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Contents

Article/  
Calendar

Grain  
Transportation  
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean  
Rate Advisory

Data Links

Specialists

Subscription  
Information

-----  
The next  
release is  
October 11, 2012



# Grain Transportation Report

A weekly publication of the  
Transportation and Marketing Programs/Transportation Services Division  
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**PNW Export Grain Strike Temporarily Averted**

The International Longshore and Warehouse Union (ILWU) and six export grain terminals in the Pacific Northwest (PNW) represented by the Pacific Northwest Grain Handlers Association are continuing contract negotiations at least through mid-October, after the contract expired September 30. Terminals and shippers were bracing for a potential strike on October 1; some have rerouted traffic and rescheduled deliveries. Roughly half of the grain exported through the region is handled by the six terminals involved in the labor negotiation. The peak grain export season in the PNW begins in October and runs through early December. Grain operations in the region are continuing as normal.

**Weekly Grain Inspections Highest Since March**

For the week ending September 27, **total inspections of grain** (wheat, corn, and soybeans) for export from major U.S. ports reached 2.32 million metric tons (mmt), up 49 percent from the previous week and 40 percent higher than this time last year. Total grain inspections were the highest since March 8 (2.51 mmt). The jump in inspections was caused mainly by greater shipments of soybeans, destined primarily to China. Mississippi Gulf soybean inspections were more than double those of the prior week. Wheat inspections (.667 mmt) also increased from the past week, but corn inspections (.513 mmt) continued to decrease. Although down from the previous week, corn inspections were 13 percent above the previous four-week running average.

**More Than Half of Nation's Corn and 41 Percent of Soybeans Harvested; Barge Rates Increase**

As of September 30, the top three corn-producing States—Iowa, Illinois, and Nebraska—were 38-48 percentage points ahead of their average harvest pace, and Minnesota is 48 points ahead of its average. The top 18 corn-producing States are 54 percent harvested—34 points ahead of the average pace. The top 18 soybean-producing States have harvested 41 percent of the soybean crop, 22 points ahead of average pace. The Minnesota soybean harvest is 76 percent complete, 53 points ahead of average pace. The early harvest in Minnesota has increased Minneapolis-St. Paul barge rates to a year high 697 percent of tariff (\$43.14 per ton).

**Snapshots by Sector**

**Rail**

U.S. railroads originated 19,938 **carloads of grain** during the week ending September 22, up 1 percent from last week, 10 percent from last year, and 6 percent lower than the 3-year average.

During the week ending September 27, average October non-shuttle **secondary railcar bids/offers per car** were \$17 above tariff, the same as last week, and \$28 more than last year. Average shuttle bids/offers were \$289.50 above tariff, \$96 less than last week, and \$106 more than last year.

**Ocean**

During the week ending September 27, 33 **ocean-going grain vessels** were loaded in the Gulf, down 11 percent from the same period last year. Forty-seven vessels are expected to be loaded within the next 10 days, 11 percent less than the same period last year.

During the week ending September 28, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$47 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.

**Barge**

During the week ending September 29, **barge grain movements** totaled 460,074 tons, 147 percent higher than the previous week and 38 percent higher than the same period last year. During the previous week, Mississippi River Locks 27 was closed for several days, and the current week reflects the backlog of traffic resulting from the closure.

During the week ending September 29, 302 grain barges **moved down river**, up 144 percent from last week, and 686 grain barges were **unloaded in New Orleans**, up 6 percent from the previous week.

**Fuel**

During the week ending October 1, U.S. average **diesel fuel prices** dropped 1 cent to \$4.08 per gallon—33 cents higher than the same week last year.

# Feature Article/Calendar

## Drought Decreases Barge Capacity

Widespread drought has reduced water levels on the Mississippi River, the Ohio River, and their tributaries. The low water conditions reduce the cargo capacity of an individual barge. During the last 4 weeks, data from the U.S. Army Corps of Engineers (Corps) indicates that loaded corn barges on the Upper Mississippi River contained an average 53,536 bushels per barge, which is a 4 percent reduction from the normal capacity of 55,500 bushels per barge. Usually barges on the Lower Mississippi River can be loaded to higher capacities because the lower river is deeper. In recent conversations, staff from USDA's Grain Inspection, Packers and Stockyard Administration has roughly estimated that corn barges unloaded in New Orleans area currently are carrying cargo of about 54,000 bushels, which represents an 11 percent reduction from a normal year's grain barge capacity of about 60,000 bushels.

For first half of the year, St. Louis, MO, to New Orleans, LA, barge freight rates were below average. From July to mid-September, rates have gradually increased as a result of drought incurred barge costs and an early corn harvest. At St. Louis, rates moderated during the last half of September. Barge rates for locations north of St. Louis have been increasing as harvest activities intensify in the northern reaches of the river.

Due to persistent drought conditions through the summer, the Corps has been monitoring 15 river gage locations that are critical to navigation. As of October 3, five gages are currently at "action stage" (marked as yellow boxes on figure 1). When a gage is at the action stage, various federal agencies begin to implement actions to help improve navigational conditions, such as dredging, increasing reservoir releases, and establishing draft/tow restrictions. The five action stage areas are Vicksburg, MS; Greenville, MS; Memphis, TN; St. Louis, MO; and Herman, MO.

**Figure 1-Critical navigation gages used to monitor barge traffic during 2012 drought**

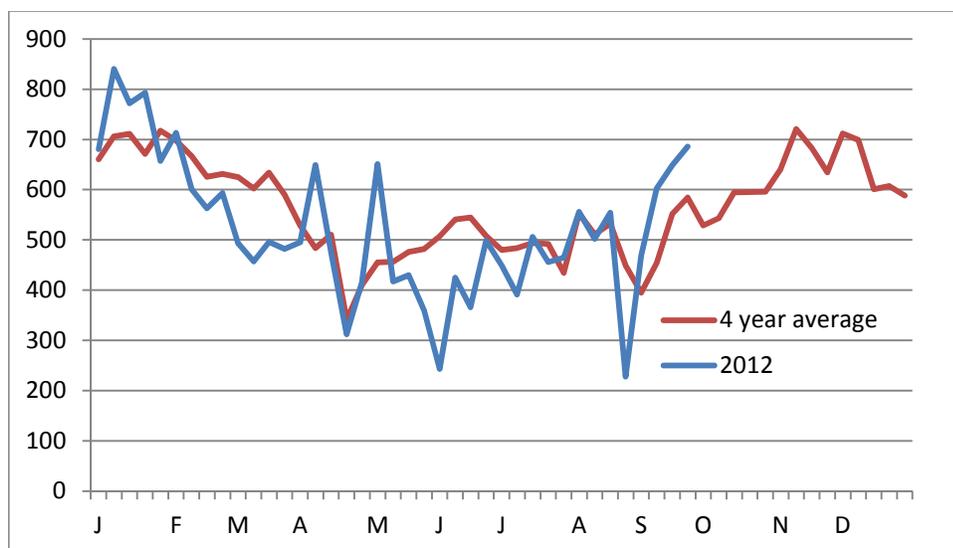


Source: U.S. Army Corps of Engineers

The low water has narrowed some channels to a few hundred feet in width where the usual navigable channel is 1,000 feet or wider. While most of the river is wide enough for two-way traffic, movements are slower than normal to maintain safe navigation. To help maintain navigation, the Corps and its contractors are dredging at eight different low water sites along the river. Some of the dredge sites are working entrance channels, whereas the 5 action sites are working the main navigation channel. One site, the port of Osceola, AR, has been closed since late August because its harbor channel is too shallow for barges to arrive or depart. Dredging work began there September 23 and is expected to last 2 weeks. Several sources indicate that there are 30 loaded grain barges waiting to leave Osceola once the dredging work is complete.

Table 1 shows the weekly number of barges unloaded at New Orleans. For the last three weeks, barge unloads have been above average. However, if we calculate a year-to-date annual weekly average, grain barge unloads at New Orleans are averaging 522 barges per week for the year. This is down from the 4-year average of 534 barges per week, and more significantly, the reduced per barge capacities can be a limiting factor in sourcing grain by barge for export in New Orleans. Year-to-date railcar deliveries of grain are only 34 percent of last year's comparable period. Last year, flooding on the Mississippi River increased rail deliveries to the Texas Gulf and Mississippi River. This year, rail deliveries to port are up only for overland routes to Mexico and the Pacific Northwest.

Table 1 – Weekly Grain Barge Unloads at New Orleans, 2012 and 4-year average



Source: Grain Inspections, Packers, and Stockyards Administration

Overall, year-to-date total grain inspections for export are 89 percent of last year's amount. The Corps is concerned that below normal precipitation is expected through the fall. The National Weather Service reports some improvement is expected for the Ohio, Middle Mississippi, and Lower Mississippi with the return of increased precipitation levels. A late season improvement in water levels could increase barge movements. Nevertheless, the winter forecast expects drought conditions to intensify for the western half of the country. [Nick.Marathon@ams.usda.gov](mailto:Nick.Marathon@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
10/03/12	274	233	220	352	210	170
09/26/12	274	227	216	338	210	170

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2  
**Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)**

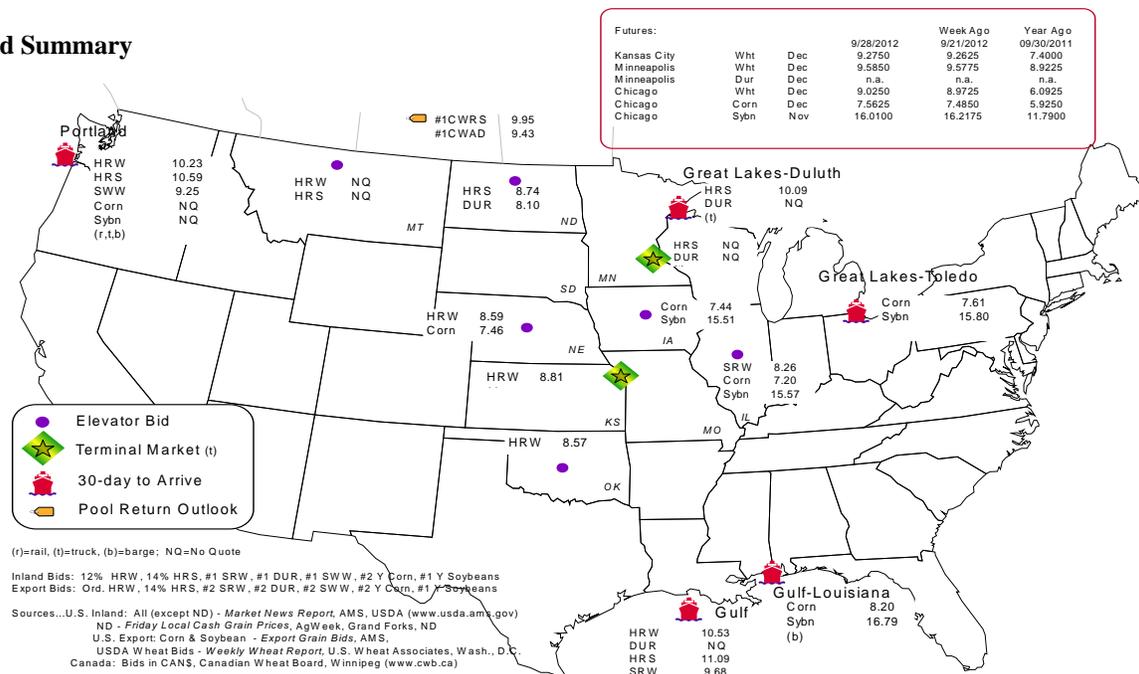
Commodity	Origin--Destination	9/28/2012	9/21/2012
Corn	IL--Gulf	-1.00	-0.57
Corn	NE--Gulf	-0.74	-0.75
Soybean	IA--Gulf	-1.28	-1.24
HRW	KS--Gulf	-1.72	-1.78
HRS	ND--Portland	-1.85	-1.99

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		Cross-Border	Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	East Gulf	
9/26/2012 <sup>p</sup>	506	1,007	372	4,321	261	6,467
9/19/2012 <sup>r</sup>	390	1,328	660	2,944	234	5,556
2012 YTD <sup>r</sup>	7,914	30,594	39,455	150,556	12,314	240,833
2011 YTD <sup>r</sup>	22,959	69,014	35,368	137,085	17,224	281,650
2012 YTD as % of 2011 YTD	34	44	112	110	71	86
Last 4 weeks as % of 2011 <sup>2</sup>	102	82	64	138	213	109
Last 4 weeks as % of 4-year avg. <sup>2</sup>	41	75	79	106	62	86
Total 2011	27,358	77,515	48,782	191,092	24,088	368,835
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933

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

<sup>2</sup> Compared with same 4-weeks in 2011 and prior 4-year average.

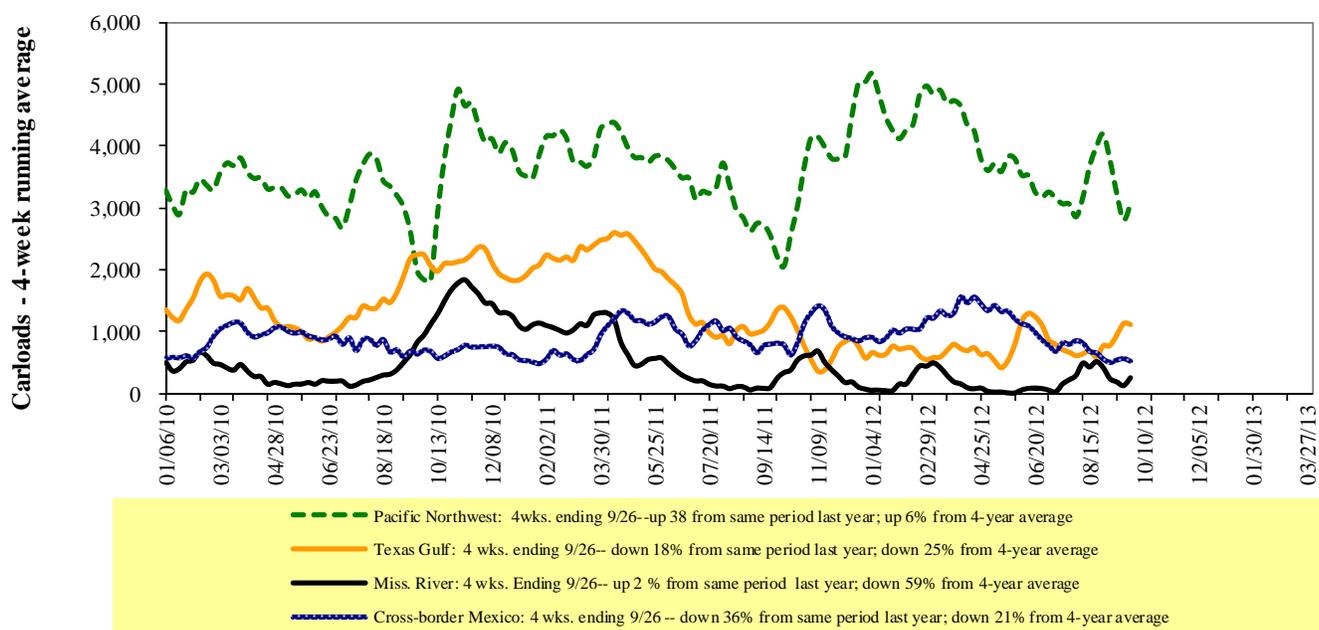
**YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available**

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

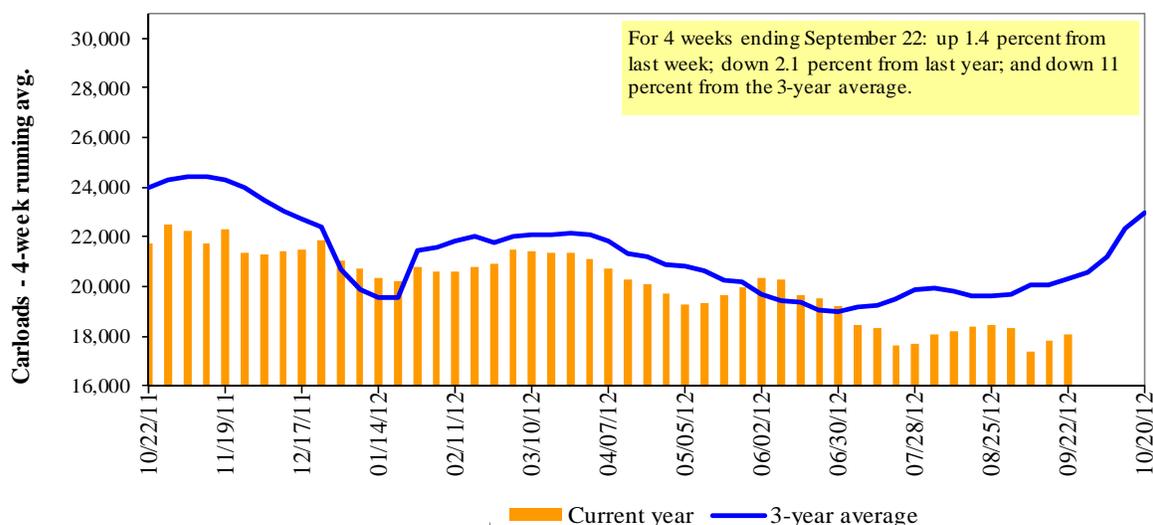
Table 4

**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
09/22/12	949	2,392	12,352	402	3,843	19,938	3,745	6,174
This week last year	1,158	2,278	9,084	1,139	4,551	18,210	4,025	4,447
2012 YTD	62,601	104,941	370,470	19,550	187,673	745,235	145,385	182,421
2011 YTD	67,505	108,876	398,980	26,079	220,106	821,546	144,409	191,786
2012 YTD as % of 2011 YTD	93	96	93	75	85	91	101	95
Last 4 weeks as % of 2011 <sup>1</sup>	90	109	108	75	78	98	102	114
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	64	91	98	92	73	88	107	107
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

<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							
	Oct-12	Oct-11	Nov-12	Nov-11	Dec-12	Dec-11	Jan-13	Jan-12
<b>9/27/2012</b>								
BNSF <sup>3</sup>								
COT grain units	0	no offer	0	no offer	0	no offer	no offer	no bids
COT grain single-car <sup>5</sup>	2..3	0..1	0..5	no bids	0..5	no bids	no offer	5
UP <sup>4</sup>								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	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.

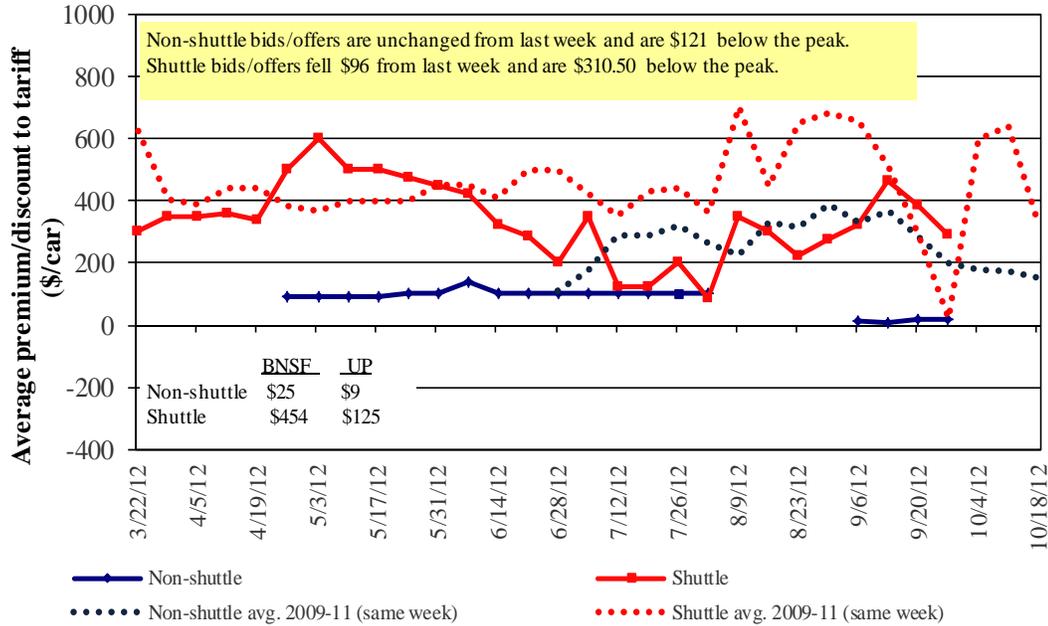
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 October 2012, Secondary Market**

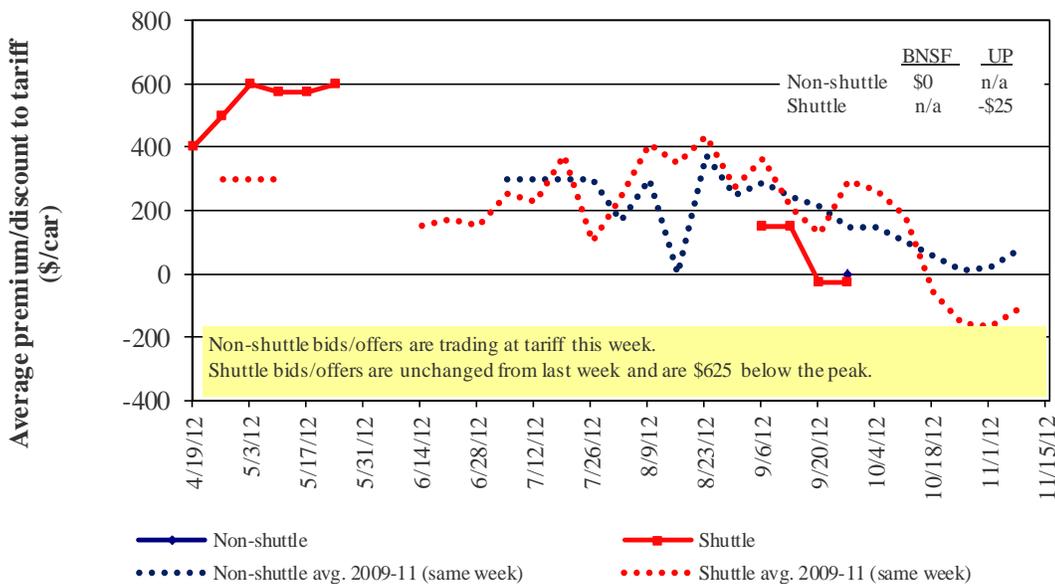


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in November 2012, Secondary Market**

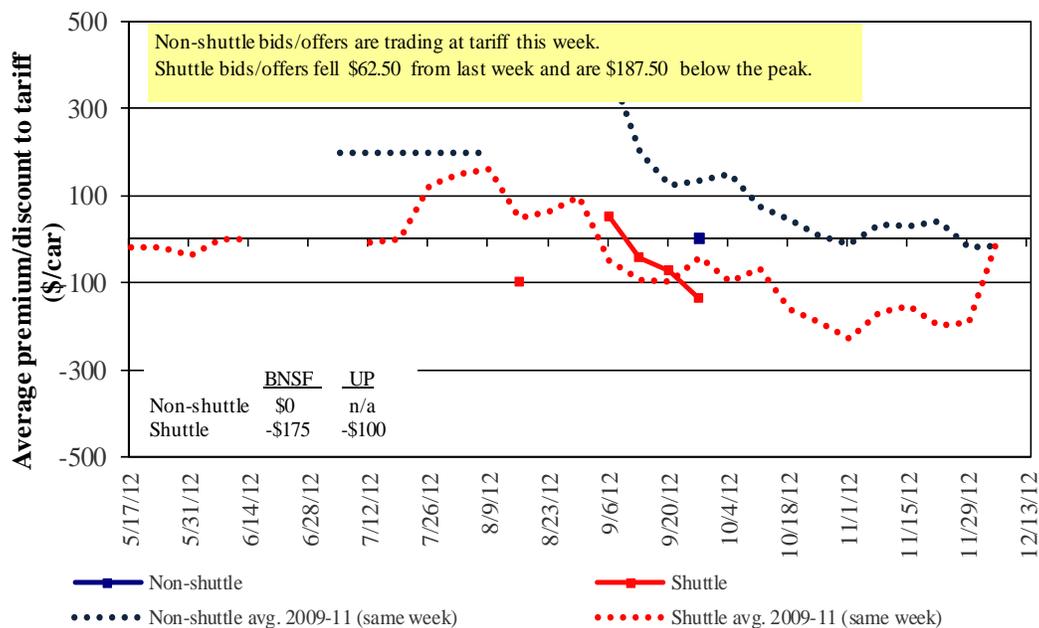


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

### Bids/Offers for Railcars to be Delivered in December 2012, 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					
	Oct-12	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13
<b>Non-shuttle</b>						
BNSF-GF	25	-	-	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	67	-	-	n/a	n/a	n/a
UP-Pool	9	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 2011	(11)	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	454	n/a	(175)	n/a	n/a	n/a
Change from last week	(4)	n/a	(75)	n/a	n/a	n/a
Change from same week 2011	200	n/a	n/a	n/a	n/a	n/a
UP-Pool	125	(25)	(100)	n/a	n/a	n/a
Change from last week	(188)	-	(50)	n/a	n/a	n/a
Change from same week 2011	12	138	75	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.

Table 7

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

Effective date:				Fuel	Tariff plus surcharge per:		Percent
10/1/2012	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe <sup>l</sup> <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$192	\$33.13	\$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,445	\$113	\$35.34	\$0.96	11
	Wichita, KS	Los Angeles, CA	\$6,026	\$581	\$65.61	\$1.79	6
	Wichita, KS	New Orleans, LA	\$3,645	\$338	\$39.56	\$1.08	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$477	\$60.08	\$1.64	3
	Northwest KS	Galveston-Houston, TX	\$3,912	\$371	\$42.53	\$1.16	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$516	\$45.95	\$1.25	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$382	\$34.68	\$0.94	2
	Toledo, OH	Raleigh, NC	\$4,508	\$433	\$49.07	\$1.34	14
	Des Moines, IA	Davenport, IA	\$2,006	\$81	\$20.72	\$0.56	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$325	\$42.15	\$1.15	15
	Indianapolis, IN	Knoxville, TN	\$3,354	\$209	\$35.38	\$0.96	18
	Des Moines, IA	Little Rock, AR	\$3,154	\$238	\$33.68	\$0.92	3
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$693	\$57.18	\$1.56	2
	Minneapolis, MN	New Orleans, LA	\$3,269	\$425	\$36.68	\$1.00	-3
	Toledo, OH	Huntsville, AL	\$3,575	\$308	\$38.56	\$1.05	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$436	\$49.79	\$1.36	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$209	\$34.51	\$0.94	3
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$382	\$39.54	\$1.08	6	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,481	\$334	\$37.89	\$1.03	8
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$260	\$38.67	\$1.05	15
	Chicago, IL	Albany, NY	\$3,771	\$406	\$41.48	\$1.13	4
	Grand Forks, ND	Portland, OR	\$4,963	\$578	\$55.02	\$1.50	6
	Grand Forks, ND	Galveston-Houston, TX	\$5,984	\$602	\$65.40	\$1.78	5
	Northwest KS	Portland, OR	\$4,793	\$608	\$53.63	\$1.46	2
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$703	\$54.65	\$1.49	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$644	\$53.67	\$1.46	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,857	\$382	\$32.17	\$0.88	0
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$375	\$36.60	\$1.00	1
	Des Moines, IA	Amarillo, TX	\$3,430	\$299	\$37.03	\$1.01	0
	Minneapolis, MN	Tacoma, WA	\$4,800	\$698	\$54.59	\$1.49	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$722	\$48.87	\$1.33	1
	Sioux Falls, SD	Tacoma, WA	\$5,340	\$644	\$59.43	\$1.62	6
	Minneapolis, MN	Portland, OR	\$5,330	\$703	\$59.91	\$1.63	6
	Fargo, ND	Tacoma, WA	\$5,230	\$573	\$57.62	\$1.57	6
	Council Bluffs, IA	New Orleans, LA	\$3,870	\$441	\$42.81	\$1.17	4
	Toledo, OH	Huntsville, AL	\$2,750	\$308	\$30.36	\$0.83	3
Grand Island, NE	Portland, OR	\$5,195	\$622	\$57.77	\$1.57	14	

<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**

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	\$7,741	\$611	\$85.34	\$2.32	4
	OK	Cuautitlan, EM	\$6,837	\$742	\$77.44	\$2.11	5
	KS	Guadalajara, JA	\$7,444	\$717	\$83.39	\$2.27	1
	TX	Salinas Victoria, NL	\$3,743	\$280	\$41.10	\$1.12	3
Corn	IA	Guadalajara, JA	\$7,699	\$843	\$87.28	\$2.21	3
	SD	Penjamo, GJ	\$7,776	\$800	\$87.62	\$2.22	7
	NE	Queretaro, QA	\$7,153	\$749	\$80.74	\$2.05	2
	SD	Salinas Victoria, NL	\$5,700	\$608	\$64.45	\$1.64	2
	MO	Tlalnepantla, EM	\$6,592	\$728	\$74.79	\$1.90	6
	SD	Torreon, CU	\$6,522	\$670	\$73.48	\$1.86	5
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$711	\$84.72	\$2.30	10
	NE	Guadalajara, JA	\$8,134	\$814	\$91.42	\$2.49	5
	IA	El Castillo, JA <sup>5</sup>	\$8,555	\$795	\$95.53	\$2.60	10
	KS	Torreon, CU	\$6,651	\$505	\$73.11	\$1.99	6
Sorghum	OK	Cuautitlan, EM	\$5,730	\$607	\$64.75	\$1.64	2
	TX	Guadalajara, JA	\$6,653	\$520	\$73.29	\$1.86	1
	NE	Penjamo, GJ	\$7,426	\$726	\$83.29	\$2.11	2
	KS	Queretaro, QA	\$6,460	\$456	\$70.66	\$1.79	3
	NE	Salinas Victoria, NL	\$5,178	\$534	\$58.36	\$1.48	5
	NE	Torreon, CU	\$6,068	\$596	\$68.09	\$1.73	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

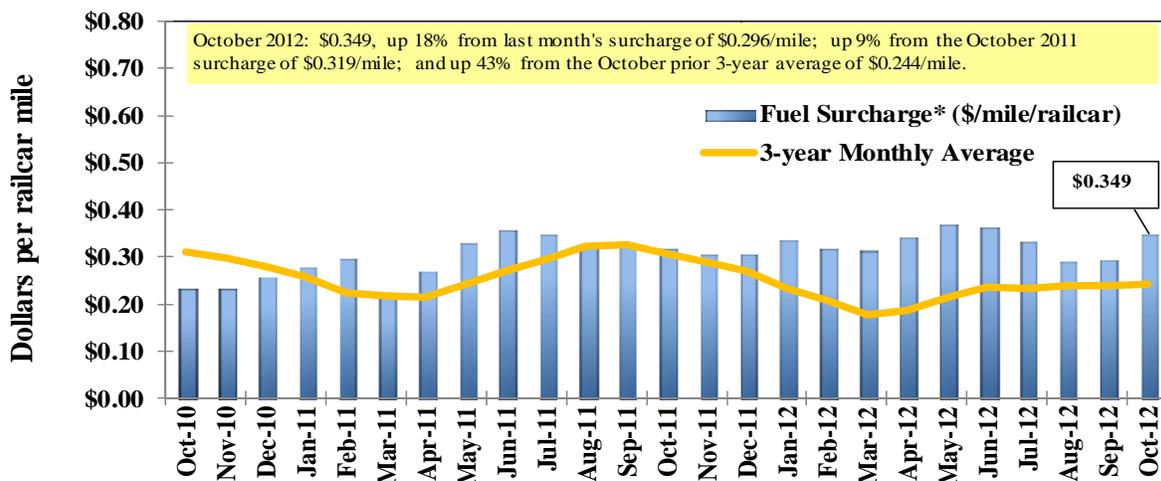
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

<sup>5</sup>Beginning 12/6/10, El Castillo, JA 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.

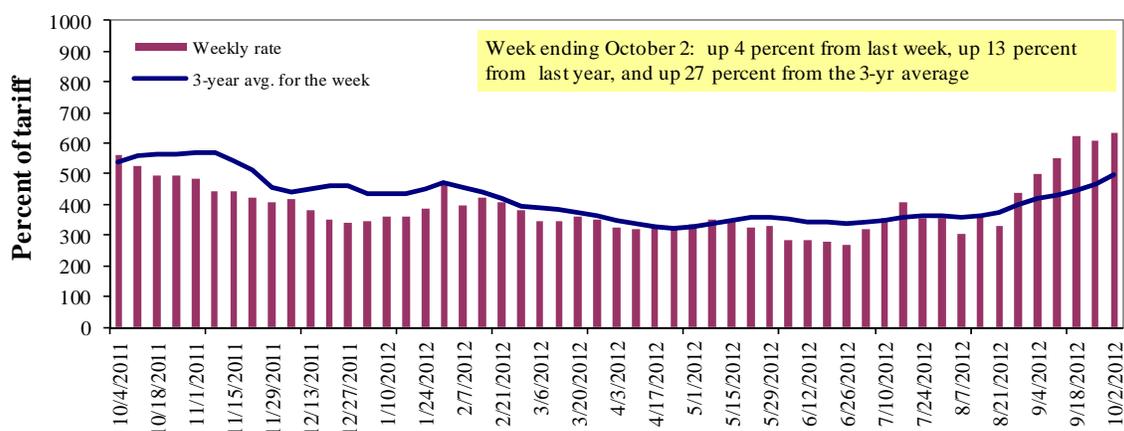
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

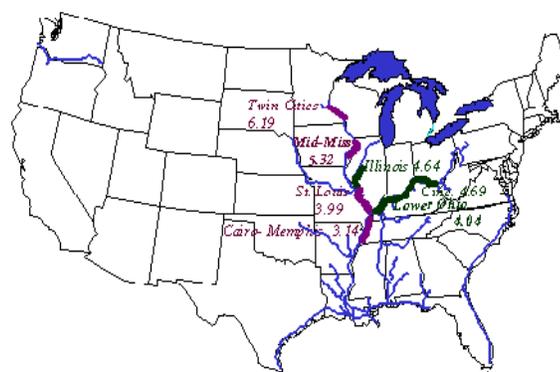
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	10/2/2012	697	690	633	600	623	623	562
	9/25/2012	617	605	608	600	625	625	565
<b>\$/ton</b>	10/2/2012	43.14	36.71	29.37	23.94	29.22	25.17	17.65
	9/25/2012	38.19	32.19	28.21	23.94	29.31	25.25	17.74
<b>Current week % change from the same week:</b>								
	Last year	23	24	13	26	10	10	19
	3-year avg. <sup>2</sup>	37	38	27	37	22	22	35
<b>Rate<sup>1</sup></b>	November	593	513	498	417	508	508	392
	January	-	-	400	342	382	382	303

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds; - closed for winter

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9  
Benchmark tariff rates



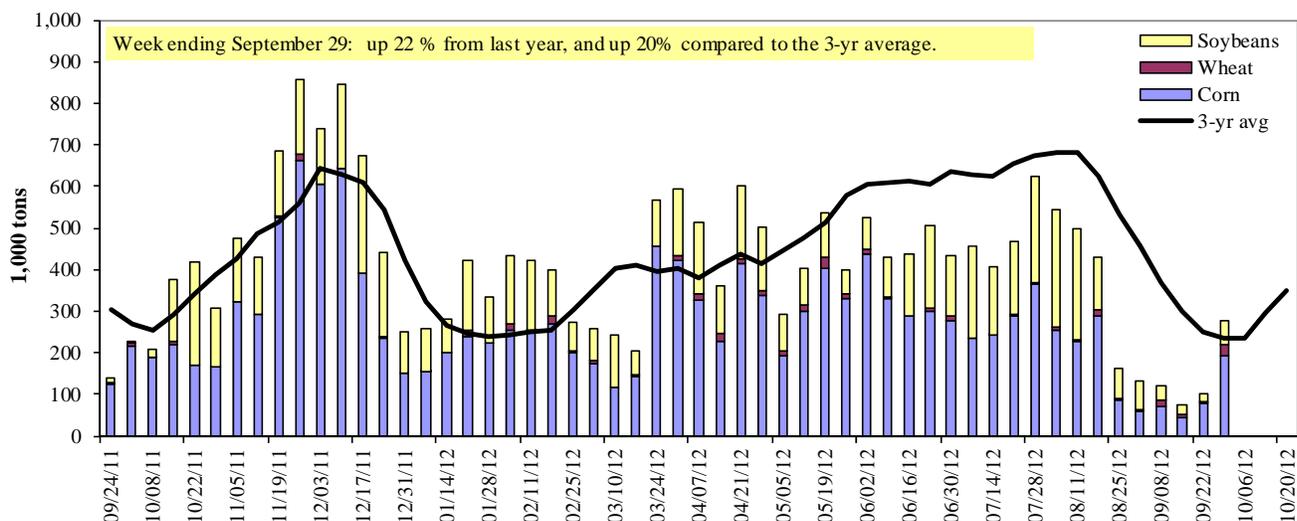
### Calculating barge rate per ton:

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

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 9/29/2012	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	13	13	17	0	42
Winfield, MO (L25)	64	19	36	0	119
Alton, IL (L26)	180	27	44	0	251
Granite City, IL (L27)	194	27	58	0	278
<b>Illinois River (L8)</b>	74	0	0	0	74
<b>Ohio River (L52)</b>	48	15	40	0	104
<b>Arkansas River (L1)</b>	0	24	55	0	78
Weekly total - 2012	242	66	152	0	460
Weekly total - 2011	290	17	21	4	333
2012 YTD <sup>1</sup>	12,283	1,550	7,525	195	21,553
2011 YTD	14,202	1,211	4,945	294	20,653
2012 as % of 2011 YTD	86	128	152	66	104
Last 4 weeks as % of 2011 <sup>2</sup>	42	34	154	10	65
Total 2011	19,921	1,460	8,553	422	30,356

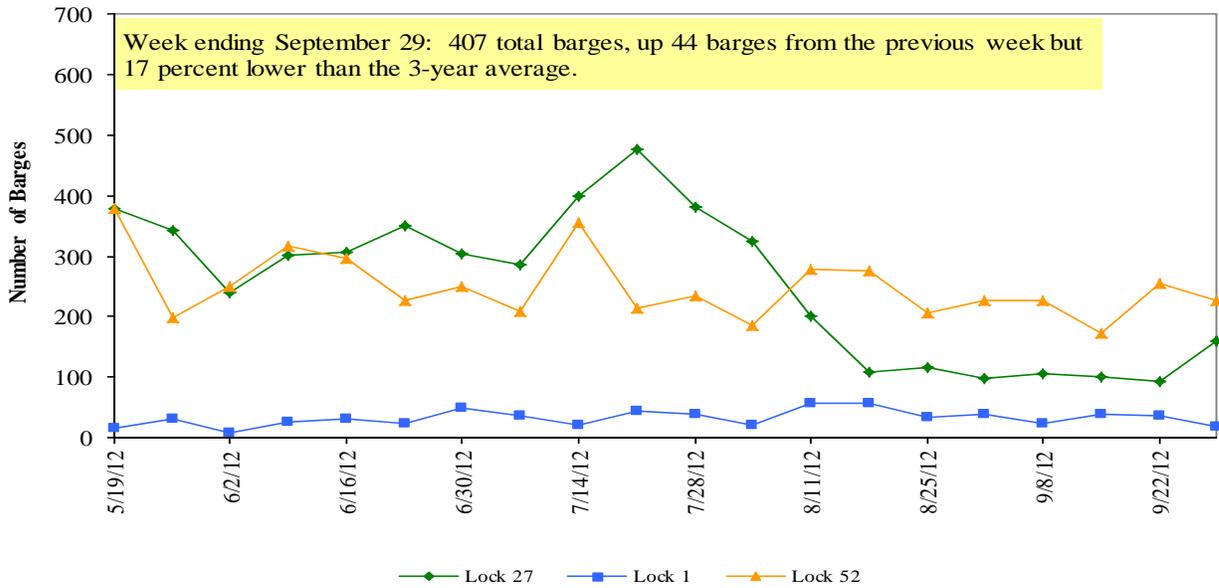
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

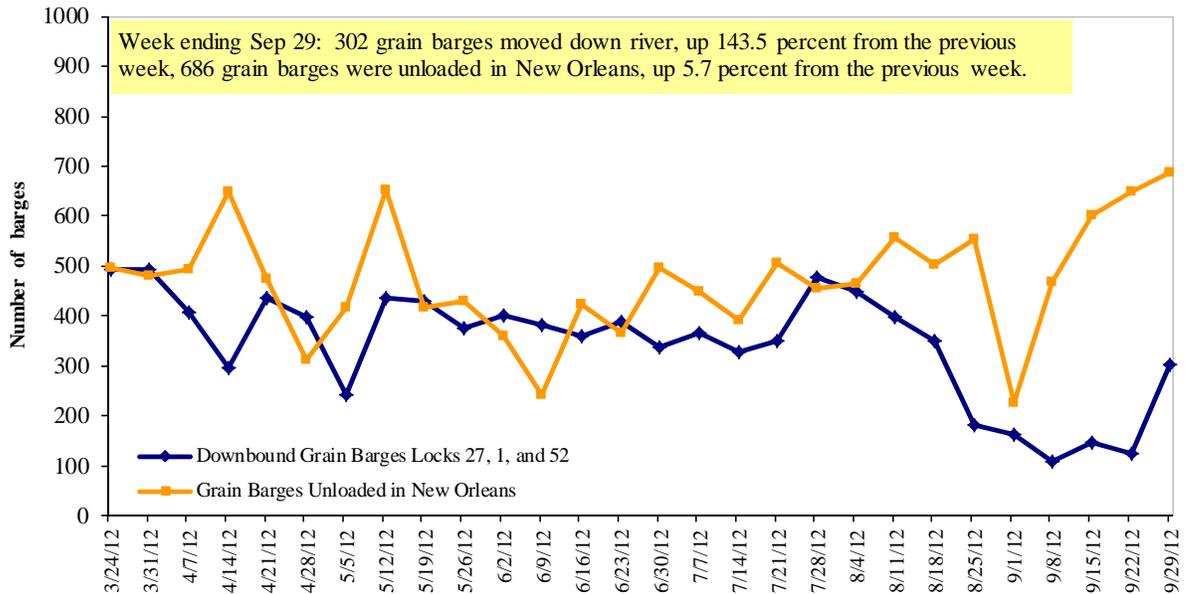
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrimi/omni/webprts/default.asp](http://www.mvr.usace.army.mil/mvrimi/omni/webprts/default.asp))

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



Source: U.S. Army Corps of Engineers

**Figure 12**  
**Grain Barges for Export in New Orleans Region**



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

# Truck Transportation

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

Table 11

**Retail on-Highway Diesel Prices<sup>1</sup>, Week Ending 10/01/2012 (US \$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.081	-0.011	0.316
	New England	4.195	0.004	0.254
	Central Atlantic	4.168	-0.002	0.287
	Lower Atlantic	3.995	-0.020	0.296
II	Midwest <sup>2</sup>	4.013	-0.004	0.314
III	Gulf Coast <sup>3</sup>	3.999	0.004	0.306
IV	Rocky Mountain	4.205	-0.023	0.359
V	West Coast	4.301	-0.022	0.374
	West Coast less California	4.212	-0.037	-
	California	4.376	-0.010	0.369
Total	U.S.	4.079	-0.007	0.330

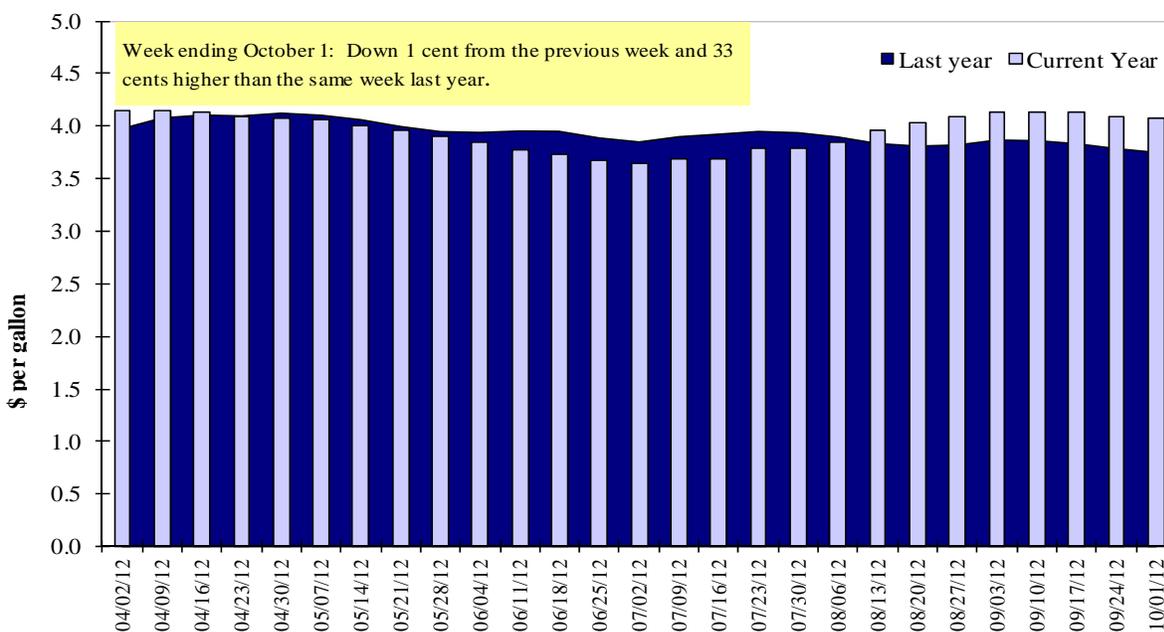
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
9/20/2012	1,359	712	1,182	783	108	4,143	8,434	21,296	33,873
This week year ago	1,503	674	1,367	988	84	4,615	13,748	15,213	33,576
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2012/13 YTD	3,503	1,174	2,162	1,597	196	8,631	1,669	941	11,241
2011/12 YTD	4,088	1,326	2,392	1,595	221	9,622	2,071	903	12,596
YTD 2012/13 as % of 2011/12	86	89	90	100	89	90	81	104	89
Last 4 wks as % of same period 2011/12	97	105	96	82	125	95	53	106	83
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

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

<sup>2</sup> Shipped export sales to date; new marketing year begins for corn and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA ([www.fas.usda.gov](http://www.fas.usda.gov))

Table 13

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

Week ending 09/20/12	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,467	3,257	(24)	12,367
Mexico	2,488	2,797	(11)	9,617
China	1,053	846	25	5,414
Korea	349	988	(65)	3,639
Venezuela	117	72	64	1,332
<b>Top 5 importers</b>	<b>6,474</b>	<b>7,959</b>	<b>(19)</b>	<b>32,369</b>
<b>Total US corn export sales</b>	<b>10,102</b>	<b>15,820</b>	<b>(36)</b>	<b>39,120</b>
% of Projected	32%	40%		
Change from prior week	<b>0.10</b>	<b>788</b>		
<b>Top 5 importers' share of U.S. corn export sales</b>	64%	50%		83%
<b>USDA forecast, September 2012</b>	<b>31,750</b>	<b>39,120</b>	<b>(19)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol September 2012</b>	<b>114,300</b>	<b>127,000</b>	<b>(10)</b>	

(n) indicates negative number.

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

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

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

Table 14

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

Week Ending 09/20/2012	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2012/13 Next MY Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	13,546	11,414	19	24,602
Mexico	699	819	(15)	3,180
Japan	520	603	(14)	1,891
Indonesia	225	425	(47)	1,741
Egypt	213	175	22	1,292
<b>Top 5 importers</b>	<b>15,202</b>	<b>13,436</b>	<b>13</b>	<b>32,706</b>
<b>Total US soybean export sales</b>	<b>22,237</b>	<b>16,116</b>	<b>38</b>	<b>37,010</b>
% of Projected	77%	44%		
Change from prior week	800	1,027		
<b>Top 5 importers' share of U.S. soybean export sales</b>	68%	83%		
<b>USDA forecast, September 2012</b>	<b>28,710</b>	<b>37,010</b>	<b>(22)</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 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 09/20/2012	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,665	1,878	(11)	3,512
Mexico	1,819	1,749	4	3,496
Nigeria	1,523	1,702	(11)	3,248
Philippines	1,121	1,225	(8)	2,039
Korea	840	581	45	1,983
Egypt	131	247	(47)	950
Taiwan	496	355	40	888
Indonesia	346	433	(20)	830
Venezuela	402	292	38	594
Iraq	209	572	(63)	572
<b>Top 10 importers</b>	<b>8,551</b>	<b>9,032</b>	<b>(5)</b>	<b>18,111</b>
<b>Total US wheat export sales</b>	<b>12,774</b>	<b>14,237</b>	<b>(10)</b>	<b>28,560</b>
% of Projected	39%	50%		
Change from prior week	426	429		
<b>Top 10 importers' share of U.S. wheat export sales</b>	67%	63%		63%
<b>USDA forecast, September 2012</b>	<b>32,660</b>	<b>28,560</b>	<b>14</b>	

(n) indicates negative number.

<sup>1</sup>Modified from the FAS 2011/12 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 09/27/12	Previous Week <sup>1</sup>	Current Week as % of Previous	2012 YTD <sup>1</sup>	2011 YTD <sup>1</sup>	2012 YTD as % of 2011 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2011
							2011	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	334	297	112	10,731	11,223	96	111	113	13,995
Corn	0	52	1	5,003	7,038	71	35	16	9,198
Soybeans	312	0	n/a	6,001	3,795	158	226	290	7,321
<b>Total</b>	<b>646</b>	<b>349</b>	<b>185</b>	<b>21,735</b>	<b>22,055</b>	<b>99</b>	<b>109</b>	<b>94</b>	<b>30,513</b>
<b>Mississippi Gulf</b>									
Wheat	53	125	42	4,481	4,205	107	75	74	5,031
Corn	405	508	80	14,928	19,767	76	89	73	26,267
Soybeans	669	299	224	13,537	11,335	119	190	156	19,262
<b>Total</b>	<b>1,126</b>	<b>932</b>	<b>121</b>	<b>32,945</b>	<b>35,307</b>	<b>93</b>	<b>113</b>	<b>95</b>	<b>50,560</b>
<b>Texas Gulf</b>									
Wheat	210	144	146	4,839	9,425	51	88	77	10,837
Corn	0	0	n/a	329	810	41	n/a	0	1,021
Soybeans	0	0	n/a	5	763	1	n/a	0	926
<b>Total</b>	<b>210</b>	<b>144</b>	<b>146</b>	<b>5,173</b>	<b>10,998</b>	<b>47</b>	<b>88</b>	<b>67</b>	<b>12,784</b>
<b>Interior</b>									
Wheat	49	14	338	928	868	107	372	188	1,110
Corn	102	49	206	5,337	5,420	98	103	62	7,509
Soybeans	152	21	714	3,080	2,859	108	78	141	4,273
<b>Total</b>	<b>302</b>	<b>85</b>	<b>355</b>	<b>9,346</b>	<b>9,147</b>	<b>102</b>	<b>132</b>	<b>94</b>	<b>12,892</b>
<b>Great Lakes</b>									
Wheat	0	30	0	296	829	36	122	42	1,038
Corn	0	0	n/a	56	149	37	0	0	178
Soybeans	0	0	0	149	22	669	n/a	0	382
<b>Total</b>	<b>0</b>	<b>31</b>	<b>0</b>	<b>501</b>	<b>1,001</b>	<b>50</b>	<b>94</b>	<b>38</b>	<b>1,598</b>
<b>Atlantic</b>									
Wheat	22	0	5,771	313	651	48	756	125	686
Corn	7	7	99	134	201	67	422	57	295
Soybeans	3	9	32	632	491	129	102	110	1,042
<b>Total</b>	<b>32</b>	<b>17</b>	<b>191</b>	<b>1,079</b>	<b>1,344</b>	<b>80</b>	<b>372</b>	<b>96</b>	<b>2,022</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	667	611	109	21,588	27,201	79	103	94	32,697
Corn	513	617	83	25,787	33,386	77	78	59	44,466
Soybeans	1,136	330	344	23,404	19,265	121	176	165	33,205
<b>Total</b>	<b>2,316</b>	<b>1,558</b>	<b>149</b>	<b>70,779</b>	<b>79,852</b>	<b>89</b>	<b>106</b>	<b>89</b>	<b>110,369</b>

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

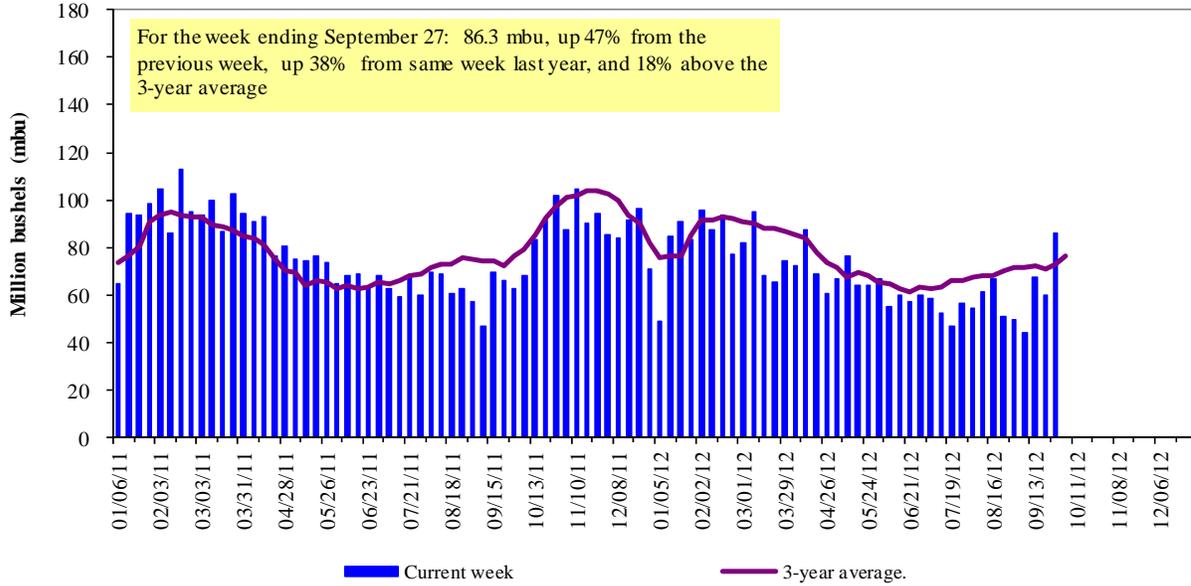
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2011.

Figure 14

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

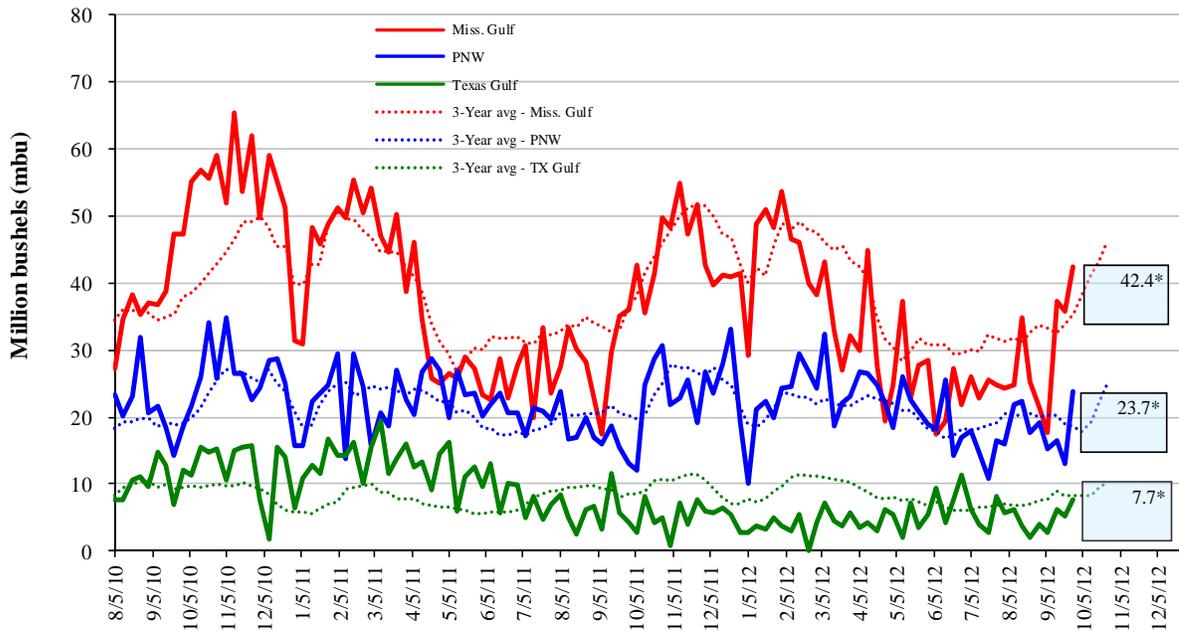


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

September 27 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 19	up 46	up 22	up 83
Last year (same week)	up 17	up 83	up 24	up 81
3-yr avg. (4-wk mov. avg.)	up 20	down 6	up 15	up 35

# Ocean Transportation

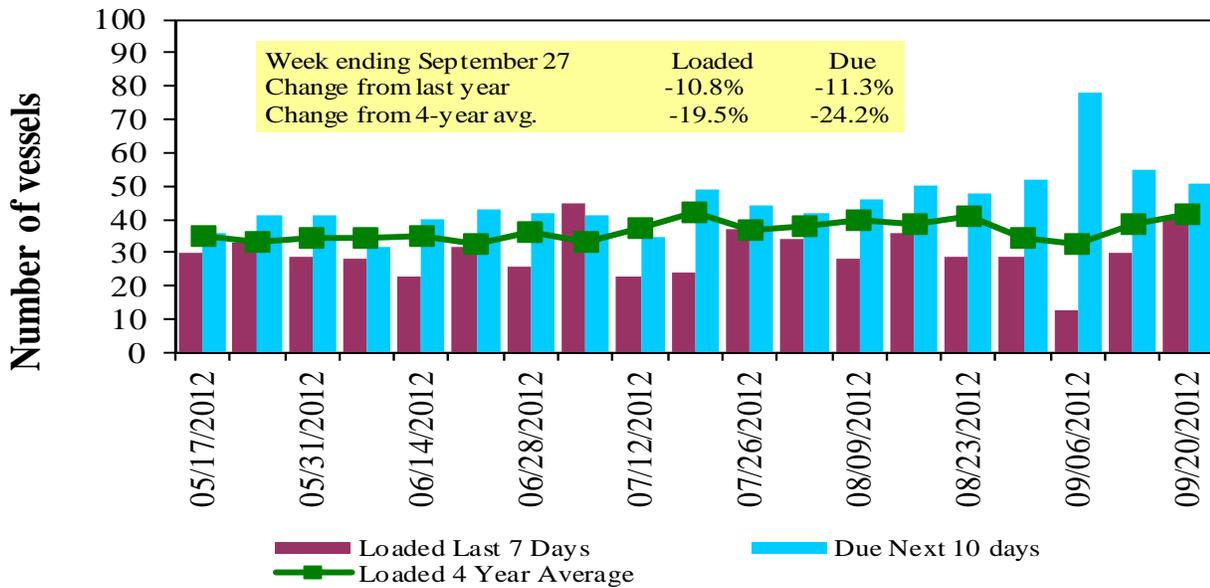
Table 17

**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
9/27/2012	45	33	47	7	n/a
9/20/2012	39	40	51	11	n/a
2011 range	(14..65)	(28..54)	(34..83)	(5..25)	(1..20)
2011 avg.	31	38	53	15	12

Source: Transportation & Marketing Programs/AMS/USDA

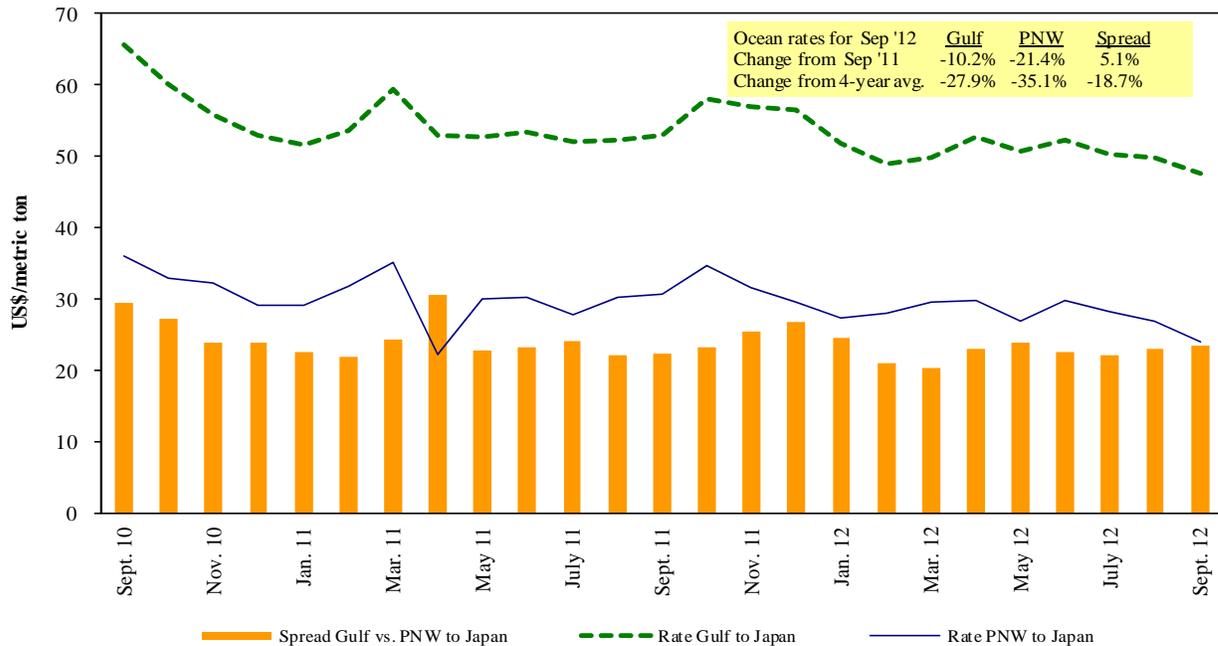
**Figure 16**  
**U.S. Gulf<sup>d</sup> Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

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



Source: O'Neil Commodity Consulting

Table 18

## Ocean Freight Rates For Selected Shipments, Week Ending 09/29/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Oct 20/30	55,000	43.75
U.S. Gulf	China	Heavy Grain	Oct 15/24	5,500	43.00
U.S. Gulf	China	Heavy Grain	Sep 20/30	55,000	48.00
U.S. Gulf	China	Heavy Grain	Sep 13/22	55,000	45.50
U.S. Gulf	China	Heavy Grain	Sep 10/20	55,000	46.00
U.S. Gulf	China	Heavy Grain	Sep 10/20	55,000	48.00
U.S. Gulf	China	Heavy Grain	Sep 1/10	55,000	47.00
U.S. Gulf	Mozambique <sup>1</sup>	Wheat	Sep 20/30	10,000	211.50
Brazil	Algeria	Corn	Aug 18/25	30,000	24.50
Brazil	China	Heavy Grain	Aug 10/20	60,000	48.50
Brazil	Egypt	Corn	Aug 18/20	45,000	28.50
Mexico	Turkey	Wheat	Sep 10/25	55,000	24.75
River Plate	Algeria	Corn	Aug 20/30	25,000	32.50
River Plate	Tunisia	Heavy Grain	Aug 17/20	30,000	28.50
River Plate	Tunisia	Soybean Meal	Sep 1/10	25,000	36.00
Russia	Egypt Med	Wheat	Aug 17/23	60,000	12.00

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

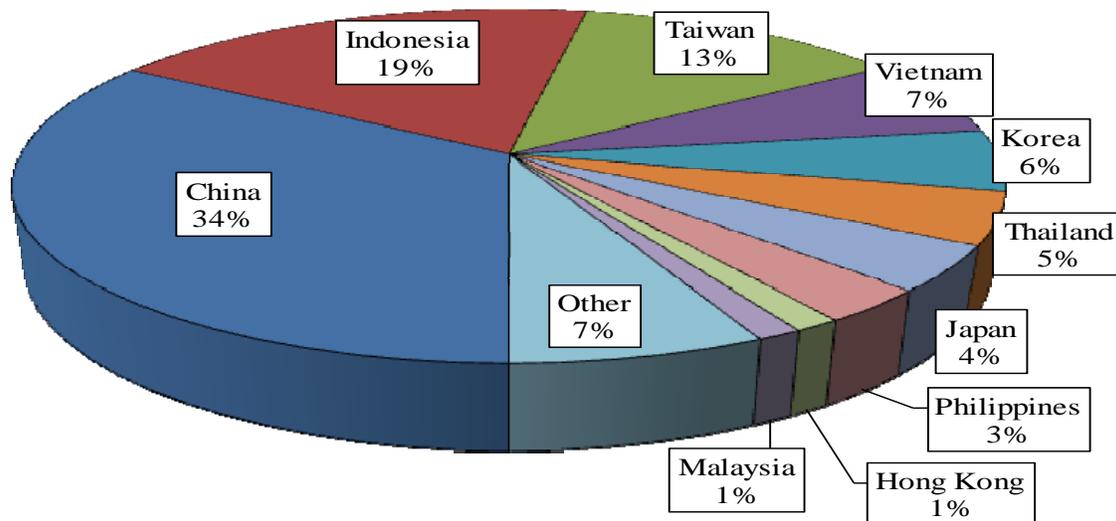
<sup>1</sup>75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2011, containers were used to transport 7 percent of total U.S. waterborne grain exports, up 2 percentage points from 2010. Approximately 11 percent of U.S. waterborne grain exports in 2011 went to Asia, up 4 percentage points from 2010. Asia is the top destination for U.S. containerized grain exports—96 percent in 2011.

Figure 18

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

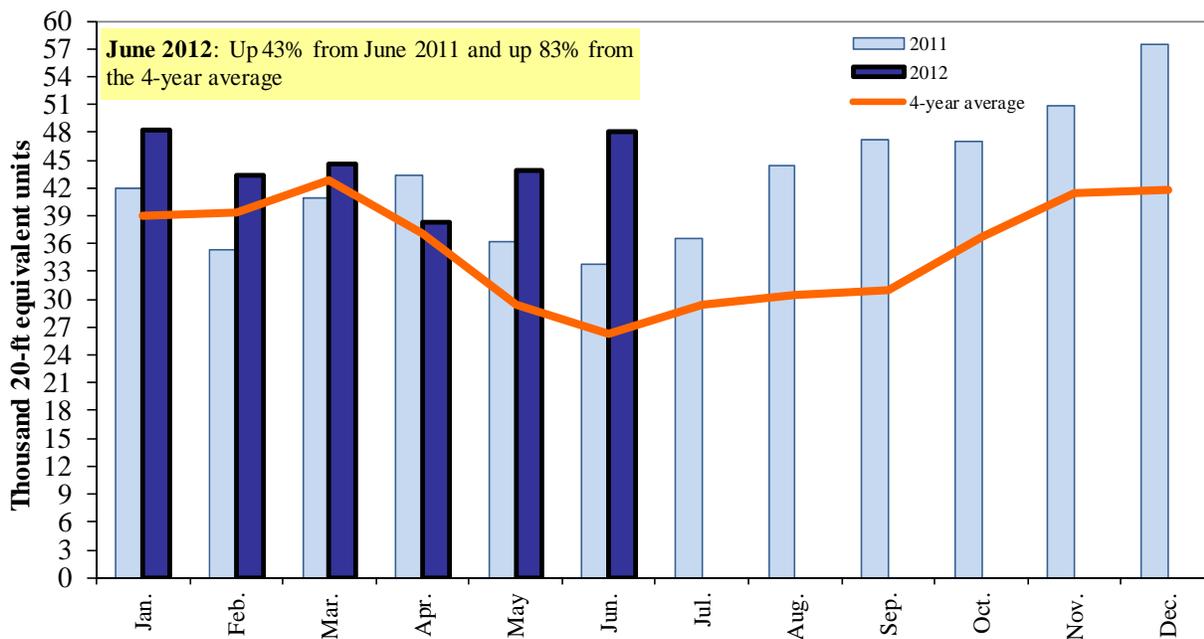


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19

**Monthly Shipments of Containerized Grain to Asia**



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

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

# Contacts and Links

## Coordinators

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