



# Grain Transportation Report

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

Contact Us

April 4, 2013

## WEEKLY HIGHLIGHTS

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### Cold Weather Delays River Opening

Cold weather and persistent ice accumulations have delayed the official start of the Upper Mississippi River Navigation Season. The U.S. Army Corps of Engineers considers the day the first commercial barge tow passes upbound through Mississippi River Lock and Dam 2 (L&D 2, near Hasting, MN) as the start of the Upper Mississippi River Navigation Season. The opening date varies, but the average for the last 10 years has been March 22. The earliest date was March 4 (in 1984, 2000, and 2001) and the latest date was April 7 (1978). Even though L&D 2 is open, Lake Pepin, located south of L&D 2, has had unusually thick late-season ice accumulations, which are preventing navigation. As soon as Lake Pepin becomes navigable, the Upper Mississippi River Season will begin.

### Brazil's Transportation Bottlenecks May Give United States a Short-term Competitive Edge in Soybean Exports

Despite a record production level this year, port congestion is impeding exports of soybeans from Brazil, and may cause Brazil to lose some international markets. The congestion is caused by transportation disruptions due to rain, a lack of storage facilities, a shortage of trucks, and limited waterways and railways. In 2013, Brazil's soybean production increased to a record 82 million metric tons (mmt), up from 65 mmt in 2012. However, according to a survey conducted by the Brazilian government agency National Food Supply Company (CONAB), soybean exports declined from previous years for this time of year due to logistics limitations. Brazil and the United States compete for markets in Asia, Europe, and other regions.

### Total Grain Inspections Above 4-Week Average

For the week ending March 28, the total amount of grain (corn, wheat, and soybeans) inspected for export from all major export regions reached 1.56 million metric tons (mmt), up 6 percent from the past week but 22 percent below last year at this time. Total grain inspections were also 4 percent above the 4-week running average, with corn inspections (.487 mmt) up for the third consecutive week. Wheat inspections (.633 mmt) also rebounded, increasing 17 percent from the past week as shipments to Africa rebounded. Outstanding (unshipped) export sales of wheat were also up slightly. Soybean inspections (.444 mmt) at all major ports dropped 12 percent from the previous week despite a large increase in the Pacific Northwest (PNW). Total PNW grain inspections increased 20 percent from the past week.

### Snapshots by Sector

#### Rail

U.S. railroads originated 17,034 **carloads of grain** during the week ending March 23, down 2 percent from last week, 17 percent from last year, and 24 percent from the 3-year average.

During the week ending March 28, average April non-shuttle **secondary railcar bids/offers per car** were \$5 below tariff, down \$5 from last week, and \$22.50 lower than last year. Average shuttle bids/offers were \$150 below tariff, down \$29 from last week, and \$91 higher than last year.

#### Ocean

During the week ending March 28, 28 **ocean-going grain vessels** were loaded in the Gulf, 18 percent less than the same period last year. Forty-five vessels are expected to be loaded within the next 10 days, 10 percent more than the same period last year.

During the week ending March 28, 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 \$26 per mt, unchanged from the previous week.

#### Barge

During the week ending March 30, **barge grain movements** totaled 361,073 tons, 2.7 percent lower than the previous week and 54.6 percent lower than the same period last year.

During the week ending March 30, 250 grain barges **moved down river**, up 1 percent from last week; 363 grain barges were **unloaded in New Orleans**, down 8.6 percent from the previous week.

#### Fuel

During the week ending April 1, U.S. average **diesel fuel prices** were down 1 cent from the previous week at \$3.99 per gallon—15 cents lower than the same week last year.

# Feature Article/Calendar

## Break-bulk Outlook May Be Influenced by Growth and Events in Developing Regions

In general, break-bulk and ocean shipping have been negatively impacted by many events in recent years, such as a weak global economy, inclement weather, and excess vessel capacity. However, the outlook for the industry could be positively shaped by energy, infrastructure and port improvement projects in developing regions, which could provide a counterbalance in favor of growth.

This article is based on a March 18, article in [Breakbulk Magazine](#)<sup>1</sup> and provides insights on the current state of break-bulk shipping. We summarize some of the main points from that article to provide third-party insight regarding regional developments and the implications for the medium-term outlook in the break-bulk shipping industry. This should not be viewed as an endorsement of these views by USDA, but rather as food for thought for our readers when attempting to understand some of the fundamentals that might affect the shipping of bulk commodities, including grain.

**Outlook:** In recent years, break-bulk and bulk shipping faced weak demand due to global economic conditions and an excess supply of vessels, leading to depressed ocean shipping rates for bulk shipments. Other problems confronted the industry, including piracy, anchorage theft and crimes, and a lack of properly trained and qualified landside staffs in some regions of the world. Nevertheless, growth is springing up in some areas that may boost the demand for break-bulk or bulk shipments in general, and ultimately affect overall ocean freight rates.

Over the next several years, port and infrastructure developments may affect shipments of break-bulk, project cargoes, and other bulk commodities such as iron ore, coal, and grains. This is true especially in the case of Australia, Brazil, China, and India. While Australia is one of the leading exporters of coal and iron ore, Brazil is a leading exporter of soybeans. China is the leading importer of soybeans and iron ore, and India is one of the leading exporters and importers of iron ore, grains and other bulk commodities. Thus, developments in the break-bulk sector may eventually affect the bulk industry in general, especially with multipurpose vessels (MPV) coming into the market. According to Drewry Shipping Consultants, there are currently around 3,108 MPVs, totaling 28.3 million deadweight tons (mdwt). At the end of 2012, 196 additional MPVs were ordered, totaling 2.7 mdwt, representing 10 percent of the current fleet. The demand for MPVs is expected to grow by 8 percent per annum to 2014.

In addition, project and infrastructure developments in some of these regions could create jobs and income growth, which may ultimately raise the demand for agricultural commodities, including grains. Drewry Shipping Consultants expects the demand for all dry cargo to grow 5 percent in each of the next two years.

### Regional Summaries:

**Africa/Southern Africa:** Although much curtailed from previous years, piracy was still the dominant maritime issue across Africa in 2012, especially off the east and west coasts. Various degrees of success in curbing piracy have resulted from a more aggressive and coordinated naval strategy, increased use of onboard armed teams, and implementation of best management practices. Piracy attacks from the Somali groups fell 56 percent, hijackings fell 33 percent, and ransom payment fell by 72 percent. However, the incidents of hijack-for-cargo are likely to continue in Nigeria, where cargo is typically siphoned off to another vessel from a hijacked tanker. This region is also reported to be experiencing issues related to an inadequately trained landside staff, which causes inefficiency and delays.

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<sup>1</sup> This article summarizes “Breakbulk Outlook: Warily Moving Ahead,” by Janet Nodar in *Breakbulk Magazine*, March 18, 2013. Web <<http://www.breakbulk.com/breakbulk-news/general-industry/breakbulk-outlook-warily-moving-ahead/>>

Australia: Australia is a unique market in that the oil and gas, mining, and port developments are all going on at the same time. This will spur planned shipments of equipment, including ship loaders, port infrastructure equipment, and subsea equipment, such as reels. Australia is developing its ports to become more efficient at handling commodities such as iron ore and coal. It also focuses on tasks such as building jetties at liquefied natural gas terminals. However, it appears that none of these projects are expected to ease congestion or turnaround time for break-bulk and project cargo ships.

China: In recent years, China has experienced high growth in both exports and imports and has therefore taken over center stage in the global spotlight for break-bulk and project cargo shipments. China signed the ASEAN-China Free Trade Agreement in 2010, which may encourage more State-owned companies to invest and export out of Southeast Asia. Consequently, this may increase the demand for shipping. However, oversupply of shipping capacity in China may continue due to multipurpose tonnage coming into the market. China is expected to continue to be a buyer's market in 2013. According to the International Monetary Fund, Chinese gross domestic product is projected to grow by 8.2 percent in 2013. However, some analysts believe that policies by the Chinese government may pose a threat to the market.

Brazil: Brazil is not only the fifth-largest country in the world in land mass; it is one of the emerging economies. Brazil is one of the top producers and exporters of soybeans in the world. However, Brazil faces one of the biggest bottlenecks in terms of transportation infrastructure. Fifty-eight percent of all domestic cargo is moved by trucks, but only 6 percent of Brazil's roads are paved. Twenty-eight percent of domestic cargo is moved by rail and 13 percent by water. The infrastructure bottleneck affects ports, airports, roads, railways, and energy. In fact, Brazil's overall infrastructure is ranked 104<sup>th</sup> among 142 countries. Brazil has invested only 2 percent annually of its gross domestic product on infrastructure in the past years, while other countries such as China, India, Chile and Colombia have invested more than 5 percent of their respective GDPs.

India: India is expected to experience growth in both project and break-bulk cargo shipping due to the increased need for power to supply the country's growing industries, as well as its consumers. India is one of the few regions that import and export similar break-bulk cargoes. Although India imports steel from the United States and Europe, it exports steel to the Persian Gulf, Africa, Europe, the United States, and others. India has a large pool of engineering graduates which could fuel growth in the engineering, procurement, and construction (EPC) sectors. Global EPCs are increasingly considering India for engineering and fabrication facilities, which may have a significant impact on India's export of break-bulk cargo. However, India's break-bulk cargo movement still faces some challenges including infrastructure problems in ports, lack of quality roll-on, roll-off facilities, limited use of waterways, congested highways, major ports located within centers of growing cities, and a reputation of compromising safety to reduce costs. The Reserve Bank of India has hinted at rate cuts, which may free capital for infrastructure projects, and ease debt on existing ones. Additionally, the U.S. Export-Import Bank in November approved \$2.1 billion in funding for a new Reliance petrochemical complex in India's west coast.

Other regions: Growth in other regions of the world may also influence break-bulk and project cargo shipments in 2013. Turkey has been growing at an average of 5 to 6 percent in recent years. Several projects such as bridges, expressways, nuclear plants, oil refineries, subway systems, and high-speed trains are either under construction or starting up in Turkey. In addition to Turkey, regions such as the Caspian Sea, Central Asia, and the North Sea are considered growth areas for the break-bulk and project business. [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov)

# Grain Transportation Indicators

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

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
04/03/13	268	234	205	146	219	184
03/27/13	269	232	203	163	219	184

<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)**

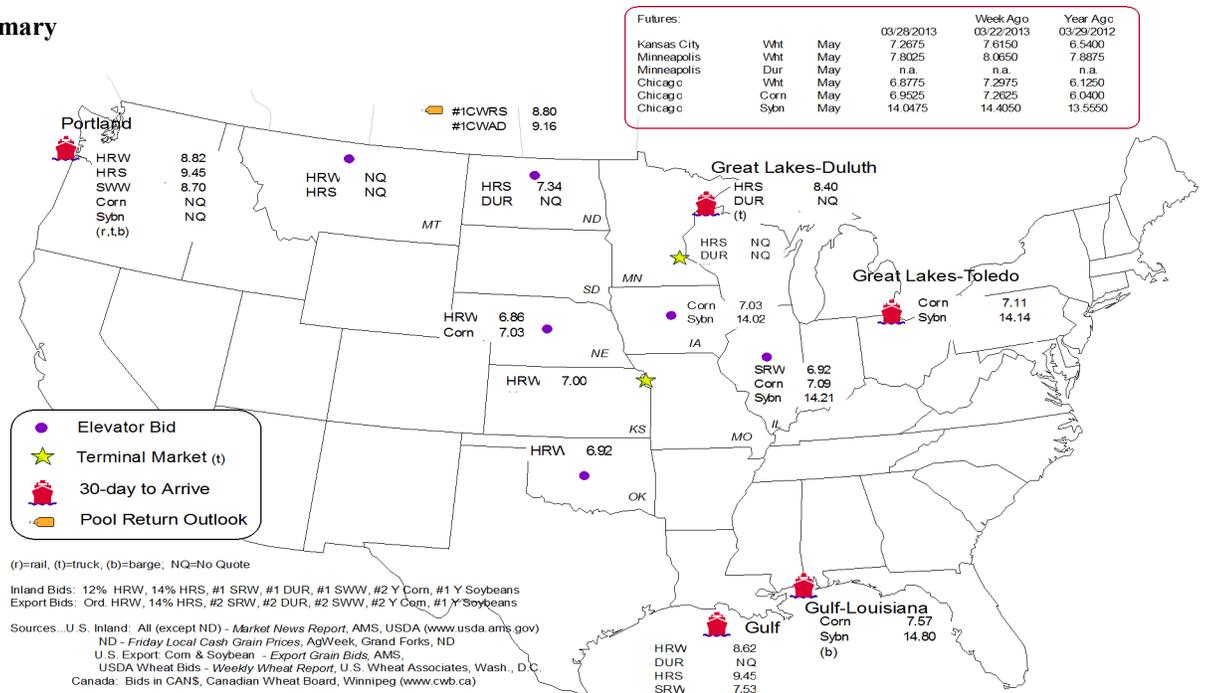
Commodity	Origin--Destination	3/28/2013	3/22/2013
Corn	IL--Gulf	-0.48	-0.47
Corn	NE--Gulf	-0.54	-0.49
Soybean	IA--Gulf	-0.78	-0.77
HRW	KS--Gulf	-1.62	-1.62
HRS	ND--Portland	-2.11	-2.12

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1  
**Grain bid Summary**



# Rail Transportation

Table 3

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

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
03/27/2013 <sup>p</sup>	1	1,017	3,596	149	4,763	03/23/13	1,493
03/20/2013 <sup>r</sup>	148	1,252	3,470	182	5,052	03/16/13	1,011
2013 YTD <sup>r</sup>	7,582	11,129	53,721	7,865	80,297	2013 YTD	14,431
2012 YTD <sup>r</sup>	3,182	9,240	59,953	6,648	79,023	2012 YTD	26,703
2013 YTD as % of 2012 YTD	238	120	90	118	102	% change YTD	54
Last 4 weeks as % of 2012 <sup>2</sup>	26	132	80	54	83	Last 4wks % 2012	51
Last 4 weeks as % of 4-year avg. <sup>2</sup>	8	70	93	41	75	Last 4wks % 4 yr	60
Total 2012	22,604	40,780	199,419	32,524	287,462	Total 2011	97,118
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2010	90,175

<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.

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

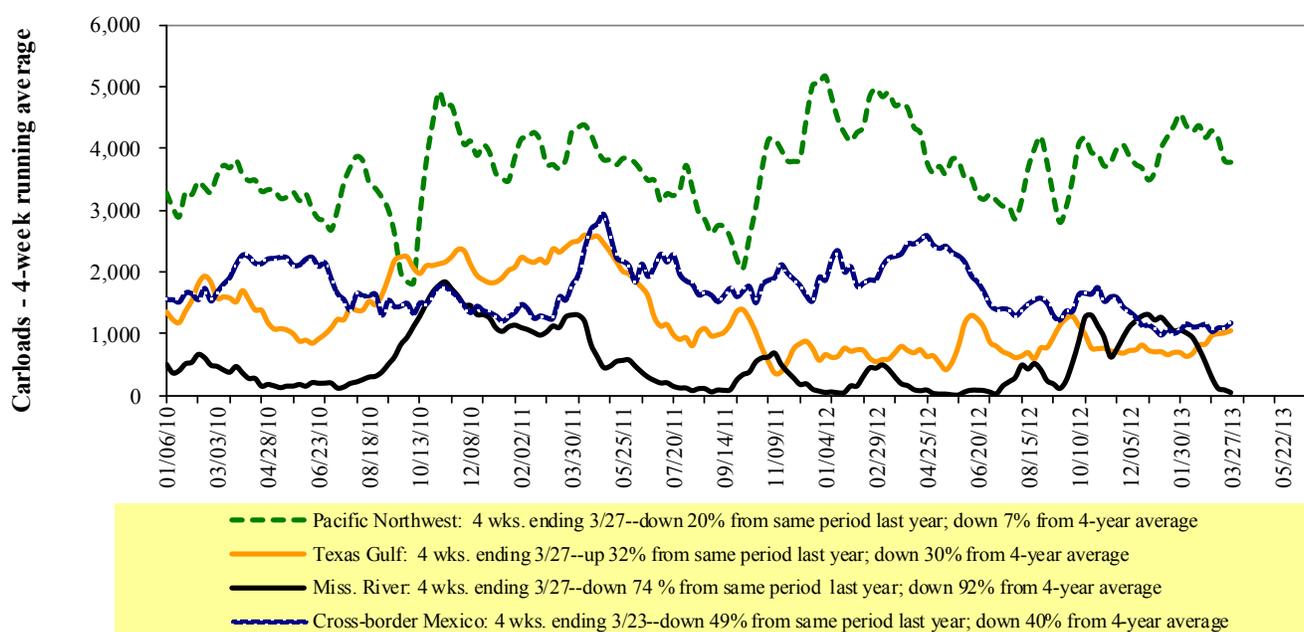
**YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available**

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

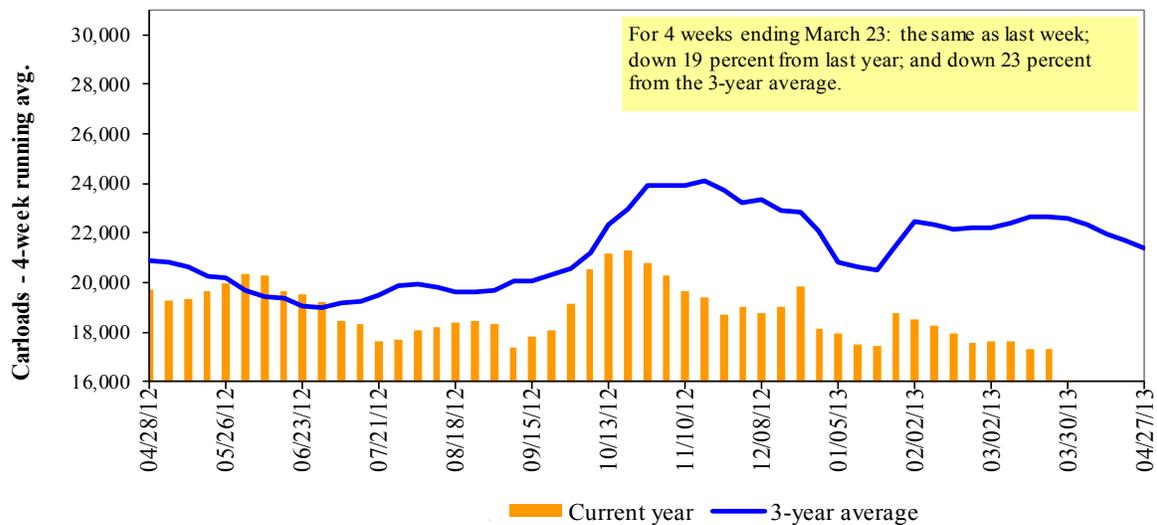
Table 4

**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
03/23/13	1,651	2,280	8,716	449	3,938	17,034	2,893	5,293
This week last year	2,278	2,442	9,419	426	5,983	20,548	3,573	4,864
2013 YTD	18,744	30,790	113,294	5,882	45,809	214,519	41,438	63,155
2012 YTD	26,264	34,981	123,322	5,943	61,756	252,266	45,135	61,240
2013 YTD as % of 2012 YTD	71	88	92	99	74	85	92	103
Last 4 weeks as % of 2012	68	84	86	96	75	81	82	101
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	64	77	84	76	67	76	75	102
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

<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-13	Apr-12	May-13	May-12	Jun-13	Jun-12	Jul-13	Jul-12
BNSF <sup>3</sup>								
COT grain units	0	no bids	0	no offer				
COT grain single-car <sup>5</sup>	0	no bids	0	no bids	no bids	no bids	no bids	no offer
UP <sup>4</sup>								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	1	no bids	no bids	no bids	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.

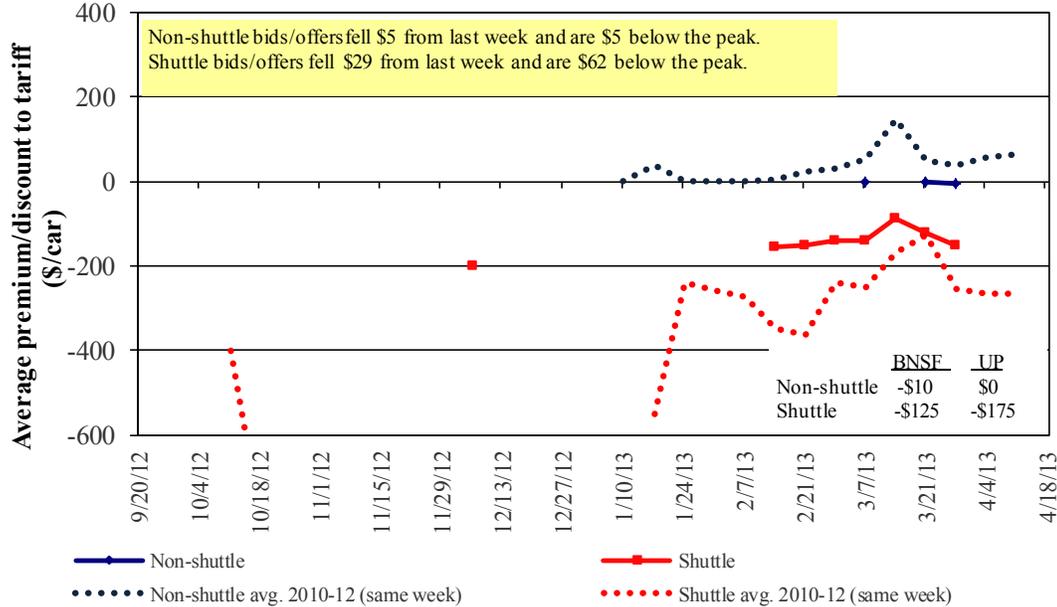
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 2013, Secondary Market**

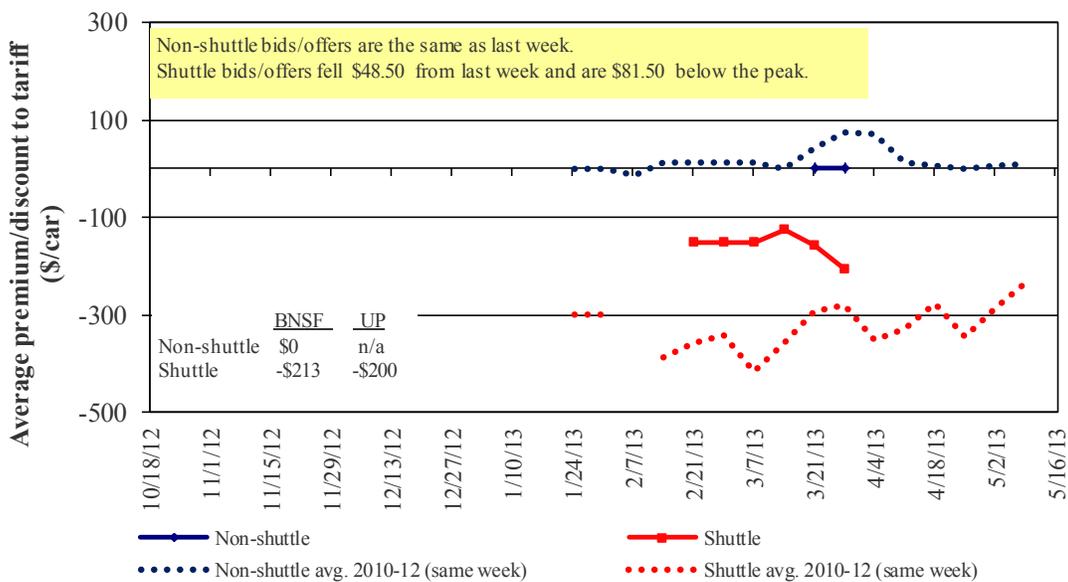


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

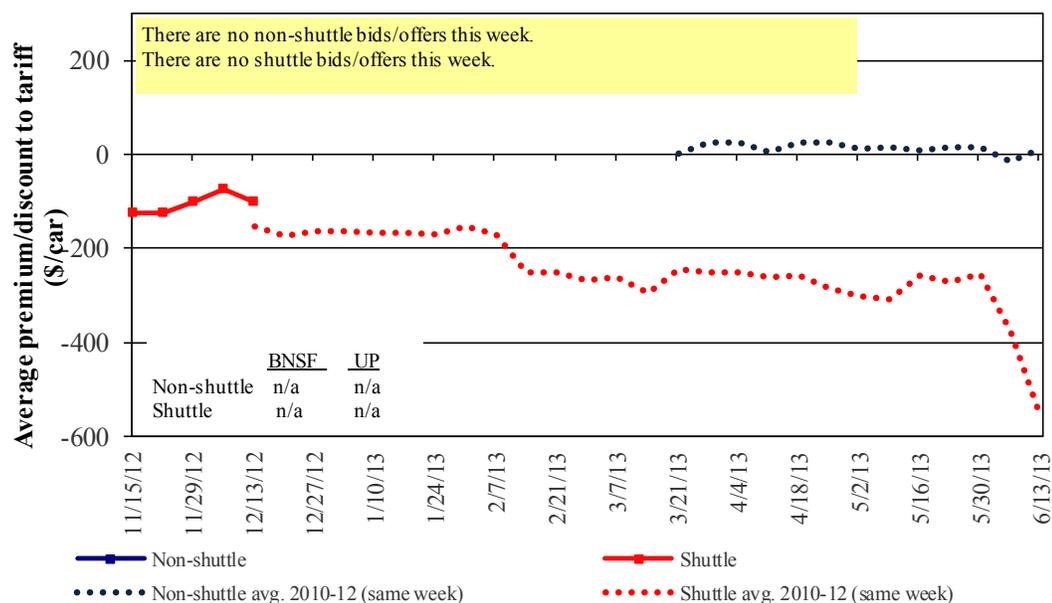


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

### Bids/Offers for Railcars to be Delivered in June 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)<sup>1</sup>

Week ending	Delivery period					
	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13
<b>Non-shuttle</b>						
BNSF-GF	(10)	-	n/a	n/a	n/a	n/a
Change from last week	(10)	-	n/a	n/a	n/a	n/a
Change from same week 2011	(20)	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	n/a
Change from same week 2011	(25)	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(125)	(213)	n/a	n/a	n/a	(38)
Change from last week	(33)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	119	62	n/a	n/a	n/a	137
UP-Pool	(175)	(200)	n/a	n/a	(150)	(125)
Change from last week	(25)	(42)	n/a	n/a	(25)	-
Change from same week 2011	63	175	n/a	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from 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
4/1/2013	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushe <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$207	\$33.28	\$0.91	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$122	\$36.40	\$0.99	9
	Wichita, KS	Los Angeles, CA	\$6,026	\$627	\$66.07	\$1.80	3
	Wichita, KS	New Orleans, LA	\$3,645	\$365	\$39.82	\$1.08	5
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$515	\$60.46	\$1.65	1
	Northwest KS	Galveston-Houston, TX	\$3,912	\$400	\$42.82	\$1.17	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$556	\$46.36	\$1.26	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$412	\$34.98	\$0.95	3
	Toledo, OH	Raleigh, NC	\$4,508	\$459	\$49.32	\$1.34	3
	Des Moines, IA	Davenport, IA	\$2,006	\$87	\$20.79	\$0.57	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$345	\$42.35	\$1.15	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$221	\$35.50	\$0.97	3
	Des Moines, IA	Little Rock, AR	\$3,154	\$257	\$33.87	\$0.92	3
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$747	\$57.72	\$1.57	2
	Minneapolis, MN	New Orleans, LA	\$3,474	\$454	\$39.01	\$1.06	7
	Toledo, OH	Huntsville, AL	\$3,575	\$326	\$38.74	\$1.05	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$462	\$50.05	\$1.36	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$221	\$34.64	\$0.94	-6
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$412	\$39.84	\$1.08	7	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$361	\$39.13	\$1.07	7
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$281	\$38.88	\$1.06	12
	Chicago, IL	Albany, NY	\$3,771	\$430	\$41.72	\$1.14	4
	Grand Forks, ND	Portland, OR	\$5,061	\$623	\$56.45	\$1.54	5
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$649	\$66.84	\$1.82	5
	Northwest KS	Portland, OR	\$4,880	\$656	\$54.97	\$1.50	4
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$759	\$55.20	\$1.50	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$695	\$54.17	\$1.47	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$412	\$33.18	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$405	\$36.89	\$1.00	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$323	\$38.06	\$1.04	3
	Minneapolis, MN	Tacoma, WA	\$4,800	\$753	\$55.14	\$1.50	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$779	\$49.44	\$1.35	2
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$695	\$59.73	\$1.63	6
	Minneapolis, MN	Portland, OR	\$5,330	\$759	\$60.47	\$1.65	7
	Fargo, ND	Tacoma, WA	\$5,230	\$618	\$58.07	\$1.58	7
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$476	\$43.95	\$1.20	7
	Toledo, OH	Huntsville, AL	\$2,750	\$326	\$30.55	\$0.83	3
Grand Island, NE	Portland, OR	\$5,195	\$671	\$58.25	\$1.59	2	

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

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

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

Sources: [www.bnsf.com](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**

Effective date: 4/1/2013

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	\$6,262	\$659	\$70.72	\$1.92	-17
	OK	Cautitlan, EM	\$6,552	\$801	\$75.13	\$2.04	-1
	KS	Guadalajara, JA	\$7,444	\$774	\$83.97	\$2.28	-1
	TX	Salinas Victoria, NL	\$3,553	\$302	\$39.39	\$1.07	-3
Corn	IA	Guadalajara, JA	\$7,699	\$910	\$87.96	\$2.23	0
	SD	Celaya, GJ <sup>5</sup>	\$7,356	\$863	\$83.98	\$2.13	n/a
	NE	Queretaro, QA	\$7,153	\$808	\$81.35	\$2.06	1
	SD	Salinas Victoria, NL	\$5,700	\$656	\$64.94	\$1.65	2
	MO	Tlalhepantla, EM	\$6,592	\$785	\$75.37	\$1.91	5
	SD	Torreon, CU	\$6,522	\$722	\$74.02	\$1.88	1
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$768	\$85.29	\$2.32	7
	NE	Guadalajara, JA	\$8,134	\$878	\$92.08	\$2.50	2
	IA	El Castillo, JA	\$8,555	\$857	\$96.17	\$2.61	4
	KS	Torreon, CU	\$6,651	\$544	\$73.52	\$2.00	2
Sorghum	TX	Guadalajara, JA	\$6,464	\$561	\$71.78	\$1.82	-2
	NE	Celaya, GJ <sup>5</sup>	\$6,997	\$783	\$79.49	\$2.02	n/a
	KS	Queretaro, QA	\$6,815	\$492	\$74.66	\$1.89	5
	NE	Salinas Victoria, NL	\$5,438	\$576	\$61.44	\$1.56	6
	NE	Torreon, CU	\$6,153	\$643	\$69.44	\$1.76	1

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

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

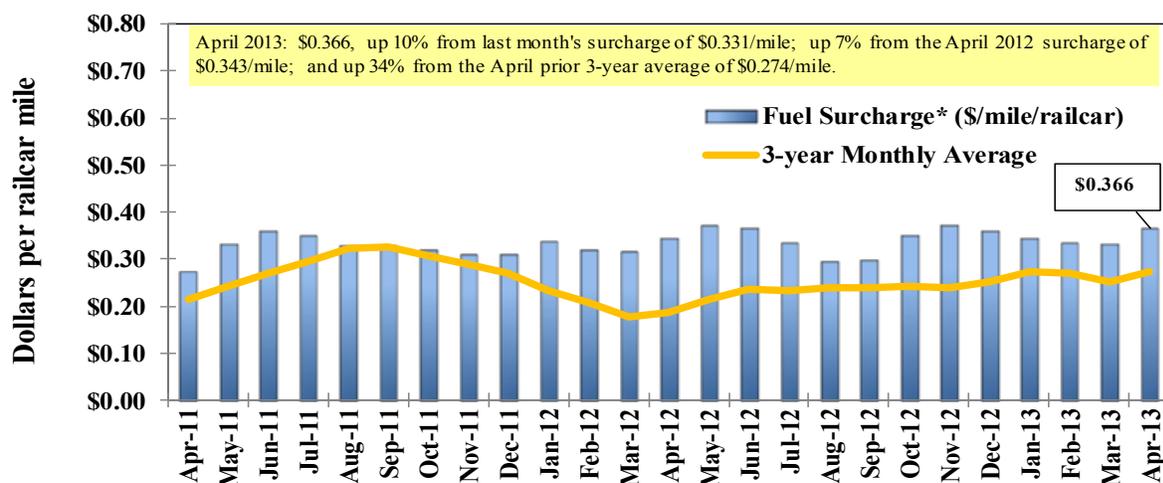
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

<sup>5</sup>Beginning 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 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.

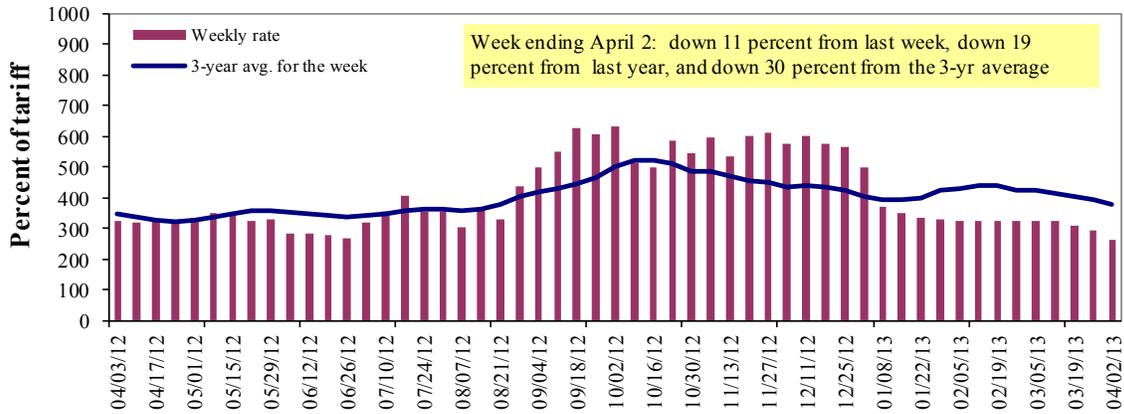
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.esx.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

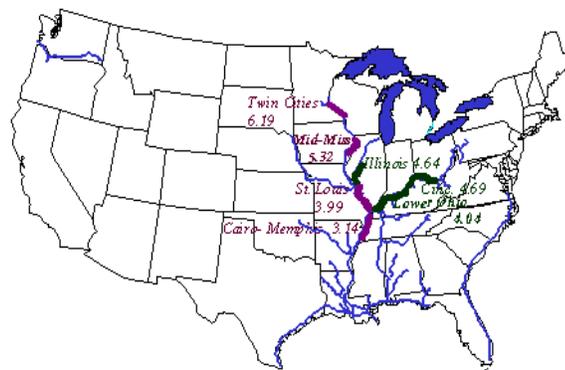
## Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	4/2/2013	-	290	263	233	194	194	180
	3/26/2013	-	298	293	245	205	205	177
<b>\$/ton</b>	4/2/2013	-	15.43	12.20	9.30	9.10	7.84	5.65
	3/26/2013	-	15.85	13.60	9.78	9.61	8.28	5.56
<b>Current week % change from the same week:</b>								
	Last year	-	-21	-19	-2	-32	-32	-15
	3-year avg. <sup>2</sup>	-	-4	-30	-18	-43	-43	-29
<b>Rate<sup>1</sup></b>	May	330	278	263	228	199	199	180
	July	340	295	268	233	204	204	190

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds; - closed for winter or no rates

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9  
Benchmark tariff rates



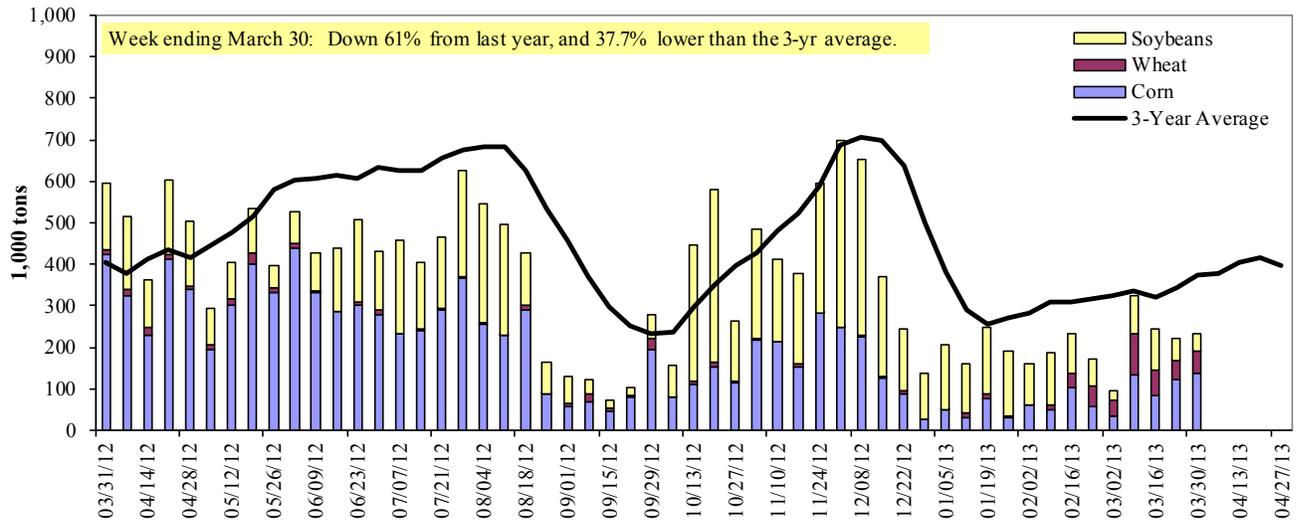
### Calculating barge rate per ton:

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

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 River<sup>1</sup> (Locks 27 - Granite City, IL)**



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

Source: U.S. Army Corps of Engineers

Table 10

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

Week ending 3/30/2013	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	11	2	6	0	19
Winfield, MO (L25)	67	5	25	0	97
Alton, IL (L26)	146	55	37	5	243
Granite City, IL (L27)	139	53	41	0	232
<b>Illinois River (L8)</b>					
	92	33	8	5	138
<b>Ohio River (L52)</b>					
	55	7	12	21	95
<b>Arkansas River (L1)</b>					
	0	25	8	0	34
Weekly total - 2013	194	85	61	21	361
Weekly total - 2012	508	47	235	6	796
2013 YTD <sup>1</sup>	1,559	1,136	2,914	77	5,685
2012 YTD	4,596	413	3,101	92	8,201
2013 as % of 2012 YTD	34	275	94	84	69
Last 4 weeks as % of 2012 <sup>2</sup>	48	45	62	66	69
Total 2012	14,837	1,794	12,663	229	29,523

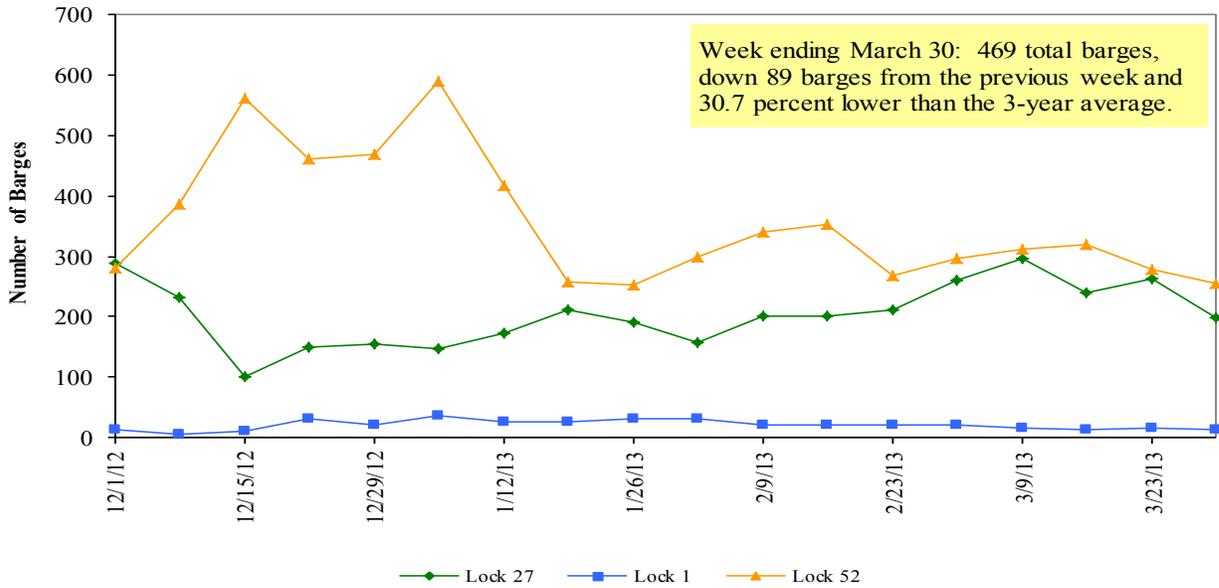
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

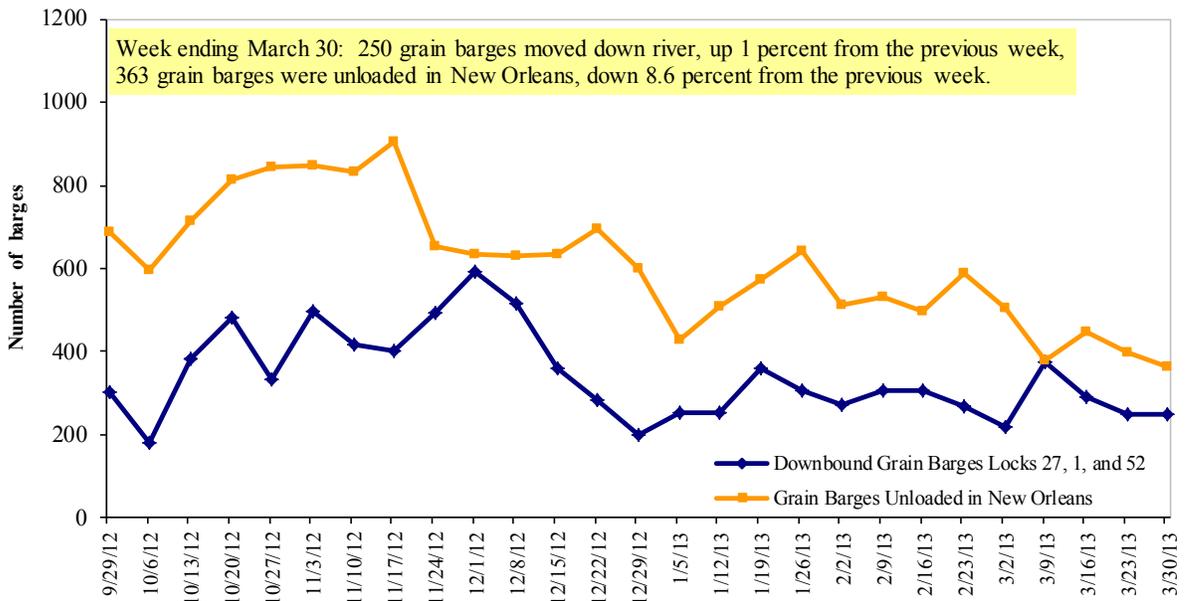
Source: U.S. Army Corps of Engineers

**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 Prices<sup>1</sup>, Week Ending 4/01/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.025	-0.025	-0.165
	New England	4.148	-0.023	-0.114
	Central Atlantic	4.083	-0.026	-0.197
	Lower Atlantic	3.958	-0.025	-0.151
II	Midwest <sup>2</sup>	3.970	-0.009	-0.072
III	Gulf Coast <sup>3</sup>	3.915	-0.020	-0.134
IV	Rocky Mountain	3.922	-0.013	-0.203
V	West Coast	4.116	0.015	-0.304
	West Coast less California	4.016	-0.030	-0.362
	California	4.200	0.053	-0.256
Total	U.S.	3.993	-0.013	-0.149

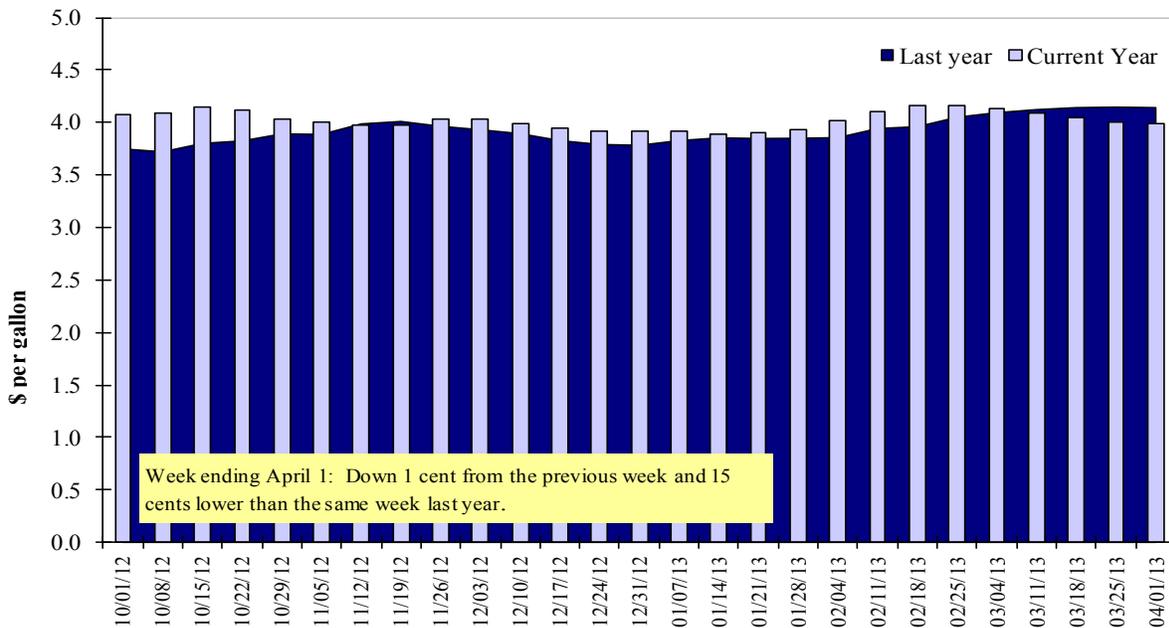
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
3/21/2013	2,034	1,275	1,276	676	113	5,373	4,518	3,203	13,094
This week year ago	1,222	834	1,028	1,337	55	4,475	9,919	5,044	19,438
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2012/13 YTD	7,399	3,675	4,625	3,845	375	19,919	10,648	32,469	63,036
2011/12 YTD	8,003	2,901	5,300	4,348	388	20,939	23,209	26,269	70,417
YTD 2012/13 as % of 2011/12	92	127	87	88	97	95	46	124	90
Last 4 wks as % of same period 2011/12	151	178	118	55	187	120	48	73	71
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

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

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

Table 13

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

Week ending 03/21/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	5,204	9,258	(44)	12,367
Mexico	3,457	8,362	(59)	9,617
China	2,364	3,803	(38)	5,414
Korea	358	3,382	(89)	3,639
Venezuela	486	708	(31)	1,332
<b>Top 5 Importers</b>	<b>11,869</b>	<b>25,512</b>	<b>(53)</b>	<b>32,369</b>
<b>Total US corn export sales</b>	<b>15,167</b>	<b>33,128</b>	<b>(54)</b>	<b>39,180</b>
% of Projected	72%	85%		
Change from prior week	<b>296</b>	<b>131</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	78%	77%		83%
<b>USDA forecast, March 2013</b>	<b>20,960</b>	<b>39,180</b>	<b>(47)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol March 2013</b>	<b>114,300</b>	<b>127,000</b>	<b>(10)</b>	

(n) indicates negative number.

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

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

<sup>3</sup> FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://www.fas.usda.gov/export-sales/myfi_rpt.htm) (Carry-over plus Accumulated Exports)

Table 14

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

Week Ending 03/21/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	21,624	20,620	5	24,602
Mexico	1,981	2,383	(17)	3,180
Japan	1,453	1,461	(1)	1,891
Indonesia	1,217	1,080	13	1,741
Egypt	649	772	(16)	1,292
<b>Top 5 importers</b>	<b>26,924</b>	<b>26,317</b>	<b>2</b>	<b>32,706</b>
<b>Total US soybean export sales</b>	<b>35,672</b>	<b>31,313</b>	<b>14</b>	<b>37,060</b>
% of Projected	97%	84%		
Change from prior week	66	472		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>75%</b>	<b>84%</b>		
<b>USDA forecast, March 2013</b>	<b>36,610</b>	<b>37,060</b>	<b>(1)</b>	

(n) indicates negative number.

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

Table 15

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

Week Ending 03/21/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,463	3,453	0.3	3,512
Mexico	2,671	3,301	(19)	3,496
Nigeria	2,762	2,991	(8)	3,248
Philippines	1,819	1,976	(8)	2,039
Korea	1,372	1,900	(28)	1,983
Egypt	1,368	564	142	950
Taiwan	988	828	19	888
Indonesia	435	736	(41)	830
Venezuela	598	601	(0)	594
Iraq	209	572	(63)	572
<b>Top 10 importers</b>	<b>15,685</b>	<b>16,922</b>	<b>(7)</b>	<b>18,111</b>
<b>Total US wheat export sales</b>	<b>25,292</b>	<b>25,413</b>	<b>(0.5)</b>	<b>28,560</b>
% of Projected	91%	89%		
Change from prior week	580	226		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>62%</b>	<b>67%</b>		<b>63%</b>
<b>USDA forecast, March 2013</b>	<b>27,900</b>	<b>28,560</b>	<b>(2)</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/><sup>3</sup>FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://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 03/28/13	Previous Week <sup>1</sup>	Current Week as % of Previous	2013 YTD <sup>1</sup>	2012 YTD <sup>1</sup>	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2012
							2012	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	162	325	50	3,096	3,249	95	80	95	12,625
Corn	109	86	126	1,105	1,549	71	72	64	5,512
Soybeans	303	66	459	3,361	3,296	102	75	76	10,347
<b>Total</b>	<b>575</b>	<b>477</b>	<b>120</b>	<b>7,562</b>	<b>8,094</b>	<b>93</b>	<b>76</b>	<b>80</b>	<b>28,484</b>
<b>Mississippi Gulf</b>									
Wheat	271	152	178	2,286	1,442	159	160	196	5,462
Corn	307	297	103	2,648	5,834	45	66	46	18,068
Soybeans	42	314	14	6,231	6,931	90	42	38	24,684
<b>Total</b>	<b>620</b>	<b>763</b>	<b>81</b>	<b>11,164</b>	<b>14,207</b>	<b>79</b>	<b>73</b>	<b>61</b>	<b>48,215</b>
<b>Texas Gulf</b>									
Wheat	172	50	348	1,434	1,243	115	109	59	5,912
Corn	0	2	8	43	172	25	33	22	336
Soybeans	0	0	n/a	122	0	n/a	n/a	0	626
<b>Total</b>	<b>172</b>	<b>52</b>	<b>332</b>	<b>1,599</b>	<b>1,415</b>	<b>113</b>	<b>94</b>	<b>51</b>	<b>6,874</b>
<b>Interior</b>									
Wheat	11	13	84	230	286	80	183	51	1,218
Corn	70	52	133	634	2,243	28	114	34	6,115
Soybeans	92	98	93	1,169	1,131	103	57	94	4,204
<b>Total</b>	<b>172</b>	<b>163</b>	<b>105</b>	<b>2,032</b>	<b>3,660</b>	<b>56</b>	<b>46</b>	<b>54</b>	<b>11,538</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	8	9	92	66	98	481
Corn	0	0	n/a	0	14	0	n/a	0	56
Soybeans	0	0	n/a	4	2	199	100	300	713
<b>Total</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>12</b>	<b>25</b>	<b>47</b>	<b>70</b>	<b>109</b>	<b>1,250</b>
<b>Atlantic</b>									
Wheat	17	0	n/a	296	2	n/a	n/a	660	341
Corn	0	0	n/a	2	50	4	0	0	143
Soybeans	7	24	30	611	396	154	60	72	1,460
<b>Total</b>	<b>24</b>	<b>24</b>	<b>100</b>	<b>909</b>	<b>447</b>	<b>203</b>	<b>183</b>	<b>167</b>	<b>1,944</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	633	539	117	7,350	6,230	118	114	108	26,040
Corn	487	438	111	4,431	9,861	45	57	46	30,230
Soybeans	444	503	88	11,498	11,756	98	62	57	42,035
<b>Total</b>	<b>1,564</b>	<b>1,480</b>	<b>106</b>	<b>23,278</b>	<b>27,847</b>	<b>84</b>	<b>75</b>	<b>66</b>	<b>98,305</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

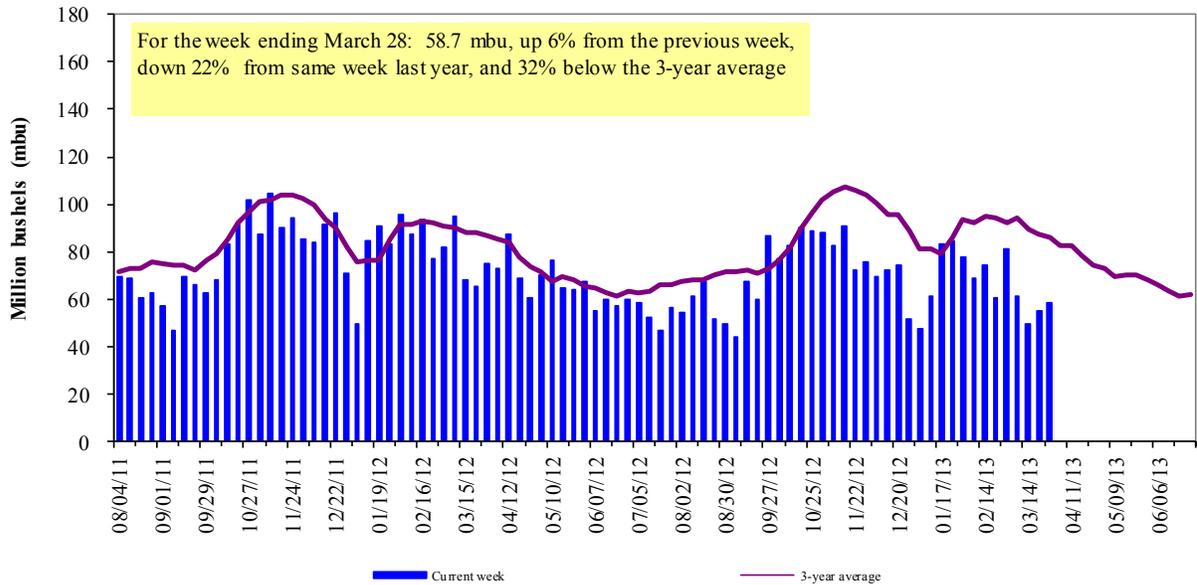
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The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

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Figure 14

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

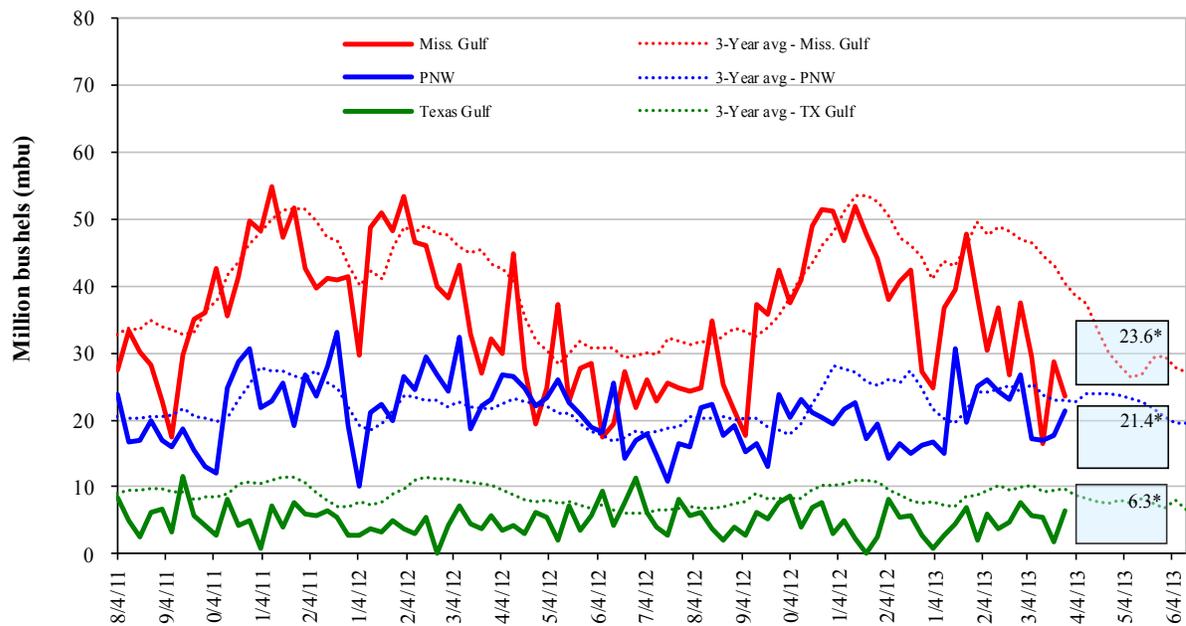


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

<b>March 28 % change from:</b>	<b>MS Gulf</b>	<b>TX Gulf</b>	<b>U.S. Gulf</b>	<b>PNW</b>
Last week	down 18	up 231	down 3	up 21
Last year (same week)	down 27	up 11	down 21	down 7
3-yr avg. (4-wk mov. avg)	down 42	down 35	down 41	down 8

# Ocean Transportation

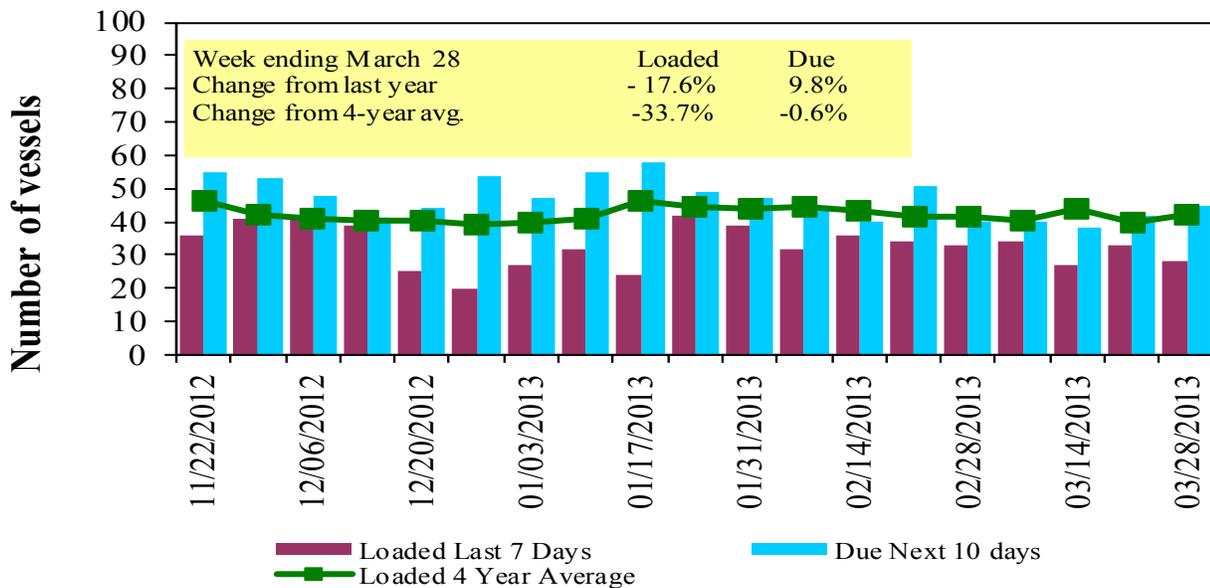
Table 17

**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
3/28/2013	18	28	45	10	n/a
3/21/2013	23	33	42	9	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

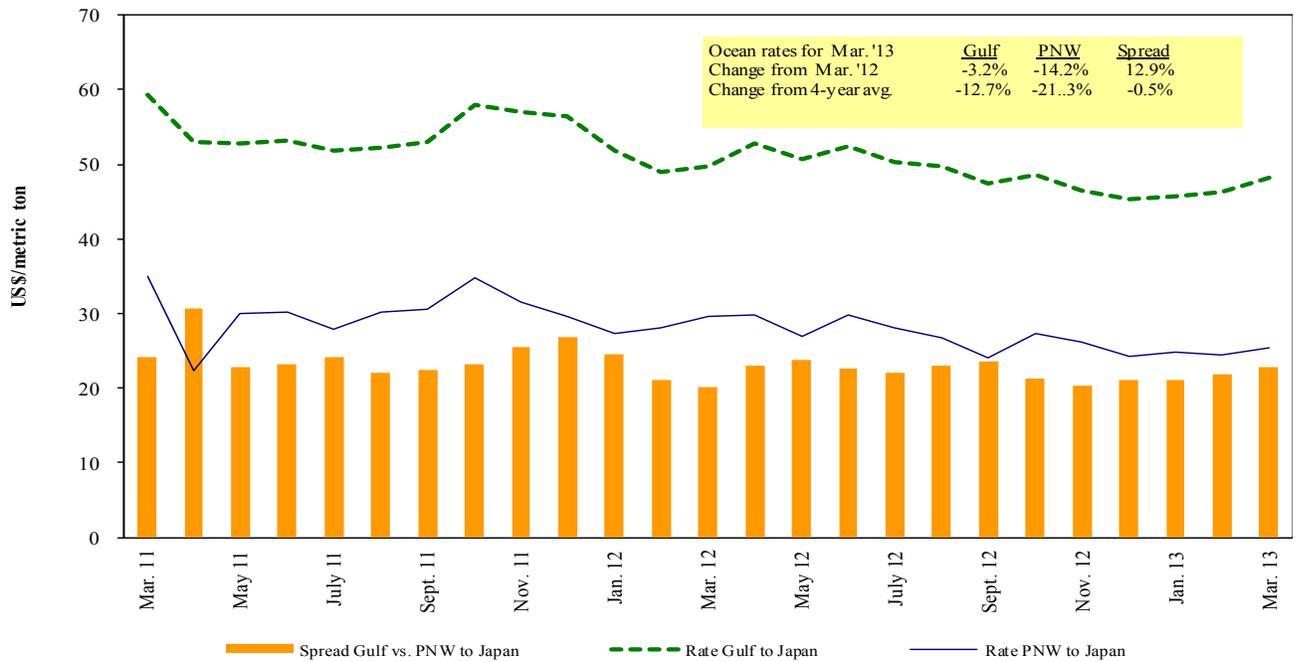
**Figure 16**  
**U.S. Gulf<sup>d</sup> Vessel Loading Activity**



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 03/30/2013**

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 25/Feb5	55,000	43.05
U.S. Gulf	China	Heavy Grain	Feb 1/5	54,000	20.50
U.S. Gulf	Egypt Med	Heavy Grain	Feb 20/Mar 5	60,000	23.25
U.S. Gulf	Ethiopia <sup>1</sup>	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	Apr 10/15	60,000	43.00
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	Mar 20/30	30,000	19.75
France	Algeria	Wheat	Feb 20/25	30,000	18.50
River Plate	Egypt Med	Heavy Grain	Apr 8/12	60,000	32.00

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

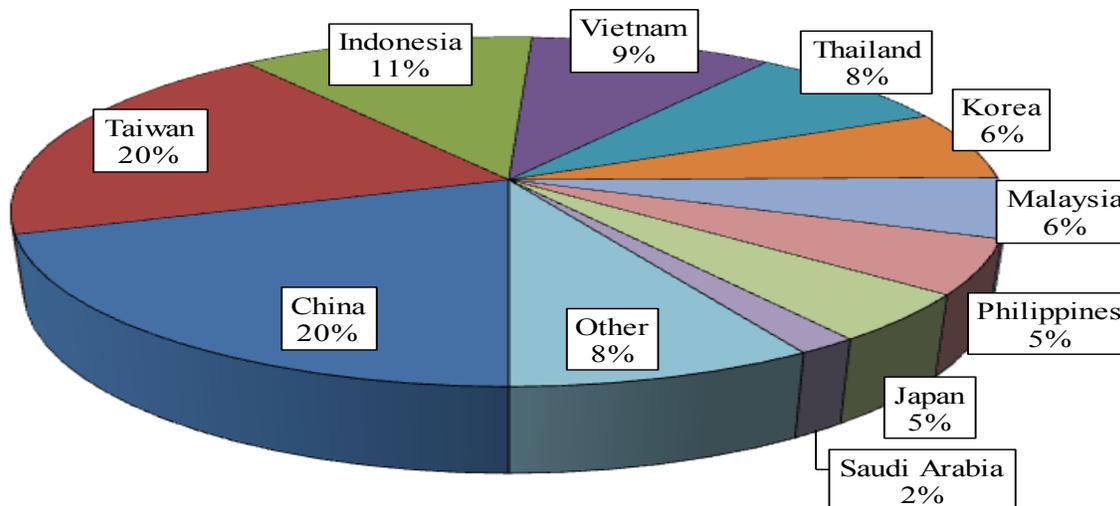
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2012, containers were used to transport 8 percent of total U.S. waterborne grain exports, up 1 percentage point from 2011. Approximately 66 percent of U.S. waterborne grain exports in 2012 went to Asia, of which 11 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—96 percent in 2012.

Figure 18

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

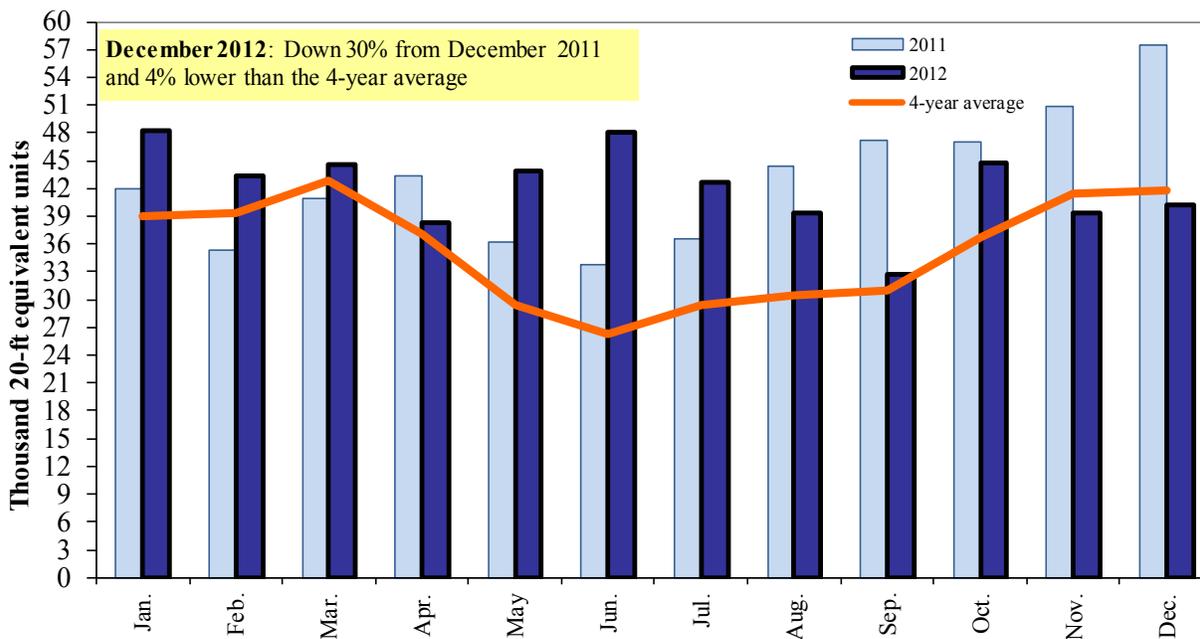


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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