



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

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Panama Canal Conducts Trial Transit

On Monday, June 20, the Panama Canal Authority conducted another successful trial transit through the Expanded Canal. The transiting vessel, Oceanus, a U.S.-built crane ship, was maneuvered through the Pacific-facing Cocoli Locks by Pilots Fernando Jaén and Ricardo Varela. The first commercial transit through the Canal by China Ocean Shipping Company will take place on the inauguration day, Sunday, June 26. The Expanded Canal will double the waterway's cargo capacity, improving the Canal's efficiency, reliability, and customer service. The expanded waterway will provide greater economies of scale to global commerce by allowing larger vessels, Neopanamax ships, to transit the Canal. For more information, see <https://www.pancanal.com/eng/pr/press-releases/2016/06/20/pr594.html>.

Total Grain Inspections Down, but Pacific Northwest and Texas Gulf Increase

For the week ending June 16, **total inspections of grain** (corn, wheat, soybeans) for export reached 2.15 million metric tons (mmt), down 5 percent from the past week, up 30 percent from last year, and 53 percent above the 3-year average. Despite the drop in total grain inspections, Pacific Northwest (PNW) grain inspections increased 10 percent from the previous week, and Texas Gulf inspections jumped 33 percent. **Rail deliveries of grain** to the PNW and Texas Gulf ports were also up from last week. Grain inspections in the Mississippi Gulf, however, decreased 13 percent from the previous week. Total wheat and soybeans inspections jumped 40 and 111 percent, respectively, from the past week, but corn inspections decreased 28 percent as shipments to major destinations receded. Outstanding export sales (unshipped) of wheat and soybeans increased, but corn sales were down.

Barge Rates Reach Highest Levels Since Late November

Current grain barge rates have increased to the highest levels since November 2015, based on increased demand from higher shipments. As of June 21, St. Louis to New Orleans grain barge rates were 300 percent of tariff (\$11.97 per ton), a 40 percent increase compared to last week, and 18 percent above the 5-year average. Rates at other major barge origins had 25 to 51 percent weekly increases and were 10 to 27 percent above the 3-year average. The largest weekly increase for export-barged grain was at origins on the Ohio River. Corn shipments have been up as the last 4 weeks of corn inspections at the Mississippi Gulf were 120 percent of last year and 151 percent of the 3-year average. Continued concerns over tight corn supplies in South America, especially Brazil, may be driving the current increase in corn exports and may be causing the higher barge rates.

Snapshots by Sector

Export Sales

During the week ending June 9, **unshipped balances** of wheat, corn, and soybeans totaled 26.2 mmt, up 42 percent from the same time last year. Net weekly **wheat export sales** began the new marketing year at .763 mmt, up notably from the previous week. Net **corn export sales** were .910 mmt, down 39 percent from the previous week, and net **soybean export sales** were .817 mmt, up 8 percent from the past week.

Rail

U.S. Class I railroads originated 20,300 **grain carloads** for the week ending June 11, up 9 percent from the previous week, up 1 percent from last year, and up 13 percent from the 3-year average.

Average July shuttle **secondary railcar bids/offers** per car were \$63 below tariff for the week ending June 16, down \$38 from last week, and \$153 higher than last year. Average secondary non-shuttle secondary railcar bids/offers were \$6 below tariff, down \$6 from last week, and \$32 higher than last year.

Barge

For the week ending June 18, **barge grain movements** totaled 889,450 tons, 2 percent lower than last week, and up 31 percent from the same period last year.

For the week ending June 18, 568 grain barges **moved down river**, down 1 percent from last week; 725 grain barges were **unloaded in New Orleans**, down 6 percent from the previous week.

Ocean

For the week ending June 16, 38 **ocean-going grain vessels** were loaded in the Gulf, 31 percent more than the same period last year. Fifty vessels are expected to be loaded within the next 10 days, 2 percent less than the same period last year.

For the week ending June 16, 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 \$15.50 per metric ton, down 3 percent from the previous week.

Fuel

During the week ending June 20, U.S. average **diesel fuel prices** remained unchanged from the previous week at \$2.43 per gallon, down \$0.43 from the same week last year.

Feature Article/Calendar

Truck Transportation

Multimodal transportation facilitates agricultural development, allowing production to be specialized, rural communities to develop, and local, regional, and national economies to grow. Farm to market trucking was the first mode of freight transportation widely available in the Nation. It is easily obtained everywhere and offers flexible service. In this article, we examine the relationship between the trucking industry and agriculture, rural areas, and urban areas. The article also places special emphasis on the characteristics and importance of the trucking sector to agriculture and the grain industry.

Importance of Trucking to Agriculture and the Grain Industry

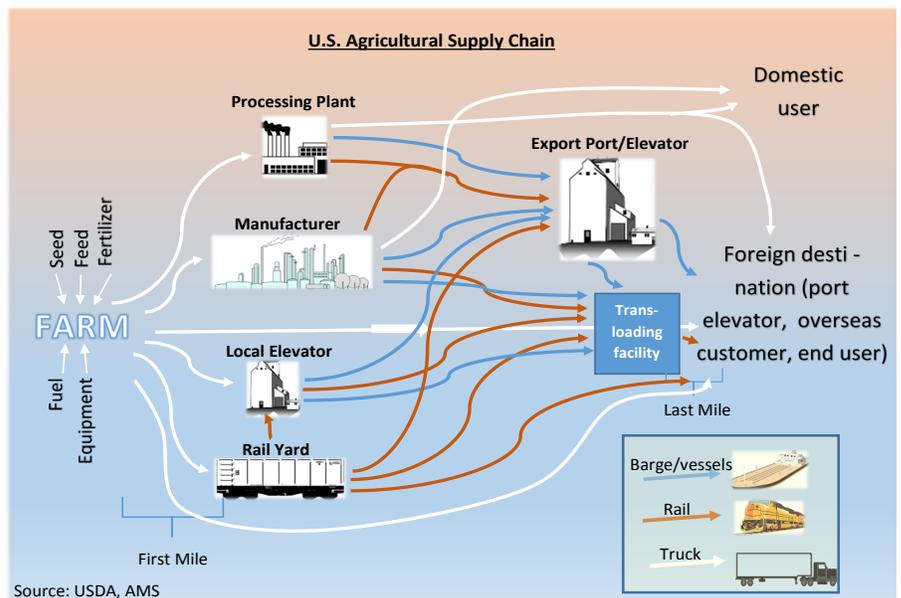
Trucking is a critical mode of transportation for rural America. It carries 70 percent of agricultural and food products, alcohols, fertilizers, lumber, wood products, paper, pulp, and paperboard articles.¹ In 2013, trucks carried 64 percent of all U.S. grain movements, 78 percent of domestic grain movements, and 20 percent of export grain movements.² Trucking links farmers, ranchers, manufacturers, and service industries to packing houses, grain elevators, ethanol plants, processors, feedlots, and rail, barge, and port terminals. Trucking's efficiency enables the United States to be competitive in the global marketplace for agricultural products. The linkage with rail, barge, and port facilities is especially important because of the complementary and competitive relationship among modes of transport. Disruptions in the multimodal supply chain, in rural and urban areas as well as at ports and inland terminals, impacts agricultural markets and prices paid to farmers.

In the farm to consumer supply chain, trucking provides the first miles, the last miles, and sometimes all the transportation miles (see figure). This is as true for agriculture as it is for other industries. Trucking is heavily used for farm inputs such as chemicals, seeds, feed, fertilizer, fuel, and equipment. Flexibility, timeliness, and door-to-door service are vital to growers, shippers, wholesalers, retailers, and consumers, especially for perishable agricultural products.

Nationwide, trucks transported nearly 10 billion tons of freight in 2014—68.8 percent of the total tonnage carried by all transport modes.³ Trucking accounted for 80.3 percent of the freight revenue from all transport modes, earning an estimated \$700.4 billion in 2014.⁴ Trucking is a critical link for the national economy, and moving agricultural products is a significant portion of total trucking activity. Agricultural freight accounted for 22 percent of all commodities transported by truck in 2012, the latest Commodity Flow Survey data available.⁵

Intramodal and intermodal competition moderates truck freight rates. Trucking is both a complement and a competitor to the major modes that are critical for the movement of agricultural products—rail, barge, and ocean shipping. The lack of, decline, or withdrawal of rail service in some areas, restrictions on access and routings to competing railroads, rail rate increases, and railroad consolidation have increased dependence on trucking in rural areas. Disruptions in barge traffic and sharp increases in barge rates increase the use of trucks as well.

In summary, trucking is vital to agriculture. It is the sector's most-used mode of transportation that provides a critical link between rural areas and distant markets, and links farms to other modes of transportation. It is efficient, competitive, provides reasonable rates, and is widely available in all areas of the country. Trucking is especially important to agricultural exporters.



¹ Bureau of Transportation Statistics and U.S. Census Bureau. 2012 Economic Census. Transportation—Commodity Flow Survey. February 2015.

² Sparger, Adam, and Nick Marathon. Transportation of U.S. Grains: A Modal Share Analysis, June 2015. U.S. Dept. of Agriculture, Agricultural Marketing Service. Web. <<http://dx.doi.org/10.9752/TS049.06-2015>>

³ American Trucking Associations. American Trucking Trends 2015. Arlington, VA. 2015.

⁴ Ibid.

⁵ Bureau of Transportation Statistics and U.S. Census Bureau. 2012 Economic Census. Transportation—Commodity Flow Survey. February 2015.

Truck Industry's Characteristics

Agriculture benefits from a highly competitive trucking industry because it depends heavily on this mode of transportation. Competition, both within trucking and with other transportation modes, helps keep costs down, making U.S. agricultural exports more competitive globally. Trucking is competitive because of:

- The ease of entry to and exit from businesses.
- The large number of owner-operator drivers.
- The large number of used trucks, tractors, and trailers available.

When combined, these phenomena enhance competition, squeezing profit margins for truckers and lowering freight rates for shippers. Over-the-road long-haul trucking is highly competitive, approaching what economists call atomistic or perfect competition.¹

Because of agriculture's reliance on trucking, the availability of drivers, especially during critical times such as planting and harvest, is critical to farmers' profitability. Economic downturns in the United States and other countries, fuel prices, tolls, weather, congestion, delays in loading and unloading, freight rates, regulations, and taxes, all affect the viability of trucking and the industry's ability to recruit and retain drivers. Over 97.3 percent of trucking companies are small businesses with fewer than 20 trucks; 90.6 percent have 6 or fewer trucks; and nearly 50 percent of trucking companies have only one truck.²

According to the April 2016 report by Avondale Partners, 3,585 trucks were removed from operation during the first quarter of 2016, compared to 4,405 for all of 2015.³ Avondale cited the decline in values for used trucks, lower freight demand, downward pressure on freight rates, and increasing fuel prices. In 2014, fuel costs were the largest marginal expense, at \$0.58 per mile, followed by driver wages at \$0.46 per mile, and truck/trailer lease or purchase payments at \$0.22 per mile.⁴

The need for truck and refrigeration unit modifications, accessories, or new trucks to meet Federal and State emissions rules add to the operating costs of both small and large trucking companies. Federal, State, and port grant programs are available to defray a portion of these costs, but the available resources are limited in comparison to the needs of the trucking industry. Electronic logging devices for drivers' hours of service compliance, entry-level driver training, and speed limiters are additional regulatory costs.

Because agriculture needs large amounts of chemicals, fertilizers, and fuel, farmers need commercial motor carriers that can safely haul hazardous materials. Federal statistics show that as of December 28, 2015, there were 521,211 active interstate freight carriers of which 68,113 were active hazardous materials carriers.⁵

Grain Truck Advisory

In a survey of the grain elevators, grain trucks were more available for hiring during the 1st quarter 2016, compared to the previous quarter, but slightly less available than a year ago (see [05/26/16 Grain Truck and Ocean Rates Advisory](#)). In addition, rates for shipping a truckload of grain for both short- and long haul distances generally decreased during the 1st quarter, compared to the previous quarter and a year ago (see table). The decline in rates may be partly due to lower diesel fuel prices during the year (see figure 13 inside the [Grain Transportation Report](#)). If the trends in rates and truck availability persist, these may be beneficial to farmers during the upcoming grain harvest seasons.

Average Grain Truck Rates for Short and Long Hauls, 1st Quarter 2016 (\$/mile per truckload)									
Region	25 miles	100 miles	200 miles	% increase from:					
				Last qtr			Same qtr Last year		
				25 mi	100 mi	200 mi	25 mi	100 mi	200 mi
National Average	\$3.36	\$2.11	\$2.08	-2.3%	-3.7%	-0.5%	-16.4%	-31.5%	-23.5%
North Central	\$3.28	\$2.04	\$1.92	-2.1%	-2.4%	-2.5%	-15.9%	-32.0%	-29.4%
Rocky Mountain	NA	NA	NA	-	-	-	-	-	-
South Central	\$2.88	\$2.15	\$2.02	4.0%	-5.7%	-5.6%	-26.0%	-28.6%	-24.6%
West	NA	NA	NA	-	-	-	-	-	-

n/a: data not available

Rates are based on trucks with 80,000 lbs gross vehicle weight limit

Source: [Transportation and Marketing Programs/AMS/USDA](#)

A truck is assumed to carry 55,000 lbs or 25 metric tons of grain. Rates per metric ton per mile can be calculated from rates per truckload.

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¹ Federal Motor Carrier Safety Administration, Analysis Division. 2010–2011 Hour of Service Rule Regulatory Impact Analysis RIN 2126-AB26. Docket No. FMCSA-2004-19608-28406. December 2011.

² American Trucking Associations. American Trucking Trends 2015. Arlington, VA. 2015.

³ Transport Topics. Fleet Failures Rise Sharply. April 18, 2016.

⁴ American Transportation Research Institute. An Analysis of the Operational Costs of Trucking: 2015 Update. September 2015.

⁵ Federal Motor Carrier Safety Administration. Motor Carrier Management Information System. Data snapshot as of December 28, 2015.

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit	Train Shuttle		Gulf	Pacific
06/22/16	163	253	199	225	126	110
06/15/16	163	250	202	174	126	113

¹Indicator: 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)

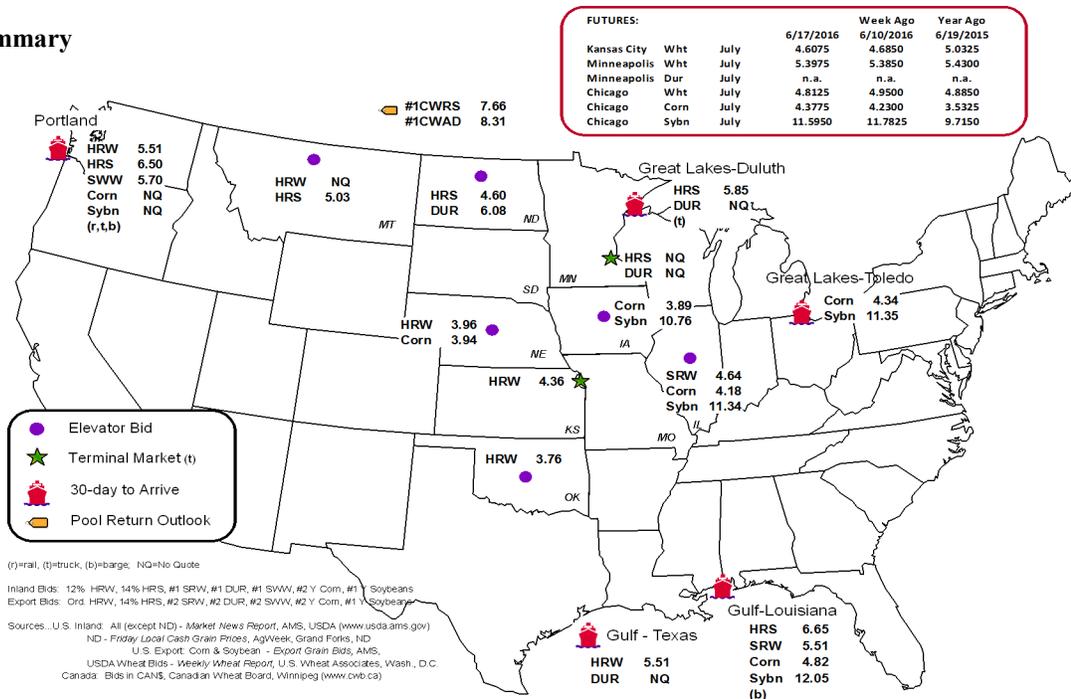
Commodity	Origin--Destination	6/17/2016	6/10/2016
Corn	IL--Gulf	-0.64	-0.62
Corn	NE--Gulf	-0.88	-0.87
Soybean	IA--Gulf	-1.29	-1.27
HRW	KS--Gulf	-1.15	-1.10
HRS	ND--Portland	-1.90	-1.98

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		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
6/15/2016 ^p	222	1,584	4,877	68	6,751	6/11/2016	1,926
6/08/2016 ^r	2	1,793	3,144	0	4,939	6/4/2016	1,863
2016 YTD ^r	6,054	35,064	118,665	9,264	169,047	2016 YTD	49,058
2015 YTD ^r	10,813	33,128	108,657	12,894	165,492	2015 YTD	41,714
2016 YTD as % of 2015 YTD	56	106	109	72	102	% change YTD	118
Last 4 weeks as % of 2015 ²	96	142	154	26	143	Last 4wks % 2015	106
Last 4 weeks as % of 4-year avg. ²	73	112	151	34	125	Last 4wks % 4 yr	118
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.

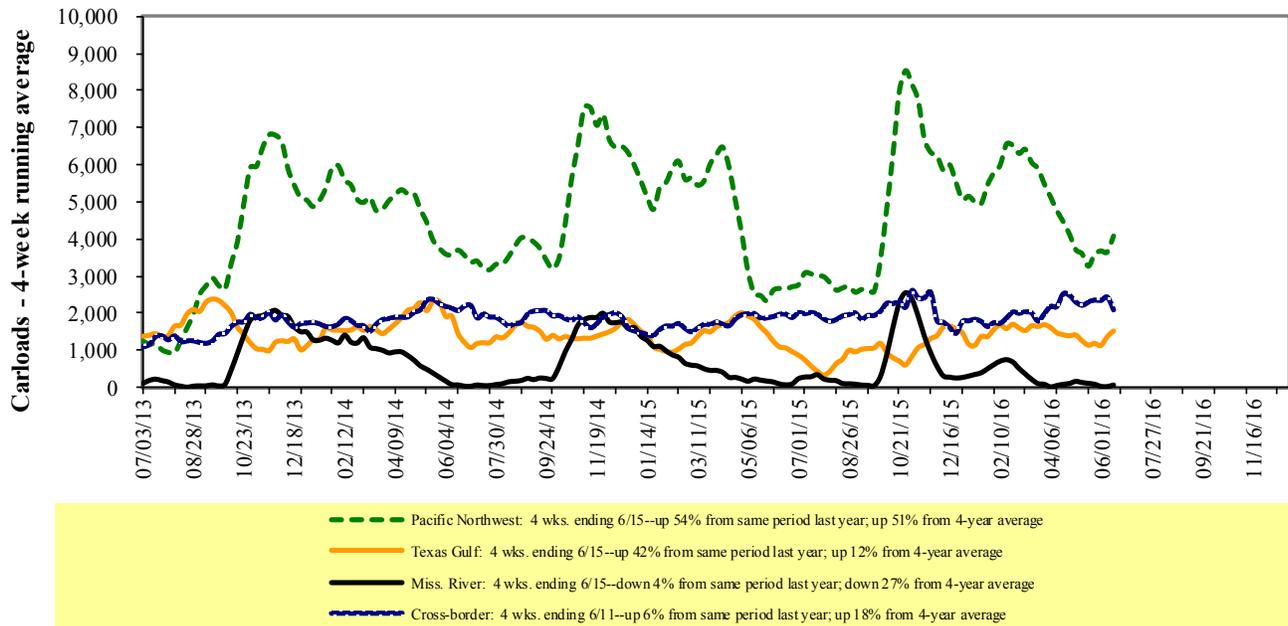
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

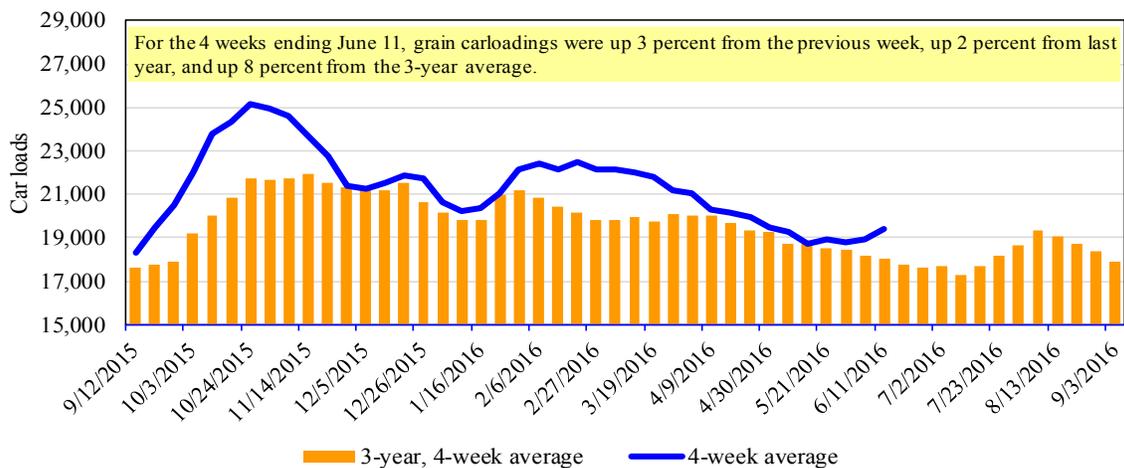
For the week ending:	East		West			U.S. total	Canada		
	6/11/2016	CSXT	NS	BNSF	KCS		UP	CN	CP
This week		1,275	3,316	10,610	337	4,762	20,300	2,678	4,330
This week last year		2,086	3,088	9,211	1,063	4,741	20,189	4,266	4,809
2016 YTD		41,951	63,813	230,433	19,832	119,544	475,573	73,981	98,292
2015 YTD		47,696	70,650	230,858	20,213	119,230	488,647	95,144	100,449
2016 YTD as % of 2015 YTD		88	90	100	98	100	97	78	98
Last 4 weeks as % of 2015*		84	98	108	77	104	102	64	80
Last 4 weeks as % of 3-yr avg.**		92	106	114	107	104	108	67	75
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 Offerings¹ (\$/car)²

For the week ending:		<u>Delivery period</u>							
6/16/2016		Jul-16	Jul-15	Aug-16	Aug-15	Sep-16	Sep-15	Oct-16	Oct-15
BNSF ³	COT grain units	0	0	0	4	0	11	0	10
	COT grain single-car ⁵	0	0..1	0..3	0..11	0..5	0..131	0..5	0..131
UP ⁴	GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a

¹Auction offerings are for single-car and unit train shipments only.

²Average 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.

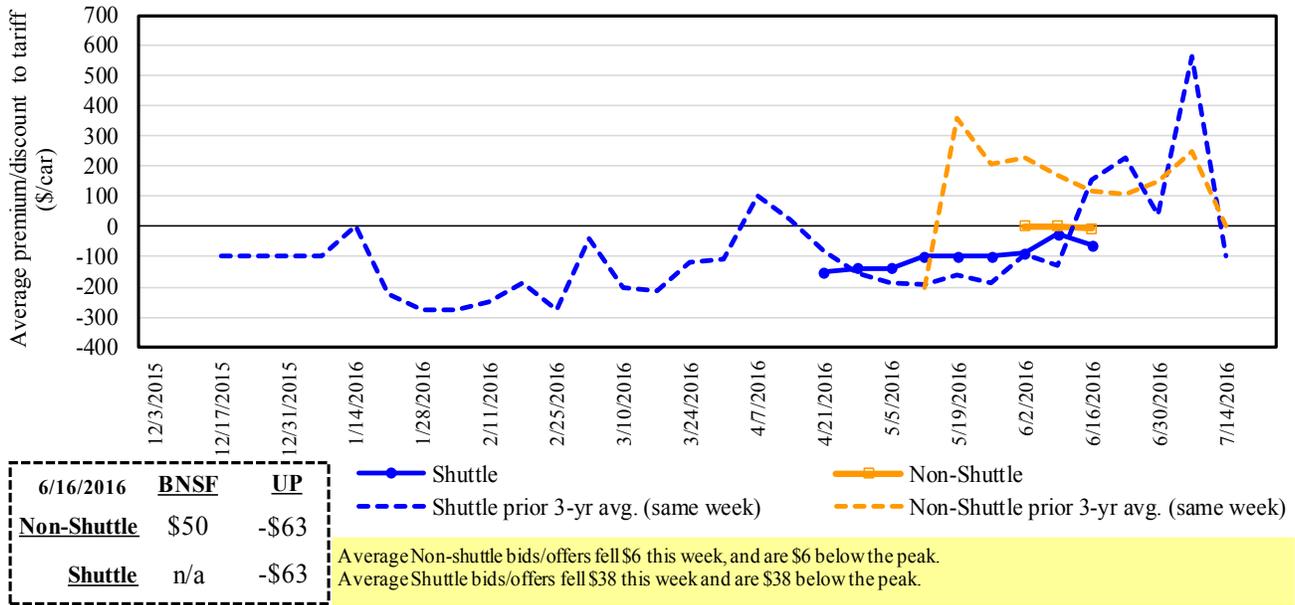
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

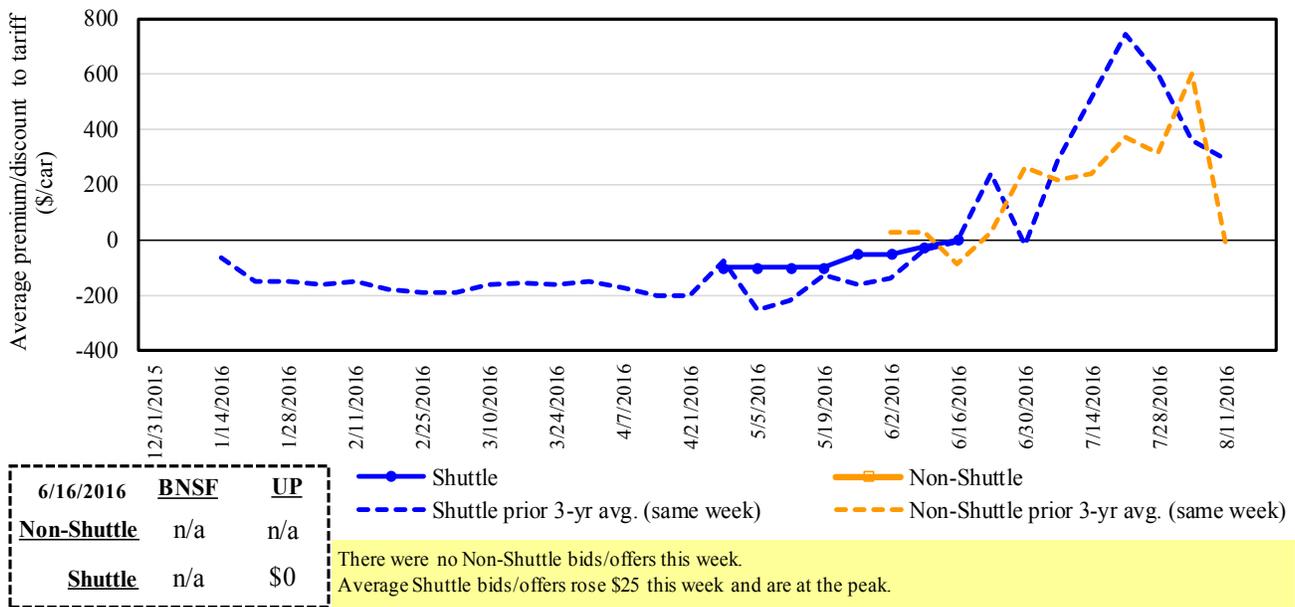
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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

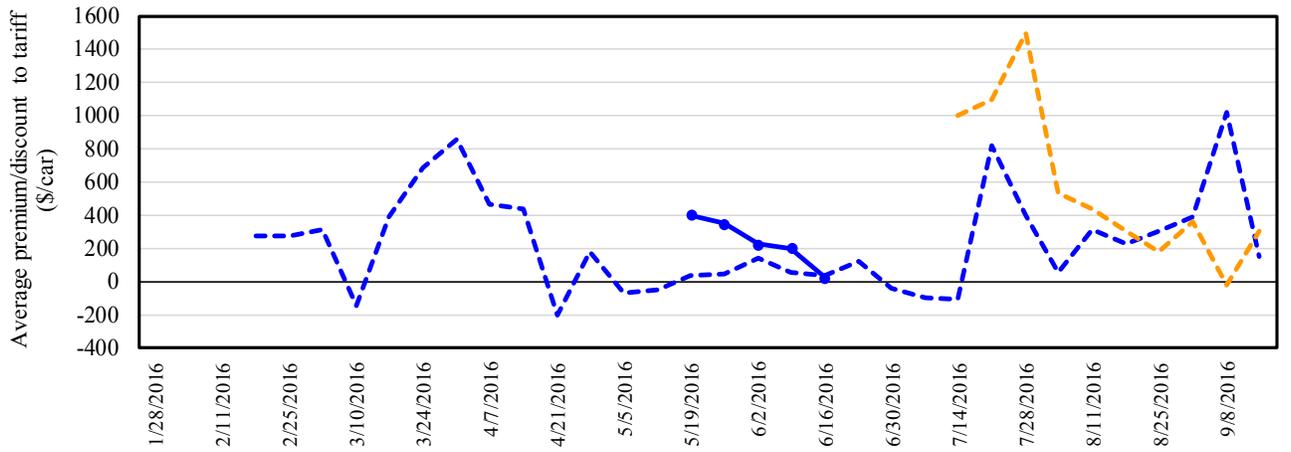
Figure 5
Bids/Offers for Railcars to be Delivered in August 2016, Secondary Market



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

Figure 6

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



6/16/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	\$0	\$50

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

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers fell \$175 this week and are \$375 below the peak.

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

Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending:		Delivery period					
		6/16/2016	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16
Non-shuttle	BNSF-GF	50	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	88	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(63)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(13)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	n/a	n/a	0	800	n/a	(50)
	Change from last week	n/a	n/a	(400)	0	n/a	(12)
	Change from same week 2015	n/a	n/a	(300)	0	n/a	n/a
	UP-Pool	(63)	0	50	500	n/a	n/a
	Change from last week	(13)	0	50	0	n/a	n/a
	Change from same week 2015	188	200	288	n/a	n/a	n/a

¹Average 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 Shipments¹

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
6/1/2016	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$0	\$35.80	\$0.97	-2	
	Grand Forks, ND	Duluth-Superior, MN	\$3,463	-\$24	\$34.15	\$0.93	-17	
	Wichita, KS	Los Angeles, CA	\$6,950	-\$122	\$67.80	\$1.85	-3	
	Wichita, KS	New Orleans, LA	\$4,243	\$0	\$42.14	\$1.15	-3	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$100	\$63.41	\$1.73	-3	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$0	\$44.80	\$1.22	-3	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$0	\$46.77	\$1.27	-4	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$0	\$36.55	\$0.93	6	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	9	
	Des Moines, IA	Davenport, IA	\$2,168	\$0	\$21.53	\$0.55	-1	
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$49.69	\$1.26	5	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	5	
Soybeans	Des Moines, IA	Little Rock, AR	\$3,444	\$0	\$34.20	\$0.87	1	
	Des Moines, IA	Los Angeles, CA	\$5,052	\$0	\$50.17	\$1.27	-1	
	Minneapolis, MN	New Orleans, LA	\$3,699	\$0	\$36.73	\$1.00	-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	\$0	\$43.64	\$1.19	7		
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,853	-\$70	\$37.56	\$1.02	-6	
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$55	\$37.90	\$1.03	-4	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	16	
	Grand Forks, ND	Portland, OR	\$5,511	-\$122	\$53.52	\$1.46	-6	
	Grand Forks, ND	Galveston-Houston, TX	\$5,831	-\$127	\$56.65	\$1.54	-14	
	Northwest KS	Portland, OR	\$5,478	\$0	\$54.40	\$1.48	-4	
Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$148	\$48.18	\$1.22	-9	
	Sioux Falls, SD	Tacoma, WA	\$4,960	-\$136	\$47.91	\$1.22	-8	
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$0	\$34.57	\$0.88	6	
	Lincoln, NE	Galveston-Houston, TX	\$3,600	-\$79	\$34.96	\$0.89	-5	
	Des Moines, IA	Amarillo, TX	\$3,795	\$0	\$37.69	\$0.96	0	
	Minneapolis, MN	Tacoma, WA	\$5,000	-\$147	\$48.19	\$1.22	-9	
	Council Bluffs, IA	Stockton, CA	\$4,640	-\$152	\$44.57	\$1.13	-6	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	-\$136	\$53.17	\$1.45	-8	
	Minneapolis, MN	Portland, OR	\$5,510	-\$148	\$53.25	\$1.45	-8	
	Fargo, ND	Tacoma, WA	\$5,380	-\$121	\$52.23	\$1.42	-8	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$0	\$43.94	\$1.20	-4	
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	10	
Grand Island, NE	Portland, OR	\$5,360	\$0	\$53.23	\$1.45	-4		

¹A 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.

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

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

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel surcharge per car ²	Tariff plus surcharge per:		Percent change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	-3
	OK	Cuautitlan, EM	\$6,514	\$0	\$66.55	\$1.81	-5
	KS	Guadalajara, JA	\$6,995	\$70	\$72.19	\$1.96	-4
	TX	Salinas Victoria, NL	\$4,142	\$0	\$42.32	\$1.15	-1
Corn	IA	Guadalajara, JA	\$8,137	\$49	\$83.64	\$2.12	-5
	SD	Celaya, GJ	\$7,480	\$0	\$76.43	\$1.94	-6
	NE	Queretaro, QA	\$7,879	\$0	\$80.50	\$2.04	0
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	6
	MO	Tlalnepantla, EM	\$7,238	\$0	\$73.96	\$1.88	0
	SD	Torreon, CU	\$7,080	\$0	\$72.34	\$1.84	-2
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$54	\$88.95	\$2.42	1
	NE	Guadalajara, JA	\$9,142	\$52	\$93.93	\$2.55	0
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	0
	KS	Torreon, CU	\$7,439	\$30	\$76.31	\$2.07	1
Sorghum	NE	Celaya, GJ	\$7,344	\$41	\$75.45	\$1.91	-3
	KS	Queretaro, QA	\$7,563	\$0	\$77.27	\$1.96	2
	NE	Salinas Victoria, NL	\$6,168	\$0	\$63.02	\$1.60	2
	NE	Torreon, CU	\$6,672	\$25	\$68.42	\$1.74	-2

¹Rates 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.

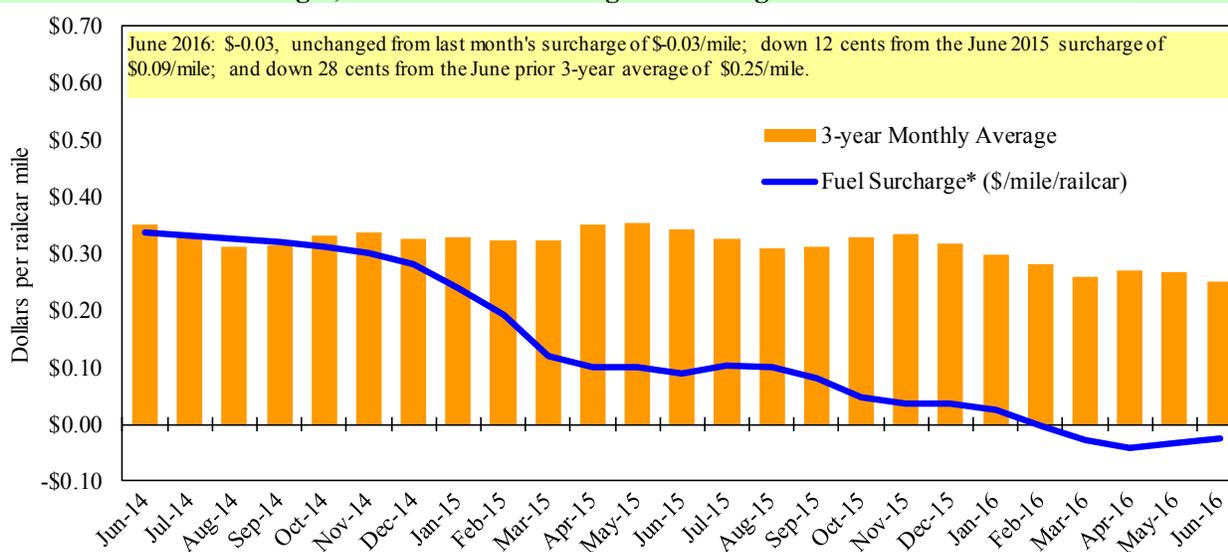
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage change calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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.

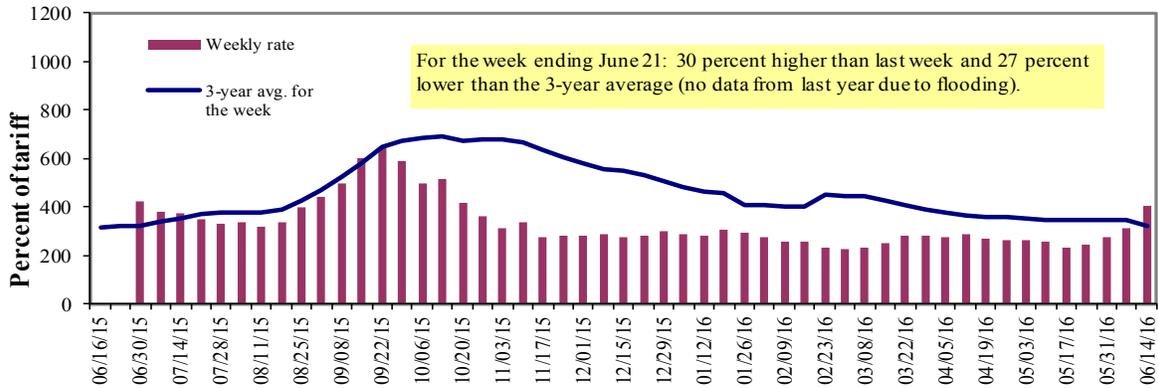
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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
Rate¹	6/21/2016	463	413	405	300	295	295	243
	6/14/2016	370	323	313	215	195	195	193
\$/ton	6/21/2016	28.66	21.97	18.79	11.97	13.84	11.92	7.63
	6/14/2016	22.90	17.18	14.52	8.58	9.15	7.88	6.06
Current week % change from the same week:								
	Last year	-14	-10	n/a	-16	-16	-16	-11
	3-year avg. ²	10	13	27	18	24	24	14
Rate¹	July	475	430	425	358	325	325	248
	September	563	538	563	470	543	543	455

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds;

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

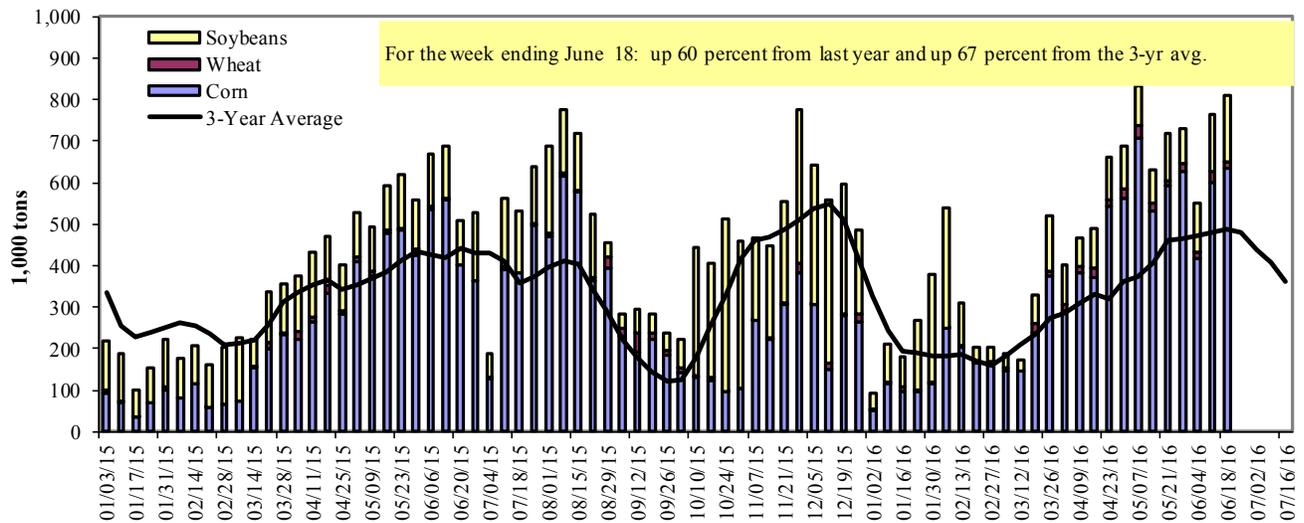
(Rate * 1976 tariff benchmark rate per ton)/100

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 River¹ (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 6/18/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	266	5	103	16	390
Winfield, MO (L25)	411	8	115	0	534
Alton, IL (L26)	637	11	169	0	817
Granite City, IL (L27)	634	16	161	2	813
Illinois River (L8)	200	3	40	0	242
Ohio River (L52)	18	0	16	0	33
Arkansas River (L1)	1	28	11	3	43
Weekly total - 2016	653	44	188	4	889
Weekly total - 2015	525	11	141	0	676
2016 YTD ¹	10,941	861	4,777	146	16,724
2015 YTD	9,864	609	5,024	107	15,604
2016 as % of 2015 YTD	111	141	95	136	107
Last 4 weeks as % of 2015 ²	102	311	106	178	107
Total 2015	19,215	1,686	14,191	359	35,451

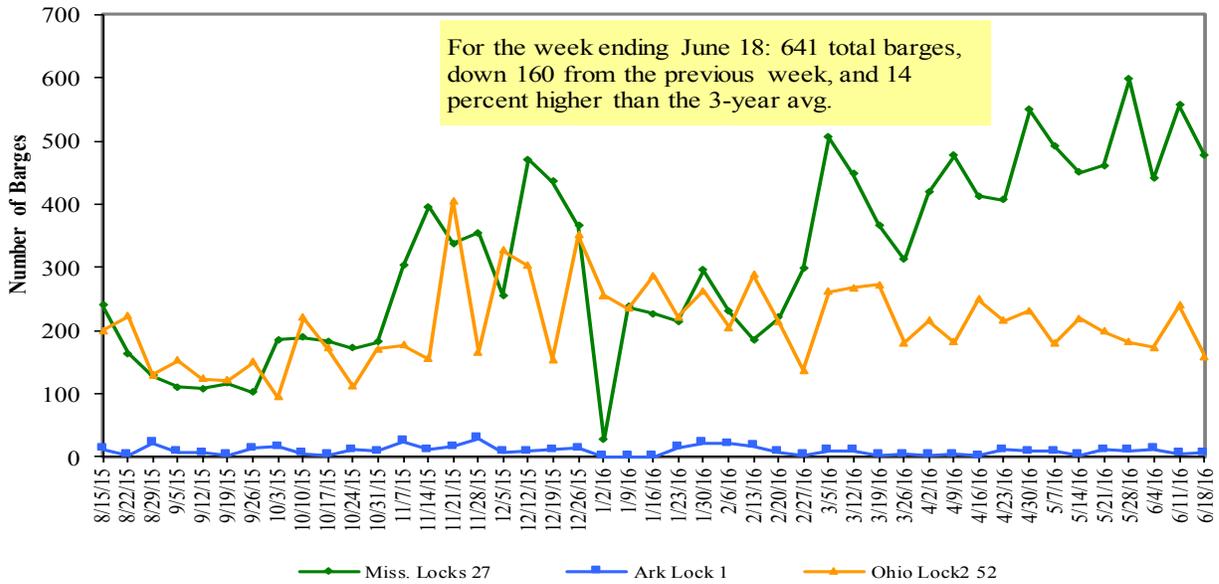
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

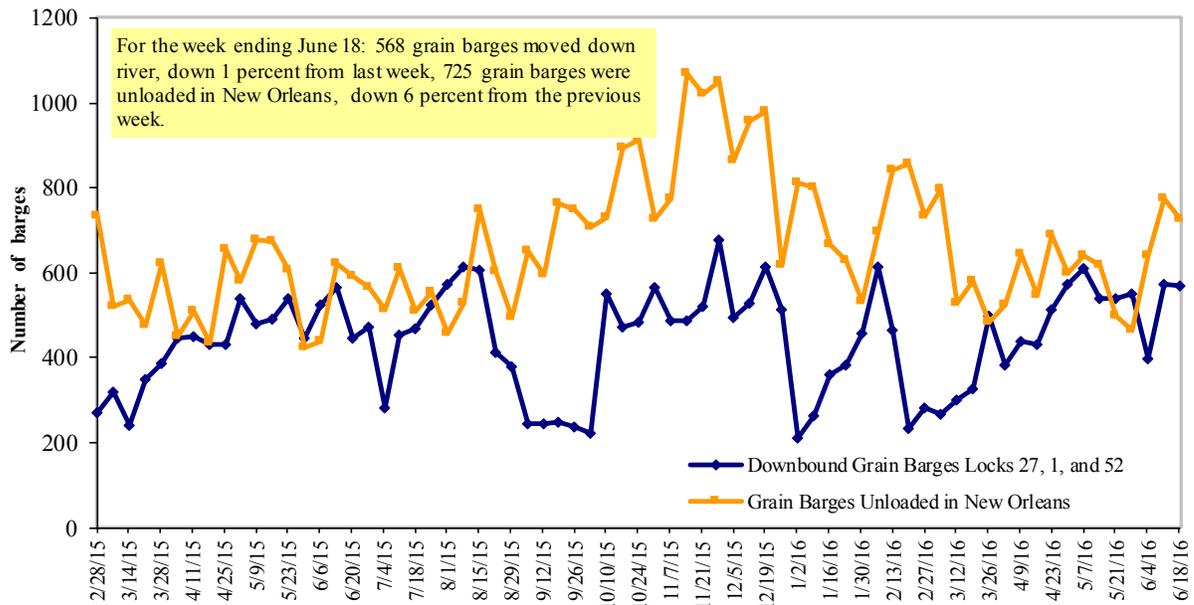
Source: U.S. Army Corps of Engineers

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 Prices¹, Week Ending 06/20/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.443	-0.006	-0.516
	New England	2.494	0.002	-0.591
	Central Atlantic	2.542	0.005	-0.560
	Lower Atlantic	2.358	-0.014	-0.466
II	Midwest ²	2.386	-0.004	-0.360
III	Gulf Coast ³	2.296	-0.011	-0.459
IV	Rocky Mountain	2.413	0.000	-0.386
V	West Coast	2.706	-0.005	-0.391
	West Coast less California	2.606	-0.004	-0.401
	California	2.786	-0.005	-0.384
Total	U.S.	2.426	-0.005	-0.433

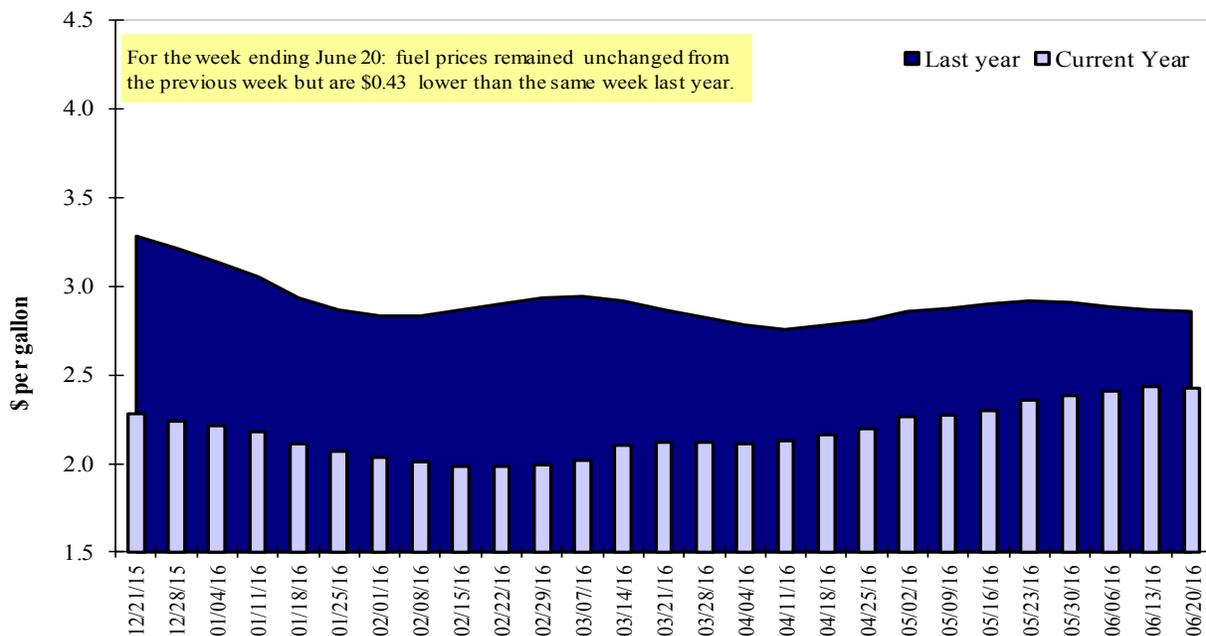
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same 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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
6/9/2016	1,981	674	2,148	1,102	149	6,055	14,078	6,017	26,150
This week year ago	1,350	951	1,334	841	196	4,671	10,519	3,178	18,367
Cumulative exports-marketing year²									
2015/16 YTD	216	64	120	70	3	472	31,466	43,253	75,191
2014/15 YTD	175	54	83	59	6	377	34,065	47,192	81,634
YTD 2015/16 as % of 2014/15	124	117	144	118	53	125	92	92	92
Last 4 wks as % of same period 2014/15	88	42	104	87	47	81	135	162	126
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 Importers¹ of U.S. Corn

For the week ending 6/9/2016	Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2012-2014
	2016/17	2015/16	2014/15		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	681	9,776	10,633	(8)	9,244
Mexico	1,678	12,110	10,321	17	7,448
Korea	0	2,259	3,292	(31)	2,630
Colombia	62	4,427	3,992	11	1,727 #
Taiwan	84	1,824	1,902	(4)	1,224
Top 5 Importers	2,504	30,395	30,140	1	22,273
Total US corn export sales	3,957	45,543	44,583	2	34,445
% of Projected	8%	98%	94%		
Change from prior week	179	910	627		
Top 5 importers' share of U.S. corn export sales	63%	67%	68%		65%
USDA forecast, June 2016	48,346	46,438	47,430	(2)	
Corn Use for Ethanol USDA forecast, June 2016	134,620	133,350	132,080	1	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

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

Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>

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

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 6/9/2016	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2012-2014
	2016/17	2015/16	2014/15		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	2,313	27,579	30,109	(8)	24,211
Mexico	643	3,217	3,265	(1)	2,971
Indonesia	20	1,757	1,701	3	1,895
Japan	138	2,156	2,014	7	1,750
Taiwan	103	1,234	1,257	(2)	1,055
Top 5 importers	3,217	35,943	38,346	(6)	31,882
Total US soybean export sales	5,553	49,270	50,370	(2)	39,169
% of Projected	11%	103%	100%		
Change from prior week	769	817	133		
Top 5 importers' share of U.S. soybean export sales	58%	73%	76%		81%
USDA forecast, June 2016	51,771	47,956	50,218	(5)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. Total commitments change from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 6/9/2016	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2013-2015
	2016/17	2015/16		
	Current MY	Last MY		
		- 1,000 mt -		- 1,000 mt -
Japan	374	43	772	2,743
Mexico	662	450	47	2,660
Nigeria	266	554	(52)	1,978
Philippines	555	346	60	2,156
Brazil	142	143	(1)	2,273
Korea	335	377	(11)	1,156
Taiwan	149	188	(21)	923
Indonesia	25	46	(45)	790
Colombia	113	104	8	664
Thailand	167	84	99	685
Top 10 importers	2,620	2,252	16	16,028
Total US wheat export sales	6,527	5,047	29	24,059
% of Projected	27%	24%		
Change from prior week	763	316		
Top 10 importers' share of U.S. wheat export sales	40%	45%		67%
USDA forecast, June 2016	24,523	21,117	16	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative 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 sales³FAS 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 06/16/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of:		2015 Total*
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	380	251	151	5,669	5,265	108	156	132	10,985
Corn	255	328	78	4,376	4,607	95	123	165	7,232
Soybeans	0	0	n/a	4,425	4,054	109	0	0	11,809
Total	635	579	110	14,470	13,926	104	137	146	30,027
Mississippi Gulf									
Wheat	42	60	70	1,638	1,904	86	102	63	4,504
Corn	767	1,098	70	14,282	14,269	100	120	151	26,701
Soybeans	260	69	378	9,680	10,434	93	105	144	29,593
Total	1,069	1,226	87	25,600	26,608	96	117	137	60,797
Texas Gulf									
Wheat	139	102	136	1,515	1,927	79	142	81	3,724
Corn	34	29	121	440	269	164	153	210	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
Total	173	131	133	2,047	2,406	85	144	89	5,184
Interior									
Wheat	21	16	134	588	619	95	84	103	1,388
Corn	135	181	75	3,221	2,857	113	114	149	6,201
Soybeans	60	81	74	1,787	1,676	107	126	160	3,518
Total	216	278	78	5,595	5,151	109	113	146	11,106
Great Lakes									
Wheat	20	0	n/a	192	240	80	119	83	997
Corn	21	41	50	126	137	92	306	917	485
Soybeans	0	0	n/a	23	66	35	n/a	0	733
Total	40	41	98	341	443	77	183	149	2,216
Atlantic									
Wheat	0	0	n/a	182	295	62	2	2	520
Corn	0	0	n/a	14	73	19	0	0	277
Soybeans	12	7	157	880	935	94	142	189	2,053
Total	12	8	149	1,076	1,303	83	41	35	2,850
U.S. total from ports**									
Wheat	602	429	140	9,783	10,250	95	133	98	22,118
Corn	1,212	1,676	72	22,458	22,212	101	122	155	41,492
Soybeans	331	157	211	16,887	17,375	97	110	145	48,570
Total	2,145	2,262	95	49,128	49,837	99	123	133	112,180

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

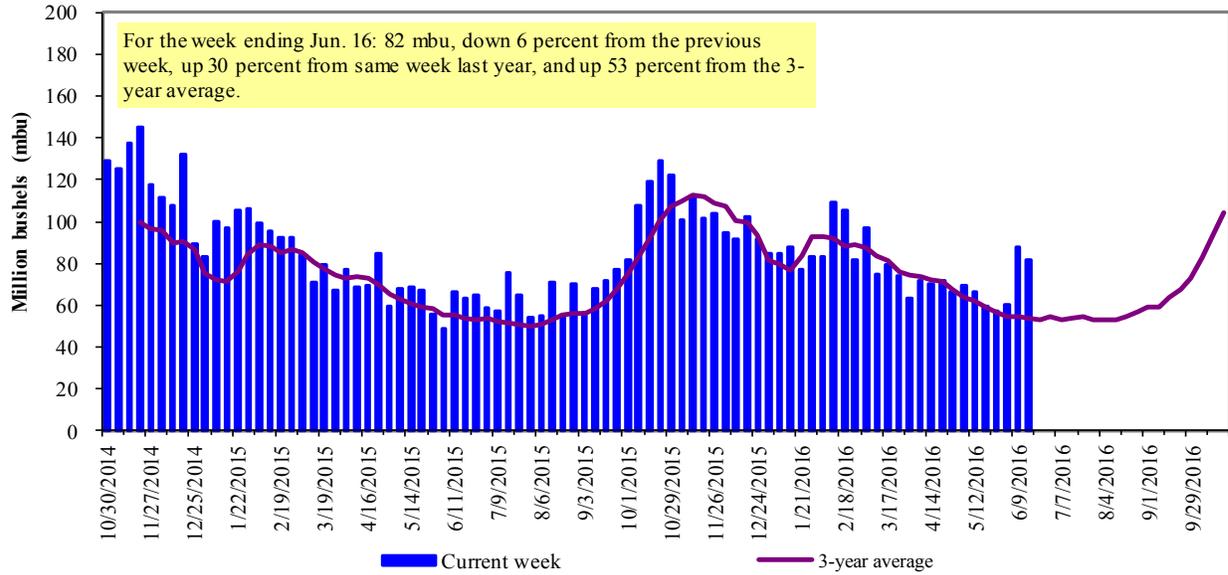
**Total only includes regions shown above

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

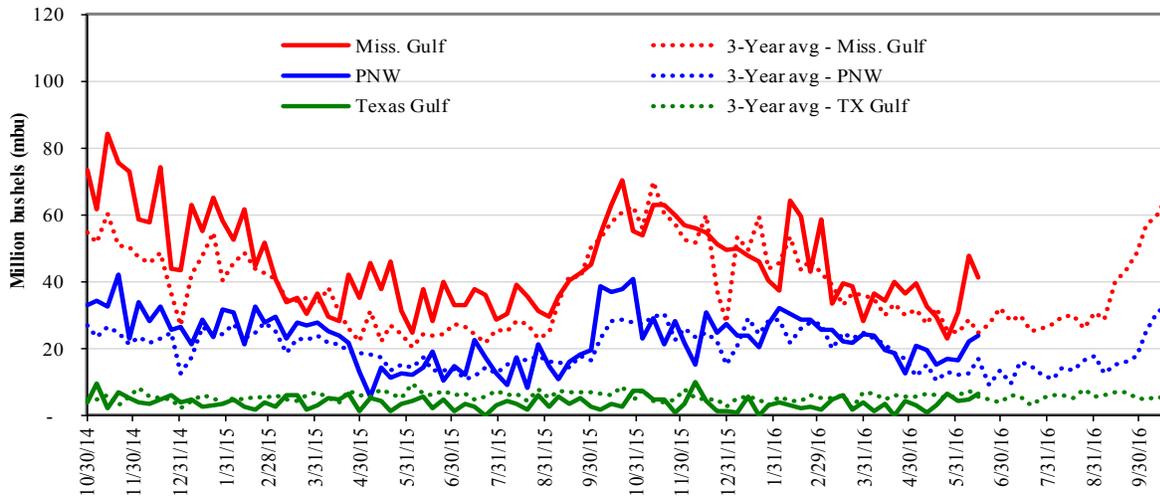
U.S. grain inspected for export (wheat, corn, and soybeans)



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 PNW¹ (wheat, corn, and soybeans)



Week ending 06/16/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	41.3	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	24.0	Last Year (same week):	down 14	up 33	down 10	up 8
Texas Gulf:	6.5	3-yr avg. (4-wk. mov. Avg):	up 46	up 201	up 57	up 26
			up 60	up 5	up 49	up 77

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

Ocean Transportation

Table 17

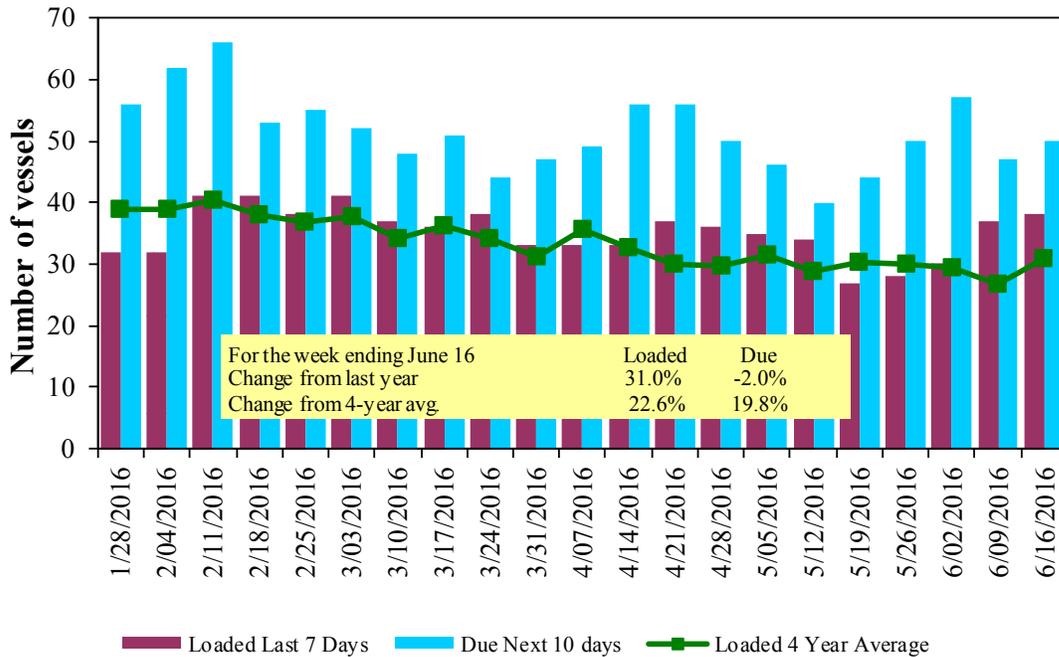
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
6/16/2016	32	38	50	12	n/a
6/9/2016	26	37	47	12	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

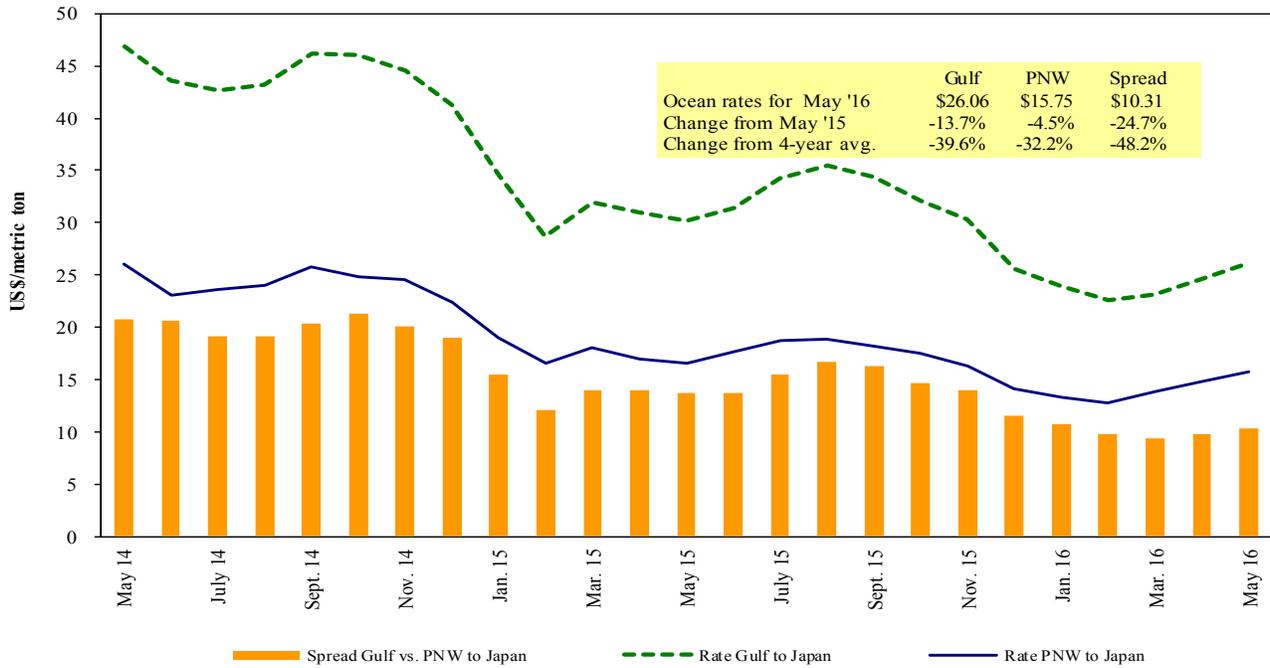
U.S. Gulf^d Vessel Loading Activity



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 06/18/2016

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

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

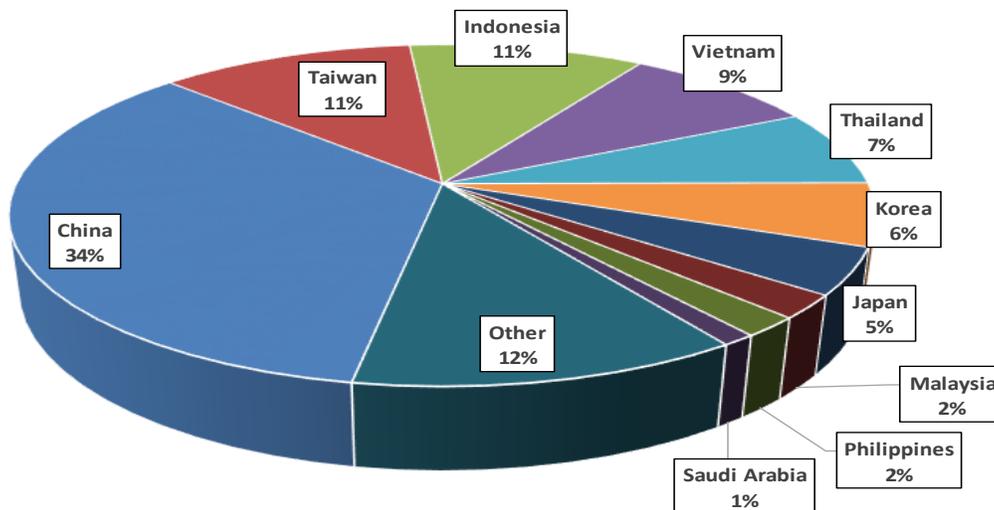
¹ 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

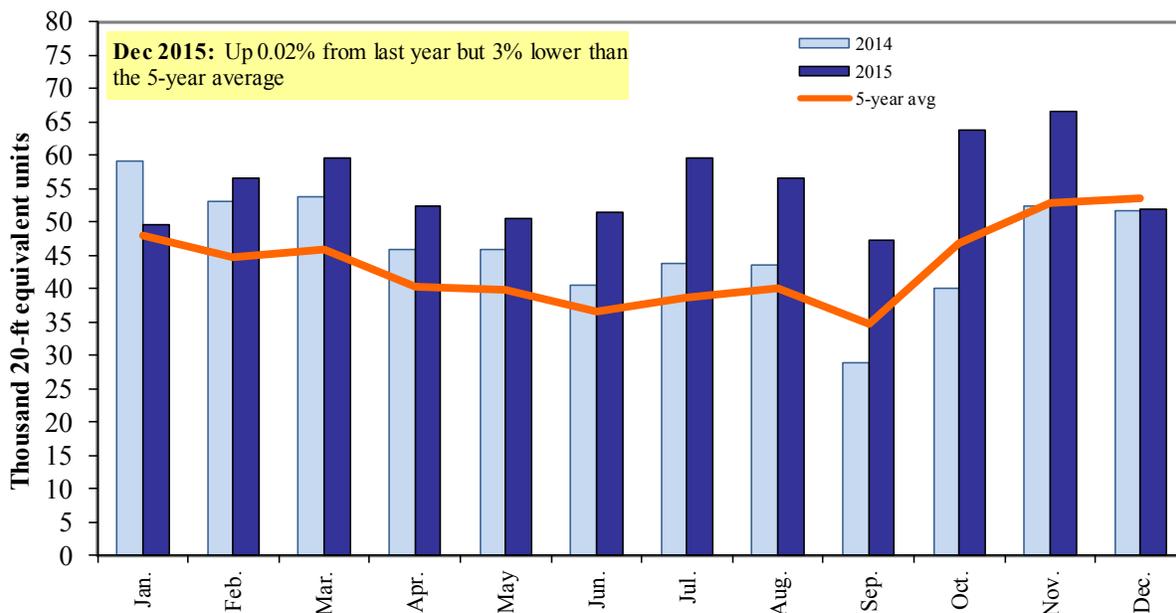


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

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