



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service  
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## WEEKLY HIGHLIGHTS

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### Gulf Vessel Loading Activity Getting Stronger As Ocean Freight Rates Remain Low

Grain vessel loading activity in the U.S. Gulf continues to get stronger while bulk ocean freight rates continue to remain low. During the past 6 weeks and as of the week ending September 10, an average of 41 ocean-going grain vessels were loaded per week. An average of 58 vessels are expected to be loaded within the next 10 days. During the prior 6 weeks and as of the week ending July 30, an average of 31 vessels were loaded per week. An average of 48 vessels are expected to be loaded within the next 10 days. Meanwhile, as of the week ending September 11, ocean freight for shipping bulk grain from the U.S. Gulf to Japan was \$34.50 per metric ton, unchanged from the same level 6 weeks ago.

### Weekly Crop Harvest Pace Increases...

Though still early for some of the major grain producing States, the harvest is well underway in the southern States. As of September 13, the National Agricultural Statistics Service reports that Louisiana, Georgia, Mississippi, and South Carolina are all 90 percent or more complete with their corn harvest. Louisiana and Mississippi lead in soybean harvest progress with 57 and 34 percent harvested, respectively. Currently, the pace of corn harvest progress is behind in several States compared to the 5-year average, most notably Oklahoma (31 percent behind), Tennessee (29 percent behind), and Kentucky and Kansas (both 14 percent behind). Overall, the national corn harvest is 4 percent complete, lower than 5-year average of 9 percent.

### ...Causing a Continuing Increase in Barge Rates

As of September 15, spot barge rates for export grain have increased for 4 weeks at various locations with the new harvest seasonal demand for barge services. As of September 15, the St. Louis spot barge rate for export grain was 450 percent of tariff (\$17.96 per short ton), but 15 percent below the 5-year average. Barge operators report that the barge supply is adequate for now, but may be stretched as low water and delays due to repairs may limit the barge supply to certain areas. Low water has caused some delays with groundings and a narrowing of the channel, especially on some sections of the lower Mississippi River. In addition, repair work at Ohio River Locks 52, near Brookport, IL, has caused multiple-day delays at that site.

## Snapshots by Sector

### Export Sales

During the week ending September 3, **unshipped balances** of wheat, corn, and soybeans totaled 30 mmt, down 27 percent from the same time last year. Net weekly **wheat export sales** of 0.290 mmt were up 4 percent from the prior week. Net **corn export sales** were up from the prior week, and net **soybean export sales** were notably up from the past week.

### Rail

U.S. Class I railroads originated 18,780 **carloads of grain** during the week ending September 5, up 3 percent from last week, up 10 percent from last year, and up 9 percent from the 3-year average.

During the week ending September 10, average September shuttle **secondary railcar bids/offers per car** were \$129 below tariff, up \$24 from last week, and \$3,129 lower than last year. Non-shuttle secondary railcar bids/offers were \$116 below tariff and up \$4 from last week. There were no non-shuttle railcar bids/offers for September in this week of last year.

### Barge

During the week ending September 12, **barge grain movements** totaled 377,034 tons, down 4 percent from last week, and up 52 percent from the same period last year.

During the week ending September 12, 246 grain barges **moved down river**, about same as last week; 597 grain barges were **unloaded in New Orleans**, down 8 percent from the previous week.

### Ocean

During the week ending September 10, 35 **ocean-going grain vessels** were loaded in the Gulf, 3 percent less than the same period last year. Sixty-two vessels are expected to be loaded within the next 10 days, unchanged from the same period last year.

During the week ending September 11, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$34.50 per metric ton (mt), down 4 percent from the previous week. The cost of shipping from the PNW to Japan was \$18 per mt, down 5 percent from the previous week.

### Fuel

During the week ending September 14, U.S. average **diesel fuel prices** decreased 2 cents from the previous week to \$2.52 per gallon—down \$1.28 from the same week last year.

## Containerized Grain Update—January-June, 2015

During the first six months of 2015, U.S. containerized grain exports were lower than recent levels due to significant disruptions and stiff competition.

### Lower Export Volumes

Overall containerized grain shipments in the first half of the year are 21 percent lower than the 3-year average and 24 percent lower than volumes in 2014 (see Table 1). The grain export industry faced three significant obstacles during this period that resulted in the lower volumes: the Chinese ban on imports of U.S. distiller's grains (DDGs); logistical disruptions as a result of the West Coast labor contract negotiations; and stiff competition from historically low bulk ocean freight rates.

Commodity	2015	2014	%change	3-Year Average	% change
	metric tons				
Distillers grains	1,454,819	2,037,444	-29%	1,699,212	-14%
Soybeans	844,910	1,287,415	-34%	1,304,472	-35%
Animal feed	421,462	415,438	1%	492,140	-14%
Corn	261,040	281,827	-7%	329,394	-21%
Soybean flour and meal	192,635	161,818	19%	210,989	-9%
Other	217,166	255,633	-15%	272,524	-20%
<b>Total</b>	<b>3,392,032</b>	<b>4,439,576</b>	<b>-24%</b>	<b>4,308,731</b>	<b>-21%</b>

Source: Port Import Export Reporting Service (PIERS)

### Distillers Grains

For the past several years, the top containerized grain export commodity was distillers grains (DDGs) (see Table 1). The Chinese import ban on certain U.S. DDGs exports in 2014 caused containerized shipments of this important export category to fall significantly during the first 6 months of 2015, dropping 29 percent from 2014 and 14 percent from the 3-year average. According to the Global Agricultural Trade System of USDA's Foreign Agricultural Service, bulk and containerized exports of DDGs fell 46 percent in January and February compared with the previous year. By April, shipments were improving, up 32 percent in April and 51 percent in May. However, containerized shipments of DDGs did not see as large of an increase as bulk. Container shipments of DDGs increased 25 percent in April, but only 4 percent in May and 6 percent in June. Bulk shipments increased 32 percent in April and 111 percent in May.

### Resolution of Labor Agreement

The 25 percent increase in container movements of DDGs in April was likely a result of the final resolution of the West Coast Labor Contract, which ended in mid-February. The nearly 9 months of negotiations caused significant backlogs for containerized cargo moving through all major West Coast ports. The delays caused cargo to be rerouted and some perishable products to spoil on the terminal and cost the industry thousands of dollars per container. The majority (73 percent) of U.S. waterborne containerized grain exports use the West Coast ports to access the Asian markets where more than 95 percent of U.S. containerized grain exports are destined. Once both sides agreed to a new contract, working through the backlog of cargo took until mid-April or longer. These disruptions did not impact bulk grain ports on the West Coast, allowing bulk grains to move freely during this period.

### Low Bulk Rates

In contrast to the labor disruptions and the Chinese ban on DDGs, exporters of containerized grain have enjoyed the benefits of relatively low ocean freight rates. In general over the past couple of years, both container and bulk ocean rates have been quite low, offering those grain exporters with the ability to ship with either mode competitive ocean transportation options. However, historically low bulk rates have likely caused containerized shipments to drop somewhat as exporters with both capabilities could take advantage of the cheaper bulk alternative.

U.S. bulk vessel rates have fallen significantly over the past year relative to container rates. As of July, bulk rates for various routes averaged \$21.21 per metric ton, up slightly from the first six months of the year, but down 20 percent from July 2014. In 2015, the year-to-date average rates were down 33 percent from the same period in 2014.

Container rates for various routes and sizes averaged \$806.25, down 6 percent from the first 6 months of the year, but only down 5 percent from July 2014. The year-to-date average rates in 2015 were down only 5 percent from the same period in 2014.

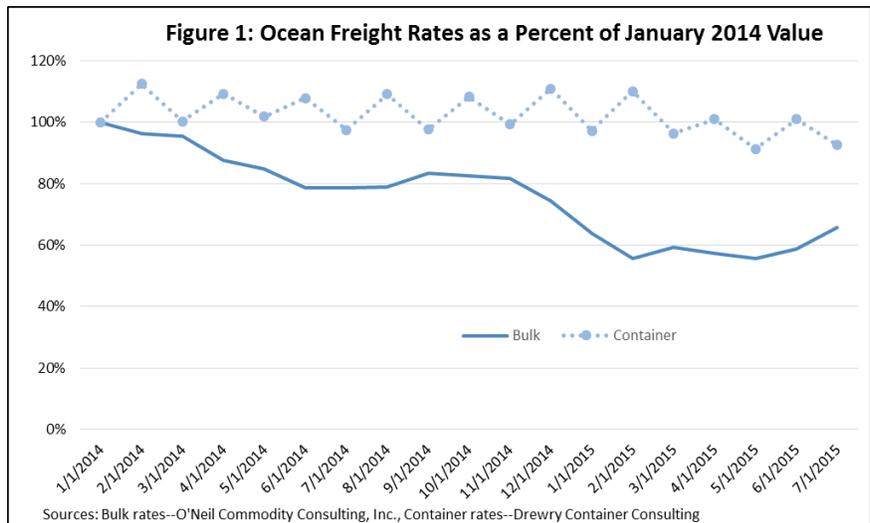


Figure 1 shows that year-to-date bulk rates in 2015 are significantly lower than the rates experienced in January 2014. Bulk rates are currently hovering at about 60 percent of the rates shown in January 2014, while container rates in 2015 are still about 95 percent of the level in January 2014. ([April.Taylor@ams.usda.gov](mailto:April.Taylor@ams.usda.gov) and [Jesse.Gastelle@ams.usda.gov](mailto:Jesse.Gastelle@ams.usda.gov))

# Grain Transportation Indicators

Table 1

## Grain Transport Cost Indicators<sup>1</sup>

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
09/16/15	169	243	205	278	154	128
09/09/15	170	243	204	246	161	135

<sup>1</sup>Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

Commodity	Origin--Destination	9/11/2015	9/4/2015
Corn	IL--Gulf	-0.73	-0.67
Corn	NE--Gulf	-0.81	-0.77
Soybean	IA--Gulf	-1.31	-1.06
HRW	KS--Gulf	-1.52	-1.64
HRS	ND--Portland	-2.08	-2.10

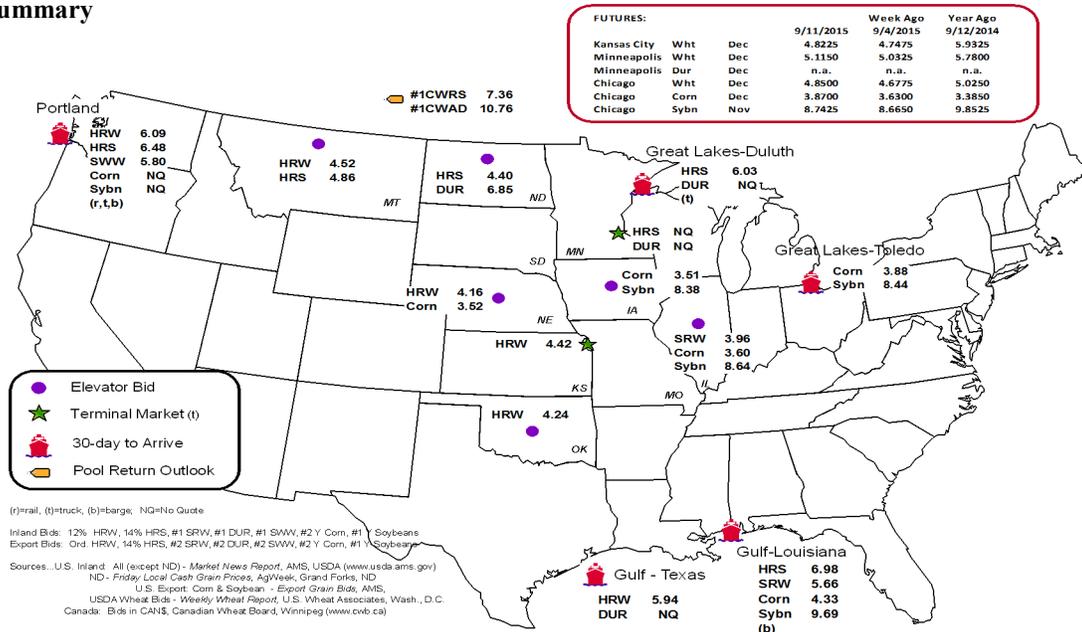
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1

## Grain bid Summary



# Rail Transportation

Table 3

## Rail Deliveries to Port (carloads)<sup>1</sup>

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
9/9/2015 <sup>p</sup>	3	444	2,518	188	3,153	9/5/2015	1,462
9/2/2015 <sup>r</sup>	14	641	2,245	150	3,050	8/29/2015	1,921
2015 YTD <sup>f</sup>	12,873	41,234	141,886	15,220	211,213	2015 YTD	64,258
2014 YTD <sup>f</sup>	21,747	58,660	158,568	18,177	257,152	2014 YTD	67,938
2015 YTD as % of 2014 YTD	59	70	89	84	82	% change YTD	95
Last 4 weeks as % of 2014 <sup>2</sup>	24	48	66	54	59	Last 4wks % 2014	93
Last 4 year weeks as % of 4-year avg. <sup>2</sup>	45	54	84	111	75	Last 4wks % 4 yr	121
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

<sup>1</sup> Data is incomplete as it is voluntarily provided

<sup>2</sup> Compared with same 4-weeks in 2013 and prior 4-year average.

<sup>3</sup> Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Ferromex.

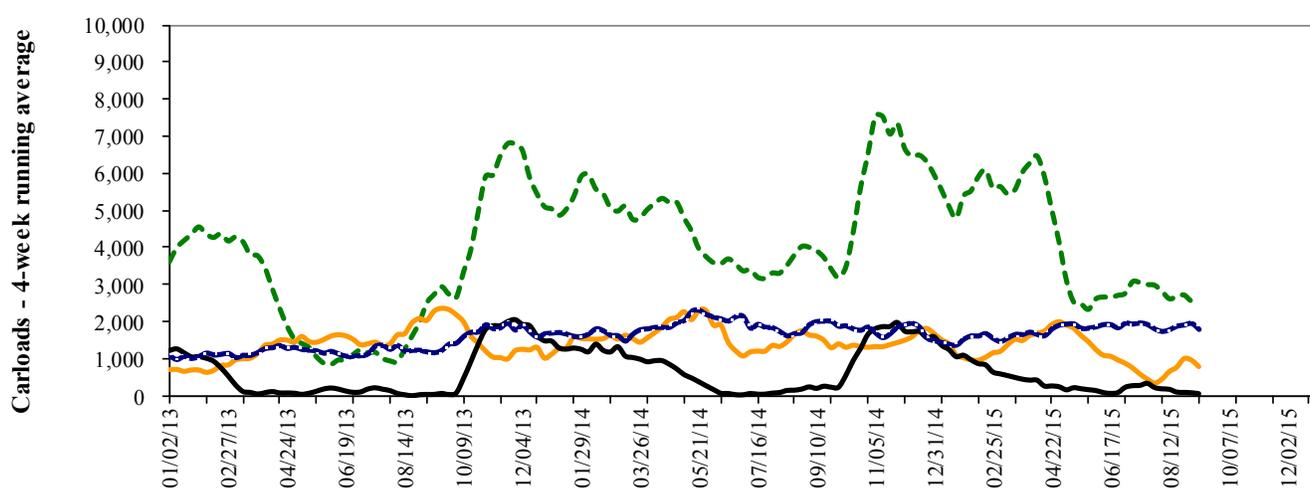
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail Deliveries to Port



--- Pacific Northwest: 4 wks. ending 9/9--down 34% from same period last year; down 16% from 4-year average  
--- Texas Gulf: 4 wks ending 9/9, down 52% from same period last year; down 46% from 4-year average  
--- Miss. River: 4 wks. ending 9/9--down 76% from same period last year; down 55% from 4-year average  
--- Cross-border: 4 wks. ending 9/5-- down 7% from same period last year; up 21% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

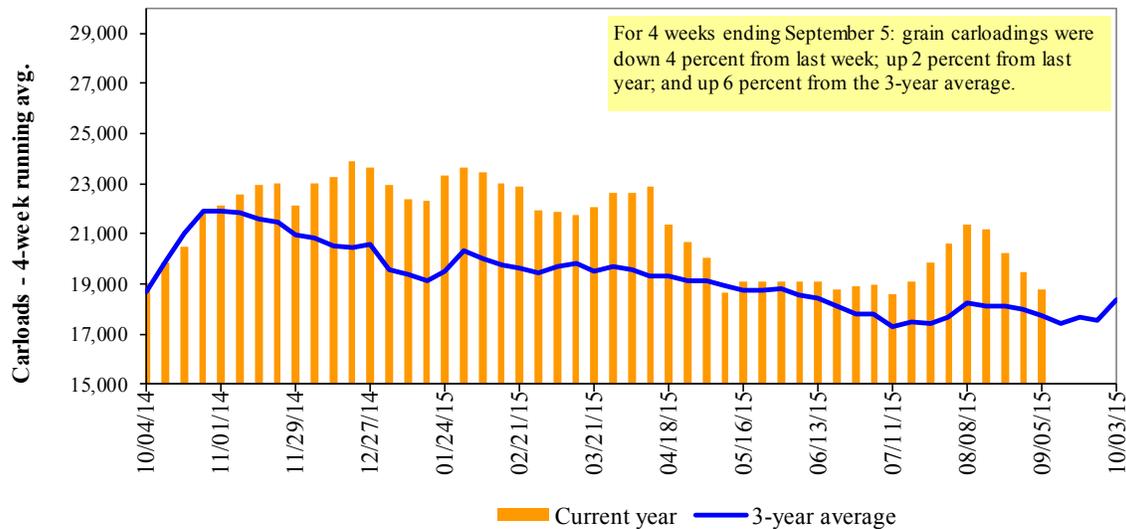
Table 4

**Class I Rail Carrier Grain Car Bulletin (grain carloads originated)**

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
09/05/15	1,184	2,404	9,649	1,028	4,515	18,780	2,988	4,386
This week last year	1,033	1,785	9,095	699	4,506	17,118	3,819	4,880
2015 YTD	69,307	101,987	343,568	30,387	178,208	723,457	139,882	156,256
2014 YTD	63,844	100,396	305,353	29,325	196,642	695,560	155,226	185,612
2015 YTD as % of 2014 YTD	109	102	113	104	91	104	90	84
Last 4 weeks as % of 2014 <sup>1</sup>	94	103	109	106	93	102	73	86
Last 4 weeks as % of 3-yr avg. <sup>2</sup>	124	113	103	112	109	107	86	92
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

<sup>1</sup>The past 4 weeks of this year as a percent of the same 4 weeks last year.

<sup>2</sup>The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

**Figure 3****Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

**Railcar Auction Offerings<sup>1</sup> (\$/car)<sup>2</sup>**

Week ending	Delivery period							
	Sep-15	Sep-14	Oct-15	Oct-14	Nov-15	Nov-14	Dec-15	Dec-14
BNSF <sup>3</sup>								
COT grain units	no bids	no offer	no bids	no offer	no bids	no offer	no bids	no offer
COT grain single-car <sup>5</sup>	no offer	no offer	2	no offer	0	no offer	0 . . 1	no offer
UP <sup>4</sup>								
GCAS/Region 1	no bids	no offer	no bids	1001	no bids	454	n/a	n/a
GCAS/Region 2	10	no offer	no bids	1327	no bids	727	n/a	n/a

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

<sup>2</sup>Average premium/discount to tariff, last auction

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

<sup>4</sup>UP - GCAS = Grain Car Allocation System

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

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

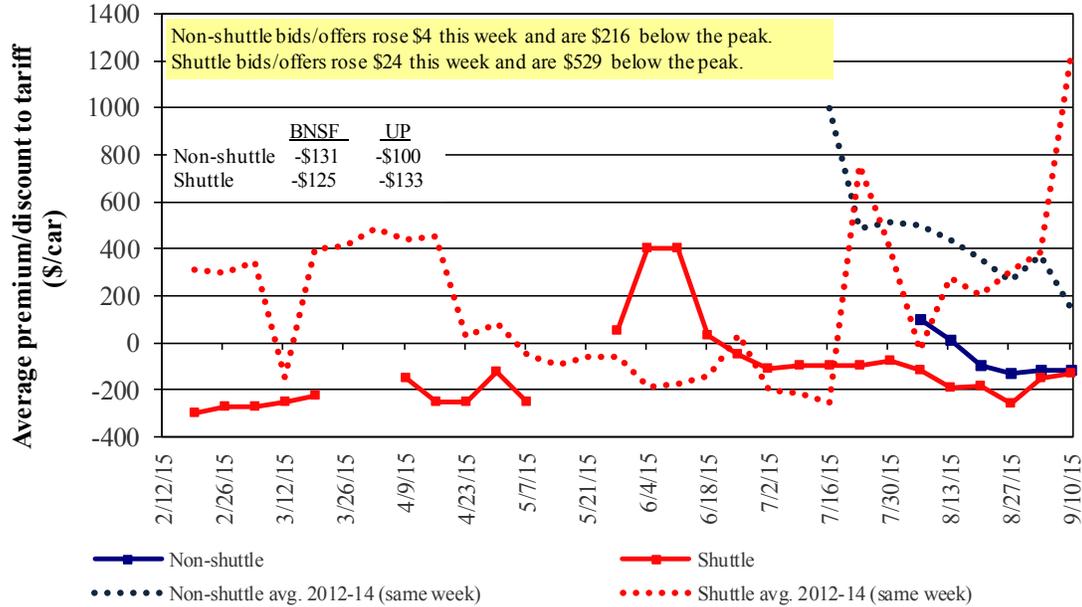
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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

Figure 4

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

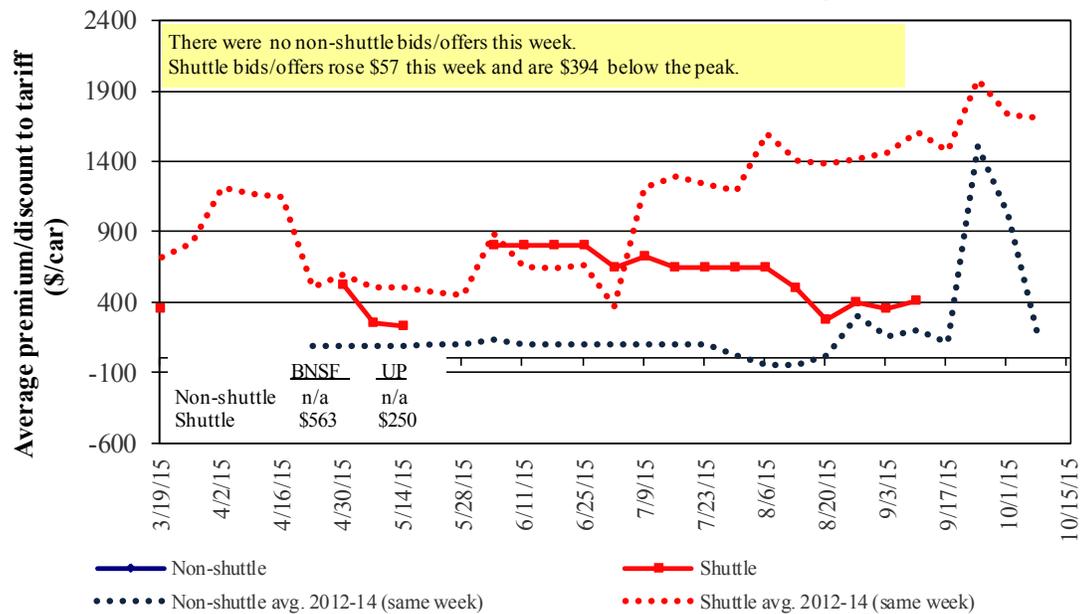


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

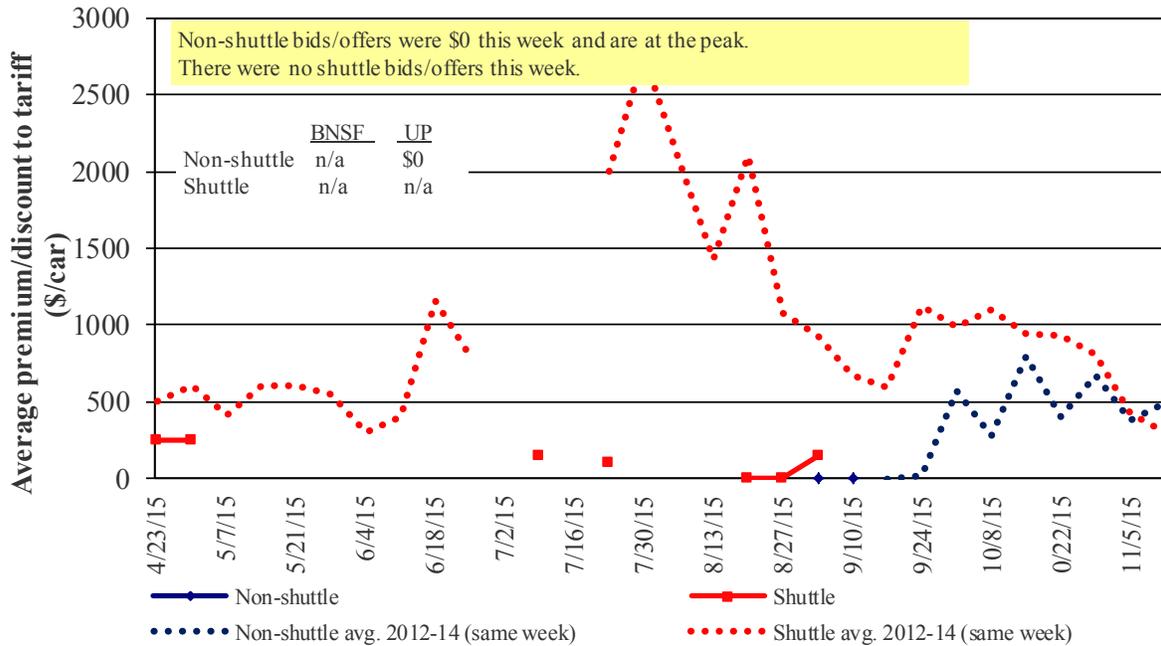


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

**Weekly Secondary Railcar Market (\$/car)<sup>1</sup>**

Week ending	Delivery period					
	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16
<b>Non-shuttle</b>						
BNSF-GF	(131)	n/a	n/a	n/a	n/a	n/a
Change from last week	7	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(100)	n/a	-	n/a	n/a	n/a
Change from last week	-	n/a	-	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(125)	563	n/a	(200)	n/a	n/a
Change from last week	(37)	63	n/a	-	n/a	n/a
Change from same week 2014	(3,125)	(3,437)	n/a	n/a	n/a	n/a
UP-Pool	(133)	250	n/a	n/a	n/a	n/a
Change from last week	84	50	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	(3,000)	n/a	n/a	n/a	n/a

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

<sup>2</sup>Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

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

Table 7

**Tariff Rail Rates for Unit and Shuttle Train Shipments<sup>1</sup>**

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>3</sup>
9/1/2015	metric ton					bushe <sup>l</sup> <sup>2</sup>		
<b>Unit train</b>								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$71	\$36.50	\$0.99	3	
	Grand Forks, ND	Duluth-Superior, MN	\$3,563	\$24	\$35.62	\$0.97	-3	
	Wichita, KS	Los Angeles, CA	\$6,950	\$122	\$70.23	\$1.91	4	
	Wichita, KS	New Orleans, LA	\$4,243	\$125	\$43.37	\$1.18	0	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	\$100	\$65.41	\$1.78	5	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$137	\$46.15	\$1.26	0	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$190	\$48.66	\$1.32	-2	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,328	\$141	\$34.45	\$0.88	-2	
	Toledo, OH	Raleigh, NC	\$5,555	\$0	\$55.16	\$1.40	9	
	Des Moines, IA	Davenport, IA	\$2,168	\$30	\$21.83	\$0.55	2	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$0	\$47.28	\$1.20	9	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$0	\$40.75	\$1.04	12	
	Des Moines, IA	Little Rock, AR	\$3,308	\$88	\$33.72	\$0.86	-1	
Soybeans	Des Moines, IA	Los Angeles, CA	\$4,852	\$255	\$50.72	\$1.29	-13	
	Minneapolis, MN	New Orleans, LA	\$3,844	\$127	\$39.43	\$1.07	0	
	Toledo, OH	Huntsville, AL	\$4,676	\$0	\$46.43	\$1.26	17	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$0	\$55.86	\$1.52	9	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$0	\$43.38	\$1.18	22	
Champaign-Urbana, IL	New Orleans, LA	\$3,974	\$141	\$40.86	\$1.11	0		
<b>Shuttle Train</b>								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$70	\$39.95	\$1.09	1	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$55	\$39.46	\$1.07	7	
	Chicago, IL	Albany, NY	\$4,723	\$0	\$46.90	\$1.28	9	
	Grand Forks, ND	Portland, OR	\$5,611	\$122	\$56.93	\$1.55	1	
	Grand Forks, ND	Galveston-Houston, TX	\$6,532	\$127	\$66.12	\$1.80	0	
	Northwest KS	Portland, OR	\$5,478	\$224	\$56.62	\$1.54	-2	
	Minneapolis, MN	Portland, OR	\$5,180	\$148	\$52.91	\$1.34	-6	
Corn	Sioux Falls, SD	Tacoma, WA	\$5,130	\$136	\$52.29	\$1.33	-5	
	Champaign-Urbana, IL	New Orleans, LA	\$3,147	\$141	\$32.65	\$0.83	-3	
	Lincoln, NE	Galveston-Houston, TX	\$3,610	\$79	\$36.63	\$0.93	-4	
	Des Moines, IA	Amarillo, TX	\$3,645	\$110	\$37.29	\$0.95	-3	
	Minneapolis, MN	Tacoma, WA	\$5,180	\$147	\$52.90	\$1.34	-6	
	Council Bluffs, IA	Stockton, CA	\$4,600	\$152	\$47.19	\$1.20	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,690	\$136	\$57.85	\$1.57	-5	
Soybeans	Minneapolis, MN	Portland, OR	\$5,710	\$148	\$58.17	\$1.58	-5	
	Fargo, ND	Tacoma, WA	\$5,580	\$121	\$56.61	\$1.54	-4	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$162	\$45.56	\$1.24	0	
	Toledo, OH	Huntsville, AL	\$3,851	\$0	\$38.24	\$1.04	22	
	Grand Island, NE	Portland, OR	\$5,360	\$229	\$55.50	\$1.51	-2	

<sup>1</sup>A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

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

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

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

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change Y/Y <sup>4</sup>	
				surcharge per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup> / bushel <sup>3</sup>		
Wheat	MT	Chihuahua, CI	\$7,648	\$129	\$79.46	\$2.16	11
	OK	Cuautitlan, EM	\$6,714	\$156	\$70.19	\$1.91	-2
	KS	Guadalajara, JA	\$7,159	\$151	\$74.69	\$2.03	-3
	TX	Salinas Victoria, NL	\$4,086	\$59	\$42.35	\$1.15	2
Corn	IA	Guadalajara, JA	\$8,427	\$178	\$87.92	\$2.23	-2
	SD	Celaya, GJ	\$7,780	\$168	\$81.21	\$2.06	-5
	NE	Queretaro, QA	\$7,618	\$158	\$79.45	\$2.02	-3
	SD	Salinas Victoria, NL	\$6,035	\$128	\$62.97	\$1.60	-4
	MO	Tlalhepantla, EM	\$6,963	\$153	\$72.71	\$1.85	-4
	SD	Torreon, CU	\$7,050	\$141	\$73.47	\$1.86	-2
Soybeans	MO	Bojay (Tula), HG	\$8,365	\$150	\$87.00	\$2.37	-1
	NE	Guadalajara, JA	\$8,929	\$171	\$92.98	\$2.53	-1
	IA	El Castillo, JA	\$9,270	\$167	\$96.43	\$2.62	-2
	KS	Torreon, CU	\$7,226	\$106	\$74.92	\$2.04	0
Sorghum	TX	Guadalajara, JA	\$7,150	\$110	\$74.18	\$1.88	-2
	NE	Celaya, GJ	\$7,404	\$153	\$77.21	\$1.96	-4
	KS	Queretaro, QA	\$7,255	\$96	\$75.11	\$1.91	4
	NE	Salinas Victoria, NL	\$5,883	\$112	\$61.25	\$1.55	2
	NE	Torreon, CU	\$6,662	\$125	\$69.35	\$1.76	0

<sup>1</sup>Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75–110 cars that meet railroad efficiency requirements.

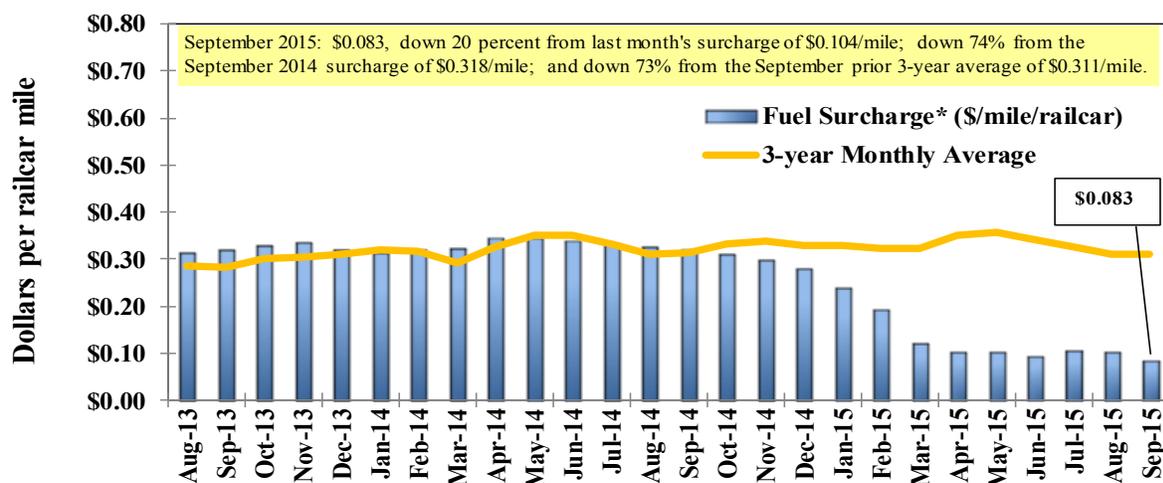
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

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

Figure 7

**Railroad Fuel Surcharges, North American Weighted Average<sup>1</sup>**

<sup>1</sup> Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

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

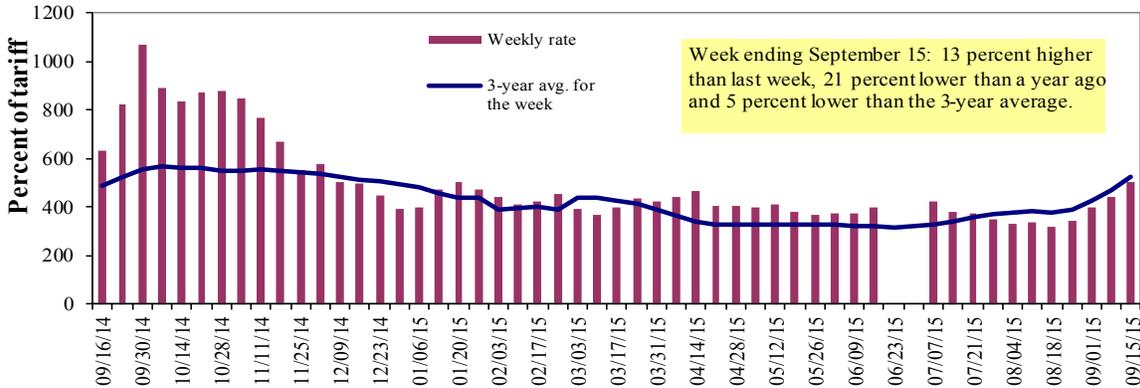
\*\*\*CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

# Barge Transportation

Figure 8

## Illinois River Barge Freight Rate<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	9/15/2015	513	488	500	450	513	513	388
	9/8/2015	445	443	443	425	455	455	425
<b>\$/ton</b>	9/15/2015	31.75	25.96	23.20	17.96	24.06	20.73	12.18
	9/8/2015	27.55	23.57	20.56	16.96	21.34	18.38	13.35
<b>Current week % change from the same week:</b>								
	Last year	-7	-16	-21	-32	-26	-26	-40
	3-year avg. <sup>2</sup>	2	-4	-5	-14	-5	-5	-29
<b>Rate<sup>1</sup></b>	October	605	600	600	500	605	605	480
	December	-	-	440	325	400	400	295

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>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.

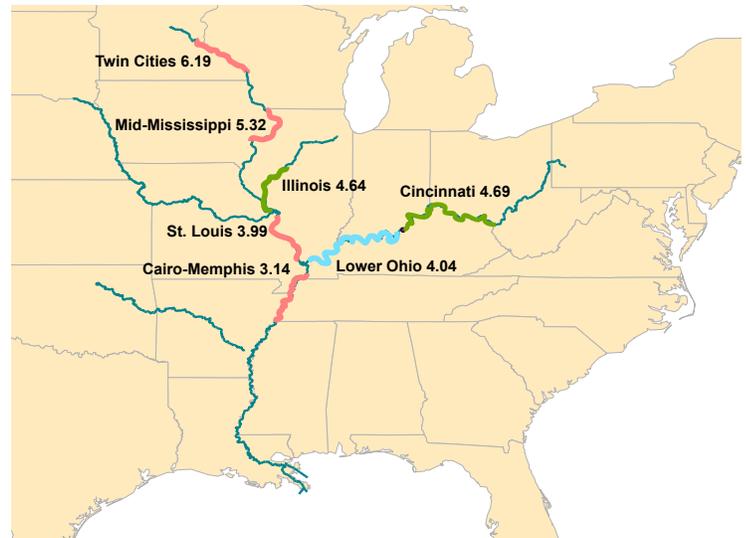
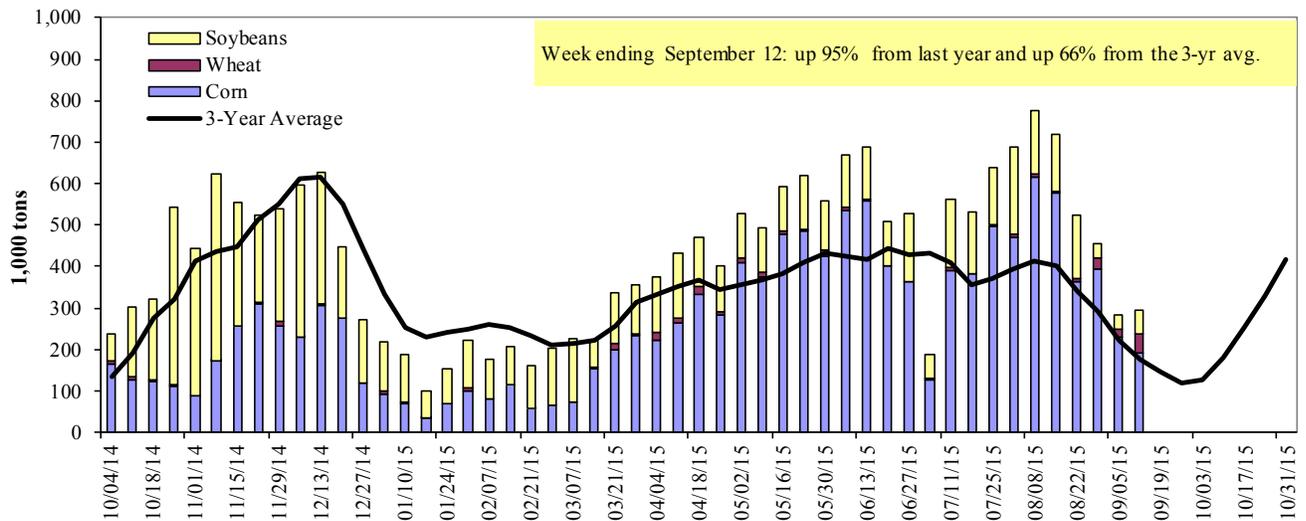


Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

**Barge Grain Movements (1,000 tons)**

Week ending 09/12/2015	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	84	14	11	9	118
Winfield, MO (L25)	105	14	14	14	147
Alton, IL (L26)	186	44	50	14	294
Granite City, IL (L27)	192	44	60	14	310
<b>Illinois River (L8)</b>	109	3	27	0	140
<b>Ohio River (L52)</b>	30	5	5	0	40
<b>Arkansas River (L1)</b>	0	17	10	0	26
Weekly total - 2015	222	66	75	14	377
Weekly total - 2014	188	24	28	8	249
2015 YTD <sup>1</sup>	15,324	1,476	6,803	180	23,783
2014 YTD	16,117	1,931	4,884	150	23,082
2015 as % of 2014 YTD	95	76	139	120	103
Last 4 weeks as % of 2014 <sup>2</sup>	93	119	217	139	108
Total 2014	20,693	2,181	11,813	258	34,946

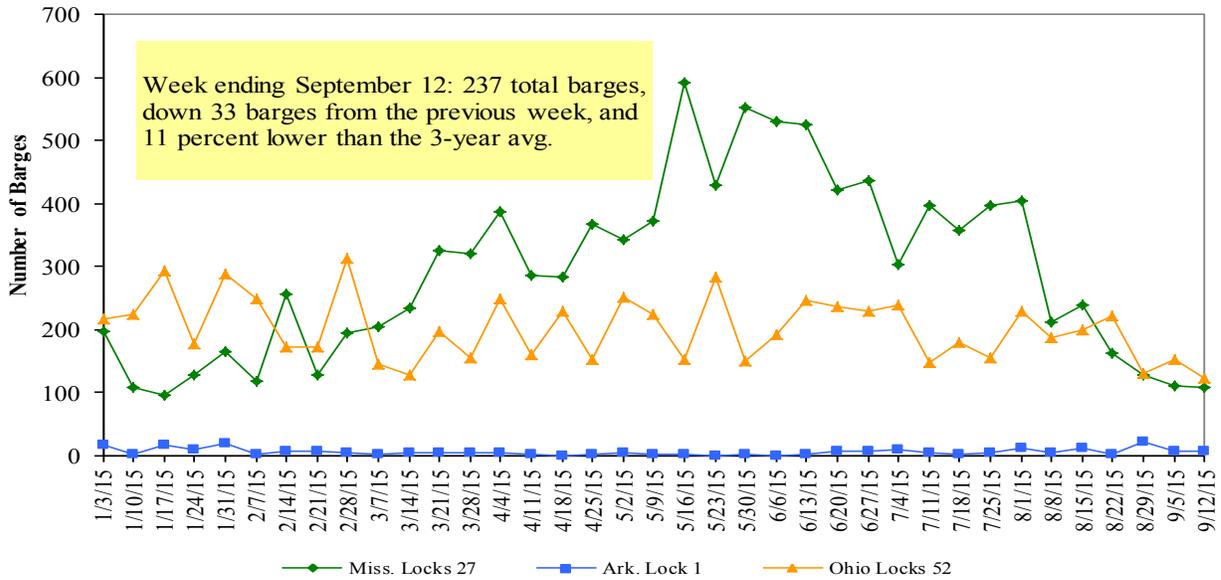
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

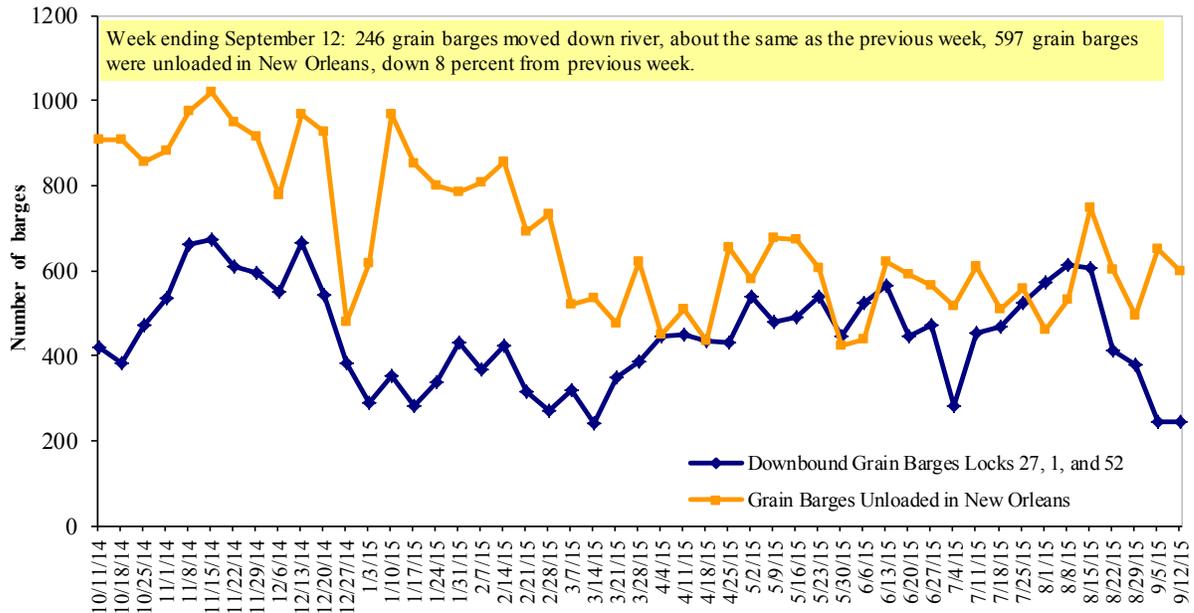
Source: U.S. Army Corps of Engineers

**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<sup>1</sup>, Week Ending 9/14/2015 (US \$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.575	-0.019	-1.250
	New England	2.653	-0.010	-1.258
	Central Atlantic	2.694	-0.022	-1.211
	Lower Atlantic	2.468	-0.021	-1.276
II	Midwest <sup>2</sup>	2.471	-0.012	-1.272
III	Gulf Coast <sup>3</sup>	2.362	-0.023	-1.344
IV	Rocky Mountain	2.554	-0.013	-1.304
V	West Coast	2.733	-0.013	-1.286
	West Coast less California	2.571	-0.019	-1.396
	California	2.863	-0.009	-1.199
Total	U.S.	2.517	-0.017	-1.284

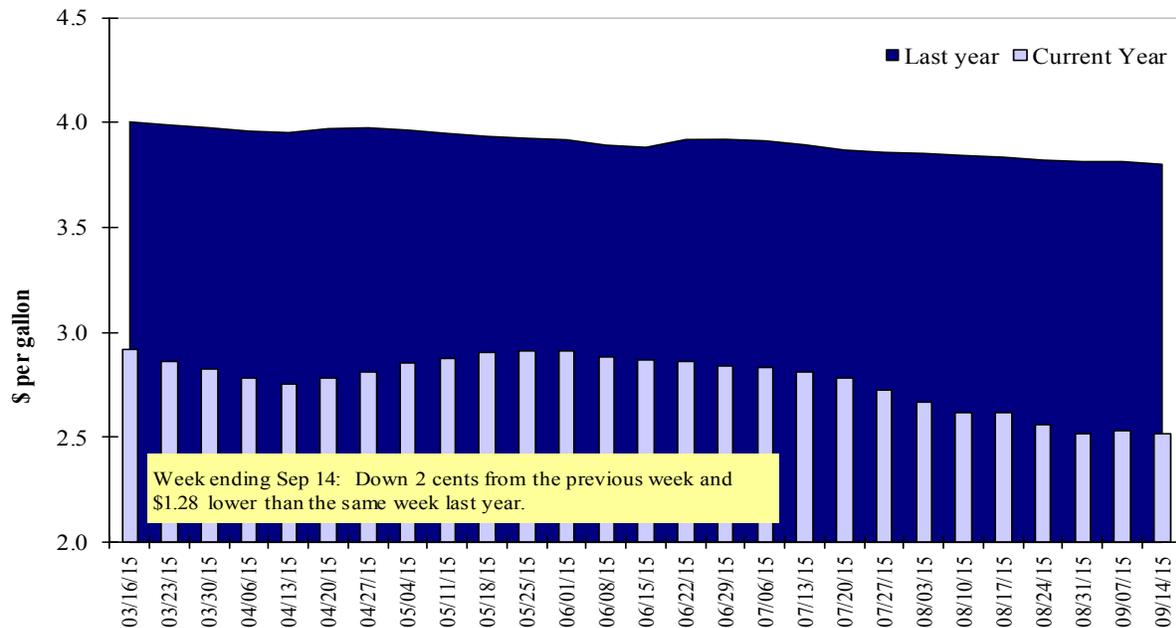
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>Same as South Central

Source: Energy Information Administration/U.S. Department of Energy ([www.eia.doe.gov](http://www.eia.doe.gov))

Figure 13

**Weekly Diesel Fuel Prices, U.S. Average**



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

# Grain Exports

Table 12

## U.S. Export Balances and Cumulative Exports (1,000 metric tons)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
9/3/2015	1,296	818	1,790	939	173	5,016	8,539	16,043	29,598
This week year ago	1,534	1,027	1,734	1,009	49	5,353	11,684	23,926	40,963
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2015/16 YTD	1,603	1,096	1,412	891	338	5,340	267	21	5,628
2014/15 YTD	2,227	1,302	2,060	1,036	148	6,773	696	73	7,542
YTD 2015/16 as % of 2014/15	72	84	69	86	228	79	38	29	75
Last 4 wks as % of same period 2014/15	89	82	108	97	408	98	37	21	35
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

<sup>1</sup> Current unshipped export sales to date

<sup>2</sup> 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](http://www.fas.usda.gov))

Table 13

## Top 5 Importers<sup>1</sup> of U.S. Corn

Week ending 09/03/2015	Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2011-2013 - 1,000 mt -
	2015/16 Current MY	2014/15 Last MY		
Japan	1,632	2,352	(31)	10,079
Mexico	3,181	3,069	4	8,145
Korea	123	218	(43)	2,965
Colombia	604	1,130	(47)	3,461
Taiwan	139	207	(33)	1,238
<b>Top 5 Importers</b>	<b>5,679</b>	<b>6,975</b>	<b>(19)</b>	<b>25,887</b>
<b>Total US corn export sales</b>	<b>8,806</b>	<b>12,380</b>	<b>(29)</b>	<b>34,445</b>
% of Projected	19%	26%		
Change from prior week	<b>1,838</b>	<b>1,905</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	64%	56%		75%
<b>USDA forecast, September 2015</b>	<b>47,074</b>	<b>47,710</b>	<b>(1)</b>	
<b>Corn Use for Ethanol USDA forecast, September 2015</b>	<b>133,350</b>	<b>132,207</b>	<b>1</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup> Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
<http://www.fas.usda.gov/esrquery/>

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

Table 14

**Top 5 Importers<sup>1</sup> of U.S. Soybeans**

Week Ending 09/03/2015	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2011-13
	2015/16 Current MY	2014/15 Last MY		
				- 1,000 mt -
China	6,069	13,335	(54)	24,211
Mexico	972	901	8	2,971
Indonesia	135	524	(74)	1,895
Japan	684	457	49	1,750
Taiwan	291	466	(38)	1,055
<b>Top 5 importers</b>	<b>8,150</b>	<b>15,683</b>	<b>(48)</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>16,064</b>	<b>23,999</b>	<b>(33)</b>	<b>39,169</b>
% of Projected	34%	48%		
Change from prior week	2,613	2,325		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>51%</b>	<b>65%</b>		<b>81%</b>
<b>USDA forecast, September 2015</b>	<b>47,003</b>	<b>50,000</b>	<b>(6)</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/><sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

**Top 10 Importers<sup>1</sup> of All U.S. Wheat**

Week Ending 09/03/2015	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr avg 2012-2014
	2015/16 Current MY	2014/15 Last MY		
				- 1,000 mt -
Japan	986	1,265	(22)	3,113
Mexico	1,054	1,456	(28)	2,807
Nigeria	907	1,246	(27)	2,512
Philippines	867	974	(11)	2,105
Brazil	290	1,217	(76)	2,091
Korea	540	720	(25)	1,273
Taiwan	449	516	(13)	1,007
Indonesia	120	295	(59)	751
Colombia	290	305	(5)	662
Thailand	144	164		618
<b>Top 10 importers</b>	<b>5,502</b>	<b>7,994</b>	<b>(31)</b>	<b>16,939</b>
<b>Total US wheat export sales</b>	<b>10,357</b>	<b>12,126</b>	<b>(15)</b>	<b>26,361</b>
% of Projected	42%	52%		
Change from prior week	290	690		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>53%</b>	<b>66%</b>		<b>64%</b>
<b>USDA forecast, September 2015</b>	<b>24,523</b>	<b>23,270</b>	<b>5</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/><sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 16

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

Port regions	Week ending 09/10/15	Previous Week <sup>1</sup>	Current Week as % of Previous	2015 YTD <sup>1</sup>	2014 YTD <sup>1</sup>	2015 YTD as % of 2014 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2014
							2014	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	174	236	74	7,516	8,970	84	75	61	12,436
Corn	117	153	76	6,760	7,000	97	55	190	7,781
Soybeans	0	0	n/a	4,087	4,502	91	102	28	12,887
<b>Total</b>	<b>291</b>	<b>389</b>	<b>75</b>	<b>18,363</b>	<b>20,471</b>	<b>90</b>	<b>66</b>	<b>80</b>	<b>33,104</b>
<b>Mississippi Gulf</b>									
Wheat	237	112	213	3,312	3,582	92	96	77	4,495
Corn	334	585	57	21,274	22,711	94	95	138	30,912
Soybeans	364	65	564	12,668	10,802	117	249	125	29,087
<b>Total</b>	<b>936</b>	<b>761</b>	<b>123</b>	<b>37,254</b>	<b>37,096</b>	<b>100</b>	<b>111</b>	<b>120</b>	<b>64,495</b>
<b>Texas Gulf</b>									
Wheat	106	69	155	2,799	4,646	60	64	56	6,120
Corn	47	0	n/a	450	453	99	99	410	580
Soybeans	0	0	n/a	210	257	82	n/a	0	949
<b>Total</b>	<b>154</b>	<b>69</b>	<b>224</b>	<b>3,458</b>	<b>5,357</b>	<b>65</b>	<b>68</b>	<b>66</b>	<b>7,649</b>
<b>Interior</b>									
Wheat	45	29	156	1,017	989	103	51	99	1,400
Corn	167	137	122	4,356	4,054	107	81	150	5,677
Soybeans	22	31	71	2,101	2,347	90	85	90	4,312
<b>Total</b>	<b>234</b>	<b>197</b>	<b>119</b>	<b>7,474</b>	<b>7,391</b>	<b>101</b>	<b>65</b>	<b>126</b>	<b>11,389</b>
<b>Great Lakes</b>									
Wheat	83	34	240	712	397	179	276	250	935
Corn	31	10	322	406	175	232	113	296	288
Soybeans	0	0	n/a	86	51	170	n/a	0	988
<b>Total</b>	<b>114</b>	<b>44</b>	<b>258</b>	<b>1,204</b>	<b>622</b>	<b>194</b>	<b>189</b>	<b>261</b>	<b>2,211</b>
<b>Atlantic</b>									
Wheat	36	0	n/a	399	378	105	57	44	553
Corn	0	4	0	115	572	20	25	42	816
Soybeans	4	3	123	963	997	97	715	162	2,119
<b>Total</b>	<b>40</b>	<b>7</b>	<b>539</b>	<b>1,477</b>	<b>1,947</b>	<b>76</b>	<b>51</b>	<b>51</b>	<b>3,487</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	682	480	142	15,755	18,962	83	81	69	25,939
Corn	697	888	78	33,361	34,965	95	85	149	46,054
Soybeans	390	99	395	20,114	18,956	106	212	113	50,342
<b>Total</b>	<b>1,768</b>	<b>1,467</b>	<b>121</b>	<b>69,230</b>	<b>72,884</b>	<b>95</b>	<b>91</b>	<b>105</b>	<b>122,335</b>

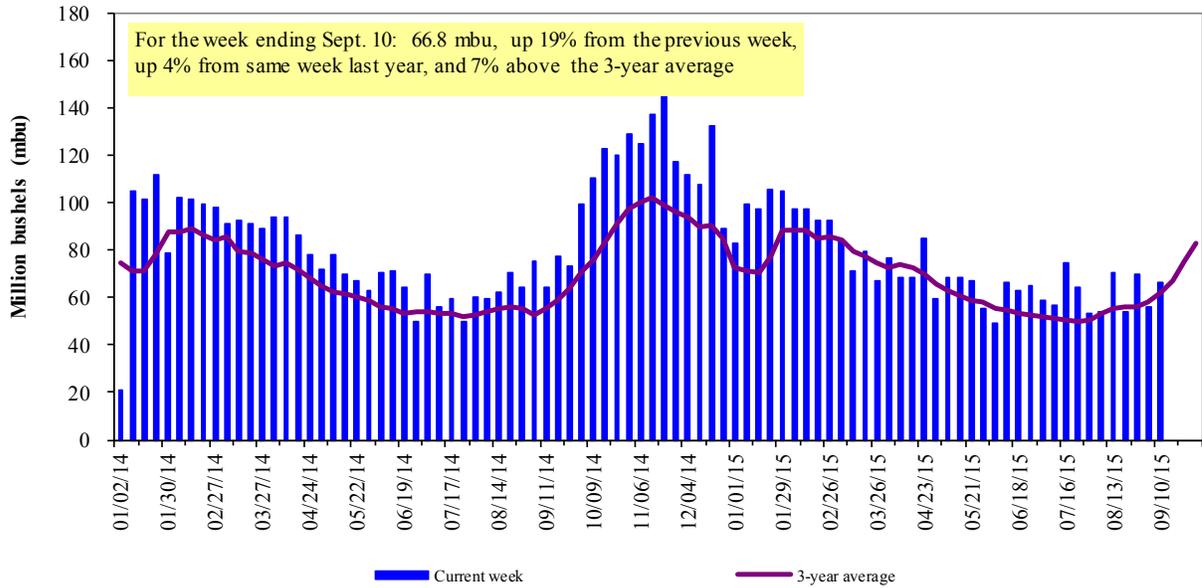
<sup>1</sup>Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

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

Figure 14

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

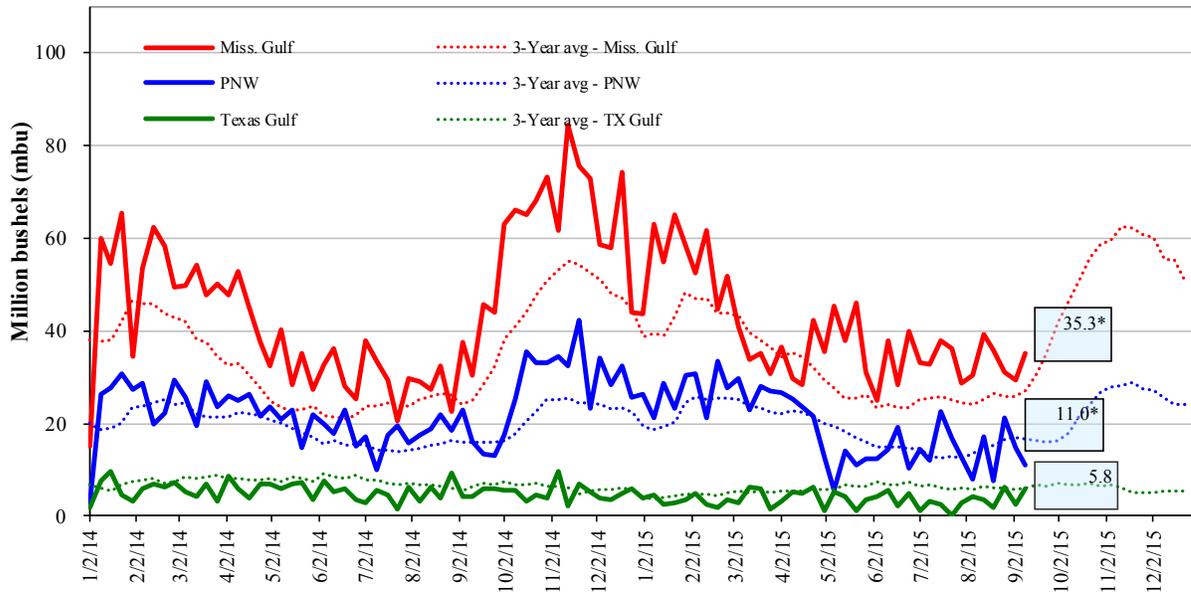


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



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

September 10: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 20	up 129	up 28	down 25
Last year (same week)	up 16	up 18	up 18	down 32
3-yr avg. (4-wk mov. avg.)	up 30	up 23	up 23	down 32

# Ocean Transportation

Table 17

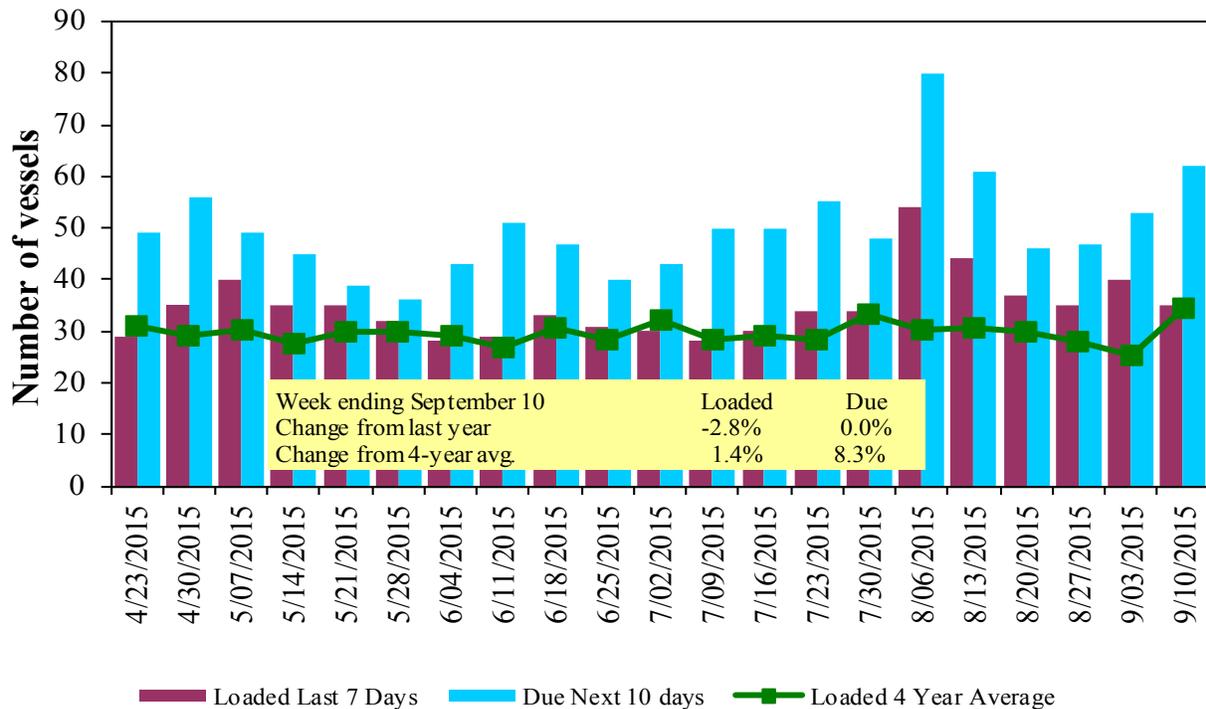
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
9/10/2015	38	35	62	9	n/a
9/3/2015	36	40	53	8	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

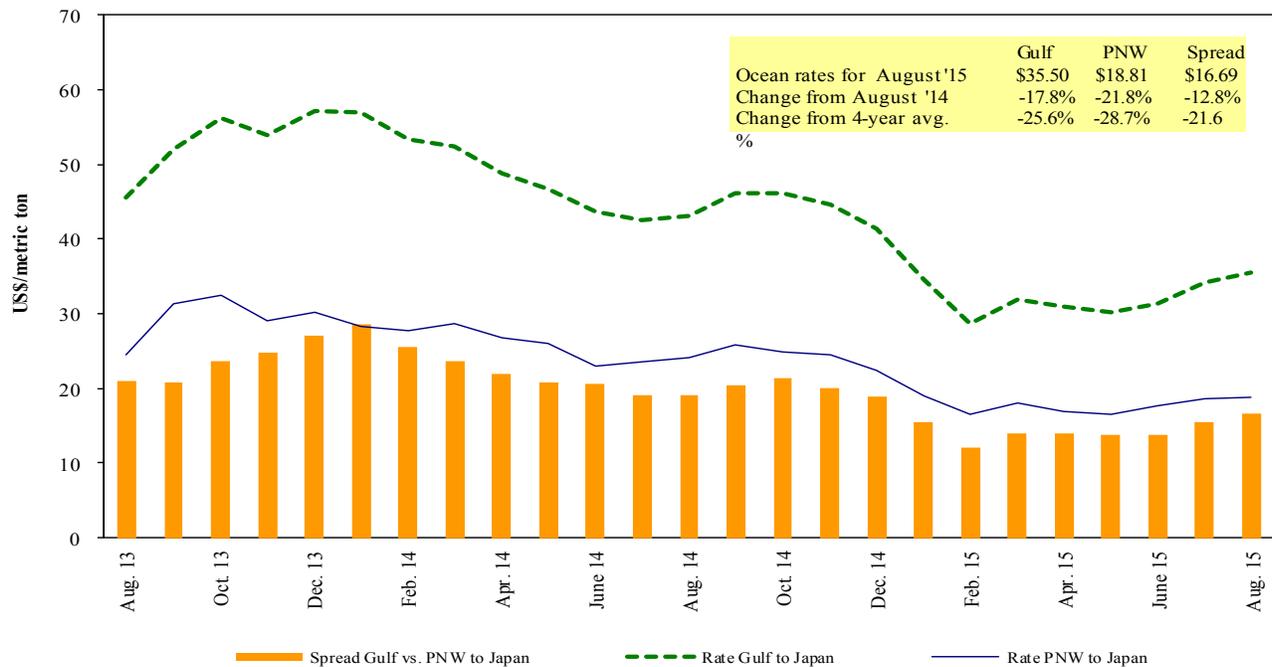
**U.S. Gulf<sup>1</sup> Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA  
<sup>1</sup>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 09/12/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 5/15	55,000	32.00
U.S. Gulf	China	Heavy Grain	Oct 5/15	55,000	31.50
U.S. Gulf	China	Heavy Grain	Sep 30/ Oct 4	55,000	32.25
U.S. Gulf	China	Heavy Grain	Nov 1/30	55,000	34.50
U.S. Gulf	China	Heavy Grain	Sep 10/20	58,000	36.00
U.S. Gulf	China	Heavy Grain	Sep 1/10	60,000	33.00
U.S. Gulf	Guatemala <sup>1</sup>	Corn	Jul 20/30	10,000	108.18
U.S. Gulf	Israel	Grain	Aug 21/28	32,000	25.00
Black Sea	Saudi Arabia	Grain	Aug 15/20	60,000	26.25
Brazil	China	Heavy Grain	Sep 20/30	60,000	24.25
Brazil	China	Grain	Aug 10/30	60,000	25.25
Brazil	China	Heavy Grain	Aug 15/25	60,000	24.50
EC S. America	China	Grain	Sep 25/Oct 5	65,000	22.50
France	Algeria	Wheat	Sep 8/10	23,500	17.50
France	Algeria	Heavy Grain	Sep 5/10	25,000	18.00
Latvia	Algeria	Grain	Sep 1/5	45,000	19.25
Lithuania	Sp Mediterranean	Grain	Sep 10/14	25,000	19.50
River Plate	Jordan	Corn	Aug 15/20	35,000	41.00

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

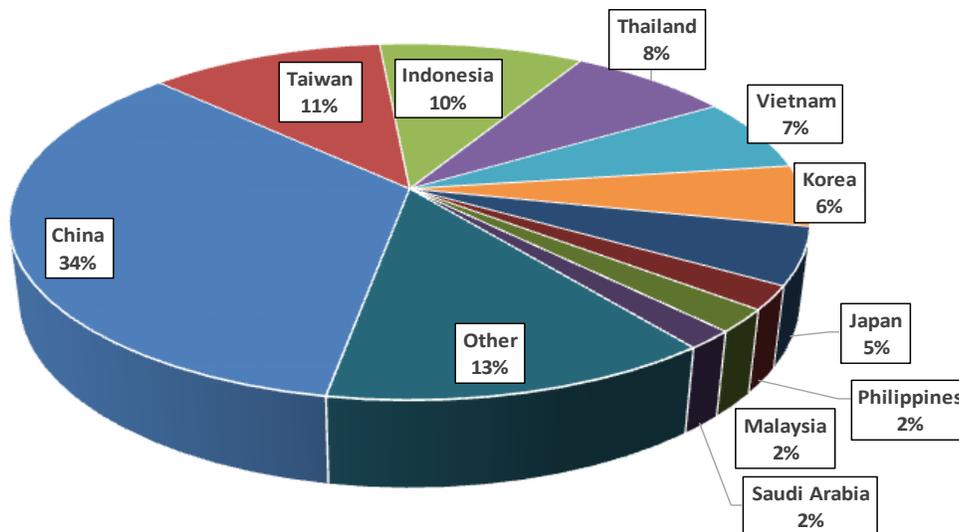
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-June 2015**

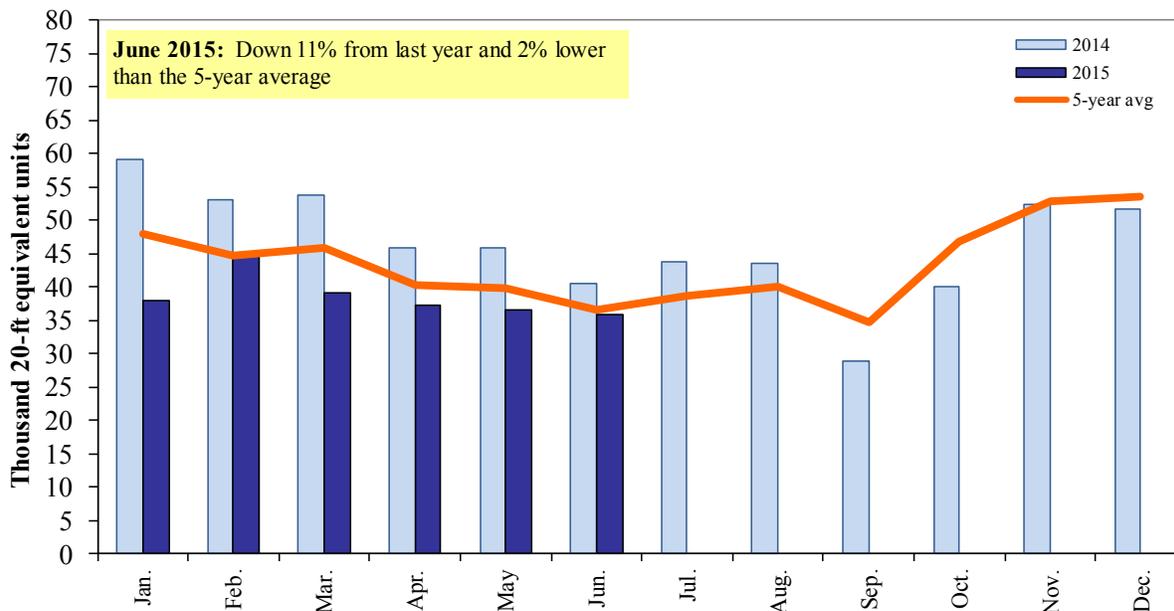


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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