



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

Dry Bulk New buildings Surge; Shippers Benefit in the Short Term

Despite relatively low ocean freight rates, vessel owners continue to place orders for new dry bulk vessels. According to an article published August 7 on World-Grain.com, Michael King indicated that 106 vessels, amounting to 10.6 million deadweight tons (mdwt), were ordered during the first quarter of 2013. About 14.8 mdwt worth of new building contracts were awarded during the first 4 months, up 40 percent from a year earlier. Owners are taking advantage of historically low shipbuilding prices and also buying more fuel-efficient vessels to minimize operation costs, given the currently high bunker fuel prices. The additional capacity to the existing vessel fleet may be beneficial for grain shippers by keeping bulk freight rates relatively low, at least until the demand for vessel capacity catches up with supply. Most of the current new buildings are scheduled for delivery in 2015 or 2016.

Panama Canal Scheduled Lock Maintenance

On August 20 and 22, the west lane of Gatun Lock will be closed for maintenance for 10 hours each day. During the scheduled maintenance, the estimated transit capacity for the lock is 31-33 vessels per day. The normal transit capacity of the Panama Canal is 38-40 per day, depending on vessel mix and other factors. For vessels wishing to avoid delays, the Transit Reservation System is available for booking in accordance with the governing rules.

South Dakota Petitions STB Regarding Canadian Pacific Lines

On August 8, South Dakota petitioned the Surface Transportation Board (STB) to enforce the investment representations made by Canadian Pacific Railway (CP) in its 2007 application to purchase the Dakota, Minnesota & Eastern Railroad (DM&E). At the time, CP had represented that it would invest \$300 million to upgrade the DM&E line in the first few years following the acquisition. The DM&E line is critically important to South Dakota rail shippers because it is the only east-west rail line traversing the State.

Soybean Gulf Basis Increase, Indicate Rising Soybeans Movement to the Gulf

Since July 26, soybean basis levels in the Gulf have been averaging almost \$1.80 per bushel over the near-term futures, almost doubling the 97-cents-per-average-basis levels during most of July, according to the AMS Livestock and Grain Market News Portal daily basis report. The basis levels in central Illinois and along the Mississippi River in Northern Iowa began increasing in the first week of August, probably in response to the strong price signal from the Gulf. Transportation patterns can change based on relative prices in various locations. For example, for a brief period in early July, the basis in Iowa and Illinois surged above those at the Gulf, indicating transportation demand for moving soybeans for export to the Gulf was lower than for the local movements within Iowa and Illinois. Part of the increase in the Gulf basis can be explained by rising **barge rates**, which have been increasing over the past 2 weeks.

Snapshots by Sector

Rail

U.S. railroads originated 15,851 **carloads of grain** during the week ending August 3, down 8 percent from last week, 11 percent from last year, and 21 percent from the 3-year average.

During the week ending August 8, average August non-shuttle **secondary railcar bids/offers per car** were at tariff, unchanged from last week and \$29.50 higher than last year. Average shuttle bids/offers were \$60.50 below tariff, up \$1.50 from last week and \$289.50 higher than last year.

Barge

During the week ending August 10, **barge grain movements** totaled 427,550 tons, 12 percent higher than the previous week but 30.7 percent lower than the same period last year.

During the week ending August 10, 284 grain barges **moved down river**, up 16 percent from last week; 376 grain barges were **unloaded in New Orleans**, same as the previous week.

Ocean

During the week ending August 8, 28 **ocean-going grain vessels** were loaded in the Gulf, unchanged from the same period last year. Thirty-nine vessels are expected to be loaded within the next 10 days, down 15 percent from the same period last year.

During the week ending August 9, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$45.50 per mt, 2 percent less than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$24 per mt, 3 percent less than the previous week.

Fuel

During the week ending August 12, U.S. average **diesel fuel prices** were down 1 cent from the previous week at \$3.90 per gallon—7 cents lower than the same week last year.

Feature Article/Calendar

Soybean Transportation Costs Mixed; U.S. Farm Prices Up, Brazil Prices Down

The transportation costs of shipping soybeans from the United States and Brazil to Europe and China were mixed during the first quarter of 2013. The total transportation cost of shipping soybeans from Minneapolis, MN, and Davenport, IA, to Hamburg, Germany, through the U.S. Gulf increased by 12 and 11 percent quarter to quarter, respectively (table 1). The costs of transporting soybeans from the same locations to Shanghai, China, increased by 8 and 7 percent, respectively, from the previous quarter (table 2). However, transportation costs from Fargo, ND, and Sioux Falls, SD, to Shanghai decreased by 1 percent. Quarter-to-quarter costs for shipping soybeans to Hamburg and Shanghai increased from all Brazilian locations except between South Goiás (GO) and Paranaguá.

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

	2012	2012	2013	Percent change		2012	2012	2013	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										
	--\$/mt--									
Truck	9.14	10.86	10.98	20.13	1.10	9.14	10.86	10.98	20.13	1.10
Barge	12.53	41.08	11.92	-4.87	-70.98	12.53	33.95	11.92	-4.87	-64.89
Ocean ¹	19.91	18.68	19.57	-1.71	4.76	19.91	18.68	19.57	-1.71	4.76
Rail	31.61	-	36.48	15.41	-	24.16	-	27.93	15.60	-
Total transportation ²	73.19	70.62	78.95	7.87	11.80	65.74	63.49	70.40	7.09	10.88
Farm Value ³	447.05	518.09	526.66	17.81	1.65	448.27	522.99	530.33	18.31	1.40
Landed Cost	520.24	588.71	605.61	16.41	2.87	514.01	586.48	600.73	16.87	2.43
Transport % of landed cost	14.07	12.00	13.04			12.79	10.83	11.72		
Brazil										
North MT⁴ - Santos⁵										
	--\$/mt--									
Truck	117.52	109.80	124.03	5.54	12.96	55.14	53.11	56.16	1.85	5.74
Ocean ⁶	32.00	28.00	30.00	-6.25	7.14	31.58	34.30	30.00	-5.00	-12.54
Total transportation ²	149.52	137.80	154.03	3.02	11.78	86.72	87.41	86.16	-0.65	-1.43
Farm Value ⁷	377.70	536.60	419.35	11.03	-21.85	401.58	557.54	445.56	10.95	-20.08
Landed Cost	527.22	674.40	573.38	8.76	-14.98	488.30	644.95	531.72	8.89	-17.56
Transport % of landed cost	28.36	20.43	26.86			17.76	13.55	16.20		
South GO⁴ - Paranaguá⁵										
	--\$/mt--									
Truck	117.52	109.80	124.03	5.54	12.96	55.14	53.11	56.16	1.85	5.74
Ocean ⁶	32.00	28.00	30.00	-6.25	7.14	31.58	34.30	30.00	-5.00	-12.54
Total transportation ²	149.52	137.80	154.03	3.02	11.78	86.72	87.41	86.16	-0.65	-1.43
Farm Value ⁷	377.70	536.60	419.35	11.03	-21.85	401.58	557.54	445.56	10.95	-20.08
Landed Cost	527.22	674.40	573.38	8.76	-14.98	488.30	644.95	531.72	8.89	-17.56
Transport % of landed cost	28.36	20.43	26.86			17.76	13.55	16.20		

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

The cost of shipping soybeans through the Gulf was raised by slight increases in truck and ocean rates and an additional rail component in the cost. Usually, during the first quarter, grain is railed from Minneapolis and Davenport to the St. Louis area while the upper Mississippi River is closed for winter. The grain is then loaded onto barges bound for New Orleans, where it is transported by ocean-going vessels to foreign destinations. However, the costs of shipping via the Pacific Northwest to China declined because of decreases in tariff rail rates and ocean freight rates.

Trucking rates in Brazil increased during the quarter. Ocean freight rates from Santos and Paranaguá to Shanghai and Santos to Hamburg were up from the previous quarter.

Farm prices generally increased in the United States during the first quarter, causing the transportation share of the landed cost to be relatively modest compared to Brazil. The transportation share of the landed cost ranged from 12 to 16 percent in the United States and 16 to 30 percent in Brazil.

Market Outlook: According to USDA's Foreign Agricultural Service, Chinese soybean production for marketing year (MY) 12/13 is estimated at 12.5 million metric tons (mmt) ([USDA, FAS GAIN Report #: CH12065](#)). This production level represents a 5-year low as farmers in the Northeast provinces

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

	United States (via U.S. Gulf)					Brazil				
	2012 1 st qtr.	2012 4 th qtr.	2013 1 st qtr.	Percent change Yr. to Yr. Qtr. to Qtr.		2012 1 st qtr.	2012 4 th qtr.	2013 1 st qtr.	Percent change Yr. to Yr. Qtr. to Qtr.	
	United States (via U.S. Gulf)									
	Minneapolis, MN					Davenport, IA				
	--\$/mt--					--\$/mt--				
Truck	9.14	10.86	10.98	20.13	1.10	9.14	10.86	10.98	20.13	1.10
Barge	12.53	41.08	11.92	-4.87	-70.98	12.53	33.95	11.92	-4.87	-64.89
Ocean ¹	48.33	43.69	43.73	-9.52	0.09	48.33	43.69	43.73	-9.52	0.09
Rail	31.61	-	36.48	15.41	-	24.16	-	27.93	15.60	-
Total transportation ²	101.61	95.63	103.11	1.48	7.82	94.16	88.50	94.56	0.42	6.85
Farm Value ³	447.05	518.09	526.66	17.81	1.65	448.27	522.99	530.33	18.31	1.40
Landed Cost	548.66	613.72	629.77	14.78	2.62	542.43	611.49	624.89	15.20	2.19
Transport % of landed cost	18.52	15.58	16.37			17.36	14.47	15.13		
	Via PNW									
	Fargo, ND					Sioux Falls, SD				
	--\$/mt--					--\$/mt--				
Truck	9.14	10.86	10.98	20.13	1.10	9.14	10.86	10.98	20.13	1.10
Ocean ¹	26.54	23.58	23.08	-13.04	-2.12	26.54	23.58	23.08	-13.04	-2.12
Rail	54.25	57.87	57.47	5.94	-0.69	56.00	59.64	59.06	5.46	-0.97
Total transportation ²	89.93	92.31	91.53	1.78	-0.84	91.68	94.08	93.12	1.57	-1.02
Farm Value ³	434.80	515.64	530.19	21.94	2.82	445.82	516.86	522.99	17.31	1.19
Landed Cost	524.73	607.95	621.72	18.48	2.26	537.50	610.94	616.11	14.63	0.85
Transport % of landed cost	17.14	15.18	14.72			17.06	15.40	15.11		
	Brazil									
	North MT⁴ - Santos⁵					South GO⁴ - Paranagua⁵				
	--\$/mt--					--\$/mt--				
Truck	117.52	109.80	124.03	5.54	12.96	55.14	53.11	56.16	1.85	5.74
Ocean ⁶	46.62	50.42	52.34	12.27	3.81	52.32	55.42	56.03	7.09	1.10
Total transportation ²	164.14	160.22	176.37	7.45	10.08	107.46	108.53	112.19	4.40	3.37
Farm Value ⁷	377.70	536.60	419.35	11.03	-21.85	401.58	557.54	445.56	10.95	-20.08
Landed Cost	541.84	696.82	595.72	9.94	-14.51	509.04	666.07	557.75	9.57	-16.26
Transport % of landed cost	30.29	22.99	29.61			21.11	16.29	20.11		

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

substituted other profitable crops such as corn and rice for soybean production. Improved weather conditions during the growing season boosted yields, but not enough to offset the decline in area planted, causing overall production to decline. China imported about 6.43 mmt of U.S. soybeans during the first quarter, with a total value of \$3.8 million. Although the quantity imported is lower than the same period last year, Chinese soybean imports for MY 12/13 are forecast to be strong, at 61 mmt. The strong import demand is fueled by a consistent increase in consumer demand for animal meat products. Soybeans also provide a good protein base for feeding an increasing animal production inventory.

Similarly, soybean exports to Europe continued to be strong. The United States exported just over a million metric tons of soybeans to Europe during the first quarter—a little more than twice the amount exported during the same period last year. It is important for U.S. transportation costs to remain moderate to sustain strong demand for U.S. soybeans overseas. For more on Brazil soybean transportation, see [Soybean Transportation Guide: Brazil 2012](#). surajudeen.olowolayemo@ams.usda.gov

Grain Transportation Indicators

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
08/14/13	261	234	205	196	203	170
08/07/13	262	234	205	158	208	176

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

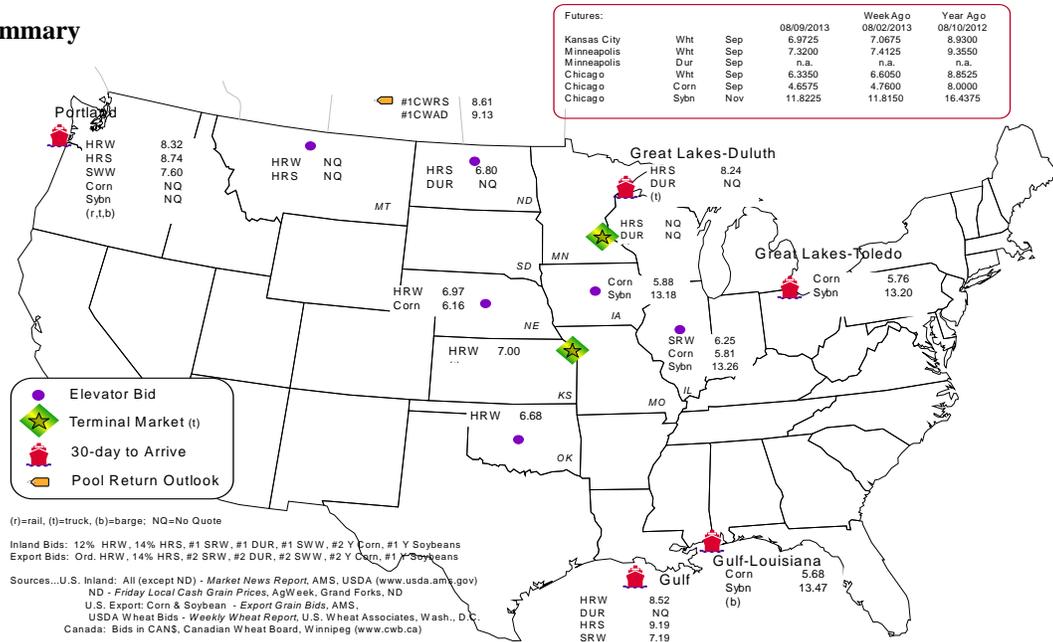
Commodity	Origin--Destination	8/9/2013	8/2/2013
Corn	IL--Gulf	0.13	0.13
Corn	NE--Gulf	0.48	0.14
Soybean	IA--Gulf	-0.29	-0.41
HRW	KS--Gulf	-1.52	-1.49
HRS	ND--Portland	-1.94	-1.84

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

Week ending	Mississippi		Pacific	Atlantic &		Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf				
08/07/2013 ^p	0	1,446	991	32		2,469	08/03/13	1,514
07/31/2013 ^r	1	1,656	1,222	43		2,922	07/27/13	1,037
2013 YTD ^r	9,872	39,817	76,971	9,978		136,638	2013 YTD	37,974
2012 YTD ^r	6,007	23,823	125,302	11,176		166,308	2012 YTD	63,244
2013 YTD as % of 2012 YTD	164	167	61	89		82	% change YTD	60
Last 4 weeks as % of 2012 ²	13	220	30	96		59	Last 4wks % 2012	99
Last 4 weeks as % of 4-year avg. ²	24	159	27	65		53	Last 4wks % 4 yr	89
Total 2012	22,604	40,780	199,419	34,637		287,462	Total 2012	92,008
Total 2011	27,358	77,515	191,187	24,088		320,148	Total 2011	97,118

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2012 and prior 4-year average.

³ 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.

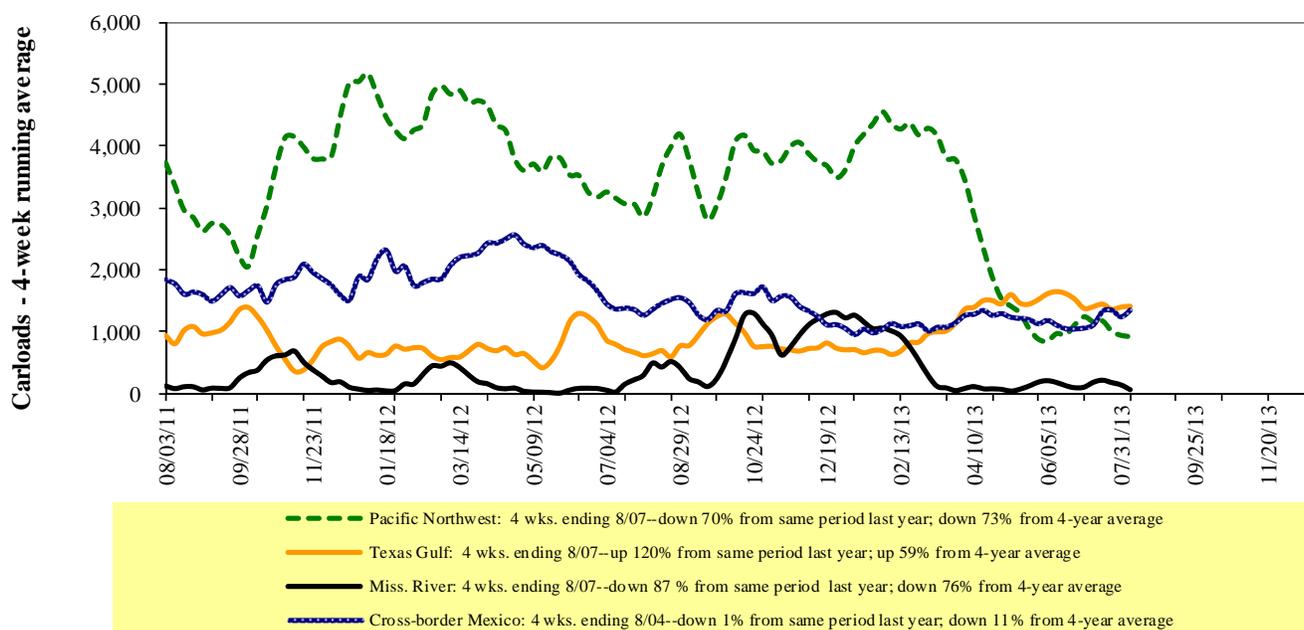
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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

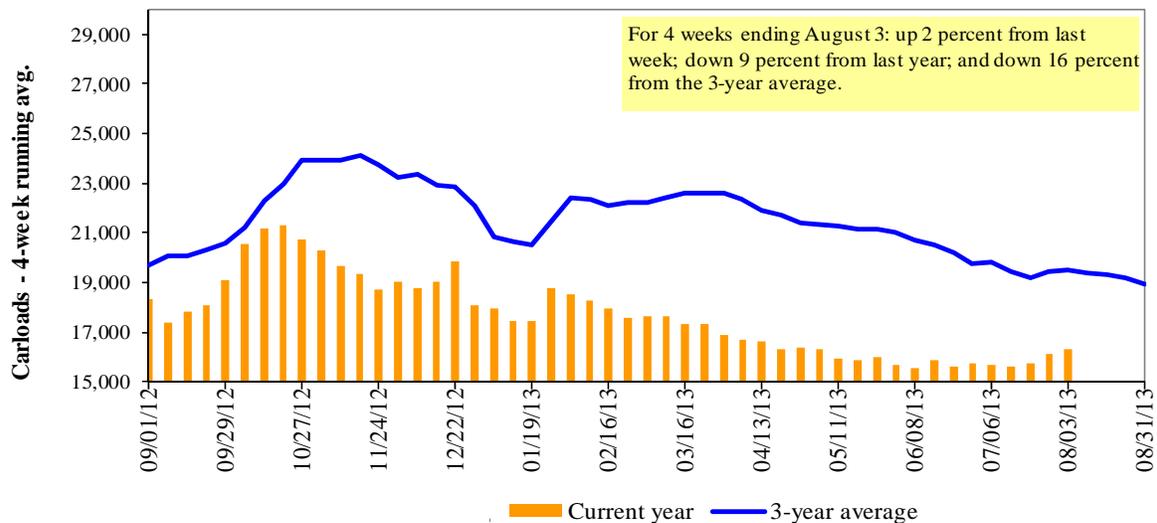
Table 4

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
08/03/13	1,271	2,179	8,702	465	3,234	15,851	2,776	4,584
This week last year	842	2,938	9,454	717	3,816	17,767	3,834	5,383
2013 YTD	44,922	78,098	262,795	14,606	117,497	517,918	97,942	159,346
2012 YTD	56,233	88,041	297,784	15,706	159,373	617,137	119,148	145,745
2013 YTD as % of 2012 YTD	80	89	88	93	74	84	82	109
Last 4 weeks as % of 2012	110	81	100	86	76	91	70	111
Last 4 weeks as % of 3-yr avg. ¹	83	83	92	84	72	84	75	101
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

¹As a percent of the same period in 2009 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Aug-13	Aug-12	Sep-13	Sep-12	Oct-13	Oct-12	Nov-13	Nov-12
BNSF³								
COT grain units	5	0	0	1	9	0	no offer	no offer
COT grain single-car ⁵	0	no bids	0	no bids	0 . . 1	0 . . 10	no offer	no offer
UP⁴								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	1	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	1	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.

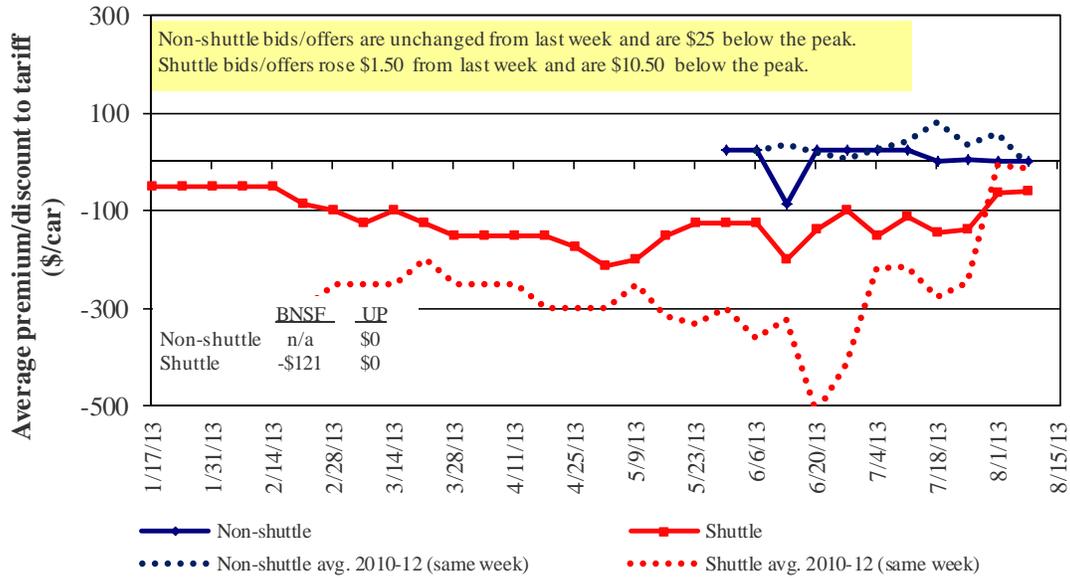
⁵Range is shown because average is not available. Not available = n/a.

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 August 2013, Secondary Market

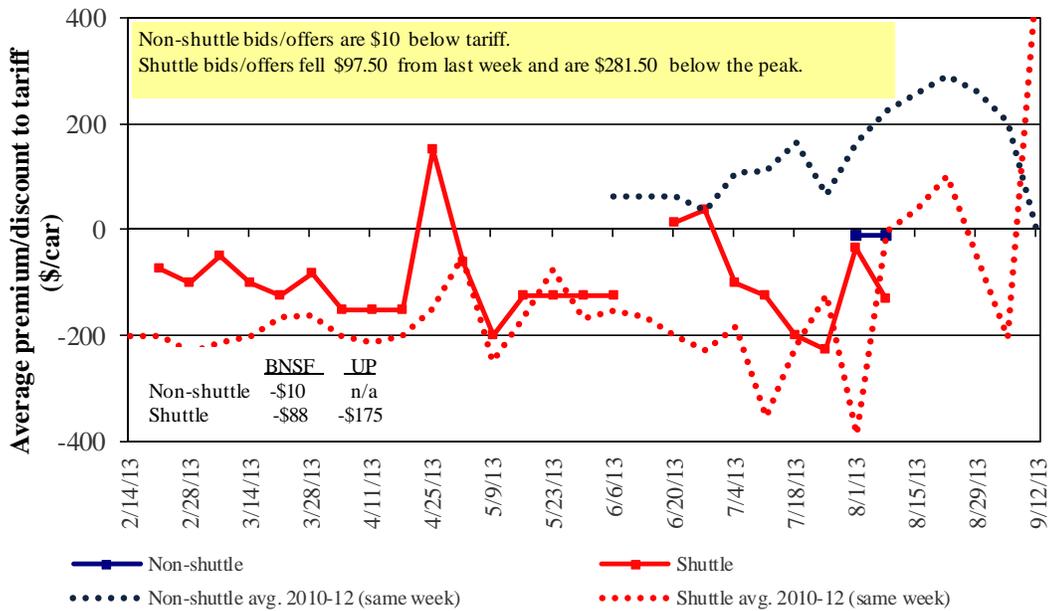


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

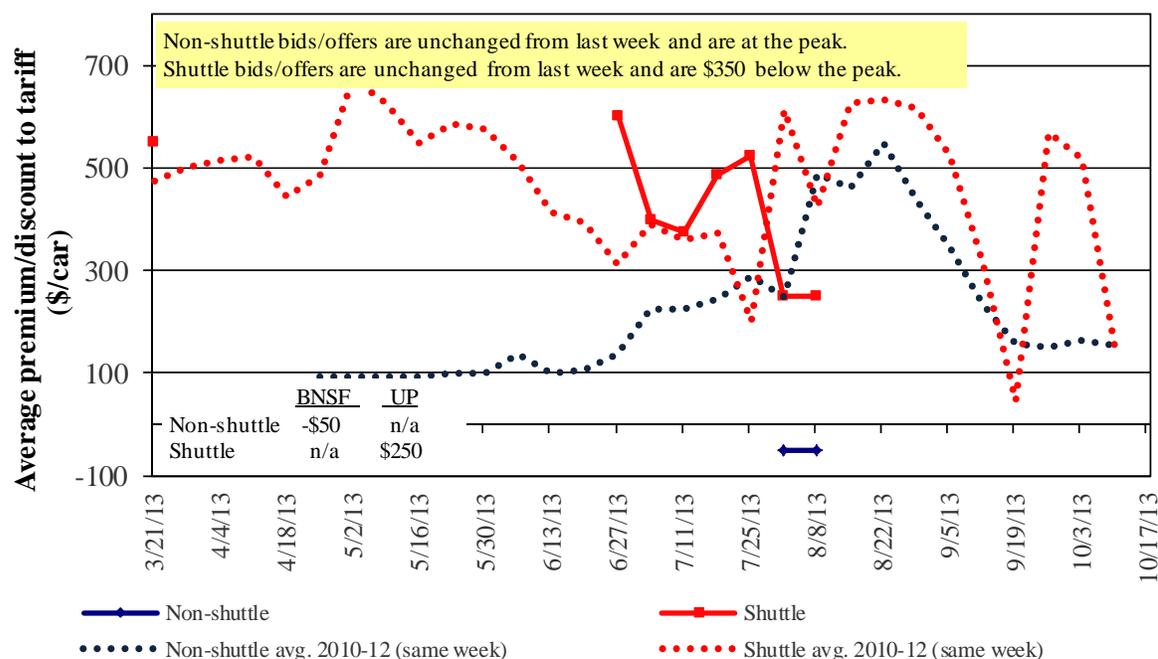


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

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



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

Weekly Secondary Railcar Market (\$/car)¹

Week ending	Delivery period					
	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14
Non-shuttle						
BNSF-GF	n/a	(10)	(50)	n/a	n/a	n/a
Change from last week	n/a	-	-	n/a	n/a	n/a
Change from same week 2012	n/a	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
Change from same week 2012	50	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(121)	(88)	n/a	n/a	n/a	n/a
Change from last week	(72)	(126)	n/a	n/a	n/a	n/a
Change from same week 2012	279	245	n/a	n/a	n/a	n/a
UP-Pool	-	(175)	250	n/a	n/a	n/a
Change from last week	75	(69)	-	n/a	n/a	n/a
Change from same week 2012	300	92	(100)	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 James B. Joiner Co., Tradewest Brokerage Co.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
8/1/2013	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$177	\$33.45	\$0.91	2
	Grand Forks, ND	Duluth-Superior, MN	\$3,707	\$101	\$37.82	\$1.03	8
	Wichita, KS	Los Angeles, CA	\$6,244	\$520	\$67.17	\$1.83	4
	Wichita, KS	New Orleans, LA	\$3,808	\$312	\$40.91	\$1.11	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$427	\$62.08	\$1.69	5
	Northwest KS	Galveston-Houston, TX	\$4,076	\$341	\$43.87	\$1.19	4
	Amarillo, TX	Los Angeles, CA	\$4,275	\$475	\$47.17	\$1.28	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$352	\$34.38	\$0.87	2
	Toledo, OH	Raleigh, NC	\$4,508	\$407	\$48.81	\$1.24	3
	Des Moines, IA	Davenport, IA	\$2,006	\$75	\$20.66	\$0.52	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$306	\$41.96	\$1.07	3
	Indianapolis, IN	Knoxville, TN	\$3,354	\$196	\$35.25	\$0.90	3
	Des Moines, IA	Little Rock, AR	\$3,146	\$219	\$33.42	\$0.85	2
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$638	\$56.63	\$1.44	2
	Minneapolis, MN	New Orleans, LA	\$3,399	\$387	\$37.60	\$1.02	8
	Toledo, OH	Huntsville, AL	\$3,575	\$289	\$38.37	\$1.04	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$410	\$49.53	\$1.35	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$196	\$34.39	\$0.94	3
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$352	\$39.24	\$1.07	6	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$299	\$39.50	\$1.07	6
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$233	\$40.03	\$1.09	5
	Chicago, IL	Albany, NY	\$3,771	\$382	\$41.24	\$1.12	4
	Grand Forks, ND	Portland, OR	\$5,159	\$517	\$56.36	\$1.53	4
	Grand Forks, ND	Galveston-Houston, TX	\$6,181	\$538	\$66.73	\$1.82	4
	Northwest KS	Portland, OR	\$5,043	\$560	\$55.64	\$1.51	3
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$629	\$53.92	\$1.37	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$576	\$52.99	\$1.35	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,929	\$352	\$32.58	\$0.83	3
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$336	\$36.21	\$0.92	1
	Des Moines, IA	Amarillo, TX	\$3,510	\$275	\$37.59	\$0.95	2
	Minneapolis, MN	Tacoma, WA	\$4,800	\$624	\$53.87	\$1.37	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$646	\$48.12	\$1.22	1
	Sioux Falls, SD	Tacoma, WA	\$5,320	\$576	\$58.55	\$1.59	6
	Minneapolis, MN	Portland, OR	\$5,330	\$629	\$59.18	\$1.61	6
	Fargo, ND	Tacoma, WA	\$5,230	\$512	\$57.02	\$1.55	6
	Council Bluffs, IA	New Orleans, LA	\$3,950	\$406	\$43.26	\$1.18	6
	Toledo, OH	Huntsville, AL	\$2,750	\$289	\$30.18	\$0.82	3
Grand Island, NE	Portland, OR	\$4,960	\$573	\$54.94	\$1.50	-2	

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

75-120 cars that meet railroad efficiency requirements.

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change Y/Y ⁴	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$6,360	\$547	\$70.57	\$1.92	-16
	OK	Cuautitlan, EM	\$6,715	\$664	\$75.40	\$2.05	-1
	KS	Guadalajara, JA	\$8,293	\$642	\$91.29	\$2.48	11
	TX	Salinas Victoria, NL	\$2,872	\$250	\$31.90	\$0.87	-21
Corn	IA	Guadalajara, JA	\$7,699	\$754	\$86.37	\$2.19	1
	SD	Celaya, GJ ⁵	\$7,356	\$715	\$82.47	\$2.09	n/a
	NE	Queretaro, QA	\$7,153	\$670	\$79.94	\$2.03	1
	SD	Salinas Victoria, NL	\$5,700	\$544	\$63.80	\$1.62	1
	MO	Tlalnepantla, EM	\$6,592	\$651	\$74.00	\$1.88	1
	SD	Torreon, CU	\$6,522	\$599	\$72.76	\$1.85	0
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$636	\$83.95	\$2.28	3
	NE	Guadalajara, JA	\$8,134	\$728	\$90.55	\$2.46	3
	IA	El Castillo, JA	\$8,555	\$711	\$94.68	\$2.57	4
	KS	Torreon, CU	\$6,651	\$452	\$72.57	\$1.97	4
Sorghum	TX	Guadalajara, JA	\$6,464	\$465	\$70.80	\$1.80	-2
	NE	Celaya, GJ ⁵	\$6,997	\$649	\$78.12	\$1.98	n/a
	KS	Queretaro, QA	\$6,815	\$408	\$73.80	\$1.87	6
	NE	Salinas Victoria, NL	\$5,438	\$478	\$60.44	\$1.53	6
	NE	Torreon, CU	\$6,153	\$533	\$68.32	\$1.73	2

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

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

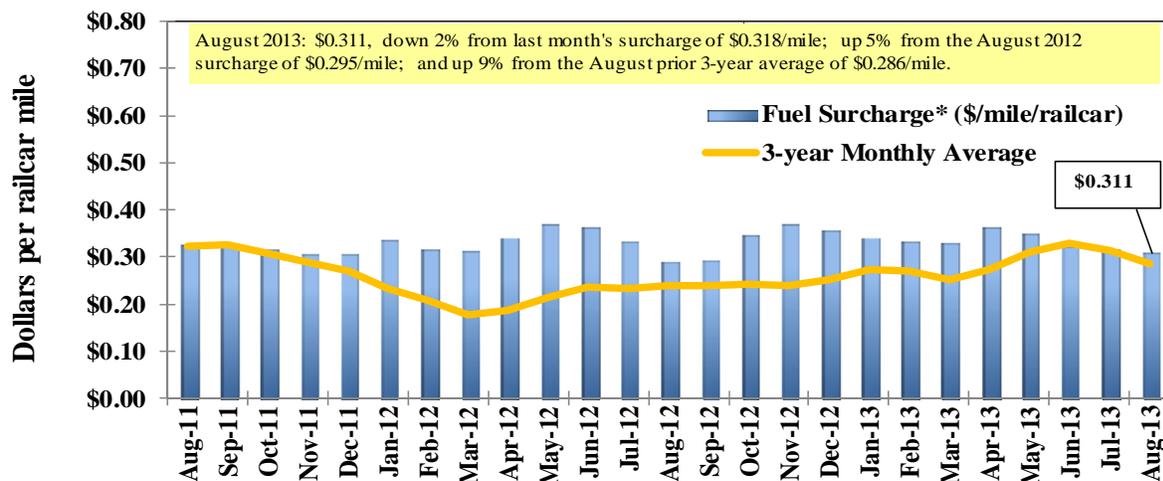
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

⁵Beginning 11/1/12, Celaya, GJ, replaced Penjamo, GJ, as the destination.

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

¹ Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

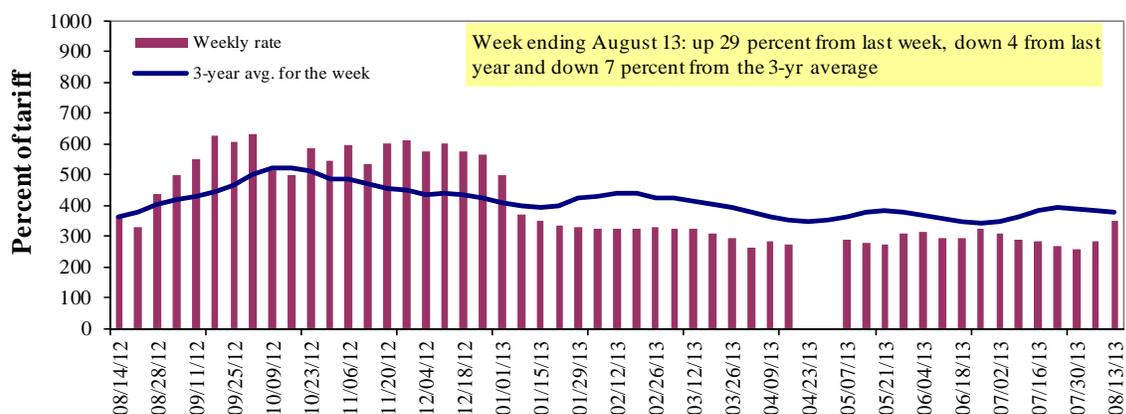
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	8/13/2013	370	353	352	308	360	360	278
	8/6/2013	337	297	285	230	277	277	203
\$/ton	8/13/2013	22.90	18.78	16.33	12.29	16.88	14.54	8.73
	8/6/2013	20.86	15.80	13.22	9.18	12.99	11.19	6.37
Current week % change from the same week:								
	Last year	-8	-4	-4	-11	3	3	-28
	3-year avg. ²	-18	-13	-7	-5	-5	-5	-12
Rate¹	September	515	483	483	462	487	487	430
	November	613	513	505	430	478	478	403

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

Source: Transportation & Marketing Programs/AMS/USDA

Calculating barge rate per ton:

(Index * 1976 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 9

Benchmark tariff rates

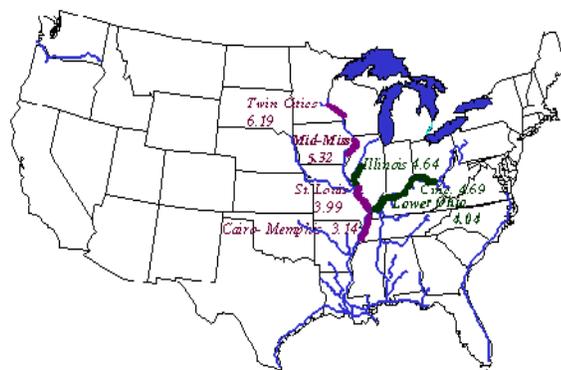
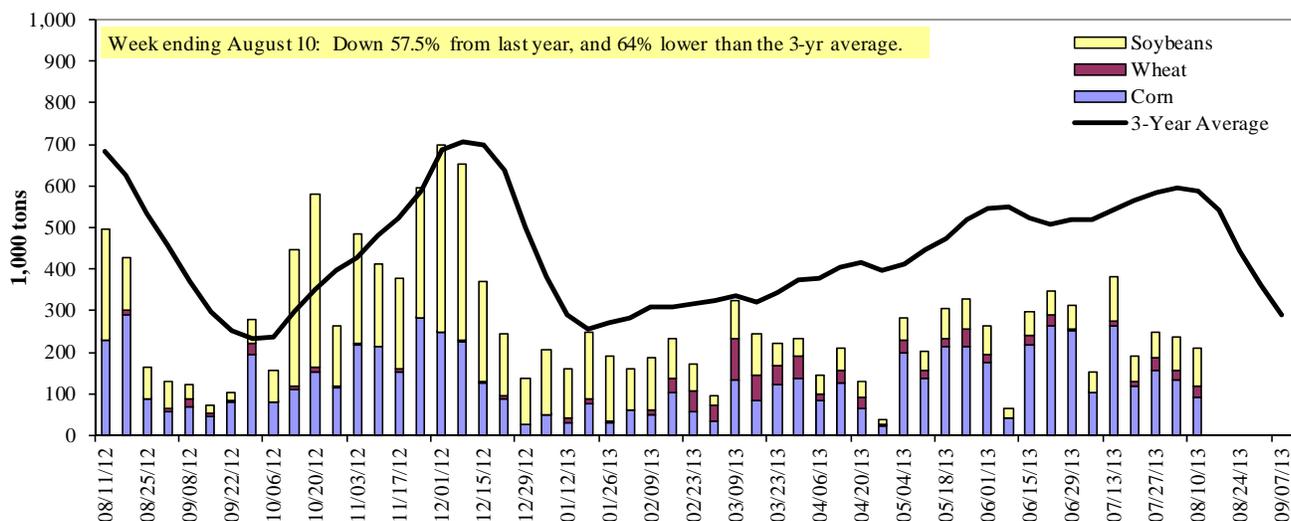


Figure 10

Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

Week ending 8/10/2013	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	56	17	20	2	95
Winfield, MO (L25)	91	29	72	0	192
Alton, IL (L26)	90	26	91	2	208
Granite City, IL (L27)	90	28	93	2	212
Illinois River (L8)	11	0	5	2	17
Ohio River (L52)	20	135	2	0	156
Arkansas River (L1)	0	59	0	0	59
Weekly total - 2013	110	222	94	2	428
Weekly total - 2012	254	50	313	0	617
2013 YTD ¹	5,140	2,886	4,428	134	12,588
2012 YTD	11,139	1,294	6,816	189	19,438
2013 as % of 2012 YTD	46	223	65	71	65
Last 4 weeks as % of 2012 ²	47	410	28	124	61
Total 2012	14,837	1,794	12,663	229	29,523

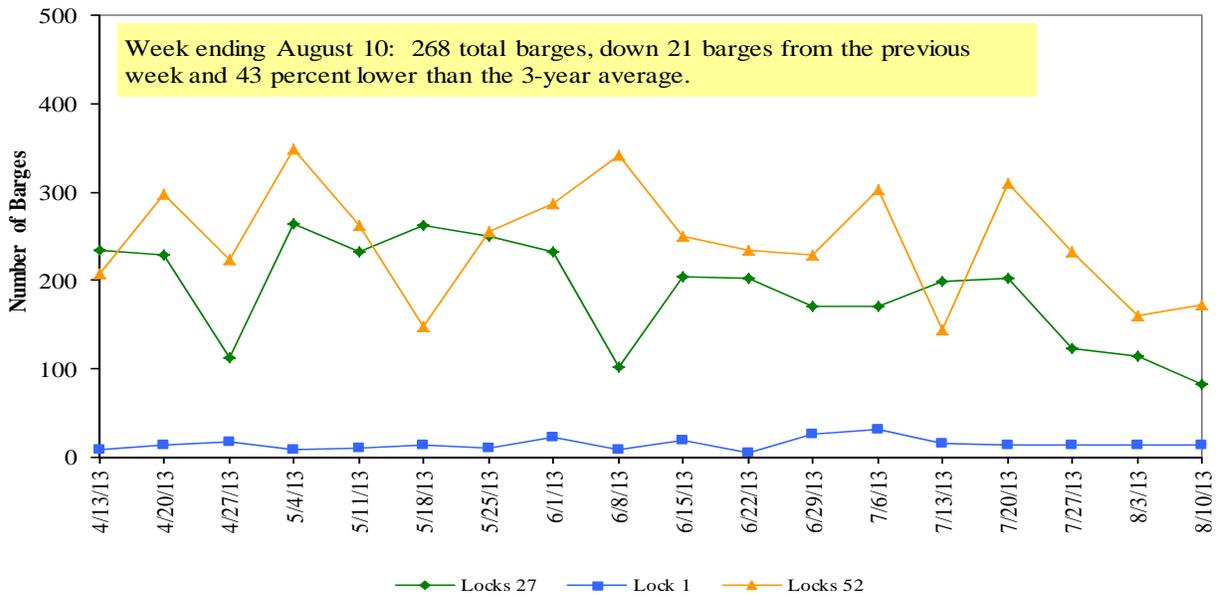
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2012.

Note: Total may not add exactly, due to rounding

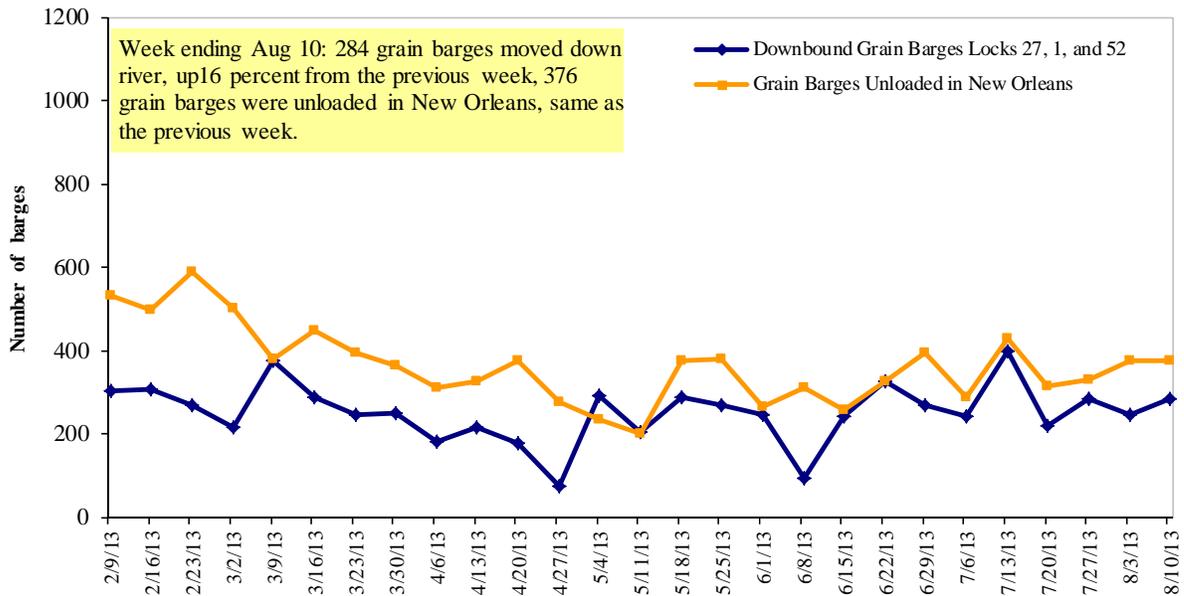
Source: U.S. Army Corps of Engineers

Figure 11
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



Source: U.S. Army Corps of Engineers and GIPSA

Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 8/12/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.908	-0.011	-0.044
	New England	4.045	-0.011	0.034
	Central Atlantic	3.972	-0.011	-0.032
	Lower Atlantic	3.834	-0.011	-0.067
II	Midwest ²	3.862	-0.016	-0.106
III	Gulf Coast ³	3.824	-0.017	-0.032
IV	Rocky Mountain	3.930	-0.001	-0.028
V	West Coast	4.045	-0.009	-0.107
	West Coast less California	3.946	-0.015	-0.132
	California	4.128	-0.005	-0.087
Total	U.S.	3.896	-0.013	-0.069

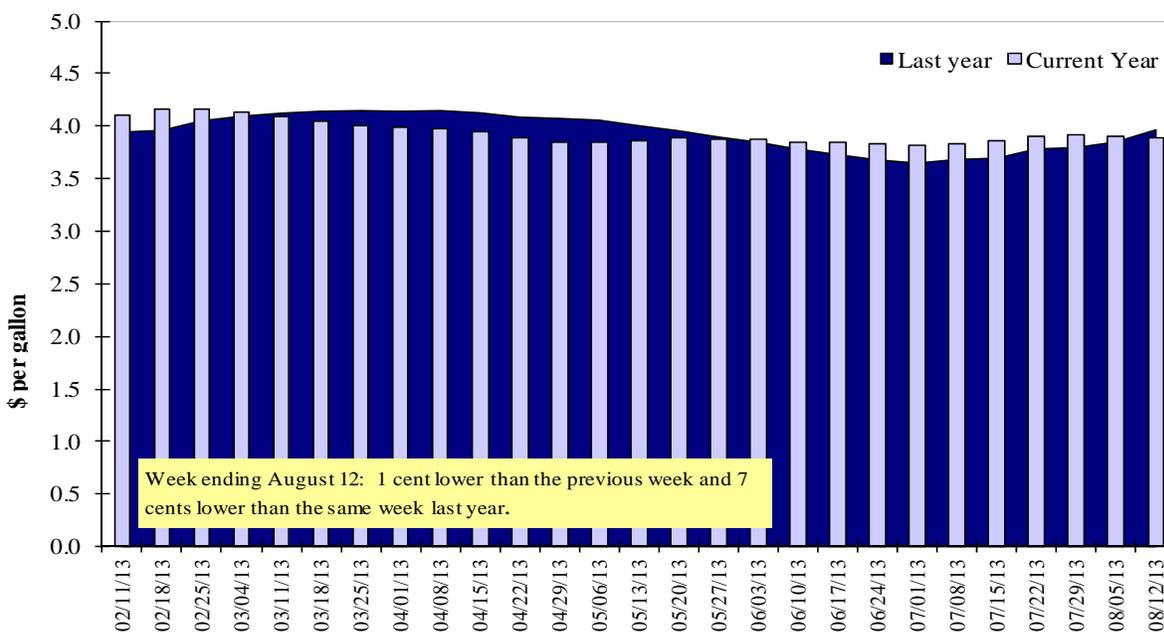
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
8/1/2013	2,002	3,462	1,440	1,043	100	8,047	2,381	1,326	11,754
This week year ago	1,535	681	1,525	1,267	132	5,141	3,430	3,880	12,451
Cumulative exports-marketing year²									
2012/13 YTD	2,495	1,836	792	417	32	5,572	16,728	35,843	58,143
2011/12 YTD	2,129	741	903	566	78	4,417	36,057	34,709	75,183
YTD 2012/13 as % of 2011/12	117	248	88	74	n/a	126	46	103	77
Last 4 wks as % of same period 2011/12	124	540	87	85	67	157	77	33	96
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year 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)

Table 13

Top 5 Importers¹ of U.S. Corn

Week ending 08/01/2013	Total Commitments ²			% change current MY from last MY	Exports ³ 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	1,104	7,355	12,193	(40)	12,367
Mexico	2,139	4,437	9,572	(54)	9,617
China	2,958	2,505	5,255	(52)	5,414
Korea	3	418	3,739	(89)	3,639
Venezuela	16	1,164	1,242	(6)	1,332
Top 5 Importers	6,220	15,880	32,000	(50)	32,369
Total US corn export sales	9,302	19,109	39,488	(52)	39,180
% of Projected	30%	105%	101%		
Change from prior week	221	290	175		
Top 5 importers' share of U.S. corn export sales	67%	83%	81%		83%
USDA forecast, August 2013	31,120	18,160	39,180	(54)	
Corn Use for Ethanol USDA forecast, Ethanol August 2013	124,460	118,110	127,280	(7)	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

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

³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm (Carry-over plus Accumulated Exports)

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 08/01/2013	Total Commitments ²			% change current MY from last MY	Exports ³ 2011/12
	2013/14 Next MY	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	11,733	21,599	24,211	(11)	24,602
Mexico	415	2,600	3,177	(18)	3,180
Japan	177	1,820	1,800	1	1,891
Indonesia	59	1,648	1,565	5	1,741
Egypt	120	677	1,284	(47)	1,292
Top 5 importers	12,503	28,344	32,037	(12)	32,706
Total US soybean export sales	16,018	37,169	38,589	(4)	37,060
% of Projected	42%	104%	104%		
Change from prior week	1,018	79	105		
Top 5 importers' share of U.S. soybean export sales	78%	76%	83%		
USDA forecast, August 2013	37,690	35,790	37,060	(3)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 08/01/2013	Total Commitments ²		% change current MY from last MY	Exports ³ 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	947	1,212	(22)	3,544
Nigeria	895	895	(0)	3,002
Mexico	1,261	1,254	1	2,761
Philippines	622	790	(21)	1,965
Egypt	131	58	125	1,678
Korea	361	645	(44)	1,385
Taiwan	316	342	(8)	1,038
China	3,641	341	967	743
Brazil	1,453	50	2806	527
Colombia	359	203	77	600
Top 10 importers	9,985	5,790	72	17,243
Total US wheat export sales	13,619	9,557	42	26,348
% of Projected	45%	35%		
Change from prior week	726	639		
Top 10 importers' share of U.S. wheat export sales	73%	61%		65%
USDA forecast, August 2013	29,940	27,420	9	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>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 08/08/13	Previous Week ¹	Current Week as % of Previous	2013 YTD ¹	2012 YTD ¹	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total ¹ 2012
							2012	3-yr. avg.	
Pacific Northwest									
Wheat	129	161	80	6,756	8,076	84	104	88	12,625
Corn	38	0	n/a	1,359	4,851	28	6	4	5,512
Soybeans	0	0	n/a	3,696	5,416	68	0	0	10,347
Total	167	161	104	11,811	18,343	64	50	38	28,484
Mississippi Gulf									
Wheat	233	242	97	5,851	3,926	149	207	230	5,462
Corn	262	325	80	6,972	12,382	56	97	60	18,068
Soybeans	83	30	277	7,564	10,981	69	20	35	24,684
Total	578	597	97	20,387	27,289	75	85	79	48,215
Texas Gulf									
Wheat	191	302	63	5,526	3,978	139	168	136	5,912
Corn	0	22	0	148	325	46	n/a	40	336
Soybeans	0	0	n/a	122	5	n/a	n/a	0	626
Total	191	324	59	5,797	4,308	135	172	129	6,874
Interior									
Wheat	68	28	246	672	791	85	175	104	1,218
Corn	76	30	257	1,620	4,824	34	153	38	6,115
Soybeans	9	4	210	1,770	2,676	66	61	27	4,204
Total	153	61	249	4,062	8,291	49	106	42	11,538
Great Lakes									
Wheat	16	0	n/a	476	182	261	142	39	481
Corn	0	0	n/a	0	46	0	n/a	0	56
Soybeans	0	0	n/a	22	148	15	0	0	713
Total	16	0	n/a	498	376	132	44	27	1,250
Atlantic									
Wheat	14	41	34	485	235	206	661	378	341
Corn	0	0	n/a	2	101	2	0	0	143
Soybeans	1	2	68	695	588	118	9	11	1,460
Total	15	43	35	1,182	924	128	175	125	1,944
U.S. total from ports²									
Wheat	651	774	84	19,766	17,189	115	153	133	26,040
Corn	376	377	100	10,101	22,530	45	61	39	30,230
Soybeans	93	36	261	13,870	19,813	70	17	25	42,035
Total	1,120	1,186	94	43,737	59,531	73	78	67	98,305

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

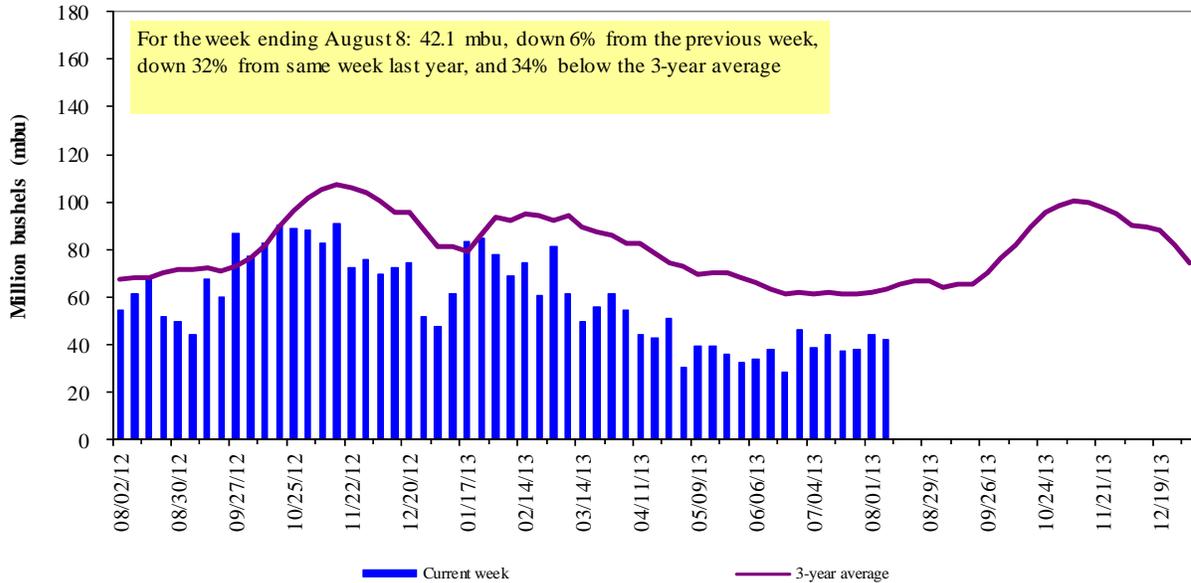
² Total includes only port regions shown above; Interior land-based shipments now included.

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

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

Figure 14

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

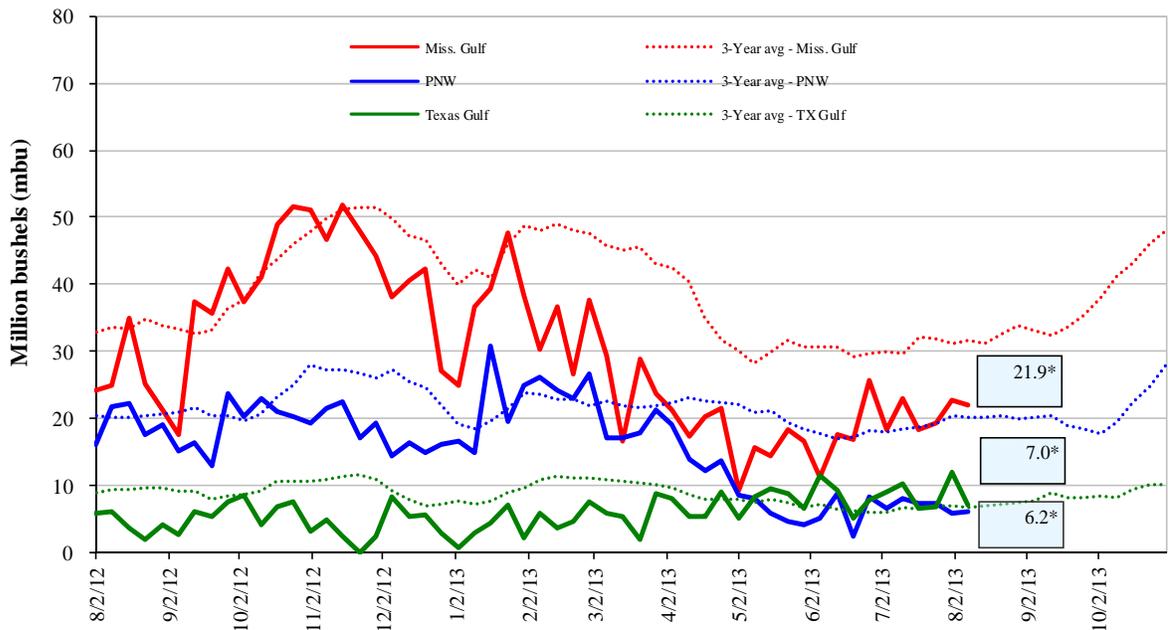


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



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

Aug. 8 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 4	up 11	down 17	up 5
Last year (same week)	down 12	up 67	down 7	down 71
3-yr avg. (4-wk mov. avg.)	down 22	up 55	down 16	down 68

Ocean Transportation

Table 17

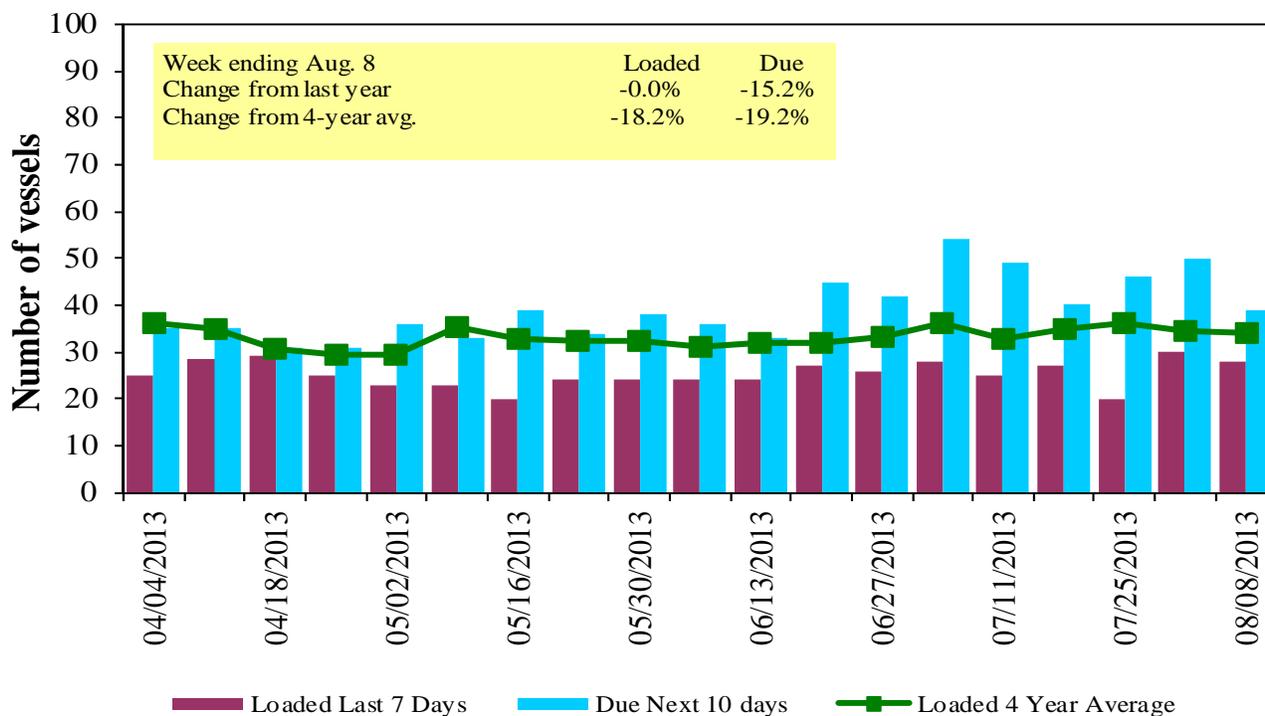
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/8/2013	33	28	39	9	n/a
8/1/2013	22	30	50	3	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. Gulf¹ Vessel Loading Activity

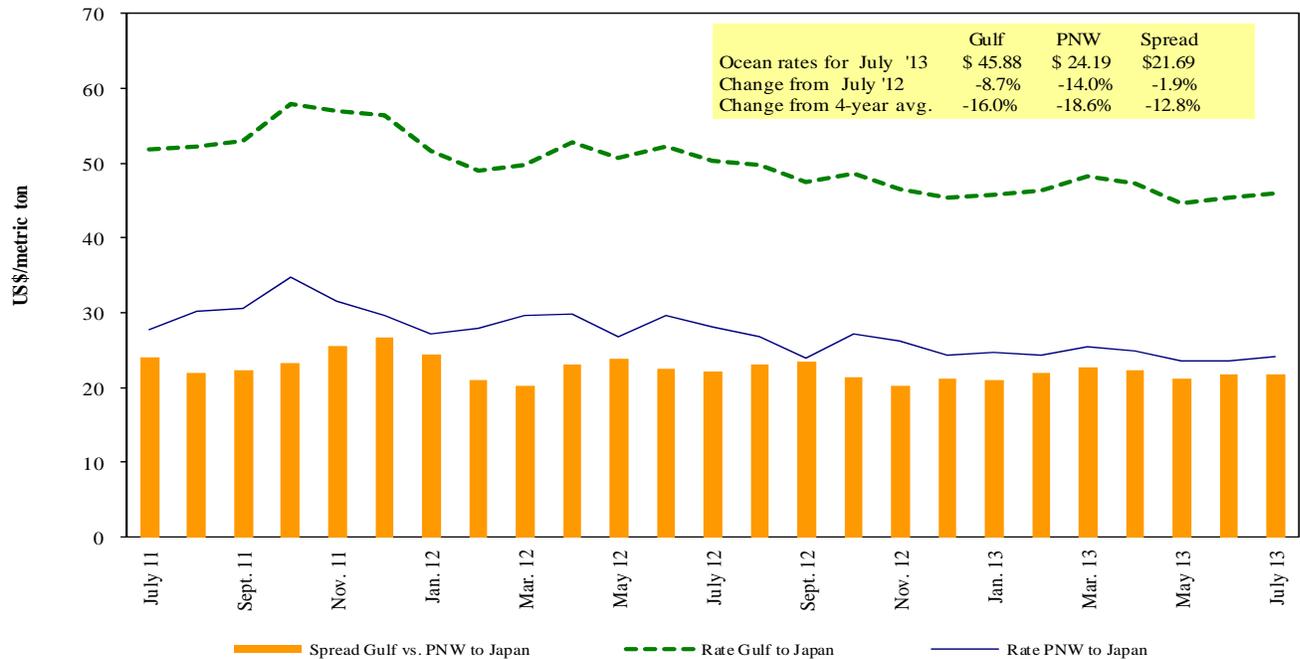


Source: Transportation & Marketing Programs/AMS/USDA

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 08/10/2013

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	Italy	Heavy Grain	Jul 31/Aug 3	70,000	30.50
PNW	Bangladesh ¹	Wheat	Jun 10/20	4,610	98.00
Brazil	China	Heavy Grain	Aug 20/30	60,000	34.25
Brazil	China	Heavy Grain	Aug 1/15	60,000	34.75
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	S. Korea	Heavy Grain	Aug 14/19	60,000	35.50
Brazil	Portugal	Corn	Jul 12/29	60,000	21.50
France	Saudi Arabia	Barley	Aug 1/5	64,000	29.50
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	Kenya	Wheat	July 19/24	35,000	36.50
Ukraine	Iran	Wheat	Jun 10/18	60,000	32.50

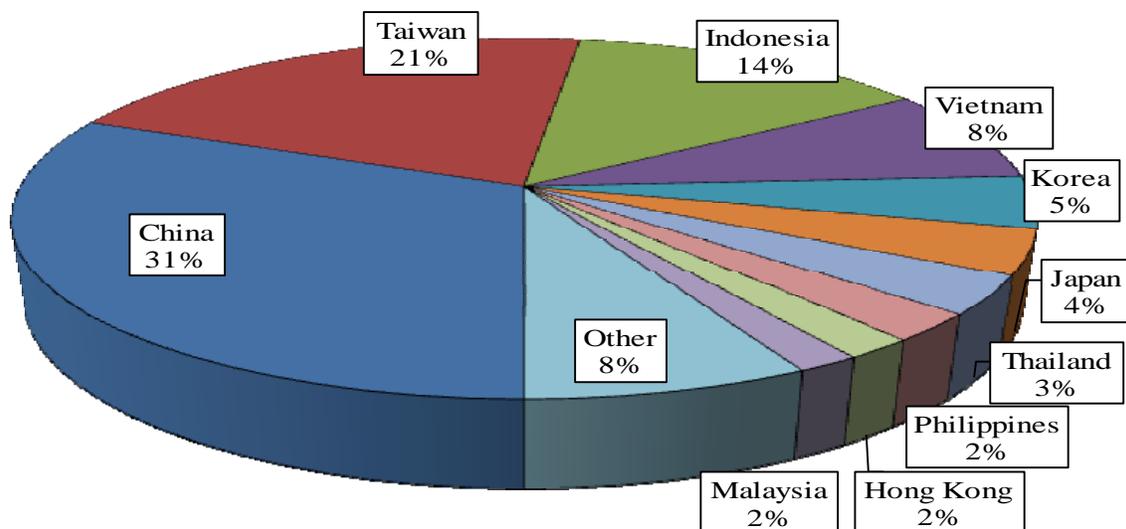
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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

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

In 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.

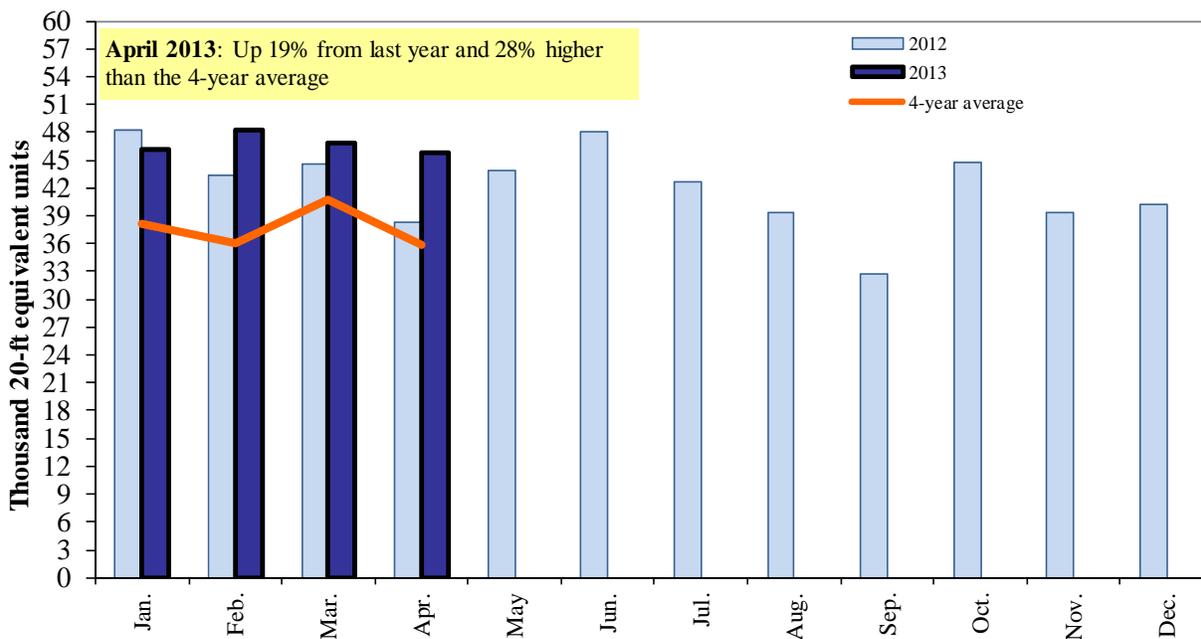
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, April 2013



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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