



WEEKLY HIGHLIGHTS

June 9, 2011

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The next
release is
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[CSX Invests Additional \\$160 million on National Gateway](#)

CSX announced it will invest an additional \$160 million over the next few years in its National Gateway project to renovate the Virginia Avenue Tunnel in Washington D.C. and provide double-stack train clearance in Maryland, West Virginia, and the District of Columbia. The National Gateway project will provide shippers with access to double-stack trains between Ohio and the Ports of Baltimore, Virginia, and Wilmington, N.C. CSX's Gateway project will compete with Norfolk Southern's Heartland Corridor, which provides double-stack trains between Chicago, Columbus, OH, and Norfolk, VA. Both companies are improving capacity in anticipation of significantly increased traffic from eastern ports after the Panama Canal expansion is completed in 2015.

[Total Grain Inspections Lowest Since June 2010](#)

For the week ending June 2, total inspections of grain (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.44 million metric tons (mmt), down 17.4 percent from the previous week but 4.3 percent above this week last year. Grain inspections were the lowest since June 24, 2010. Inspections also dropped for each of the three major grains and for each of the major export regions. Shipments of grain, mainly wheat, were down 79 percent to Africa and 66 percent to Middle Eastern countries. Total soybean inspections dropped 77 percent as shipments to Asia slipped. Despite the decrease in overall grain inspections, the amount inspected during the last four weeks were 13 percent higher than this time last year and 15 percent above the 3-year average.

[Export Sales and Unshipped Balances Could Boost Transportation Demand](#)

According to USDA press release on June 7, private exporters reported sales of 822,960 metric tons (mt) of corn to Mexico. About 548,640 mt of the total are scheduled for delivery during the 2011/2012 marketing year; 274,320 mt are due for delivery during the 2012/2013 marketing year. Meanwhile, unshipped export balances of all grain at 17.2 mmt are 26 percent higher than the same period a year ago. Increasing export sales and high unshipped export balances could boost transportation demand in near and future terms.

[Missouri River Flooding Disrupts Rail Transportation](#)

After recent record rains in the Upper Plains, the U.S. Army Corps of Engineers is increasing releases from the six dams on the Missouri River to maintain dam safety. These record water releases combined with already high water levels are creating significant flood conditions along the Missouri River. A section of the Canadian National (CN) railroad from Council Bluffs, IA, to Omaha, NE, is currently closed. In addition, CN has no access to its yards in Council Bluffs and Omaha, and is unable to service local customers until clearance is provided by authorities. BNSF reports that its Omaha subdivision is out of service as a result of flood levees constructed over the track. The historic water flows could impact St. Louis, MO, barge operations on the Mississippi River for the next several weeks by slightly delaying some movements due to restrictions such as daylight only operating requirements and reduced numbers of barges that can be towed.

Snapshots by Sector

Rail

U.S. railroads originated 23,300 **carloads of grain** during the week ending May 28, up 2 percent from last week, up 18 percent from last year, and 20 percent higher than the 3-year average.

During the week ending June 2, average June **non-shuttle secondary railcar bids/offers** were \$23 above tariff, down \$8.50 from last week. Average shuttle rates were \$129 below tariff, up \$153.50 from last week.

Ocean

During the week ending June 2, 31 **ocean-going grain vessels** were loaded in the Gulf, down 6 percent from last year. Forty-two vessels are expected to be loaded within the next 10 days, 27 percent more than the same period last year.

During the week ending June 3, ocean freight rate for shipping bulk grain from the Gulf to Japan was \$53 per metric ton (mt), 1 percent lower than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$30 per mt—3 percent lower than the previous week.

Barge

During the week ending June 4, **barge grain movements** totaled 543,199 tons, 20.4 percent lower than the previous week and 31 percent lower than the same period last year.

During the week ending June 4, 346 grain barges **moved down river**, down 22% from last week; 319 grain barges were **unloaded in New Orleans**, down 13% from the previous week.

Fuel

During the week ending June 6, U.S. average **diesel fuel prices** decreased 1 cent per gallon to \$3.94—down 0.2 percent from the previous week but 34 percent higher than the same week last year.

Feature Article/Calendar

First Quarter Soybean Transportation Costs: U.S. Landed Costs Generally Lower than Brazil's

During the first quarter, the U.S. soybean shippers continued to enjoy a competitive advantage to those of Brazil because U.S. transportation costs were lower than Brazil's. The U.S. total landed costs of soybeans in China were also generally lower than Brazil's. The total transportation costs for shipping soybeans from the U.S. Gulf to Hamburg, Germany, and Shanghai, China, increased during the first quarter (see tables 1 and 2). The cost of shipping soybeans from Fargo, ND in the Pacific Northwest to Shanghai remained relatively unchanged during the quarter. The transportation cost of shipping soybeans from Minneapolis, MN, and Davenport, IA, to Hamburg increased 20 and 25 percent, respectively, from the previous quarter. The costs of shipping from the same locations to Shanghai increased 14 and 17 percent during the quarter. However, the cost of shipping from Fargo, ND, to Shanghai was almost unchanged and the cost from Sioux Falls, SD, to Shanghai increased 4 percent. Transportation cost for shipping soybeans from North Mato Grosso (MT) to Hamburg increased by 5 percent and the cost of shipping from South Goiás decreased by 2 percent during the quarter. The cost of shipping from the same two

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2010	2010	2011	Percent change		2010	2010	2011	Percent change	
	1 st qtr.	4 th qtr.	1 st qtr.	Yr. to Yr.	Qtr. to Qtr.	1 st qtr.	4 th qtr.	1 st qtr.	Yr. to Yr.	Qtr. to Qtr.
United States (via U.S. Gulf)										
	Minneapolis, MN					Davenport, IA				
	--\$/mt--					--\$/mt--				
Truck	10.46	8.94	11.34	8.41	26.85	10.46	8.94	11.34	8.41	26.85
Barge	10.86	41.82	21.38	96.87	-48.88	10.86	31.85	21.38	96.87	-32.87
Ocean ¹	24.92	24.84	23.13	-7.18	-6.88	24.92	24.84	23.13	-7.18	-6.88
Rail	34.74	-	34.67	-0.20	-	23.84	-	26.44	10.91	-
Total transportation ²	80.98	75.60	90.52	11.78	19.74	70.08	65.63	82.29	17.42	25.38
Farm Value ³	340.98	385.69	438.47	28.59	13.68	346.00	399.16	449.50	29.91	12.61
Landed Cost	421.96	461.29	528.99	25.36	14.68	416.08	464.79	531.79	27.81	14.42
Transport % of landed cost	19.19	16.39	17.11			16.84	14.12	15.47		
Brazil										
	North MT⁴ - Santos⁵					South GO⁴ - Paranagua⁵				
	--\$/mt--					--\$/mt--				
Truck	113.10	120.12	124.57	10.14	3.70	61.86	64.38	61.96	0.16	-3.76
Ocean ⁶	32.25	31.67	34.96	8.40	10.39	31.83	33.50	33.86	6.38	1.07
Total transportation ²	145.35	151.79	159.53	9.76	5.10	93.69	97.88	95.82	2.27	-2.10
Farm Value ⁷	261.05	413.46	406.96	55.89	-1.57	309.89	400.62	441.07	42.33	10.10
Landed Cost	406.40	565.25	566.49	39.39	0.22	403.58	498.50	536.89	33.03	7.70
Transport % of landed cost	35.77	26.85	28.16			23.21	19.63	17.85		

¹Source: O'Neil Commodity Consulting

³Source: USDA/NASS

⁴Producing regions: MT= Mato Grosso, GO = Goiás

⁵Export ports

⁶Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

⁷Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Brazil origins to Shanghai decreased by 2 and 6 percent, respectively, compared to the previous quarter. In areas where the Upper Mississippi River is closed during winter, including Minneapolis and Davenport, transportation costs increased partly as a result of the addition of a rail component to the land portion of the shipment. There was also an increase in trucking rates for the entire region. During the quarter, some soybean shipments were transported by rail to St. Louis, MO, and then loaded on barges for transport to New Orleans. Barge rates decreased because soybeans bound for New Orleans were loaded onto barges in St. Louis instead of Minneapolis. Ocean freight rates from the Gulf to export destinations also declined during the quarter. However, an increase in export activity in the Pacific Northwest slightly pushed up the ocean freight rates from that region (see [GTR, date 06/02/11](#)). With the exception of shipments from North MT to Hamburg, Brazil's transportation costs declined during the quarter due to a reduction in truck and/or ocean freight rates, but remained higher than U.S. transportation costs. Despite the increase in U.S transportation costs, its landed costs were generally lower than

Brazil's. U.S. transportation costs also typically represented a smaller proportion of the landed costs. U.S. landed costs to Hamburg were \$528.99 and \$531.79; the transportation shares were 17 and 15 percent, respectively (see table 1). Brazilian landed costs to Hamburg were \$566.49 and \$536.89; the transportation shares were 28 and 18 percent. The landed costs of U.S. soybean shipments to Shanghai ranged from \$525.57 to \$562.45, while the transportation shares of the cost ranged from 17 to 22 percent (see table 2). On the other hand, Brazilian landed costs to Shanghai ranged from \$559.28 to \$581.53, and the transportation shares ranged from 21 to 30 percent.

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2010	2010	2011	Percent change		2010	2010	2011	Percent change	
	1 st qtr.	4 th qtr.	1 st qtr.	Yr. to Yr.	Qtr. to Qtr.	1 st qtr.	4 th qtr.	1 st qtr.	Yr. to Yr.	Qtr. to Qtr.
United States (via U.S. Gulf)										
Minneapolis, MN					Davenport, IA					
	--\$/mt--					--\$/mt--				
Truck	10.46	8.94	11.34	8.41	26.85	10.46	8.94	11.34	8.41	26.85
Barge	10.86	41.82	21.38	96.87	-48.88	10.86	31.85	21.38	96.87	-32.87
Ocean ¹	65.54	55.46	53.79	-17.93	-3.01	65.54	55.46	53.79	-17.93	-3.01
Rail	34.74	-	34.67	-0.20	-	23.84	-	26.44	10.91	-
Total transportation ²	121.60	106.22	121.18	-0.35	14.08	110.70	96.25	112.95	2.03	17.35
Farm Value ³	346.86	385.69	438.47	26.41	13.68	351.51	399.16	449.50	27.88	12.61
Landed Cost	468.46	491.91	559.65	19.47	13.77	462.21	495.41	562.45	21.69	13.53
Transport % of landed cost	25.96	21.59	21.65			23.95	19.43	20.08		
Via PNW										
Fargo, ND					Sioux Falls, SD					
Truck	10.46	8.94	11.34	8.41	26.85	10.46	8.94	11.34	8.41	26.85
Ocean ¹	38.64	29.25	30.92	-19.98	5.71	38.64	29.25	30.92	-19.98	5.71
Rail	48.11	48.99	44.84	-6.80	-8.47	48.47	50.31	49.69	2.52	-1.23
Total transportation ²	97.21	87.18	87.10	-10.40	-0.09	97.57	88.50	91.95	-5.76	3.90
Farm Value ³	337.43	381.28	438.47	29.94	15.00	336.45	385.56	448.27	33.24	16.26
Landed Cost	434.64	468.46	525.57	20.92	12.19	434.02	474.06	540.22	24.47	13.96
Transport % of landed cost	22.37	18.61	16.57			22.48	18.67	17.02		
Brazil										
North MT⁴ - Santos⁵					South GO⁴ - Paranagua⁵					
	--\$/mt--					--\$/mt--				
Truck	113.10	120.12	124.57	10.14	3.70	61.86	64.38	61.96	0.16	-3.76
Ocean ⁶	52.33	57.79	50.00	-4.45	-13.48	52.50	61.50	56.25	7.14	-8.54
Total transportation ²	165.43	177.91	174.57	5.52	-1.88	114.36	125.88	118.21	3.37	-6.09
Farm Value ⁷	261.05	413.46	406.96	55.89	-1.57	309.89	400.62	441.07	42.33	10.10
Landed Cost	426.48	591.37	581.53	36.36	-1.66	424.25	526.50	559.28	31.83	6.23
Transport % of landed cost	38.79	30.08	30.02			26.96	23.91	21.14		

¹Source: O'Neil Commodity Consulting

³Source: USDA/NASS

⁴Producing regions: MT= Mato Grosso, GO = Goiás

⁵Export ports

⁶Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS

⁷Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Market Outlook: The United States exported about 7.93 million metric tons of soybeans to China during the 1st quarter of 2011—3 percent more than during the same period a year ago. However, the value of the exports increased by 37 percent to about \$4.26 billion due to robust farm prices received by the U.S. farmers compared to a year earlier. Despite the robust farm prices, U.S. landed costs were still relatively low and the transportation shares of the landed cost were moderate. Lower transportation costs keep U.S. exports competitive.

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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail ²	Barge	Ocean	
				Gulf	Pacific
06/08/11	264	145	248	237	213
06/01/11	265	127	257	239	220

¹Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = nearby secondary rail market (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

²The rail indicator is not an index. It is the difference between the nearby secondary rail market bid for this week and the average bid for year 2000 (+) 100.
Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)

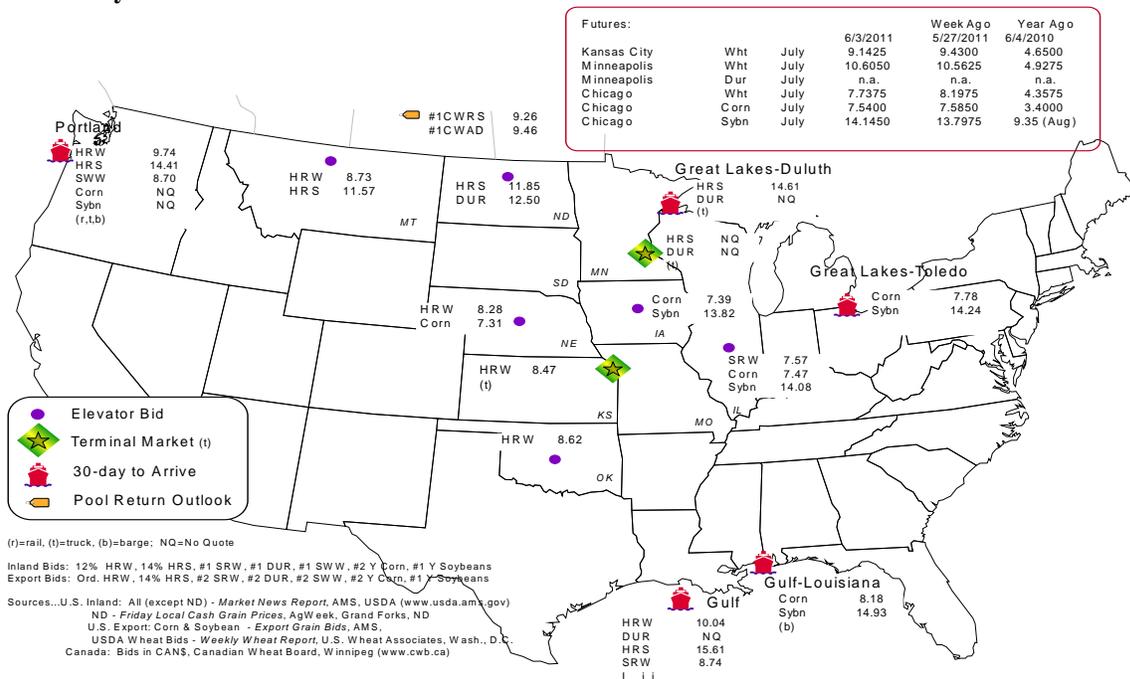
Commodity	Origin--Destination	6/3/2011	5/27/2011
Corn	IL--Gulf	-0.71	-0.70
Corn	NE--Gulf	-0.87	-0.86
Soybean	IA--Gulf	-1.11	-1.09
HRW	KS--Gulf	-1.57	-1.52
HRS	ND--Portland	-2.56	-2.70

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		Cross-Border	Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	East Gulf	
6/01/2011 ^p	435	2,323	1,427	3,225	169	7,579
5/25/2011 ^r	554	1,854	1,338	4,341	602	8,689
2011 YTD	20,052	49,853	20,164	86,573	14,409	191,051
2010 YTD	7,528	30,115	20,346	73,982	16,934	148,905
2011 YTD as % of 2010 YTD	266	166	99	117	85	128
Last 4 weeks as % of 2010 ²	322	224	133	122	196	150
Last 4 weeks as % of 4-year avg. ²	144	186	134	105	155	128
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2010 and prior 4-year average.

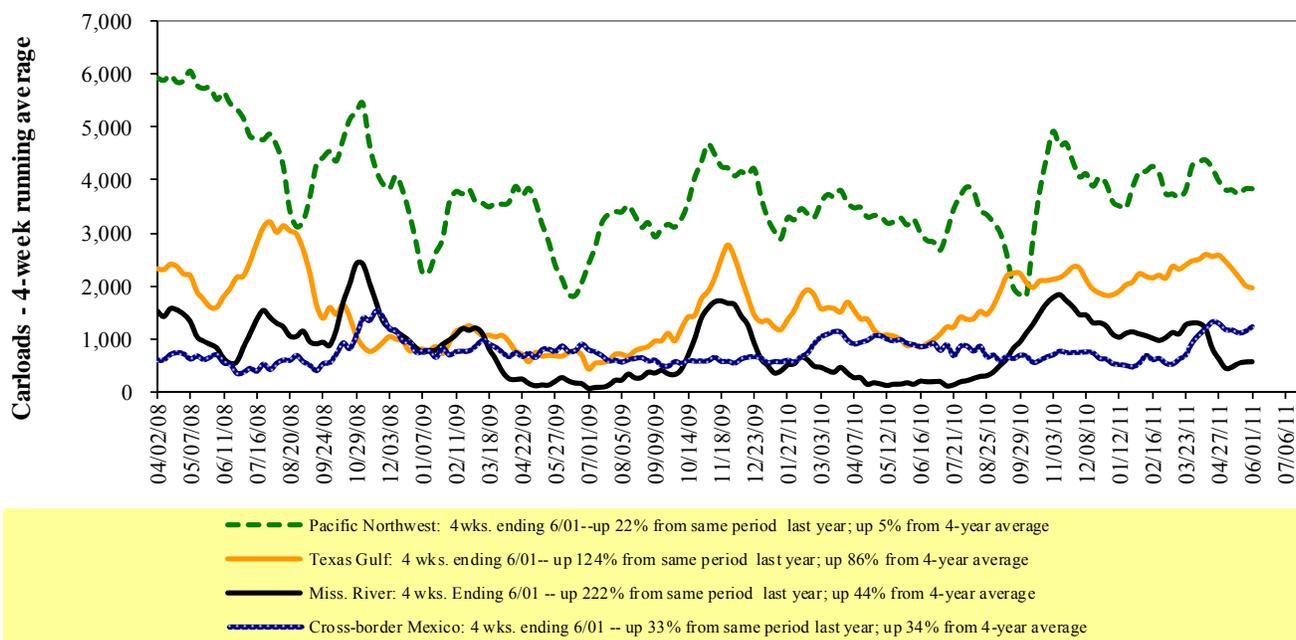
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 35 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

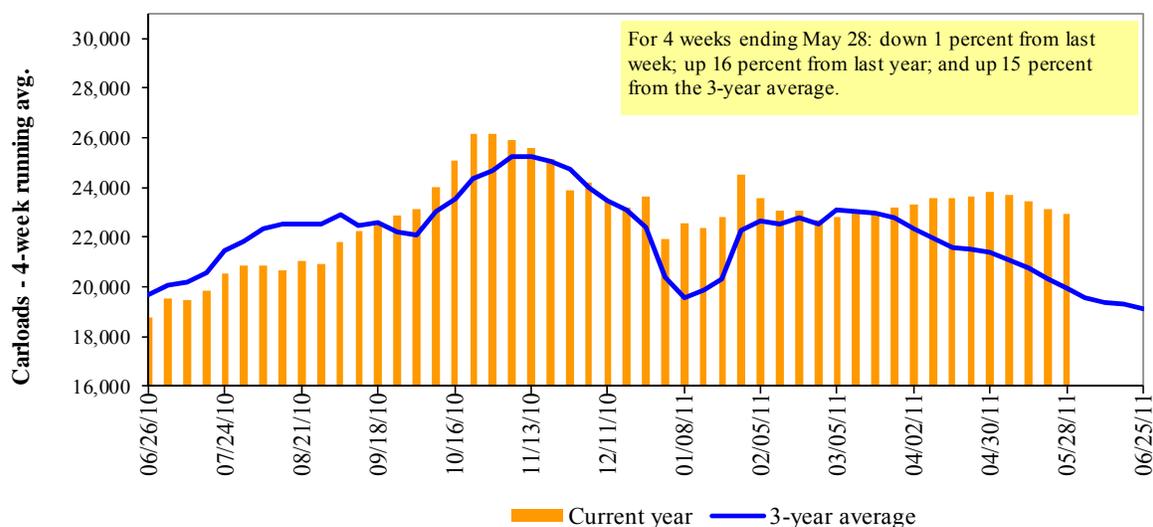
Table 4

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
05/28/11	1,807	3,162	10,928	896	6,507	23,300	3,046	5,571
This week last year	2,477	3,071	9,305	691	4,240	19,784	3,924	4,935
2011 YTD	43,949	63,931	240,488	13,667	129,786	491,821	85,251	101,209
2010 YTD	47,832	64,477	217,002	16,191	111,969	457,471	85,412	113,947
2011 YTD as % of 2010 YTD	92	99	111	84	116	108	100	89
Last 4 weeks as % of 2010 ¹	87	102	123	101	128	116	101	99
Last 4 weeks as % of 3-yr avg. ¹	84	104	127	111	119	116	94	100
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

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

Rail Car Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Jun-11	Jun-10	Jul-11	Jul-10	Aug-11	Aug-10	Sep-11	Sep-10
6/2/2011								
BNSF ³								
COT grain units	0	6	0	no bids	no offer	no bids	no offer	no offer
COT grain single-car ⁵	0	0 . . 106	0	0 . . 10	no offer	5 . . 25	no offer	30
UP ⁴								
GCAS/Region 1	no bids	1	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.

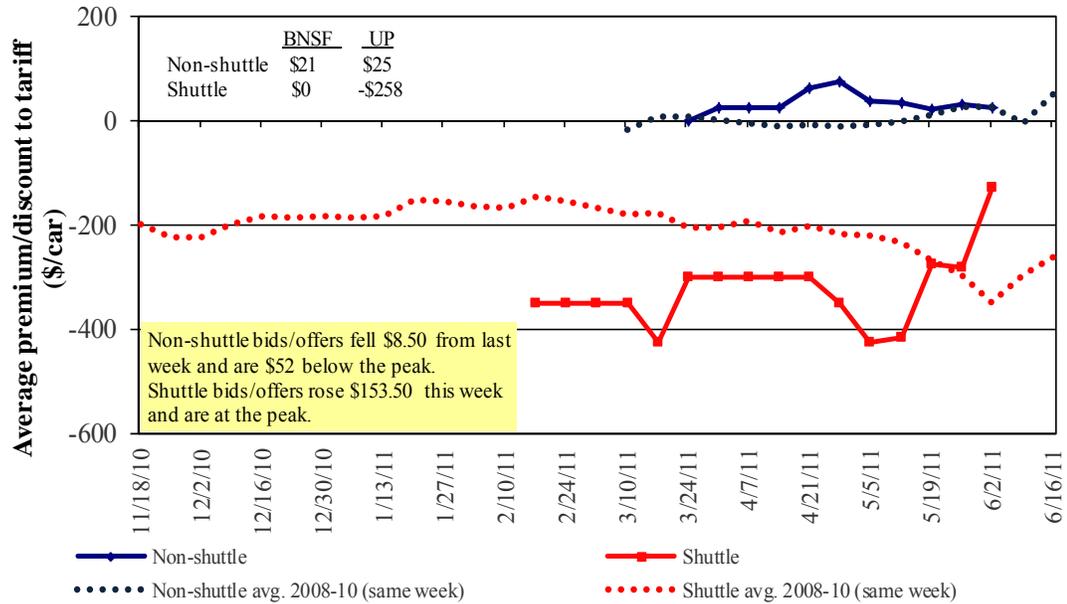
⁵Range is shown because average is not available. Not available = n/a.

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 June 2011, Secondary Market

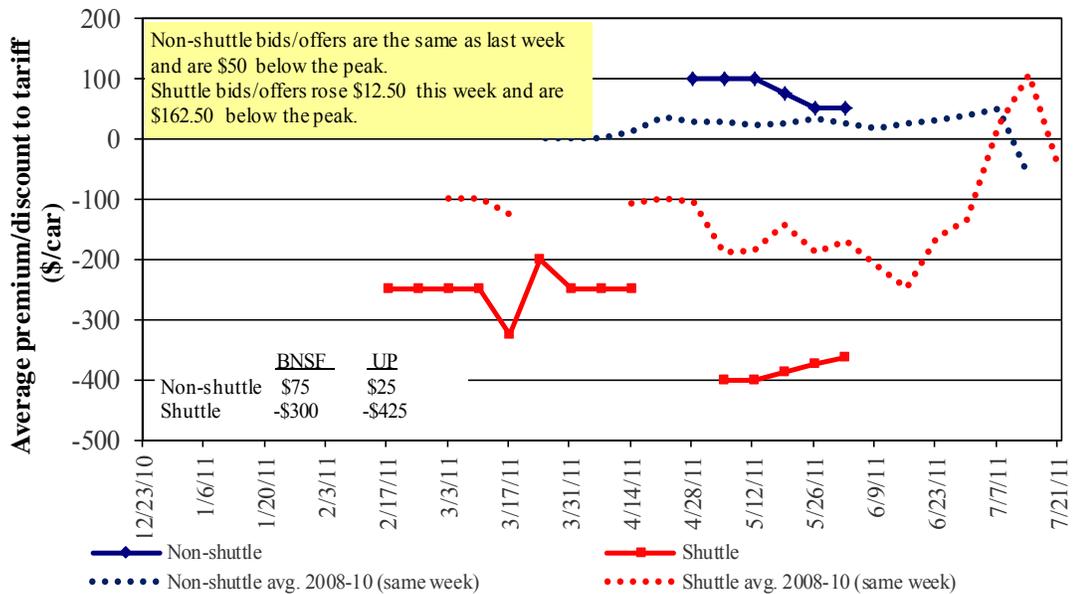


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in July 2011, Secondary Market

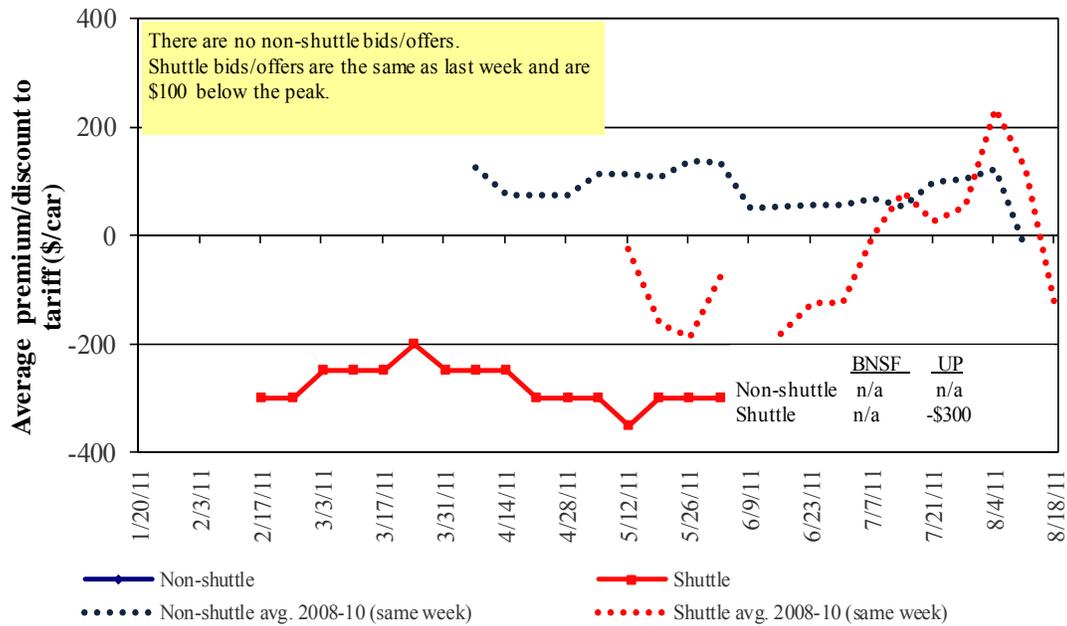


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in August 2011, 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 Rail Car Market (\$/car)¹

Week ending	Delivery period					
	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11	Nov-11
6/2/2011						
Non-shuttle						
BNSF-GF	21	75	n/a	n/a	n/a	n/a
Change from last week	(17)	-	n/a	n/a	n/a	n/a
Change from same week 2010	21	73	n/a	n/a	n/a	n/a
UP-Pool	25	25	n/a	n/a	n/a	n/a
Change from last week	-	-	n/a	n/a	n/a	n/a
Change from same week 2010	17	17	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	-	(300)	n/a	n/a	n/a	n/a
Change from last week	254	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	367	n/a	n/a	n/a	n/a	n/a
UP-Pool	(258)	(425)	(300)	(250)	700	n/a
Change from last week	53	(50)	-	-	-	n/a
Change from same week 2010	42	(175)	n/a	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:			Tariff	Fuel	Tariff plus surcharge per:		Percent	
6/6/2011	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushel ²	change Y/Y ³	
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$2,992	\$202	\$31.72	\$0.86	11	
	Grand Forks, ND	Duluth-Superior, MN	\$2,822	\$119	\$29.21	\$0.79	16	
	Wichita, KS	Los Angeles, CA	\$5,710	\$612	\$62.78	\$1.71	10	
	Wichita, KS	New Orleans, LA	\$3,492	\$356	\$38.21	\$1.04	11	
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$502	\$58.71	\$1.60	6	
	Northwest KS	Galveston-Houston, TX	\$3,760	\$390	\$41.21	\$1.12	11	
	Amarillo, TX	Los Angeles, CA	\$3,959	\$543	\$44.71	\$1.22	12	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$2,812	\$402	\$31.92	\$0.87	8	
	Toledo, OH	Raleigh, NC	\$3,760	\$450	\$41.81	\$1.14	14	
	Des Moines, IA	Davenport, IA	\$1,843	\$85	\$19.15	\$0.52	-1	
	Indianapolis, IN	Atlanta, GA	\$3,196	\$338	\$35.09	\$0.96	12	
	Indianapolis, IN	Knoxville, TN	\$2,760	\$217	\$29.56	\$0.80	12	
	Des Moines, IA	Little Rock, AR	\$2,938	\$250	\$31.66	\$0.86	7	
	Des Moines, IA	Los Angeles, CA	\$4,835	\$729	\$55.26	\$1.50	20	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,089	\$439	\$35.04	\$0.95	11	
	Toledo, OH	Huntsville, AL	\$2,921	\$320	\$32.18	\$0.88	11	
	Indianapolis, IN	Raleigh, NC	\$3,830	\$453	\$42.54	\$1.16	13	
	Indianapolis, IN	Huntsville, AL	\$2,613	\$217	\$28.10	\$0.76	11	
	Champaign-Urbana, IL	New Orleans, LA	\$3,156	\$402	\$35.34	\$0.96	10	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$352	\$35.66	\$0.97	13	
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$274	\$33.94	\$0.92	7	
	Chicago, IL	Albany, NY	\$3,497	\$422	\$38.92	\$1.06	-3	
	Grand Forks, ND	Portland, OR	\$4,702	\$608	\$52.73	\$1.44	12	
	Grand Forks, ND	Galveston-Houston, TX	\$5,648	\$633	\$62.38	\$1.70	11	
	Northwest KS	Portland, OR	\$4,727	\$640	\$53.29	\$1.45	11	
	Minneapolis, MN	Portland, OR	\$4,680	\$740	\$53.83	\$1.46	14	
Corn	Sioux Falls, SD	Tacoma, WA	\$4,640	\$678	\$52.81	\$1.44	13	
	Champaign-Urbana, IL	New Orleans, LA	\$2,677	\$402	\$30.58	\$0.83	7	
	Lincoln, NE	Galveston-Houston, TX	\$3,190	\$395	\$35.60	\$0.97	10	
	Des Moines, IA	Amarillo, TX	\$3,330	\$315	\$36.19	\$0.99	8	
	Minneapolis, MN	Tacoma, WA	\$4,680	\$734	\$53.77	\$1.46	14	
	Council Bluffs, IA	Stockton, CA	\$4,080	\$760	\$48.06	\$1.31	13	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$4,840	\$678	\$54.80	\$1.49	10
		Minneapolis, MN	Portland, OR	\$4,830	\$740	\$55.32	\$1.51	11
		Fargo, ND	Tacoma, WA	\$4,730	\$603	\$52.96	\$1.44	10
		Council Bluffs, IA	New Orleans, LA	\$3,510	\$464	\$39.46	\$1.07	9
Toledo, OH	Huntsville, AL	\$2,536	\$320	\$28.36	\$0.77	13		
Grand Island, NE	Portland, OR	\$4,520	\$655	\$51.39	\$1.40	11		

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of

90-110 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

Effective date: 6/6/2011

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel	Tariff plus surcharge per:		Percent change Y/Y ⁴
				surcharge per car ²	metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$6,854	\$643	\$76.60	\$2.08	6
	OK	Cuautitlan, EM	\$6,245	\$666	\$70.61	\$1.92	7
	KS	Guadalajara, JA	\$6,879	\$896	\$79.44	\$2.16	6
	TX	Salinas Victoria, NL	\$3,411	\$269	\$37.60	\$1.02	5
Corn	IA	Guadalajara, JA	\$7,057	\$935	\$81.66	\$2.07	6
	SD	Penjamo, GJ	\$6,521	\$842	\$75.23	\$1.91	-1
	NE	Queretaro, QA	\$6,802	\$852	\$78.20	\$1.98	14
	SD	Salinas Victoria, NL	\$5,360	\$640	\$61.30	\$1.56	13
	MO	Tlalnepantla, EM	\$5,959	\$830	\$69.37	\$1.76	15
	SD	Torreón, CU	\$5,623	\$705	\$64.66	\$1.64	3
Soybeans	MO	Bojay (Tula), HG	\$6,705	\$818	\$76.86	\$2.09	10
	NE	Guadalajara, JA	\$7,519	\$930	\$86.33	\$2.35	15
	IA	El Castillo, JA ⁵	\$7,770	\$836	\$87.94	\$2.39	12
	KS	Torreón, CU	\$6,042	\$640	\$68.27	\$1.86	15
Sorghum	OK	Cuautitlan, EM	\$5,350	\$639	\$61.19	\$1.55	18
	TX	Guadalajara, JA	\$6,289	\$548	\$69.85	\$1.77	12
	NE	Penjamo, GJ	\$6,905	\$860	\$79.34	\$2.01	8
	KS	Queretaro, QA	\$6,038	\$588	\$67.69	\$1.72	13
	NE	Salinas Victoria, NL	\$4,818	\$560	\$54.95	\$1.39	13
	NE	Torreón, CU	\$5,804	\$687	\$66.32	\$1.68	11

¹ 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.

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

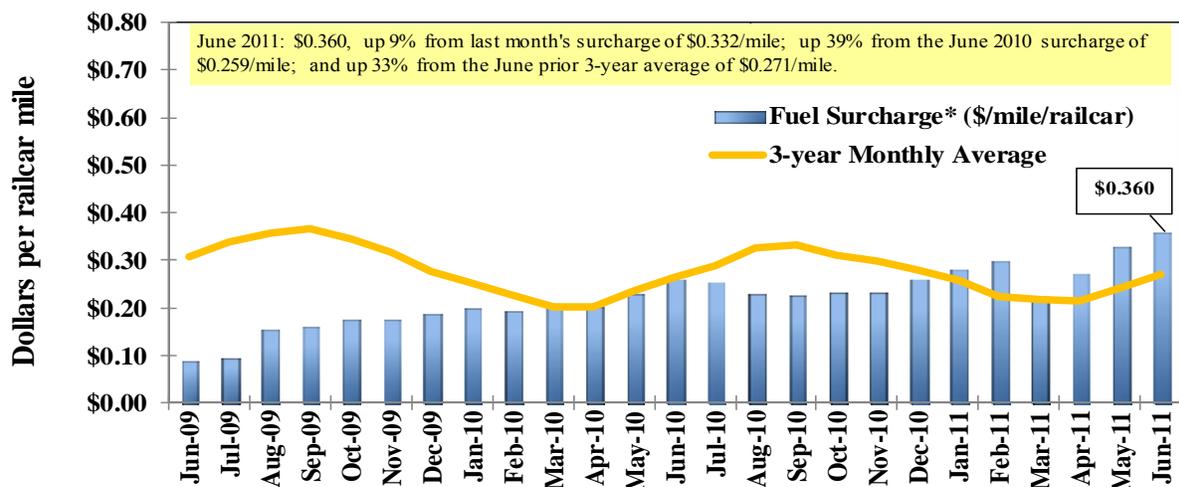
³ Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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

Sources: www.bnsf.com, www.upr.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.

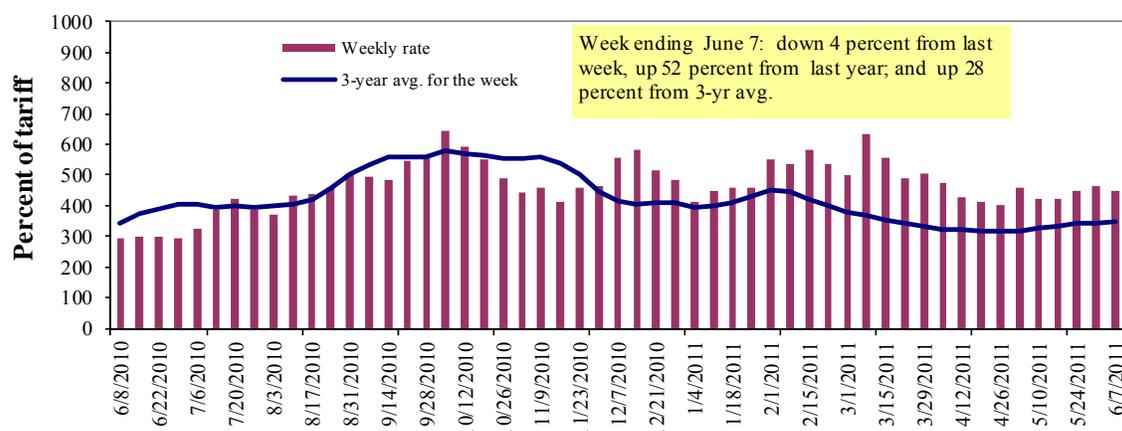
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.ksis.com, www.nscorp.com, www.upr.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

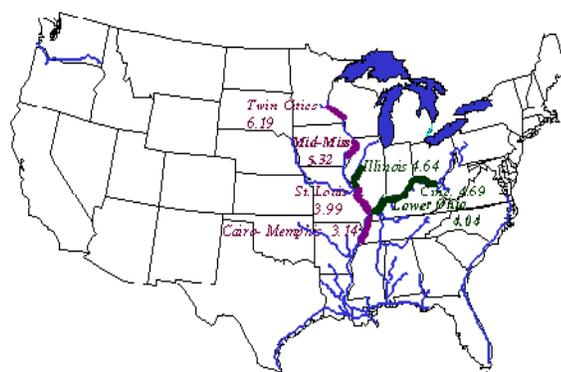
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	6/7/2011	550	472	447	343	411	411	313
	5/31/2011	542	485	463	350	438	438	308
\$/ton	6/7/2011	34.05	25.11	20.74	13.69	19.28	16.60	9.83
	5/31/2011	33.55	25.80	21.48	13.97	20.54	17.70	9.67
Current week % change from the same week:								
	Last year	52	58	52	73	57	57	66
	3-year avg. ²	33	30	28	28	41	41	24
Rate¹	July	543	453	443	345	413	413	330
	September	650	638	638	603	645	645	600

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



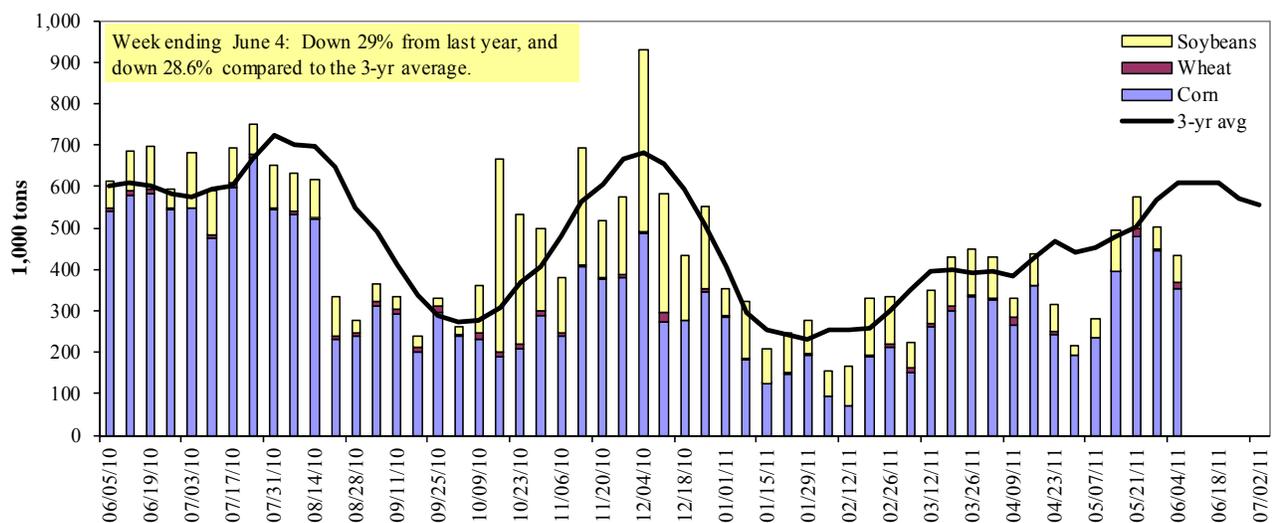
Calculating barge rate per ton:

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

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 River¹ (Locks 27 - Granite City, IL)



¹ The 3-year average is a 4-week moving average.

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

Table 10

Barge Grain Movements (1,000 tons)

Week ending 6/4/2011	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	175	6	28	0	209
Winfield, MO (L25)	265	10	60	0	335
Alton, IL (L26)	358	14	71	0	443
Granite City, IL (L27)	352	17	66	2	437
Illinois River (L8)	151	2	16	0	169
Ohio River (L52)	69	5	22	0	97
Arkansas River (L1)	0	7	3	0	10
Weekly total - 2011	421	30	91	2	543
Weekly total - 2010	647	16	111	12	786
2011 YTD ¹	7,779	515	3,491	136	11,920
2010 YTD	9,489	452	3,779	201	13,921
2011 as % of 2010 YTD	82	114	92	67	86
Last 4 weeks as % of 2010 ²	71	153	95	23	76
Total 2010	22,768	1,220	10,373	481	34,841

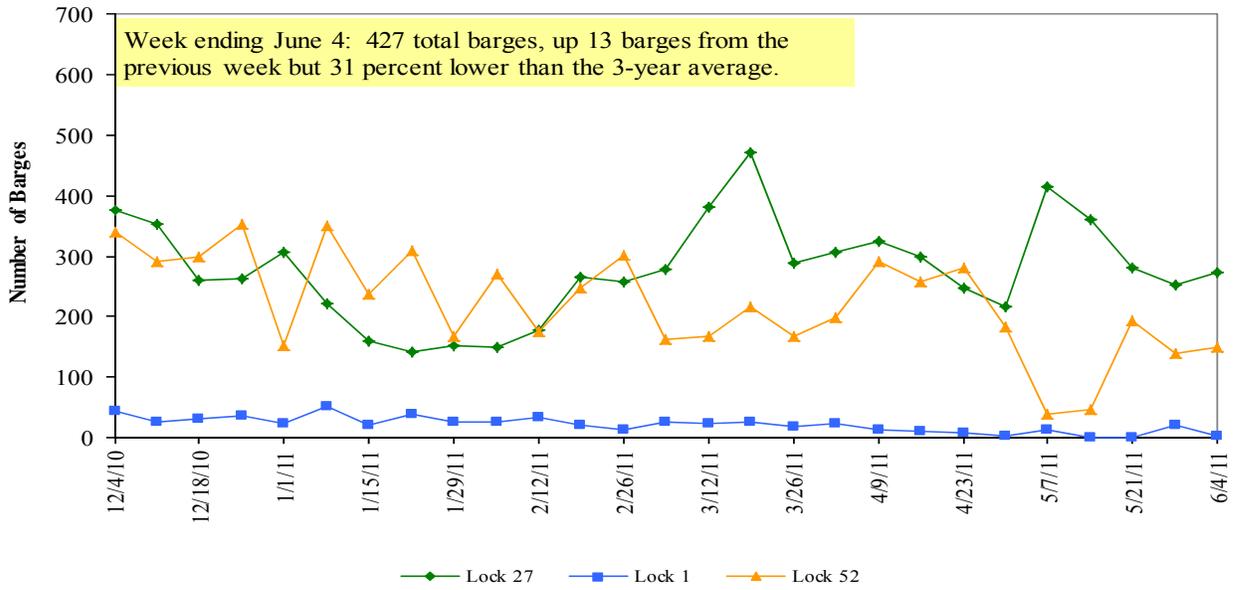
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

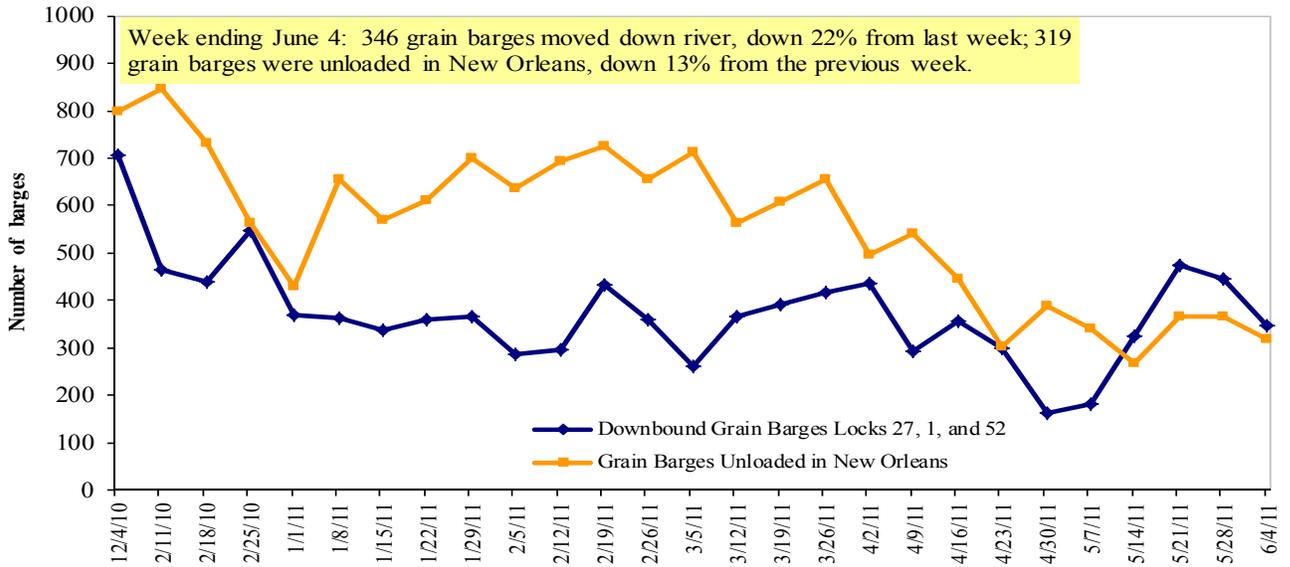
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrirmi/omni/webprpts/default.asp)

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 Prices¹, Week Ending 6/6/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.955	-0.007	0.982
	New England	4.105	-0.016	1.060
	Central Atlantic	4.074	-0.008	0.984
	Lower Atlantic	3.891	-0.006	0.975
II	Midwest ²	3.889	-0.007	0.985
III	Gulf Coast ³	3.877	-0.007	0.978
IV	Rocky Mountain	4.015	-0.005	0.995
V	West Coast	4.146	-0.015	1.088
	California	4.223	-0.004	1.155
Total	U.S.	3.940	-0.008	0.994

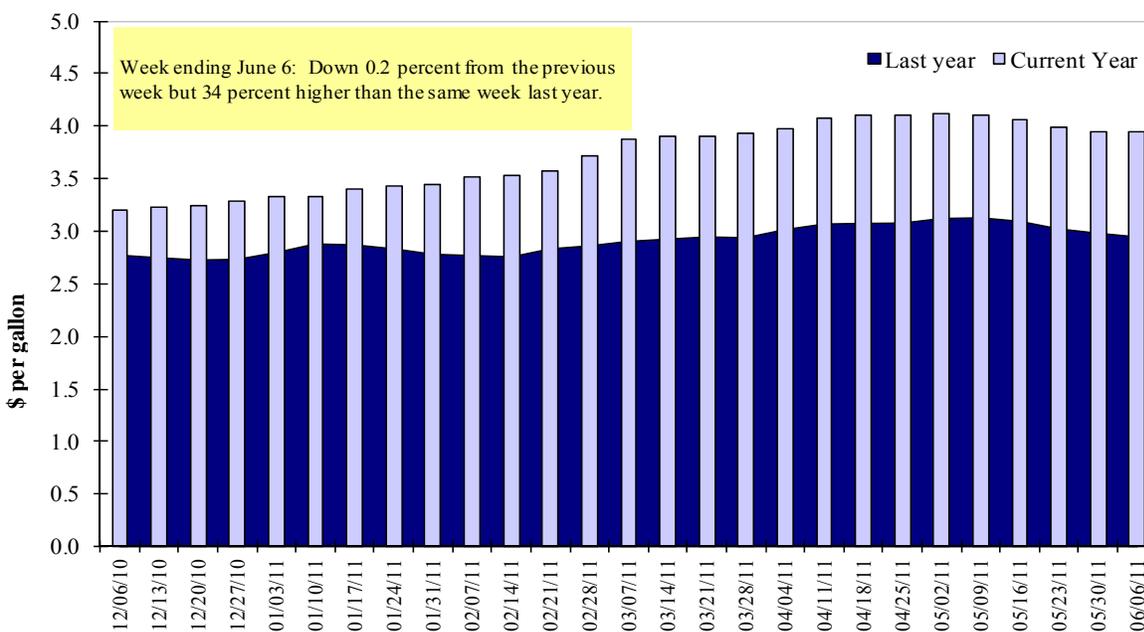
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
5/26/2011	1,024	109	626	551	11	2,320	10,615	4,240	17,175
This week year ago	340	252	323	258	40	1,213	10,262	2,166	13,641
Cumulative exports-marketing year²									
2010/11 YTD	15,837	2,828	8,623	4,717	979	32,984	32,867	37,318	103,169
2009/10 YTD	8,458	2,733	5,329	3,897	983	21,400	34,562	36,264	92,226
YTD 2010/11 as % of 2009/10	187	103	162	121	100	154	95	103	112
Last 4 wks as % of same period 2009/10	502	89	296	272	75	298	108	207	141
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385
2008/09 Total	11,244	5,100	5,408	3,420	454	25,626	44,650	33,705	103,981

¹ Current unshipped export sales to date

² Shipped export sales to date; the new marketing year now in effect 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 05/26/11	Total Commitments ²			% change current MY from last MY	Exports ³ 2009/10
	2011/12 Next MY	2010/11 Current MY	2009/10 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	723	13,455	13,227	2	14,343
Mexico	1,259	6,575	7,597	(13)	7,999
Korea	1	5,367	7,147	(25)	7,562
Taiwan	0	2,394	2,797	(14)	2,949
Egypt	40	2,742	2,074	32	2,935
Top 5 importers	2,024	30,534	32,842	(7)	35,788
Total US corn export sales	3,841	43,482	44,824	(3)	50,460
% of Projected	8%	90%	89%		
Change from Last Week	229	472	199		
Top 5 importers' share of U.S. corn export sales	53%	70%	73%		
USDA forecast, May 2011	45,720	48,260	50,460	(4)	
Corn Use for Ethanol USDA forecast, Ethanol May 2011	128,270	127,000	116,027	9	

(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.

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

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 05/26/2011	Total Commitments ²			% change current MY from last MY	Exports ³ 2009/10
	2011/12 Current MY	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	5,958	25,556	22,136	15	22,454
Mexico	89	2,917	2,962	(1)	3,276
Japan	119	2,047	2,177	(6)	2,347
EU-25	60	2,599	2,698	(4)	2,647
Taiwan	0	1,352	1,485	(9)	1,556
Top 5 importers	6,226	34,470	31,457	10	32,280
Total US soybean export sales	6,790	41,557	38,430	8	40,850
% of Projected	16%	99%	94%		
Change from last week	67	83	35		
Top 5 importers' share of U.S. soybean export sales	92%	83%	82%		
USDA forecast, May 2011	41,910	42,180	40,850	3	
Soybean Use for Biodiesel USDA forecast, May 2011	8,393	5,995	4,076	47	

(n) indicates negative number.

¹Based on FAS 2008/09 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.³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 05/26/2011	Total Commitments ²			% change current MY from last MY	Exports ³ 2009/10
	2011/12 Next MY	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -				- 1,000 mt -
Nigeria	338	3,868	3,501	10	3,233
Japan	304	3,599	3,363	7	3,148
Mexico	542	2,666	2,014	32	1,975
Philippines	741	1,871	1,571	19	1,518
Korea, South	101	1,693	1,209	40	1,111
Taiwan	115	953	844	13	844
Venezuela	126	640	719	(11)	658
Colombia	206	767	575	33	575
Peru	156	998	563	77	567
Egypt	783	4,021	456	783	529
Top 10 importers	3,412	21,076	14,816	42	14,156
Total US wheat export sales	4,345	35,304	22,613	56	23,980
% of Projected	15%	102%	94%		
Change from last week	339	(74)	(53)		
Top 10 importers' share of U.S. wheat export sales	79%	60%	66%		
USDA forecast, May 2011	28,580	34,700	23,980	45	

(n) indicates negative number.

¹Based on FAS 2008/09 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.³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

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

Port regions	Week ending 06/02/11	Previous Week ¹	Current Week as % of Previous	2011 YTD ¹	2010 YTD ¹	2011 YTD as % of 2010 YTD	Last 4-weeks as % of		Total ¹ 2010
							2010	3-yr. avg.	
Pacific Northwest									
Wheat	343	438	78	6,445	4,500	143	186	179	11,062
Corn	194	182	107	3,931	4,210	93	111	103	9,950
Soybeans	0	0	n/a	3,095	4,248	73	248	51	10,191
Total	537	620	87	13,471	12,959	104	148	129	31,203
Mississippi Gulf									
Wheat	30	39	77	2,369	1,679	141	96	86	4,199
Corn	515	555	93	11,348	12,529	91	76	93	29,794
Soybeans	51	158	32	9,394	8,529	110	85	67	22,519
Total	596	752	79	23,111	22,736	102	79	87	56,512
Texas Gulf									
Wheat	203	251	81	6,428	3,331	193	182	173	9,339
Corn	58	49	119	625	920	68	87	178	1,859
Soybeans	0	0	n/a	763	667	114	n/a	n/a	1,916
Total	261	300	87	7,816	4,919	159	162	173	13,115
Great Lakes									
Wheat	32	46	70	500	199	251	452	682	1,897
Corn	0	0	n/a	8	31	27	55	47	119
Soybeans	0	15	0	22	0	n/a	n/a	123	655
Total	32	60	53	531	230	231	387	350	2,672
Atlantic									
Wheat	0	46	0	519	127	410	387	603	343
Corn	9	6	151	162	169	96	113	228	469
Soybeans	4	5	88	414	685	60	215	81	1,417
Total	13	56	24	1,096	980	112	243	265	2,229
U.S. total from ports²									
Wheat	608	820	74	16,261	9,837	165	178	171	26,839
Corn	776	791	98	16,075	17,859	90	85	98	42,192
Soybeans	55	177	31	13,688	14,128	97	105	65	36,699
Total	1,440	1,788	81	46,024	41,824	110	113	115	105,730

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

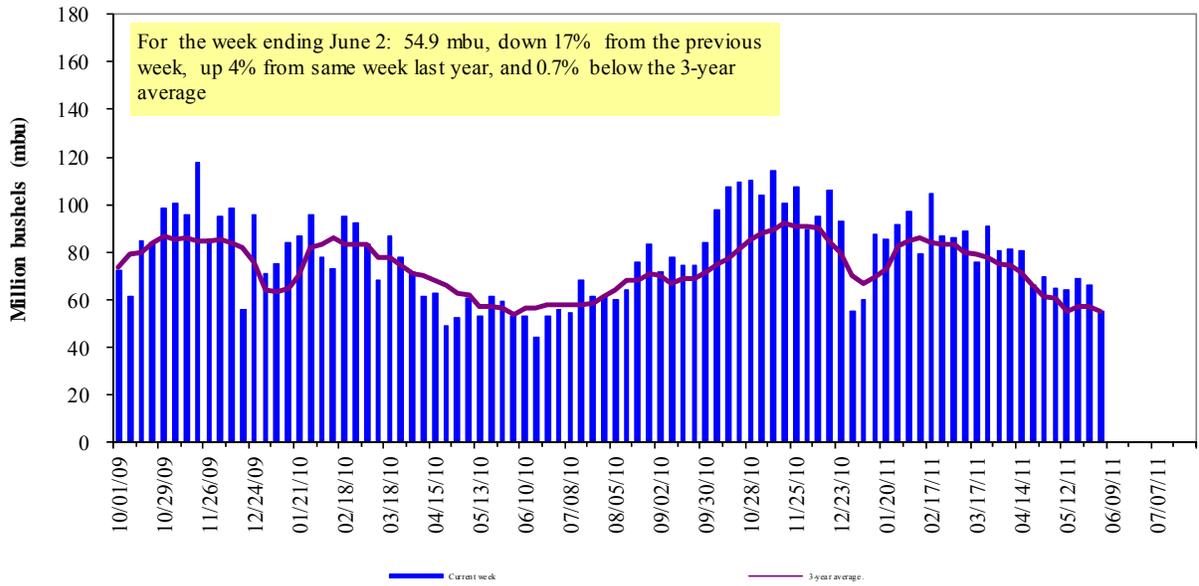
² Total includes only port regions shown above

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

Figure 14

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

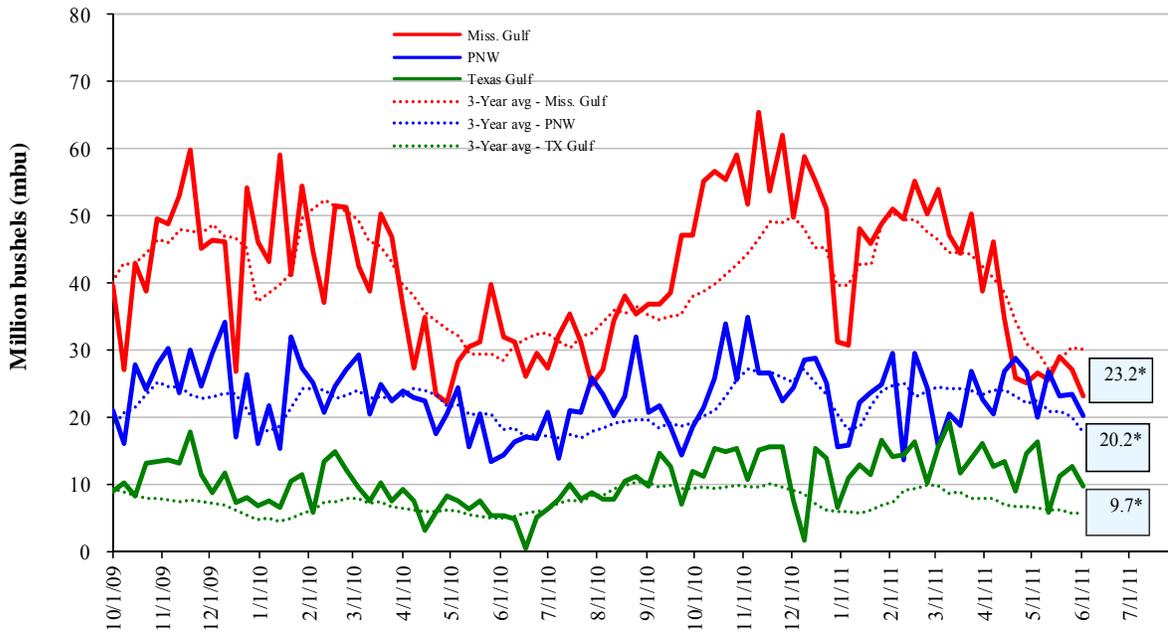


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

June 2% change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 14	down 23	down 17	down 13
Last year (same week)	down 28	up 85	down 12	up 40
3-yr avg. (4-wk mov. avg.)	up 23	up 71	down 8	up 23

Ocean Transportation

Table 17

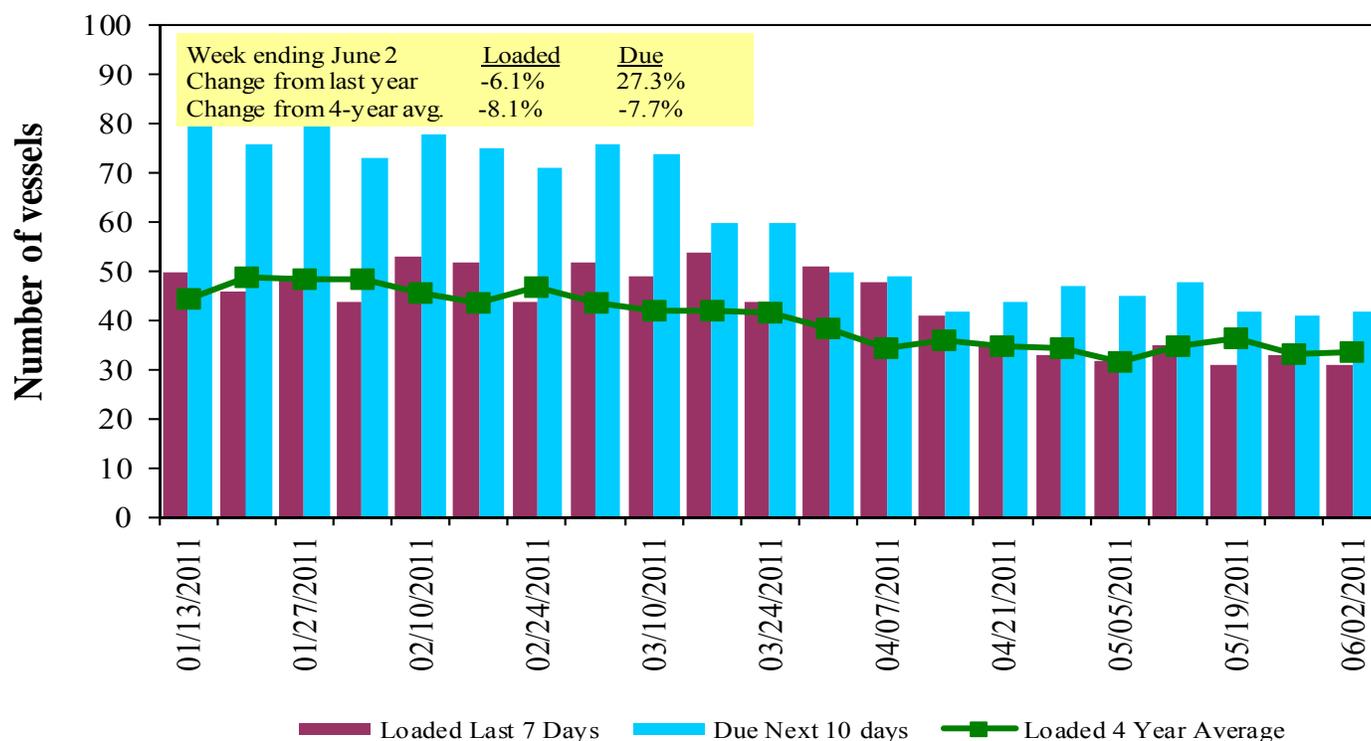
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
6/2/2011	22	31	42	19	16
5/26/2011	27	33	41	13	15
2010 range	(15..69)	(30..57)	(33..84)	(4..24)	(2..20)
2010 avg.	41	42	58	12	11

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

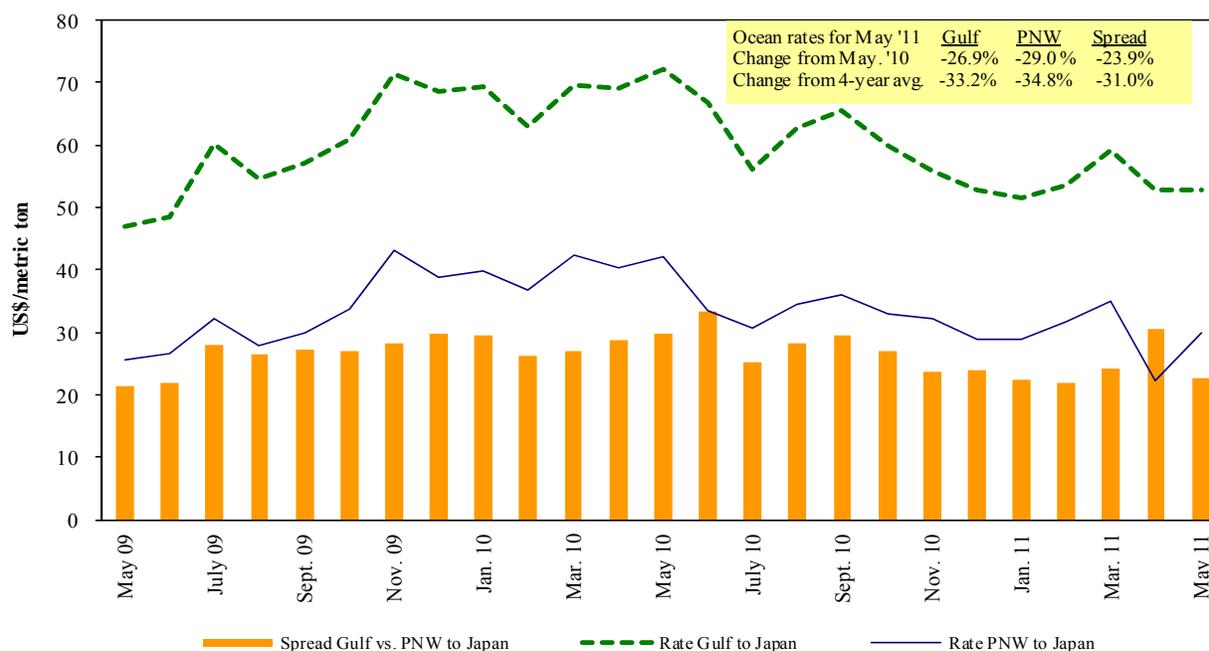


Source: Transportation & Marketing Programs/AMS/USDA

¹U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 06/04/2011

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	May 1/10	55,000	56.00
U.S. Gulf	China	Heavy Grain	Mar 20/29	52,000	52.00
U.S. Gulf	China	Heavy Grain	Mar 8/15	55,000	53.60
U.S. Gulf	Egypt	Grain	May 1/10	60,000	28.50
U.S. Gulf	Japan	Heavy Grain	June 1/12	54,000	52.50
U.S. Gulf	Israel	Wheat	May 20/30	50,000	36.00
U.S. Gulf	Nicaragua	Corn/Soybean meal	Feb 7/17	24,000	56.42
U.S. Gulf	Nigeria	Wheat	Apr 17/23	25,000	46.50
U.S. Gulf	Djibouti ¹	Wheat	Mar 31/Apr 9	17,260	129.95
PNW	Rotterdam	Heavy Grain	Feb 15/25	55,000	26.00
Brazil	China	Heavy Grain	May 18/27	60,000	49.50
Brazil	China	Heavy Grain	April 5/15	60,000	51.00
Brazil	China	Heavy Grain	April 1/15	55,000	47.00
Brazil	Turkey	Heavy Grain	May 20/30	50,000	32.00
River Plate	Algeria	Corn	June 15/25	25,000	42.75
River Plate	Algeria	Corn	May 15/25	25,000	42.25
River Plate	Algeria	Corn	Apr 15/25	25,000	41.50
River Plate	Algeria	Corn	April 15/25	30,000	41.50
River Plate	Morocco	corn	Feb 28/Mar 8	25,000	37.25
River Plate	Morocco	Heavy Grain	Apr 25/28	2,500	44.50
River Plate	Spain	Maize	May 16/18	25,000	44.00
River Plate	Spain	Corn	Apr 24/25	2,500	46.00
Ukraine	Spain Med	Corn	May 20/24	25,000	18.00
Uruguay	Algeria	Wheat	Feb 5/10	25,000	46.00

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

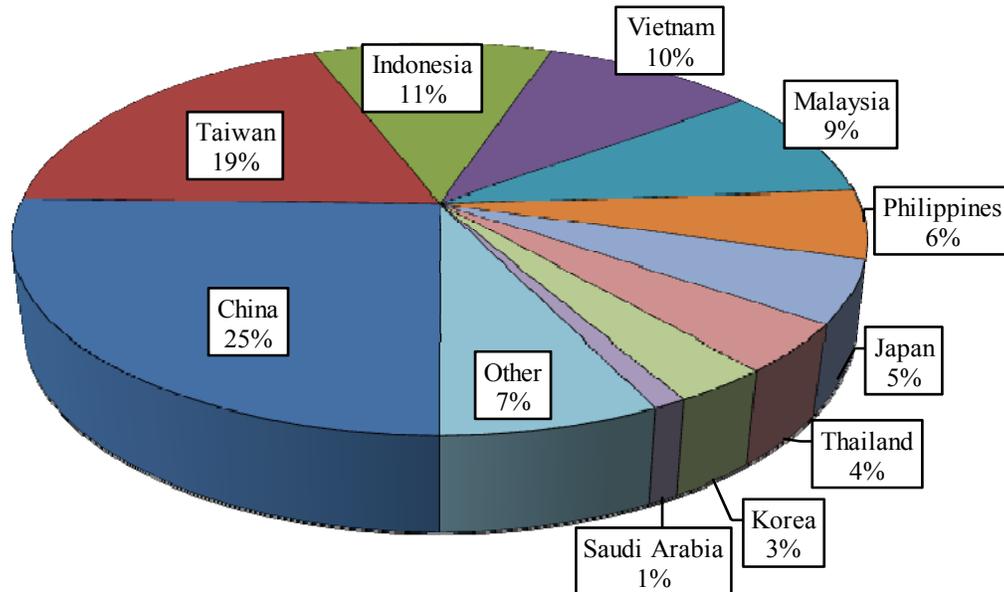
¹75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, January 2011

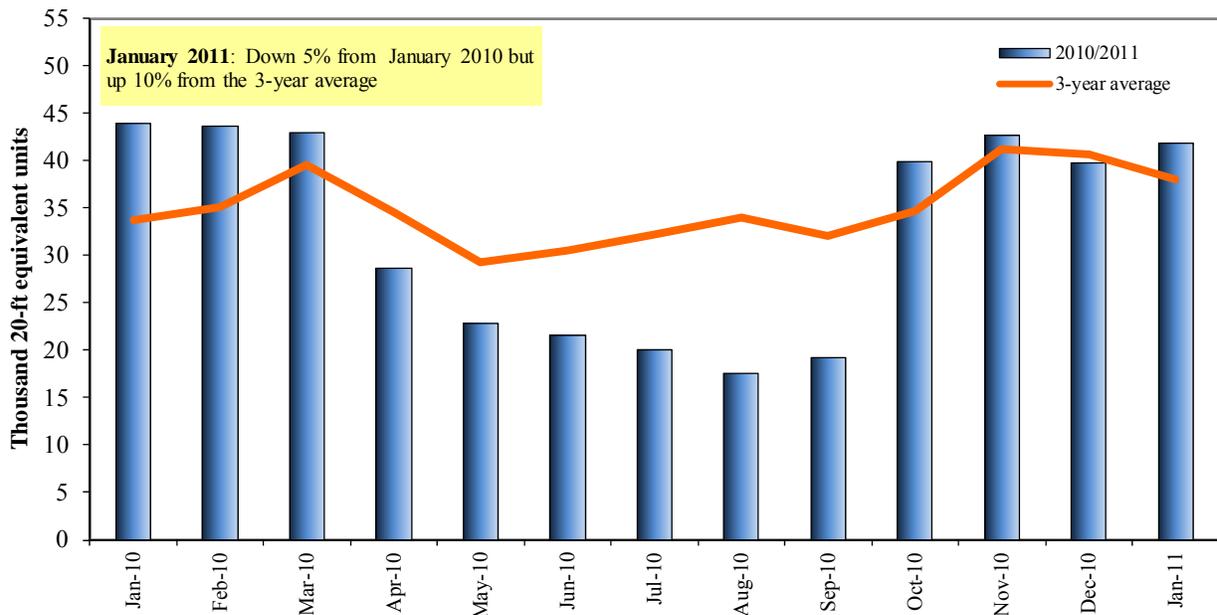


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 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 (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

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