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March 21, 2013



Grain Transportation Report

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WEEKLY HIGHLIGHTS

South America's Grain Harvest Edges Up Ocean Freight Rates

Ocean freight rates for shipping bulk grains have inched up slightly over the past month due to bulk shipments from South America's grain and soybean harvest and increased global demand for iron ore and coal. The reported wait for vessels at the port of Santos, Brazil is as long as 54 days to load grains, soybeans, and sugar, soaking up much of the Panamax vessel supply. Ongoing logistical delays in South America could give the United States a temporary competitive advantage, boosting U.S. grain shipments. As of March 8, the ocean freight rate for shipping bulk grain through the Gulf to Japan was \$48 per metric ton (mt) and \$25 per mt through the Pacific Northwest to Japan—both were 4 percent higher than last month.

USDA Lowers Projected Wheat and Corn 2012/13 Exports; Corn Feed Use Higher

In its March World Agricultural Supply and Demand Estimates, USDA projected wheat exports to reach 1,025 million bushels (mbu)—25 mbu or 2 percent lower than last month's estimate. USDA lowered the corn export projection to 825 mbu—75 mbu or 8 percent lower than last month, 46.5 percent lower than last year, and 57 percent lower than the 5-year average. Lower trade estimates mainly reflect the slow pace of sales and shipments. Corn feed use was raised 100 mbu due to the expansion of the poultry sector. Higher domestic use could imply stronger short-term demand for trucking services. According to [USDA modal share](#) analysis, between 2006 and 2010, trucks moved, on average, 76 percent of domestically-used corn; rail moved an average of 23 percent, and barge share was only about 1 percent. In contrast, during the same period, barges moved an average of 53 percent of export-bound corn, rail moved 38 percent, and trucks accounted for only 9 percent

One-Year Update on the Implementation of the National Strategy for Global Supply Chain Security

The [National Strategy for Global Supply Chain Security](#), released in January 2012, established the U.S. Government's policy to strengthen the global supply chain to protect the interests of the American people and enhance our Nation's economic prosperity. The Administration, in coordination with private sector stakeholders and foreign government partners, made significant progress in implementing the Strategy throughout 2012 and in defining our priorities for future work. As required by the Strategy, Federal Departments and Agencies prepared a consolidated report outlining these efforts and defining 2013 implementation goals. The public version of this report is available [HERE](#).

Snapshots by Sector

Rail

U.S. railroads originated 17,289 **carloads of grain** during the week ending March 2, up 2 percent from last week, down 22 percent from last year, and 24 percent lower than the 3-year average.

During the week ending March 7, average March non-shuttle **secondary railcar bids/offers per car** were \$6.50 below tariff, up \$8.50 from last week, and \$2.50 lower than last year. Average shuttle bids/offers were \$31.50 below tariff, up \$24 from last week, and \$84.50 higher than last year.

Barge

During the week ending March 9, **barge grain movements** totaled 560,315 tons, 66 percent higher than the previous week but 5.6 percent lower than the same period last year.

During the week ending March 9, 376 grain barges **moved down river**, up 72.5 percent from last week; 380 grain barges were **unloaded in New Orleans**, down 24.5 percent from the previous week.

Ocean

During the week ending March 7, 34 **ocean-going grain vessels** were loaded in the Gulf, 3 percent more than the same period last year. Forty vessels are expected to be loaded within the next 10 days, 5 percent more than the same period last year.

During the week ending March 8, the **ocean freight rate** for shipping bulk grain from the Gulf to Japan was \$48 per mt, up 2 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$25 per mt, unchanged from the previous week.

Fuel

During the week ending March 11, U.S. average **diesel fuel prices** were down 4 cents from the previous week at \$4.09 per gallon—4 cents lower than the same week last year.

Containerized Grain Exports

Containerized grain exports to Asia in December totaled more than 40,000 20-foot equivalent units—30 percent lower than the previous year, 4 percent lower than the 4-year average, but 2 percent higher than November movements.

Feature Article/Calendar

Fourth Quarter Corn and Soybean Transportation Costs Mixed; Landed Costs Down

Fourth quarter 2012 transportation costs for shipping corn and soybeans from Minneapolis, MN, through the Gulf and Pacific Northwest (PNW) to Japan were mixed. Quarter-to-quarter transportation costs for shipping grain through the Gulf to Japan increased, primarily because of higher barge rates. Transportation costs for shipping through the PNW to Japan increased slightly for soybeans from quarter to quarter, but costs for shipping corn through the PNW decreased because of lower trucking rates. Total landed costs for shipping through each region were also down from the third quarter because of decreased farm values of the crops, lower trucking rates, and lower ocean freight rates (see tables 1, 2).

U.S. Gulf Costs: Total fourth quarter transportation costs for shipping corn and soybeans from Minneapolis, MN, through the U.S. Gulf to Japan were up 6 percent from the third quarter (table 1). Barge rates increased 27 percent from quarter to quarter as the drought caused navigation restrictions on the Mississippi River. Fourth quarter barge rates accounted for 42 percent of the total transportation cost for shipping corn and soybeans from Minnesota through the Gulf, compared with 34 percent the previous quarter. Trucking rates decreased 20 percent from the previous quarter as trucking activity decreased and U.S. corn exports reached one of the lowest levels on record. Year-to-year trucking rates, however, increased 6 percent, pushed up by rising diesel fuel prices (see table 1). Transportation costs for shipping grain from the Gulf decreased 4 percent from year to year because of the 18 percent drop in ocean freight rates.

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

	Corn					Soybeans				
	\$/metric ton		Percent change			\$/metric ton		Percent Change		
	4thQtr 11	3rdQtr 12	4thQtr 12	Yr. to Yr.	Qtr to Qtr	4thQtr 11	3rdQtr 12	4thQtr 12	Yr. to Yr.	Qtr to Qtr
Truck	10.22	13.51	10.86	6.26	-19.62	10.22	13.51	10.86	6.26	-19.62
Barge	35.25	32.34	41.08	16.54	27.03	35.25	32.34	41.08	16.54	27.03
Ocean	57.13	49.18	46.80	-18.08	-4.84	57.13	49.18	46.80	-18.08	-4.84
Total Transportation Cost	102.60	95.03	98.74	-3.76	3.90	102.60	95.03	98.74	-3.76	3.90
Farm Value ¹	215.74	273.87	263.63	22.20	-3.74	418.88	562.18	518.09	23.68	-7.84
Total Landed Cost	318.34	368.90	362.37	13.83	-1.77	521.48	657.21	616.83	18.28	-6.14
Transportation % Landed Cost	32.23	25.76	27.25			19.67	14.46	16.01		

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

	Corn					Soybeans				
	\$/metric ton		Percent change			\$/metric ton		Percent Change		
	4thQtr 11	3rdQtr 12	4thQtr 12	Yr. to Yr.	Qtr to Qtr	4thQtr 11	3rdQtr 12	4thQtr 12	Yr. to Yr.	Qtr to Qtr
Truck	10.22	13.51	10.86	6.26	-19.62	10.22	13.51	10.86	6.26	-19.62
Rail ²	53.93	53.80	54.96	1.91	2.16	56.20	56.08	60.22	7.15	7.38
Ocean	31.96	26.31	25.90	-18.96	-1.56	31.96	26.31	25.90	-18.96	-1.56
Total Transportation Cost	96.11	93.62	91.72	-4.57	-2.03	98.38	95.90	96.98	-1.42	1.13
Farm Value ¹	215.74	273.87	263.63	22.20	-3.74	418.88	562.18	518.09	23.68	-7.84
Total Landed Cost	311.85	367.49	355.35	13.95	-3.30	517.26	658.08	615.07	18.91	-6.54
Transportation % Landed Cost	30.82	25.48	25.81			19.02	14.57	15.77		

Source: USDA/AMS/TMP
n/a = not available

¹ Source: USDA/NASS, Agricultural Prices

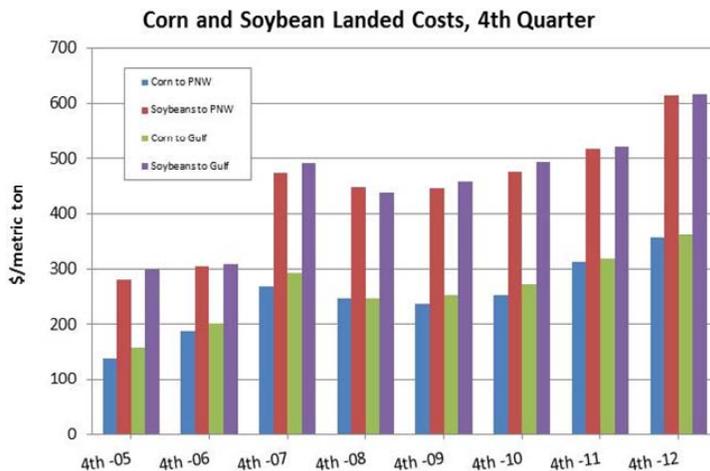
² Rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains

The total landed cost for shipping corn and soybeans through the Gulf reached \$362/metric ton (mt) and \$617 (mt) respectively. Compared to the third quarter, total landed costs decreased 2 percent for corn and 6 percent for soybeans, primarily because of decreased farm value of the crops, lower trucking rates, and lower barge rates (table 1). Although down from the third quarter 2012, farm values reached a fourth quarter record high, pushing up the landed cost for shipping corn and soybeans from Minnesota via the Gulf to Japan to a fourth quarter record (see figure).

Year-to-year landed costs for shipping from the Gulf increased 14 percent for corn and 18 percent for soybeans as trucking rates and barge rates increased (see table 1). Fourth quarter landed costs for shipping

corn to Japan was 16 percent above the previous peak (\$318/mt) during the fourth quarter 2011. Fourth quarter total landed cost for shipping soybeans to Japan also surpassed last year's record by 18 percent (see figure). Transportation costs for shipping corn from the Gulf to Japan accounted for over 27 percent of the total landed cost during the fourth quarter. This is above the previous quarter but below last year. The soybean transportation costs' share of the landed cost accounted for 16 percent of the landed cost, which is also above the previous quarter but below the same quarter last year (see table 1).

Pacific Northwest Costs: Compared to the third quarter 2012, fourth quarter total transportation costs from Minneapolis, MN, via the (PNW) to Japan decreased 2 percent for corn but increased 1 percent for soybeans (see table 2). The lower shipping cost for corn was caused mainly the drop in quarter-to-quarter trucking rates. Higher quarter-to-quarter rail rates contributed to the increase in soybean transportation costs (table 2). Compared to the third quarter, rail rates for shipping grain to the PNW increased 2 percent for corn and 7 percent for soybeans as railroads increased tariff rates and fuel surcharges continued to increase. Year-to-year transportation costs for shipping grain from Minnesota through the PNW to Japan decreased 5 percent for corn and 1 percent for soybeans primarily because of lower ocean freight rates that offset increases in truck and rail rates.



The quarter-to-quarter total landed costs for shipping corn and soybeans from the PNW to Japan decreased to \$355/mt and \$615/mt, down 3 and 7 percent because of decreased farm values of the crops, lower truck rates, and lower ocean freight rates (see table 2). Similar to the landed costs for shipping grain from the Gulf, landed costs for shipping corn and soybeans to Japan from the PNW reached a fourth quarter record.

The total landed cost increased 14 percent for corn from year to year and over 19 percent for soybeans, mainly because of higher year-to-year farm values (see table 2). The fourth quarter total landed cost for shipping corn from Minnesota via the PNW to Japan was 14 percent above the previous high set in 2011 (see figure). The total landed cost for shipping soybeans through the PNW was 19 percent above the peak set in 2011 (see figure). Transportation costs for corn shipped through the PNW accounted for about 26 percent of the total landed cost during the fourth quarter, higher than the third quarter but lower than the same time the previous year (see table 2). Fourth quarter transportation costs for soybeans shipped through the PNW were 16 percent of the landed cost, also higher than the past quarter but lower than last year.

According to USDA, fourth quarter inspections of corn for export reached the lowest level on record, down 62 percent from the previous year due to the 2012 drought (see *GTR* dated 01/10/13). Fourth quarter inspections of corn shipped to Japan were down 47 percent from the past year. Soybean inspections, however, increased 35 percent from the previous year as demand from Asia increased substantially. According to the March World Agricultural Supply and Demand Estimates report, the forecast for 2012/13 corn is down 8 percent from the February estimate, 47 percent lower than last year and 57 percent lower than the 5-year average due to lower U.S. corn availability, increased competition from South America and competitive advantage of feed quality wheat. The forecast for soybean exports remained unchanged but seasonal shipping patterns indicate that as the South American harvest intensifies, U.S. soybean shipments normally decrease. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
03/13/13	274	232	207	181	215	177
03/06/13	277	231	206	181	210	177

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)

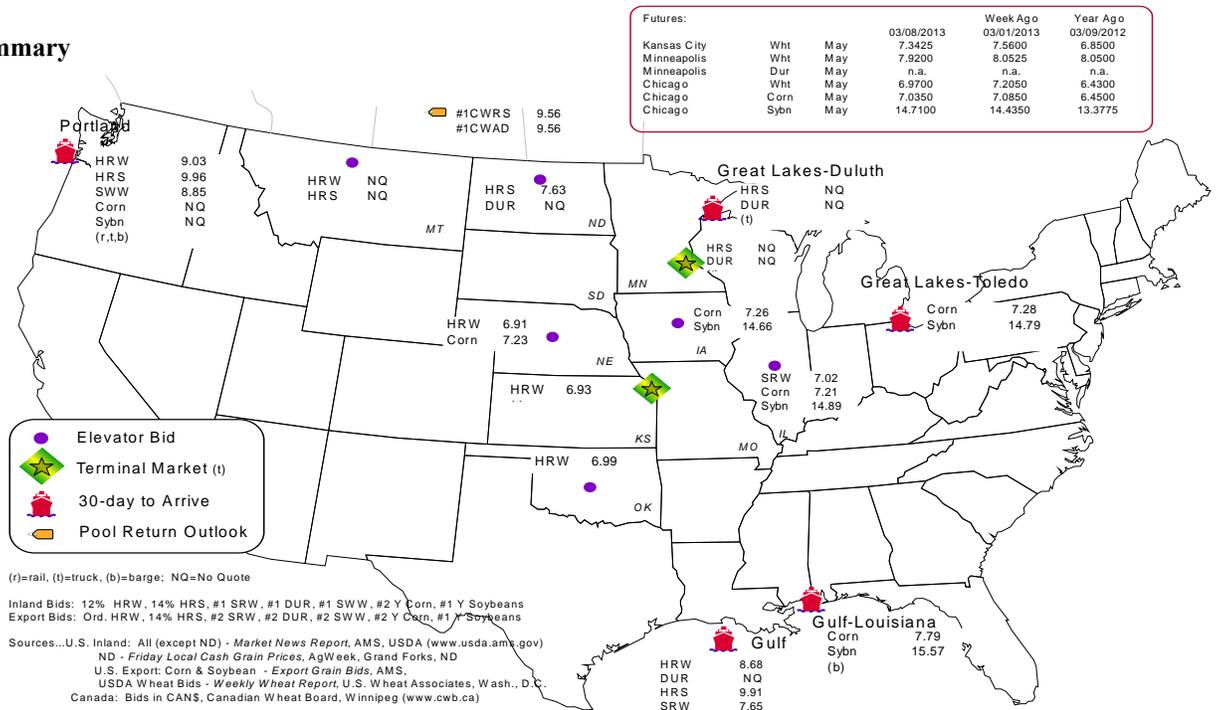
Commodity	Origin--Destination	3/8/2013	3/1/2013
Corn	IL--Gulf	-0.58	-0.57
Corn	NE--Gulf	-0.56	-0.65
Soybean	IA--Gulf	-0.91	-0.97
HRW	KS--Gulf	-1.75	-1.62
HRS	ND--Portland	-2.33	-2.07

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				
03/06/2013 ^p	47	932	4,193	465	5,637	03/02/13	839	
02/27/2013 ^r	168	872	3,705	502	5,247	02/23/13	1,195	
2013 YTD ^r	7,433	7,862	42,811	7,195	65,301	2013 YTD	10,569	
2012 YTD ^r	2,780	6,905	45,931	5,055	60,671	2012 YTD	19,723	
2013 YTD as % of 2012 YTD	267	114	93	142	108	% change YTD	54	
Last 4 weeks as % of 2012 ²	59	166	89	111	95	Last 4wks % 2012	49	
Last 4 weeks as % of 4-year avg. ²	36	68	108	86	89	Last 4wks % 4 yr	63	
Total 2012	22,604	40,780	199,419	31,854	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.

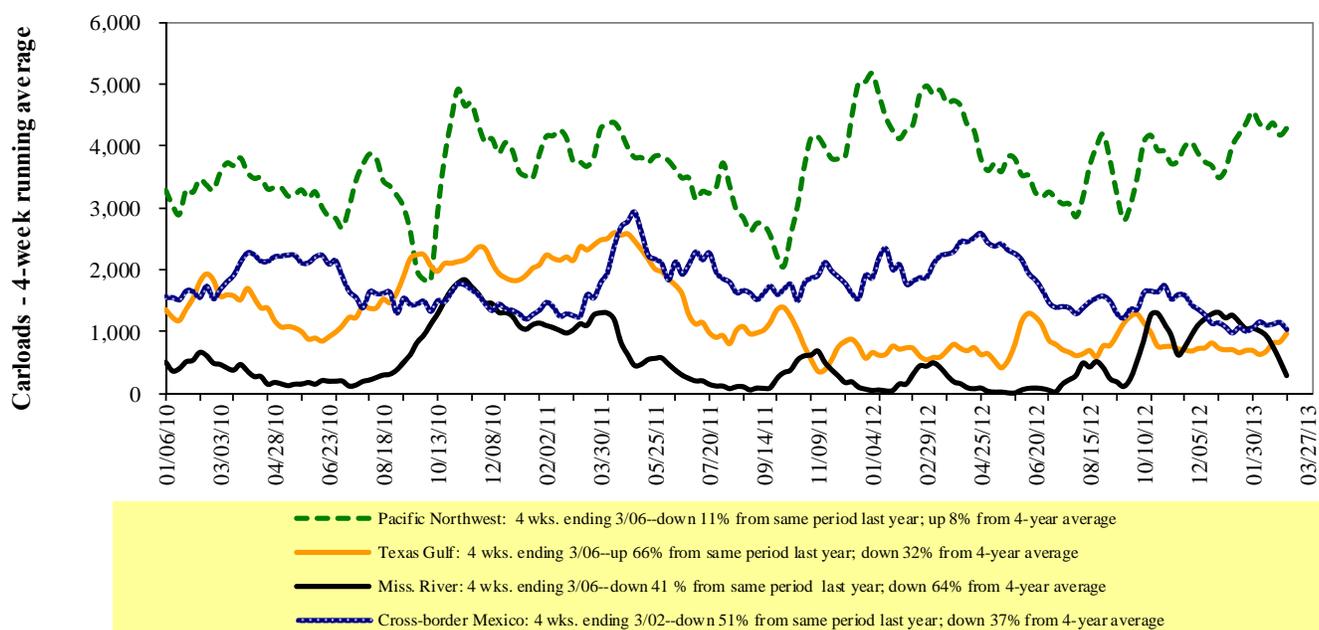
³ Cross-border weekly data is approximately 15 percent below weekly AAR carloads received by Mexican railroads to reflect within switching between KCSM and FerroMex. YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

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

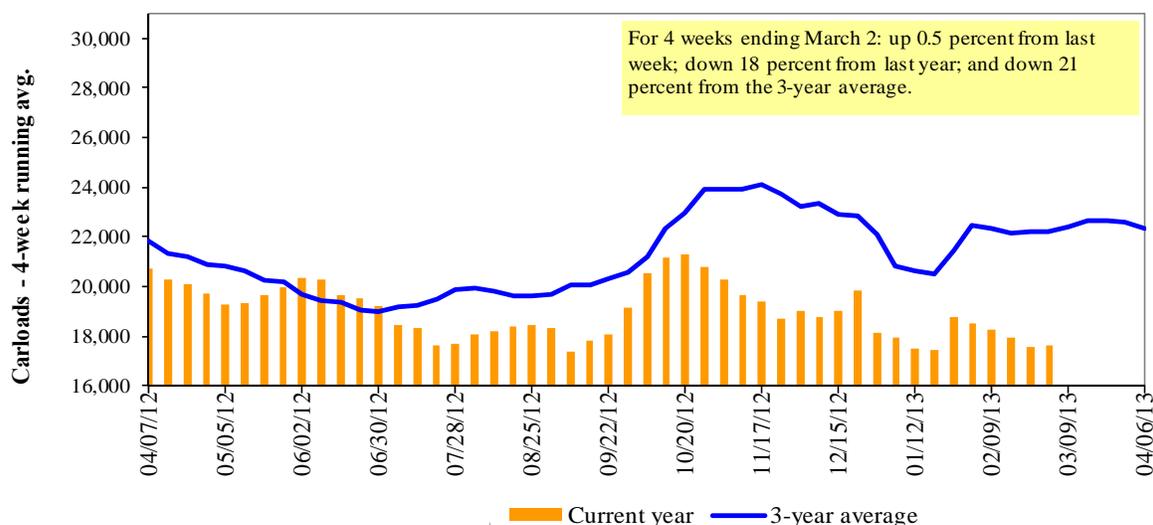
Table 4

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
03/02/13	1,394	2,526	9,493	392	3,484	17,289	3,084	5,371
This week last year	2,004	3,231	11,249	406	5,272	22,162	3,939	5,442
2013 YTD	14,292	24,027	85,871	4,440	33,851	162,481	32,442	47,800
2012 YTD	19,639	27,090	91,558	4,430	46,338	189,055	34,360	46,259
2013 YTD as % of 2012 YTD	73	89	94	100	73	86	94	103
Last 4 weeks as % of 2012	73	83	87	87	75	82	85	95
Last 4 weeks as % of 3-yr avg. ¹	73	84	85	64	67	79	86	100
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								
	3/7/2013	Mar-13	Mar-12	Apr-13	Apr-12	May-13	May-12	Jun-13	Jun-12
BNSF ³									
COT grain units		no bids	1	no bids	0	no bids	0	no bids	no bids
COT grain single-car ⁵		0 . . 10	0 . . 2	3 . . 10	0 . . 5	0	0 . . 10	no bids	0
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.

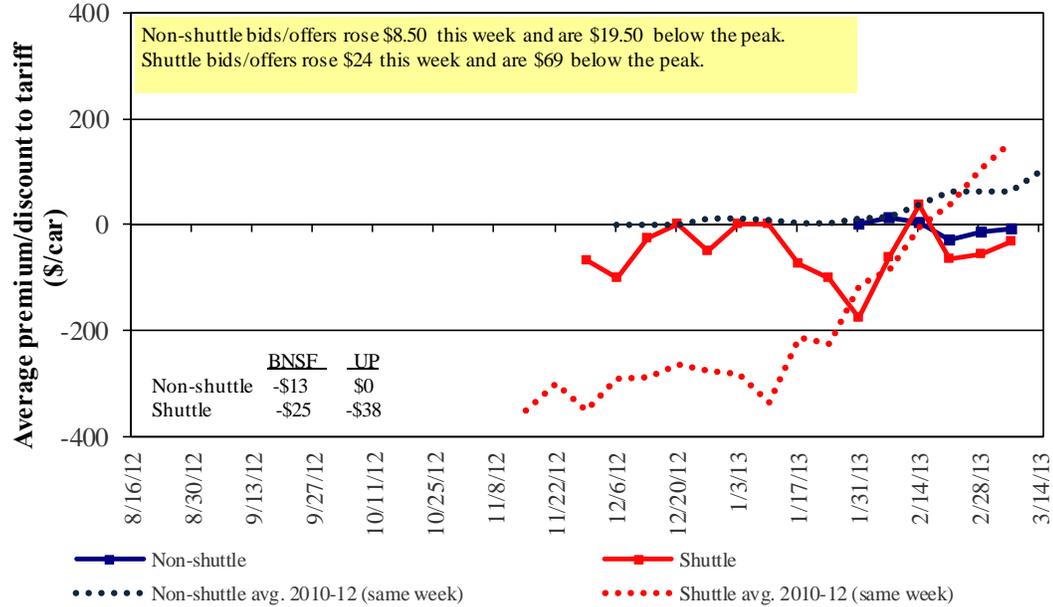
⁵Range is shown because average is not available. Not available = n/a.

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 March 2013, Secondary Market

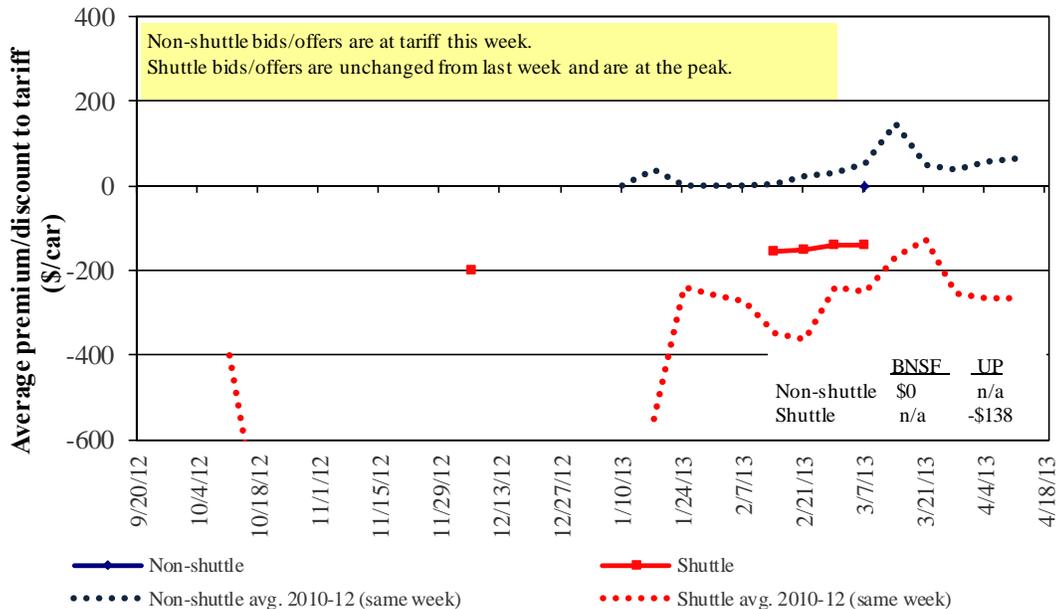


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

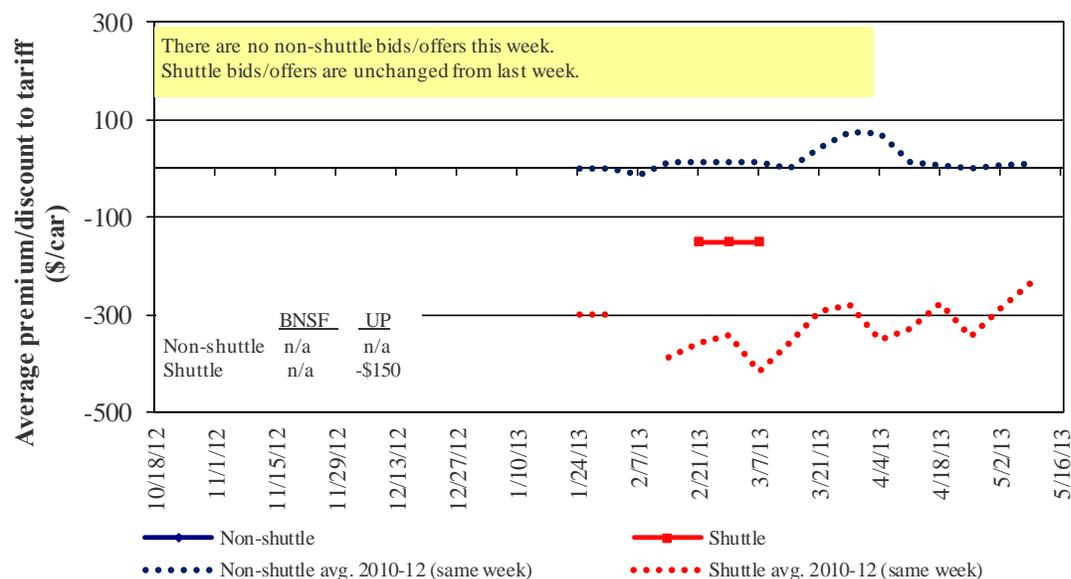


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in May 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					
	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13
Non-shuttle						
BNSF-GF	(13)	-	n/a	n/a	n/a	n/a
Change from last week	12	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	(9)	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	5	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	n/a
Shuttle²						
BNSF-GF	(25)	n/a	n/a	n/a	n/a	n/a
Change from last week	(14)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	169	n/a	n/a	n/a	n/a	n/a
UP-Pool	(38)	(138)	(150)	n/a	n/a	(125)
Change from last week	62	-	-	n/a	n/a	(25)
Change from same week 2011	-	137	225	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
3/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ^l ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$187	\$33.08	\$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$107	\$36.25	\$0.99	9
	Wichita, KS	Los Angeles, CA	\$6,026	\$551	\$65.31	\$1.78	3
	Wichita, KS	New Orleans, LA	\$3,645	\$329	\$39.47	\$1.07	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$452	\$59.83	\$1.63	0
	Northwest KS	Galveston-Houston, TX	\$3,912	\$361	\$42.43	\$1.15	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$502	\$45.82	\$1.25	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$372	\$34.58	\$0.94	3
	Toledo, OH	Raleigh, NC	\$4,508	\$416	\$48.89	\$1.33	3
	Des Moines, IA	Davenport, IA	\$2,006	\$79	\$20.70	\$0.56	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$312	\$42.03	\$1.14	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$200	\$35.29	\$0.96	3
	Des Moines, IA	Little Rock, AR	\$3,154	\$232	\$33.62	\$0.92	3
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$675	\$57.00	\$1.55	2
	Minneapolis, MN	New Orleans, LA	\$3,579	\$402	\$39.53	\$1.08	2
	Toledo, OH	Huntsville, AL	\$3,575	\$295	\$38.43	\$1.05	2
	Indianapolis, IN	Raleigh, NC	\$4,578	\$419	\$49.62	\$1.35	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$200	\$34.43	\$0.94	3
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$372	\$39.44	\$1.07	6	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$317	\$38.70	\$1.05	7
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$247	\$38.54	\$1.05	12
	Chicago, IL	Albany, NY	\$3,771	\$390	\$41.32	\$1.12	4
	Grand Forks, ND	Portland, OR	\$5,061	\$547	\$55.69	\$1.52	5
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$570	\$66.06	\$1.80	4
	Northwest KS	Portland, OR	\$4,880	\$592	\$54.34	\$1.48	3
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$666	\$54.28	\$1.48	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$610	\$53.33	\$1.45	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$372	\$32.78	\$0.89	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$356	\$36.40	\$0.99	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$291	\$37.75	\$1.03	3
	Minneapolis, MN	Tacoma, WA	\$4,800	\$661	\$54.23	\$1.48	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$684	\$48.50	\$1.32	1
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$610	\$58.89	\$1.60	6
	Minneapolis, MN	Portland, OR	\$5,330	\$666	\$59.55	\$1.62	6
	Fargo, ND	Tacoma, WA	\$5,230	\$543	\$57.32	\$1.56	6
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$429	\$43.49	\$1.18	6
	Toledo, OH	Huntsville, AL	\$2,750	\$295	\$30.24	\$0.82	3
Grand Island, NE	Portland, OR	\$5,195	\$606	\$57.60	\$1.57	2	

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	\$6,262	\$579	\$69.90	\$1.90	-17
	OK	Cuautitlan, EM	\$6,552	\$703	\$74.13	\$2.02	-2
	KS	Guadalajara, JA	\$7,444	\$679	\$83.00	\$2.26	-2
	TX	Salinas Victoria, NL	\$3,553	\$265	\$39.01	\$1.06	-3
Corn	IA	Guadalajara, JA	\$7,699	\$799	\$86.82	\$2.20	-1
	SD	Celaya, GJ ⁵	\$8,113	\$757	\$90.63	\$2.30	n/a
	NE	Queretaro, QA	\$7,153	\$710	\$80.34	\$2.04	1
	SD	Salinas Victoria, NL	\$5,700	\$576	\$64.12	\$1.63	1
	MO	Tlalnepantla, EM	\$6,592	\$689	\$74.40	\$1.89	4
	SD	Torreon, CU	\$6,522	\$634	\$73.12	\$1.86	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$674	\$84.34	\$2.29	7
	NE	Guadalajara, JA	\$8,134	\$771	\$90.99	\$2.47	1
	IA	El Castillo, JA	\$8,555	\$753	\$95.10	\$2.59	4
	KS	Torreon, CU	\$6,651	\$478	\$72.84	\$1.98	2
Sorghum	TX	Guadalajara, JA	\$6,464	\$493	\$71.08	\$1.80	-2
	NE	Celaya, GJ ⁵	\$6,997	\$688	\$78.51	\$1.99	n/a
	KS	Queretaro, QA	\$6,815	\$432	\$74.04	\$1.88	6
	NE	Salinas Victoria, NL	\$5,438	\$506	\$60.73	\$1.54	6
	NE	Torreon, CU	\$6,153	\$564	\$68.64	\$1.74	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

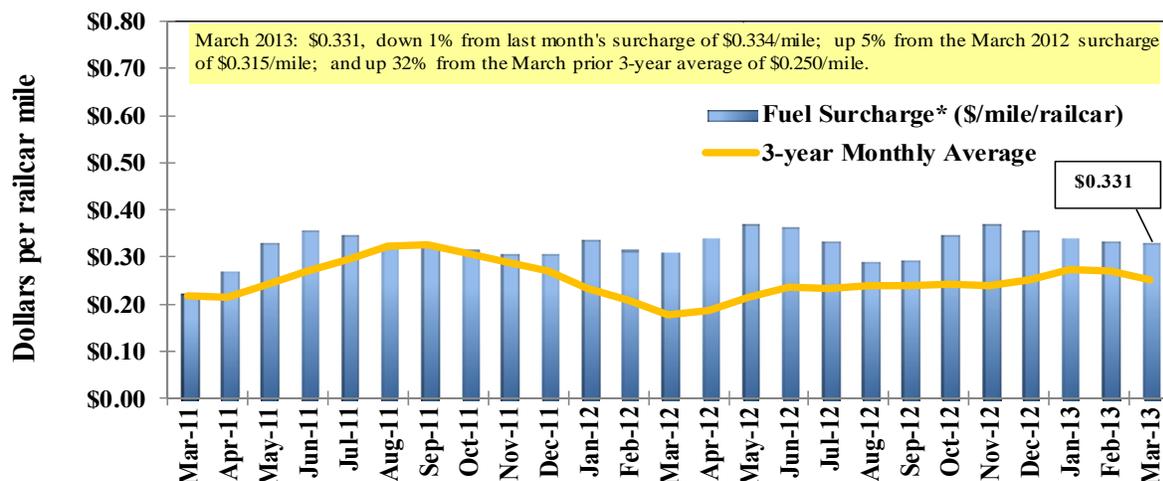
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

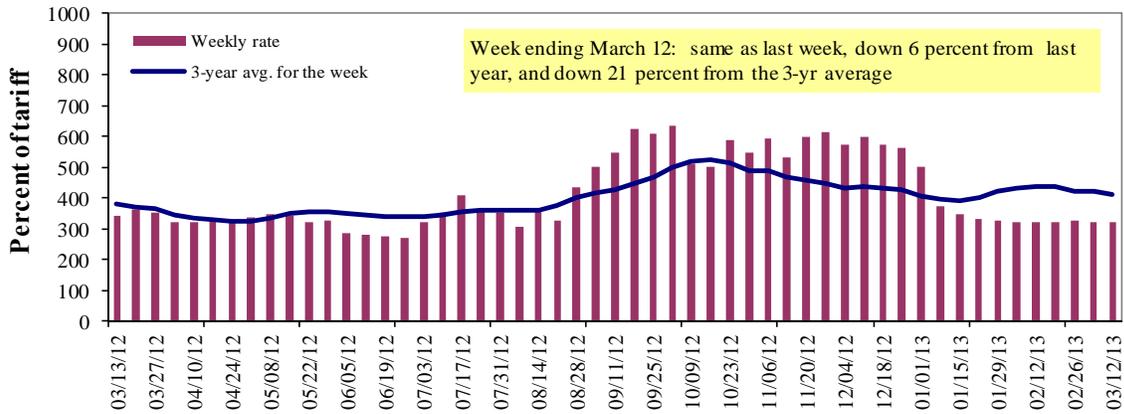
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

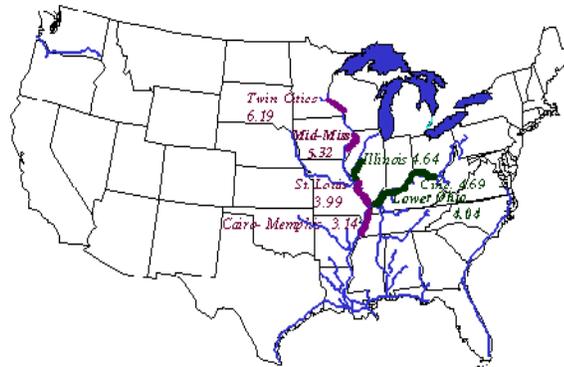
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	3/12/2013	-	340	325	250	223	223	185
	3/5/2013	-	345	325	250	230	230	185
\$/ton	3/12/2013	-	18.09	15.08	9.98	10.46	9.01	5.81
	3/5/2013	-	-	15.08	9.98	10.79	9.29	5.81
Current week % change from the same week:								
	Last year	-	-11	-6	-1	-29	-29	-17
	3-year avg. ²	-	-11	-21	-21	-37	-37	-34
Rate¹	April	357	310	300	250	222	222	185
	June	343	303	303	250	228	228	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



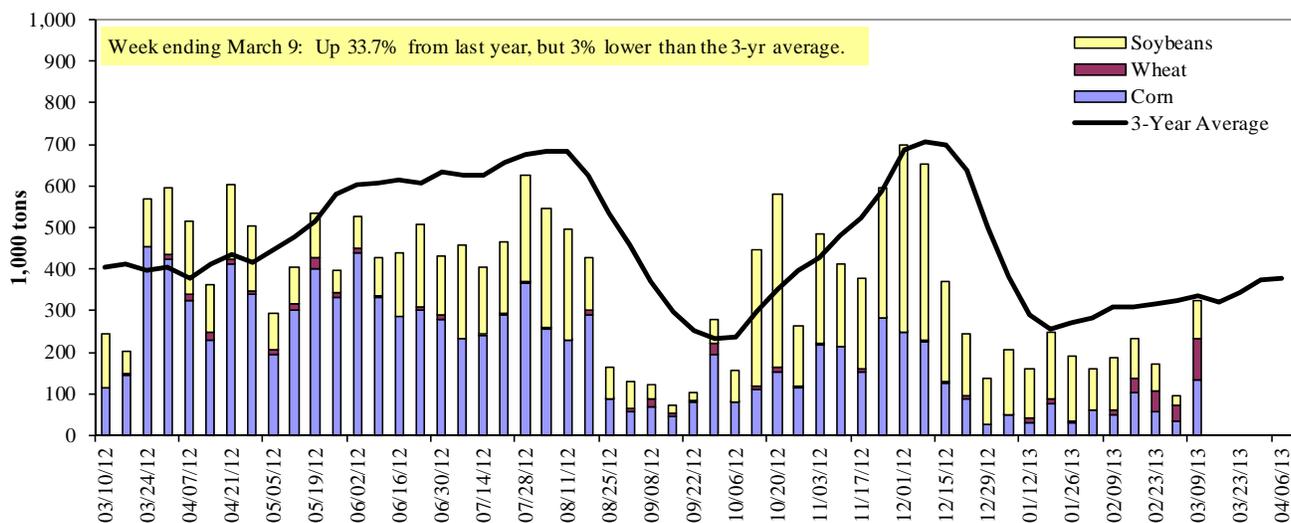
Calculating barge rate per ton:

$(\text{Index} * 1976 \text{ tariff benchmark rate per ton}) / 100$

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 3/9/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	34	3	6	0	43
Alton, IL (L26)	113	87	45	0	246
Granite City, IL (L27)	133	100	92	0	325
Illinois River (L8)					
	64	76	31	0	171
Ohio River (L52)					
	83	34	79	4	199
Arkansas River (L1)					
	1	25	10	0	36
Weekly total - 2013	218	159	180	4	560
Weekly total - 2012	264	39	284	6	593
2013 YTD ¹	1,047	820	2,594	49	4,510
2012 YTD	3,342	295	2,574	52	6,262
2013 as % of 2012 YTD	31	279	101	96	72
Last 4 weeks as % of 2012 ²	48	40	74	48	76
Total 2012	14,837	1,794	12,663	229	29,523

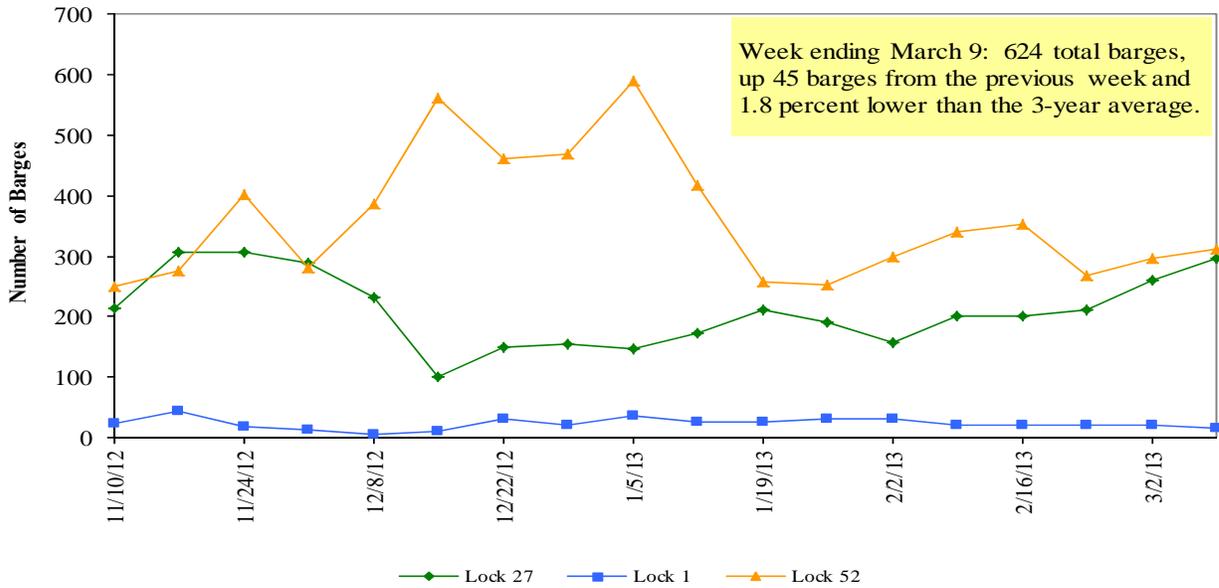
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

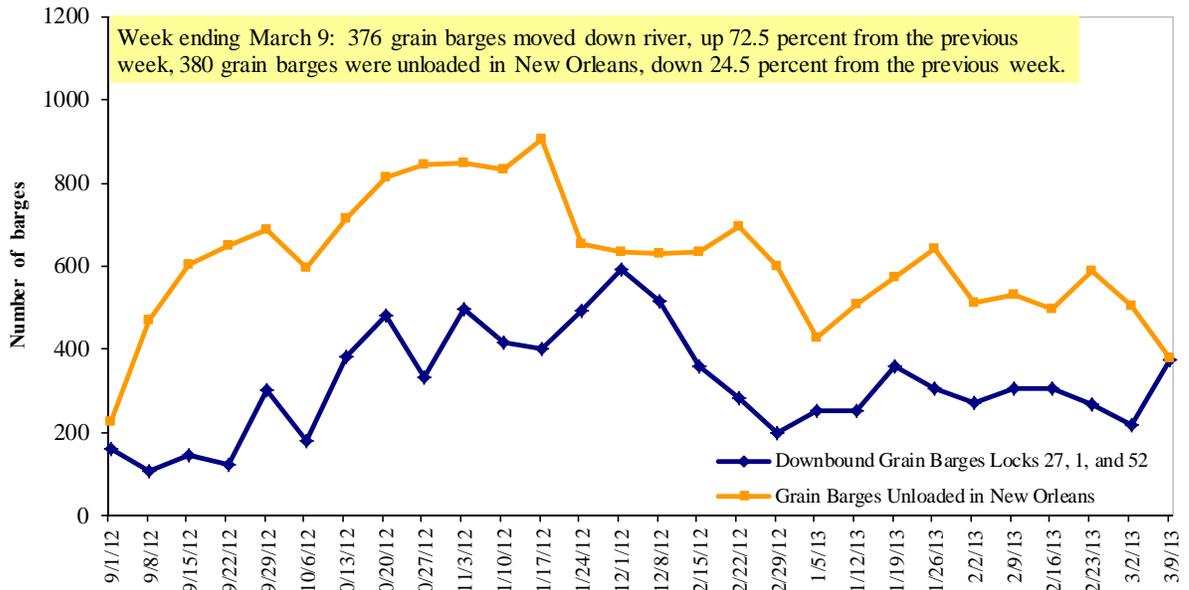
Source: U.S. Army Corps of Engineers

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 3/11/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.120	-0.047	-0.049
	New England	4.243	-0.055	-0.007
	Central Atlantic	4.171	-0.064	-0.076
	Lower Atlantic	4.058	-0.034	-0.038
II	Midwest ²	4.043	-0.042	0.027
III	Gulf Coast ³	4.036	-0.029	0.000
IV	Rocky Mountain	4.010	-0.037	-0.059
V	West Coast	4.227	-0.053	-0.194
	West Coast less California	4.165	-0.042	-0.183
	California	4.280	-0.061	-0.203
Total	U.S.	4.088	-0.042	-0.035

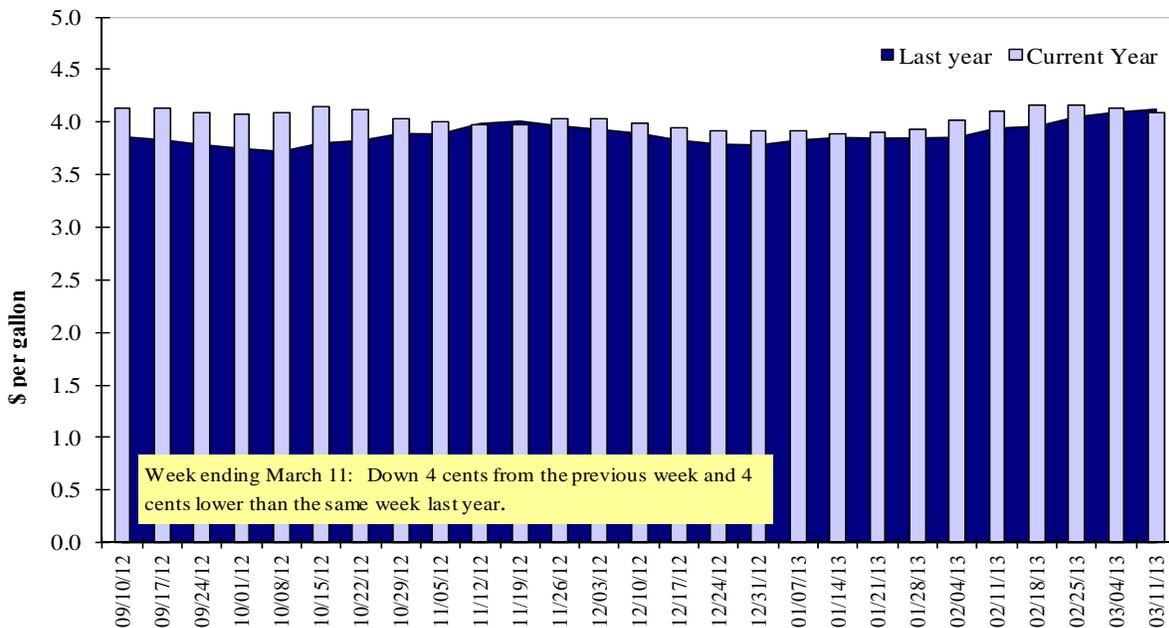
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
2/28/2013	1,685	1,681	1,163	726	111	5,366	5,059	3,933	14,358
This week year ago	1,393	966	1,303	1,621	26	5,309	10,277	5,487	21,073
Cumulative exports-marketing year²									
2012/13 YTD	6,837	2,899	4,297	3,577	363	17,973	9,437	31,059	58,469
2011/12 YTD	7,443	2,480	4,822	3,914	388	19,047	21,022	24,388	64,457
YTD 2012/13 as % of 2011/12	92	117	89	91	94	94	45	127	91
Last 4 wks as % of same period 2011/12	127	169	91	52	340	104	52	87	74
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 corn and soybeans

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

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

Table 13

Top 5 Importers¹ of U.S. Corn

Week ending 02/28/2013	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	4,870	8,308	(41)	12,367
Mexico	3,352	7,963	(58)	9,617
China	2,028	3,781	(46)	5,414
Korea	360	3,250	(89)	3,639
Venezuela	396	608	(35)	1,332
Top 5 Importers	11,006	23,910	(54)	32,369
Total US corn export sales	14,496	31,299	(54)	39,180
% of Projected	69%	80%		
Change from prior week	(50)	446		
Top 5 importers' share of U.S. corn export sales	76%	76%		83%
USDA forecast, March 2013	20,960	39,180	(47)	
Corn Use for Ethanol USDA forecast, Ethanol March 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 02/28/2013	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	21,306	19,980	7	24,602
Mexico	1,858	2,091	(11)	3,180
Japan	1,409	1,338	5	1,891
Indonesia	1,088	1,018	7	1,741
Egypt	632	697	(9)	1,292
Top 5 importers	26,294	25,123	5	32,706
Total US soybean export sales	34,991	29,875	17	37,060
% of Projected	96%	81%		
Change from prior week	392	1,015		
Top 5 importers' share of U.S. soybean export sales	75%	84%		
USDA forecast, March 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 02/28/2013	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	3,151	3,309	(5)	3,512
Mexico	2,576	3,223	(20)	3,496
Nigeria	2,574	2,768	(7)	3,248
Philippines	1,789	1,871	(4)	2,039
Korea	1,374	1,771	(22)	1,983
Egypt	1,246	445	180	950
Taiwan	892	829	8	888
Indonesia	435	695	(37)	830
Venezuela	572	565	1	594
Iraq	209	572	(63)	572
Top 10 importers	14,819	16,048	(8)	18,111
Total US wheat export sales	23,339	24,356	(4)	28,560
% of Projected	84%	85%		
Change from prior week	618	447		
Top 10 importers' share of U.S. wheat export sales	63%	66%		63%
USDA forecast, March 2013	27,900	28,560	(2)	

(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 03/07/13	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	157	243	65	2,381	2,603	92	70	90	12,625
Corn	109	79	138	799	1,194	67	52	46	5,512
Soybeans	178	399	45	2,855	2,585	110	109	119	10,347
Total	444	721	62	6,036	6,382	95	81	90	28,484
Mississippi Gulf									
Wheat	357	211	169	1,648	1,057	156	214	299	5,462
Corn	237	273	87	1,874	4,800	39	44	36	18,068
Soybeans	216	521	41	5,846	5,919	99	83	75	24,684
Total	810	1,004	81	9,368	11,776	80	80	72	48,215
Texas Gulf									
Wheat	155	205	76	1,097	956	115	161	70	5,912
Corn	0	2	0	7	91	8	5	4	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
Total	155	207	75	1,226	1,047	117	131	54	6,874
Interior									
Wheat	6	21	30	181	180	100	354	45	1,218
Corn	47	58	81	441	1,690	26	120	31	6,115
Soybeans	48	102	47	879	889	99	40	98	4,204
Total	101	181	56	1,501	2,759	54	46	54	11,538
Great Lakes									
Wheat	1	0	n/a	3	0	n/a	n/a	24	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	1	0	n/a	3	1	n/a	181	544	713
Total	1	0	n/a	6	15	40	319	52	1,250
Atlantic									
Wheat	83	0	n/a	191	2	n/a	n/a	650	341
Corn	0	0	n/a	2	50	4	10	6	143
Soybeans	24	77	31	552	270	205	234	114	1,460
Total	107	77	139	746	321	232	354	158	1,944
U.S. total from ports²									
Wheat	759	680	112	5,501	4,797	115	120	115	26,040
Corn	393	412	95	3,123	7,838	40	40	36	30,230
Soybeans	466	1,099	42	10,258	9,664	106	95	88	42,035
Total	1,618	2,191	74	18,883	22,300	85	81	74	98,305

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

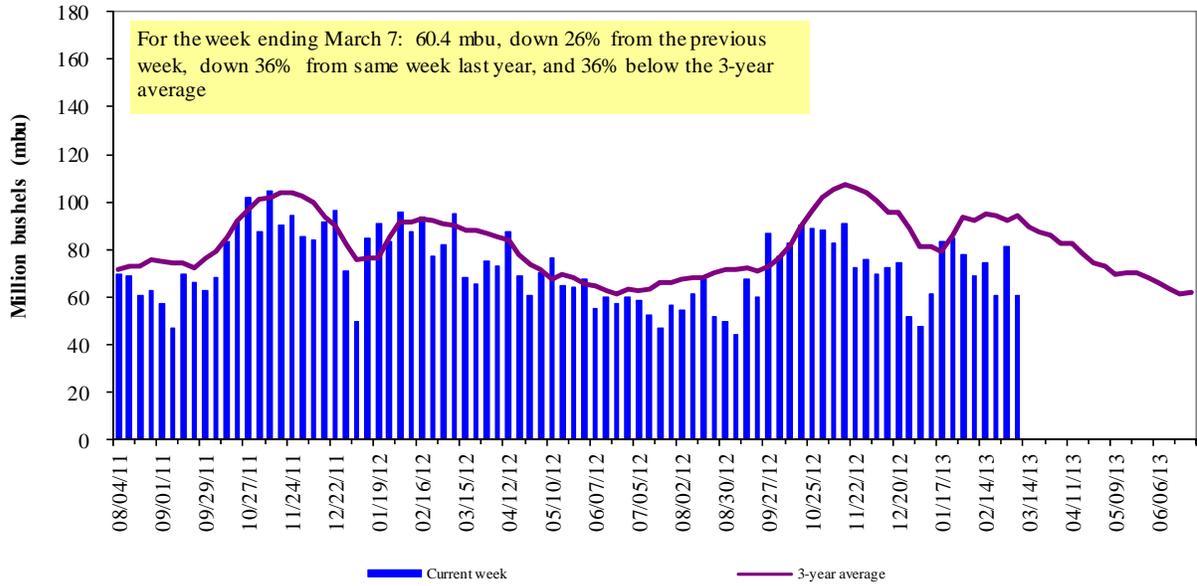
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

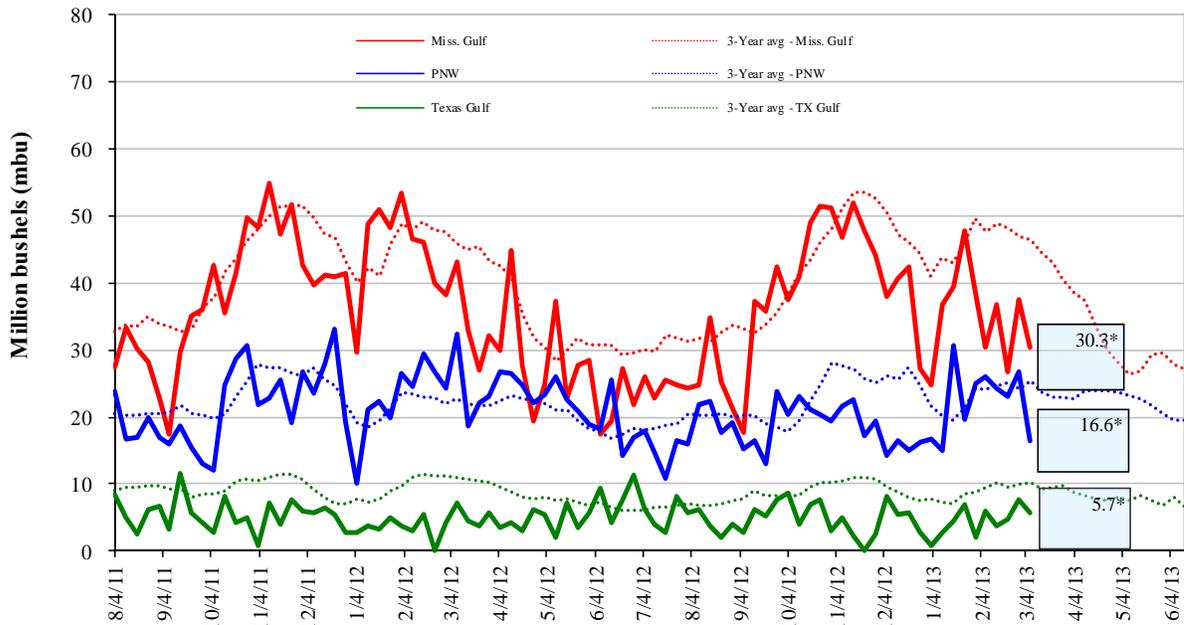


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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>March 7 % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 19	down 25	down 20	down 38
Last year (same week)	down 30	down 21	down 28	down 49
3-yr avg. (4-wk mov. avg.)	down 35	down 36	down 36	down 32

Ocean Transportation

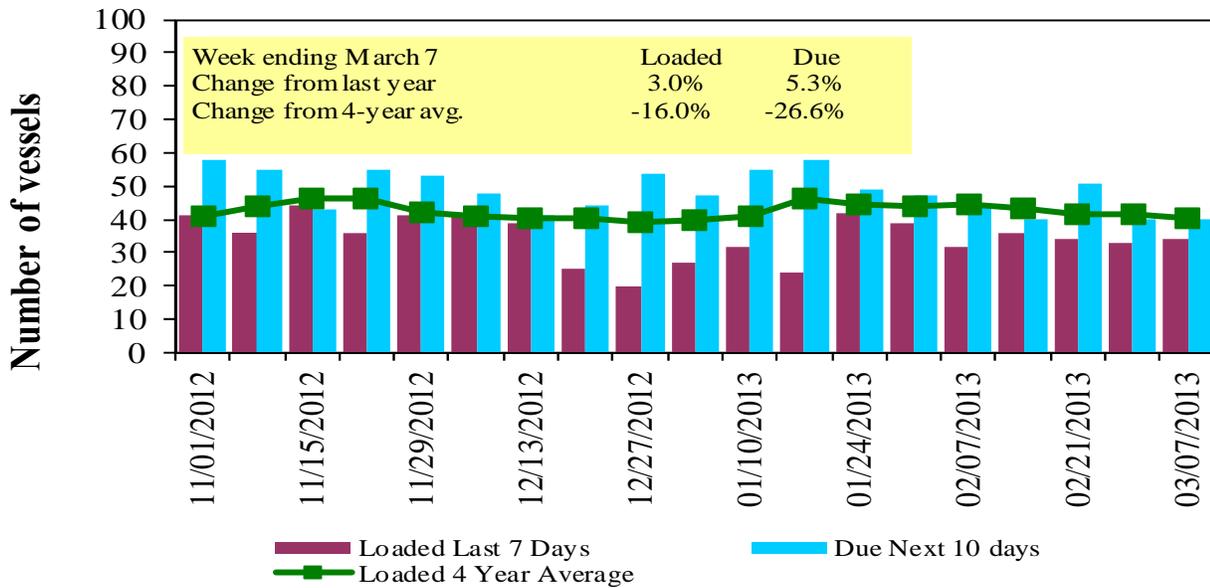
Table 17

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
3/7/2013	22	34	40	12	n/a
2/28/2013	28	33	40	16	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

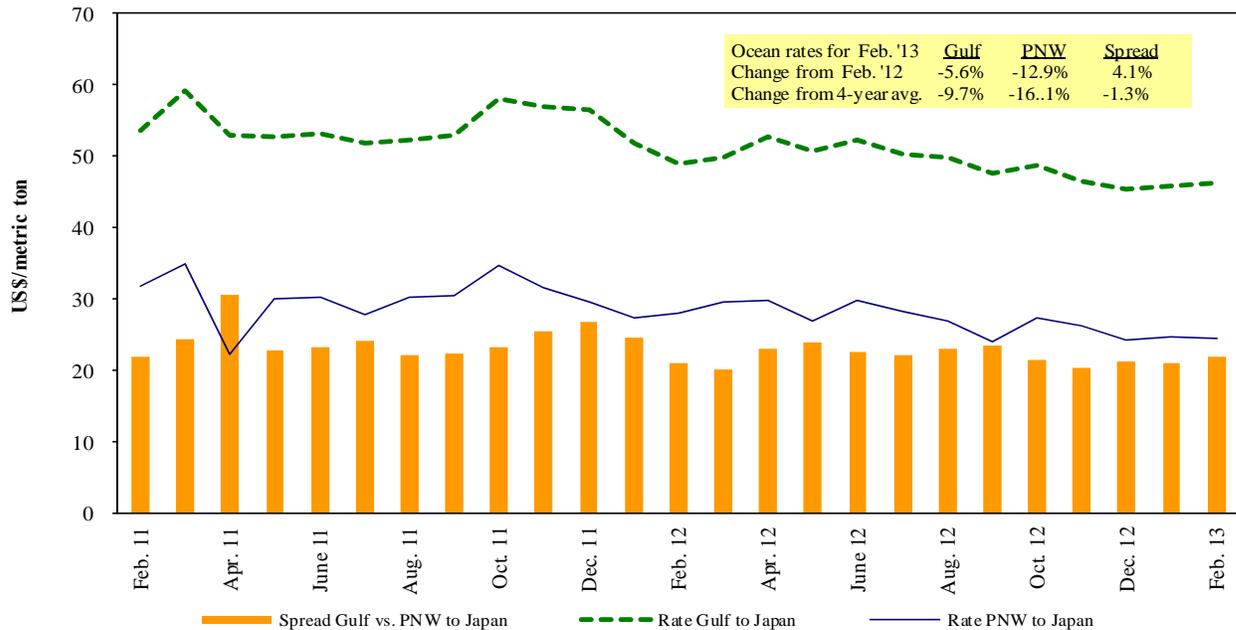
Figure 16
U.S. Gulf^d Vessel Loading Activity



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 03/09/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 25/Fe 5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Jan 15/25	55,000	42.75
U.S. Gulf	China	Heavy Grain	Jan 25/Feb5	55,000	43.05
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
U.S. Gulf	China	Heavy Grain	Feb 1/5	54,000	20.50
U.S. Gulf	Ethiopia ¹	Wheat	Mar 11/21	21,000	44.62
PNW	China	Heavy Grain	Feb 1/5	54,000	20.50
Australia	Italy	Heavy Grain	Feb 10/25	58,000	27.00
Brazil	China	Heavy Grain	March 5/25	60,000	40.25
Brazil	China	Heavy Grain	Mar 1/10	60,000	38.25
Brazil	China	Heavy Grain	Mar 3/12	60,000	35.00
Brazi	China	Heavy Grain	May 1/5	60,000	35.35
Brazil	China	Heavy Grain	Feb 19/22	60,000	34.50
Brazil	China	Heavy Grain	Feb 10/19	60,000	35.50
Brazil	China	Heavy Grain	Feb 8/23	60,000	35.50
France	Algeria	Wheat	Feb 20/25	30,000	18.50

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

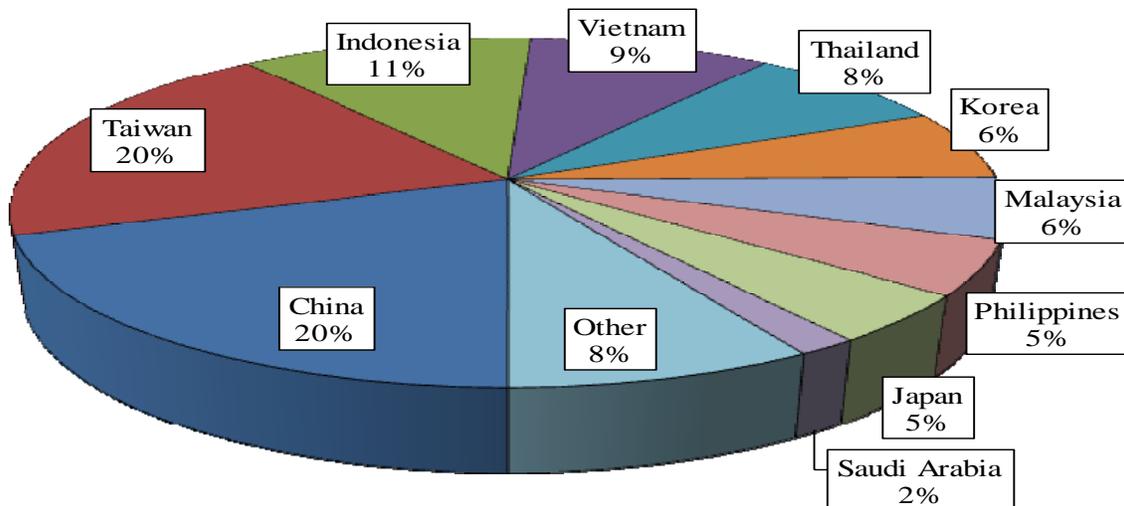
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, December 2012

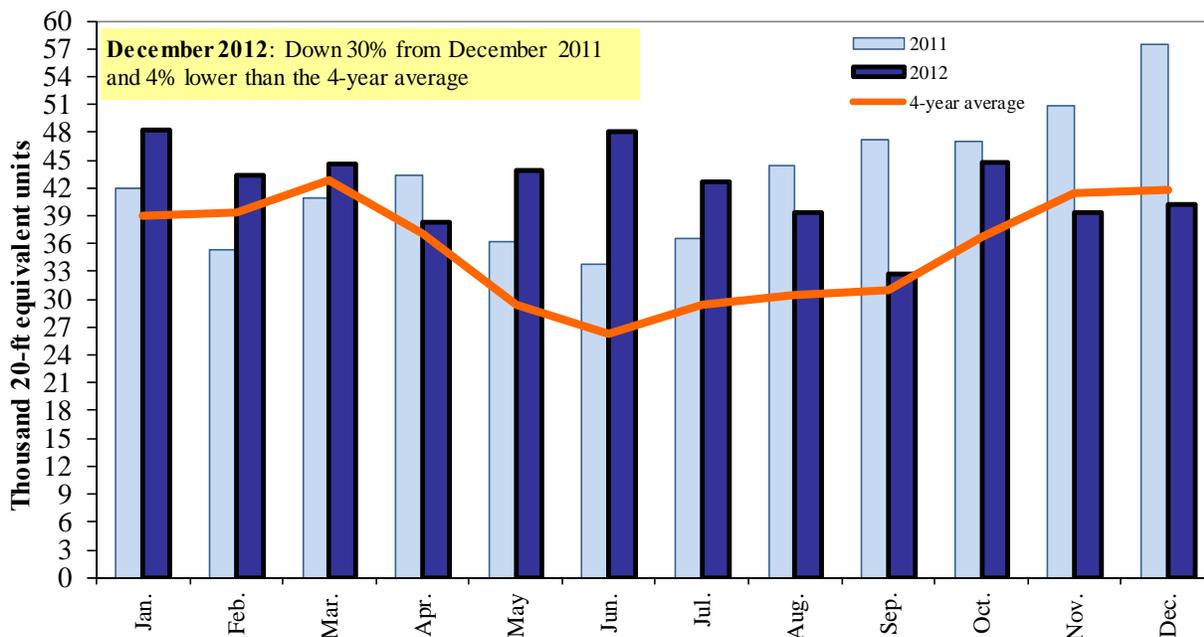


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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