



Grain Transportation Report

A weekly publication of the
 Transportation and Marketing Programs/Transportation Services Division
www.ams.usda.gov/GTR

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WEEKLY HIGHLIGHTS

Rain and Rock Removal Maintains Adequate River Levels

Significant rain and ongoing rock removal near Thebes, IL, have reduced immediate concerns for a traffic closure of the Mississippi River between St. Louis, MO, and Cairo, IL. The Thebes gage rose from 3.7 feet on January 9 to 13.2 feet on January 14. As of January 17, the gage is 12.2 feet. The extra water increases the vessel draft clearance over the submerged pinnacles. The U.S. Army Corps of Engineers anticipates the current surge in water levels will allow sufficient flows to sustain navigation through February 13. The rock pinnacle removal work will continue, and channel closures are scheduled for 16 hours between 6 a.m. and 10 p.m. each day; traffic will be allowed to pass at night.

Grain Inspections Rebound

For the week ending January 10, **total inspections of grain** (corn, wheat, and soybeans) from all major export regions totaled 1.59 million metric tons (mmt), up 27 percent from the past week but 29 percent below last year at this time. Grain inspections were 2 percent above the 4-week running average. Corn inspections (.235 mmt) jumped 46 percent from the past week as shipments to Asia and Mexico rebounded. Soybean (1.01 mmt) and wheat (.289 mmt) inspections increased 25 and 22 percent from the past week. Outstanding export sales of wheat and soybeans are also up from the same time last year (**Table 12**). Mississippi Gulf grain inspections (.955 mmt) increased 41 percent from the previous week because of increased shipments of corn and soybeans.

Drought Impacts Distillers Grains Market

The 2012 drought limited corn supplies and increased corn prices for the ethanol industry causing overall ethanol production to drop 8.5 percent throughout the year. Demand for distillers dried grains (DDG), an ethanol byproduct, was high due to lower U.S. corn production. The increase in corn prices through the summer and early fall pushed DDG prices to a record high of \$300 per ton, according to a recent article from DTN Grains. The article went on to say, "conditions resulting from last summer's drought may keep prices of DDG strong at least through next year's harvest." According to the Foreign Agricultural Service U.S. Trade Data, DDG exports January–November 2012 are 3 percent lower than the previous year. In 2011, about 50 percent of U.S. DDG exports are moved by ocean transportation; of that percentage, nearly 60 percent are moved in containers, making DDG the largest U.S. containerized grain export.

Snapshots by Sector

Rail

U.S. railroads originated 17,972 **carloads of grain** during the week ending January 5, up 35 percent from last week, down 14 percent from last year, and 5 percent lower than the 3-year average.

During the week ending January 10, average January non-shuttle **secondary railcar bids/offers per car** were \$12.50 above tariff, the same as last week, and \$44 higher than last year. Average shuttle bids/offers were \$62.50 below tariff, down \$64.50 from last week, and \$256.50 higher than last year.

Barge

During the week ending January 12, **barge grain movements** totaled 460,810 tons, 19 percent higher than the previous week but 23 percent lower than the same period last year.

During the week ending January 12, 255 grain barges **moved down river**, up 1 percent from last week; 509 grain barges were **unloaded in New Orleans**, up 19 percent from the previous week.

Ocean

During the week ending January 10, 32 **ocean-going grain vessels** were loaded in the Gulf, 14 percent less than the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days, 17 percent lower than the same period last year.

During the week ending January 11, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$46.50 per mt, 4 percent more than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$27 per mt, 13 percent higher than the previous week.

Fuel

During the week ending January 14, U.S. average **diesel fuel prices** fell 2 cents from the previous week to \$3.89 per gallon—4 cents higher than the same week last year.

Containerized Grain Exports

Containerized grain exports to Asia in October totaled more than 44,700 20-foot equivalent units—5 percent lower than the previous year, 22 percent higher than the 4-year average, and 36.8 percent higher than September movements.

Feature Article/Calendar

Grain Transportation Update

Corn Pulls Down Grain Production and Use

The January 2013 *World Agricultural Supply and Demand Estimates* (WASDE), projects production of major grains at 16.1 billion bushels, down 8 percent from last year due to the drought. Grain and oilseed exports are projected to be 3.3 billion bushels, which is down 610 million bushels (15.4 percent) from 2011/12. Corn is responsible for almost all of the decreased grain and oilseed exports (down 593 million bushels or 38.4 percent) while soybeans absorb the rest (down 17 million bushels or 1.25 percent). Wheat exports are projected to remain the same as during 2011/12.

Drought Causes Navigation Issues

Since late spring, waterway traffic on the Mississippi River System has been frequently disrupted by drought-induced low water. Grain barge movements were slowed by narrower navigation channels, dredging activities, repair work at Mississippi River Locks 27, and temporary river closures caused by grounded vessels. In addition, grain barge tonnages were reduced by light-loading of barges. Since the second half of December, the U.S. Army Corps of Engineers (Corps) has been removing rock formations that posed navigation hazards near Thebes and Grand Tower, IL. About 41 percent of the work at Thebes is completed. The Grand Tower project has not started yet, but the work is not as extensive there. The Coast Guard closes the river to traffic from 6:00 am to 10:00 pm for the rock removal process and allows traffic to transit the area during an 8-hour period during the night. At different times during 2012, low water affected navigation on all three rivers, especially the middle portion of the Mississippi River between St. Louis and Cairo.

Table 2 shows that weekly grain barge tonnages have been below average for the second, third, and fourth quarter of this year. Typically, the fourth quarter has the highest weekly movements and the first quarter has the lowest. In 2012, this pattern was reversed as deteriorating navigation conditions began to limit barge traffic in the second quarter. Overall, total movements in 2012 were 12 percent less than the 3-year average. Tables 2, 3 and 4 show quarterly average weekly barge shipments, calculated from the weekly data reported in the GTR Table 10. The barge data is for grain tonnages passing through Mississippi River Locks 27 (near St. Louis, MO), Ohio River Locks and Dam 52 (near Cairo, IL) and Arkansas River Lock and Dam 1 (10 miles from the Mississippi River). These points on the River are selected because they are the last or near the last locks on each river and give a good indication of weekly traffic volumes on specific portions of the river. Grain does originate below the locks in locations such as Memphis, TN; however, no single source of that data is available.

Table 3 shows the significant drop in the third and fourth quarter for corn barge shipments. Fourth quarter decreases for corn were 51 percent lower than the 3-year average and 55 percent lower than last year. Total corn movements were 32 percent lower than the 3-year average. Typically, corn

	Corn	Soybeans	Wheat	Total	Y/Y
United States 2012/13 (Projected)					
Production	10,780	3,015	2,269	16,064	-8.0%
Exports	950	1,345	1,050	3,345	-15.4%
Domestic Use	10,317	1,725	1,375	13,417	-3.9%
Ending Stocks/Use	5.3%	4.4%	29.5%		
2011/12 (Estimated)					
Production	12,360	3,094	1,999	17,453	-2.9%
Exports	1,543	1,362	1,050	3,955	-14.5%
Domestic Use	10,985	1,793	1,182	13,960	-1.2%
Ending Stocks/Use	7.9%	5.4%	33.3%		
2010/11					
Production	12,447	3,329	2,207	17,983	
Exports	1,834	1,501	1,289	4,624	
Domestic Use	11,221	1,779	1,128	14,128	
Ending Stocks/Use	8.6%	6.6%	35.7%		

Table 2. Average Weekly Grain Barge Shipments by Quarter, and Annual Total 2009-12

All Grain Year	Average Weekly Shipments				Annual Total
	1st quarter	2d quarter	3d quarter	4th quarter	
	1,000 tons				
2009	567	763	664	761	35,920
2010	576	692	630	762	34,584
2011	570	510	508	746	30,355
2012	631	578	449	613	29,523
3 yr avg	571	655	601	756	33,620

Source: U.S. Army Corps of Engineers

Table 2 shows that weekly grain barge tonnages have been below average for the second, third, and fourth quarter of this year. Typically, the fourth quarter has the highest weekly movements and the first quarter has the lowest. In 2012, this pattern was reversed as deteriorating navigation conditions began to limit barge traffic in the second quarter. Overall, total movements in 2012 were 12 percent less than the 3-year average. Tables 2, 3 and 4 show quarterly average weekly barge shipments, calculated from the weekly data reported in the GTR Table 10. The barge data is for grain tonnages passing through Mississippi River Locks 27 (near St. Louis, MO), Ohio River Locks and Dam 52 (near Cairo, IL) and Arkansas River Lock and Dam 1 (10 miles from the Mississippi River). These points on the River are selected because they are the last or near the last locks on each river and give a good indication of weekly traffic volumes on specific portions of the river.

Table 3. Average Weekly Corn Barge Shipments by Quarter, and Annual Total 2009-12

Corn Year	Average Weekly Shipments				Annual Total
	1st quarter	2d quarter	3d quarter	4th quarter	
	1,000 tons				
2009	363	532	513	394	23,424
2010	332	548	491	364	22,551
2011	331	385	376	440	19,921
2012	354	365	226	196	14,837
3 yr avg	342	488	460	399	21,965

Source: U.S. Army Corps of Engineers

contributes 65 percent to total grain movements by barge using a 3-year average. In 2012, barge movements of corn as the percentage of all grain dropped to 50 percent.

Table 4 shows a significant increase in soybean tonnages by barge for each quarter in 2012 as compared to the 3-year average or to 2010 and 2011. The fourth quarter increase for soybeans was 21 percent higher than average and 42 percent higher than last year. Total soybean movements for 2012 were 29 percent higher than the 3-year average. Typically, soybeans represent about 29 percent of total movements using a 3-year average. However, in 2012, soybeans were 42 percent of total movements.

Table 4. Average Weekly Soybean Barge Shipments by Quarter, and Annual Total 2009-12

Soybeans Year	Average Weekly Shipments				Annual Total
	1st quarter	2d quarter	3d quarter	4th quarter	
	1,000 tons				
2009	179	186	105	335	10,465
2010	217	111	98	371	10,349
2011	210	88	82	278	8,552
2012	239	160	180	395	12,662
3 yr avg	202	128	95	328	9,789

Source: U.S. Army Corps of Engineers

Graincar Deliveries to Mississippi Gulf Ports Increase

Graincar deliveries to Mississippi Gulf Ports during the last 5 weeks ending January 2, were 5,944 carloads higher than during the same period last year, mainly due to low water conditions on the Mississippi River (Table 5). Deliveries to the S. Atlantic and East Gulf also increased, mainly due to higher than normal soybean exports. Deliveries to the Pacific Northwest during the last 5 weeks have been unusually weak this year, down by 7,282 railcars compared to last year.

Even with diversion of grain from barge to rail, total railcar loadings remained low during the fourth quarter of 2012,

mainly due to reduced corn production and exports. There were 250,581 grain car loadings for Class I railroads, down 10.6 percent from the same period in 2011 (280,281) and 16.6 percent less than the 3-year average (300,523).

Table 5: Rail Grain Deliveries to Port (carloads)

Sum of 5 week period ending	Mississippi Gulf	Texas Gulf	S. Atlantic & East Gulf	Pacific Northwest
1/2/2013	6,257	3,682	2,890	17,642
1/4/2012	313	3,282	843	24,924
Difference in carloads	5,944	400	2,047	(7,282)
Difference in tons	653,840	44,000	225,170	(801,020)
3 year average for the period	3,144	6,341	2,205	20,523
Difference in carloads	3,113	(2,659)	685	(2,881)
Difference in tons	342,393	(292,453)	75,350	(316,910)

Source: Transportation and Marketing Programs, Agricultural Marketing Service, USDA

Excess Vessel Supply and Weak Global Freight Demand Kept Ocean Freight Low in 2012

Ocean freight rates for shipping bulk commodities, including grains, were moderate throughout 2012 because of excess vessel supply and weak global demand for shipping bulk commodities. During the fourth quarter, the cost of shipping grains from the U.S. Gulf to Japan was \$46.80 per mt, with an annual average of \$49.24 per mt. The cost of shipping from PNW to Japan was \$25.90 per mt during the quarter, and the yearly average was \$26.94 per mt. The yearly average for the U.S. Gulf to Japan route was 10 percent lower than last year, and PNW to Japan route was 14 percent lower than the previous year.

Diesel Fuel Prices End 2012 Below Average

Fourth quarter U.S. average diesel fuel prices were the highest quarterly average for 2012 at \$4.02 per gallon, 4 cents above the yearly average. Weekly prices were up and down during the quarter, but cumulatively fell 16 cents per gallon. Soft crude oil prices kept December diesel prices on a downward trend. They did not, however, see the significant fall in December that regular gasoline prices experienced because of continued tight market conditions, strong demand for diesel fuel exports, and distillate inventories well below a five-year average. The Energy Information Administration forecasts falling crude prices will help diesel fuel retail prices drop to an average of \$3.87 per gallon in 2013 and \$3.78 per gallon in 2014. During the week ending January 14, U.S. average diesel fuel prices fell another 2 cent from the previous week to \$3.89 per gallon—4 cents higher than the same week last year. GTRContactUs@ams.usda.gov

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
01/16/13	261	234	209	193	208	191
01/09/13	262	233	211	207	199	170

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)

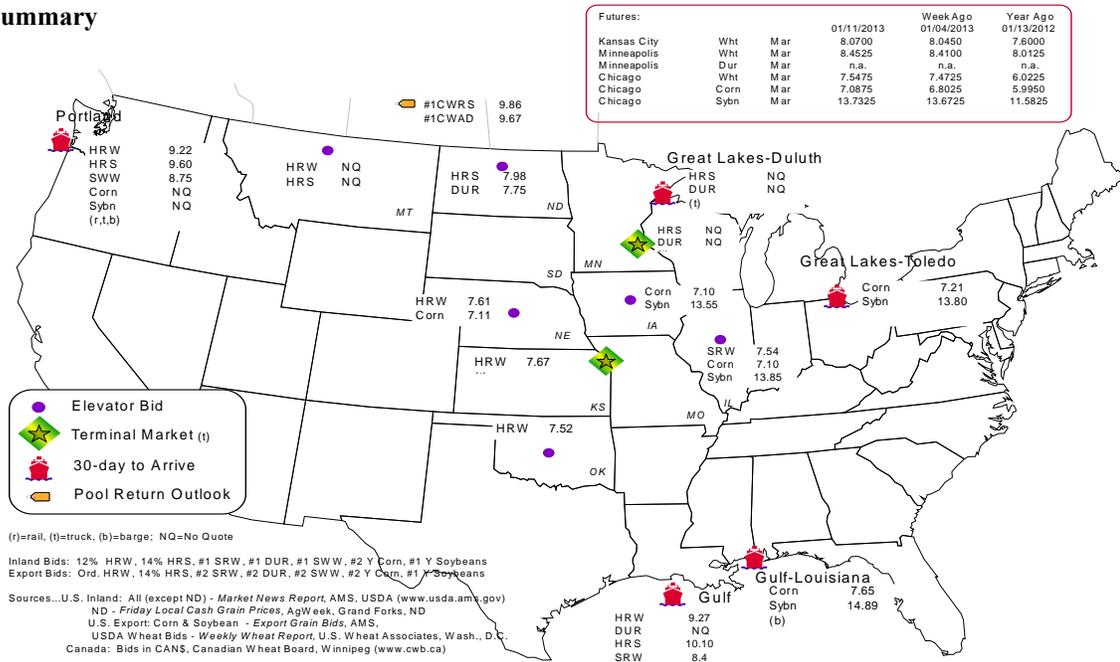
Commodity	Origin--Destination	1/11/2013	1/4/2013
Corn	IL--Gulf	-0.55	-0.61
Corn	NE--Gulf	-0.54	-0.61
Soybean	IA--Gulf	-1.34	-1.45
HRW	KS--Gulf	-1.60	-1.60
HRS	ND--Portland	-1.62	-1.51

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

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
01/09/2013 ^p	1,199	374	4,455	709	6,737	01/05/13	916
01/02/2013 ^r	1,015	747	3,690	893	6,345	12/29/12	856
2013 YTD ^r	2,214	1,121	8,145	1,602	13,082	2013 YTD	916
2012 YTD ^r	173	1,611	9,557	735	12,076	2012 YTD	2,586
2013 YTD as % of 2012 YTD	1,280	70	85	218	108	% change YTD	35
Last 4 weeks as % of 2012 ²	2,173	101	82	187	112	Last 4wks % 2012	44
Last 4 weeks as % of 4-year avg. ²	228	55	117	111	115	Last 4wks % 4 yr	63
Total 2012	22,604	40,780	199,419	26,261	287,462	Total 2011	97,118
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2010	90,175

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2011 and prior 4-year average.

³ Cross-border weekly data is approximately 15 percent below weekly AAR carloads received by Mexican railroads to reflect within switching between KCSM and FerroMe

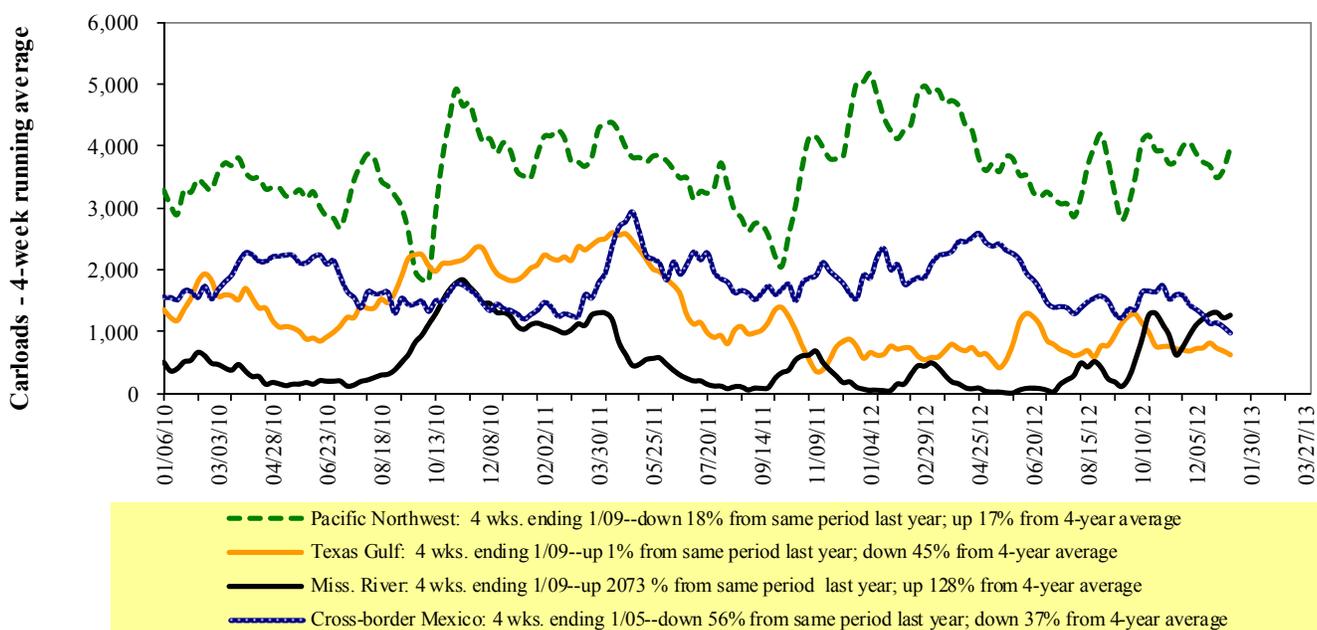
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

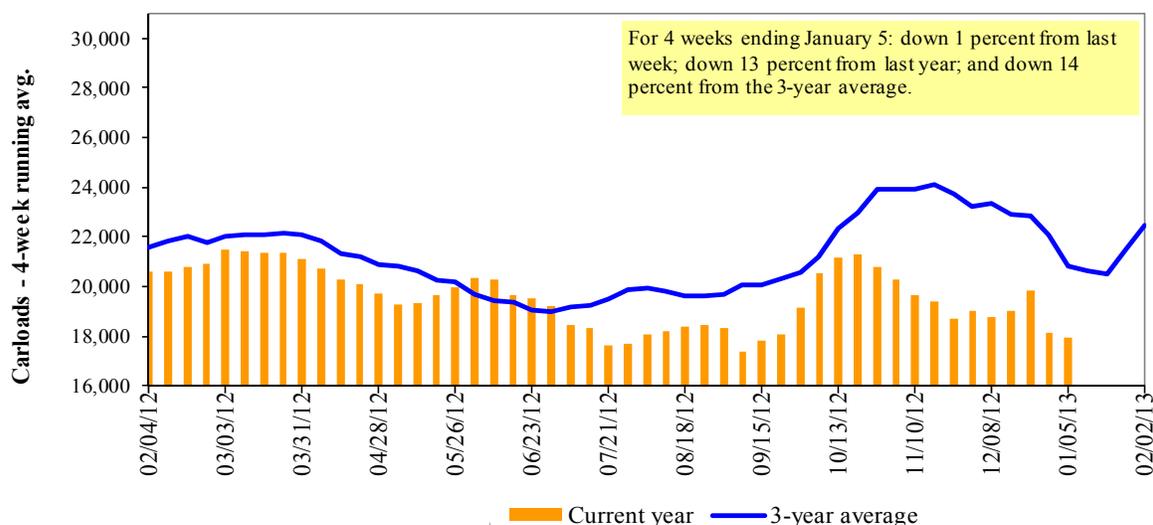
Table 4

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
01/05/13	1,553	2,699	9,793	230	3,697	17,972	3,693	5,202
This week last year	2,222	3,110	10,235	426	4,860	20,853	3,560	4,561
2013 YTD	1,553	2,699	9,793	230	3,697	17,972	3,693	5,202
2012 YTD	2,222	3,110	10,235	426	4,860	20,853	3,560	4,561
2013 YTD as % of 2012 YTD	70	87	96	54	76	86	104	114
Last 4 weeks as % of 2012	65	91	94	81	78	87	105	110
Last 4 weeks as % of 3-yr avg. ¹	67	91	97	72	73	86	111	121
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

¹As a percent of the same period in 2009 and 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

Week ending	Delivery period							
	Jan-13	Jan-12	Feb-13	Feb-12	Mar-13	Mar-12	Apr-13	Apr-12
BNSF ³								
COT grain units	5	no bids	0	no bids				
COT grain single-car ⁵	0 . . 2	0 . . 20	0	no bids	no bids	no bids	0	6
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.

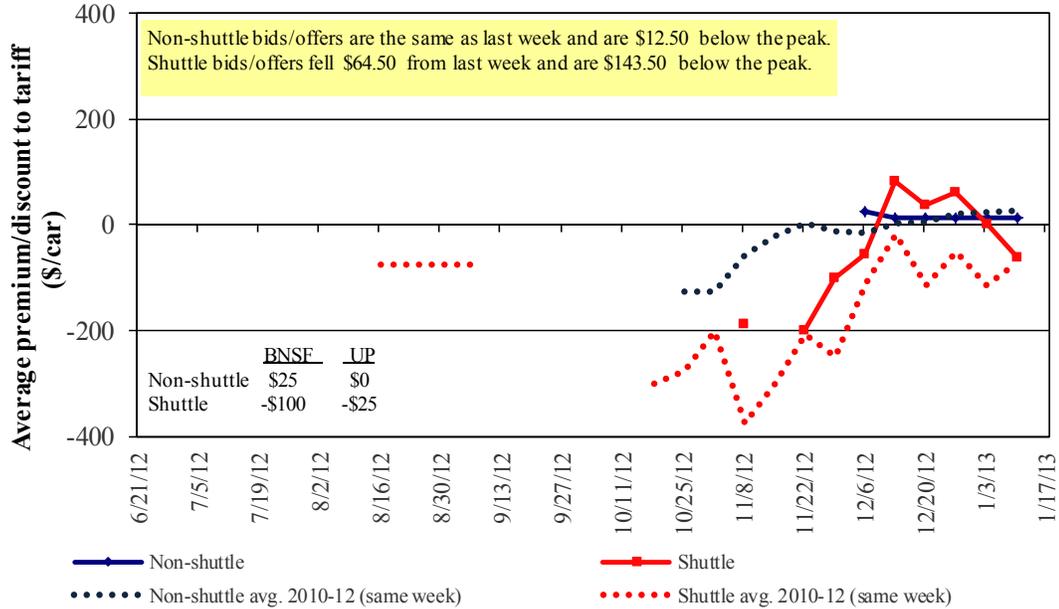
⁵Range is shown because average is not available. Not available = n/a.

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 January 2013, Secondary Market

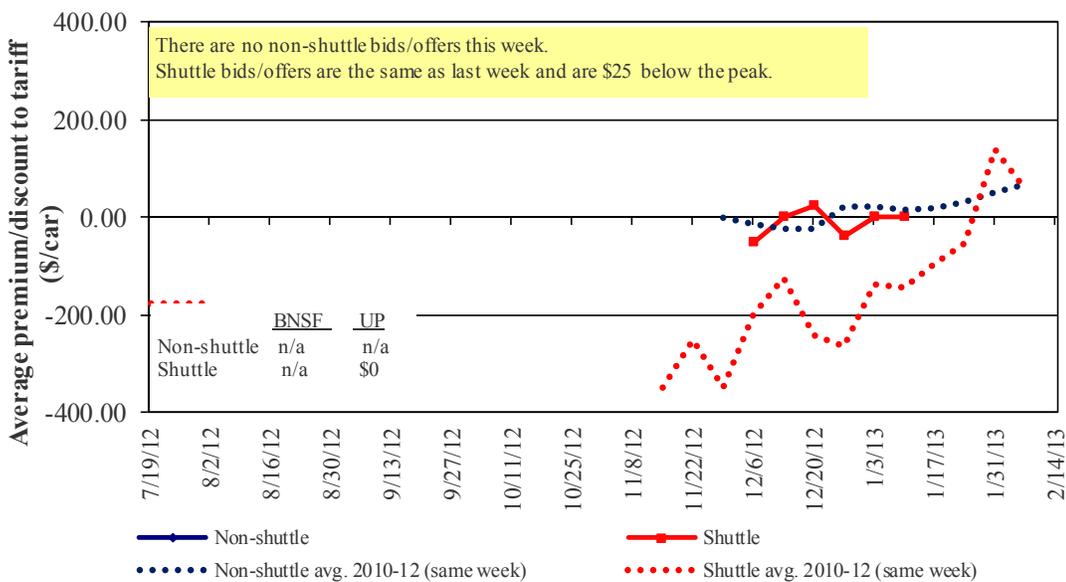


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in February 2013, Secondary Market

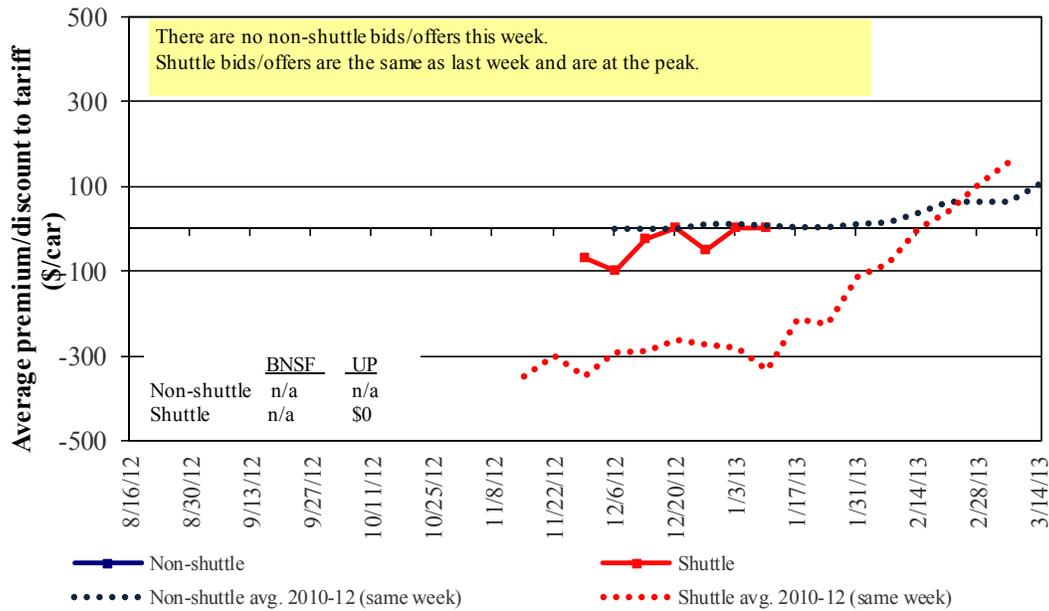


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in March 2013, 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)¹

Week ending	Delivery period					
	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13
Non-shuttle						
BNSF-GF	25	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	88	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	-	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(100)	n/a	n/a	n/a	n/a	n/a
Change from last week	(29)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	313	n/a	n/a	n/a	n/a	n/a
UP-Pool	(25)	-	-	n/a	n/a	n/a
Change from last week	(100)	-	-	n/a	n/a	n/a
Change from same week 2011	200	200	250	n/a	n/a	n/a

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

² 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 Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
1/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$197	\$33.18	\$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$113	\$36.31	\$0.99	14
	Wichita, KS	Los Angeles, CA	\$6,026	\$581	\$65.61	\$1.79	5
	Wichita, KS	New Orleans, LA	\$3,645	\$347	\$39.64	\$1.08	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$477	\$60.08	\$1.64	3
	Northwest KS	Galveston-Houston, TX	\$3,912	\$380	\$42.62	\$1.16	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$529	\$46.09	\$1.25	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$392	\$34.78	\$0.95	2
	Toledo, OH	Raleigh, NC	\$4,508	\$442	\$49.15	\$1.34	13
	Des Moines, IA	Davenport, IA	\$2,006	\$83	\$20.75	\$0.56	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$332	\$42.22	\$1.15	15
	Indianapolis, IN	Knoxville, TN	\$3,354	\$213	\$35.42	\$0.96	17
	Des Moines, IA	Little Rock, AR	\$3,154	\$244	\$33.75	\$0.92	3
	Des Moines, IA	Los Angeles, CA	\$5,065	\$711	\$57.36	\$1.56	2
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,674	\$425	\$40.70	\$1.11	5
	Toledo, OH	Huntsville, AL	\$3,575	\$314	\$38.62	\$1.05	2
	Indianapolis, IN	Raleigh, NC	\$4,578	\$445	\$49.88	\$1.36	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$213	\$34.55	\$0.94	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$392	\$39.64	\$1.08	5
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$4,639	\$334	\$49.39	\$1.34	40
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$260	\$38.67	\$1.05	15
	Chicago, IL	Albany, NY	\$3,771	\$414	\$41.56	\$1.13	3
	Grand Forks, ND	Portland, OR	\$5,061	\$578	\$55.99	\$1.52	7
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$602	\$66.37	\$1.81	6
	Northwest KS	Portland, OR	\$4,880	\$624	\$54.65	\$1.49	3
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$703	\$54.65	\$1.49	0
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$644	\$53.67	\$1.46	0
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$392	\$32.98	\$0.90	2
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$375	\$36.60	\$1.00	0
	Des Moines, IA	Amarillo, TX	\$3,510	\$307	\$37.90	\$1.03	2
	Minneapolis, MN	Tacoma, WA	\$4,800	\$698	\$54.59	\$1.49	0
	Council Bluffs, IA	Stockton, CA	\$4,200	\$722	\$48.87	\$1.33	0
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,320	\$644	\$59.23	\$1.61	5
	Minneapolis, MN	Portland, OR	\$5,330	\$703	\$59.91	\$1.63	6
	Fargo, ND	Tacoma, WA	\$5,230	\$573	\$57.62	\$1.57	6
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$452	\$43.72	\$1.19	6
	Toledo, OH	Huntsville, AL	\$2,750	\$314	\$30.42	\$0.83	3
	Grand Island, NE	Portland, OR	\$4,960	\$638	\$55.60	\$1.51	9

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		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$6,762	\$611	\$75.34	\$2.05	-12
	OK	Cuautitlan, EM	\$6,552	\$742	\$74.53	\$2.03	-2
	KS	Guadalajara, JA	\$7,444	\$717	\$83.39	\$2.27	-2
	TX	Salinas Victoria, NL	\$3,553	\$280	\$39.16	\$1.06	-3
Corn	IA	Guadalajara, JA	\$7,699	\$843	\$87.28	\$2.21	-1
	SD	Celaya, GJ ⁵	\$7,356	\$800	\$83.33	\$2.11	n/a
	NE	Queretaro, QA	\$7,153	\$749	\$80.74	\$2.05	1
	SD	Salinas Victoria, NL	\$5,700	\$608	\$64.45	\$1.64	1
	MO	Tlalnepantla, EM	\$6,592	\$728	\$74.79	\$1.90	4
	SD	Torreon, CU	\$6,522	\$670	\$73.48	\$1.86	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$711	\$84.72	\$2.30	6
	NE	Guadalajara, JA	\$8,134	\$814	\$91.42	\$2.49	1
	IA	El Castillo, JA	\$8,555	\$795	\$95.53	\$2.60	4
	KS	Torreon, CU	\$6,651	\$505	\$73.11	\$1.99	2
Sorghum	TX	Guadalajara, JA	\$6,464	\$520	\$71.36	\$1.81	-2
	NE	Celaya, GJ ⁵	\$6,997	\$726	\$78.90	\$2.00	n/a
	KS	Queretaro, QA	\$6,815	\$456	\$74.29	\$1.89	5
	NE	Salinas Victoria, NL	\$5,438	\$534	\$61.01	\$1.55	6
	NE	Torreon, CU	\$6,153	\$596	\$68.96	\$1.75	0

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

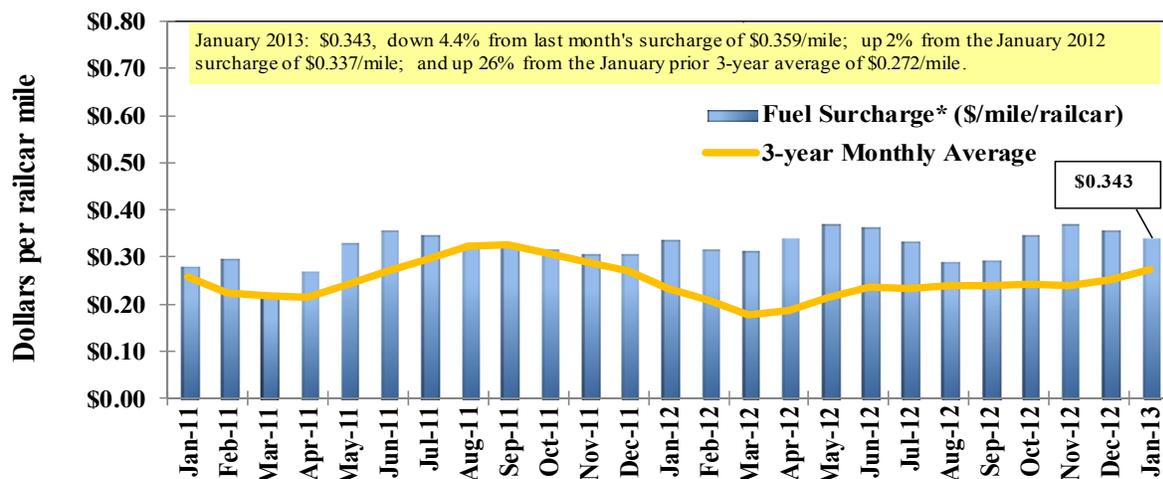
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

⁵Beginning 11/1/12, Celaya, GJ, replaced Penjamo, GJ, as the destination.

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.

* 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.

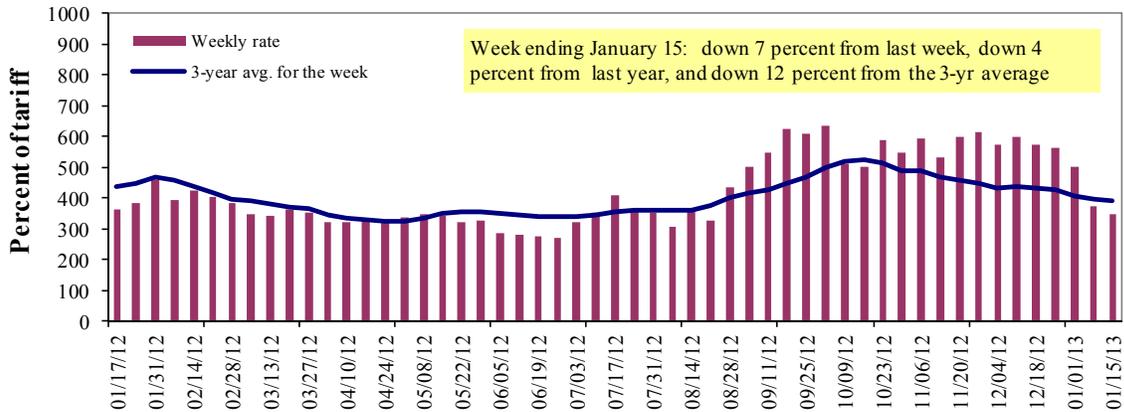
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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^{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

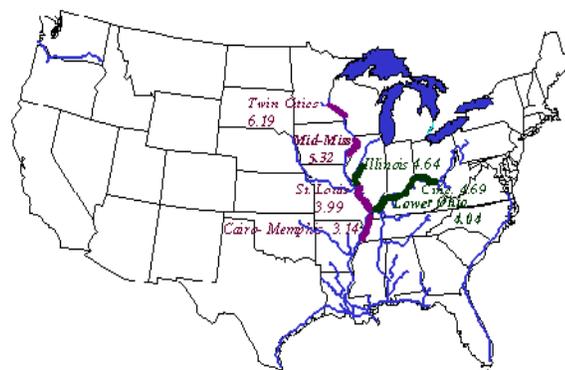
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	1/15/2013	-	-	348	283	248	248	195
	1/8/2013	-	-	373	340	275	275	193
\$/ton	1/15/2013	-	-	16.15	11.29	11.63	10.02	6.12
	1/8/2013	-	-	17.31	13.57	12.90	11.11	6.06
Current week % change from the same week:								
	Last year	-	-	-4	-5	-27	-27	-19
	3-year avg. ²	-	-	-12	-5	-30	-30	-27
Rate¹	February	-	-	345	275	250	250	195
	April	405	350	338	275	250	250	195

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - closed for winter or no rates

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



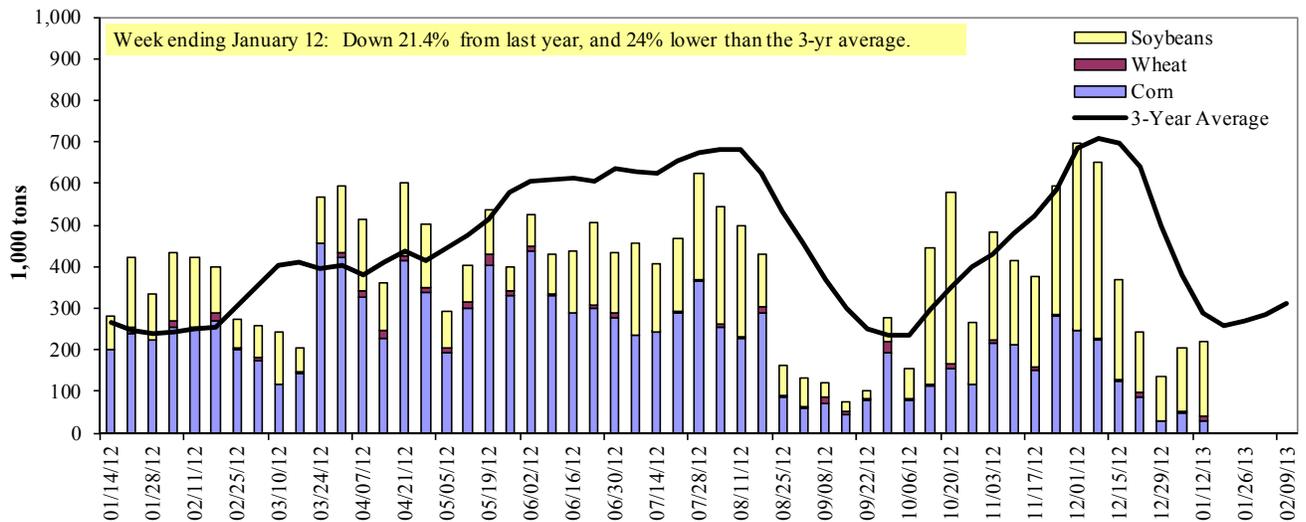
Calculating barge rate per ton:

(Index * 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 (see figure 9).

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)

Week ending 1/12/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	25	0	25
Alton, IL (L26)	29	13	161	0	204
Granite City, IL (L27)	29	13	179	0	221
Illinois River (L8)	65	13	117	0	195
Ohio River (L52)	19	33	163	2	218
Arkansas River (L1)	0	8	14	0	22
Weekly total - 2013	48	55	356	2	461
Weekly total - 2012	339	25	235	0	599
2013 YTD ¹	109	76	658	5	849
2012 YTD	593	46	468	0	1,107
2013 as % of 2012 YTD	18	167	141	-	77
Last 4 weeks as % of 2012 ²	24	27	122	375	70
Total 2012	14,837	1,794	12,663	229	29,523

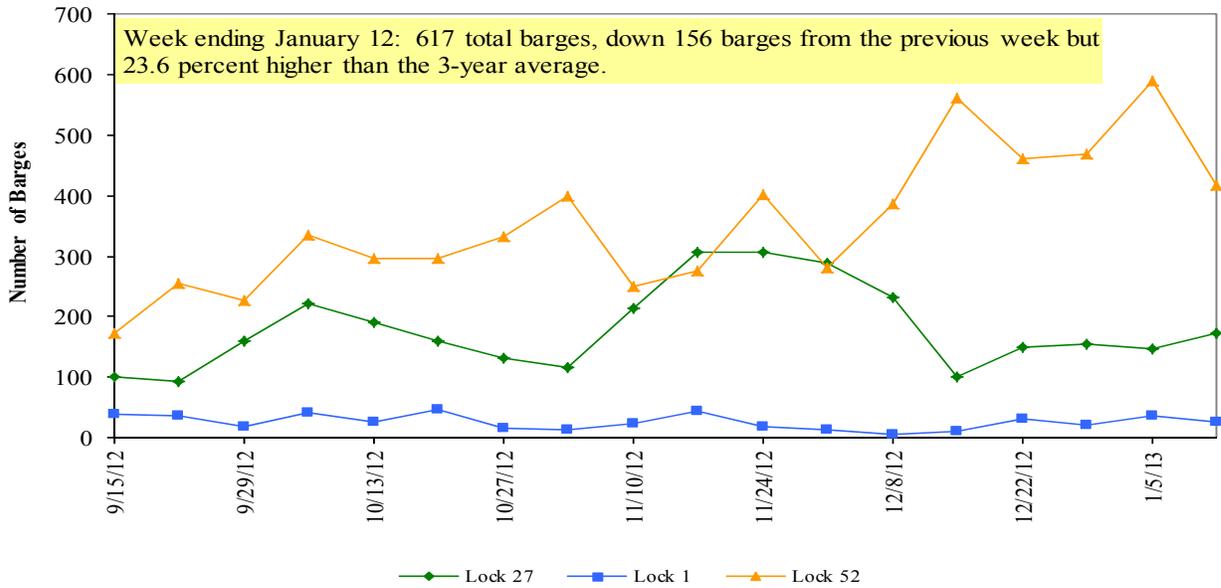
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

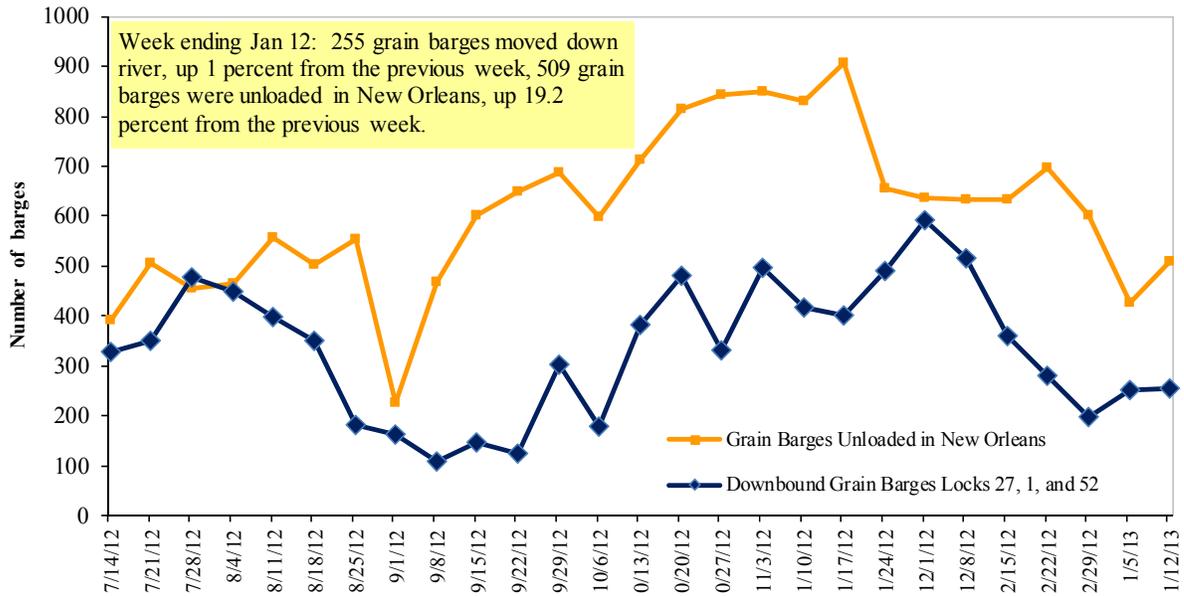
Source: U.S. Army Corps of Engineers

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 1/14/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.002	-0.004	0.059
	New England	4.168	0.015	0.092
	Central Atlantic	4.094	-0.013	0.063
	Lower Atlantic	3.901	-0.001	0.048
II	Midwest ²	3.834	-0.036	0.088
III	Gulf Coast ³	3.824	-0.013	0.047
IV	Rocky Mountain	3.661	-0.027	-0.162
V	West Coast	3.988	0.000	-0.049
	West Coast less California	3.900	-0.018	-0.045
	California	4.063	0.015	-0.053
Total	U.S.	3.894	-0.017	0.040

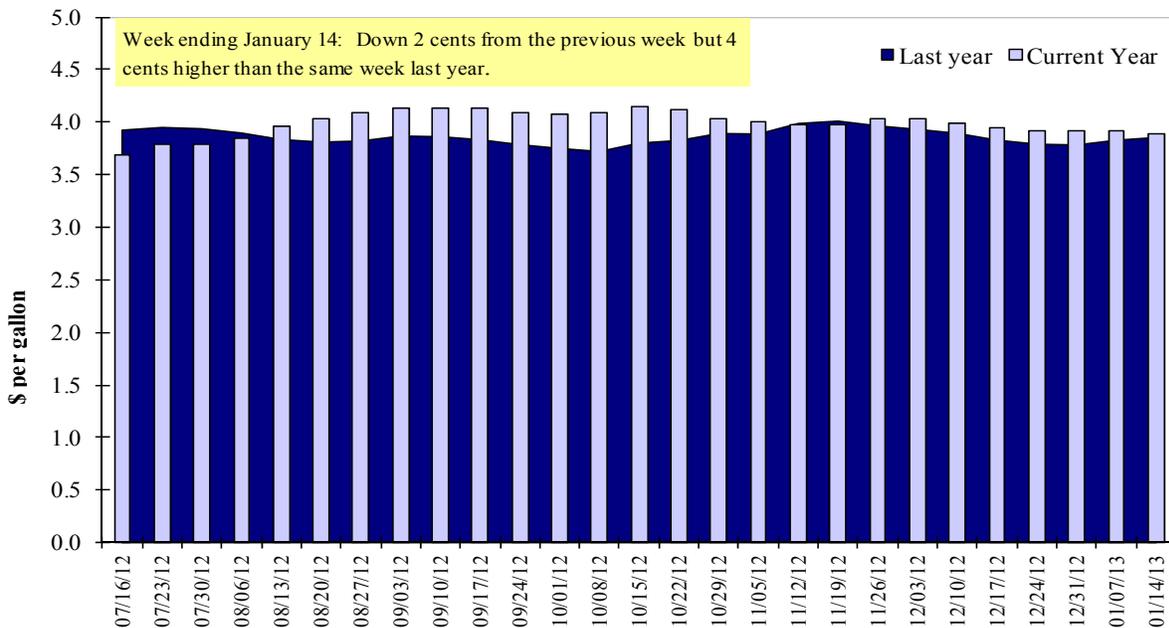
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
1/3/2013	1,843	1,330	1,200	1,220	107	5,701	6,079	8,912	20,692
This week year ago	1,300	583	1,187	1,132	55	4,257	10,474	8,679	23,410
Cumulative exports-marketing year²									
2012/13 YTD	5,436	1,806	3,463	2,587	318	13,610	6,690	22,179	42,479
2011/12 YTD	6,274	2,059	4,042	2,965	358	15,698	14,519	15,874	46,091
YTD 2012/13 as % of 2011/12	87	88	86	87	89	87	46	140	92
Last 4 wks as % of same period 2011/12	131	194	105	110	189	128	60	117	93
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year begins for com and soybeans

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

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

Table 13

Top 5 Importers¹ of U.S. Corn

Week ending 01/03/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	4,185	6,331	(34)	12,367
Mexico	2,916	5,868	(50)	9,617
China	1,359	3,329	(59)	5,414
Korea	422	2,403	(82)	3,639
Venezuela	283	264	7	1,332
Top 5 Importers	9,165	18,195	(50)	32,369
Total US corn export sales	12,769	24,993	(49)	39,180
% of Projected	53%	64%		
Change from prior week	13	322		
Top 5 importers' share of U.S. corn export sales	72%	73%		83%
USDA forecast, January 2013	24,130	39,180	(38)	
Corn Use for Ethanol USDA forecast, Ethanol January 2013	114,300	127,000	(10)	

(n) indicates negative number.

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

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

³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm (Carry-over plus Accumulated Exports)

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 01/03/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	18,812	17,201	9	24,602
Mexico	1,371	1,590	(14)	3,180
Japan	1,091	1,128	(3)	1,891
Indonesia	734	697	5	1,741
Egypt	414	390	6	1,292
Top 5 importers	22,421	21,005	7	32,706
Total US soybean export sales	31,091	24,554	27	37,060
% of Projected	85%	66%		
Change from prior week	322	434		
Top 5 importers' share of U.S. soybean export sales	72%	86%		
USDA forecast, January 2013	36,610	37,060	(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/>³ FAS 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

Week Ending 01/03/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,645	2,700	(2)	3,512
Mexico	2,318	2,706	(14)	3,496
Nigeria	2,197	2,370	(7)	3,248
Philippines	1,613	1,764	(9)	2,039
Korea	1,286	1,089	18	1,983
Egypt	857	247	248	950
Taiwan	806	704	14	888
Indonesia	368	524	(30)	830
Venezuela	533	481	11	594
Iraq	209	572	(63)	572
Top 10 importers	12,831	13,157	(2)	18,111
Total US wheat export sales	19,310	19,955	(3)	28,560
% of Projected	68%	70%		
Change from prior week	234	365		
Top 10 importers' share of U.S. wheat export sales	66%	66%		63%
USDA forecast, January 2012	28,580	28,560	0.1	

(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/>³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

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

Port regions	Week ending 01/10/13	Previous Week ¹	Current Week as % of Previous	2013 YTD ¹	2012 YTD ¹	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total ¹ 2012
							2012	3-yr. avg.	
Pacific Northwest									
Wheat	135	165	82	301	249	121	77	71	12,558
Corn	63	86	73	149	70	213	50	47	5,512
Soybeans	203	196	104	399	526	76	93	110	10,347
Total	401	447	90	848	845	100	76	78	28,417
Mississippi Gulf									
Wheat	58	49	118	107	134	80	105	119	5,457
Corn	140	58	244	198	848	23	32	32	18,068
Soybeans	757	569	133	1,326	1,083	122	114	98	24,616
Total	955	675	141	1,631	2,066	79	82	75	48,142
Texas Gulf									
Wheat	79	23	346	102	175	58	71	56	5,912
Corn	0	0	n/a	0	1	0	0	0	336
Soybeans	0	0	n/a	0	0	n/a	n/a	23	626
Total	79	23	346	102	176	58	83	42	6,874
Interior									
Wheat	17	0	n/a	17	18	90	101	84	1,190
Corn	32	18	181	49	231	21	84	27	6,078
Soybeans	71	26	271	97	181	54	34	82	4,200
Total	120	44	273	163	430	38	104	51	11,468
Great Lakes									
Wheat	0	0	n/a	0	0	n/a	n/a	430	481
Corn	0	0	n/a	0	0	n/a	n/a	0	56
Soybeans	1	0	n/a	1	0	n/a	213	639	708
Total	1	0	n/a	1	0	n/a	294	445	1,245
Atlantic									
Wheat	0	0	n/a	0	1	0	0	0	341
Corn	0	0	n/a	0	16	0	0	0	143
Soybeans	34	64	53	98	32	309	119	100	1,461
Total	34	64	53	98	49	201	101	77	1,944
U.S. total from ports²									
Wheat	289	237	122	526	578	91	84	74	25,939
Corn	235	161	146	396	1,166	34	34	34	30,193
Soybeans	1,066	854	125	1,921	1,822	105	108	97	41,958
Total	1,590	1,253	127	2,843	3,566	80	78	72	98,090

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

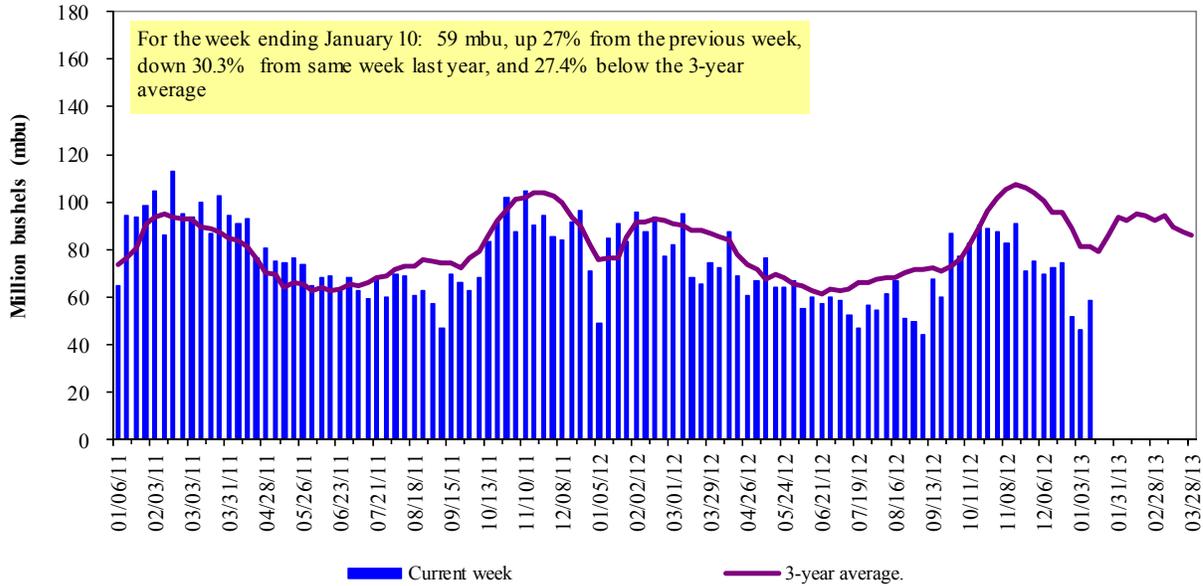
² Total includes only port regions shown above; Interior land-based shipments now included.

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 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

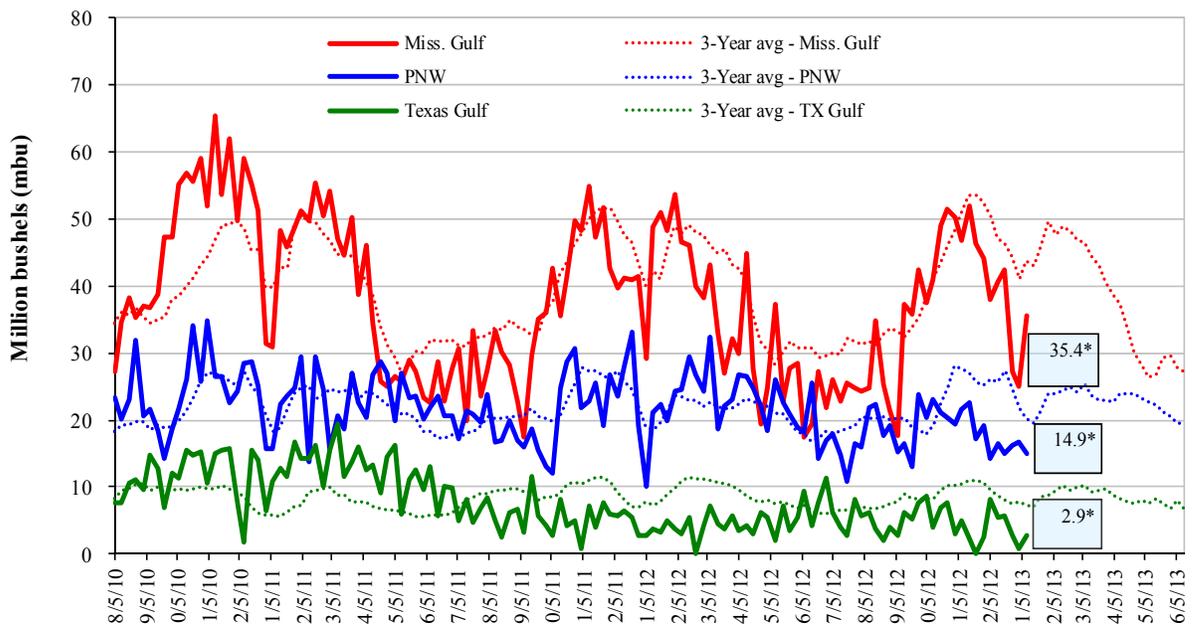


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)



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

<u>January 10 % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	up 42	up 246	up 49	down 10
Last year (same week)	down 27	down 22	down 27	down 29
3-yr avg (4-wk mov. avg)	down 19	down 60	down 25	down 24

Ocean Transportation

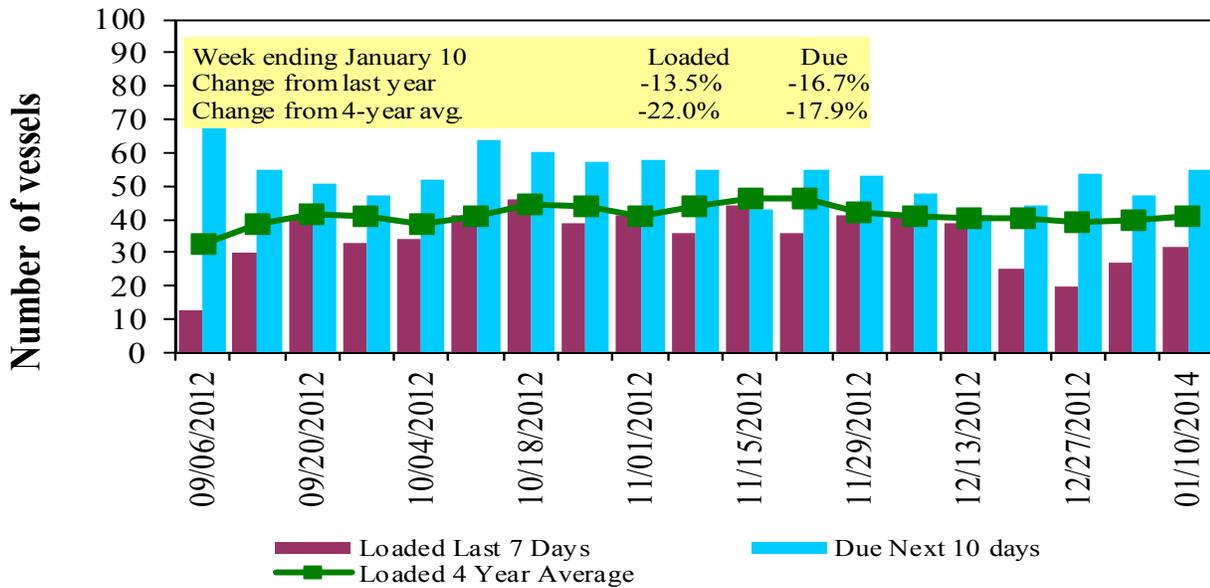
Table 17

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
1/10/2013	20	32	55	16	n/a
1/3/2013	26	27	47	11	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

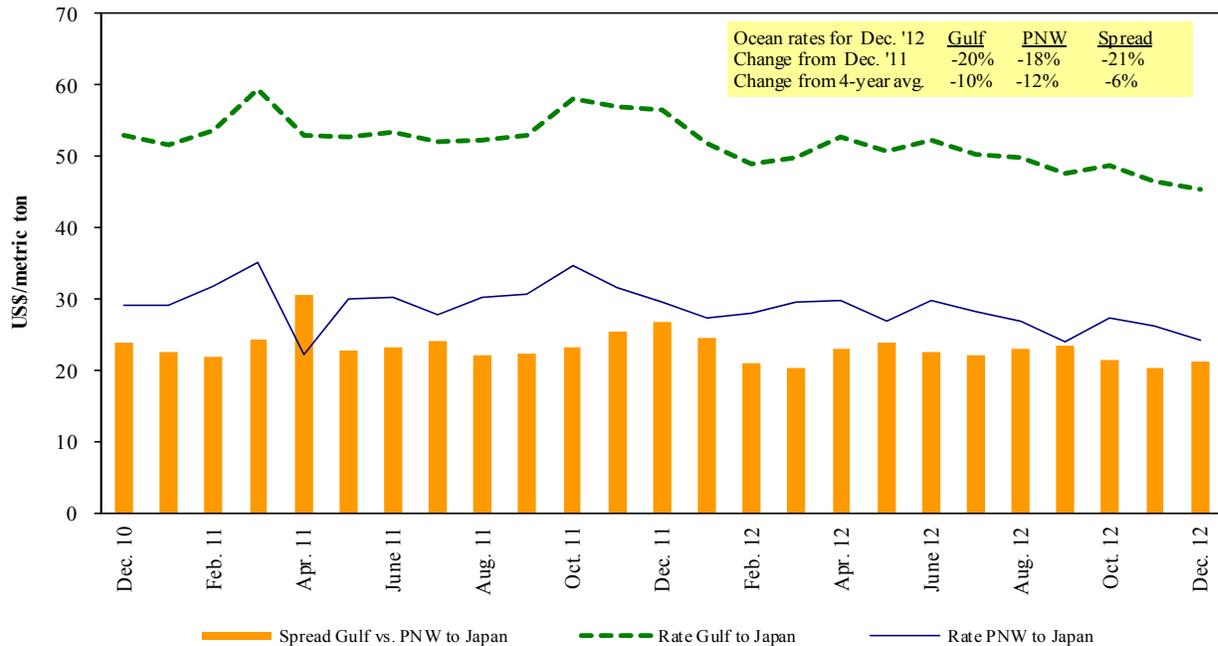
Figure 16
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 01/12/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 15/25	55,000	42.75
U.S. Gulf	China	Heavy Grain	Jan 10/18	55,000	43.00
U.S. Gulf	China	Heavy Grain	Jan 10/15	65,000	43.00
U.S. Gulf	China	Heavy Grain	Dec 5/10	55,000	42.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	55,000	43.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	49.00
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	46.00
U.S. Gulf	China	Heavy Grain	Nov 9/19	55,000	48.00
U.S. Gulf	China	Heavy Grain	Nov 5/10	55,000	46.00
U.S. Gulf	Jordan ¹	Wheat	Jan 7/10	45,000	85.85
Black Sea	Spain Mediterranean	Heavy Grain	Nov 30/Dec 3	50,000	11.00
Brazil	Portugal	Heavy Grain	Dec 10/20	60,000	19.50
Brazil	Portugal	Heavy Grain	Nov 10/20	60,000	15.50
France	Algeria	Wheat	Nov 2/7	25,000	22.00
River Plate	Algeria	Wheat	Nov 7/9	40,000	25.00
Ukraine	Egypt	Heavy Grain	Jan 15/20	60,000	9.50
Ukraine	Rotterdam	Rapeseed	Dec 8/17	60,000	14.80

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

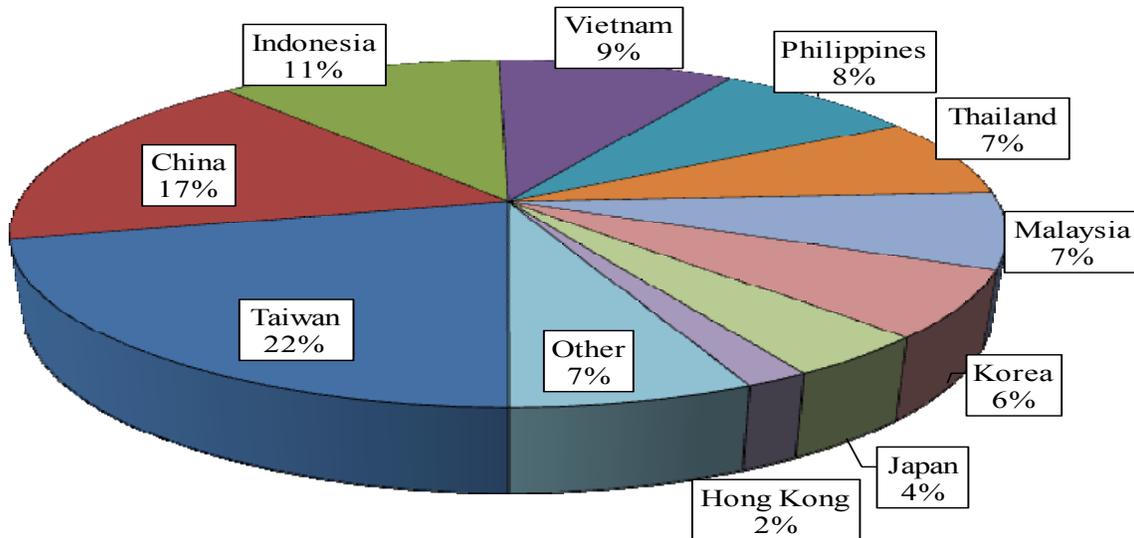
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2011, containers were used to transport 7 percent of total U.S. waterborne grain exports, up 2 percentage points from 2010. Approximately 11 percent of U.S. waterborne grain exports in 2011 went to Asia in containers, up 4 percentage points from 2010. Asia is the top destination for U.S. containerized grain exports—96 percent in 2011.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, October 2012

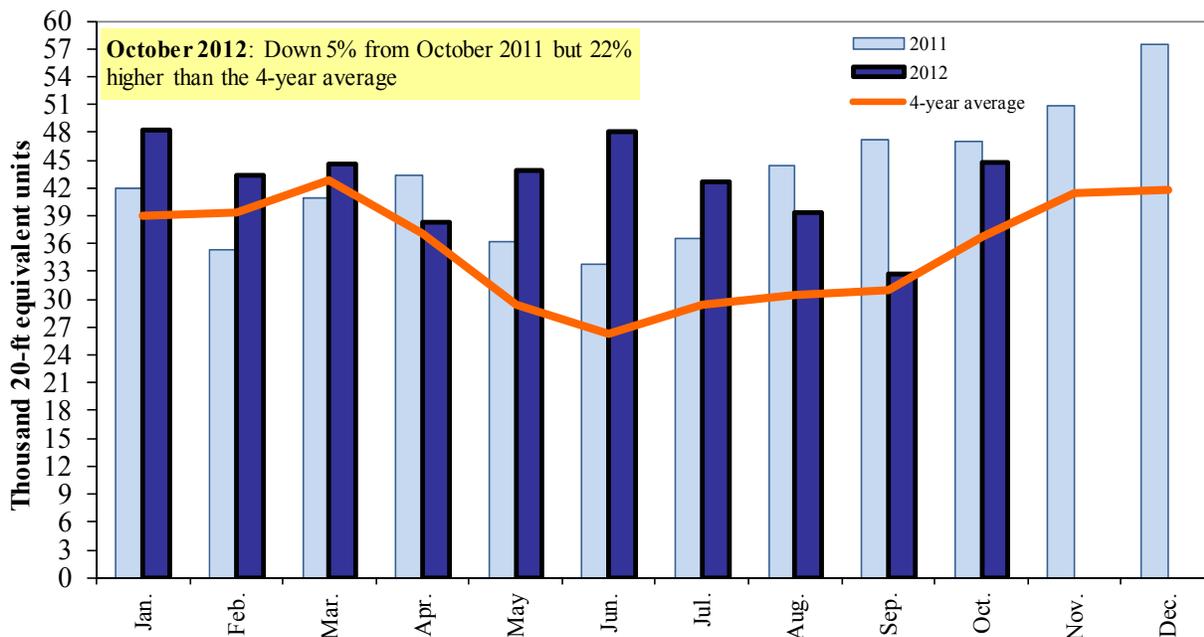


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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