



Agricultural  
Marketing  
Service



A weekly publication of the  
Transportation and Marketing Programs/Transportation Services Division  
[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

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March 22, 2012

## WEEKLY HIGHLIGHTS

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#### U.S.-Korea Trade Agreement Implemented

[On March 15, almost two-thirds of U.S. farm exports to Korea became duty-free.](#) These include wheat, corn, and soybeans for crushing. Other farm products that will benefit from immediate duty-free access within new tariff-rate quotas include barley, popcorn, soybeans for food use, and hay. Korean tariff reductions on U.S. beef over 15 years and pork over 4 years will likely increase the demand for U.S. beef and pork, and consequently increase the domestic demand for U.S. grain and feed. Agriculture Secretary Tom Vilsack stated that over the next few years, agricultural exports to Korea should grow by \$1.9 billion and help support 16,000 jobs. In calendar year 2011, U.S. agricultural exports to Korea were nearly \$7 billion, including over \$2.5 billion of wheat, corn, and soybeans.

#### Upper Mississippi River Navigation Season Opens for 2012

On March 17, the U.S. Army Corps of Engineers announced the opening of 2012 Upper Mississippi River navigation season as the first upbound tow boat and barges arrived in St. Paul, MN. The average opening date of the navigation season for the last 30 years has been March 20. The earliest date for the opening of the navigation season was March 4, in 1984, 2000, and 2001; the latest date was April 7, 1978.

#### Grain Inspections Recede, but Export Prospects Good

For the week ending March 15, **total inspections of grain** (corn, wheat, and soybeans) reached 1.81 mmt, down 28 percent from the past week and 22 percent below last year at this time. This was the lowest level of grain inspections since January 5 (1.32 mmt), but continued growth in grain export sales commitments bodes well for a rebound in the near future. Wheat inspections (.572 mmt) dropped 34 percent from the previous week as shipments to Nigeria and Asia receded. Total inspections of wheat, however, were 5 percent above the 4-week running average due to steady export sales (outstanding). Corn inspections (.590 mmt) dropped 40 percent as shipments to Asia decreased. Soybean inspections (.646 mmt) decreased only 3 percent from the past week and were shipped primarily to Asia. However, during the week ending March 8, **corn export commitments** reached 32.1 mmt, adding 12 percent more export sales than the average over the previous 4 weeks. Wheat and soybean commitments also increased, but were not higher than the past 4 weeks.

#### Port of Long Beach Receives Its Largest Container Ship

The largest container ship ever to call on North America, the MSC Fabiola, docked at the Port of Long Beach on March 16. The MSC Fabiola is capable of carrying 12,500 TEUs and is the first of the larger container ships expected to serve the Asia-North America route. Currently, the container ships serving this route have capacities of 8,000 TEUs. The Port of Long Beach's main channel is 76 feet deep and is one of the few ports in the world that can handle these ships. The Port is planning to spend \$4.5 billion over the next decade on modernization projects, including construction of a new technologically advanced container terminal, replacement of the Gerald Desmond Bridge with a higher span to accommodate larger ships, and adding 65,000 feet of rail track.

### Snapshots by Sector

#### **Rail**

U.S. railroads originated 21,167 **carloads of grain** during the week ending March 10, down 5 percent from last week, 7 percent from last year, and 5 percent lower than the 3-year average.

During the week ending March 15, average April shuttle **secondary railcar bids/offers per car** were \$203 below tariff, up \$72 from last week and \$40.50 lower than last year. There were no non-shuttle bids/offers this week.

#### **Ocean**

During the week ending March 15, 36 **ocean-going grain vessels** were loaded in the Gulf, down 33 percent from last year. Forty vessels are expected to be loaded within the next 10 days, 33 percent less than the same period last year.

During the week ending March 16, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$49 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$29 per mt, down 3 percent from the previous week.

#### **Barge**

During the week ending March 17, **barge grain movements** totaled 366,624 tons, 36 percent lower than the previous week and 40 percent lower than the same period last year.

During the week ending March 17, 232 grain barges **moved down river**, down 37 percent from last week, and 457 grain barges were **unloaded in New Orleans**, down 7 percent from the previous week.

#### **Fuel**

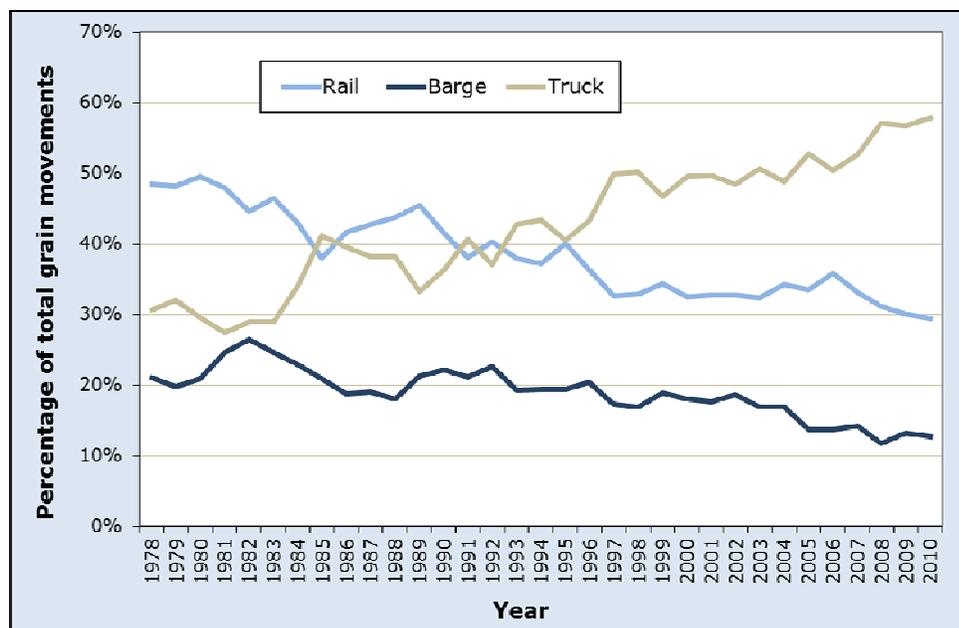
During the week ending March 19, U.S. average **diesel fuel prices** increased 2 cents to \$4.14 per gallon—24 cents higher than the same week last year.

## Transportation of U.S. Grains: A Modal Share Analysis, 1978-2010 Update

On March 7, USDA’s Agricultural Marketing Service issued an updated modal share report, [Transportation of U.S. Grains: A Modal Share Analysis, 1978-2010 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 2010 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 2008, 2009, and 2010. 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 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-starch ethanol production, which is concentrated within trucking distance of where the corn is grown.

**Figure 1: U.S. grain modal shares, 1978-2010**



The availability of modal share data for domestic and export movements provides insight on grain transportation demand. Table 1 shows a summary of modal shares for each of the three major grains for 2010 compared with the average for the 5 years from 2006–2010. The leading mode of transport for exporting corn and soybeans is barge, and export wheat is likely to be transported by rail. For domestic traffic of corn and soybeans, trucks are the principal mode of transport. Domestic wheat is primarily transported by rail. Export corn moves by barge to port for eventual overseas transport to foreign markets. An increase in corn exports

will generally cause an increase in the volume of barge movements and an increase in the percentage of corn moved by barge. An increase in wheat destined for the export markets will probably show an increase in wheat rail shipments and an increase in the percent of wheat moved by rail. Although the recent trend in soybean exports has been nearly equally split between barge and rail transportation, barge leads with a slightly higher modal share.

Table 1 – Modal share of corn, wheat, and soybeans, by market, 2010 and 5-year average

Year Mode	Corn			Wheat			Soybeans		
	Exports	Domestic	All Corn	Exports	Domestic	All Wheat	Exports	Domestic	All Soybeans
<b>2010</b>									
Rail	40	19	22	72	68	70	44	12	27
Barge	57	1	10	26	1	13	47	3	24
Truck	3	81	68	3	31	17	8	85	50
<b>5-Year average</b>									
Rail	38	23	26	70	74	72	42	12	25
Barge	53	1	11	28	1	14	46	2	20
Truck	9	76	63	2	25	14	13	85	55

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 has led to an increase in domestic grain traffic while export traffic has been rather stable. However, from 2006 to 2010, export soybean movements increased every year. USDA’s Economic Research Service attributes China’s growing demand for soybeans as a major cause for the increase in U.S. soybean exports. “China’s soybean imports have risen sharply and now account for more than half of world trade. China mostly will import oilseeds for crushing rather than large amounts of oilseed meals and oil. This affects the composition of world trade by raising global import demand for oilseeds rather than for oilseed products.”<sup>1</sup>

**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 minor revisions of data going back to 1996. 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 2008–2010 data, the previous version containing the complete methodology, and accompanying datasets can be viewed at [Transportation of U.S. Grains: A Modal Share Analysis, 1978-2010 Update](#).

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<sup>1</sup> USDA-ERS Briefing Room, Agricultural Baseline Projections, <http://www.ers.usda.gov/Briefing/Baseline/>

# Grain Transportation Indicators

Table 1  
**Grain Transport Cost Indicators<sup>1</sup>**

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
03/21/12	281	227	192	201	219	206
03/14/12	277	227	196	192	219	213

<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)**

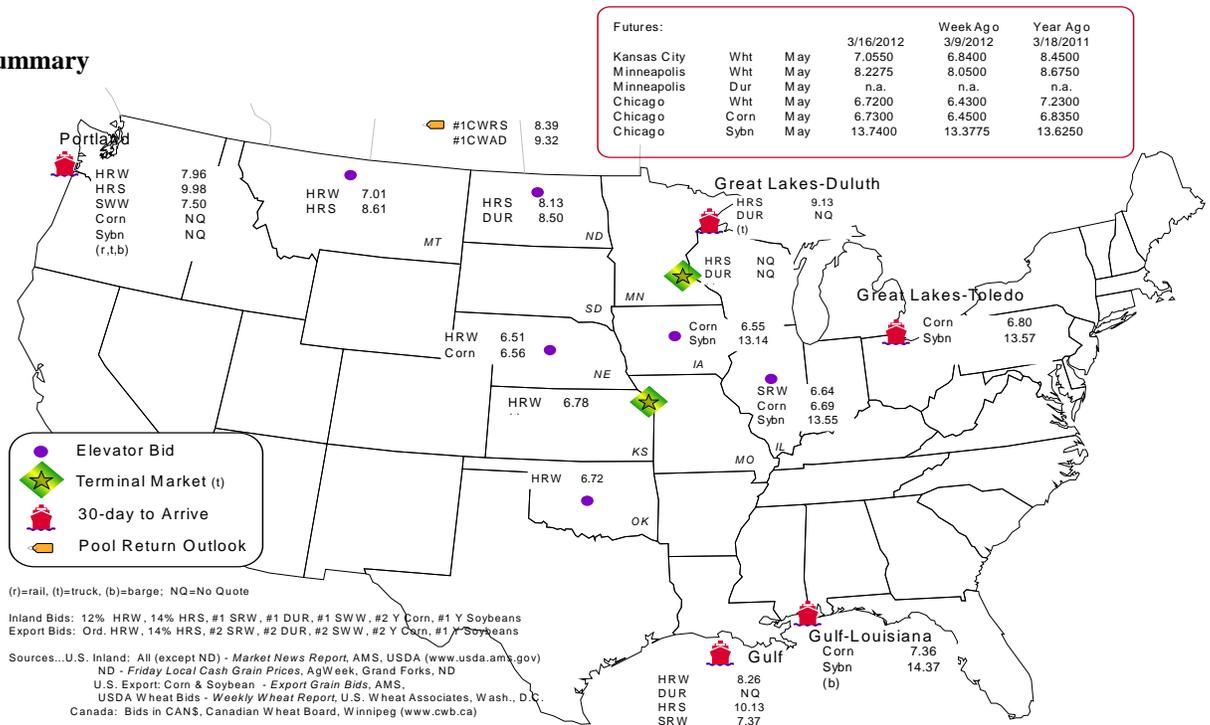
Commodity	Origin--Destination	3/16/2012	3/9/2012
Corn	IL--Gulf	-0.67	-0.66
Corn	NE--Gulf	-0.80	-0.84
Soybean	IA--Gulf	-1.23	-1.21
HRW	KS--Gulf	-1.48	-1.49
HRS	ND--Portland	-1.85	-1.78

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		Cross-Border	Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	East Gulf	
3/14/2012 <sup>p</sup>	328	684	1,399	3,294	419	6,124
3/07/2012 <sup>r</sup>	359	848	1,164	2,999	502	5,872
2012 YTD	3,108	7,589	12,243	33,619	5,474	62,033
2011 YTD	5,308	17,693	9,724	37,392	12,313	82,430
2012 YTD as % of 2011 YTD	59	43	126	90	44	75
Last 4 weeks as % of 2011 <sup>2</sup>	38	25	209	90	66	73
Last 4 weeks as % of 4-year avg. <sup>2</sup>	44	31	163	79	57	70
Total 2011	27,358	77,515	48,782	178,990	24,088	356,733
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933

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

<sup>2</sup> Compared with same 4-weeks in 2011 and prior 4-year average.

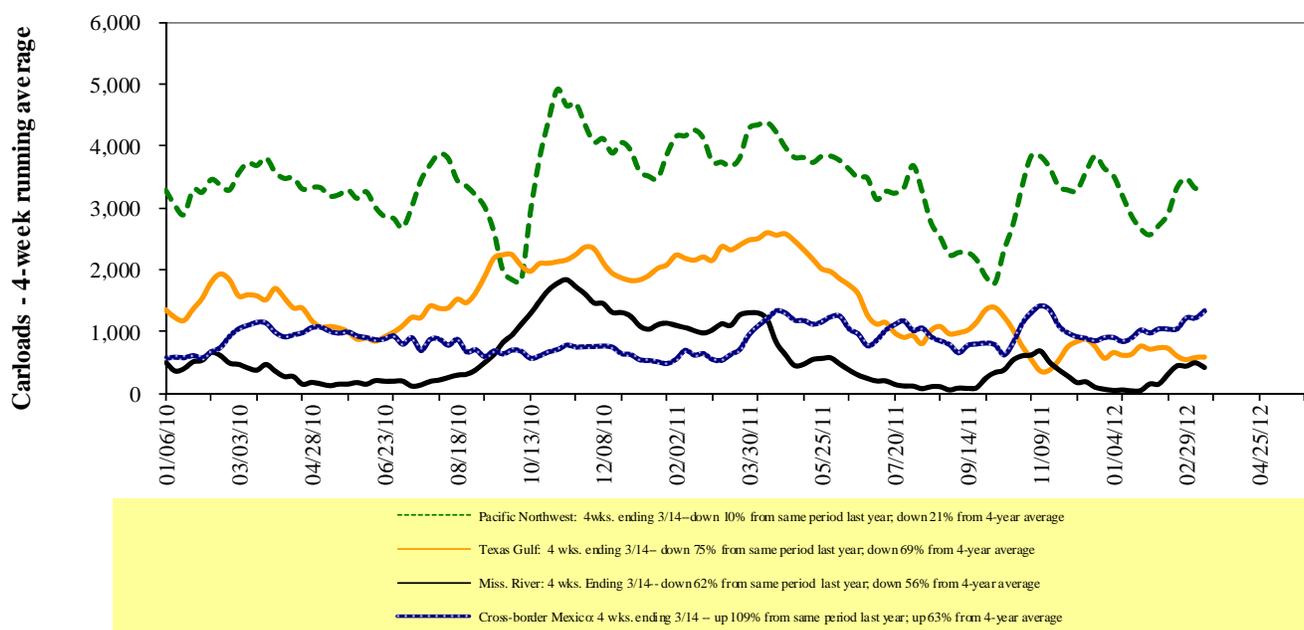
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

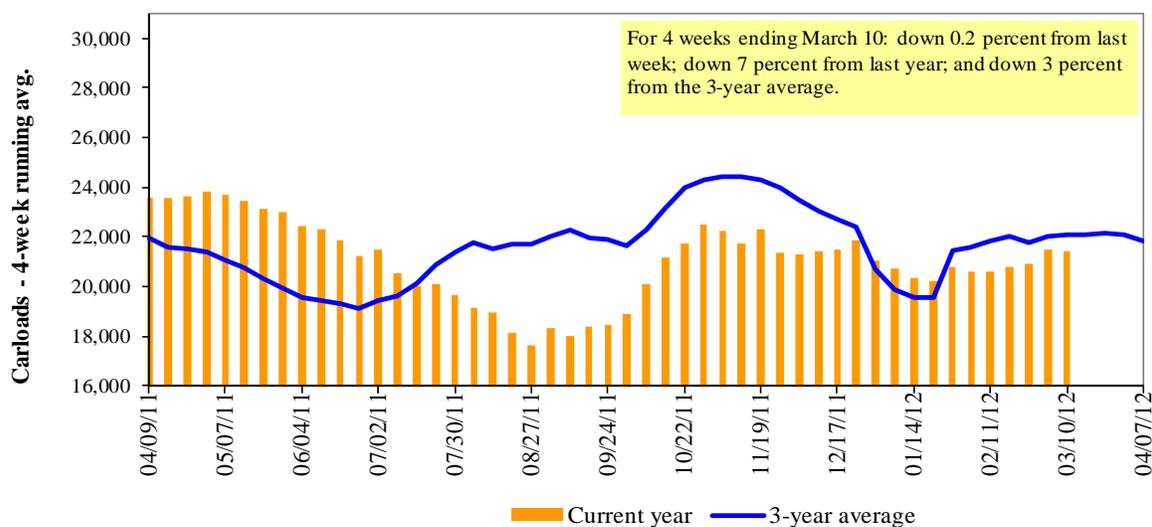
Table 4

**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
03/10/12	1,963	2,637	11,565	454	4,548	21,167	3,489	5,469
This week last year	2,229	3,201	10,510	559	6,188	22,687	4,135	4,341
2012 YTD	21,602	29,727	103,123	4,884	50,886	210,222	37,849	51,728
2011 YTD	21,775	29,958	114,109	5,815	62,396	234,053	38,407	44,800
2012 YTD as % of 2011 YTD	99	99	90	84	82	90	99	115
Last 4 weeks as % of 2011 <sup>1</sup>	108	97	98	77	80	93	97	117
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	94	99	104	61	89	97	91	102
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

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

Week ending	Delivery period							
	Apr-12	Apr-11	May-12	May-11	Jun-12	Jun-11	Jul-12	Jul-11
BNSF <sup>3</sup>								
COT grain units	no bids	no offer	no bids	no offer	no bids	3	no offer	9
COT grain single-car <sup>5</sup>	0	no offer	no bids	no offer	no bids	0 . . 21	no bids	0 . . 21
UP <sup>4</sup>								
GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no offer	no bids	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.

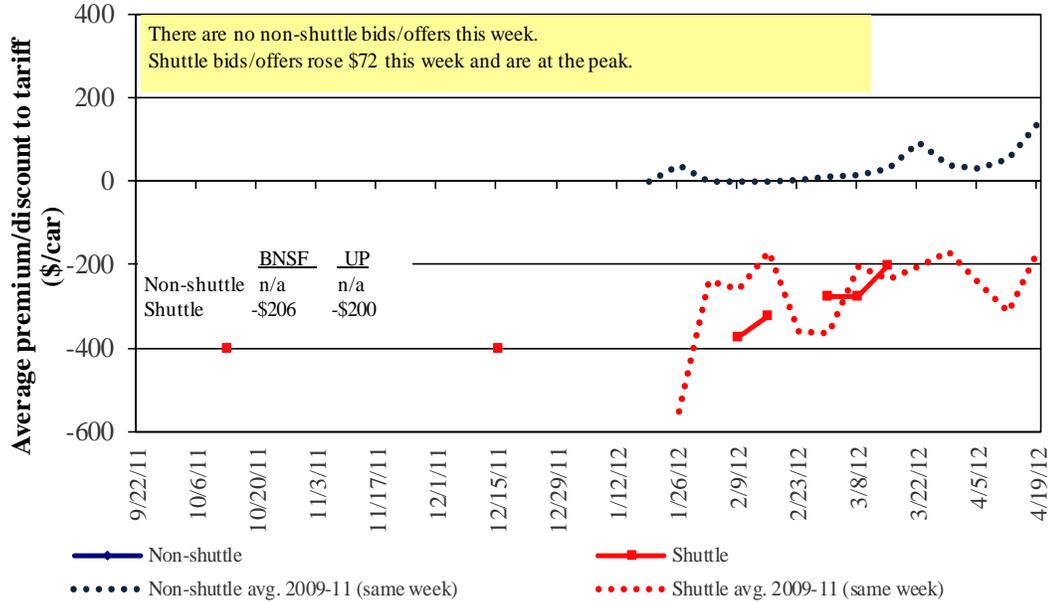
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 April 2012, Secondary Market**

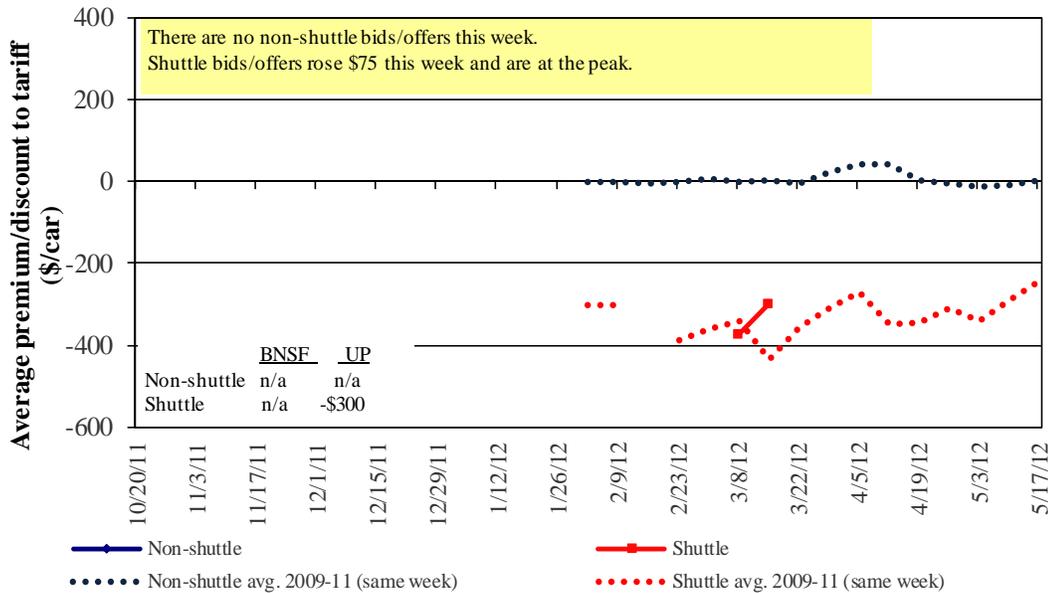


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in May 2012, Secondary Market**

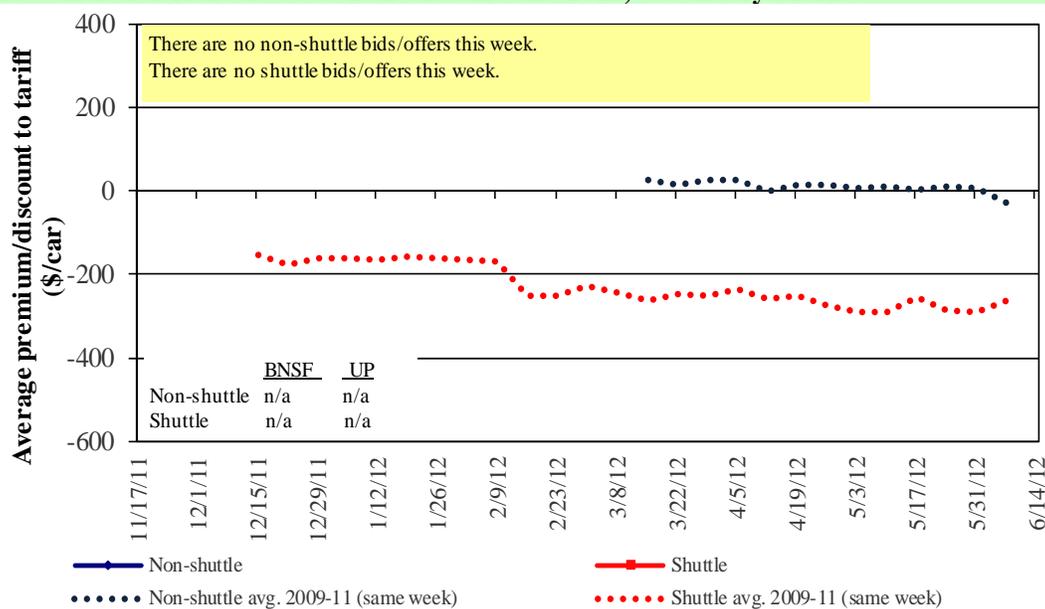


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

### Bids/Offers for Railcars to be Delivered in June 2012, 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					
	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12
<b>Non-shuttle</b>						
BNSF-GF	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 2011	n/a	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 2011	n/a	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(206)	n/a	n/a	n/a	n/a	(200)
Change from last week	n/a	n/a	n/a	n/a	n/a	-
Change from same week 2011	(206)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(200)	(300)	n/a	(300)	n/a	(200)
Change from last week	75	75	n/a	(25)	n/a	50
Change from same week 2011	125	100	n/a	(50)	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 Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

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

Effective date:				Fuel	Tariff plus surcharge per:		Percent
3/1/2012	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushe <sup>l</sup> <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$2,992	\$177	\$31.47	\$0.86	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,260	\$101	\$33.38	\$0.91	20
	Wichita, KS	Los Angeles, CA	\$5,895	\$520	\$63.71	\$1.73	15
	Wichita, KS	New Orleans, LA	\$3,492	\$312	\$37.77	\$1.03	5
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$427	\$59.58	\$1.62	10
	Northwest KS	Galveston-Houston, TX	\$3,760	\$341	\$40.73	\$1.11	5
	Amarillo, TX	Los Angeles, CA	\$3,959	\$475	\$44.03	\$1.20	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,038	\$352	\$33.67	\$0.92	10
	Toledo, OH	Raleigh, NC	\$4,382	\$398	\$47.47	\$1.29	18
	Des Moines, IA	Davenport, IA	\$1,934	\$75	\$19.95	\$0.54	6
	Indianapolis, IN	Atlanta, GA	\$3,821	\$299	\$40.91	\$1.11	20
	Indianapolis, IN	Knoxville, TN	\$3,273	\$192	\$34.41	\$0.94	19
	Des Moines, IA	Little Rock, AR	\$3,074	\$219	\$32.70	\$0.89	6
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,825	\$638	\$64.18	\$1.75	33
	Minneapolis, MN	New Orleans, LA	\$3,499	\$387	\$38.59	\$1.05	6
	Toledo, OH	Huntsville, AL	\$3,497	\$283	\$37.54	\$1.02	21
	Indianapolis, IN	Raleigh, NC	\$4,453	\$401	\$48.20	\$1.31	17
	Indianapolis, IN	Huntsville, AL	\$3,189	\$192	\$33.57	\$0.91	23
Champaign-Urbana, IL	New Orleans, LA	\$3,382	\$352	\$37.08	\$1.01	9	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,351	\$299	\$36.25	\$0.99	15
	Wichita, KS	Galveston-Houston, TX	\$3,247	\$233	\$34.56	\$0.94	11
	Chicago, IL	Albany, NY	\$3,645	\$374	\$39.91	\$1.09	6
	Grand Forks, ND	Portland, OR	\$4,832	\$517	\$53.12	\$1.45	17
	Grand Forks, ND	Galveston-Houston, TX	\$5,854	\$538	\$63.48	\$1.73	16
	Northwest KS	Portland, OR	\$4,727	\$560	\$52.50	\$1.43	5
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$629	\$53.92	\$1.47	19
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$576	\$52.99	\$1.44	18
	Champaign-Urbana, IL	New Orleans, LA	\$2,857	\$352	\$31.87	\$0.87	9
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$336	\$36.21	\$0.99	17
	Des Moines, IA	Amarillo, TX	\$3,430	\$275	\$36.80	\$1.00	5
	Minneapolis, MN	Tacoma, WA	\$4,800	\$624	\$53.87	\$1.47	19
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$646	\$48.12	\$1.31	24
	Sioux Falls, SD	Tacoma, WA	\$5,040	\$576	\$55.77	\$1.52	19
	Minneapolis, MN	Portland, OR	\$5,030	\$629	\$56.20	\$1.53	21
	Fargo, ND	Tacoma, WA	\$4,930	\$512	\$54.05	\$1.47	18
	Council Bluffs, IA	New Orleans, LA	\$3,710	\$406	\$40.87	\$1.11	8
	Toledo, OH	Huntsville, AL	\$2,672	\$283	\$29.34	\$0.80	7
Grand Island, NE	Portland, OR	\$5,115	\$573	\$56.48	\$1.54	15	

<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](http://www.bnsf.com), [www.cpr.ca](http://www.cpr.ca), [www.csx.com](http://www.csx.com), [www.uprr.com](http://www.uprr.com)

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change Y/Y <sup>4</sup>	
				surcharge per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup> bushel <sup>3</sup>		
Wheat	MT	Chihuahua, CI	\$7,741	\$547	\$84.68	\$2.30	15
	OK	Cuautitlan, EM	\$6,747	\$573	\$74.79	\$2.03	11
	KS	Guadalajara, JA	\$7,411	\$871	\$84.62	\$2.30	10
	TX	Salinas Victoria, NL	\$3,703	\$233	\$40.22	\$1.09	8
Corn	IA	Guadalajara, JA	\$7,699	\$875	\$87.60	\$2.22	11
	SD	Penjamo, GJ	\$7,776	\$715	\$86.76	\$2.20	20
	NE	Queretaro, QA	\$7,048	\$739	\$79.57	\$2.02	15
	SD	Salinas Victoria, NL	\$5,650	\$544	\$63.28	\$1.61	20
	MO	Tlalnepantla, EM	\$6,263	\$721	\$71.36	\$1.81	17
	SD	Torreon, CU	\$6,522	\$599	\$72.76	\$1.85	17
Soybeans	MO	Bojay (Tula), HG	\$6,926	\$761	\$78.54	\$2.14	13
	NE	Guadalajara, JA	\$7,904	\$875	\$89.70	\$2.44	15
	IA	El Castillo, JA <sup>5</sup>	\$8,255	\$711	\$91.61	\$2.49	19
	KS	Torreon, CU	\$6,396	\$595	\$71.43	\$1.94	14
Sorghum	OK	Cuautitlan, EM	\$5,670	\$543	\$63.48	\$1.61	22
	TX	Guadalajara, JA	\$6,653	\$465	\$72.73	\$1.85	17
	NE	Penjamo, GJ	\$7,426	\$817	\$84.23	\$2.14	18
	KS	Queretaro, QA	\$6,353	\$508	\$70.10	\$1.78	14
	NE	Salinas Victoria, NL	\$5,103	\$483	\$57.07	\$1.45	15
	NE	Torreon, CU	\$6,068	\$629	\$68.43	\$1.74	11

<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

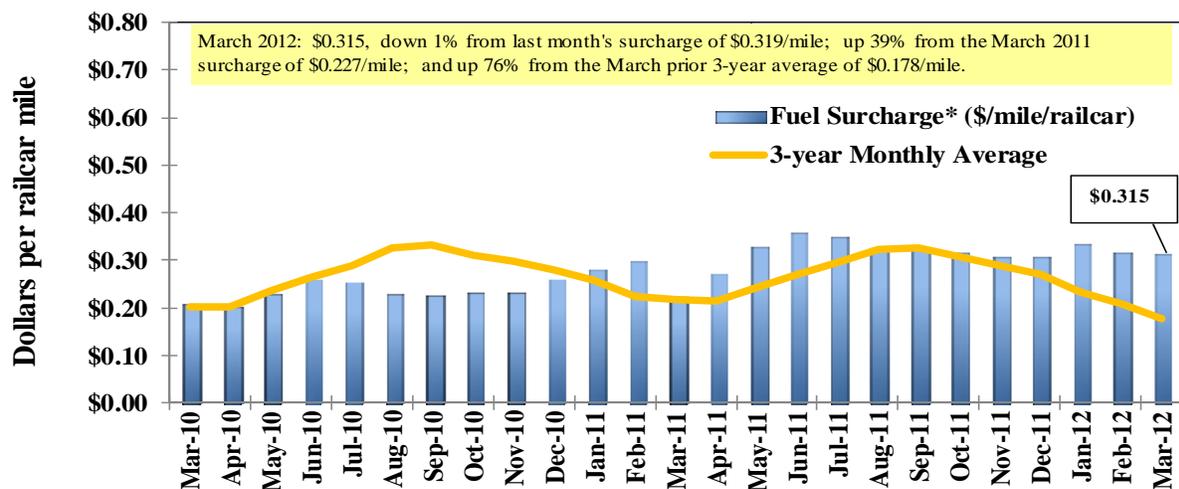
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

<sup>5</sup>Beginning 12/6/10, El Castillo, JA replaced Penjamo, GJ as the destination

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.

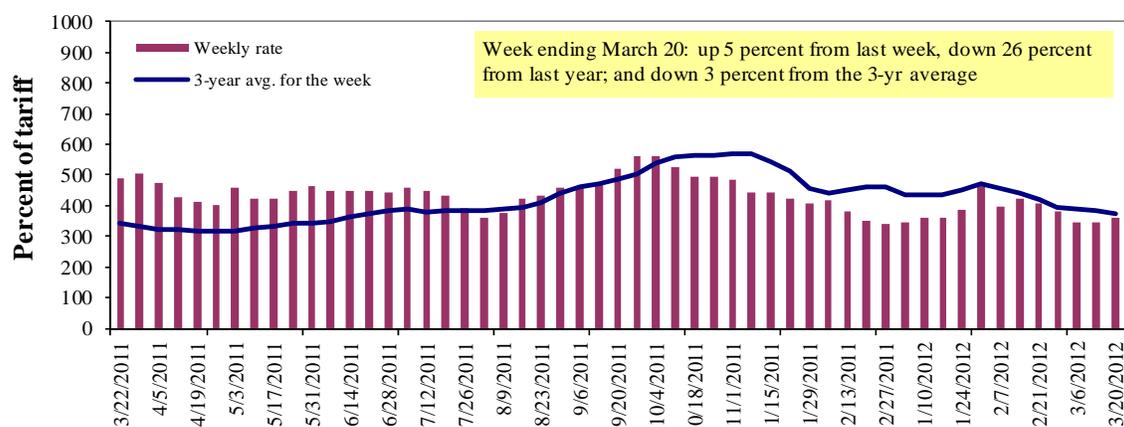
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

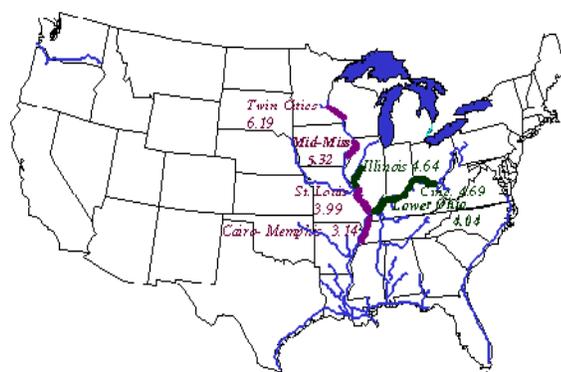
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
<b>Rate<sup>1</sup></b>	3/20/2012	433	378	362	258	310	310	223
	3/13/2012	--	380	345	252	313	313	222
<b>\$/ton</b>	3/20/2012	26.80	20.11	16.80	10.29	14.54	12.52	7.00
	3/13/2012	--	20.22	16.01	10.05	14.68	12.65	6.97
<b>Current week % change from the same week:</b>								
	Last year	--	-25	-26	-31	-30	-30	-36
	3-year avg. <sup>2</sup>	29	-5	-3	-12	0	0	-16
<b>Rate<sup>1</sup></b>	April	435	377	358	258	317	317	223
	June	428	378	358	260	322	322	240

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9  
Benchmark tariff rates

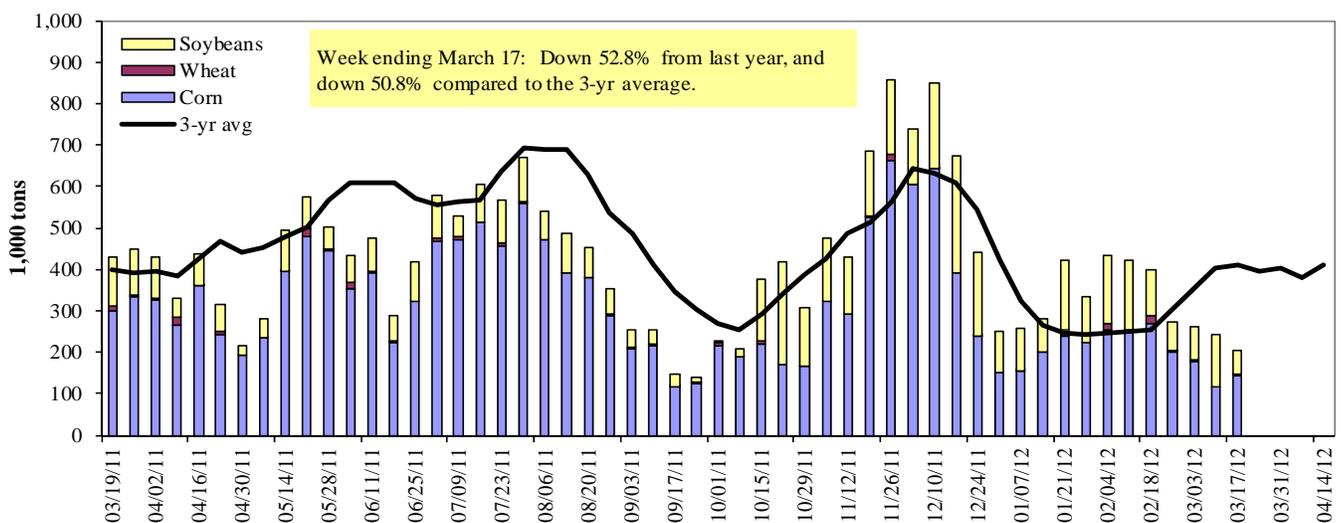


### Calculating barge rate per ton:

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

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 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 ([www.mvr.usace.army.mil/mvrirmi/omni/webreports/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webreports/default.asp))

Table 10

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

Week ending 3/17/2012	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	30	0	18	0	49
Winfield, MO (L25)	32	2	6	0	40
Alton, IL (L26)	141	5	45	5	195
Granite City, IL (L27)	144	5	54	0	203
<b>Illinois River (L8)</b>	133	2	49	5	188
<b>Ohio River (L52)</b>	55	3	56	5	119
<b>Arkansas River (L1)</b>	0	21	21	3	45
Weekly total - 2012	200	29	130	8	367
Weekly total - 2011	404	20	183	6	613
2012 YTD <sup>1</sup>	3,542	323	2,704	59	6,628
2011 YTD	3,401	203	2,382	76	6,062
2012 as % of 2011 YTD	104	159	114	78	109
Last 4 weeks as % of 2011 <sup>2</sup>	77	183	112	68	92
Total 2011	19,921	1,460	8,553	422	30,356

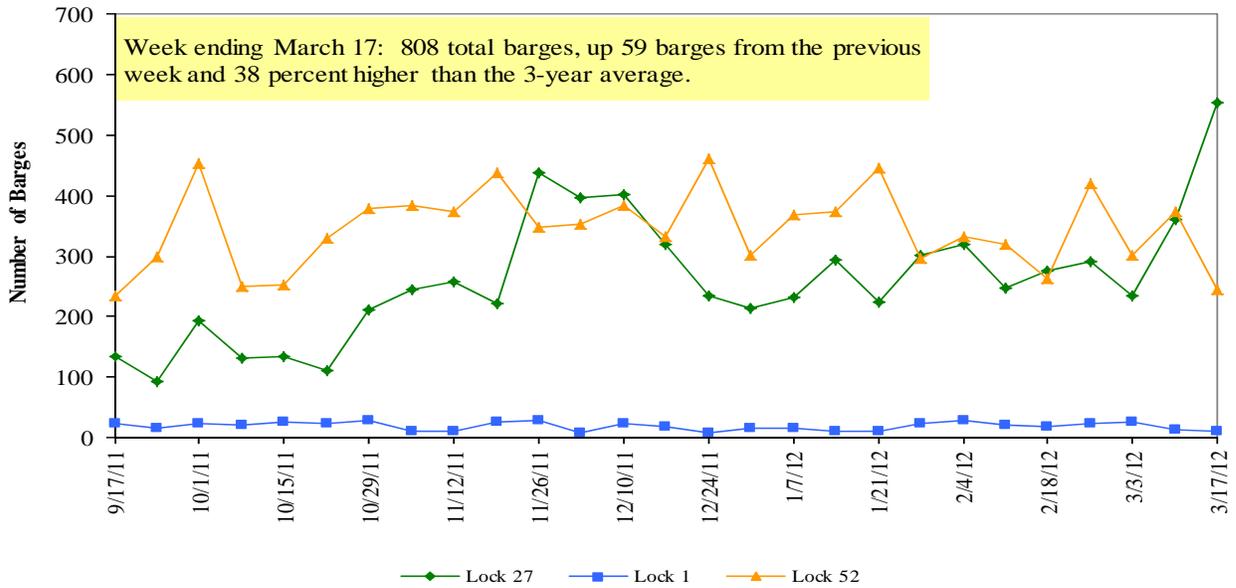
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

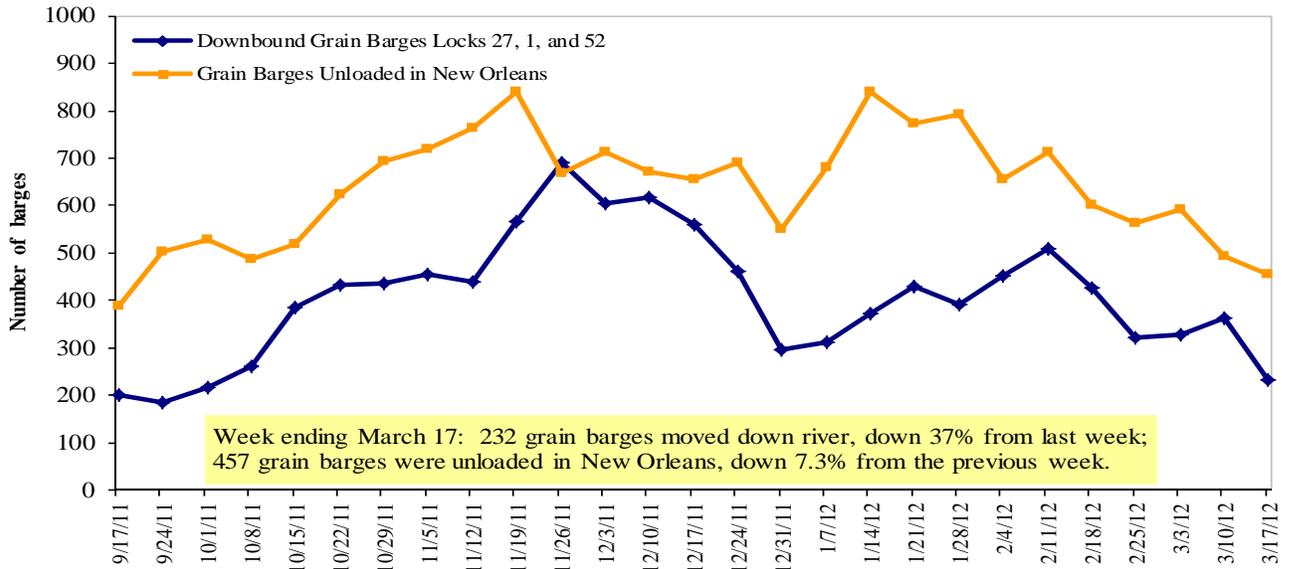
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrirmi/omni/webreports/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webreports/default.asp))

**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 3/19/2012 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.184	0.015	0.246
	New England	4.259	0.009	0.172
	Central Atlantic	4.269	0.022	0.223
	Lower Atlantic	4.106	0.010	0.228
II	Midwest <sup>2</sup>	4.040	0.024	0.185
III	Gulf Coast <sup>3</sup>	4.053	0.017	0.212
IV	Rocky Mountain	4.119	0.050	0.194
V	West Coast	4.431	0.010	0.327
	California	4.481	-0.002	0.282
Total	U.S.	4.142	0.019	0.235

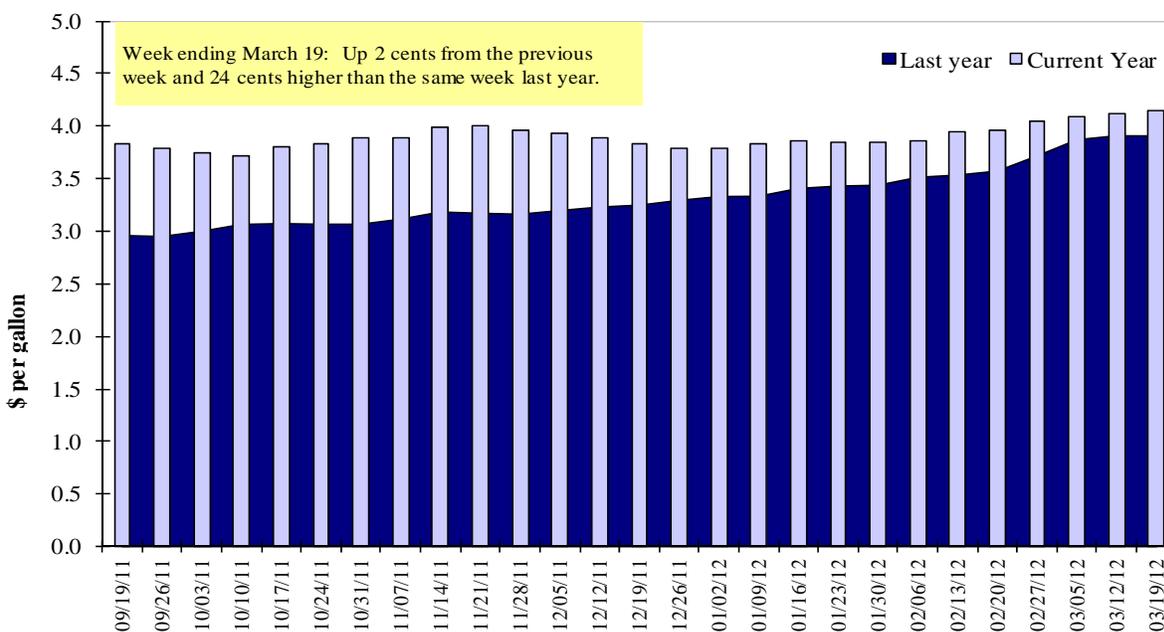
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

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

Figure 13

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



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

# Grain Exports

Table 12

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

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
3/8/2012	1,283	834	1,146	1,392	44	4,699	10,078	5,387	20,164
This week year ago	3,811	906	2,378	1,248	139	8,481	12,947	7,374	28,802
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2011/12 YTD	7,688	2,662	5,050	4,172	388	19,960	22,058	25,098	67,116
2010/11 YTD	11,679	1,819	6,170	3,553	750	23,970	22,536	32,583	79,089
YTD 2011/12 as % of 2010/11	66	146	82	117	52	83	98	77	85
Last 4 wks as % of same period 2010/11	34	101	52	131	21	60	80	76	73
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385

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

<sup>2</sup> Shipped export sales to date; the new marketing year is now in effect 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 Importers<sup>1</sup> of U.S. Corn

Week ending 03/08/12	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
- 1,000 mt -				
Japan	8,656	10,524	(18)	14,279
Mexico	8,186	6,140	33	7,019
Korea	3,250	3,736	(13)	6,104
China*	3,794	314	1,109	978
Taiwan	1,302	1,952	(33)	2,393
<b>Top 5 importers</b>	<b>25,187</b>	<b>22,666</b>	<b>11</b>	<b>30,772</b>
<b>Total US corn export sales</b>	<b>31,299</b>	<b>34,446</b>	<b>(9)</b>	<b>46,600</b>
% of Projected	72%	74%		
Change from Last Week	446	477		
<b>Top 5 importers' share of U.S. corn export sales</b>	<b>80%</b>	<b>66%</b>		
<b>USDA forecast, March 2012</b>	<b>43,180</b>	<b>46,600</b>	<b>(7)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol March 2012</b>	<b>127,000</b>	<b>127,534</b>	<b>(0.4)</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.

<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

\*China -- New to the Top 5 in the 2011/12 Marketing Year, replacing Egypt.

Table 14

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

Week Ending 03/08/2012	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	20,348	24,950	(18)	24,445
Mexico	2,171	2,319	(6)	3,215
Japan	1,404	1,858	(24)	1,887
EU	829	2,599	(68)	2,607
Indonesia	1,027	1,039	(1)	1,397
<b>Top 5 importers</b>	<b>25,779</b>	<b>32,765</b>	<b>(21)</b>	<b>33,551</b>
<b>Total US soybean export sales</b>	<b>30,485</b>	<b>39,957</b>	<b>(24)</b>	<b>40,860</b>
% of Projected	88%	98%		
Change from last week	610	147		
<b>Top 5 importers' share of U.S. soybean export sales</b>	85%	82%		
<b>USDA forecast, March 2012</b>	<b>34,700</b>	<b>40,860</b>	<b>(15)</b>	
<b>Soybean Use for Biodiesel USDA forecast, March 2012</b>	<b>8,632</b>	<b>6,115</b>	<b>41</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 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.<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 15

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

Week Ending 03/08/2012	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	2,815	3,022	(7)	3,233
Japan	3,353	3,451	(3)	3,148
Mexico	3,242	2,550	27	2,601
Philippines	1,929	1,864	3.5	1,518
Korea	1,773	1,536	15	1,111
Peru	571	922	(38)	923
Taiwan	830	870	(5)	913
Colombia	448	735	(39)	783
Indonesia	730	676	8	781
Yemen	417	673	(38)	659
<b>Top 10 importers</b>	<b>16,107</b>	<b>16,297</b>	<b>(1.2)</b>	<b>15,670</b>
<b>Total US wheat export sales</b>	<b>24,659</b>	<b>32,451</b>	<b>(24)</b>	<b>35,080</b>
% of Projected	91%	93%		
Change from last week	302	663		
<b>Top 10 importers' share of U.S. wheat export sales</b>	65%	50%		
<b>USDA forecast, March 2012</b>	<b>27,220</b>	<b>35,080</b>	<b>(22)</b>	

(n) indicates negative number.

<sup>1</sup>Modified from the FAS 2010/11 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.<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 03/15/12	Previous Week <sup>1</sup>	Current Week as % of Previous	2012 YTD <sup>1</sup>	2011 YTD <sup>1</sup>	2012 YTD as % of 2011 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2011
							2011	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	308	447	69	2,909	2,675	109	147	160	13,995
Corn	0	225	0	1,194	1,493	80	93	81	9,198
Soybeans	195	196	99	2,716	2,224	122	134	106	7,321
<b>Total</b>	<b>503</b>	<b>868</b>	<b>58</b>	<b>6,819</b>	<b>6,392</b>	<b>107</b>	<b>129</b>	<b>117</b>	<b>30,513</b>
<b>Mississippi Gulf</b>									
Wheat	111	236	47	1,162	1,142	102	97	119	5,031
Corn	394	495	80	5,194	5,458	95	73	71	26,267
Soybeans	363	407	89	6,282	7,331	86	81	98	19,262
<b>Total</b>	<b>868</b>	<b>1,138</b>	<b>76</b>	<b>12,638</b>	<b>13,930</b>	<b>91</b>	<b>79</b>	<b>86</b>	<b>50,560</b>
<b>Texas Gulf</b>									
Wheat	118	166	71	1,074	3,119	34	32	47	10,837
Corn	1	28	3	92	284	32	39	28	1,021
Soybeans	0	0	n/a	0	760	0	0	0	926
<b>Total</b>	<b>119</b>	<b>193</b>	<b>62</b>	<b>1,166</b>	<b>4,163</b>	<b>28</b>	<b>28</b>	<b>37</b>	<b>12,784</b>
<b>Interior</b>									
Wheat	34	15	224	212	303	70	72	113	1,110
Corn	195	220	89	1,877	1,170	160	84	143	7,509
Soybeans	48	54	90	936	835	112	86	96	4,273
<b>Total</b>	<b>278</b>	<b>289</b>	<b>96</b>	<b>3,025</b>	<b>2,308</b>	<b>131</b>	<b>83</b>	<b>124</b>	<b>12,892</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	0	14	0	0	0	1,038
Corn	0	0	n/a	14	0	n/a	n/a	0	178
Soybeans	0	0	n/a	0	0	n/a	n/a	0	382
<b>Total</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>15</b>	<b>14</b>	<b>109</b>	<b>0</b>	<b>0</b>	<b>1,598</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	2	274	1	0	0	686
Corn	0	12	0	50	75	66	63	52	295
Soybeans	39	10	392	312	318	98	79	80	1,042
<b>Total</b>	<b>39</b>	<b>22</b>	<b>178</b>	<b>363</b>	<b>666</b>	<b>54</b>	<b>72</b>	<b>62</b>	<b>2,022</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	572	864	66	5,358	7,525	71	84	105	32,697
Corn	590	980	60	8,420	8,480	99	86	80	44,466
Soybeans	646	668	97	10,246	11,467	89	87	95	33,205
<b>Total</b>	<b>1,808</b>	<b>2,511</b>	<b>72</b>	<b>24,025</b>	<b>27,473</b>	<b>87</b>	<b>85</b>	<b>91</b>	<b>110,369</b>

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

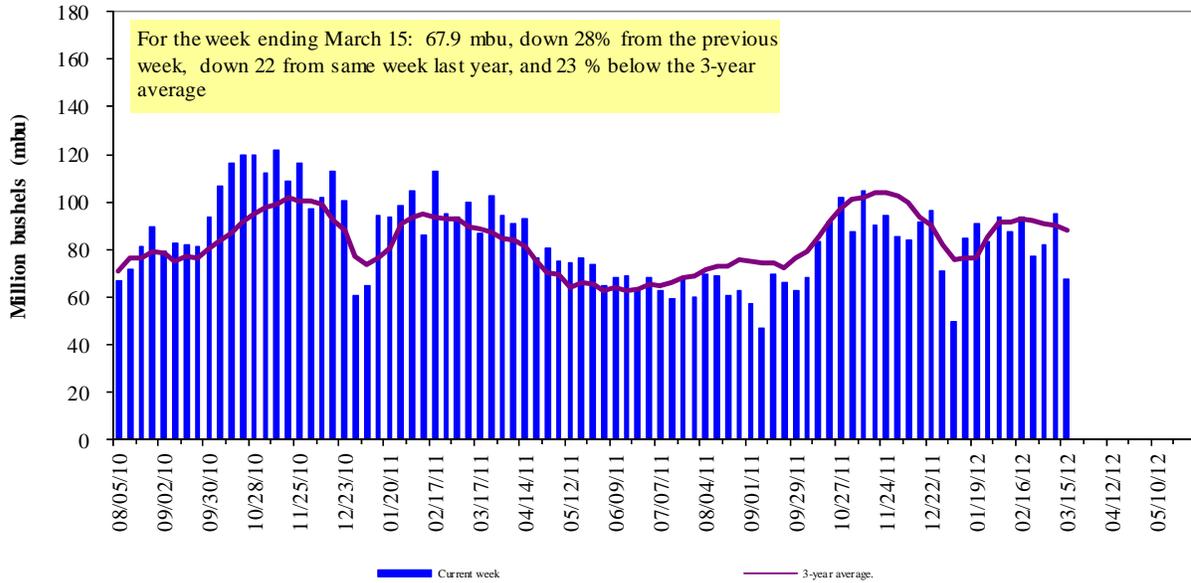
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

Source: Grain Inspection, Packers and Stockyards Administration/USDA ([www.gipsa.usda.gov](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 2011.

Figure 14

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

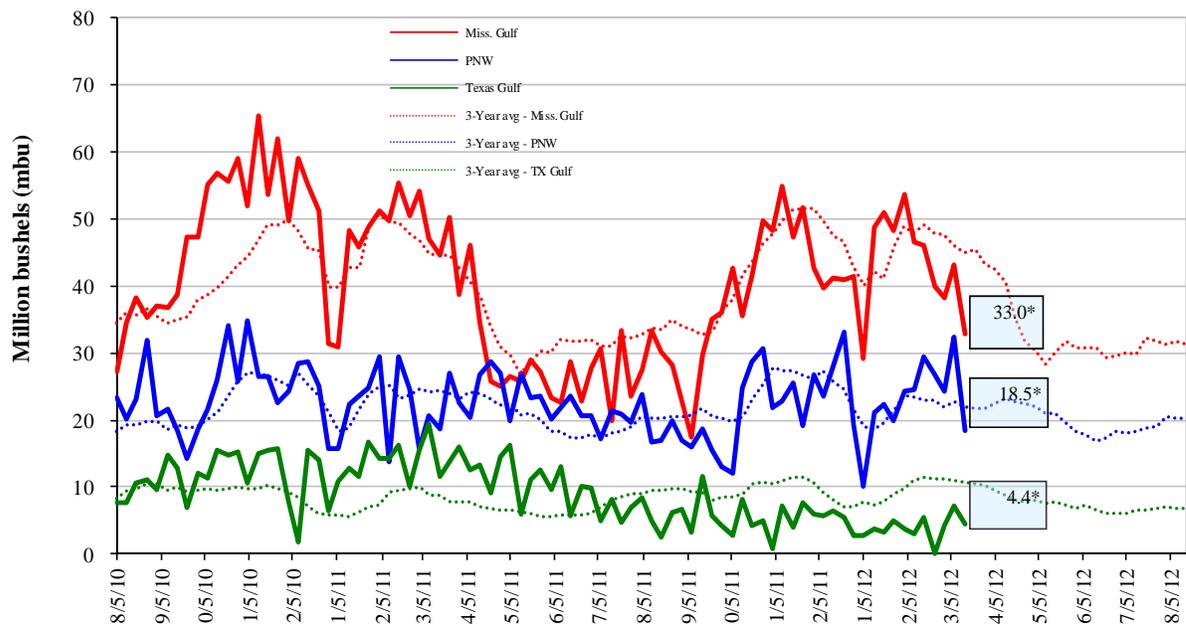


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

March 15 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 24	down 39	down 25	down 43
Last year (same week)	down 26	down 63	down 34	down 2
3-yr avg. (4-wk mov. avg.)	down 27	down 59	down 33	down 10

# Ocean Transportation

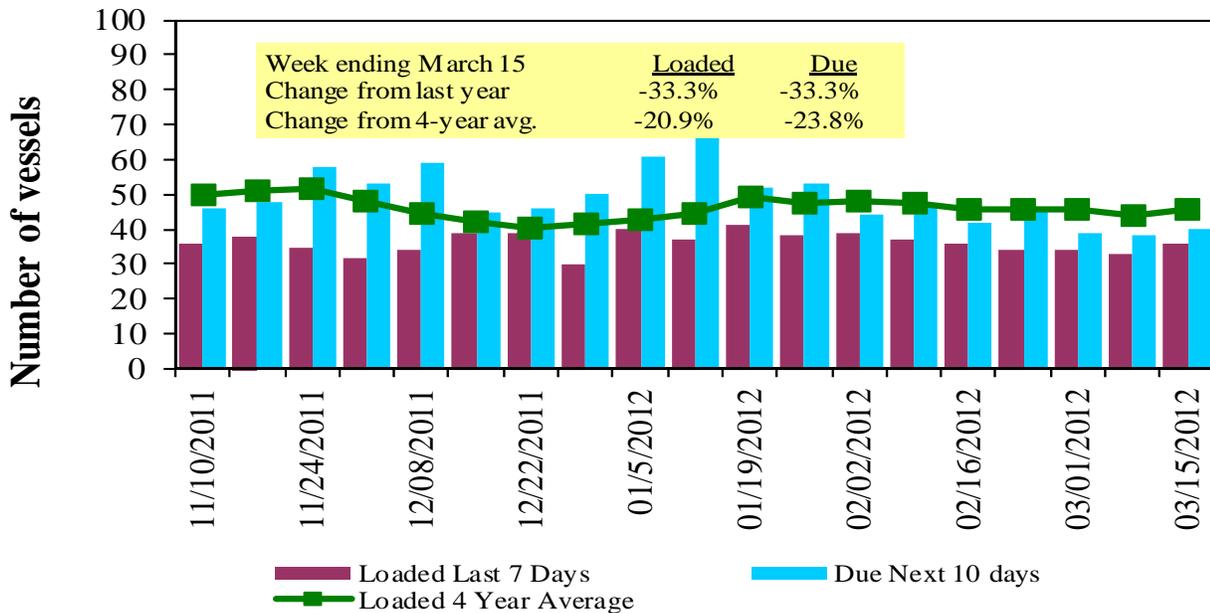
Table 17

**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
3/15/2012	25	36	40	8	n/a
3/8/2012	33	33	38	15	n/a
2011 range	(14..65)	(28..54)	(34..83)	(5..25)	(1..20)
2011 avg.	31	38	53	15	12

Source: Transportation & Marketing Programs/AMS/USDA

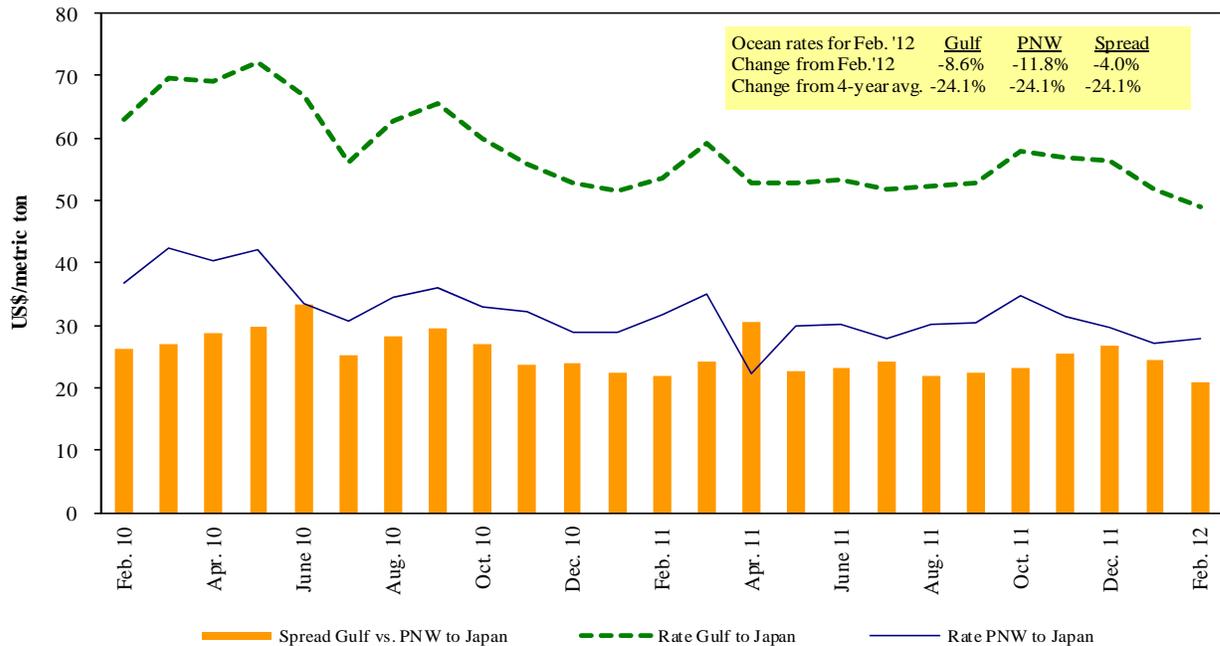
**Figure 16**  
**U.S. Gulf<sup>1</sup> Vessel Loading Activity**



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 3/17/2012**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Mar 1/10	50,000	46.65
U.S. Gulf	Korea	Heavy Grain	Mar 1/10	55,000	46.00
U.S. Gulf	Japan	Heavy Grain	Apr 1/10	58,000	46.00
U.S. Gulf	Tunisia	Soybeans	Jan 10/15	30,000	37.50
U.S. Gulf	Turkey	Heavy Grain	Feb 25/28	50,000	25.00
U.S. Gulf	Kenya <sup>1</sup>	Wheat	Jan 16/25	11,000	188.00
PNW	China	Grain	Jan 10/20	55,000	26.75
Australia	Vietnam	Grain	Mar 1/10	60,000	19.00
Brazil	Tunisia	Wheat	Feb 14/16	23,750	38.50
Brazil	Taiwan	Heavy Grain	Feb 1/10	65,000	29.50
Brazil	China	Heavy Grain	Apr 1/10	60,000	47.75
Brazil	China	Heavy Grain	Mar 5/15	60,000	43.00
Brazil	China	Heavy Grain	Mar 1/10	60,000	44.75
Brazil	China	Grain	Mar 1/10	55,000	47.00
River Plate	China	Heavy Grain	Feb 20/25	60,000	45.00
River Plate	Egypt Med	Corn	Feb 25/ Mar 5	30,000	39.25
River Plate	Morocco	Corn	Mar 25/30	25,000	35.00

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

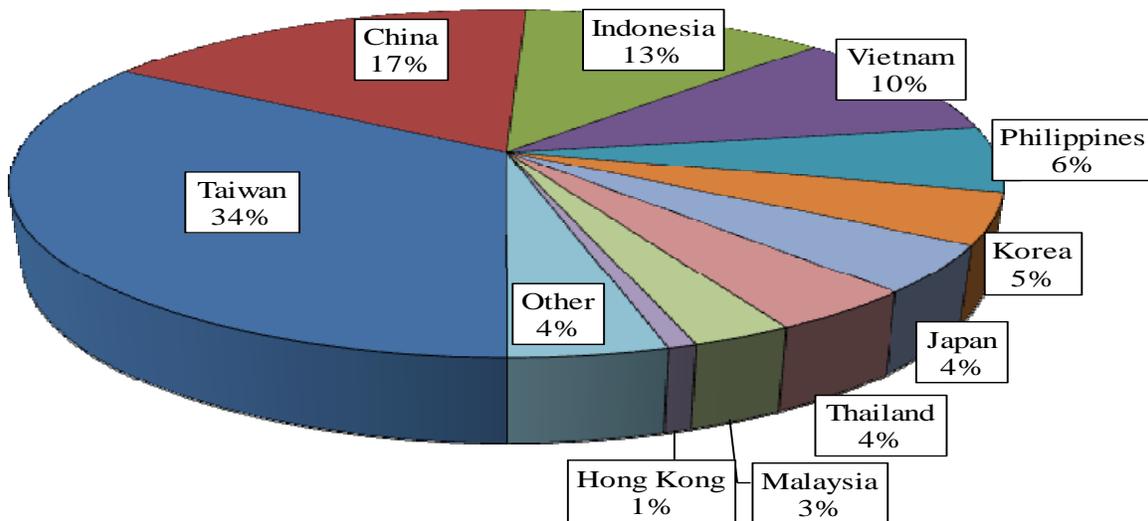
<sup>1</sup>75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2010, containers were used to transport 5 percent of total U.S. waterborne grain exports, and 7 percent of U.S. grain exports to Asia. Asia is the top destination for U.S. containerized grain exports—94 percent in 2010.

Figure 18

**Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2011**

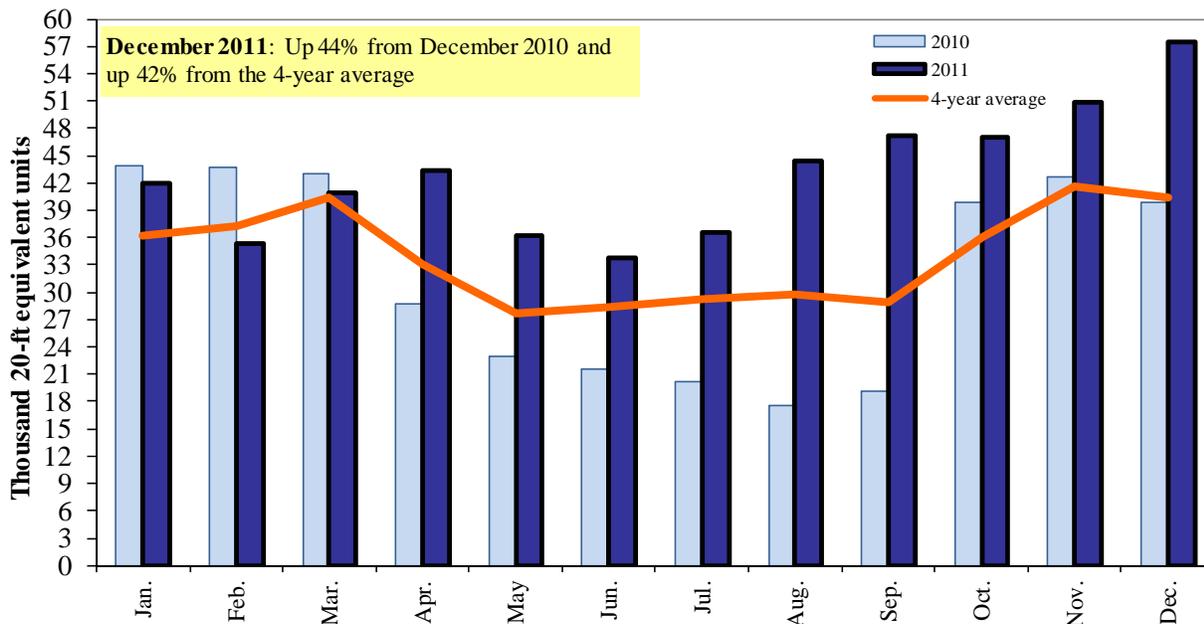


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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