



# Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division  
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September 4, 2014

## WEEKLY HIGHLIGHTS

### MOU Between Port of Vancouver and North Dakota Offers Some Relief for Grain Shipments

On August 27, the Port of Vancouver and the North Dakota Department of Agriculture signed a memorandum of understanding (MOU) to ship products such as lumber, paper, cement, and fertilizer east to North Dakota and return them to the Port filled with North Dakota products such as wheat, corn, soybeans, peas, flax, and other specialty crops. This MOU addresses railcars that are often returned to the Port empty and helps alleviate the railcar shortage in North Dakota. The Port is planning to purchase 180 railcars and ship two shuttle trains per month, with the first full railcars returning to the Port from North Dakota as early as mid-September. The Port is working with BNSF Railway on the project and may expand service under the MOU if demand grows.

### Wheat Inspections Rebound

For the week ending August 28, total inspections of wheat reached .815 million metric tons (mmt), up 33 percent from the past week and 19 percent above the 3-year average. Wheat inspections were also the highest since September 26, 2013, with increased shipments to Asia and Latin America. Total corn inspections reached .835 mmt, down 23 percent from the previous week. Soybean inspections reached only .036 mmt, down 76 percent from the past week and the lowest since August of last year. **Total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 1.69 mmt, down 8 percent from the past week, but up 13 percent from last year and 14 percent above the 3-year average. Mississippi Gulf and Pacific Northwest inspections decreased from the past week, but Texas Gulf wheat inspections increased due to more wheat inspections.

### New Crop Soybean Export Sales Increase as Tight Supplies Push Old Crop Soybean Basis to Record Levels

During the week ending August 21, soybean export sales reached 20.8 mmt, 1.1 mmt higher than last year at this time, indicating demand for new crop soybeans is likely to be strong at harvest. Over the past several weeks, old crop (2013 harvest) soybean basis (the difference between the futures and the local cash prices) have jumped to record levels. During the week ending August 28, soybean basis in Iowa averaged +\$2.85/bushel, almost 27 cents/bushel more than the Louisiana Gulf basis of +\$2.58/bushel. Typically, basis is higher at export locations than in locations closer to growing areas because of transportation costs. This inverted price structure indicates the demand for the tight soybean stocks is higher in the domestic market. The four early-harvest States in the South (Alabama, Arkansas, Louisiana, and Tennessee) are expected to produce 12 percent more soybeans in 2014 than in 2013.

### Possibility of Highest Barge Rates in 6 Years

Barge operators expect strong demand for their services during this year's harvest, especially in October, when there is widespread harvesting of the corn and soybean crops. As of September 2, the average barge rate from the Illinois River to the Mississippi River Gulf for October delivery was 773 percent of tariff (\$35.84 per ton), 43 percent higher than the 5-year average. The October St. Louis barge rate was 763 percent of tariff (\$30.42 per ton), 56 percent higher than the 5-year average. Grain shippers may decide to buy barge freight for October now, or wait until then and buy at the weekly rate, which could be higher or lower than the October rate being quoted now. The last time rates exceeded these levels was in 2008, when flooding interfered with barge logistics on the Upper Mississippi and Illinois Rivers.

### Maersk and MSC Seek FMC Approval for New Vessel-Sharing Agreement

The two largest global ocean carrier carriers have filed with the Federal Maritime Commission (FMC) their intent to develop a vessel-sharing agreement which they call "2M." The FMC has 45 days to approve the new agreement or seek a federal injunction to block it. The 2M agreement will allow Maersk Line and Mediterranean Shipping Company to "consolidate their services around fewer but larger ships, resulting in lower per-container operating costs and giving them a cost advantage over carriers and alliances that operate smaller vessels," according to a recent article in the Journal of Commerce.

## Snapshots by Sector

### Rail

U.S. railroads originated 18,721 **carloads of grain** during the week ending August 23, up 5 percent from last week, 18 percent from last year, and 9 percent from the 3-year average.

During the week ending August 28, average September non-shuttle **secondary railcar bids/offers per car** were \$600 above tariff, down \$400 from last week and \$429 higher than last year. Average shuttle secondary railcar bids/offers per car were \$1,118 above tariff, up \$194 from last week and \$927 higher than last year.

### Barge

During the week ending August 30 **barge grain movements** totaled 715,219 tons—19 percent higher than the previous week and 413 percent higher than the same period last year.

During the week ending August 30, 457 grain barges **moved down river**, up 20.6 percent from last week; 474 grain barges were **unloaded in New Orleans**, down 0.2 percent from the previous week.

### Ocean

During the week ending August 28, 25 **ocean-going grain vessels** were loaded in the Gulf, 4 percent less than the same period last year. Forty-eight vessels are expected to be loaded within the next 10 days, 6 percent less than the same period last year.

During the week ending August 29, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$46 per mt, up 5 percent from the previous week. The cost of shipping from the PNW to Japan was \$26 per mt, up 6 percent from the previous week.

### Fuel

During the week ending September 1, U.S. average **diesel fuel prices** decreased 1 cent from the previous week to \$3.81 per gallon, down 17 cents from the same week last year.

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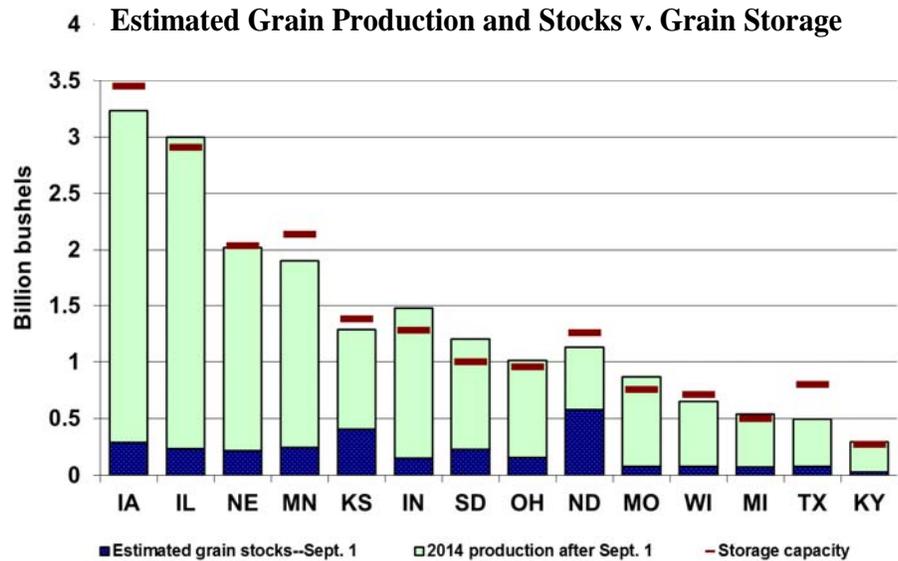
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## Grain Production Expected to Exceed Storage Capacity: Transportation Service Critical

Grain production and grain stocks this harvest season are expected to exceed permanent grain storage capacity by an estimated 694 million bushels (about 3.5 percent of the expected U.S. record harvest) in seven States, which include—in decreasing order of storage capacity shortage—South Dakota, Indiana, Missouri, Illinois, Ohio, Michigan, and Kentucky (see figure). This quantity is the equivalent of 173,500 jumbo covered-hopper rail cars, 13,219 barges, 881 15-barge tows, or 762,600 truckloads.<sup>1</sup> Some of the impact could be mitigated by temporary storage; under special circumstances with unusually large crops, USDA sometimes allows emergency and temporary storage of grain, with the storing entity continuing to be financially responsible for the quantity and quality of the grain.

South Dakota could be short of grain storage capacity by 197 million bushels (20 percent of storage capacity); it is estimated to have the greatest grain storage shortage in addition to continued rail service delays due to competition for rail capacity. Indiana could be short by 196 million bushels (15 percent), Missouri by 109 million bushels (15 percent), Illinois by 83 million bushels (3 percent), Ohio by 55 million bushels (6 percent), Michigan by 33 million bushels (7 percent), and Kentucky by 20 million bushels (7 percent).<sup>2</sup> The red lines in the bar graph above represent the estimated surplus storage capacity (red line above the bar) or shortage of storage capacity (red line inside the bar).



These levels of storage capacity shortage are higher than any year since 2010, which had an 805 million bushel shortfall in permanent storage capacity distributed throughout the top 14 grain-producing States. Because lots of 2013 grain is reported still to be in storage and waiting to be moved before the 2014 harvest, it is critical to move as much of the 2013 grain crop as quickly and efficiently as possible. Rail service delays have already cost U.S. grain producers in some areas millions of dollars in 2014. A North Dakota study indicates that North Dakota producers lost as much as \$162 million<sup>3</sup> and a University of Minnesota study indicates that Minnesota producers lost \$72 million between March and May.<sup>4</sup>

<sup>1</sup> Iowa Department of Transportation, <http://www.iowadot.gov/compare.pdf>.

<sup>2</sup> September 1 grain stocks were estimated by combining the projected increase in July–August grain production (over the 2011–2013 July–August average grain production) with the June 1, 2014 grain stocks multiplied by the June 1, 2014 grain stocks divided by the 2011–2013 average June 1 grain stocks. Estimated 2014 grain production by State was from the USDA projections contained in *Crop Production*, August 12, 2014. Storage capacity is the December 1, 2013 grain storage capacity from the USDA *Grain Stocks Report*. Crops include corn, soybeans, wheat, oats, barley, and sorghum.

<sup>3</sup> Olson, Frayne, *Effects of 2013/14 Rail Transportation Problems on North Dakota Farm Income*, Executive Summary to Senator Heidi Heitkamp.

<sup>4</sup> Usset, Edward, University of Minnesota, presentation at *Envisioning the Future of Agricultural Freight in Minnesota*, Alexandria, Minnesota, July 10, 2014.

This year's fall harvest is expected to be challenging because of rail service delays, a bumper crop, and limited storage. Rail service delays are expected to continue because of brisk competition for limited rail capacity from oil, coal, intermodal, and cars resulting in rail congestion. These rail service delays also are expected to continue adding to the cost of moving this fall's harvest.

According to its August 29 report to the Surface Transportation Board, BNSF had 2,029 grain cars past due an average of 10.6 days, down 22 percent from the 2,609 it reported the prior week. One-half of the past due grain cars are located in North Dakota and are 10 days late. BNSF also reported 408 past due grain cars in Montana and 251 in South Dakota.

Canadian Pacific (CP) reports that customers have removed 20,710 open requests for grain cars from its system, leaving open requests of 9,010 as of August 29. Grain car requests in North Dakota were reported to be 13.14 weeks late, while those in Minnesota were 18.76 weeks late. CP fulfilled 2,194 grain car orders during the week and reported that new requests for grain cars totaled 990. Of the fulfilled orders, only 165 grain car orders were moved on the Rapid City, Pierre & Eastern Railroad (RCP&E) line in South Dakota.

[Marvin.Prater@ams.usda.gov](mailto:Marvin.Prater@ams.usda.gov)

# Grain Transportation Indicators

Table 1

## Grain Transport Cost Indicators<sup>1</sup>

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
09/03/14	256	274	261	331	206	184
08/27/14	256	297	254	261	197	174

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

Source: Transportation & Marketing Programs/AMS/USDA

\*No quote for Illinois River as ice accumulation severely limited barge operations.

Table 2

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

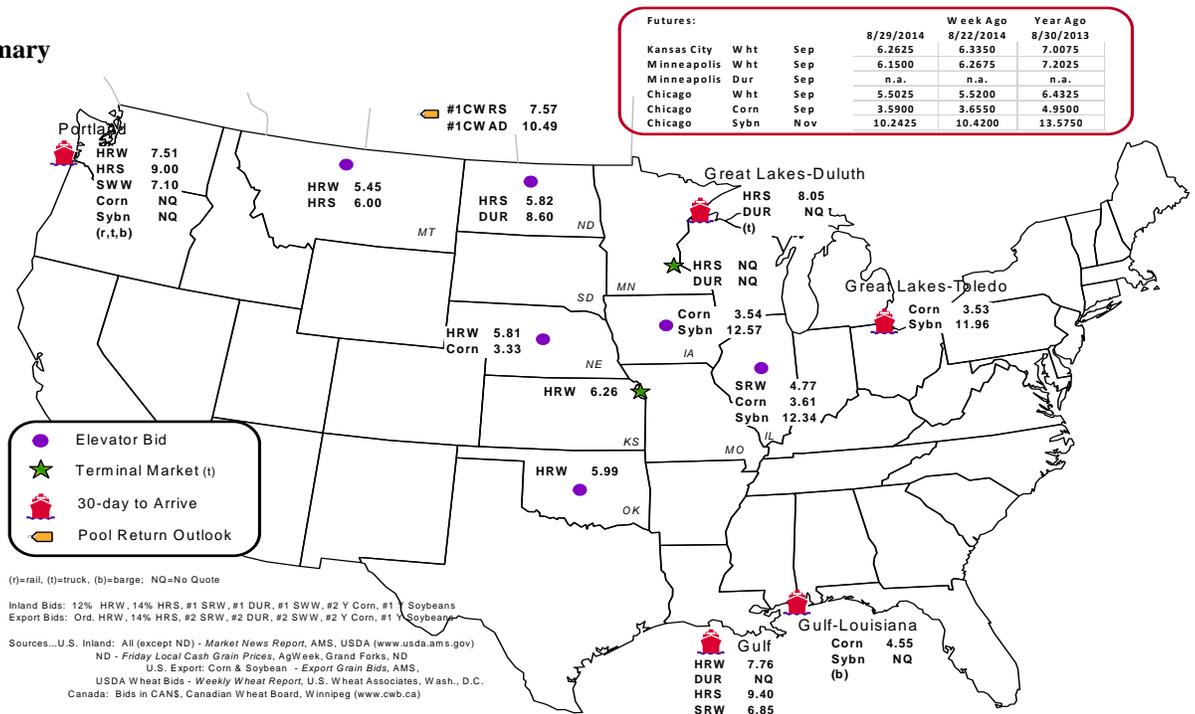
Commodity	Origin--Destination	8/29/2014	8/22/2014
Corn	IL--Gulf	-0.94	-0.88
Corn	NE--Gulf	-1.22	-1.14
Soybean	IA--Gulf	n/a	-0.90
HRW	KS--Gulf	-1.50	-1.55
HRS	ND--Portland	-3.18	-3.34

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1  
Grain bid Summary



# Rail Transportation

Table 3

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

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
8/27/2014 <sup>p</sup>	239	1,394	4,049	383	6,065	8/23/2014	1,817
8/20/2014 <sup>r</sup>	34	1,639	4,260	153	6,086	8/16/2014	2,201
2014 YTD <sup>r</sup>	21,297	57,020	154,733	17,883	250,933	2014 YTD	65,890
2013 YTD <sup>r</sup>	9,988	46,712	83,890	10,070	150,660	2013 YTD	41,419
2014 YTD as % of 2013 YTD	213	122	184	178	167	% change YTD	159
Last 4 weeks as % of 2013 <sup>2</sup>	626	78	201	881	147	Last 4wks % 2013	140
Last 4 weeks as % of 4-year avg. <sup>2</sup>	89	122	135	261	132	Last 4wks % 4 yr	114
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	70,298
Total 2012	22,604	40,780	199,419	24,659	287,462	Total 2012	92,008

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

<sup>2</sup> Compared with same 4-weeks in 2013 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.

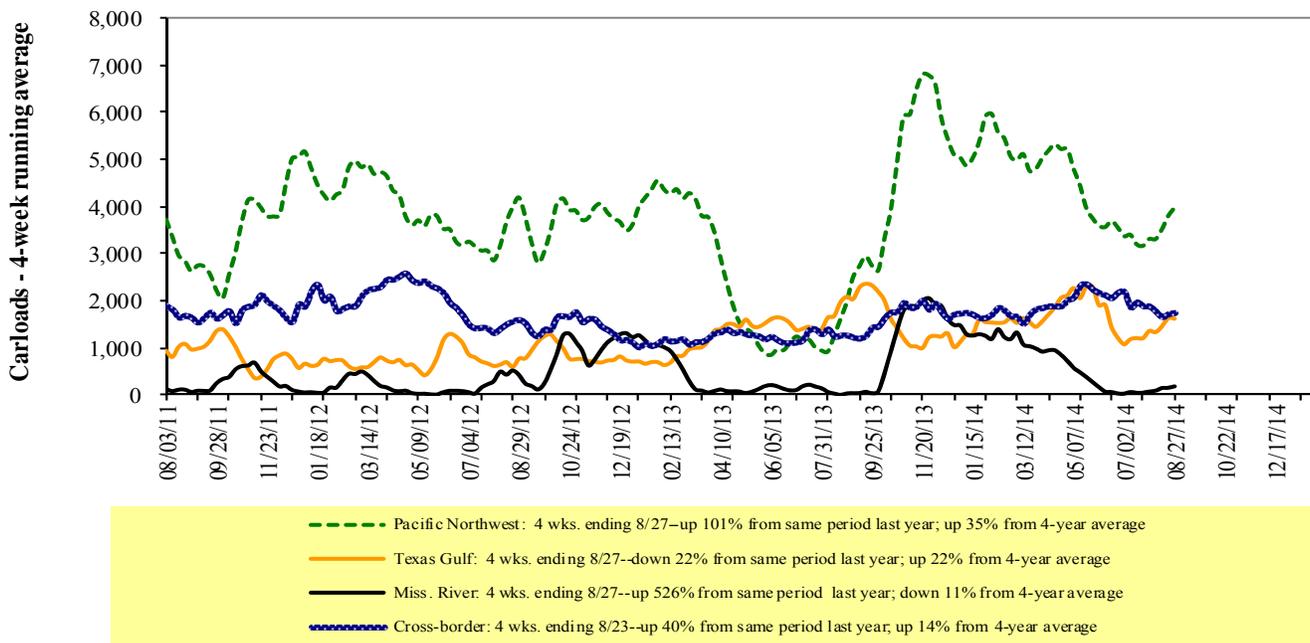
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

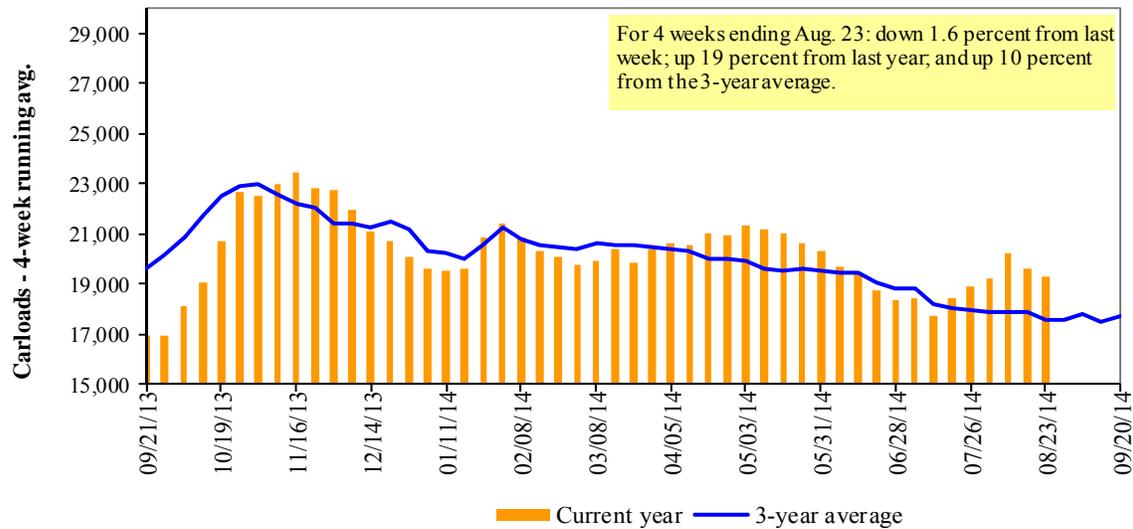
Table 4

**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
08/23/14	1,600	2,369	8,877	742	5,133	18,721	4,271	5,696
This week last year	1,043	1,452	8,718	887	3,825	15,925	3,314	4,913
2014 YTD	63,261	99,405	294,683	28,505	191,760	677,614	150,084	179,583
2013 YTD	47,879	83,186	289,235	17,369	129,549	567,218	107,115	174,483
2014 YTD as % of 2013 YTD	132	119	102	164	148	119	140	103
Last 4 weeks as % of 2013	147	152	100	90	144	119	152	111
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	144	122	96	106	128	111	135	102
Total 2013	86,466	137,915	454,262	34,412	222,258	935,313	190,125	272,753

<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								
	8/28/2014	Sep-14	Sep-13	Oct-14	Oct-13	Nov-14	Nov-13	Dec-14	Dec-13
BNSF <sup>3</sup>									
COT grain units	no offer	579	no offer	630	no offer	306	no offer	108	
COT grain single-car <sup>5</sup>	no offer	no offer	no offer	101 . . 211	no offer	50 . . 600	no offer	0 . . 200	
UP <sup>4</sup>									
GCAS/Region 1	no offer	no bids	1501	1	879	no bids	n/a	n/a	
GCAS/Region 2	no offer	1	2109	16	962	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.

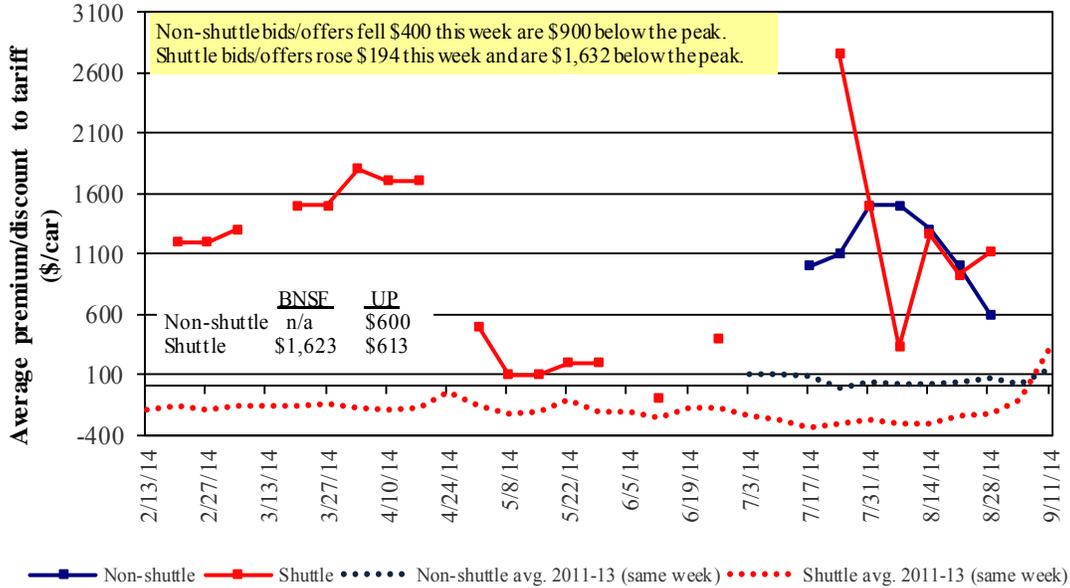
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 September 2014, Secondary Market**

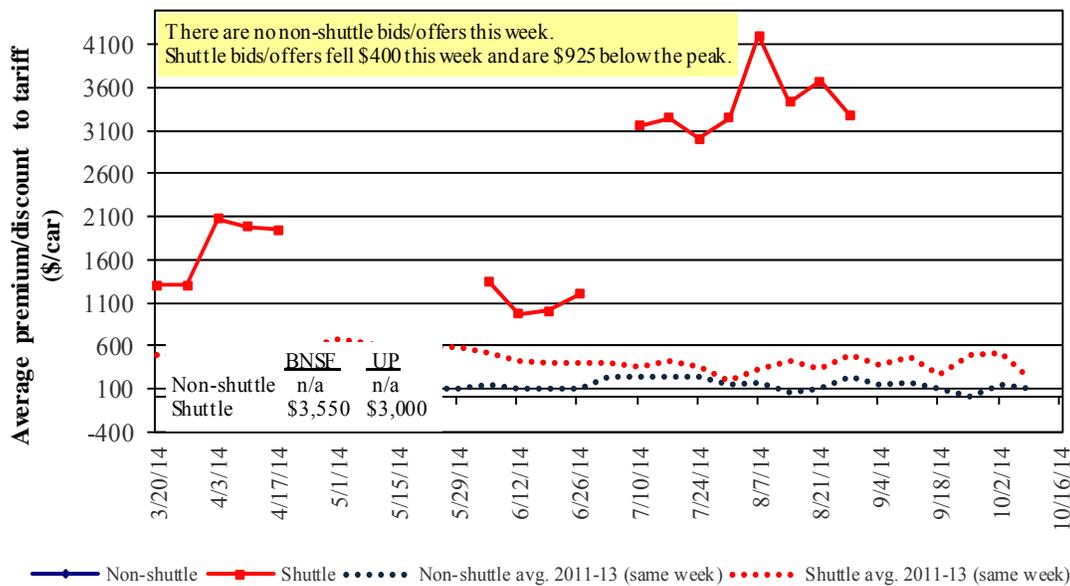


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in October 2014, Secondary Market**

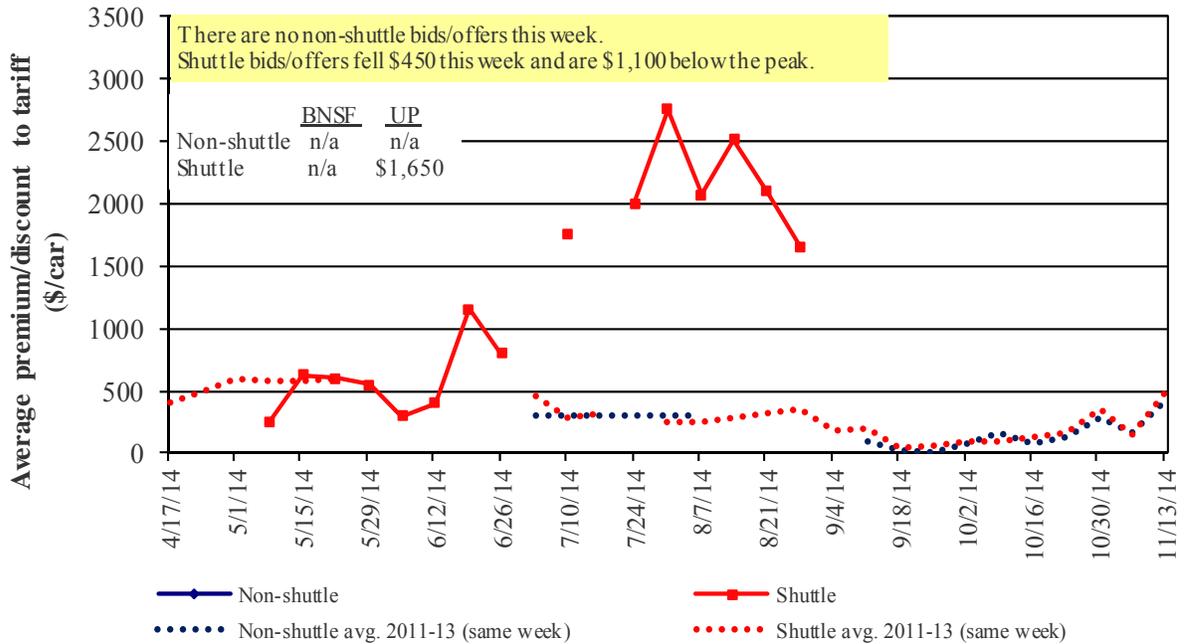


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in November 2014, 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					
	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15
<b>Non-shuttle</b>						
BNSF-GF	n/a	n/a	n/a	n/a	n/a	n/a
Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	600	n/a	n/a	n/a	n/a	n/a
Change from last week	(400)	n/a	n/a	n/a	n/a	n/a
Change from same week 2013	525	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	1,623	3,550	n/a	n/a	n/a	n/a
Change from last week	50	(450)	n/a	n/a	n/a	n/a
Change from same week 2013	1,340	2,950	n/a	n/a	n/a	n/a
UP-Pool	613	3,000	1,650	1,025	n/a	n/a
Change from last week	338	(350)	(450)	(375)	n/a	n/a
Change from same week 2013	513	2,200	n/a	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from James B. Joiner Co., Tradewest Brokerage Co.

Table 7

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

Effective date:			Tariff	Fuel	Tariff plus surcharge per:		Percent
9/1/2014	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushel <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$182	\$35.44	\$0.96	6
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$104	\$36.75	\$1.00	-3
	Wichita, KS	Los Angeles, CA	\$6,244	\$536	\$67.32	\$1.83	0
	Wichita, KS	New Orleans, LA	\$4,026	\$320	\$43.16	\$1.17	5
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$440	\$62.20	\$1.69	0
	Northwest KS	Galveston-Houston, TX	\$4,293	\$351	\$46.12	\$1.26	5
	Amarillo, TX	Los Angeles, CA	\$4,492	\$489	\$49.46	\$1.35	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$362	\$35.29	\$0.90	2
	Toledo, OH	Raleigh, NC	\$4,686	\$416	\$50.66	\$1.29	4
	Des Moines, IA	Davenport, IA	\$2,078	\$77	\$21.40	\$0.54	3
	Indianapolis, IN	Atlanta, GA	\$4,061	\$312	\$43.43	\$1.10	3
	Indianapolis, IN	Knoxville, TN	\$3,469	\$200	\$36.44	\$0.93	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$225	\$34.19	\$0.87	2
	Des Moines, IA	Los Angeles, CA	\$5,215	\$656	\$58.30	\$1.48	3
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,559	\$395	\$39.26	\$1.07	3
	Toledo, OH	Huntsville, AL	\$3,687	\$295	\$39.55	\$1.08	3
	Indianapolis, IN	Raleigh, NC	\$4,756	\$419	\$51.39	\$1.40	4
	Indianapolis, IN	Huntsville, AL	\$3,379	\$200	\$35.54	\$0.97	3
	Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$362	\$40.82	\$1.11	4
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$308	\$39.58	\$1.08	0
	Wichita, KS	Galveston-Houston, TX	\$3,471	\$240	\$36.85	\$1.00	-8
	Chicago, IL	Albany, NY	\$3,950	\$390	\$43.10	\$1.17	5
	Grand Forks, ND	Portland, OR	\$5,159	\$532	\$56.51	\$1.54	0
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$554	\$65.92	\$1.79	0
	Northwest KS	Portland, OR	\$5,260	\$576	\$57.95	\$1.58	4
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$648	\$56.09	\$1.42	4
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$593	\$55.15	\$1.40	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$362	\$33.50	\$0.85	2
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$346	\$38.29	\$0.97	5
	Des Moines, IA	Amarillo, TX	\$3,590	\$283	\$38.46	\$0.98	2
	Minneapolis, MN	Tacoma, WA	\$5,000	\$643	\$56.03	\$1.42	4
	Council Bluffs, IA	Stockton, CA	\$4,400	\$665	\$50.29	\$1.28	4
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,520	\$593	\$60.71	\$1.65	3
	Minneapolis, MN	Portland, OR	\$5,530	\$648	\$61.35	\$1.67	3
	Fargo, ND	Tacoma, WA	\$5,430	\$527	\$59.16	\$1.61	3
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$418	\$45.61	\$1.24	5
	Toledo, OH	Huntsville, AL	\$2,862	\$295	\$31.35	\$0.85	4
Grand Island, NE	Portland, OR	\$5,110	\$589	\$56.60	\$1.54	3	

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

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

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

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

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

Table 8

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

Effective date: 9/1/2014

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel	Tariff plus surcharge per:		Percent change Y/Y <sup>4</sup>
				surcharge per car <sup>2</sup>	metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$6,460	\$563	\$71.76	\$1.95	1
	OK	Cuautitlan, EM	\$6,315	\$684	\$71.50	\$1.94	-5
	KS	Guadalajara, JA	\$6,899	\$660	\$77.24	\$2.10	-16
	TX	Salinas Victoria, NL	\$3,798	\$258	\$41.44	\$1.13	30
Corn	IA	Guadalajara, JA	\$7,974	\$777	\$89.41	\$2.27	3
	SD	Celaya, GJ	\$7,656	\$736	\$85.75	\$2.18	4
	NE	Queretaro, QA	\$7,353	\$690	\$82.18	\$2.09	3
	SD	Salinas Victoria, NL	\$5,880	\$560	\$65.80	\$1.67	3
	MO	Tlalnepantla, EM	\$6,712	\$670	\$75.43	\$1.91	2
	SD	Torreon, CU	\$6,722	\$617	\$74.98	\$1.90	3
Soybeans	MO	Bojay (Tula), HG	\$7,916	\$655	\$87.58	\$2.38	4
	NE	Guadalajara, JA	\$8,447	\$749	\$93.96	\$2.55	4
	IA	El Castillo, JA	\$8,855	\$732	\$97.95	\$2.66	3
	KS	Torreon, CU	\$6,864	\$465	\$74.88	\$2.04	3
Sorghum	TX	Guadalajara, JA	\$6,953	\$479	\$75.94	\$1.93	7
	NE	Celaya, GJ	\$7,212	\$669	\$80.51	\$2.04	3
	KS	Queretaro, QA	\$6,650	\$420	\$72.24	\$1.83	-2
	NE	Salinas Victoria, NL	\$5,368	\$492	\$59.87	\$1.52	-1
	NE	Torreon, CU	\$6,243	\$549	\$69.40	\$1.76	1

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

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

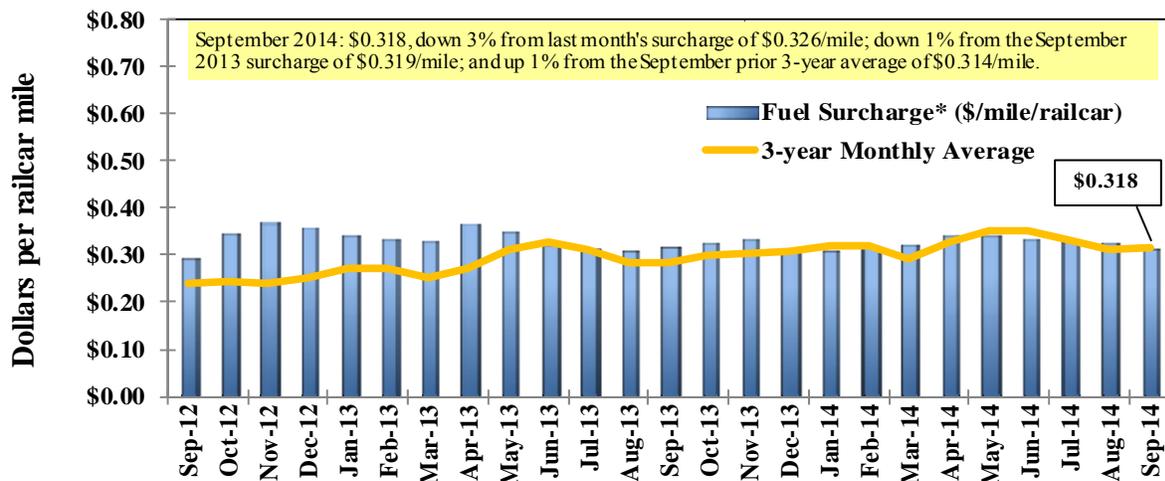
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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.

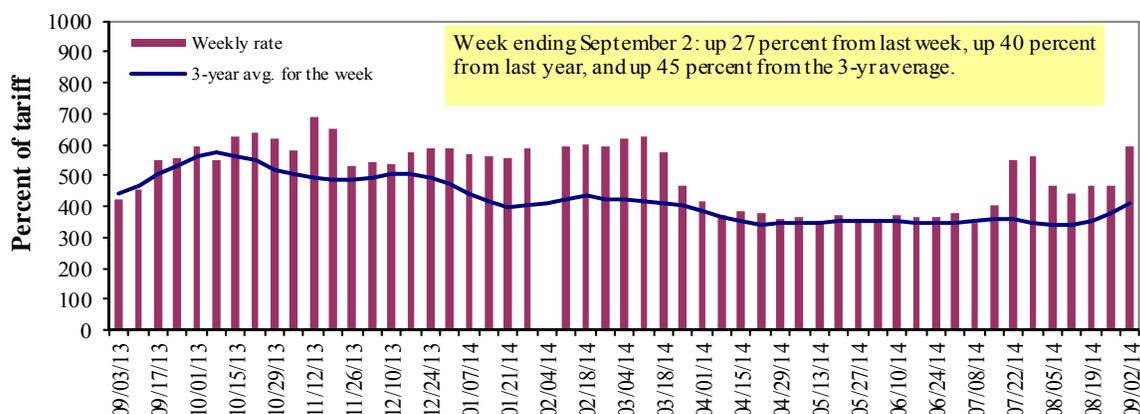
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	9/2/2014	555	585	596	583	575	575	583
	8/26/2014	525	499	469	456	494	494	453
<b>\$/ton</b>	9/2/2014	34.35	31.12	27.65	23.26	26.97	23.23	18.31
	8/26/2014	32.50	26.55	21.76	18.19	23.17	19.96	14.22
<b>Current week % change from the same week:</b>								
	Last year	33	39	40	51	33	33	50
	3-year avg. <sup>2</sup>	30	41	45	52	40	40	52
<b>Rate<sup>1</sup></b>	October	763	773	773	763	800	800	759
	December	-	-	595	495	555	555	443

<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

### 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

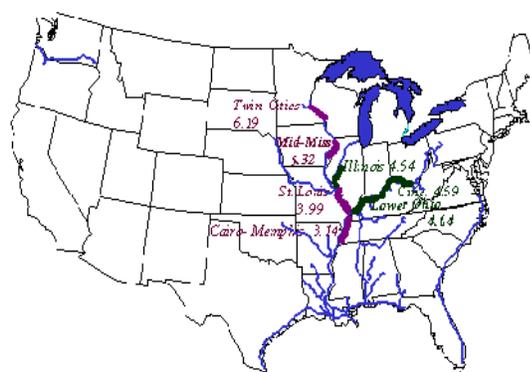
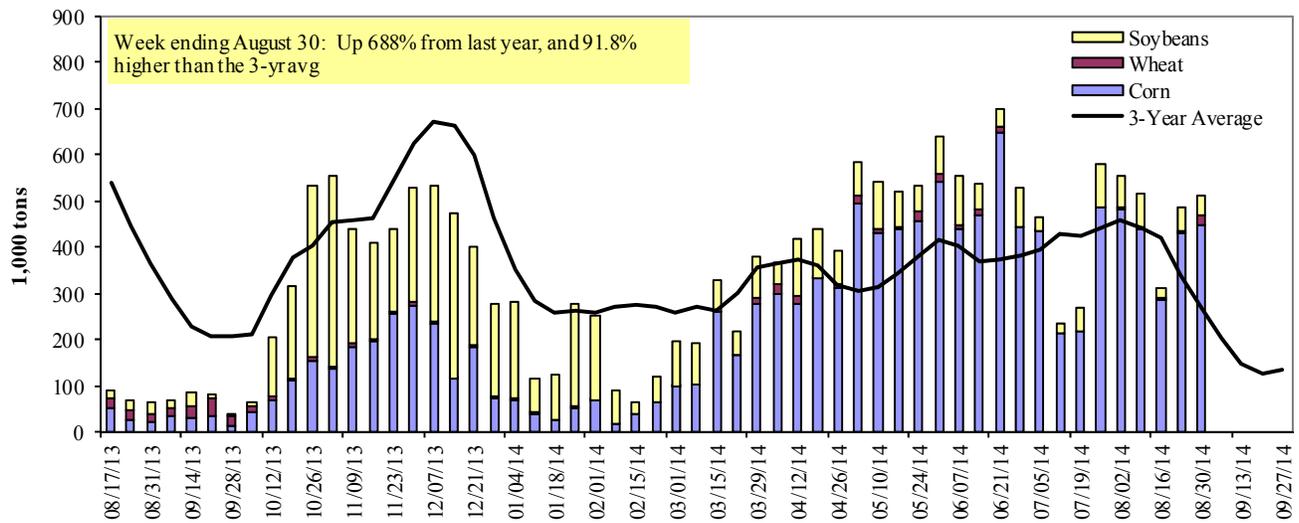


Figure 10

**Barge Movements on the Mississippi 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 8/30/2014	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	119	16	9	0	144
Winfield, MO (L25)	318	16	28	0	361
Alton, IL (L26)	430	19	34	0	483
Granite City, IL (L27)	446	22	44	2	513
<b>Illinois River (L8)</b>	32	0	0	0	32
<b>Ohio River (L52)</b>	72	44	17	4	136
<b>Arkansas River (L1)</b>	6	50	6	4	66
Weekly total - 2014	524	117	66	9	715
Weekly total - 2013	53	54	32	0	139
2014 YTD <sup>1</sup>	15,881	1,896	5,207	143	23,127
2013 YTD	5,289	3,350	4,526	139	13,305
2014 as % of 2013 YTD	300	57	115	103	174
Last 4 weeks as % of 2013 <sup>2</sup>	772	57	115	227	230
Total 2013	9,504	4,111	10,065	255	23,935

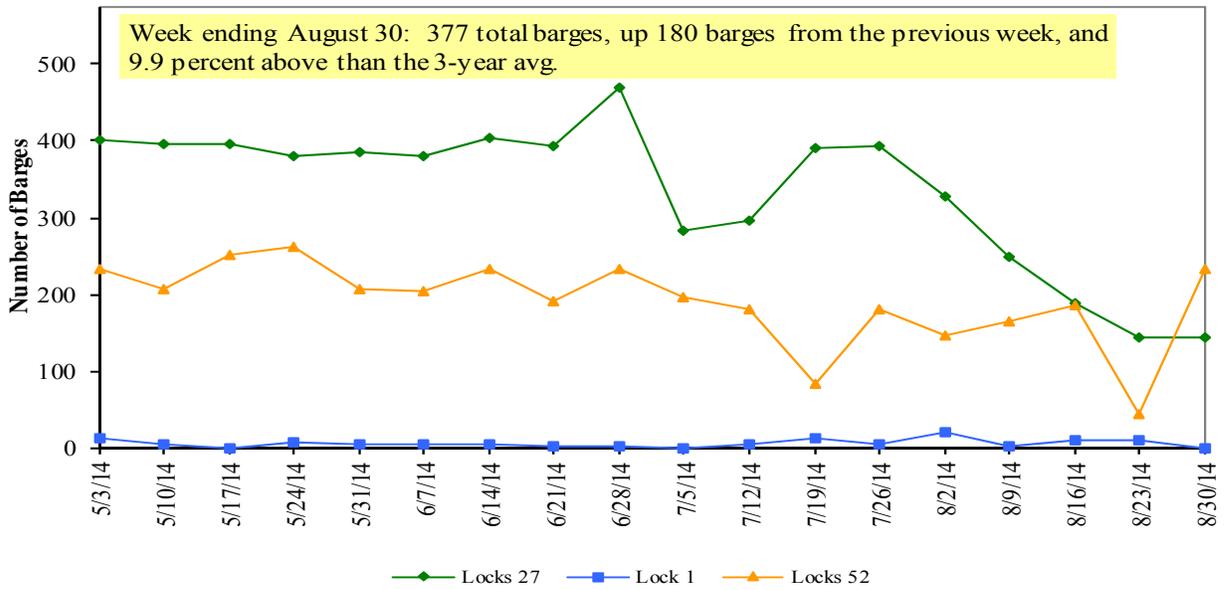
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2013.

Note: Total may not add exactly, due to rounding

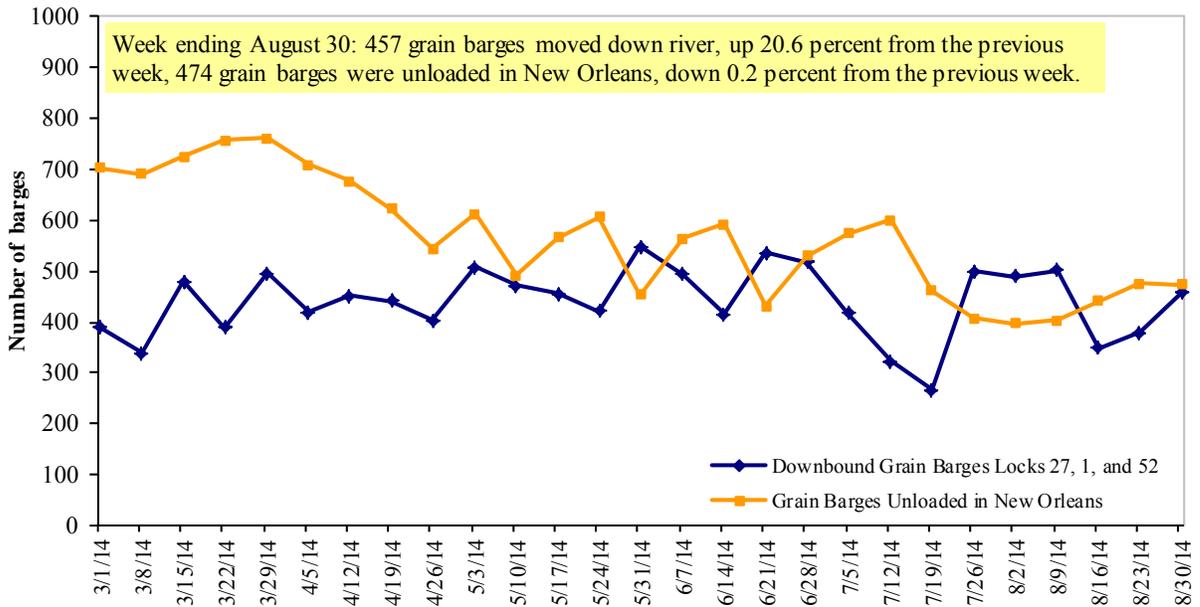
Source: U.S. Army Corps of Engineers

**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 9/1/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.842	-0.013	-0.151
	New England	3.944	-0.011	-0.143
	Central Atlantic	3.925	-0.010	-0.130
	Lower Atlantic	3.756	-0.015	-0.174
II	Midwest <sup>2</sup>	3.752	-0.011	-0.215
III	Gulf Coast <sup>3</sup>	3.720	-0.012	-0.177
IV	Rocky Mountain	3.868	-0.007	-0.069
V	West Coast	4.030	0.020	-0.098
	West Coast less California	3.973	0.052	-0.059
	California	4.079	-0.005	-0.131
Total	U.S.	3.814	-0.007	-0.167

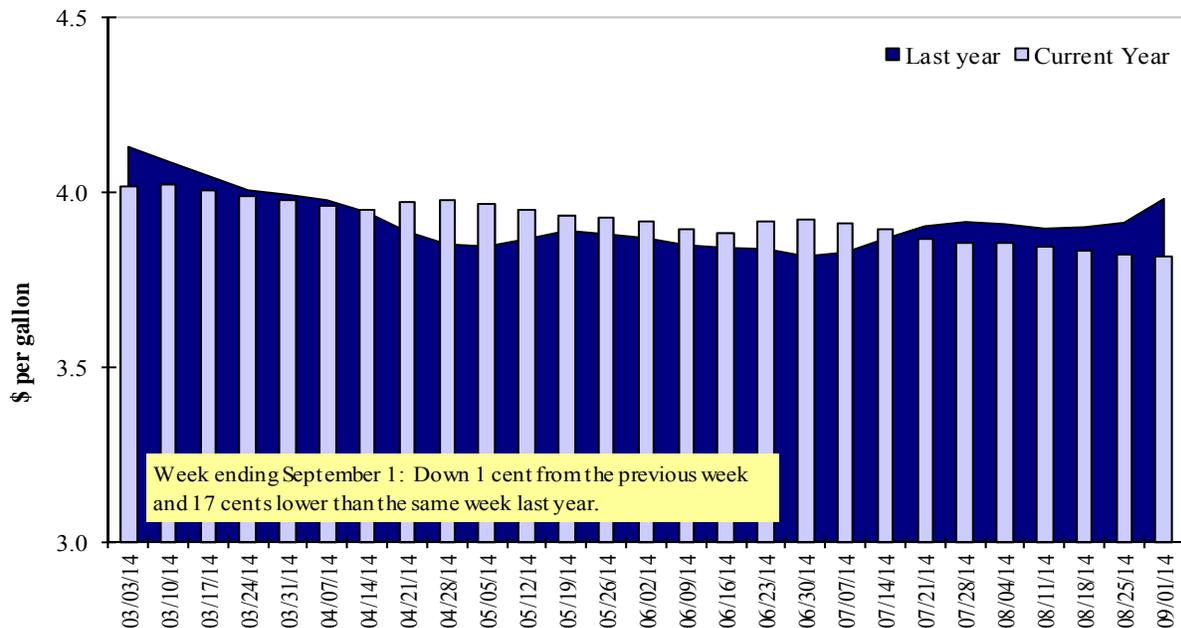
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
<b>Export Balances<sup>1</sup></b>									
8/21/2014	1,657	1,130	1,863	1,052	99	5,801	2,811	1,586	10,198
This week year ago	1,684	2,749	1,474	1,154	116	7,177	1,485	1,016	9,678
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2013/14 YTD	1,830	1,091	1,679	776	90	5,466	45,845	44,442	95,753
2012/13 YTD	3,523	2,650	1,069	684	52	7,978	17,608	36,160	61,746
YTD 2013/14 as % of 2012/13	52	41	157	113	173	69	260	123	155
Last 4 wks as % of same period 2012/13	103	44	131	92	104	84	291	187	127
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254

<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 08/21/2014	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2014/15	2013/14	2012/13		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	1,877	11,605	7,301	59	7,000
Mexico	2,688	10,724	4,503	138	4,370
China	15	2,773	2,573	8	2,450
Korea	127	4,744	419	1,032	416
Taiwan	54	2,057	591	248	512
<b>Top 5 Importers</b>	<b>4,761</b>	<b>31,902</b>	<b>15,386</b>	<b>107</b>	<b>14,748</b>
<b>Total US corn export sales</b>	<b>9,949</b>	<b>48,656</b>	<b>19,093</b>	<b>155</b>	<b>18,690</b>
% of Projected	23%	100%	102%		
Change from prior week	<b>696</b>	<b>(62)</b>	<b>(15)</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	<b>48%</b>	<b>66%</b>	<b>81%</b>		<b>79%</b>
<b>USDA forecast, August 2014</b>	<b>43,820</b>	<b>48,770</b>	<b>18,690</b>	<b>161</b>	
<b>Corn Use for Ethanol USDA forecast, August 2014</b>	<b>128,905</b>	<b>130,048</b>	<b>118,059</b>	<b>10</b>	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 08/21/2014	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2014/15 Next MY	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	12,036	27,960	21,647	29	21,522
Mexico	764	3,286	2,604	26	2,565
Japan	329	1,914	1,869	2	1,751
Indonesia	237	2,516	1,756	43	1,682
Taiwan	219	1,335	1,287	4	1,120
<b>Top 5 importers</b>	<b>13,586</b>	<b>37,011</b>	<b>29,162</b>	<b>27</b>	<b>28,641</b>
<b>Total US soybean export sales</b>	<b>20,805</b>	<b>46,028</b>	<b>37,176</b>	<b>24</b>	<b>35,910</b>
% of Projected	46%	103%	104%		
Change from prior week	1,291	(63)	(3)		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>65%</b>	<b>80%</b>	<b>78%</b>		
<b>USDA forecast, August 2014</b>	<b>45,590</b>	<b>44,630</b>	<b>35,910</b>	<b>24</b>	

(n) indicates negative number.

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

Table 15

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

Week Ending 08/21/2014	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2013/14
	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	192	3,756	(95)	4,213
Brazil	1,178	1,871	(37)	4,211
Mexico	1,325	1,458	(9)	2,940
Japan	1,226	1,163	5	2,674
Nigeria	1,156	1,034	12	2,629
Philippines	805	671	20	2,013
Korea	662	416	59	1,287
Indonesia	286	280	2	1,076
Taiwan	415	366	14	980
Colombia	267	368	(27)	783
<b>Top 10 importers</b>	<b>7,513</b>	<b>11,384</b>	<b>(34)</b>	<b>22,808</b>
<b>Total US wheat export sales</b>	<b>11,267</b>	<b>15,154</b>	<b>(26)</b>	<b>32,010</b>
% of Projected	45%	47%		
Change from prior week	396	551		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>67%</b>	<b>75%</b>		<b>71%</b>
<b>USDA forecast, August 2014</b>	<b>25,170</b>	<b>32,010</b>	<b>(21)</b>	

(n) indicates negative number.

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

Table 16

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

Port regions	Week ending 08/28/14	Previous Week <sup>1</sup>	Current Week as % of Previous	2014 YTD <sup>1</sup>	2013 YTD <sup>1</sup>	2014 YTD as % of 2013 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2013
							2013	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	347	251	138	8,643	7,627	113	101	85	11,585
Corn	145	312	47	6,744	1,372	492	1,820	339	2,973
Soybeans	0	15	0	4,507	3,765	120	572	9	9,090
<b>Total</b>	<b>492</b>	<b>578</b>	<b>85</b>	<b>19,894</b>	<b>12,763</b>	<b>156</b>	<b>179</b>	<b>117</b>	<b>23,647</b>
<b>Mississippi Gulf</b>									
Wheat	124	167	75	3,490	6,855	51	47	87	9,711
Corn	445	555	80	22,030	7,663	287	218	150	14,828
Soybeans	14	119	11	10,660	7,749	138	80	31	21,462
<b>Total</b>	<b>583</b>	<b>840</b>	<b>69</b>	<b>36,180</b>	<b>22,267</b>	<b>162</b>	<b>117</b>	<b>105</b>	<b>46,002</b>
<b>Texas Gulf</b>									
Wheat	212	104	205	4,652	6,247	74	59	87	9,039
Corn	40	0	n/a	438	157	278	734	470	255
Soybeans	0	0	n/a	258	122	211	n/a	0	908
<b>Total</b>	<b>252</b>	<b>104</b>	<b>243</b>	<b>5,347</b>	<b>6,527</b>	<b>82</b>	<b>65</b>	<b>95</b>	<b>10,203</b>
<b>Interior</b>									
Wheat	60	76	79	930	699	133	399	238	1,244
Corn	162	158	102	3,813	1,807	211	77	134	3,943
Soybeans	22	14	163	2,291	1,805	127	293	55	3,212
<b>Total</b>	<b>244</b>	<b>248</b>	<b>98</b>	<b>7,034</b>	<b>4,312</b>	<b>163</b>	<b>201</b>	<b>124</b>	<b>8,399</b>
<b>Great Lakes</b>									
Wheat	31	0	n/a	358	503	71	245	204	884
Corn	11	50	22	172	0	n/a	n/a	310	0
Soybeans	0	0	n/a	51	22	229	n/a	0	699
<b>Total</b>	<b>42</b>	<b>50</b>	<b>83</b>	<b>581</b>	<b>525</b>	<b>111</b>	<b>426</b>	<b>236</b>	<b>1,583</b>
<b>Atlantic</b>									
Wheat	40	13	318	369	513	72	236	403	645
Corn	32	4	760	575	2	n/a	n/a	1,650	242
Soybeans	1	1	n/a	998	693	144	970	17	1,652
<b>Total</b>	<b>73</b>	<b>18</b>	<b>413</b>	<b>1,943</b>	<b>1,208</b>	<b>161</b>	<b>399</b>	<b>381</b>	<b>2,540</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	815	610	133	18,442	22,445	82	77	95	33,108
Corn	835	1,080	77	33,771	11,001	307	293	179	22,241
Soybeans	36	148	24	18,765	14,157	133	108	32	37,024
<b>Total</b>	<b>1,686</b>	<b>1,838</b>	<b>92</b>	<b>70,978</b>	<b>47,603</b>	<b>149</b>	<b>133</b>	<b>113</b>	<b>92,373</b>

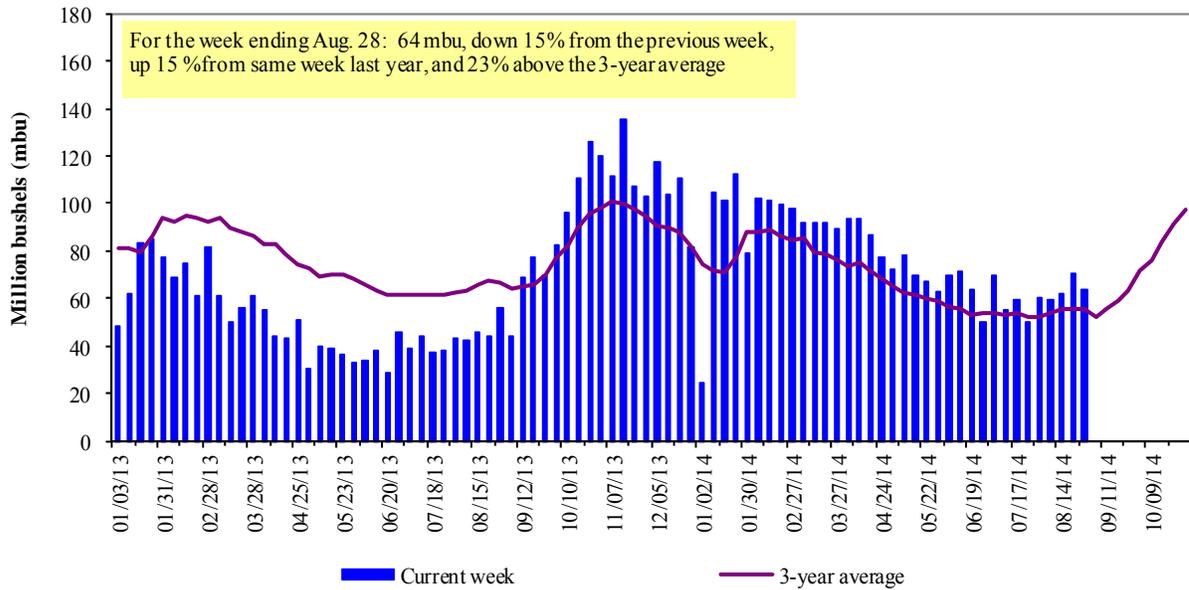
<sup>1</sup> Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2013.

Figure 14

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

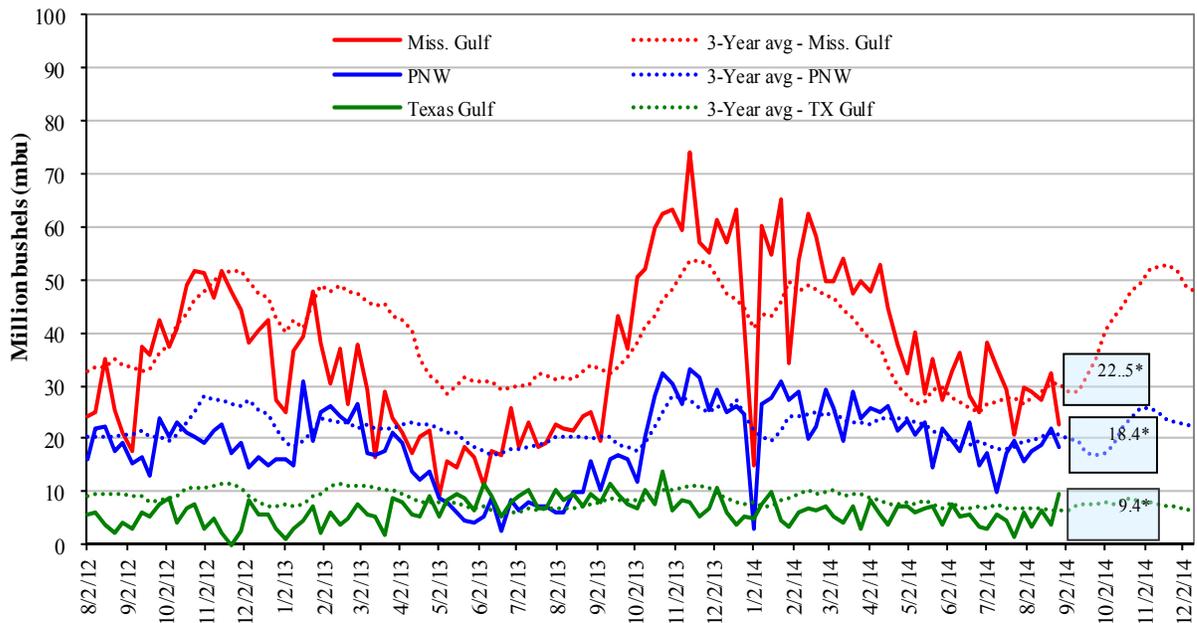


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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>Aug 28 : % change from</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 30	up 146	down 12	down 16
Last year (same week)	down 9	down 1	down 7	up 16
3-yr av. (4-wk mov. av.)	down 14	up 58	down 0.4	up 6

# Ocean Transportation

Table 17

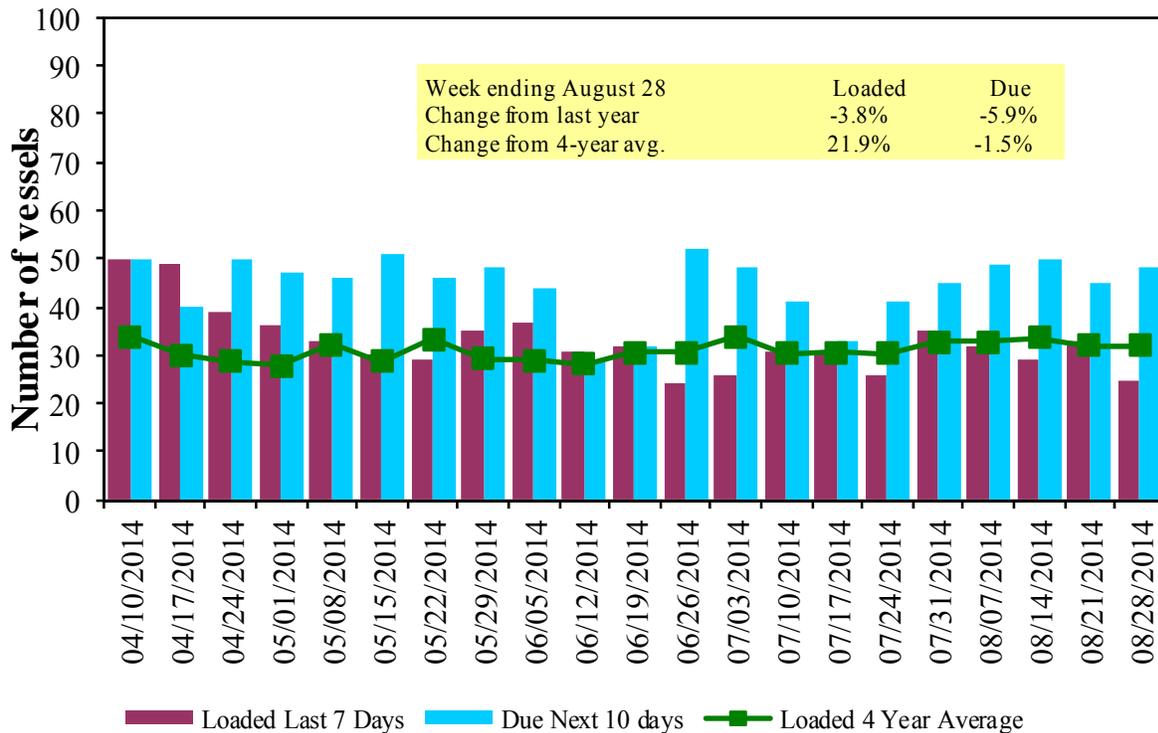
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/28/2014	28	25	48	13	n/a
8/21/2014	23	33	45	15	n/a
2013 range	(16..60)	(20..56)	(31..81)	(0..24)	n/a
2013 avg	32	33	51	12	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

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

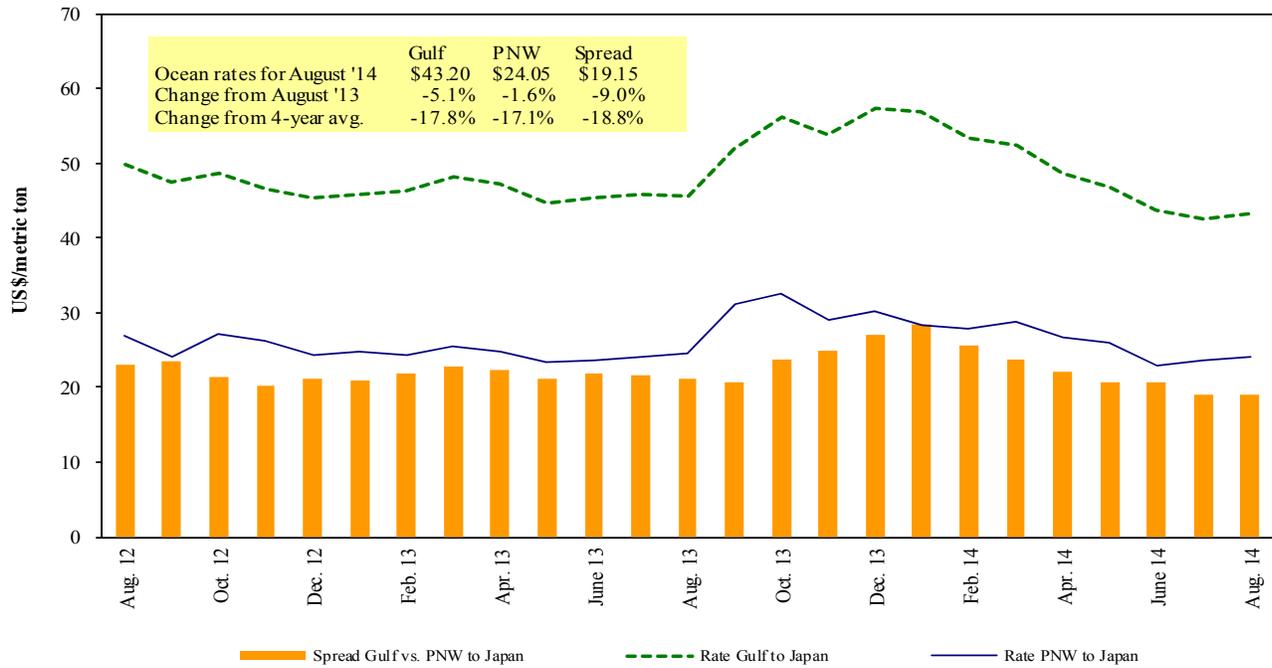


Source: Transportation & Marketing Programs/AMS/USDA

<sup>1</sup>U.S. Gulf includes Mississippi, Texas, and East Gulf

Figure 17

**Grain Vessel Rates, U.S. to Japan**



Data Source: O'Neil Commodity Consulting

Table 18

**Ocean Freight Rates For Selected Shipments, Week Ending 08/30/2014**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 1/10	57,000	45.50
U.S. Gulf	China	Grain	Aug 1/10	50,000	49.25
U.S. Gulf	Djibouti <sup>1</sup>	Sorghum	Sep 10/24	24,000	106.41
U.S. Gulf	Mexico	Heavy Grain	Aug 2/6	33,000	11.25
PNW	Philippines	Grain	Aug 1/15	65,000	22.50
Brazil	China	Heavy Grain	Sep 1/10	60,000	34.00
Brazil	China	Grain	Aug 20/30	60,000	31.50
Brazil	China	Grain	Aug 10/31	60,000	33.25
Brazil	China	Grain	Aug 1/30	65,000	35.50
Brazil	China	Heavy Grain	Aug 11/18	60,000	31.00
Brazil	China	Heavy Grain	Aug 1/5	60,000	40.00
Germany	Iran	Wheat	Aug 20/Sep 8	65,000	35.00
River Plate	China	Heavy Grain	Aug 1/31	60,000	44.50

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

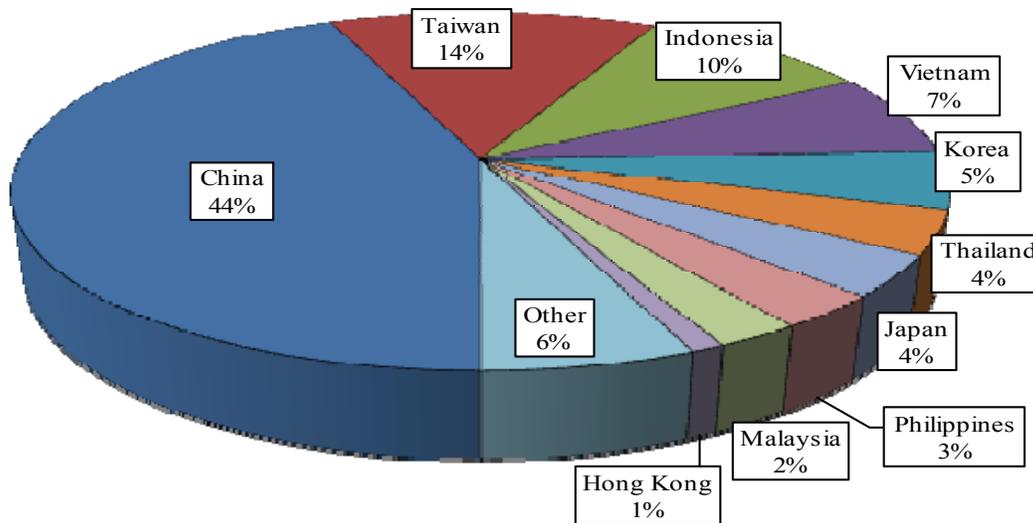
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, 2013**

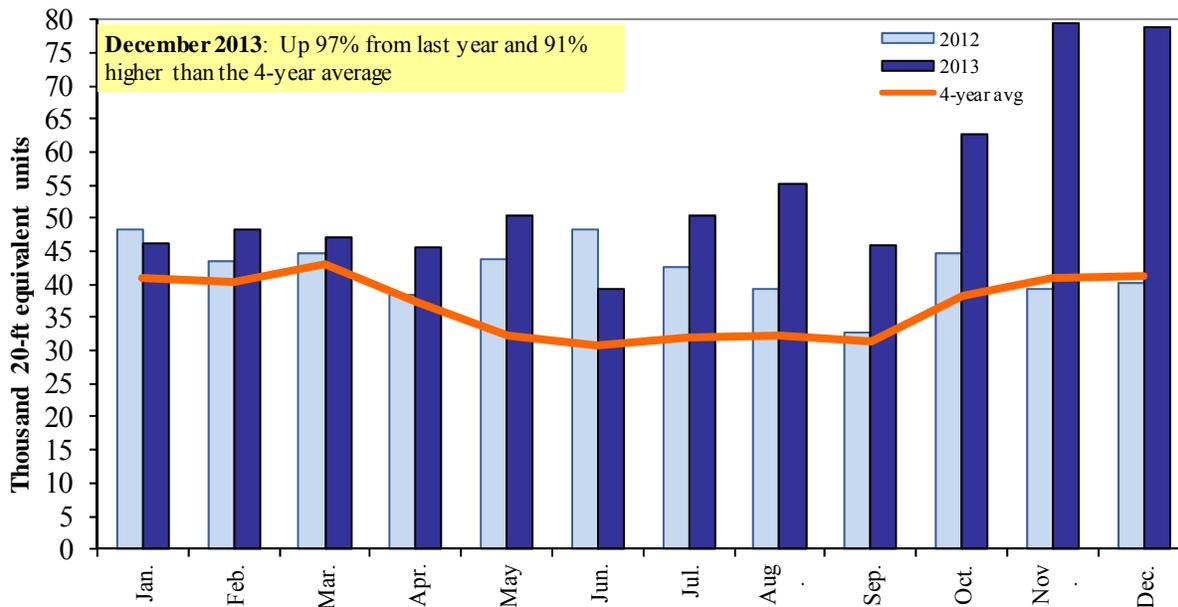


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

# Contacts and Links

## Coordinators

Surajudeen (Deen) Olowolayemo	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
Pierre Bahizi	<a href="mailto:pierre.bahizi@ams.usda.gov">pierre.bahizi@ams.usda.gov</a>	(202) 690 - 0992
Adam Sparger	<a href="mailto:adam.sparger@ams.usda.gov">adam.sparger@ams.usda.gov</a>	(202) 205 - 8701

## Weekly Highlight Editors

Marina Denicoff	<a href="mailto:marina.denicoff@ams.usda.gov">marina.denicoff@ams.usda.gov</a>	(202) 690 - 3244
Surajudeen (Deen) Olowolayemo	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
April Taylor	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 295 - 7374
Nicholas Marathon	<a href="mailto:nick.marathon@ams.usda.gov">nick.marathon@ams.usda.gov</a>	(202) 690 - 4430

## Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
-------------------------------	--	------------------

## Rail Transportation

Marvin Prater	<a href="mailto:marvin.prater@ams.usda.gov">marvin.prater@ams.usda.gov</a>	(540) 361 - 1147
Johnny Hill	<a href="mailto:johnny.hill@ams.usda.gov">johnny.hill@ams.usda.gov</a>	(202) 690 - 3295
Adam Sparger	<a href="mailto:adam.sparger@ams.usda.gov">adam.sparger@ams.usda.gov</a>	(202) 205 - 8701

## Barge Transportation

Nicholas Marathon	<a href="mailto:nick.marathon@ams.usda.gov">nick.marathon@ams.usda.gov</a>	(202) 690 - 4430
April Taylor	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 295 - 7374

## Truck Transportation

April Taylor	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 295 - 7374
--------------	--	------------------

## Grain Exports

Johnny Hill	<a href="mailto:johnny.hill@ams.usda.gov">johnny.hill@ams.usda.gov</a>	(202) 690 - 3295
Marina Denicoff	<a href="mailto:marina.denicoff@ams.usda.gov">marina.denicoff@ams.usda.gov</a>	(202) 690 - 3244

## Ocean Transportation

Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	<a href="mailto:surajudeen.olowolayemo@ams.usda.gov">surajudeen.olowolayemo@ams.usda.gov</a>	(202) 720 - 0119
April Taylor (Container movements)	<a href="mailto:april.taylor@ams.usda.gov">april.taylor@ams.usda.gov</a>	(202) 295 - 7374

**Subscription Information:** Send relevant information to [GTRContactUs@ams.usda.gov](mailto:GTRContactUs@ams.usda.gov) for an electronic copy (*printed copies are also available upon request*).

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