



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service  
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June 25, 2015

## WEEKLY HIGHLIGHTS

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### TEMCO Grain Export Facility Completes Upgrades

On June 16, elected officials and management of TEMCO terminal in Kalama, Washington celebrated the completion of a two-year construction project expanding the capacity of the terminal to 6 million metric tons of grains and oilseeds annually. This is an increase of nearly three-times the previous capacity. The terminal would perform cleaning, storing, and transferring of commodities by rail and barge to oceangoing vessels. The jointly owned CHS Inc. and Cargill grain terminal will increase the number of ship calls from 50 to 135 each year, decrease loading times, increase local jobs and also provide customers greater access to high-demand Pacific Rim markets. The facility is eventually expected to increase its share of world wheat exports, which have been falling in the last few year years due to increasing world wheat production.

### Maritime Summit between EU, US and China Boosts Cooperation

The Federal Maritime Commission reported that on June 18, representatives from the maritime regulatory authorities of the European Union, the People's Republic of China and the United States met in Brussels to discuss antitrust and regulatory issues in maritime transport. The discussions focused on the global trend towards increased cooperation in the liner shipping market, as well as on regulatory and policy issues related to ports. With the continued growth in scope of carriers' cooperation, the authorities considered that monitoring of the sector warrants ever closer contact and better communication between competition and regulatory authorities. Delegates also discussed their respective enforcement activities and highlighted each authority's priority issues such as port congestion.

### High Water Continues to Disrupt Grain Shipping

Heavy rains in the central U.S. continue to raise water levels, which has halted most traffic on the Illinois River and slowed traffic on the Mississippi River at St. Louis. High Illinois River levels have prevented a majority of grain facilities from loading onto barges. Barge operators are not quoting rates for Illinois River barge services until most loading facilities are operational, which will occur sometime after the expected June 25 crest. Barge operators have limited operations in the St. Louis area partly due to accumulations of flood-caused debris that can damage towboats and barges. In addition, tows of barges greater than 600 feet are restricted to daylight only passage while the St. Louis gage is greater than 25 feet. As of June 24, the St. Louis gage was 36.6 feet and dropping, and is not forecast to be lower than 25 feet until July 4. However, year-to-date barge shipments are 15 percent above the 5-year average.

## Snapshots by Sector

### Export Sales

During the week ending June 11, **unshipped balances** of wheat, corn, and soybeans totaled 18.4 mmt, 1 percent lower than at the same time last year. Net weekly **wheat export sales** of 0.316 mmt were down 16 percent from the prior week. **Corn export sales** of 0.627 mmt were up 27 percent, and **soybean export sales** of 0.133 mmt were down 19 percent from the prior week.

### Rail

U.S. railroads originated 20,189 **carloads of grain** during the week ending June 13, up 12 percent from last week, 0.6 percent from last year, and 11 percent from the 3-year average.

During the week ending June 18, average July shuttle **secondary railcar bids/offers per car** were \$216 below tariff, up \$72 from last week and \$853 lower than last year. Non-shuttle secondary railcar bids/offers were \$38 below tariff, down \$38 from last week and \$438 lower than last year.

### Barge

During the week ending June 20, **barge grain movements** totaled 676,450 tons—about 22 percent lower than the previous week and 17 percent lower than the same period last year.

During the week ending June 20, 447 grain barges **moved down river**, down 21 percent from last week; 591 grain barges were **unloaded in New Orleans**, down 5 percent from the previous week.

### Ocean

During the week ending June 18, 33 **ocean-going grain vessels** were loaded in the Gulf, 3 percent more than the same period last year. Forty-seven vessels are expected to be loaded within the next 10 days, 47 percent more than the same period last year.

During the week ending June 19, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$32.50 per metric ton (mt), up 5 percent from the previous week. The cost of shipping from the PNW to Japan was \$18.50 per mt, up 7 percent from the previous week.

### Fuel

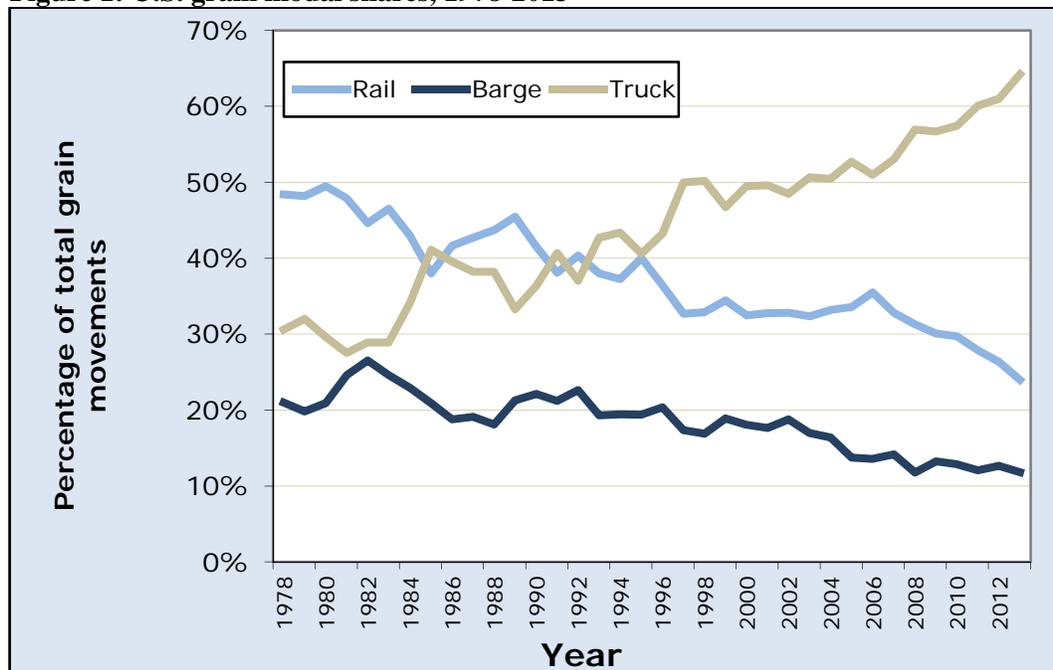
During the week ending June 22, U.S. average **diesel fuel prices** decreased 1 cents from the previous week to \$2.86 per gallon—down \$1.06 from the same week last year.

## Transportation of U.S. Grains: A Modal Share Analysis, 1978-2013 Update

On June 24, USDA's Agricultural Marketing Service issued an updated modal share report, [Transportation of U.S. Grains: A Modal Share Analysis, 1978-2013 Update](#). This report provides estimates of the volumes of corn, wheat, soybeans, sorghum, and barley moved to either the domestic market or to U.S. ports/border points for export between 1978 and 2013 via rail, barge, and truck. The report, part of a continuing series of modal share reports, examines trends in the type of transportation used to move grains grown for the food, feed, and, more recently, the biofuel industry. The update provides revised data to the previous reports and new data for 2012 and 2013. The data is used to analyze the transportation implications of the underlying changes in the fundamental supply and demand of grain commodities. This article presents the key findings of the modal share analysis and discusses the implications for grain transportation.

One of the main findings of the modal share analysis was the continued increase in the percent of grain moved by trucks (see figure 1). In terms of percent of total movements, the truck share became the dominant mode in 1993 and since then its share has continued to increase over rail and barge. The use of trucks to transport grain allows farmers the flexibility of delivering their products to a variety of markets. With new markets, such as local ethanol and bio-diesel facilities, the farmer has more options for selling grain locally to maximize profits. The noticeable jump in the share of grain moved by truck since 2006 is likely because of the significant increase in corn ethanol production, which is concentrated within trucking distance of where the corn is grown.

**Figure 1: U.S. grain modal shares, 1978-2013**



The availability of modal share data for domestic and export movements provides insight on grain transportation demand and the relative importance of each mode of transportation. Table 1 shows a summary of modal shares for each of the three major grains for 2013 compared with the average for the 5 years from

2008 to 2012. The leading mode of transport for exporting corn and soybeans is barge, and rail moves most of the export wheat. For domestic traffic of corn and soybeans, trucks are the principal mode of transport. Domestic wheat is primarily transported by rail. Export corn and soybeans moves by barge to port for eventual overseas transport to foreign markets.

Table 1 – Modal share of corn, wheat, and soybeans, by market, 2013 and 5-year average

Year Mode	Corn			Wheat			Soybeans		
	Exports	Domestic	All Corn	Exports	Domestic	All Wheat	Exports	Domestic	All Soybeans
<b>2013</b>									
Rail	27	17	18	49	53	51	29	14	21
Barge	61	1	6	40	2	21	42	3	22
Truck	12	82	76	11	45	27	29	83	57
<b>5-Year average</b>									
Rail	36	20	23	66	65	66	38	13	25
Barge	54	1	9	29	2	14	49	2	23
Truck	10	79	68	6	33	20	13	84	52

Note: Column totals are intended to add to 100 percent, but may not add due to rounding

Additionally, the modal share analysis showed that the significant growth in annual grain production led to an increase in domestic grain traffic with record corn and soybean crops in 2013. However, there were some unusual weather conditions during 2011 to 2013, which caused some variation from typical trends. In 2011, flooding in the central U.S. lowered the volumes of barged and railed grain. In 2012, drought conditions significantly lowered export corn tonnages by barge, while export soybeans showed increases in tonnages. During 2013, crops were limited by the previous year’s drought, and barged and railed corn tonnages and export barged soybean tonnages decreased.

**Methodology used in report.** This analysis uses the Waterborne Commerce Statistics of the U.S. Army Corps of Engineers to calculate tonnages of barged grain and the Carload Waybill Sample from the U.S. Surface Transportation Board to provide the amount of railed grain. Trucking data are the residual quantity derived from subtracting the estimates of the railed and barged volumes from known grain production data. This update revises previous versions of this report, with some minor revisions of earlier data. The procedures used in this updated report contain refinements to avoid double counting barge and rail data. When barge and rail are used in combination to ship grain, with barge being the final mode in the transportation route, only the barge movement is included.

The latest report with the 2008–2013 data, the previous version containing the complete methodology, and accompanying datasets can be viewed at [Transportation of U.S. Grains: A Modal Share Analysis, 1978-2013 Update](#). [Nick.Marathon@ams.usda.gov](mailto:Nick.Marathon@ams.usda.gov) , [Adam.Sparger@ams.usda.gov](mailto:Adam.Sparger@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
06/24/15	192	251	202	n/a	145	131
06/17/15	193	253	200	219	139	122

<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)

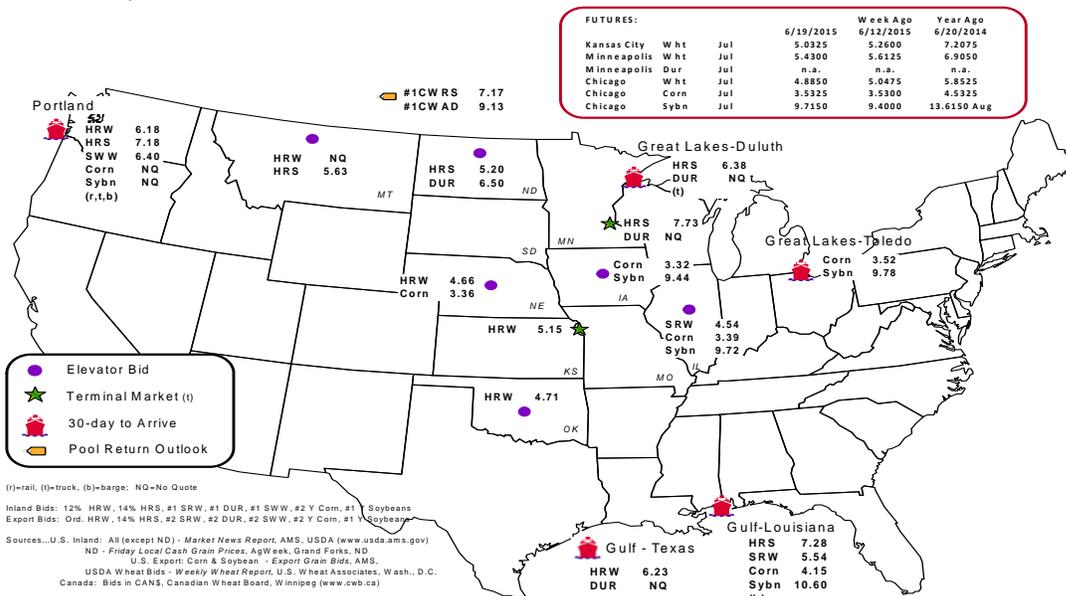
Commodity	Origin--Destination	6/19/2015	6/12/2015
Corn	IL--Gulf	-0.76	-0.71
Corn	NE--Gulf	-0.79	-0.74
Soybean	IA--Gulf	-1.16	-1.09
HRW	KS--Gulf	-1.08	-1.00
HRS	ND--Portland	-1.98	-2.08

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				
6/17/2015 <sup>p</sup>	115	533	3,112	404	4,164	6/13/2015	1,799	
6/10/2015 <sup>r</sup>	18	869	2,282	32	3,201	6/6/2015	2,111	
2015 YTD <sup>r</sup>	10,813	32,669	108,657	12,894	165,033	2015 YTD	41,714	
2014 YTD <sup>r</sup>	20,185	42,034	115,694	15,727	193,640	2014 YTD	45,666	
2015 YTD as % of 2014 YTD	54	78	94	82	85	% change YTD	91	
Last 4 weeks as % of 2014 <sup>2</sup>	93	50	74	81	67	Last 4wks % 2014	92	
Last 4 weeks as % of 4-year avg. <sup>2</sup>	39	63	92	132	82	Last 4wks % 4 yr	110	
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467	
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397	

<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.

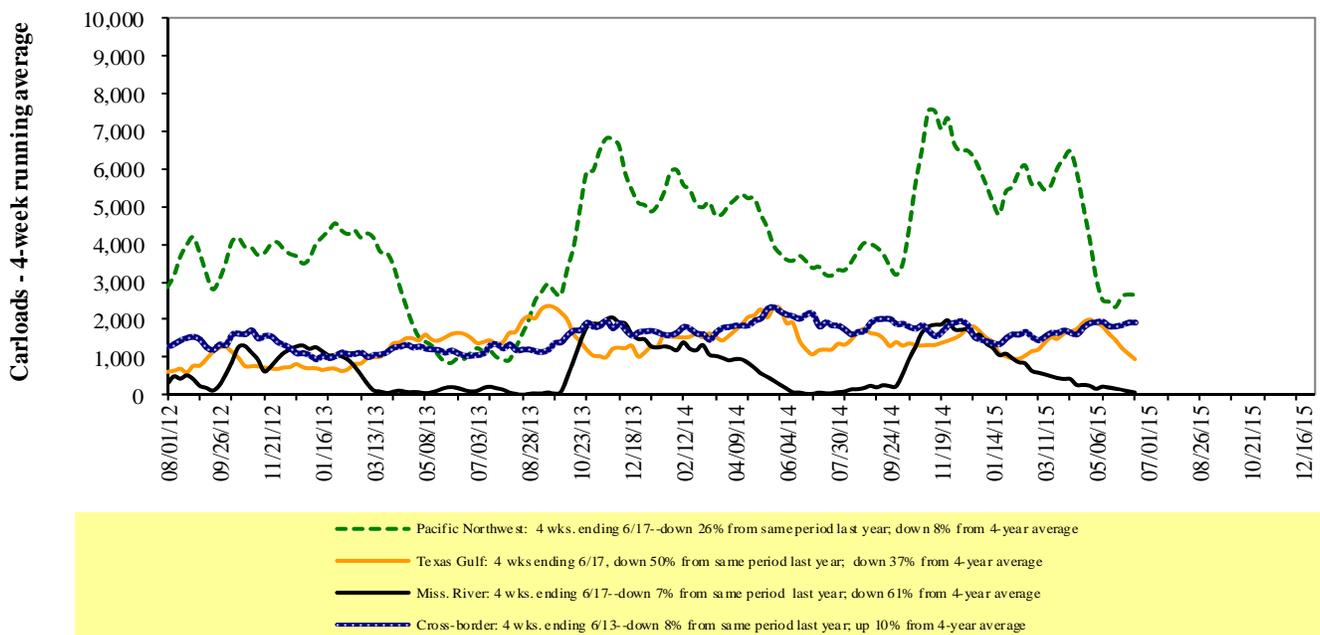
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

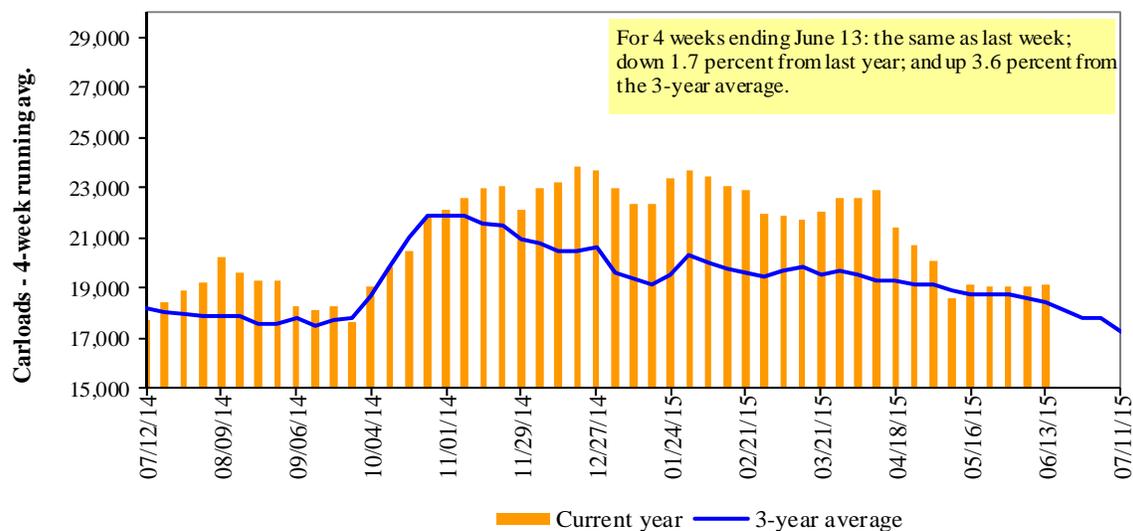
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
06/13/15	2,086	3,088	9,211	1,063	4,741	20,189	4,266	4,809
This week last year	2,215	3,372	8,481	589	5,421	20,078	5,352	5,899
2015 YTD	47,696	70,650	230,858	20,213	119,230	488,647	95,144	100,449
2014 YTD	43,455	68,843	205,063	20,337	132,636	470,334	101,419	122,169
2015 YTD as % of 2014 YTD	110	103	113	99	90	104	94	82
Last 4 weeks as % of 2014 <sup>1</sup>	108	112	95	146	84	97	88	79
Last 4 weeks as % of 3-yr avg. <sup>2</sup>	117	113	99	170	93	103	111	102
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							
	Jul-15	Jul-14	Aug-15	Aug-14	Sep-15	Sep-14	Oct-15	Oct-14
<b>6/18/2015</b>								
BNSF <sup>3</sup>								
COT grain units	0	no offer	4	no offer	11	902	10	no offer
COT grain single-car <sup>5</sup>	0..1	no offer	0..11	no offer	0..131	847..1251	0..131	no offer
UP <sup>4</sup>								
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

<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.

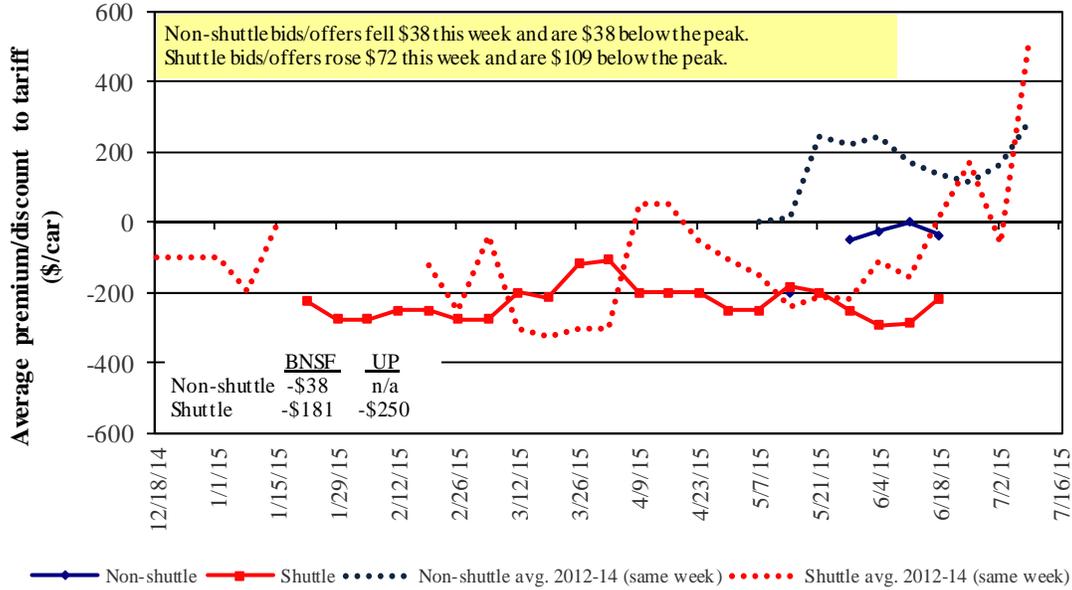
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 July 2015, Secondary Market**

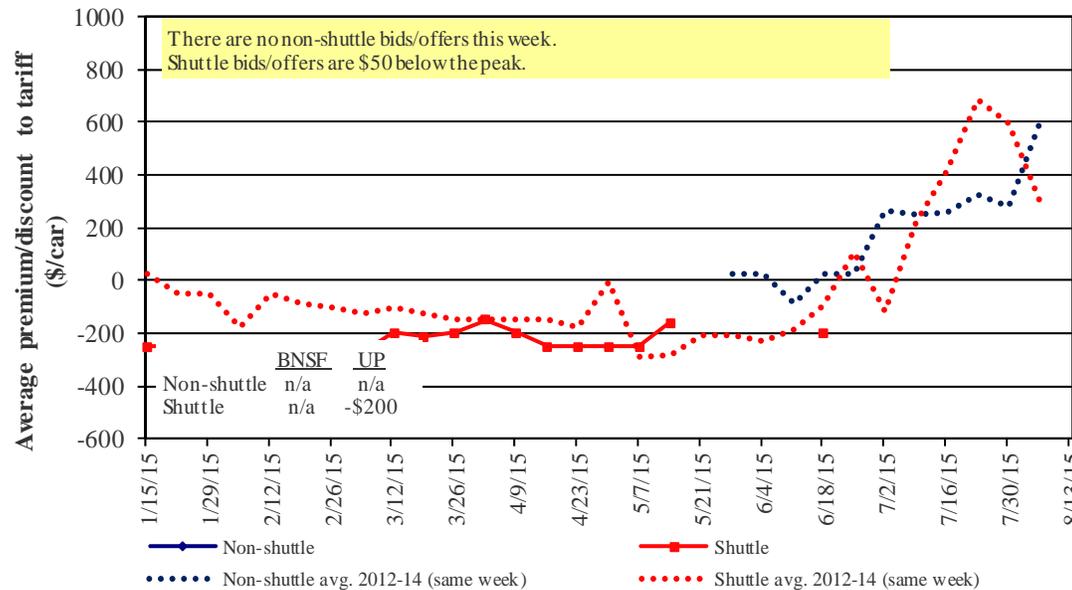


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

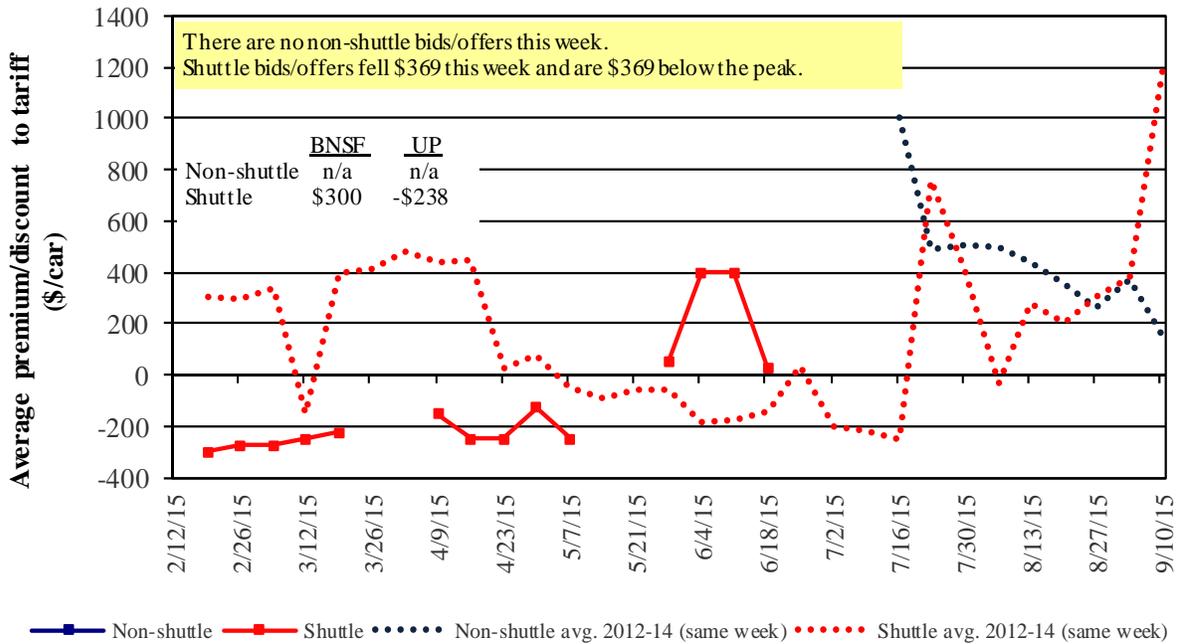


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**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

Table 6

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

Week ending	Delivery period					
	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15
<b>Non-shuttle</b>						
BNSF-GF	(38)	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(438)	n/a	n/a	n/a	n/a	n/a
UP-Pool	n/a	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	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
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(181)	n/a	300	800	n/a	n/a
Change from last week	69	n/a	(100)	-	n/a	n/a
Change from same week 2014	(1,106)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(250)	(200)	(238)	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	(600)	(575)	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>
6/1/2015	metric ton					bushel <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	\$4,143	\$24	\$41.38	\$1.13	12	
	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	-3	
	Toledo, OH	Raleigh, NC	\$5,555	\$173	\$56.88	\$1.44	12	
	Des Moines, IA	Davenport, IA	\$2,168	\$30	\$21.83	\$0.55	2	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$130	\$48.57	\$1.23	12	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$83	\$41.58	\$1.06	14	
	Des Moines, IA	Little Rock, AR	\$3,308	\$88	\$33.72	\$0.86	-2	
	Des Moines, IA	Los Angeles, CA	\$4,852	\$255	\$50.72	\$1.29	-14	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,699	\$127	\$37.99	\$1.03	0	
	Toledo, OH	Huntsville, AL	\$4,676	\$123	\$47.66	\$1.30	20	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$174	\$57.59	\$1.57	12	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$83	\$44.20	\$1.20	24	
	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	0	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$55	\$39.46	\$1.07	-2	
	Chicago, IL	Albany, NY	\$4,723	\$162	\$48.51	\$1.32	12	
	Grand Forks, ND	Portland, OR	\$5,611	\$122	\$56.93	\$1.55	0	
	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	1	
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$148	\$52.91	\$1.34	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,130	\$136	\$52.29	\$1.33	-6	
	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	-5	
	Des Moines, IA	Amarillo, TX	\$3,690	\$110	\$37.74	\$0.96	-2	
	Minneapolis, MN	Tacoma, WA	\$5,180	\$147	\$52.90	\$1.34	-6	
	Council Bluffs, IA	Stockton, CA	\$4,600	\$152	\$47.19	\$1.20	-7	
	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	-6	
	Fargo, ND	Tacoma, WA	\$5,580	\$121	\$56.61	\$1.54	-5	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$162	\$45.56	\$1.24	-1	
	Toledo, OH	Huntsville, AL	\$3,851	\$123	\$39.46	\$1.07	25	
	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**

Effective date: 6/1/2015

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change Y/Y <sup>4</sup>	
				surcharges <sup>2</sup> per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup> bushel <sup>3</sup>		
Wheat	MT	Chihuahua, CI	\$7,599	\$129	\$78.96	\$2.15	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	-6
	NE	Queretaro, QA	\$7,618	\$158	\$79.45	\$2.02	-4
	SD	Salinas Victoria, NL	\$6,035	\$128	\$62.97	\$1.60	-5
	MO	Tlalnepantla, EM	\$6,963	\$153	\$72.71	\$1.85	-5
	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	-3
	NE	Celaya, GJ	\$7,404	\$153	\$77.21	\$1.96	-5
	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	-1

<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

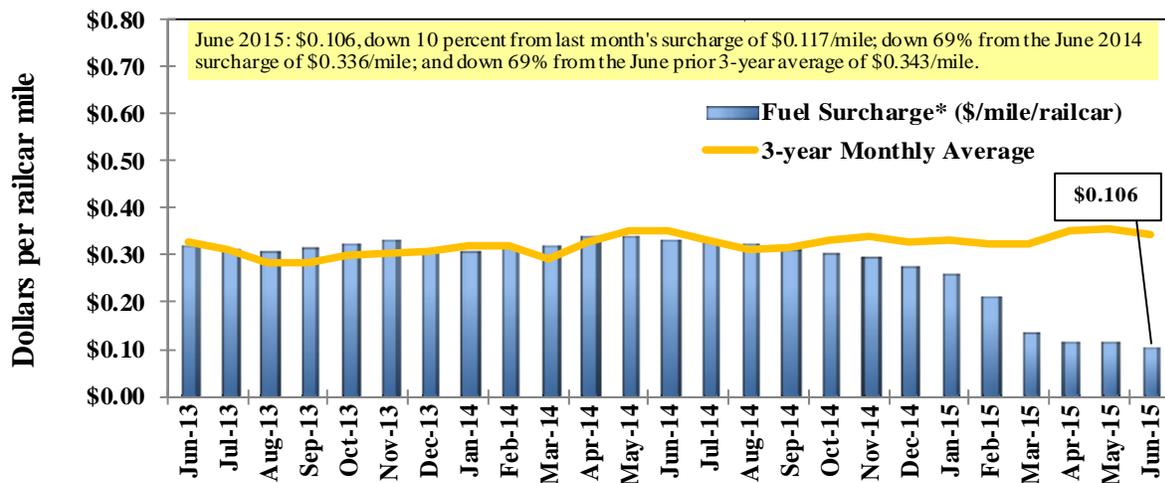
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

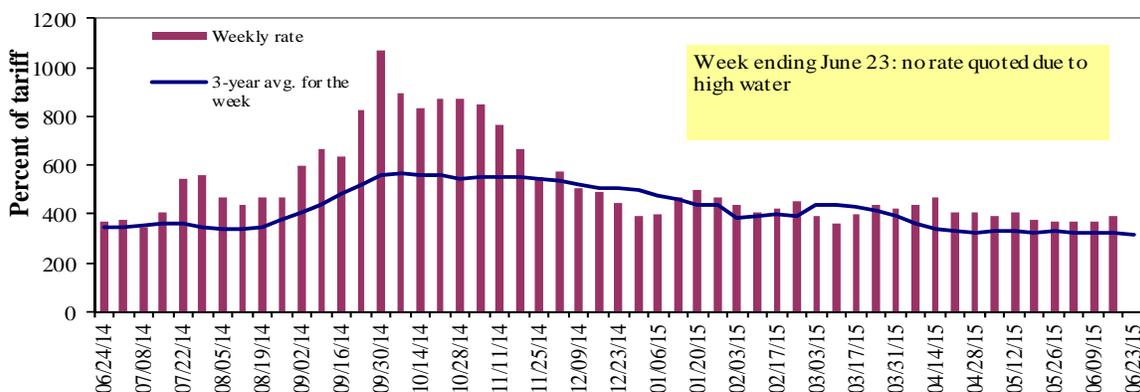
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	6/23/2015	538	460	-	358	350	350	273
	6/16/2015	450	428	395	320	315	315	260
<b>\$/ton</b>	6/23/2015	33.30	24.47	-	14.28	16.42	14.14	8.57
	6/16/2015	27.86	22.77	18.33	12.77	14.77	12.73	8.16
<b>Current week % change from the same week:</b>								
	Last year	-	24	-	44	47	51	27
	3-year avg. <sup>2</sup>	37	40	-	54	52	52	38
<b>Rate<sup>1</sup></b>	July	513	443	425	320	360	360	268
	September	550	600	615	588	615	615	555

<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 flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

### Benchmark tariff rates

#### Calculating barge rate per ton:

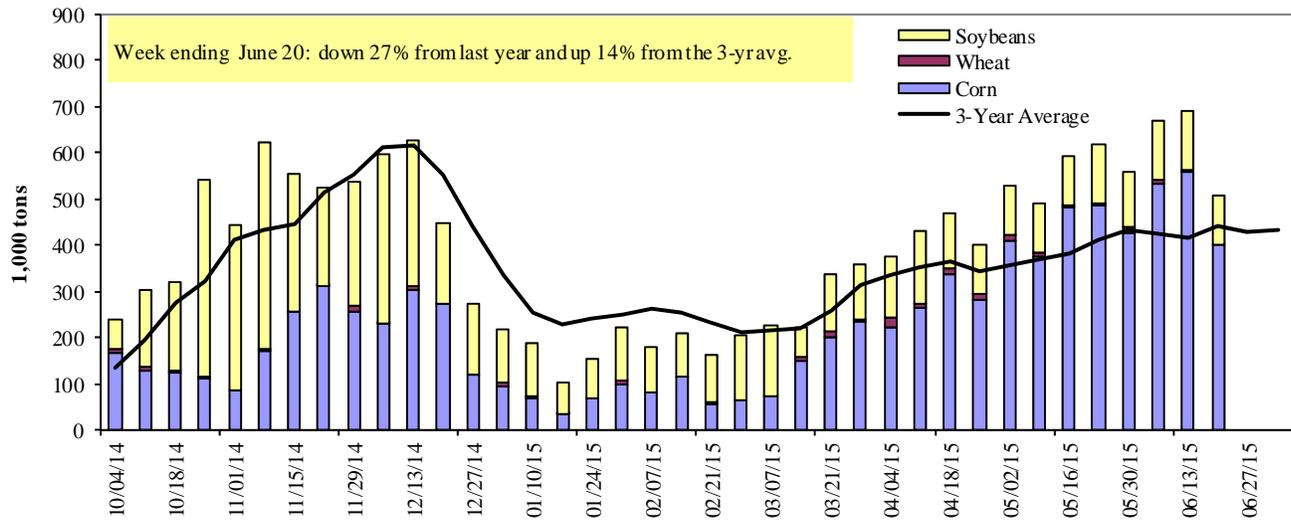
(Rate \* 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map.



Figure 10

**Barge Movements on the Mississippi River<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 06/20/2015	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	176	0	77	2	254
Winfield, MO (L25)	288	1	97	2	389
Alton, IL (L26)	367	1	108	0	476
Granite City, IL (L27)	402	0	106	0	509
<b>Illinois River (L8)</b>	117	0	25	0	142
<b>Ohio River (L52)</b>	122	4	25	0	151
<b>Arkansas River (L1)</b>	0	7	10	0	17
Weekly total - 2015	525	11	141	0	676
Weekly total - 2014	729	36	48	6	820
2015 YTD <sup>1</sup>	9,864	609	5,024	107	15,604
2014 YTD	10,775	897	4,221	106	15,999
2015 as % of 2014 YTD	92	68	119	101	98
Last 4 weeks as % of 2014 <sup>2</sup>	90	40	180	45	97
Total 2014	20,693	2,181	11,813	258	34,946

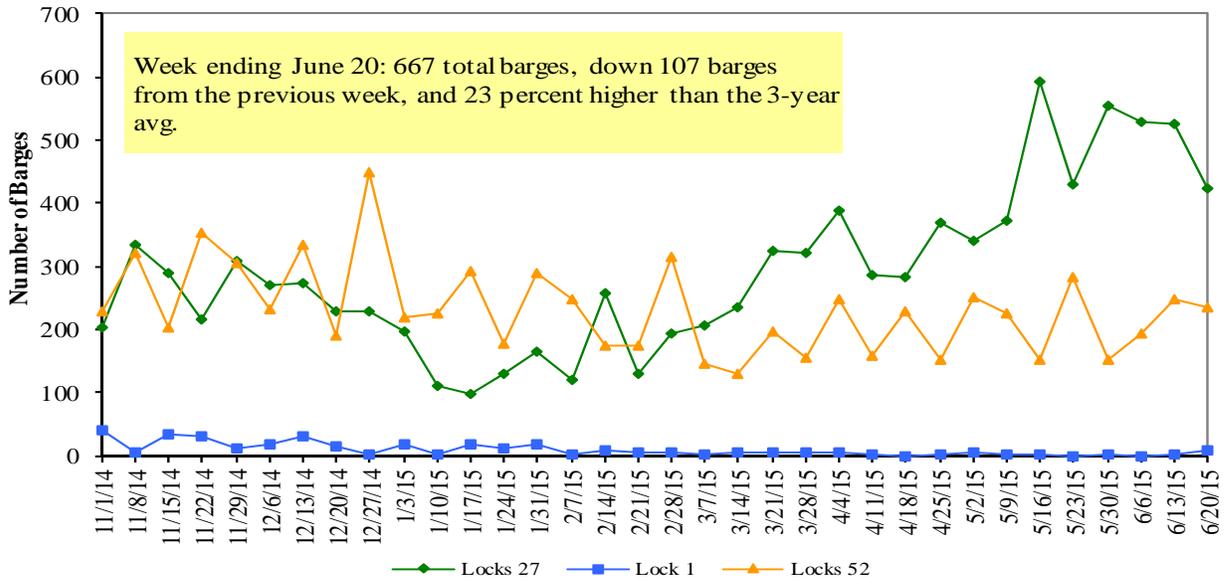
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

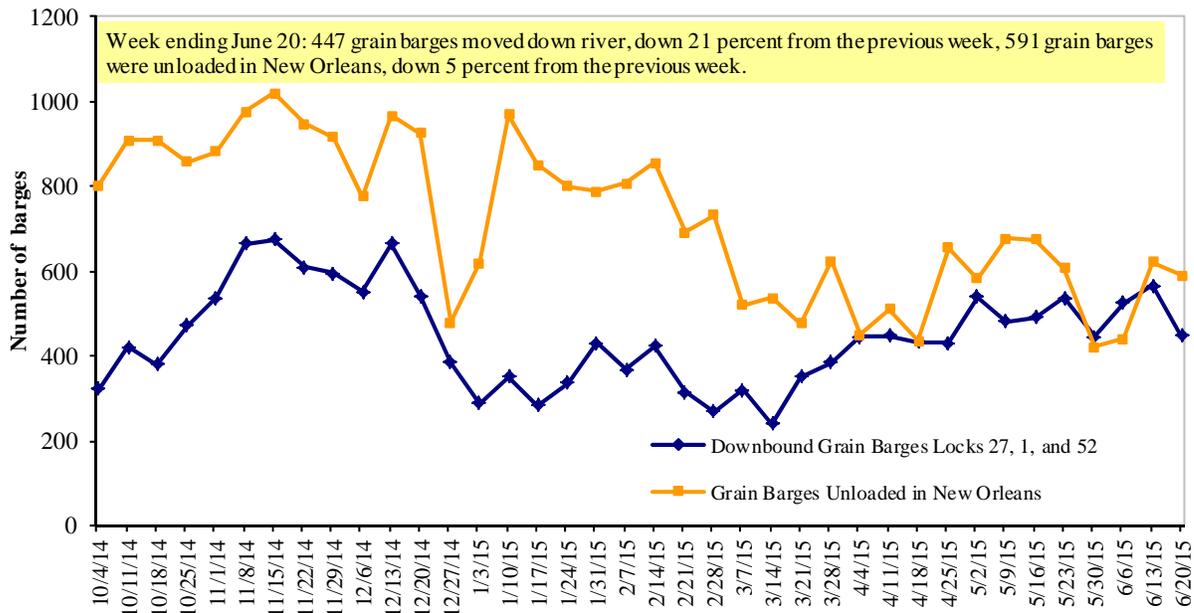
Source: U.S. Army Corps of Engineers

**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 6/22/2014 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.959	-0.009	-1.026
	New England	3.085	0.012	-1.017
	Central Atlantic	3.102	-0.015	-0.969
	Lower Atlantic	2.824	-0.010	-1.069
II	Midwest <sup>2</sup>	2.746	-0.008	-1.129
III	Gulf Coast <sup>3</sup>	2.755	-0.022	-1.058
IV	Rocky Mountain	2.799	-0.009	-1.114
V	West Coast	3.097	-0.004	-0.956
	West Coast less California	3.007	0.006	-0.966
	California	3.170	-0.012	-0.949
Total	U.S.	2.859	-0.011	-1.060

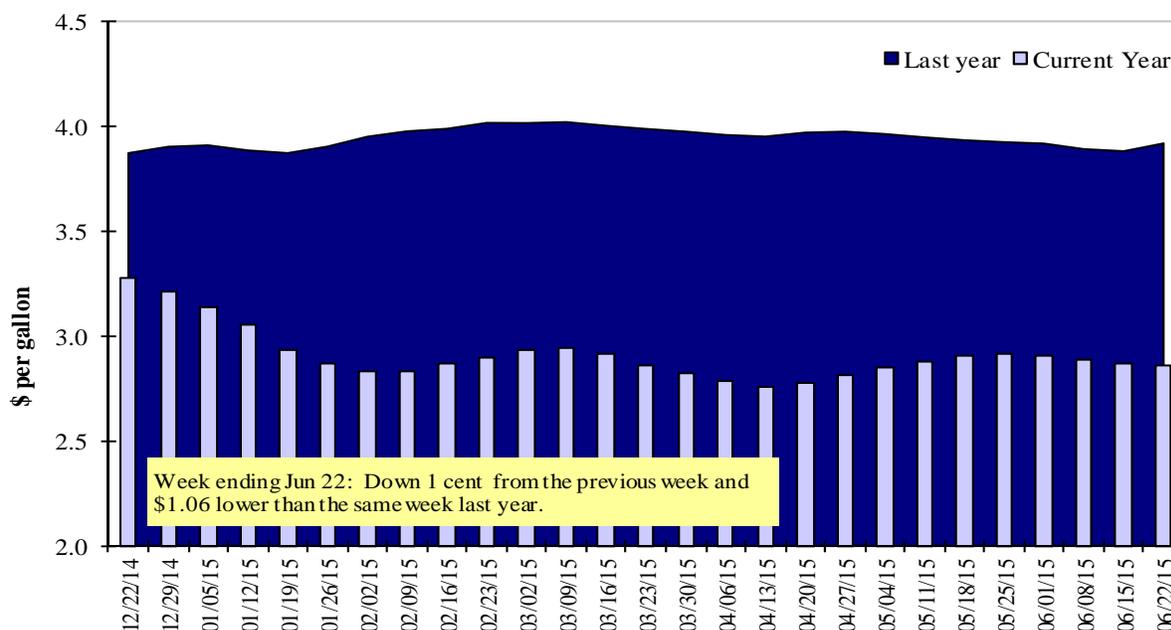
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
<b>Export Balances<sup>1</sup></b>									
6/11/2015	1,350	951	1,334	841	196	4,671	10,519	3,178	18,368
This week year ago	1,773	1,098	2,041	1,013	126	6,050	10,704	1,890	18,644
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2014/15 YTD	175	54	83	59	6	377	34,065	47,218	81,660
2013/14 YTD	299	96	369	87	2	852	35,963	43,268	80,083
YTD 2014/15 as % of 2013/14	59	56	22	68	300	44	95	109	102
Last 4 wks as % of same period 2013/14	49	50	41	53	91	48	104	180	94
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

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

<sup>2</sup> Shipped export sales to date; new marketing year in effect for wheat

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

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

Week ending 06/11/2015	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 3-year avg 2011-2013
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	586	10,633	10,570	1	10,079
Mexico	1,124	10,321	10,217	1	8,145
Korea	1	3,292	3,967	(17)	2,965
Colombia	0	3,992	3,093	29	3,461
Taiwan	0	1,902	1,832	4	1,238
<b>Top 5 Importers</b>	<b>1,710</b>	<b>30,140</b>	<b>29,680</b>	<b>2</b>	<b>25,887</b>
<b>Total US corn export sales</b>	<b>2,533</b>	<b>44,583</b>	<b>46,667</b>	<b>(4)</b>	<b>34,445</b>
% of Projected	5%	96%	96%		
Change from prior week	<b>200</b>	<b>627</b>	<b>109</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	68%	68%	64%		75%
<b>USDA forecast, June 2015</b>	<b>48,260</b>	<b>46,360</b>	<b>48,700</b>	<b>(5)</b>	
<b>Corn Use for Ethanol USDA forecast, June 2015</b>	<b>132,080</b>	<b>131,445</b>	<b>130,404</b>	<b>1</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 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 06/11/2015	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 3-yr avg. 2011-13
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	2,490	30,109	27,598	9	24,211
Mexico	401	3,265	3,222	1	2,971
Indonesia	0	1,701	2,267	(25)	1,895
Japan	205	2,014	1,867	8	1,750
Taiwan	9	1,241	1,179	5	1,055
<b>Top 5 importers</b>	<b>3,105</b>	<b>38,330</b>	<b>36,132</b>	<b>6</b>	<b>31,882</b>
<b>Total US soybean export sales</b>	<b>5,813</b>	<b>50,396</b>	<b>45,158</b>	<b>12</b>	<b>39,169</b>
% of Projected	12%	102%	101%		
Change from prior week	532	133	98		
<b>Top 5 importers' share of U.S. soybean export sales</b>	53%	76%	80%		<b>81%</b>
<b>USDA forecast, June 2015</b>	<b>48,310</b>	<b>49,260</b>	<b>44,820</b>	<b>10</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 06/11/2015	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 -			- 1,000 mt -
Japan	262	705	(63)	3,113
Mexico	450	872	(48)	2,807
Nigeria	554	401	38	2,512
Philippines	346	537	(35)	2,105
Brazil	143	696	(79)	2,091
Korea	377	377	0	1,273
Taiwan	188	164	15	1,007
Indonesia	46	231	(80)	751
Colombia	104	148	(29)	662
Thailand	84	99		618
<b>Top 10 importers</b>	<b>2,471</b>	<b>4,130</b>	<b>(40)</b>	<b>16,939</b>
<b>Total US wheat export sales</b>	<b>5,047</b>	<b>6,529</b>	<b>(23)</b>	<b>26,361</b>
% of Projected	20%	28%		
Change from prior week	316	373		
<b>Top 10 importers' share of U.S. wheat export sales</b>	49%	63%		64%
<b>USDA forecast, June 2015</b>	<b>25,170</b>	<b>23,270</b>	<b>8</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 06/18/15	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	119	182	65	5,244	6,127	86	67	80	12,436
Corn	354	183	194	4,607	4,154	111	89	134	7,781
Soybeans	0	11	0	4,054	4,486	90	76	9	12,887
<b>Total</b>	<b>473</b>	<b>376</b>	<b>126</b>	<b>13,905</b>	<b>14,768</b>	<b>94</b>	<b>77</b>	<b>95</b>	<b>33,104</b>
<b>Mississippi Gulf</b>									
Wheat	55	71	77	1,904	2,126	90	61	51	4,495
Corn	584	726	80	14,269	15,768	90	92	160	30,912
Soybeans	91	183	49	10,434	10,089	103	139	113	29,087
<b>Total</b>	<b>729</b>	<b>980</b>	<b>74</b>	<b>26,608</b>	<b>27,982</b>	<b>95</b>	<b>93</b>	<b>130</b>	<b>64,495</b>
<b>Texas Gulf</b>									
Wheat	26	125	21	1,894	3,217	59	63	45	6,120
Corn	0	27	0	269	346	78	45	227	580
Soybeans	0	0	n/a	210	257	82	n/a	0	949
<b>Total</b>	<b>26</b>	<b>152</b>	<b>17</b>	<b>2,373</b>	<b>3,820</b>	<b>62</b>	<b>59</b>	<b>51</b>	<b>7,649</b>
<b>Interior</b>									
Wheat	23	25	90	617	589	105	42	117	1,400
Corn	110	150	74	2,840	2,611	109	65	134	5,677
Soybeans	80	36	224	1,662	1,966	85	89	104	4,312
<b>Total</b>	<b>213</b>	<b>211</b>	<b>101</b>	<b>5,120</b>	<b>5,167</b>	<b>99</b>	<b>137</b>	<b>123</b>	<b>11,389</b>
<b>Great Lakes</b>									
Wheat	38	0	n/a	236	219	108	41	62	935
Corn	27	0	n/a	137	41	330	140	1,094	288
Soybeans	0	0	n/a	66	51	130	0	0	988
<b>Total</b>	<b>65</b>	<b>0</b>	<b>n/a</b>	<b>439</b>	<b>311</b>	<b>141</b>	<b>48</b>	<b>66</b>	<b>2,211</b>
<b>Atlantic</b>									
Wheat	44	2	2,842	237	154	154	61	79	553
Corn	10	1	689	73	372	20	12	38	816
Soybeans	13	3	363	911	986	92	207	133	2,119
<b>Total</b>	<b>67</b>	<b>6</b>	<b>1,032</b>	<b>1,221</b>	<b>1,512</b>	<b>81</b>	<b>42</b>	<b>74</b>	<b>3,487</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	304	405	75	10,133	12,432	82	65	63	25,939
Corn	1,085	1,087	100	22,196	23,292	95	89	149	46,054
Soybeans	183	234	78	17,338	17,836	97	119	89	50,342
<b>Total</b>	<b>1,572</b>	<b>1,726</b>	<b>91</b>	<b>49,666</b>	<b>53,559</b>	<b>93</b>	<b>85</b>	<b>106</b>	<b>122,335</b>

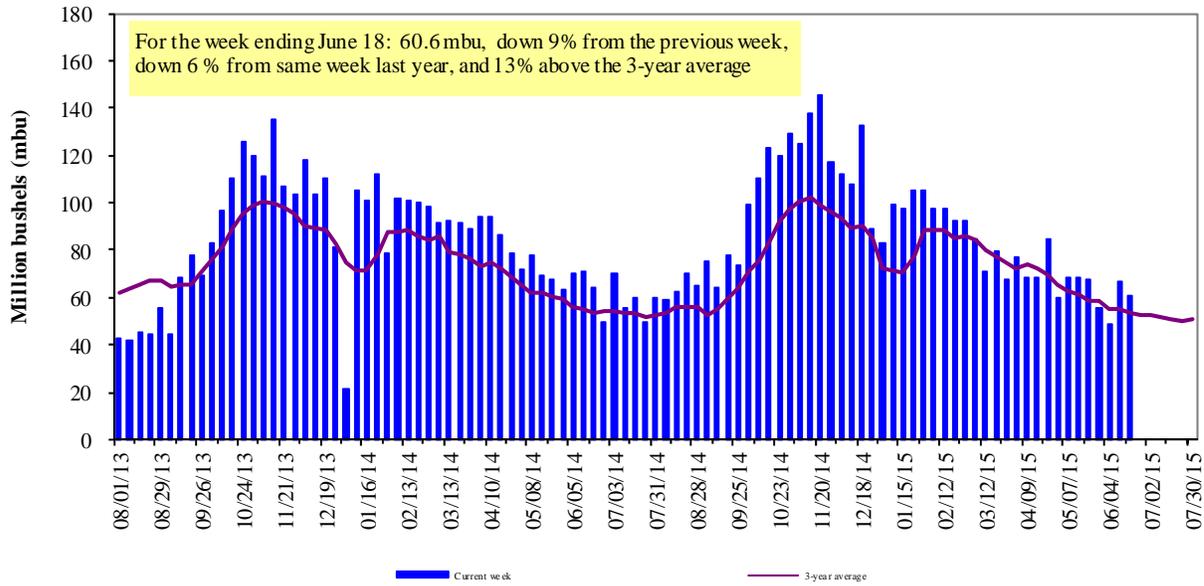
<sup>1</sup> Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)**

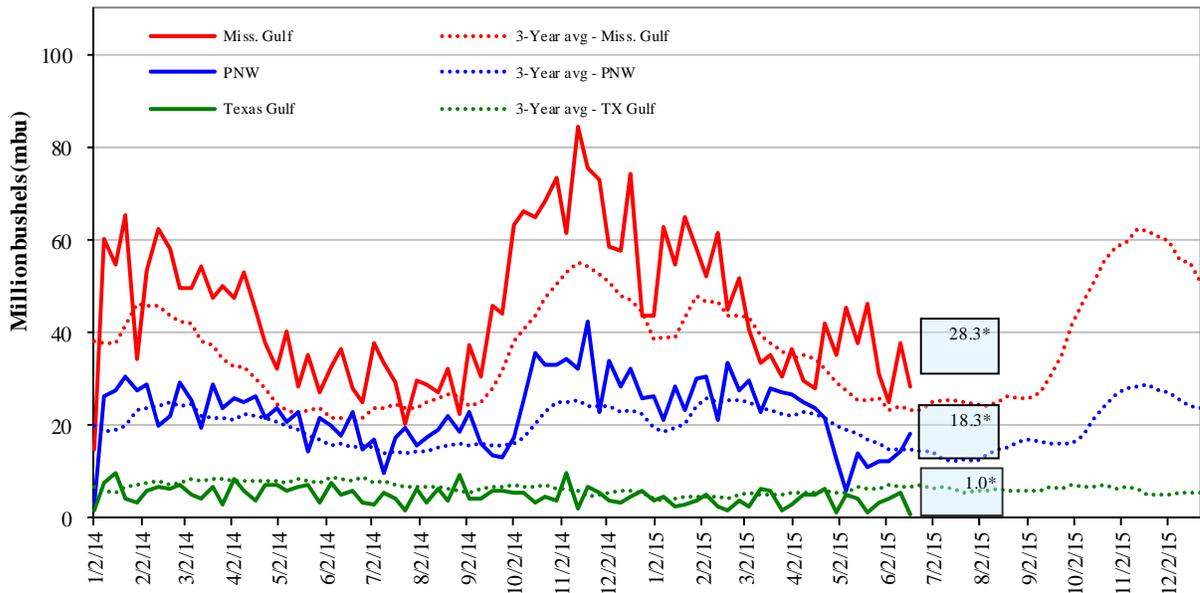


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

<b>June 18: % change from:</b>	<b>MSGulf</b>	<b>TX Gulf</b>	<b>U.S. Gulf</b>	<b>PNW</b>
Last week	down 25	down 83	down 33	up 28
Last year (same week)	up 1	down 84	down 14	down 20
3-yr avg. (4-wk mov. avg.)	up 22	down 86	down 3	up 38

# Ocean Transportation

Table 17

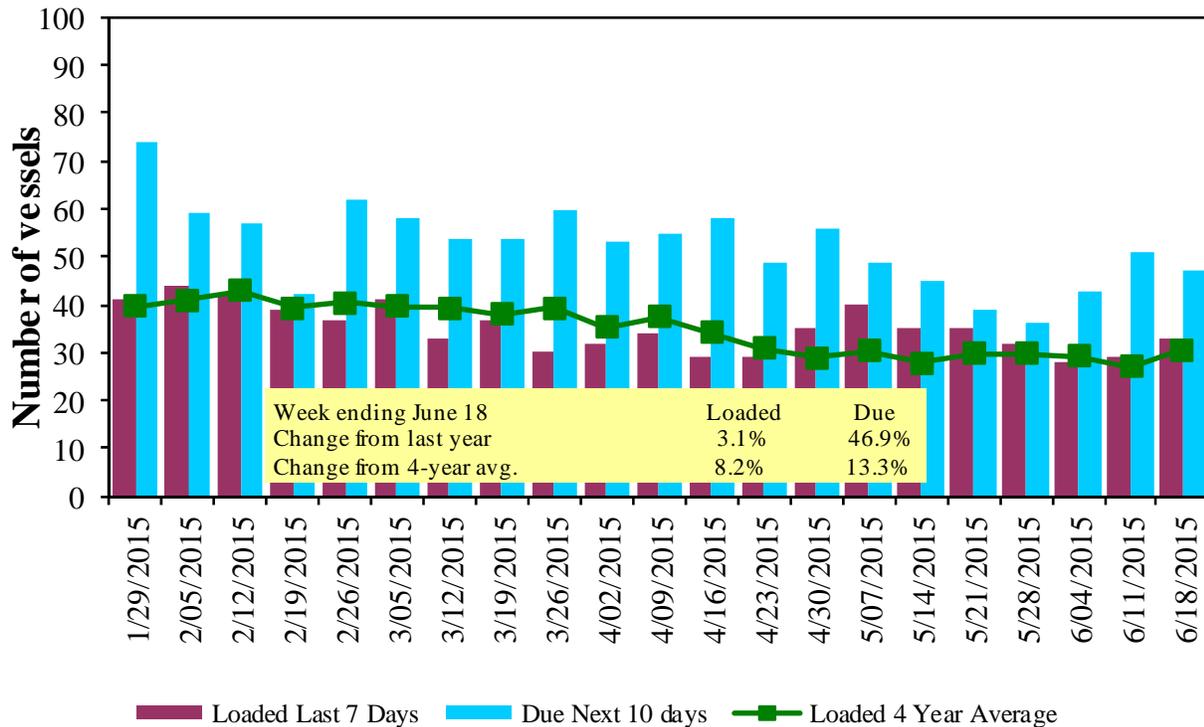
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded	Due next	In port	In port
		7-days	10-days		
6/18/2015	33	33	47	8	n/a
6/11/2015	41	29	51	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<sup>1</sup> Vessel Loading Activity**

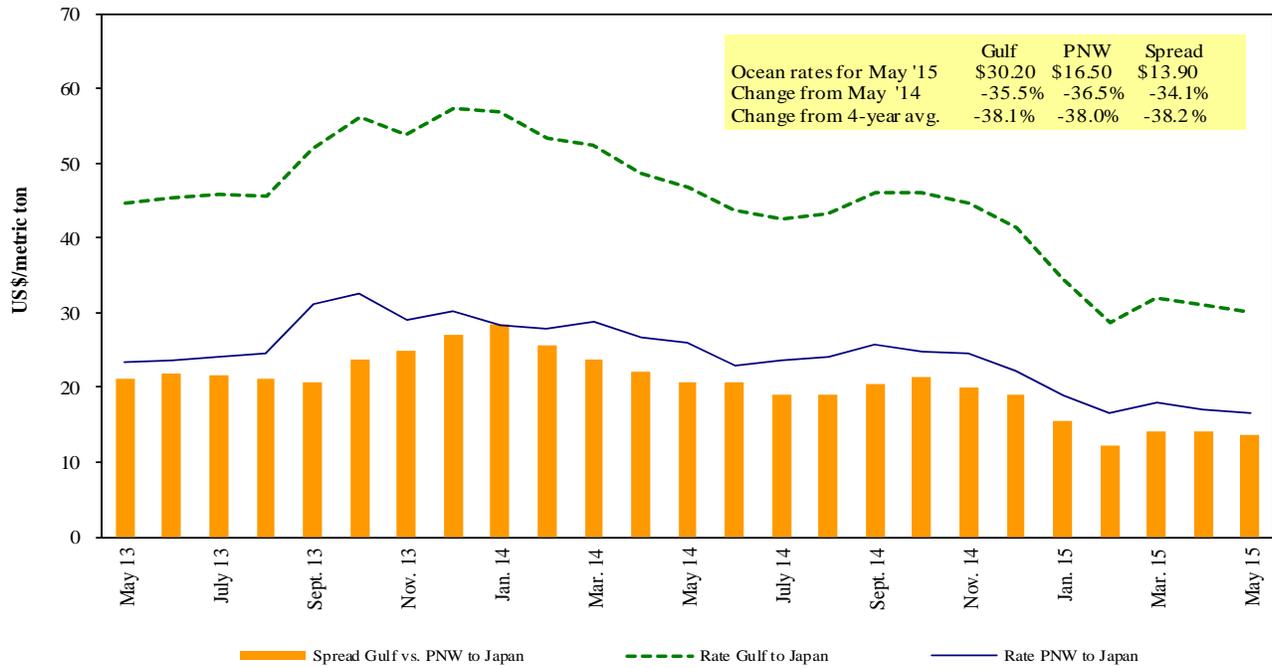


Source: Transportation & Marketing Programs/AMS/USDA

<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 6/20/2015**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Grain	Jun 1/10	50,000	35.75
U.S. Gulf	El Salvador <sup>1</sup>	Wheat	May 2/Jun 1	18,700	85.02
PNW	China	Heavy Grain	Jun 1/10	60,000	14.00
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.75
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.50
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.75
Brazil	China	Heavy Grain	Jun 10/20	60,000	22.25
Brazil	China	Heavy Grain	Jun 10/19	60,000	22.00
Brazil	China	Heavy Grain	Jun 5/14	60,000	22.25
Brazil	China	Heavy Grain	Jun 1/30	60,000	22.75
Brazil	China	Heavy Grain	Jun 1/10	66,000	21.00
Brazil	China	Grain	Jun 15/25	60,000	21.65
Canada	China	Heavy Grain	Jun 1/10	60,000	14.00
River Plate	Romania	Soybean Meal	May 20/25	20,000	36.00
River Plate	Vietnam	Corn	Jun 13/18	60,000	30.00
Thailand	Senegal	Rice Bggd	Jun 11/16	23,000	34.00
Uruguay	Syria	Soybean Meal	Jun 10/15	26,000	38.80

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

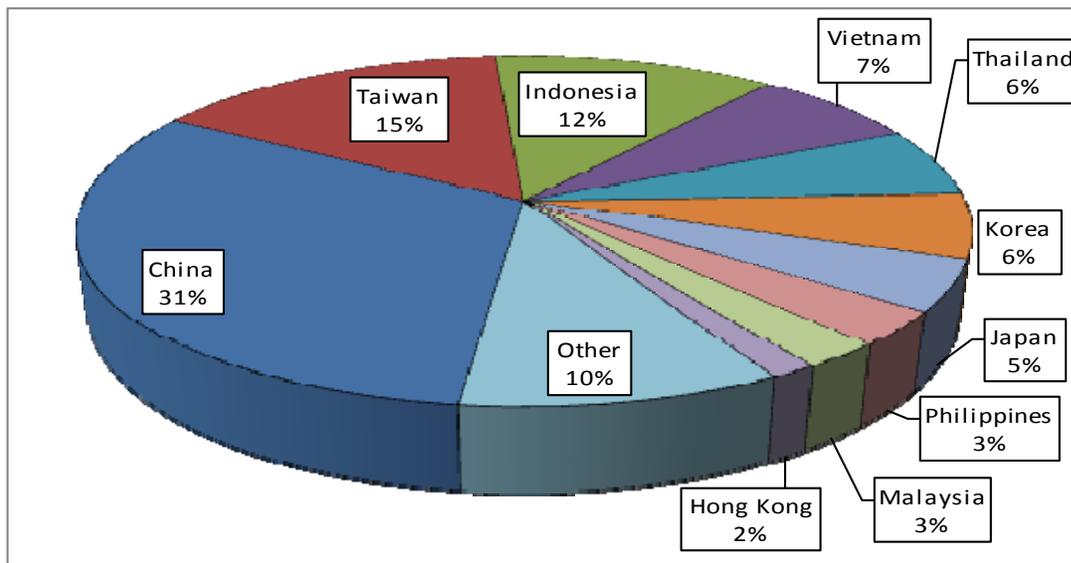
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

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

Figure 18

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

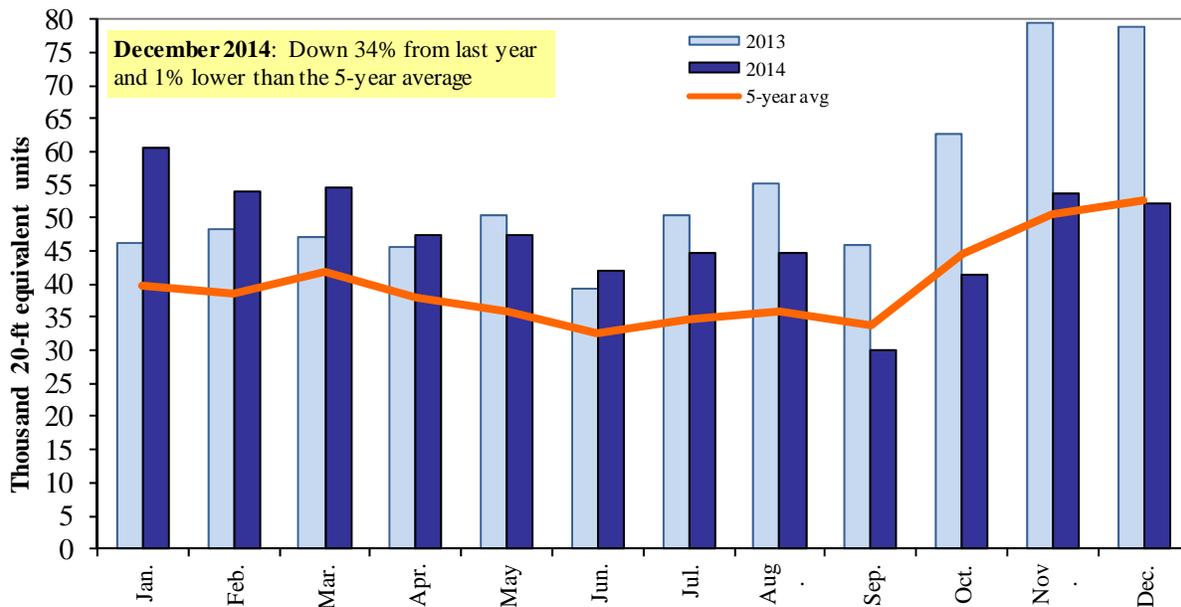


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. June 25, 2015. Web: <http://dx.doi.org/10.9752/TS056.06-25-2015>

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