



# Grain Transportation Report

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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July 18, 2013

## WEEKLY HIGHLIGHTS

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### Corn Inspections Highest Since March

For the week ending July 11, U.S. inspections of corn for export reached .414 million metric tons (mmt), up 98 percent from last week but 28 percent below last year. Corn inspections were at their highest since March 28 and were 9 percent above the 4-week running average. Soybean inspections (.100 mmt) rebounded from last week, increasing over 100 percent as shipments to Mexico increased. **Total grain inspections** (corn, wheat, and soybeans) reached 1.18 million metric tons (mmt), up 13 percent from the previous week but 15 percent below this time last year. Total inspections also increased in each of the three major export regions. Outstanding (unshipped) export sales were up for corn and wheat.

### Normal Operational Conditions on Most of the River System

Barge operators are reporting near-normal operational conditions on the Upper Mississippi and Illinois Rivers. On July 18, the St. Louis Mississippi River gage level was 17 feet, significantly better for barge navigation than last July, when the river averaged 4.5 feet for the month. The Ohio River has some minor flooding at Cairo, IL, but without navigation delays. Rains and resulting flooding have slowed some traffic on the Tennessee River.

### Wheat Barge Movements Surge on Strong SRW Wheat Exports

During the week ending July 13, **wheat barge movements** on the Mississippi River System totaled more than 197,000 tons, up nearly 400 percent from the 5-year average—movements over the past 4 weeks are 162 percent higher than average for this time of year. This increase could be partially explained by the strong new-crop wheat export sales. For the week ending July 4, wheat export sale commitments totaled 10.6 million metric tons (mmt), 42.5 percent higher than last year at this time. Soft Red Winter (SRW) wheat export sales since the beginning of the marketing year on June 1 have been almost 4 times that of last year, mainly destined to China. In July, USDA raised its forecast of total wheat imports by China to 8.5 mmt, up from 3.2 mmt the previous year. As of July 4, China had already purchased 2.8 mmt of SRW. SRW wheat is grown in many areas near the Arkansas, Illinois, and Ohio Rivers. Wheat shippers in these regions benefit from proximity to barge transportation at this time of the year as the wheat harvest does not coincide with the later maturing corn and soybean crops. With an adequate supply of barges currently, the waterways offer an economical mode for moving this variety of wheat to the Louisiana Gulf port for export. USDA projects U.S. wheat exports in 2013/14 to reach 29.3 mmt, 6 percent higher than the previous year.

## Snapshots by Sector

### **Rail**

U.S. railroads originated 14,893 **carloads of grain** during the week ending July 6, down 6 percent from last week, 9 percent from last year, and 25 percent from the 3-year average.

During the week ending July 11, average July non-shuttle **secondary railcar bids/offers per car** were 50 cents above tariff, unchanged from last week and \$12 lower than last year. Average shuttle bids/offers were \$100 below tariff, up \$51 from last week and \$131.50 higher than last year.

### **Barge**

During the week ending July 13, **barge grain movements** totaled 610,450 tons, 62.3 percent higher than the previous week and 16 percent higher than the same period last year.

During the week ending July 13, 398 grain barges **moved down river**, up 63 percent from last week; 430 grain barges were **unloaded in New Orleans**, up 49.8 percent from the previous week.

### **Ocean**

During the week ending July 11, 25 **ocean-going grain vessels** were loaded in the Gulf, up 9 percent from the same period last year. Forty-nine vessels are expected to be loaded within the next 10 days, up 40 percent from the same period last year.

During the week ending July 11, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$45.50 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$24 per mt, unchanged from the previous week.

# Feature Article/Calendar

## Grain Transportation Update

Despite persistent flooding in the spring, if weather conditions remain normal through the rest of the corn and soybean growing season, grain production and exports could recover from the extreme drought of 2012. USDA projects grain exports to increase by 24 percent from the previous year. The implied demand for transportation services this fall is mainly for barge and rail to move the grain from the heartland to ports for export. Most recently, grain movements have been slow, but could show signs of improvement as some farmers may be reacting to higher prices by selling the old crop and making room for the new crop in the fall.

### Expected Recovery in New Crop Grain Production and Exports

Based on USDA's July World Agricultural Supply and Demand Estimates Report and June 28th Acreage report, the 2013/14 corn, soybeans, and wheat crops are expected to rebound to a record 19.5 billion bushels (bbu) this fall, 21 percent higher than last year. USDA also projects grain exports to reach almost 3.8 billion bushels, which is 24 percent higher than the previous year. With normal weather, corn yield could return to trend yields. The August 12 report will have production estimates based on surveys and will make the picture more certain for the fall harvest. The increase in grain exports implies a rise in demand for transportation services in the upcoming corn and soybean marketing year. The 2013/14 winter wheat harvest is almost complete and wheat export sales as of July 4 have been stronger than usual. Wheat unshipped balances are 65 percent higher than last year at this time, indicating demand for rail wheat shipments may be increasing in the near term.

Table 1. Major Grains: Production and Use, July 2013 WASDE, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2013/14 (Projected)					
Production	13,950	3,420	2,114	19,484	21.3%
Exports	1,250	1,450	1,075	3,775	24.2%
Domestic Use	11,500	1,814	1,311	14,625	7.0%
Ending Stocks/Use	15.4%	9.0%	24.1%		
United States 2012/13 (Estimated)					
Production	10,780	3,015	2,269	16,064	-8.0%
Exports	700	1,330	1,009	3,039	-23.1%
Domestic Use	10,500	1,755	1,407	13,662	-2.1%
Ending Stocks/Use	6.5%	4.1%	29.7%		
2011/12					
Production	12,360	3,094	1,999	17,453	
Exports	1,543	1,362	1,048	3,953	
Domestic Use	10,985	1,793	1,183	13,961	
Ending Stocks/Use	7.9%	5.4%	33.3%		

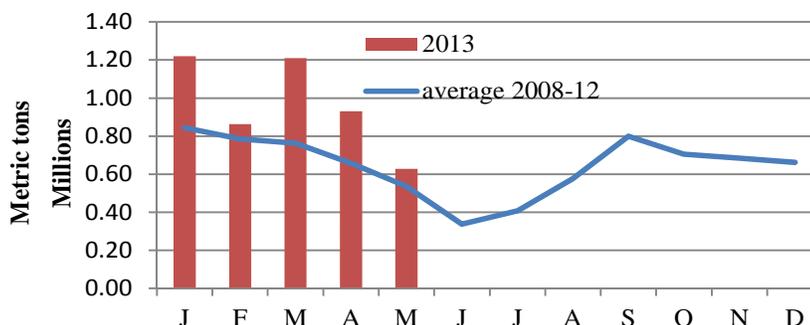
Grain prices over the past quarter have been unusually strong, with the average national corn and soybean basis levels reported by the DTN grain news service trading at record levels over the near-month futures, indicating strong domestic and export demand. Higher prices and better navigating conditions may have finally helped increase barge grain movements. For the first time since December 2012, barge movements of grain during the week ending July 16 reached over 600,000 tons.

### Fertilizer Imports up, Grain Barge Movements Down

So far this year, volumes of fertilizer imported into New Orleans have been above average. Figure 1 shows January through May monthly fertilizer imports for 2013 are each above average. Volumes in the first 5 months amount to 4.9 million metric tons (mmt), 35 percent higher than the 5-year average. In addition to imports, an additional amount of domestically produced fertilizer is typically shipped to New Orleans to be loaded onto barges for final use at points upriver, but data is not available to quantify the exact amount. For the first 21 weeks of 2013 (approximately January through May), upbound fertilizers through the locking portions of the Mississippi, Ohio, and Arkansas Rivers amounted to 4.2 million metric tons.

Average weekly shipments of downbound grain for the locking section of the river are shown in Table 2. Second quarter average weekly movements were 332,000 tons per week, about 44 percent lower than the average second

Figure 1- Fertilizer imports to New Orleans Customs District, 2013 and 5-year average



Source: USDA-FAS, Global Agricultural Trade System, Imported Commodities for Consumption

quarter, navigation conditions had extreme variations because of the extended drought that nearly stopped mid-Mississippi River traffic, followed by high water that turned to flooding on many of the rivers by mid-April. With only 2 weeks of data, average weekly third-quarter barge movements are 7 percent below the 3-year average, but 10 percent above third quarter 2012, when the drought drastically reduced water levels.

**Table 2: Average Weekly Grain Barge Shipments and Annual Total**

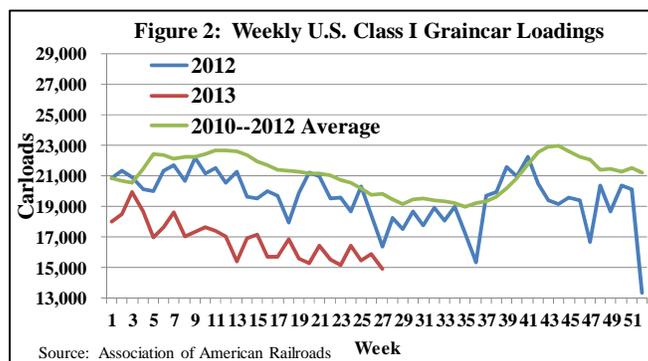
Year	Average Weekly Shipments				Annual Total
	1st quarter	2d quarter	3d quarter	4th quarter	
	1,000 short tons				
2010	576	692	630	762	34,584
2011	570	510	508	746	30,355
2012	631	578	449	613	29,523
2013	437	332	493*		
<b>3 yr. avg.</b>	<b>592</b>	<b>593</b>	<b>529</b>	<b>707</b>	<b>31,487</b>

Source: GTR compilation of confidential U.S. Army Corps of Engineers data

\* as of July 13, 2013

### Rail Graincar Loadings Decrease with Exports

Graincar loadings for the first 27 weeks of 2013 were 452,576, down 17 percent from last year and 22 percent from the 3-year average (Figure 2). The 23 percent drop in estimated 2012/13 export grain movements accounts for much of the decreased graincar loadings to date (Table 1). The railroad share of export grain movements is 50 percent; the railroad share of domestic grain movements is only 22 percent. Secondary bids/offers for delivery of empty railcars have been close to the 3-year average for non-shuttle trains but have been higher than average for shuttle trains, despite lower than normal carloadings. The average monthly difference between current weekly bids and their 3-year average increased from \$84 per car above average in January to \$212 above average in July. However, the average difference for September weekly bids, when carloadings are expected to begin increasing, is only \$100 per car above their 3-year average.



### Bulk Ocean Freight Rates Continue to Remain Low

Ocean freight rates for shipping bulk commodities, including grain, remained lower during the second quarter of 2013 than a year earlier, as more vessels were continually added to the fleet and demand was unable to keep up with the vessel supply. The low rates continued through the second week of July. As of July 11, the cost of shipping grain from the U.S. Gulf to Japan was \$45.50 per metric ton (mt)—10 percent less than a year ago and 17 percent below the 4-year average. The cost of shipping from the Pacific Northwest to Japan was \$24 per mt—16 percent less than a year ago and 19 percent less than the 4-year average. As of June, 398 dry bulk vessels were delivered so far this year, representing 33.3 million deadweight tons (mdwt) of capacity. Of the newly delivered vessels, 129 were Panamax, representing 10.6 mdwt of capacity.

### Diesel Fuel Expected to Fall Slightly this Summer

After decreasing 16 cents per gallon during the second quarter, diesel fuel prices increased 4 cents last week to \$3.87 per gallon. Crude oil prices have been increasing recently and jumped above \$106 per barrel on July 10, their highest level in over a year. Dwindling crude stockpiles and instability in Egypt are partly responsible for the recent increases in oil prices. The Energy Information Administration (EIA) reported that U.S. crude oil production increased to an average of 7.3 million barrels per day (bbl/d) in April and May 2013, the highest level of production since 1992. EIA also projected total U.S. crude oil production to average 7.3 million bbl/d in 2013. [GTRContactUs@ams.usda.gov](mailto:GTRContactUs@ams.usda.gov)



# 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			
07/10/2013 <sup>p</sup>	314	696	975	193	2,178	07/06/13	1,075
07/03/2013 <sup>r</sup>	145	1,359	1,454	96	3,054	06/29/13	1,473
2013 YTD <sup>r</sup>	9,620	33,328	73,158	9,508	125,614	2013 YTD	32,473
2012 YTD <sup>r</sup>	4,039	21,262	113,170	10,685	149,156	2012 YTD	57,686
2013 YTD as % of 2012 YTD	238	157	65	89	84	% change YTD	56
Last 4 weeks as % of 2012 <sup>2</sup>	665	150	36	51	62	Last 4wks % 2012	82
Last 4 weeks as % of 4-year avg. <sup>2</sup>	164	128	37	37	60	Last 4wks % 4 yr	68
Total 2012	22,604	40,780	199,419	34,167	287,462	Total 2012	92,008
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2011	97,118

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

<sup>2</sup> Compared with same 4-weeks in 2012 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.

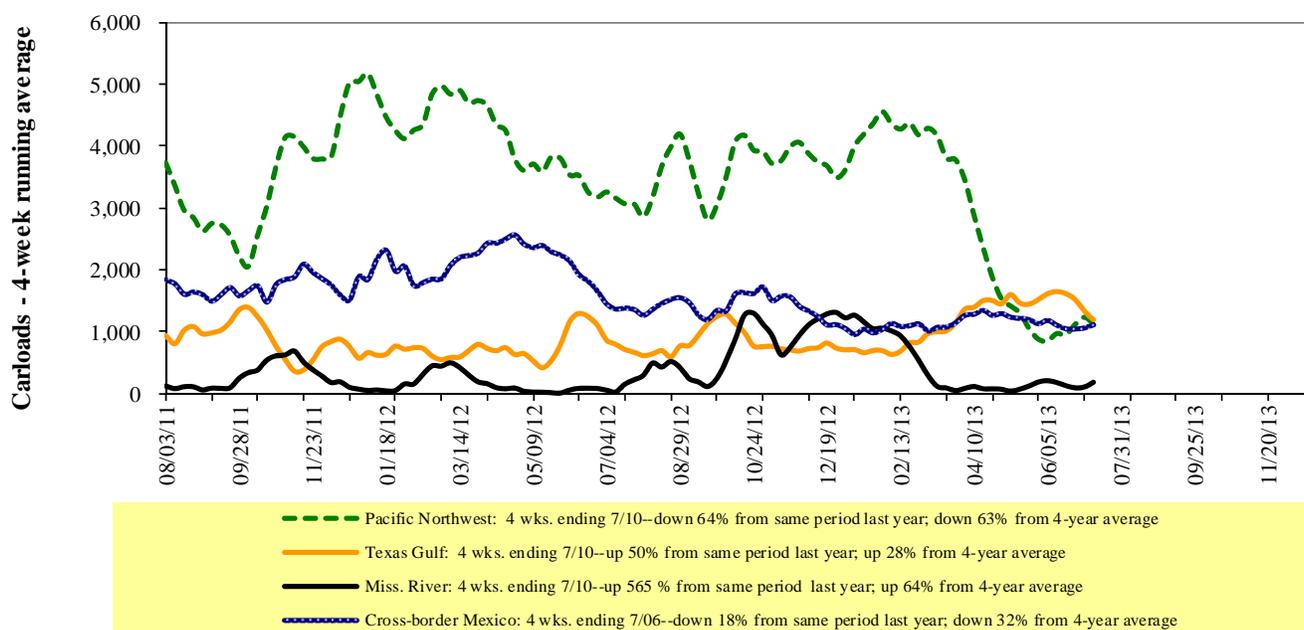
**YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available**

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

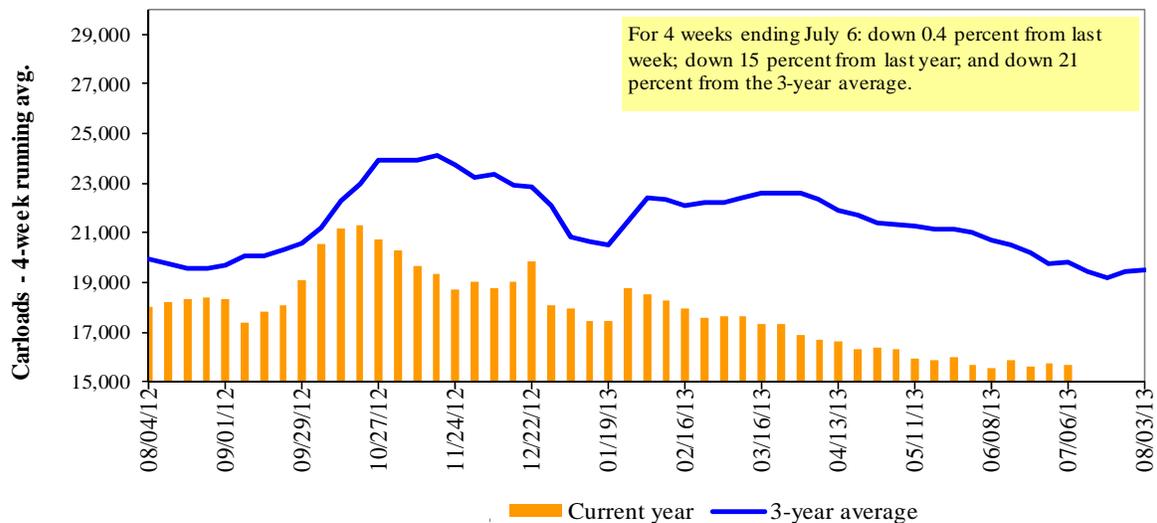
Table 4

**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
07/06/13	1,412	2,580	7,150	382	3,369	14,893	2,429	3,646
This week last year	1,472	2,542	7,575	404	4,365	16,358	3,535	3,896
2013 YTD	39,745	68,628	228,655	12,851	102,697	452,576	86,849	137,616
2012 YTD	51,508	76,301	263,510	13,665	140,001	544,985	103,351	126,089
2013 YTD as % of 2012 YTD	77	90	87	94	73	83	84	109
Last 4 weeks as % of 2012	79	98	92	89	68	85	72	103
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	71	91	88	70	65	80	74	99
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							
	Jul-13	Jul-12	Aug-13	Aug-12	Sep-13	Sep-12	Oct-13	Oct-12
<b>7/11/2013</b>								
BNSF <sup>3</sup>								
COT grain units	0	0	no bids	0	0	4	no offer	no offer
COT grain single-car <sup>5</sup>	0	0..26	0..1	5..11	0	0..2	0..2	no offer
UP <sup>4</sup>								
GCAS/Region 1	no offer	no offer	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no offer	no offer	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.

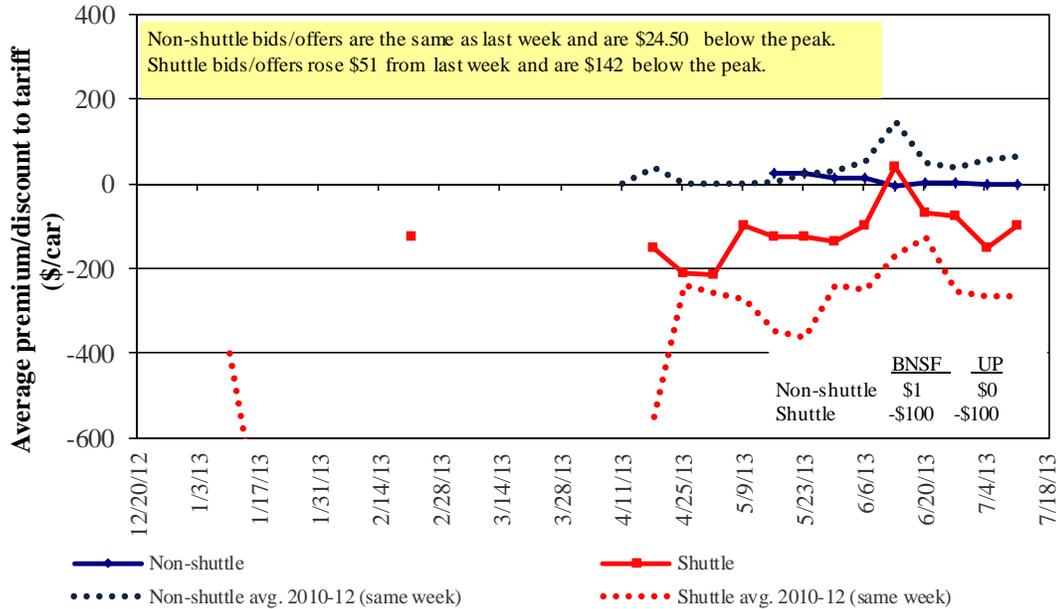
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 July 2013, Secondary Market**

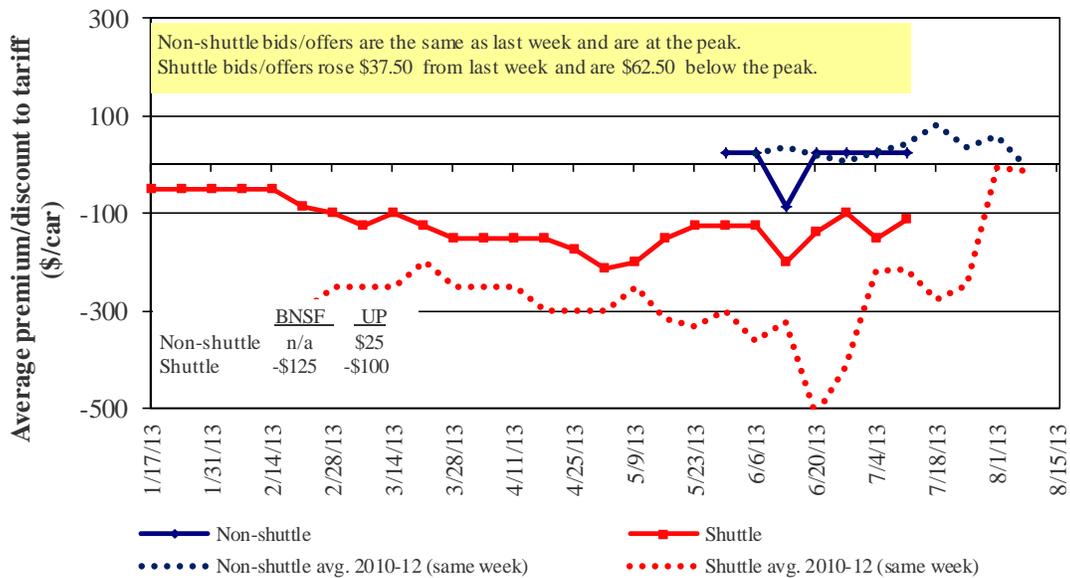


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

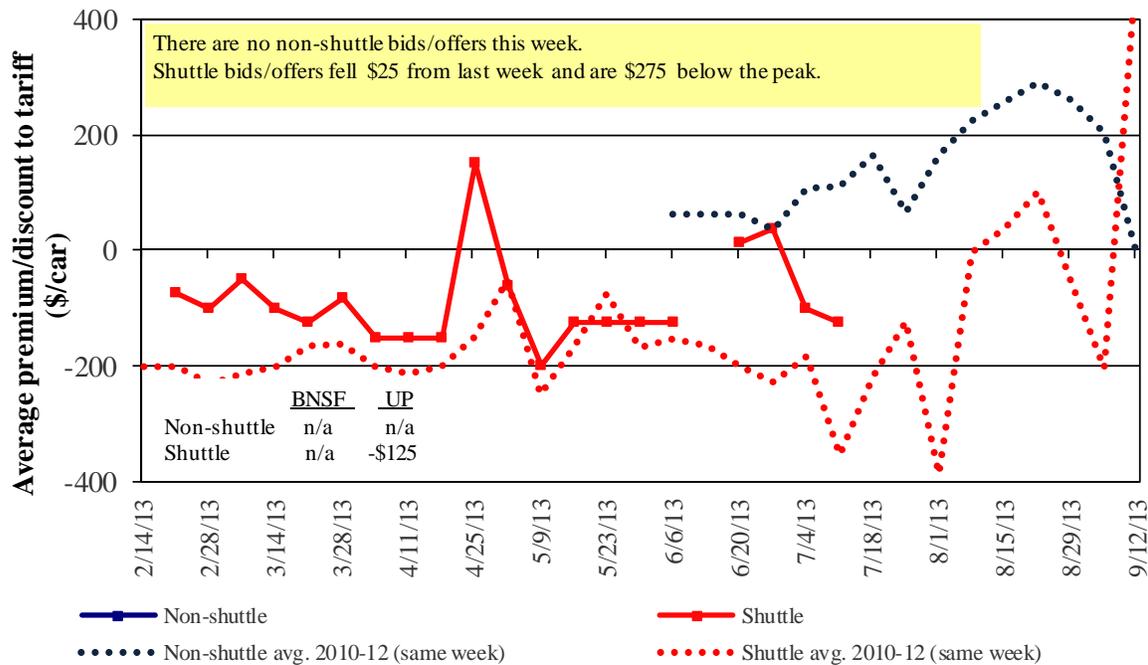


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in September 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					
	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13
<b>Non-shuttle</b>						
BNSF-GF	1	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	(24)	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	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 2012	-	10	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(100)	(125)	n/a	300	250	(200)
Change from last week	52	75	n/a	n/a	n/a	n/a
Change from same week 2012	13	217	n/a	n/a	n/a	n/a
UP-Pool	(100)	(100)	(125)	450	n/a	n/a
Change from last week	50	-	(25)	50	n/a	n/a
Change from same week 2012	250	300	200	325	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 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
7/1/2013	Origin region*	Destination region*	Tariff 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	\$3,191	\$182	\$33.50	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,543	\$104	\$36.22	\$0.99	8
	Wichita, KS	Los Angeles, CA	\$6,244	\$536	\$67.32	\$1.83	3
	Wichita, KS	New Orleans, LA	\$3,808	\$320	\$41.00	\$1.12	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$440	\$62.20	\$1.69	4
	Northwest KS	Galveston-Houston, TX	\$4,076	\$351	\$43.96	\$1.20	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$489	\$47.30	\$1.29	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$362	\$34.48	\$0.94	43
	Toledo, OH	Raleigh, NC	\$4,508	\$407	\$48.81	\$1.33	2
	Des Moines, IA	Davenport, IA	\$2,006	\$77	\$20.68	\$0.56	3
	Indianapolis, IN	Atlanta, GA	\$3,920	\$306	\$41.96	\$1.14	2
	Indianapolis, IN	Knoxville, TN	\$3,354	\$196	\$35.25	\$0.96	2
	Des Moines, IA	Little Rock, AR	\$3,146	\$225	\$33.48	\$0.91	2
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$656	\$56.82	\$1.55	1
	Minneapolis, MN	New Orleans, LA	\$3,319	\$395	\$36.88	\$1.00	1
	Toledo, OH	Huntsville, AL	\$3,575	\$289	\$38.37	\$1.04	2
	Indianapolis, IN	Raleigh, NC	\$4,578	\$410	\$49.53	\$1.35	2
	Indianapolis, IN	Huntsville, AL	\$3,267	\$196	\$34.39	\$0.94	2
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$362	\$39.34	\$1.07	5	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,580	\$308	\$38.61	\$1.05	6
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$240	\$40.10	\$1.09	4
	Chicago, IL	Albany, NY	\$3,771	\$382	\$41.24	\$1.12	3
	Grand Forks, ND	Portland, OR	\$5,061	\$532	\$55.54	\$1.51	4
	Grand Forks, ND	Galveston-Houston, TX	\$6,082	\$554	\$65.90	\$1.79	3
	Northwest KS	Portland, OR	\$5,043	\$576	\$55.80	\$1.52	2
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$648	\$54.10	\$1.47	-1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$593	\$53.16	\$1.45	-1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$362	\$32.68	\$0.89	2
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$346	\$36.30	\$0.99	-1
	Des Moines, IA	Amarillo, TX	\$3,510	\$283	\$37.67	\$1.03	2
	Minneapolis, MN	Tacoma, WA	\$4,800	\$643	\$54.05	\$1.47	-1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$665	\$48.31	\$1.31	-1
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$593	\$58.72	\$1.60	4
	Minneapolis, MN	Portland, OR	\$5,330	\$648	\$59.36	\$1.62	5
	Fargo, ND	Tacoma, WA	\$5,230	\$527	\$57.17	\$1.56	5
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$418	\$43.37	\$1.18	5
	Toledo, OH	Huntsville, AL	\$2,750	\$289	\$30.18	\$0.82	2
Grand Island, NE	Portland, OR	\$4,960	\$589	\$55.11	\$1.50	4	

<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, 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: 7/1/2013

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	\$563	\$69.73	\$1.90	-18
	OK	Cuautitlan, EM	\$6,715	\$684	\$75.60	\$2.06	-2
	KS	Guadalajara, JA	\$8,293	\$660	\$91.48	\$2.49	10
	TX	Salinas Victoria, NL	\$2,872	\$258	\$31.97	\$0.87	-22
Corn	IA	Guadalajara, JA	\$7,699	\$777	\$86.60	\$2.20	-1
	SD	Celaya, GJ <sup>5</sup>	\$7,356	\$736	\$82.69	\$2.10	n/a
	NE	Queretaro, QA	\$7,153	\$690	\$80.14	\$2.03	0
	SD	Salinas Victoria, NL	\$5,700	\$560	\$63.96	\$1.62	-1
	MO	Tlalnepantla, EM	\$6,592	\$670	\$74.20	\$1.88	0
	SD	Torreon, CU	\$6,522	\$617	\$72.94	\$1.85	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$655	\$84.14	\$2.29	2
	NE	Guadalajara, JA	\$8,134	\$749	\$90.77	\$2.47	2
	IA	El Castillo, JA	\$8,555	\$732	\$94.89	\$2.58	3
	KS	Torreon, CU	\$6,651	\$465	\$72.71	\$1.98	3
Sorghum	TX	Guadalajara, JA	\$6,464	\$479	\$70.94	\$1.80	-3
	NE	Celaya, GJ <sup>5</sup>	\$6,997	\$669	\$78.32	\$1.99	n/a
	KS	Queretaro, QA	\$6,815	\$420	\$73.92	\$1.88	5
	NE	Salinas Victoria, NL	\$5,438	\$492	\$60.58	\$1.54	5
	NE	Torreon, CU	\$6,153	\$549	\$68.48	\$1.74	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

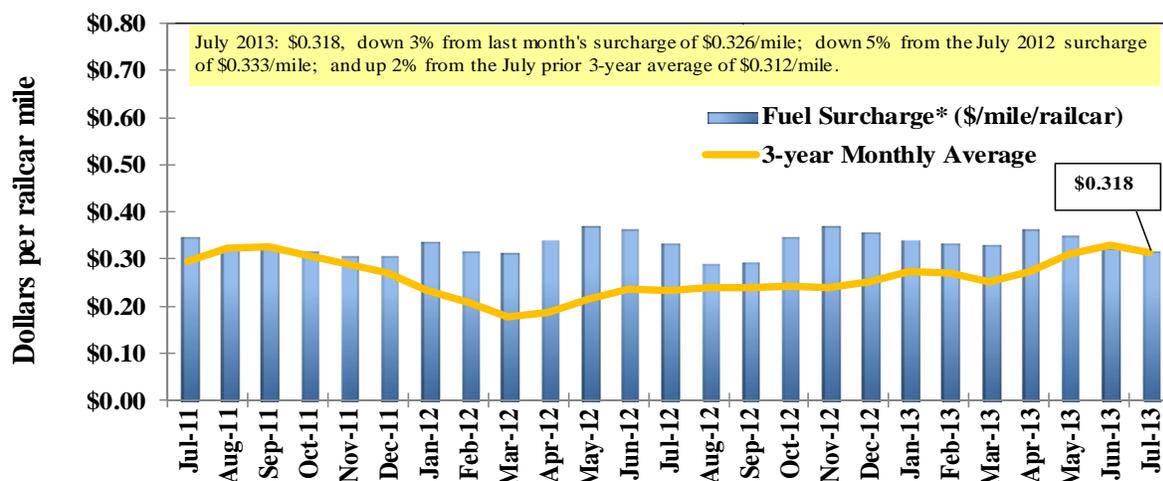
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

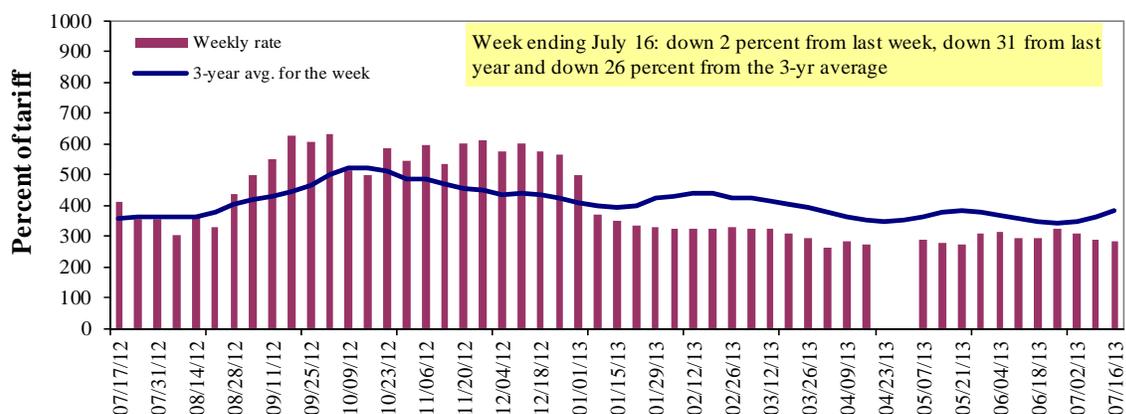
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

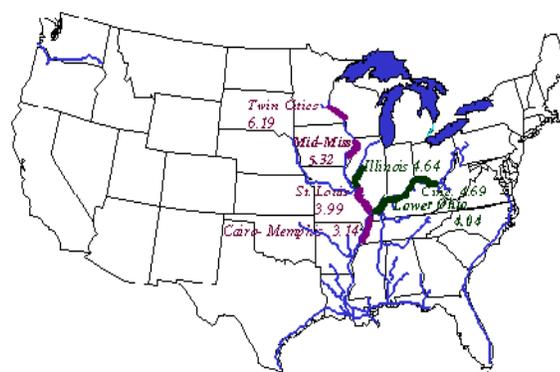
		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
<b>Rate<sup>1</sup></b>	7/16/2013	357	300	282	223	200	200	185
	7/9/2013	363	298	288	227	212	212	192
<b>\$/ton</b>	7/16/2013	22.10	15.96	13.08	8.90	9.38	8.08	5.81
	7/9/2013	22.47	15.85	13.36	9.06	9.94	8.56	6.03
<b>Current week % change from the same week:</b>								
	Last year	-30	-27	-31	-41	-43	-42	-41
	3-year avg. <sup>2</sup>	-27	-26	-26	-26	-39	-39	-30
<b>Rate<sup>1</sup></b>	August	388	325	308	275	313	313	275
	October	590	563	560	492	565	565	480

<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



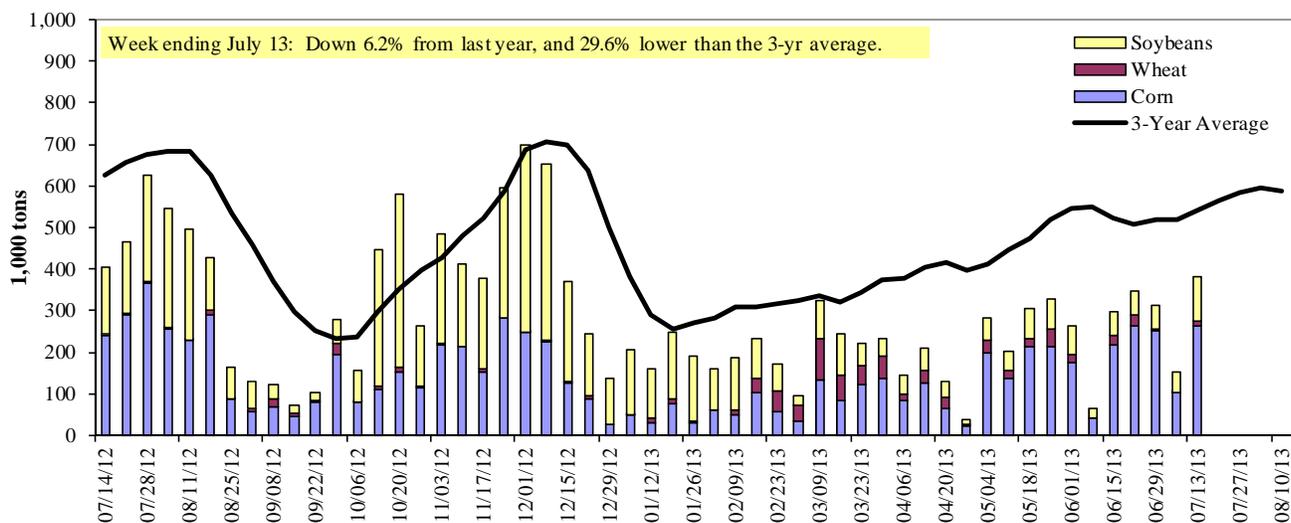
## Calculating barge rate per ton:

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

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

Table 10

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

Week ending 7/13/2013	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	57	3	27	0	87
Winfield, MO (L25)	198	17	61	2	278
Alton, IL (L26)	267	12	108	2	389
Granite City, IL (L27)	262	12	107	2	383
<b>Illinois River (L8)</b>	53	0	30	0	82
<b>Ohio River (L52)</b>	24	95	19	0	138
<b>Arkansas River (L1)</b>	0	88	1	0	90
Weekly total - 2013	286	196	127	2	610
Weekly total - 2012	277	33	201	14	525
2013 YTD <sup>1</sup>	4,545	2,235	4,094	118	10,993
2012 YTD	9,878	1,135	5,634	176	16,823
2013 as % of 2012 YTD	46	197	73	67	65
Last 4 weeks as % of 2012 <sup>2</sup>	87	57	43	4	85
<b>Total 2012</b>	<b>14,837</b>	<b>1,794</b>	<b>12,663</b>	<b>229</b>	<b>29,523</b>

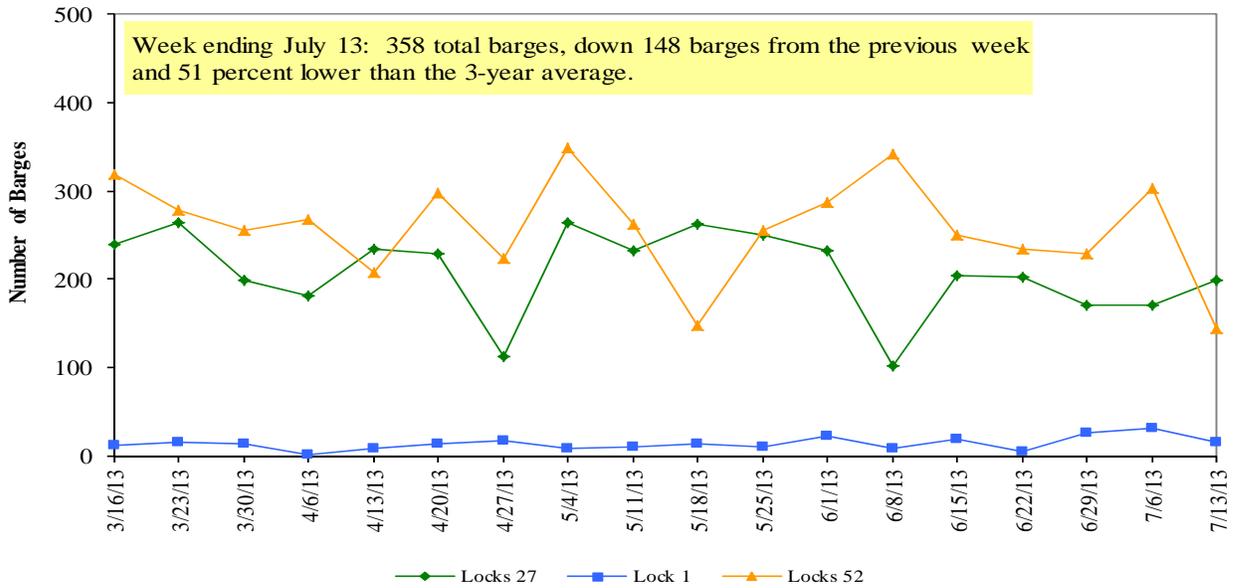
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

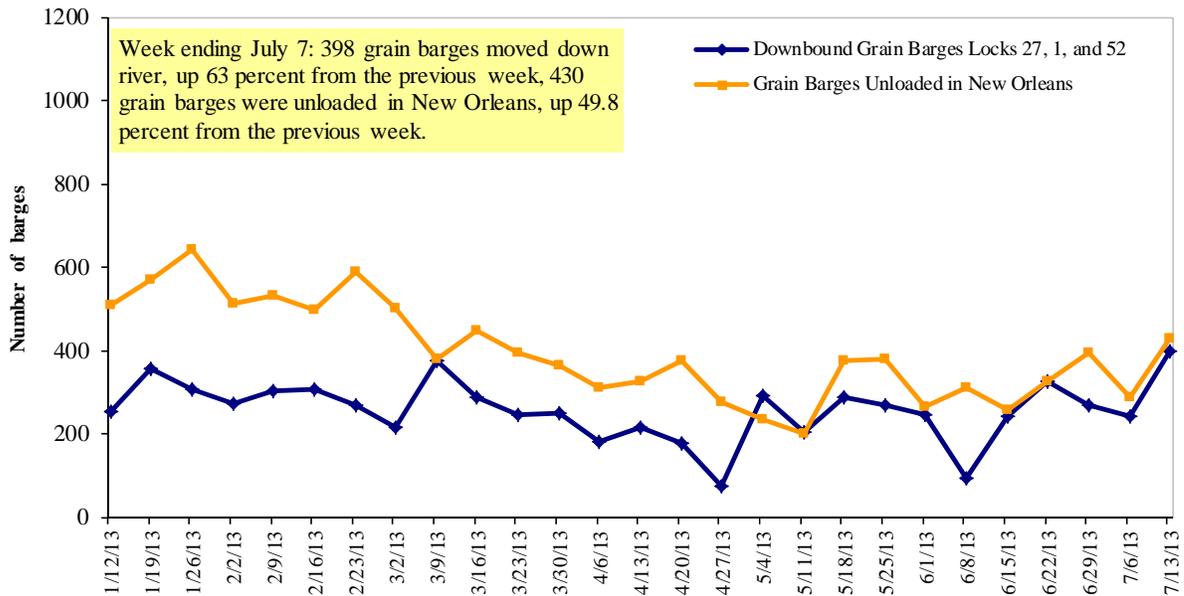
Source: U.S. Army Corps of Engineers

**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 7/15/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.876	0.045	0.135
	New England	4.005	0.040	0.157
	Central Atlantic	3.939	0.044	0.101
	Lower Atlantic	3.804	0.047	0.156
II	Midwest <sup>2</sup>	3.852	0.031	0.193
III	Gulf Coast <sup>3</sup>	3.798	0.045	0.181
IV	Rocky Mountain	3.829	0.018	0.157
V	West Coast	3.997	0.046	0.194
	West Coast less California	3.917	0.053	0.212
	California	4.065	0.039	0.179
Total	U.S.	3.867	0.039	0.172

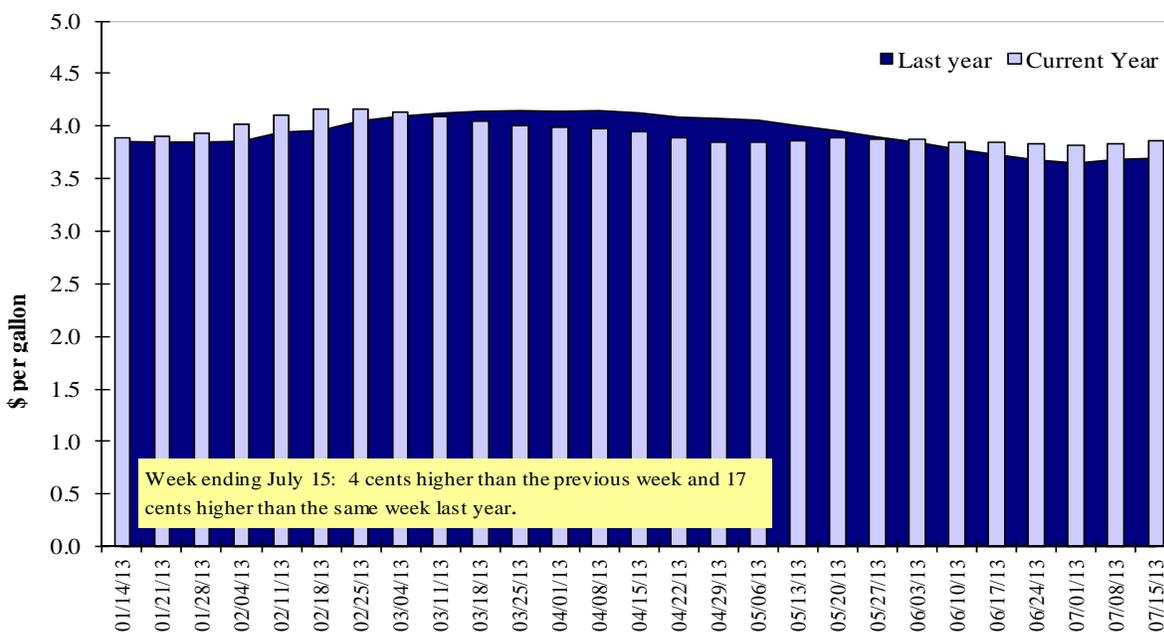
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
7/4/2013	2,035	3,367	1,308	968	83	7,760	3,238	1,260	12,258
This week year ago	1,417	806	1,287	1,066	127	4,703	5,309	4,951	14,963
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2012/13 YTD	1,173	1,024	455	205	20	2,877	15,322	35,513	53,712
2011/12 YTD	1,349	441	564	346	43	2,743	33,803	33,010	69,556
YTD 2012/13 as % of 2011/12	87	232	81	59	n/a	105	45	108	77
Last 4 wks as % of same period 2011/12	140	342	106	92	72	153	59	29	79
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 in effect for wheat

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 07/04/2013	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	856	6,881	11,628	(41)	12,367
Mexico	1,509	4,329	9,541	(55)	9,617
China	1,486	2,479	5,166	(52)	5,414
Korea	3	418	3,738	(89)	3,639
Venezuela	0	996	1,149	(13)	1,332
<b>Top 5 Importers</b>	<b>3,854</b>	<b>15,103</b>	<b>31,223</b>	<b>(52)</b>	<b>32,369</b>
<b>Total US corn export sales</b>	<b>5,883</b>	<b>18,560</b>	<b>39,112</b>	<b>(53)</b>	<b>39,180</b>
% of Projected	19%	104%	100%		
Change from prior week	<b>658</b>	<b>392</b>	<b>173</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	66%	81%	80%		83%
<b>USDA forecast, July 2013</b>	<b>31,750</b>	<b>17,780</b>	<b>39,180</b>	<b>(55)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol July 2013</b>	<b>124,460</b>	<b>118,110</b>	<b>127,280</b>	<b>(7)</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 07/04/2013	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	10,128	21,599	23,562	(8)	24,602
Mexico	277	2,518	3,154	(20)	3,180
Japan	138	1,768	1,798	(2)	1,891
Indonesia	29	1,583	1,518	4	1,741
Egypt	60	677	1,207	(44)	1,292
<b>Top 5 importers</b>	<b>10,631</b>	<b>28,145</b>	<b>31,239</b>	<b>(10)</b>	<b>32,706</b>
<b>Total US soybean export sales</b>	<b>12,712</b>	<b>36,772</b>	<b>37,961</b>	<b>(3)</b>	<b>37,060</b>
% of Projected	32%	102%	102%		
Change from prior week	411	(71)	332		
<b>Top 5 importers' share of U.S. soybean export sales</b>	84%	77%	82%		
<b>USDA forecast, July 2013</b>	<b>39,460</b>	<b>36,200</b>	<b>37,060</b>	<b>(2)</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, 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. (Carryover plus Accumulated Exports)

Table 15

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

Week Ending 07/04/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	714	860	(17)	3,544
Nigeria	622	590	5	3,002
Mexico	1,048	1,049	(0)	2,761
Philippines	475	631	(25)	1,965
Egypt	131	58	125	1,678
Korea	207	436	(53)	1,385
Taiwan	184	294	(37)	1,038
China	2,852	339	741	743
Venezuela	190	257	(26)	631
Colombia	239	154	56	600
<b>Top 10 importers</b>	<b>6,661</b>	<b>4,666</b>	<b>43</b>	<b>17,347</b>
<b>Total US wheat export sales</b>	<b>10,638</b>	<b>7,446</b>	<b>43</b>	<b>26,348</b>
% of Projected	36%	27%		
Change from prior week	1,473	312		
<b>Top 10 importers' share of U.S. wheat export sales</b>	63%	63%		66%
<b>USDA forecast, July 2013</b>	<b>29,260</b>	<b>27,490</b>	<b>6</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 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, 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.

Table 16

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

Port regions	Week ending 07/11/13	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	190	180	106	6,078	7,177	85	100	79	12,625
Corn	31	0	n/a	1,315	4,218	31	8	7	5,512
Soybeans	0	0	n/a	3,696	5,213	71	0	0	10,347
<b>Total</b>	<b>221</b>	<b>180</b>	<b>123</b>	<b>11,089</b>	<b>16,608</b>	<b>67</b>	<b>41</b>	<b>37</b>	<b>28,484</b>
<b>Mississippi Gulf</b>									
Wheat	170	303	56	4,859	3,504	139	252	247	5,462
Corn	344	159	216	5,990	11,277	53	65	46	18,068
Soybeans	90	26	353	7,366	9,878	75	46	77	24,684
<b>Total</b>	<b>604</b>	<b>488</b>	<b>124</b>	<b>18,215</b>	<b>24,658</b>	<b>74</b>	<b>86</b>	<b>79</b>	<b>48,215</b>
<b>Texas Gulf</b>									
Wheat	280	250	112	4,666	3,390	138	108	109	5,912
Corn	0	0	n/a	126	295	43	n/a	62	336
Soybeans	0	0	n/a	122	5	n/a	n/a	0	626
<b>Total</b>	<b>280</b>	<b>250</b>	<b>112</b>	<b>4,915</b>	<b>3,689</b>	<b>133</b>	<b>111</b>	<b>107</b>	<b>6,874</b>
<b>Interior</b>									
Wheat	17	27	65	532	701	76	18	139	1,218
Corn	40	50	80	1,412	4,453	32	130	37	6,115
Soybeans	8	23	36	1,709	2,373	72	46	45	4,204
<b>Total</b>	<b>65</b>	<b>99</b>	<b>66</b>	<b>3,652</b>	<b>7,527</b>	<b>49</b>	<b>111</b>	<b>49</b>	<b>11,538</b>
<b>Great Lakes</b>									
Wheat	0	22	0	434	164	265	42	38	481
Corn	0	0	n/a	0	37	0	n/a	0	56
Soybeans	0	0	n/a	22	125	18	0	0	713
<b>Total</b>	<b>0</b>	<b>22</b>	<b>0</b>	<b>456</b>	<b>327</b>	<b>140</b>	<b>31</b>	<b>28</b>	<b>1,250</b>
<b>Atlantic</b>									
Wheat	10	5	221	408	226	180	57	38	341
Corn	0	0	n/a	2	92	2	0	0	143
Soybeans	1	0	n/a	0	574	0	6	14	1,460
<b>Total</b>	<b>12</b>	<b>5</b>	<b>253</b>	<b>410</b>	<b>892</b>	<b>46</b>	<b>18</b>	<b>22</b>	<b>1,944</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	666	786	85	16,977	15,161	112	130	120	26,040
Corn	414	209	198	8,845	20,373	43	46	34	30,230
Soybeans	100	49	205	12,916	18,168	71	32	51	42,035
<b>Total</b>	<b>1,181</b>	<b>1,043</b>	<b>113</b>	<b>38,737</b>	<b>53,702</b>	<b>72</b>	<b>70</b>	<b>65</b>	<b>98,305</b>

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

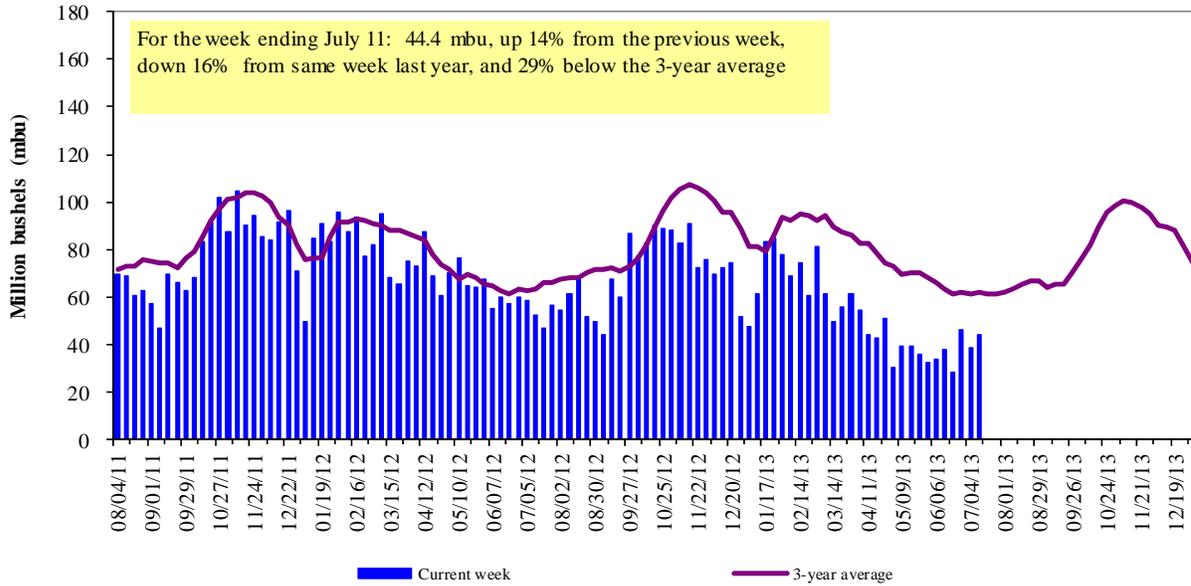
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

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

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

Figure 14

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

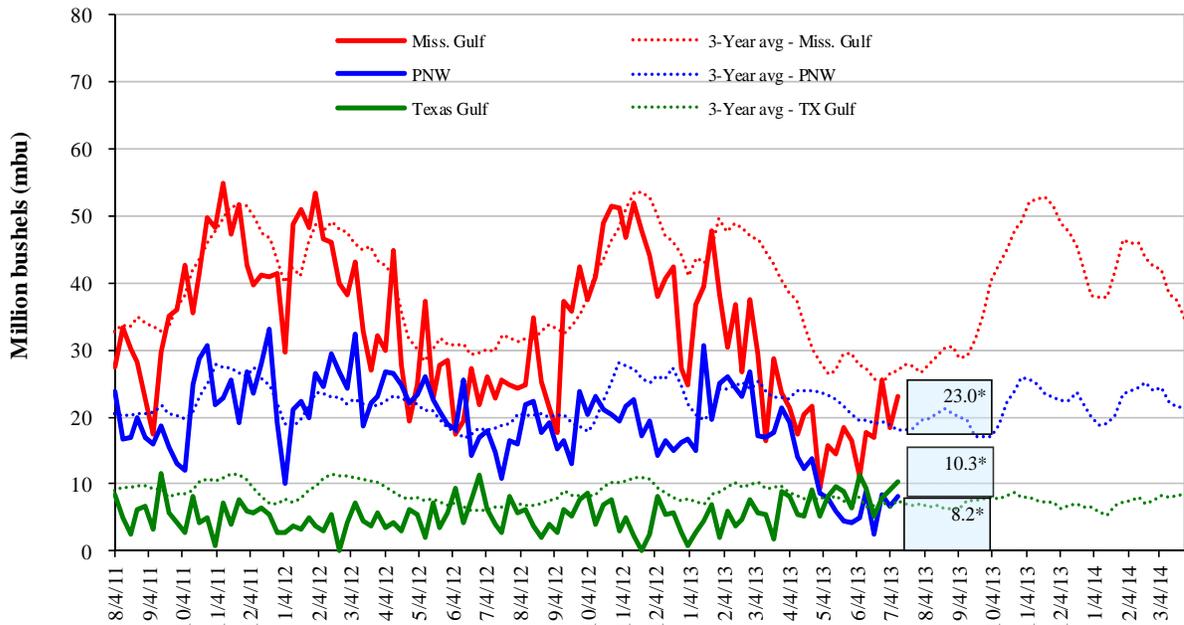


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

<u>July 11 % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	up 26	up 12	up 21	up 24
Last year (same week)	up 1	up 152	up 24	down 44
3-yr avg. (4-wk mov. avg.)	down 15	up 35	down 4	down 57

# Ocean Transportation

Table 17

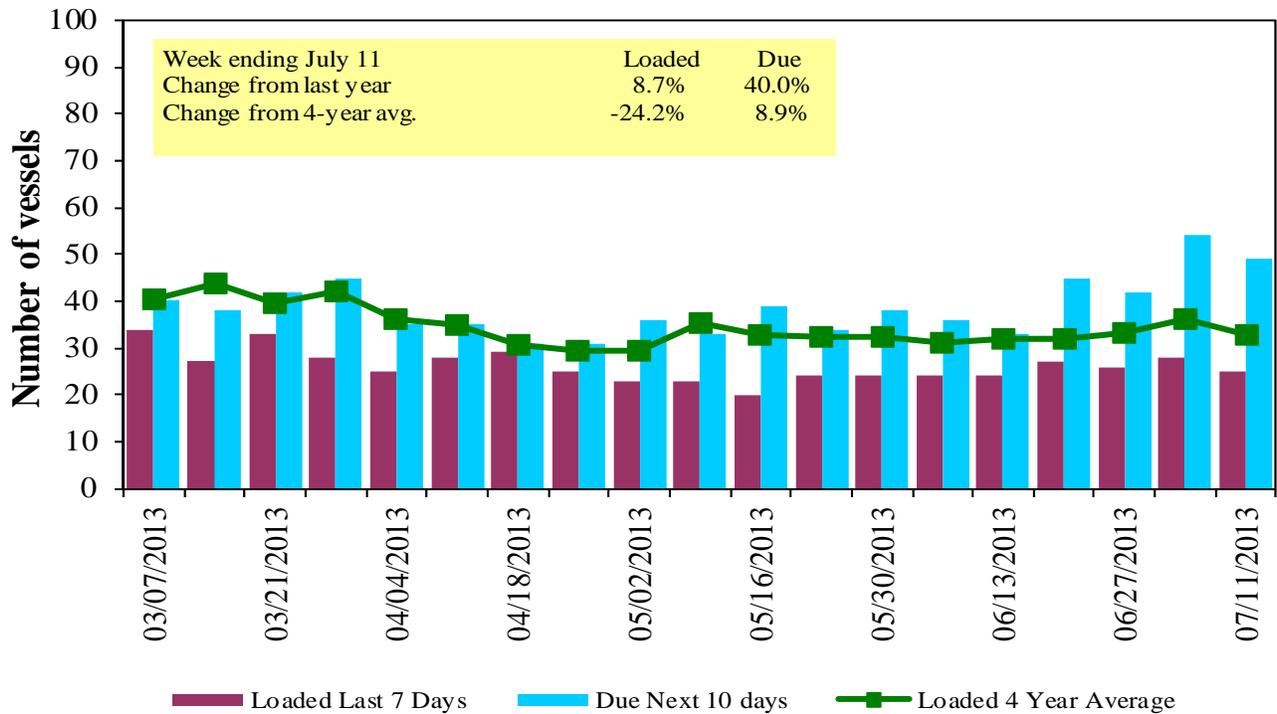
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
7/11/2013	26	25	49	7	n/a
7/4/2013	17	28	54	7	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>1</sup> Vessel Loading Activity**

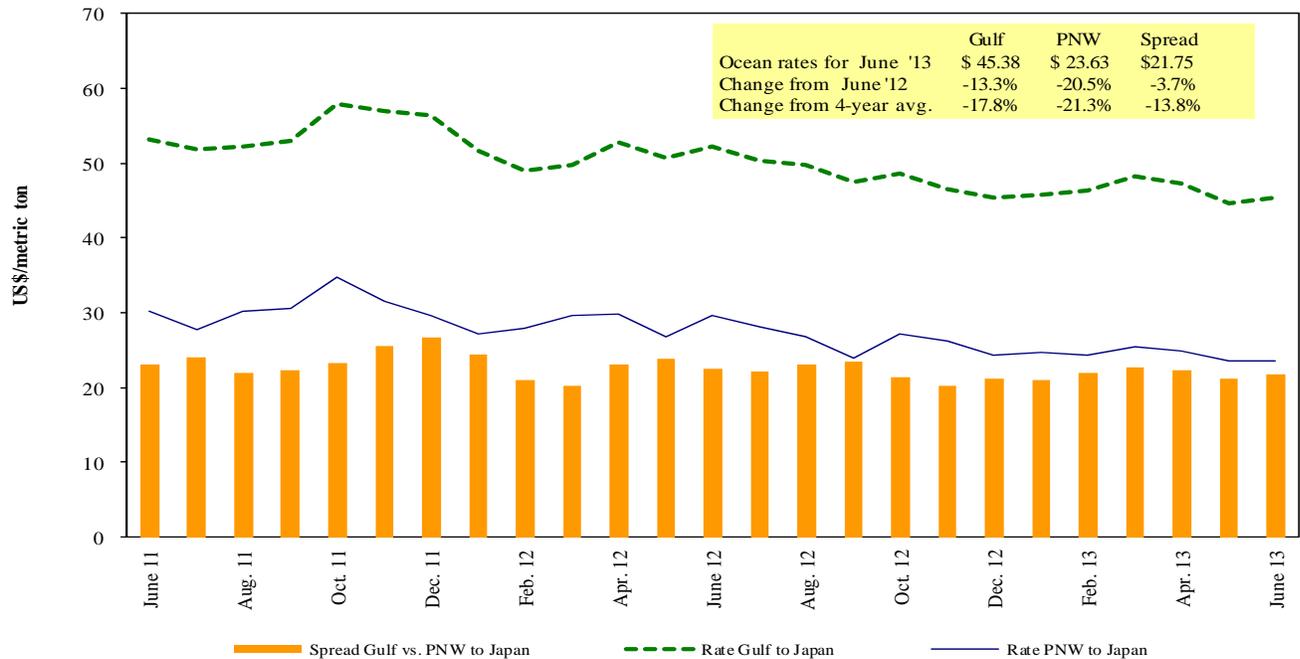


Source: Transportation & Marketing Programs/AMS/USDA

<sup>1</sup>U.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 07/13/2013**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jul 10/20	55,000	42.00
U.S. Gulf	China	Heavy Grain	Oct 1/Dec 31	55,000	33.00
U.S. Gulf	China	Heavy Grain	Jun 1/3	55,000	41.00
PNW	Bangladesh <sup>1</sup>	Wheat	Jun 10/20	4,610	98.00
Brazil	China	Heavy Grain	Jul 20/30	60,000	34.50
Brazil	China	Heavy Grain	Jul 1/10	60,000	34.00
Brazil	China	Heavy Grain	Jun 25/Jul 5	60,000	32.50
Brazil	China	Heavy Grain	June 25/30	60,000	32.50
Brazil	China	Heavy Grain	Jul 1/30	65,000	36.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	37.00
Brazil	Portugal	Corn	Jul 12/29	60,000	21.50
France	Algeria	Wheat	Apr 15/25	30,000	18.75
River Plate	China	Heavy Grain	Aug 1/10	60,000	39.50
River Plate	Egypt	Heavy Grain	Jul 1/10	50,000	33.00
Ukraine	Iran	Wheat	Jun 10/18	60,000	32.50

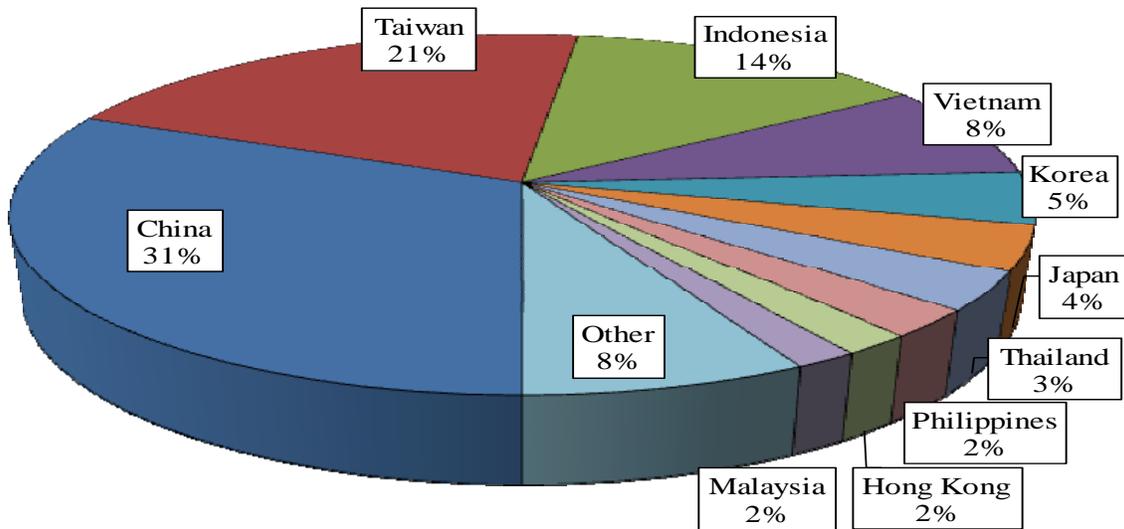
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

<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.

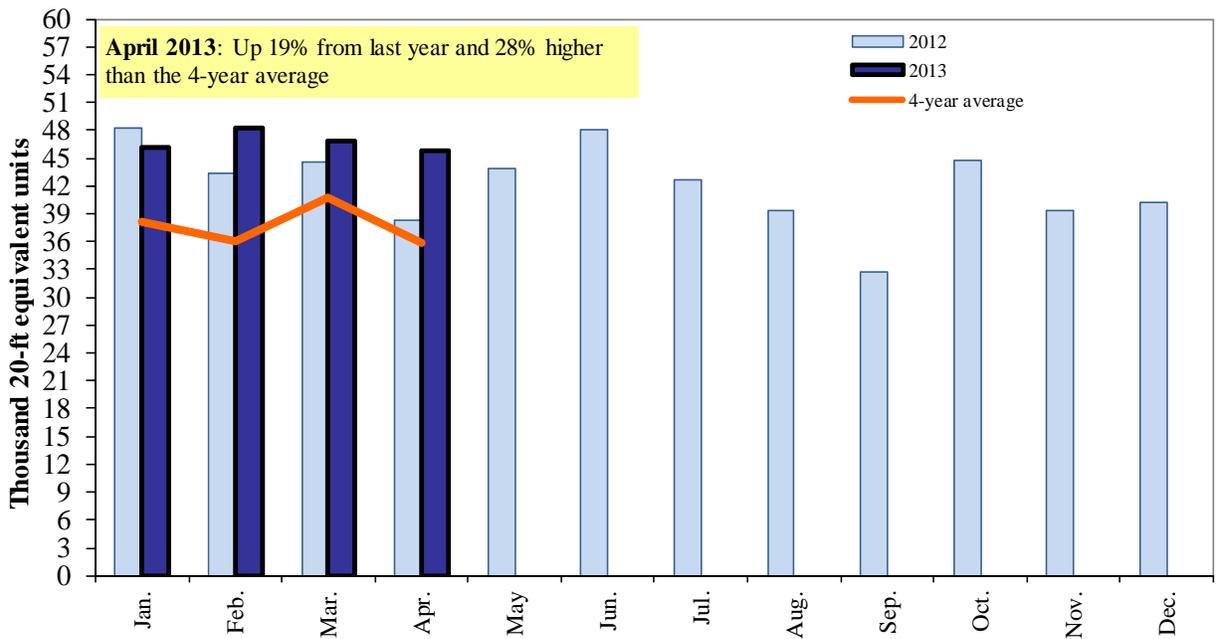
**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, April 2013**



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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Preferred citation: U.S. Dept. of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. July 18, 2013. Web: <http://dx.doi.org/10.9752/TS056.07-18-2013>

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