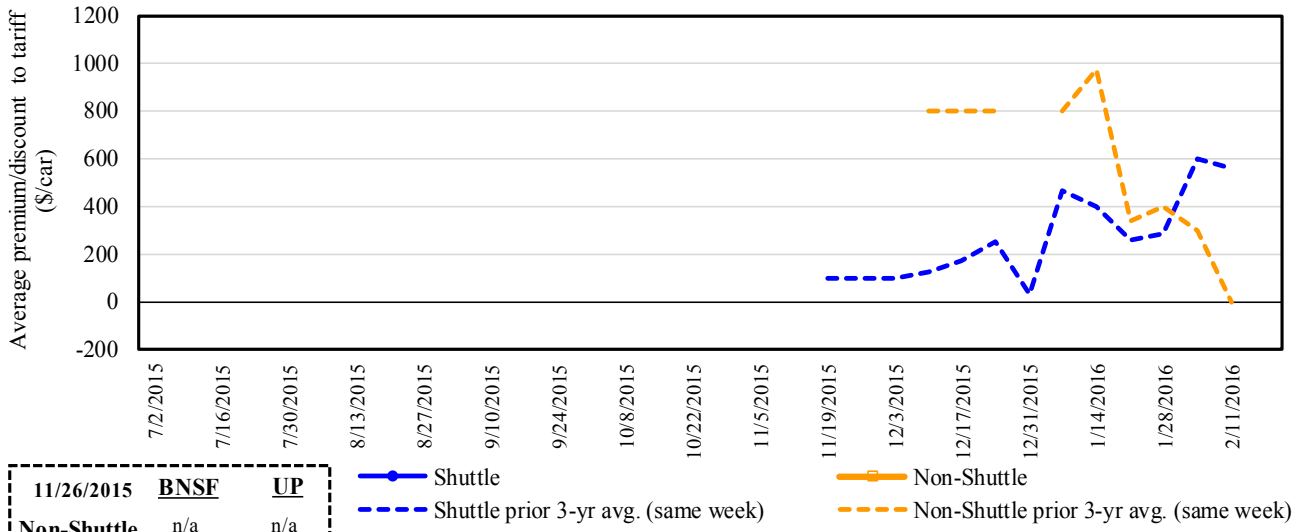
11/26/2015	BNSF	UP
Non-Shuttle	$0	n/a
Shuttle	n/a	n/a

Average Non-shuttle bids/offers are unchanged this week, and are at the peak.
There were no Shuttle bids/offers this week.

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 February 2016, Secondary Market



11/26/2015	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

There were no Non-Shuttle bids/offers this week.
There were no Shuttle bids/offers this week.

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: 11/26/2015		Delivery period					
		Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	May-16
Non-shuttle	**BNSF-GF**	**(50)**	**0**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	75	n/a	n/a	n/a	n/a	n/a
	Change from same week 2014	(350)	(200)	n/a	n/a	n/a	n/a
	UP-Pool	**(138)**	**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 2014	(288)	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**(200)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	150	n/a	n/a	n/a	n/a	n/a
	Change from same week 2014	(75)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**(300)**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	50	n/a	n/a	n/a	n/a	n/a
	Change from same week 2014	(300)	n/a	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: 12/1/2015	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$3,605	$455	$40	$1	$14
	Grand Forks, ND	Duluth-Superior, MN	$3,563	$3	$35	$1	-$3
	Wichita, KS	Los Angeles, CA	$6,950	$15	$69	$2	$4
	Wichita, KS	New Orleans, LA	$4,243	$801	$50	$1	$17
	Sioux Falls, SD	Galveston-Houston, TX	$6,486	$13	$65	$2	$5
	Northwest KS	Galveston-Houston, TX	$4,511	$878	$54	$1	$17
	Amarillo, TX	Los Angeles, CA	$4,710	$1,221	$59	$2	$20
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,681	$905	$46	$1	$26
	Toledo, OH	Raleigh, NC	$6,061	$0	$60	$2	$16
	Des Moines, IA	Davenport, IA	$2,168	$192	$23	$1	$6
	Indianapolis, IN	Atlanta, GA	$5,004	$0	$50	$1	$11
	Indianapolis, IN	Knoxville, TN	$4,311	$0	$43	$1	$14
	Des Moines, IA	Little Rock, AR	$3,444	$563	$40	$1	$14
	Des Moines, IA	Los Angeles, CA	$5,052	$1,641	$66	$2	$13
Soybeans	Minneapolis, MN	New Orleans, LA	$3,699	$52	$37	$1	-$10
	Toledo, OH	Huntsville, AL	$5,051	$0	$50	$1	$24
	Indianapolis, IN	Raleigh, NC	$6,178	$0	$61	$2	$16
	Indianapolis, IN	Huntsville, AL	$4,529	$0	$45	$1	$23
	Champaign-Urbana, IL	New Orleans, LA	$4,395	$905	$53	$1	$23
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,953	$9	$39	$1	$1
	Wichita, KS	Galveston-Houston, TX	$3,919	$7	$39	$1	$7
	Chicago, IL	Albany, NY	$5,492	$0	$55	$1	$22
	Grand Forks, ND	Portland, OR	$5,611	$15	$56	$2	$0
	Grand Forks, ND	Galveston-Houston, TX	$5,931	$16	$59	$2	-$9
	Northwest KS	Portland, OR	$5,478	$1,439	$69	$2	$20
Corn	Minneapolis, MN	Portland, OR	$5,000	$19	$50	$1	-$10
	Sioux Falls, SD	Tacoma, WA	$4,960	$17	$49	$1	-$9
	Champaign-Urbana, IL	New Orleans, LA	$3,481	$905	$44	$1	$26
	Lincoln, NE	Galveston-Houston, TX	$3,600	$10	$36	$1	-$5
	Des Moines, IA	Amarillo, TX	$3,795	$708	$45	$1	$14
	Minneapolis, MN	Tacoma, WA	$5,000	$18	$50	$1	-$10
	Council Bluffs, IA	Stockton, CA	$4,640	$19	$46	$1	-$6
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,490	$17	$55	$1	-$9
	Minneapolis, MN	Portland, OR	$5,510	$19	$55	$1	-$9
	Fargo, ND	Tacoma, WA	$5,380	$15	$54	$1	-$8
	Council Bluffs, IA	New Orleans, LA	$4,425	$1,044	$54	$1	$14
	Toledo, OH	Huntsville, AL	$4,226	$0	$42	$1	$30
	Grand Island, NE	Portland, OR	$5,360	$1,473	$68	$2	$16

[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: 12/1/2015							
				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	$7,459	$16	$76.38	$2.08	3
	OK	Cuautitlan, EM	$6,514	$20	$66.75	$1.81	-7
	KS	Guadalajara, JA	$6,995	$19	$71.66	$1.95	-8
	TX	Salinas Victoria, NL	$4,142	$7	$42.39	$1.15	1
Corn	IA	Guadalajara, JA	$8,397	$22	$86.02	$2.18	-3
	SD	Celaya, GJ	$7,840	$21	$80.32	$2.04	-5
	NE	Queretaro, QA	$7,879	$20	$80.71	$2.05	-3
	SD	Salinas Victoria, NL	$6,545	$16	$67.04	$1.70	3
	MO	Tlalnepantla, EM	$7,238	$19	$74.15	$1.88	-3
	SD	Torreon, CU	$7,240	$18	$74.16	$1.88	0
Soybeans	MO	Bojay (Tula), HG	$8,652	$19	$88.59	$2.41	0
	NE	Guadalajara, JA	$9,142	$21	$93.62	$2.55	-1
	IA	El Castillo, JA	$9,470	$21	$96.97	$2.64	0
	KS	Torreon, CU	$7,439	$13	$76.14	$2.07	1
Sorghum	NE	Celaya, GJ	$7,404	$19	$75.84	$1.92	-6
	KS	Queretaro, QA	$7,563	$12	$77.39	$1.96	6
	NE	Salinas Victoria, NL	$6,168	$14	$63.16	$1.60	4
	NE	Torreon, CU	$6,827	$16	$69.92	$1.77	1

[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

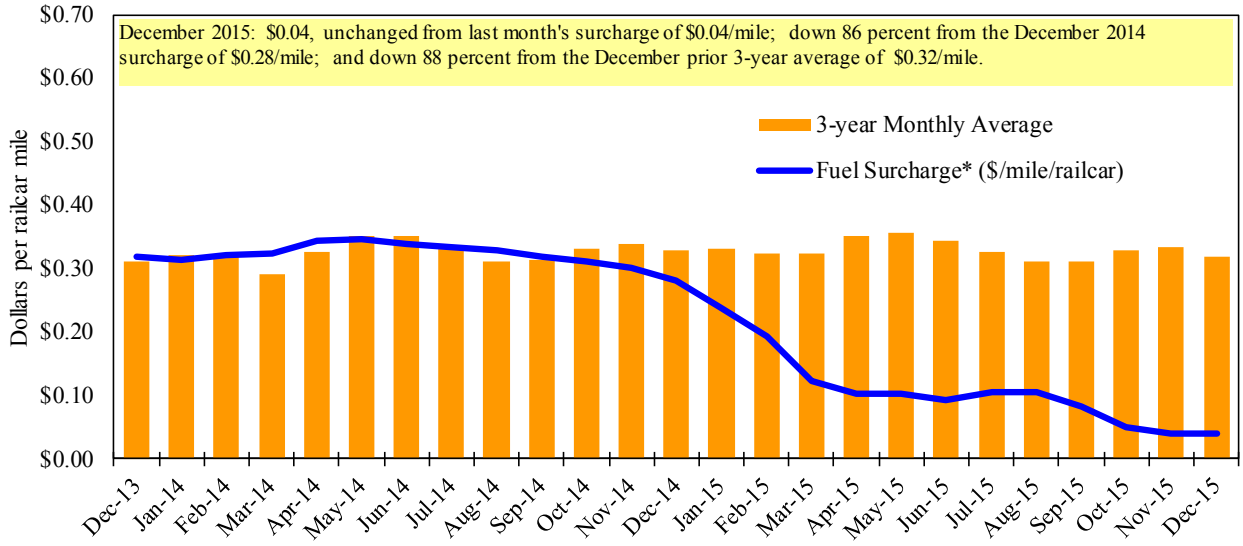
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

[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.

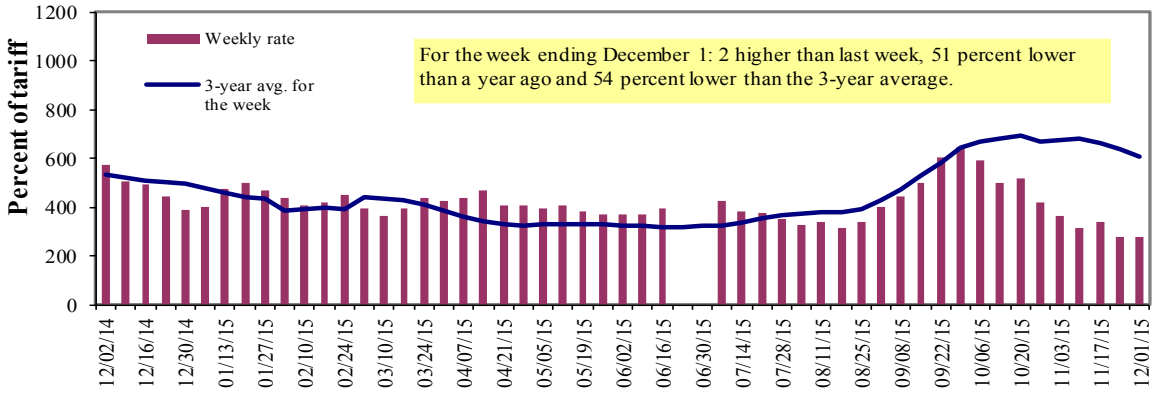
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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]	12/1/2015	-	-	280	190	195	195	170
	11/24/2015	-	308	275	190	198	198	173
$/ton	12/1/2015	-	-	12.99	7.58	9.15	7.88	5.34
	11/24/2015	-	16.39	12.76	7.58	9.29	8.00	5.43
Current week % change from the same week:								
	Last year	-	-	-51	-52	-56	-56	-50
	3-year avg. [2]	-	-	-54	-64	-66	-66	-60
Rate[1]	January	-	-	320	213	205	205	183
	March	-	-	320	213	207	207	183

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

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.

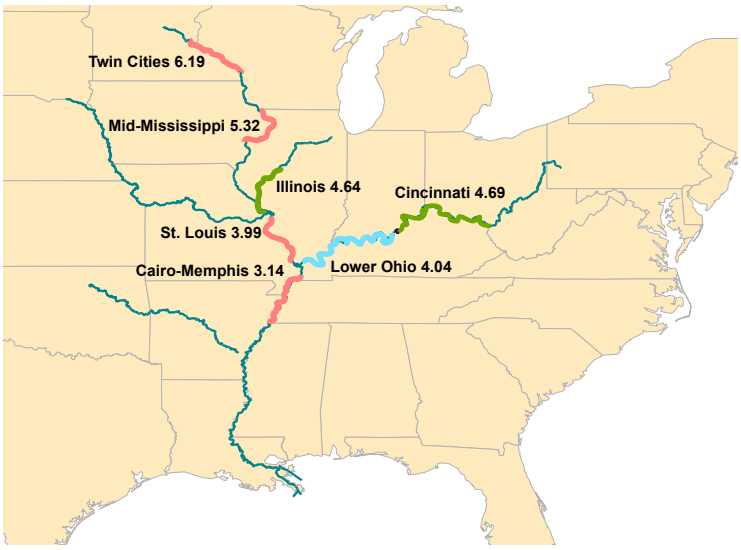
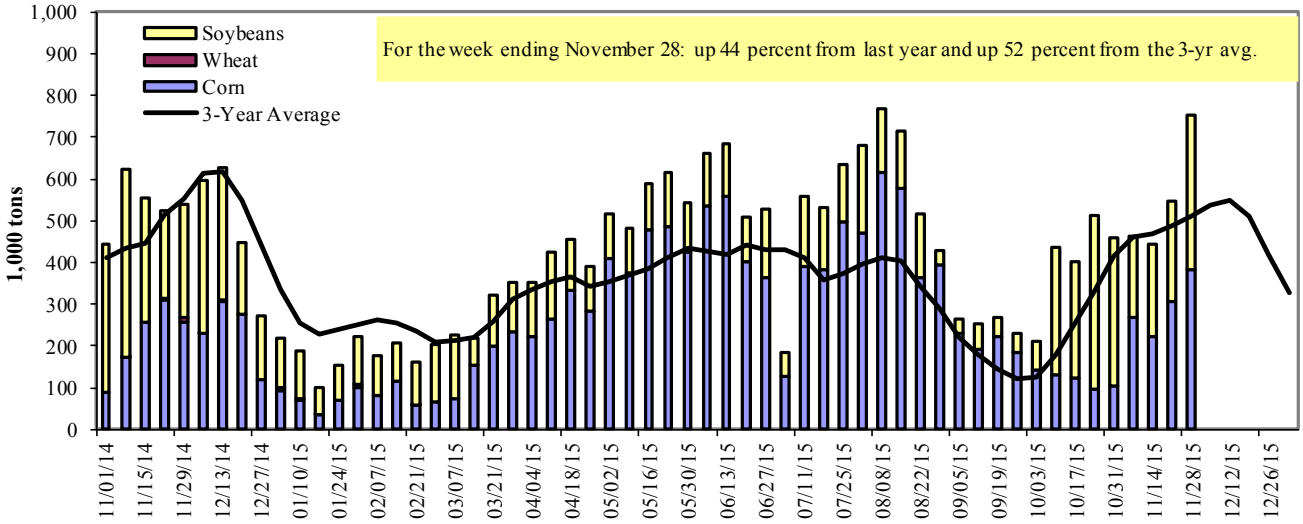


Figure 10

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 11/28/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	272	5	223	0	501
Winfield, MO (L25)	301	18	261	0	580
Alton, IL (L26)	365	18	373	0	756
Granite City, IL (L27)	383	21	371	3	778
Illinois River (L8)	72	0	104	0	175
Ohio River (L52)	61	7	153	14	235
Arkansas River (L1)	0	0	87	0	87
Weekly total - 2015	444	28	610	17	1,100
Weekly total - 2014	351	17	557	1	926
2015 YTD[1]	18,361	1,736	11,228	324	31,649
2014 YTD	19,171	2,109	9,652	216	31,147
2015 as % of 2014 YTD	96	82	116	150	102
Last 4 weeks as % of 2014[2]	109	201	72	1,425	87
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.

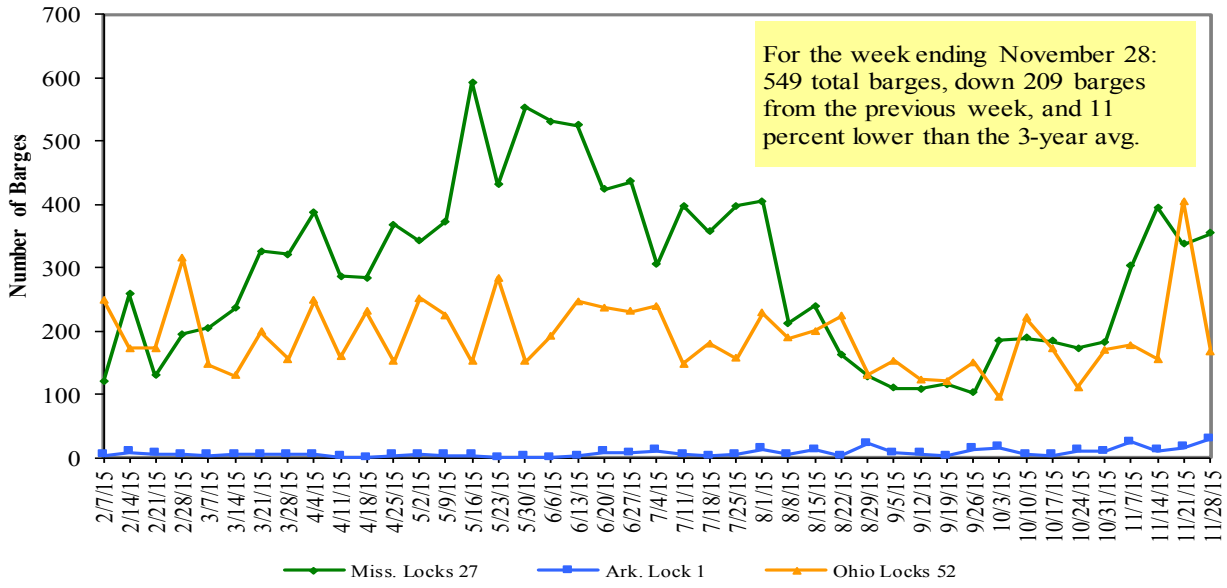
[2] As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

Source: U.S. Army Corps of Engineers

Figure 11

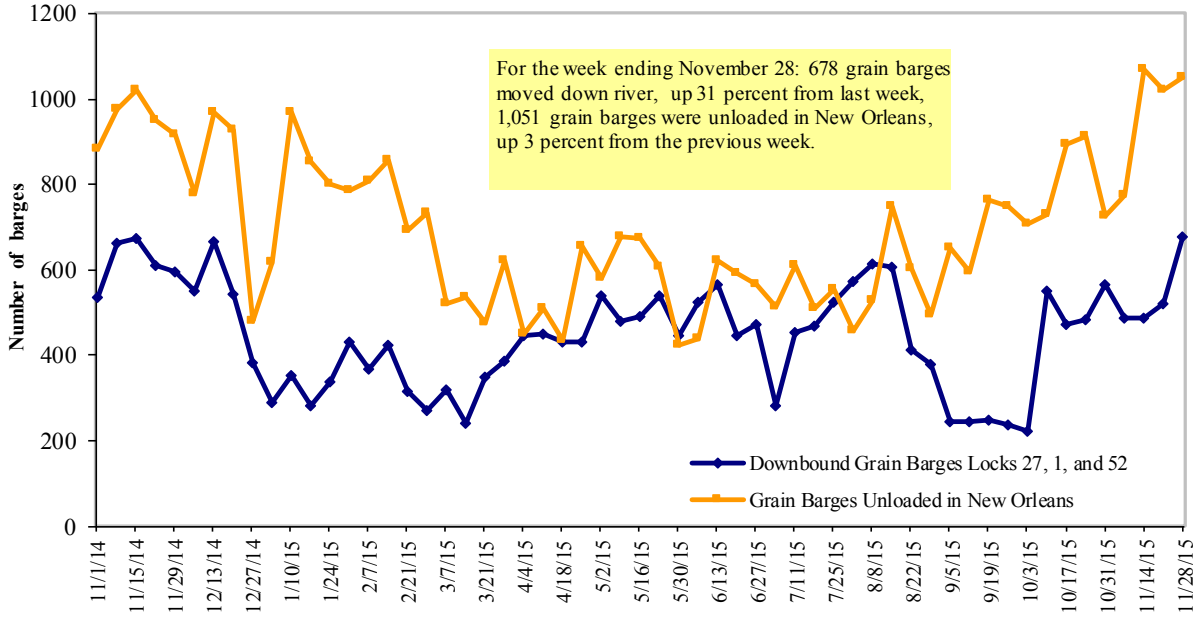
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 11/30/2015 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	2.455	-0.014	-1.054
	New England	2.527	0.003	-1.060
	Central Atlantic	2.567	-0.018	-1.023
	Lower Atlantic	2.355	-0.015	-1.074
II	Midwest[2]	2.411	-0.030	-1.291
III	Gulf Coast[3]	2.254	-0.026	-1.247
IV	Rocky Mountain	2.451	-0.023	-1.276
V	West Coast	2.624	-0.029	-1.068
	West Coast less California	2.510	-0.045	-1.141
	California	2.717	-0.016	-1.009
Total	U.S.	2.421	-0.024	-1.184

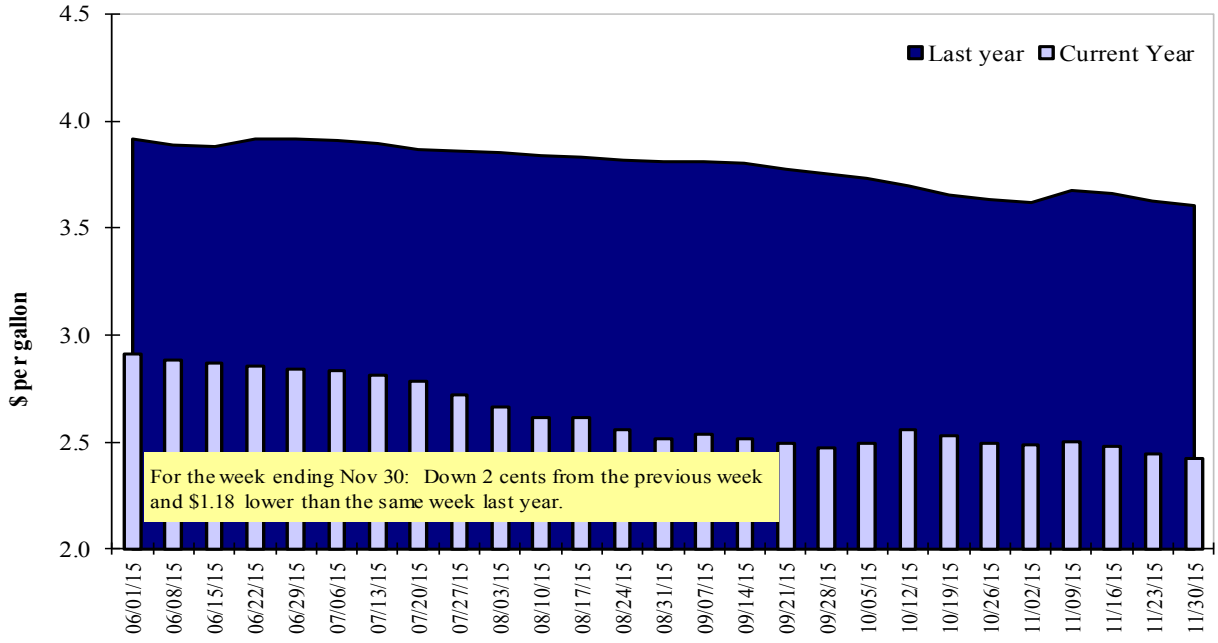
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[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]									
11/19/2015	1,225	629	1,592	1,035	49	4,529	10,272	14,495	29,296
This week year ago	1,478	893	1,600	921	135	5,027	13,068	20,191	38,286
Cumulative exports-marketing year[2]									
2015/16 YTD	2,695	1,801	2,918	1,633	512	9,558	6,307	17,575	33,440
2014/15 YTD	3,721	2,071	3,640	1,854	302	11,587	8,511	18,280	38,378
YTD 2015/16 as % of 2014/15	72	87	80	88	170	82	74	96	87
Last 4 wks as % of same period 2014/15	77	69	96	106	44	88	68	77	75
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	32,194	46,619	101,149
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 corn and soybeans

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 11/19/2015	Commitments[2] 2015/16 Current MY	Commitments[2] 2014/15 Last MY	% change current MY from last MY	Exports[3] 3-year avg 2011-2013
	- 1,000 mt -			- 1,000 mt -
Japan	2,549	4,068	(37)	10,079
Mexico	6,773	5,352	27	8,145
Korea	262	1,153	(77)	2,965
Colombia	1,352	1,785	(24)	3,461
Taiwan	341	535	(36)	1,238
Top 5 Importers	**11,276**	**12,893**	**(13)**	**25,887**
Total US corn export sales	**16,580**	**21,579**	**(23)**	**34,445**
% of Projected	36%	45%		
Change from prior week	**2,036**	**945**		
Top 5 importers' share of U.S. corn export sales	68%	60%		75%
USDA forecast, November 2015	**45,802**	**47,430**	**(3)**	
Corn Use for Ethanol USDA forecast, November 2015	**131,445**	**132,309**	**(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

For the week ending 11/19/2015	Total Commitments[2] 2015/16 Current MY	2014/15 Last MY	% change current MY from last MY	Exports[3] 3-yr avg. 2011-13
	- 1,000 mt -			- 1,000 mt -
China	18,441	24,206	(24)	24,211
Mexico	1,537	1,697	(9)	2,971
Indonesia	489	807	(39)	1,895
Japan	1,062	860	23	1,750
Taiwan	606	894	(32)	1,055
Top 5 importers	**22,134**	**28,464**	**(22)**	**31,882**
Total US soybean export sales	**32,070**	**38,471**	**(17)**	**39,169**
% of Projected	69%	77%		
Change from prior week	1,174	1,409		
Top 5 importers' share of U.S. soybean export sales	69%	74%		**81%**
USDA forecast, November 2015	**46,730**	**50,218**	**(7)**	

(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

For the week ending 11/19/2015	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	1,401	1,935	(28)	3,113
Mexico	1,419	1,785	(21)	2,807
Nigeria	1,098	1,680	(35)	2,512
Philippines	1,500	1,430	5	2,105
Brazil	338	1,522	(78)	2,091
Korea	881	961	(8)	1,273
Taiwan	606	697	(13)	1,007
Indonesia	193	398	(52)	751
Colombia	446	419	6	662
Thailand	379	212		618
Top 10 importers	**7,880**	**10,826**	(27)	**16,939**
Total US wheat export sales	**14,087**	**16,614**	**(15)**	**26,361**
% of Projected	65%	71%		
Change from prior week	304	432		
Top 10 importers' share of U.S. wheat export sales	56%	65%		64%
USDA forecast, November 2015	**21,798**	**23,270**	**(6)**	

(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	For the Week Ending 11/26/15	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	134	161	83	9,823	11,388	86	87	91	12,436
Corn	0	0	n/a	7,086	7,493	95	3	0	7,781
Soybeans	496	414	120	9,711	9,616	101	65	102	12,887
Total	**630**	**575**	**110**	**26,620**	**28,497**	**93**	**68**	**88**	**33,104**
Mississippi Gulf									
Wheat	86	79	109	4,179	4,248	98	328	106	4,495
Corn	265	377	70	24,784	28,087	88	72	80	30,912
Soybeans	1,233	1,229	100	24,628	22,810	108	80	103	29,087
Total	**1,584**	**1,685**	**94**	**53,591**	**55,145**	**97**	**81**	**98**	**64,495**
Texas Gulf									
Wheat	18	26	69	3,347	5,736	58	85	66	6,120
Corn	0	0	n/a	624	509	123	n/a	0	580
Soybeans	0	106	0	673	672	100	76	125	949
Total	**18**	**133**	**14**	**4,645**	**6,917**	**67**	**80**	**86**	**7,649**
Interior									
Wheat	3	21	13	1,257	1,272	99	88	79	1,400
Corn	28	108	26	5,600	5,160	109	106	92	5,677
Soybeans	45	62	73	3,329	3,609	92	80	79	4,312
Total	**75**	**190**	**40**	**10,186**	**10,042**	**101**	**73**	**88**	**11,389**
Great Lakes									
Wheat	36	0	n/a	930	751	124	83	156	935
Corn	44	0	n/a	491	281	175	331	1,921	288
Soybeans	0	55	0	587	583	101	35	56	988
Total	**80**	**55**	**146**	**2,008**	**1,616**	**124**	**55**	**94**	**2,211**
Atlantic									
Wheat	13	0	n/a	435	551	79	1,939	857	553
Corn	0	0	n/a	275	814	34	0	0	816
Soybeans	110	87	127	1,548	1,550	100	86	102	2,119
Total	**124**	**87**	**142**	**2,258**	**2,916**	**77**	**88**	**102**	**3,487**
U.S. total from ports[2]									
Wheat	290	287	101	19,970	23,947	83	106	91	25,939
Corn	337	485	69	38,861	42,345	92	80	70	46,054
Soybeans	1,884	1,953	96	40,477	38,841	104	72	101	50,342
Total	**2,511**	**2,725**	**92**	**99,308**	**105,133**	**94**	**76**	**94**	**122,335**

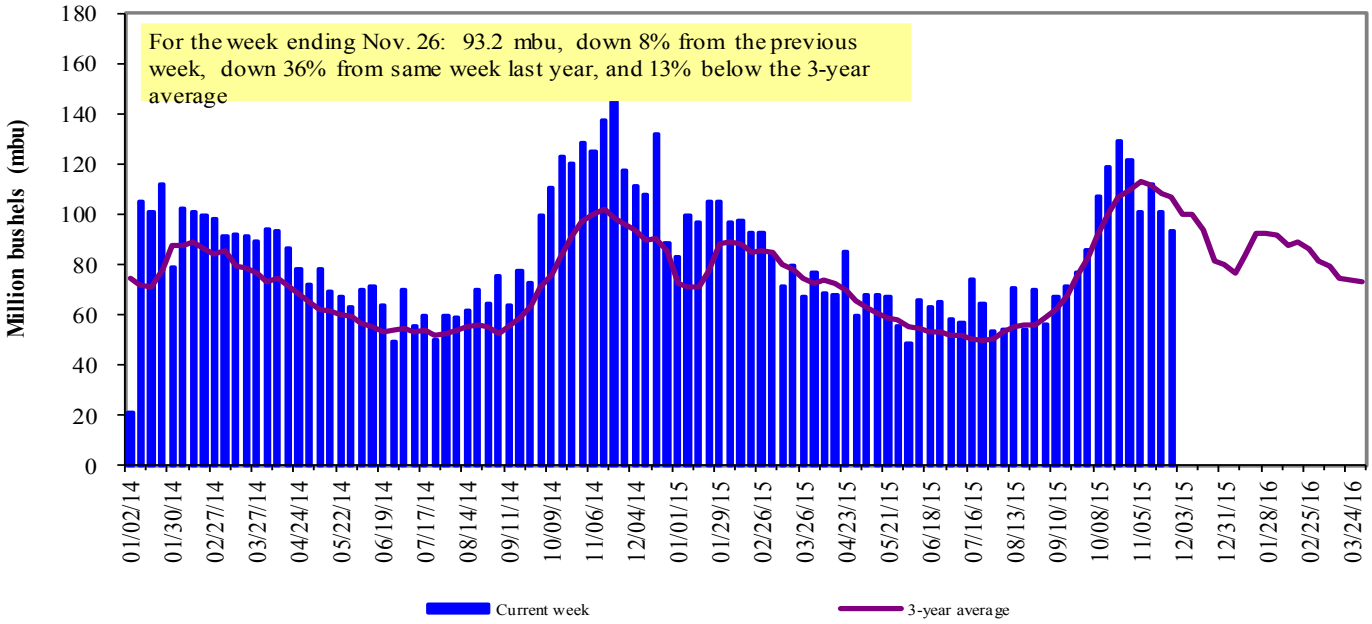
[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

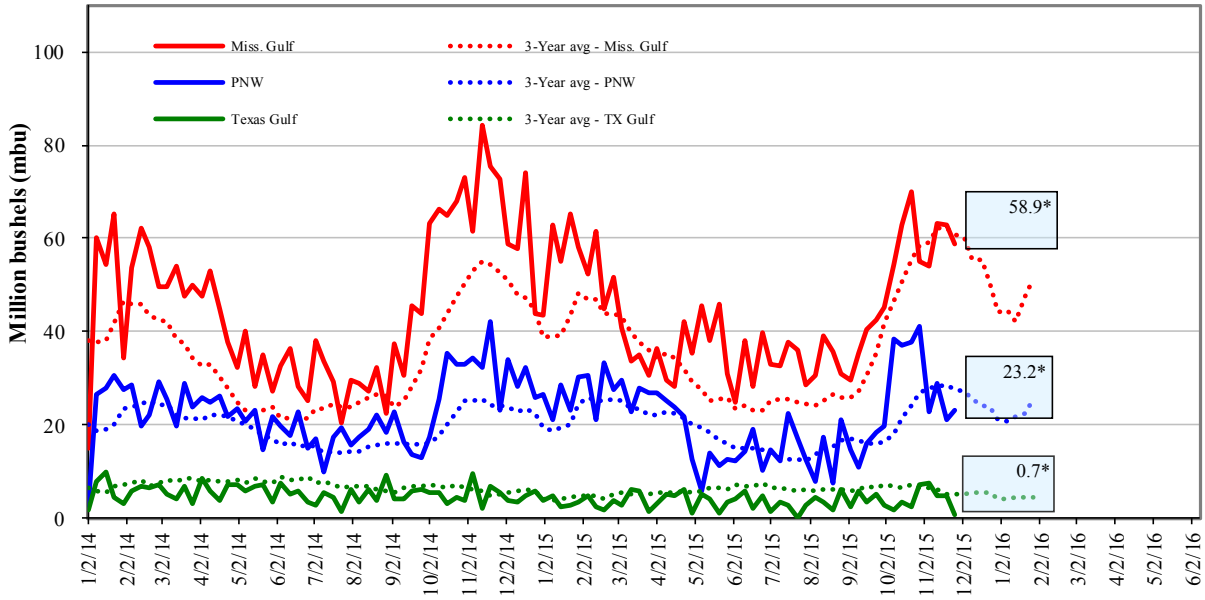


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

November 26: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 6	down 86	down 12	up 10
Last year (same week)	down 20	down 87	down 24	up 0.2
3-yr avg. (4-wk mov. avg.	down 3	down 87	down 10	up 3

Ocean Transportation

Table 17

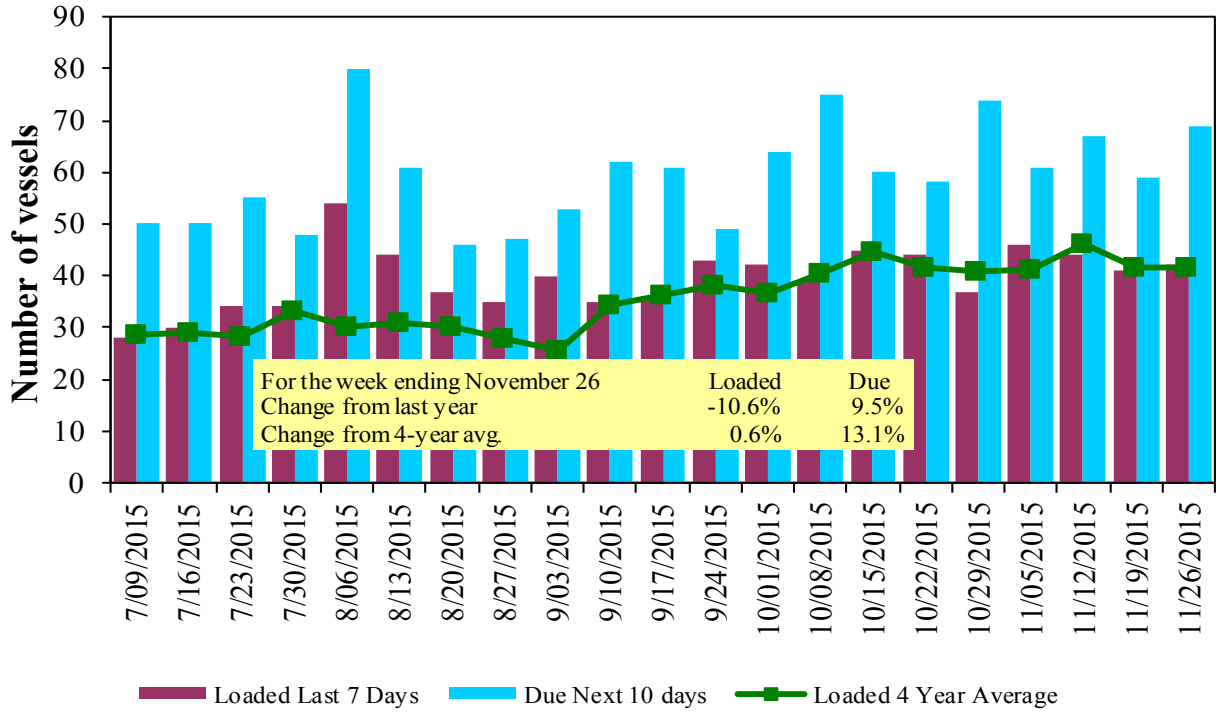
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
11/26/2015	51	42	69	n/a	n/a
11/19/2015	49	41	59	12	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

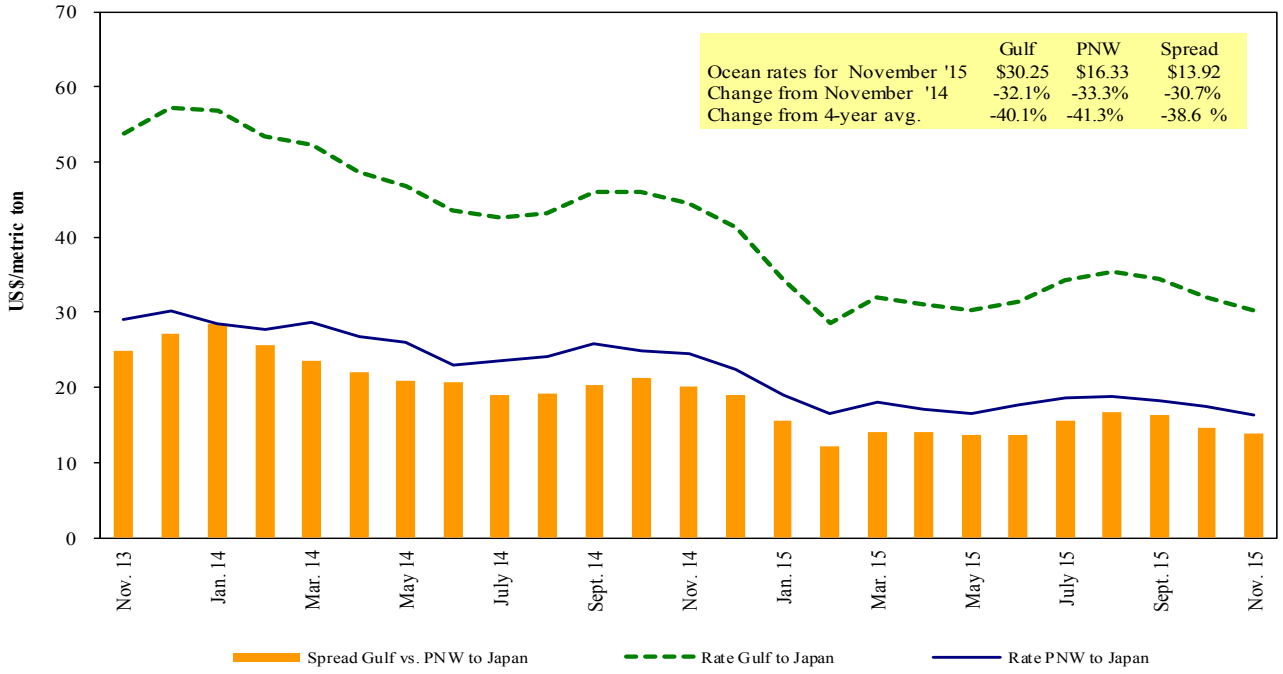


Source:Transportation & Marketing Programs/AMS/USDA

[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 11/28/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 15/24	60,000	24.50
U.S. Gulf	China	Heavy Grain	Dec 5/14	58,000	28.25
U.S. Gulf	China	Heavy Grain	Dec 1/10	49,000	25.50
U.S. Gulf	China	Heavy Grain	Nov 25/Dec 5	60,000	25.00
U.S. Gulf	China	Heavy Grain	Nov 25/30	60,000	29.50
U.S. Gulf	China	Heavy Grain	Nov 15/20	60,000	31.00 op 29.50
U.S. Gulf	China	Heavy Grain	Nov 1/30	55,000	34.50
U.S. Gulf	Guatemala	Soybean Meal	Nov 20/30	18,000	17.75
U.S Gulf	Guatemala	Corn	Nov 20/30	6,000	17.75
U.S. Gulf	Tanzania[1]	Wheat	Nov 24/Dec 3	12,000	148.97
U.S. Gulf	Honduras	Corn	Nov 5/15	6,700	44.00
U.S. Gulf	Japan	Grain	Dec 1/20	55,000	29.50
PNW	China	Heavy Grain	Nov 28/30	60,000	13.50
PNW	China	Heavy Grain	Nov 25/30	60,000	14.50
PNW	China	Heavy Grain	Nov 19/28	60,000	15.50
Brazil	Egypt Mediterranean	Heavy Grain	Nov 24/Dec 10	60,000	10.50
Brazil	Egypt	Grain	Dec 5/15	60,000	9.50
Brazil	Japan	Grain	Dec 16/31	60,000	19.75
Brazil	Vietnam	Grain	Dec 1/Jan 7	60,000	15.75
EC S America	China	Heavy Grain	Feb/Mar 16	60,000	18.50
France	Algeria	Wheat	Nov 23/30	30,000	11.50
Latvia	Algeria	Wheat	Nov 20/26	25,000	16.00

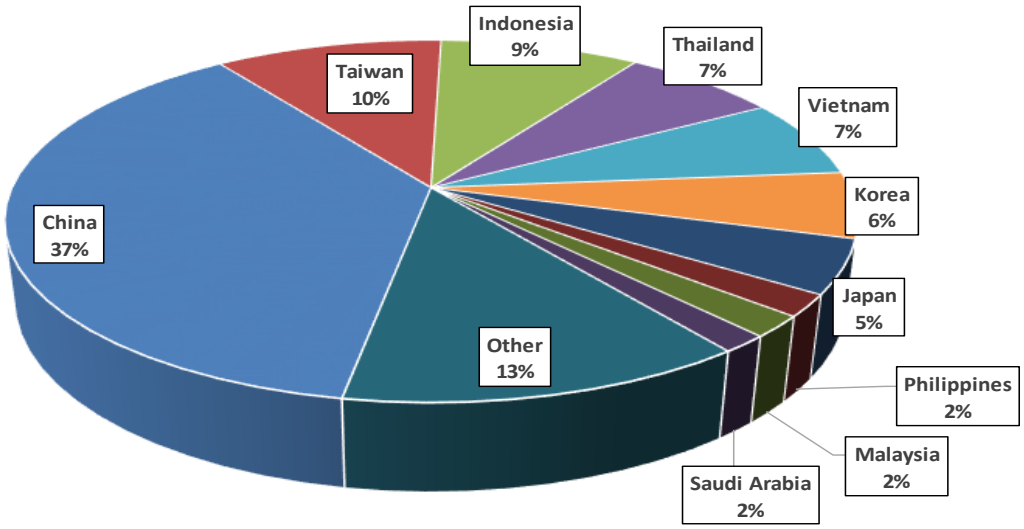
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

[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.

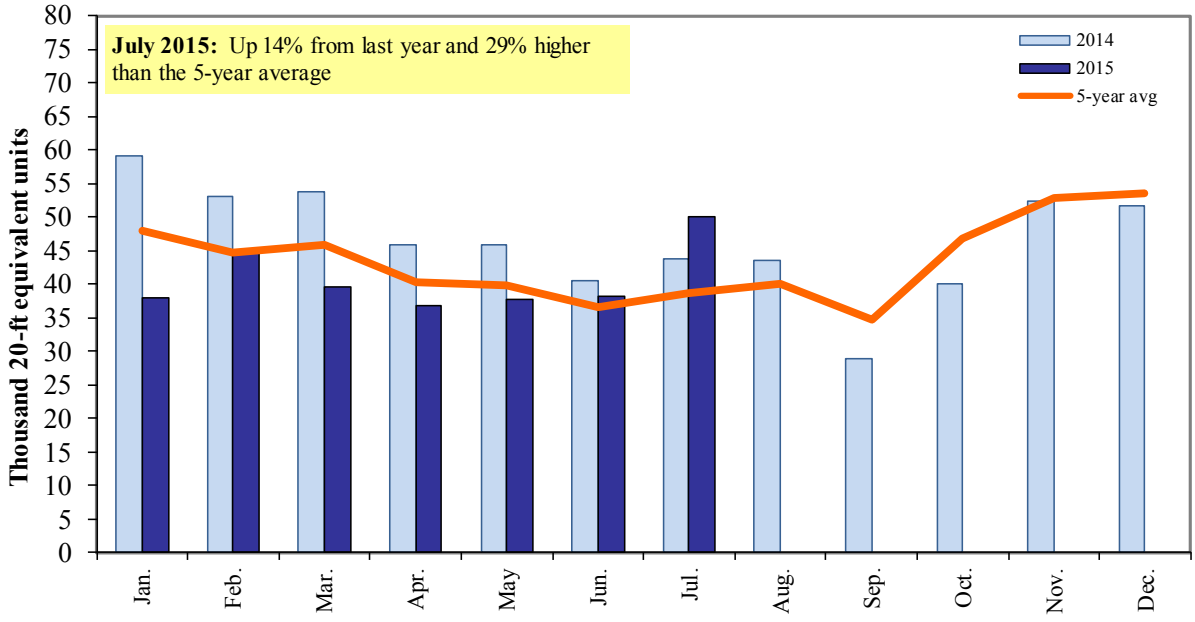
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-July 2015



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

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

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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