



# Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division  
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Nov. 7, 2013

## WEEKLY HIGHLIGHTS

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#### Gulf Grain Vessel Loading Activity Has Been Strong

Grain loading activity in the U.S. Gulf has been strong during the past few weeks. During the week ending October 31, 44 **ocean-going grain vessels** were loaded in the Gulf, 7 percent more than the same period last year and 5 percent more than the 4-year average. Seventy-nine vessels are expected to be loaded within the next 10 days, 36 percent more than the same period last year and 23 percent above the 4-year average. In the past 4 weeks, an average of 46 ocean-going grain vessels were loaded per week, and an average of 74 vessels were expected to be loaded within the next 10 days.

#### Grain Inspections Continue Above 3-Year Average

For the week ending October 31, **total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 3.19 million metric tons (mmt), down 6 percent from the previous week but 35 percent above this time last year. Despite the decrease, grain inspections during the past four weeks were 21 percent above the 3-year average and up 22 percent from last year. Total corn inspections (.797 mmt) increased 20 percent from the previous week, as shipments to Asia and Mexico rebounded. Total inspections of soybeans decreased 3 percent from the past week, and wheat inspections dropped 57 percent. During the last four weeks, Pacific Northwest and Mississippi Gulf grain inspections were 9 and 25 percent above this time last year.

#### Secondary Railcar Market Reaches Historic High

During the week ending October 31, average November non-shuttle **secondary railcar bids/offers per car** were \$908.50 above tariff, up \$492 from last week and \$908.50 higher than last year. Average shuttle bids/offers were \$1,696 above tariff, up \$596 from last week and \$1,937.50 higher than last year. These averages reflect the highest bids on record—\$1,617 for non-shuttle service and \$2,517 for shuttle service—even when adjusted for inflation. Both of these bids are for delivery of railcars on the BNSF Railway, whose train velocity has been reduced by the record harvest and maintenance of way improvements to increase future capacity. BNSF states that it is currently finishing most of the track work and bringing additional locomotives, railcars, and crews on-line to address service issues. BNSF has indicated service should improve each week throughout November. Across the border, the record harvest in Canada has similarly strained its rail transportation system. Despite record car deliveries, railcar demand is still twice the available supply, leading to a shortage of railcars on both the Canadian Pacific and Canadian National lines, as ships idle in Pacific ports waiting for graincars to arrive.

#### Soybeans Dominate Barge Traffic As Most of New Corn and Soybean Crop Has Been Harvested

As of November 3, 86 percent of the nation's soybean crop has been harvested, slightly ahead of the 5-year average pace of 85 percent. For the week ending November 2, soybean movements represented 71 percent of downbound barge grain movements originating on the locking portions of the river system. The corn harvest is 73 percent complete, slightly ahead of the 5-year average pace of 71 percent. Corn movements were 25 percent of downbound grain barge movements. According to barge operators and shippers, if the corn crop is estimated to be near or above record levels, corn barge movements should reach significant volumes in the near future. In addition, fertilizer upbound movements at Mississippi River Locks 27 was 213,000 tons for the week ending November 2. Last October, upbound fertilizers averaged 167,000 tons per week.

#### The Federal Maritime Commission Calls for Global Regulatory Summit on P3 Alliance

The U.S. Federal Maritime Commission Chairman, Mario Cordero, issued a call to fellow regulators in the European Union and the People's Republic of China, to join with him in a Global Regulatory Summit on the proposed P3 Global Alliance of the world's three largest container carriers: Maersk Line, CMA-CGM, and Mediterranean Shipping. The Summit would take place in Washington, DC, with regulators discussing their respective regulatory roles in considering the impact of the announced Alliance. The three carriers announced they would begin cooperating in 2014 on routes covering Asia to Europe as well as transpacific and transatlantic routes to the United States. Early estimates by Maersk Line's chief trading and marketing officer put market control of such an alliance at about 42 percent on the Asia-to-Europe route, 24 percent on the transpacific routes, and 40–42 percent on the transatlantic route. Many agricultural exporters that use containers are concerned this alliance will reduce the number of available vessels and increase rates for the impacted trade lanes.

#### Snapshots by Sector

##### **Rail**

U.S. railroads originated 25,099 **carloads of grain** during the week ending October 26, up 12 percent from last week, 30 percent from last year, and up 12 percent from the 3-year average.

##### **Barge**

During the week ending November 2, **barge grain movements** totaled 856,626 tons, 1.4 percent higher than the previous week and 9 percent higher than the same period last year.

During the week ending November 2, 549 grain barges **moved down river**, up 3 percent from last week; 921 grain barges were **unloaded in New Orleans**, up 13.3 percent from the previous week.

##### **Ocean**

During the week ending November 1, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$54.50 per mt, down 1 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$30.50 per mt, down 2 percent from the previous week.

##### **Fuel**

During the week ending November 4, U.S. average **diesel fuel prices** decreased 1 cent from the previous week to \$3.86 per gallon—15 cents lower than the same week last year.

# Feature Article/Calendar

## Increased Iron Ore and Grain Shipments Drive Up Ocean Freight Rates

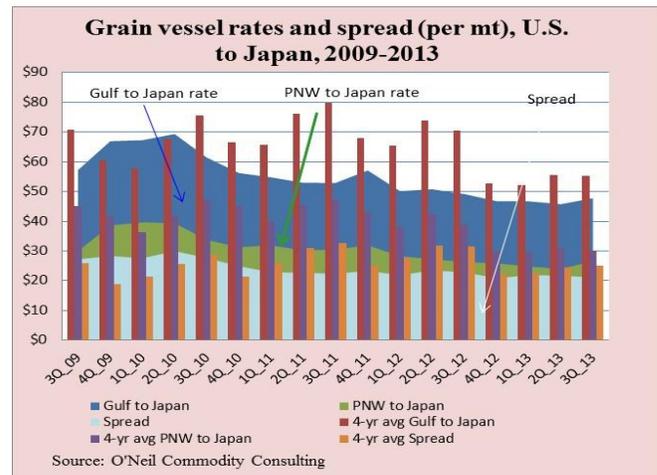
Increased iron ore imports by China and a surge in U.S. grain exports drove bulk ocean freight rates higher during the 3<sup>rd</sup> quarter. Ocean freight rates for shipping bulk grain through the U.S. Gulf to Japan during the 3<sup>rd</sup> quarter averaged \$48 per metric ton (mt)—4 percent more than the previous quarter, but 3 and 13 percent below last year and the 4-year average, respectively (table and figure). The cost of shipping a metric ton of grain from the Pacific Northwest (PNW) to Japan averaged about \$27—11 and 1 percent more than the previous quarter and last year, and 12 percent less than the 4-year average. Ocean freight rates from the Gulf to Rotterdam, Europe, averaged approximately \$25 per mt during the quarter—19 and 14 percent above the previous quarter and last year, and 6 percent more than the 4-year average. The spread between the Gulf and PNW rates declined during the quarter to \$21 per mt, lower than last year and the 4-year average.

Ocean freight rates for grain routes during third quarter 2013							
Route	July	Aug.	Sept.	3 <sup>rd</sup> quarter 2013	Change from		
					2 <sup>nd</sup> qtr '13	3 <sup>rd</sup> qtr '12	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	45.88	45.50	52.00	47.79	4.4	-3	-13
PNW to Japan	24.19	24.45	31.25	26.63	11.0	1	-12
Spread	21.69	21.05	20.75	21.16	-3	-8	-15
U.S. Gulf to Europe	23.13	23.30	28.13	24.85	19	14	6

Source: O'Neil Commodity Consulting

In July, higher rates in the Pacific region were driven by iron shipments to China. In the Atlantic region, grain exports from the U.S. Gulf and Argentina both increased, as did coal shipments. Although the freight market was mixed during August, Chinese steel demand increased because of better economic conditions in China. The resulting higher iron ore imports to China increased the demand for larger Capesize vessels from West Australia to China. The rates continued to climb during September as robust grain, thermal coal and mineral shipments continued along with Chinese restocking of raw materials. Iron ore shipments from Australia and Brazil also increased. Transatlantic rates surged as demand for Panamax vessels increased in the U.S. Gulf because of an increase in grain cargoes.

**Market outlook:** Ocean freight rates for shipping bulk commodities appear to be surging, but the market is still uncertain. Although the gap between vessel supply and demand is narrowing, excess tonnage is still available in the market. According to a report by O'Neil Consulting on September 20, 539 new dry bulk vessels have been delivered so far this year, representing 44.5 million new deadweight tons (mdwt). The deliveries included 77 Capesize (16.9 mdwt), 177 Panamax (14.4 mdwt), 152 Supramaxes (98.7 mdwt) and 133 Handysizes (4.4 mdwt). In addition to congestion in India and Australia during the monsoon season, Panamax vessels waiting to load grain at Brazilian ports were backed up during September. India's Supreme Court has imposed mining restrictions on major iron-producing States, significantly limiting iron trade from India to China. On the other hand, the Chinese economic stimulus began to have an effect in September. Chinese iron ore imports are likely to continue to grow as infrastructure development, such as railway expansion, accelerates. [Surajudeen.olowolayemo@ams.usda.gov](mailto:Surajudeen.olowolayemo@ams.usda.gov)





# Rail Transportation

Table 3

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

Week ending	Mississippi		Pacific		Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf				
10/30/2013 <sup>p</sup>	1,786	414	6,413	1,328		9,941	10/26/13	2,226
10/23/2013 <sup>r</sup>	1,880	1,101	5,978	1,365		10,324	10/19/13	1,799
2013 YTD <sup>r</sup>	17,488	61,994	121,132	15,726		216,340	2013 YTD	56,300
2012 YTD <sup>r</sup>	13,589	35,101	169,242	16,833		234,765	2012 YTD	81,689
2013 YTD as % of 2012 YTD	129	177	72	93		92	% change YTD	69
Last 4 weeks as % of 2012 <sup>2</sup>	159	144	150	157		147	Last 4wks % 2012	112
Last 4 weeks as % of 4-year avg. <sup>2</sup>	145	84	136	153		131	Last 4wks % 4 yr	113
Total 2012	22,604	40,780	199,419	40,385		287,462	Total 2012	92,008
Total 2011	27,358	77,515	191,187	24,088		320,148	Total 2011	97,118

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

<sup>2</sup> Compared with same 4-weeks in 2012 and prior 4-year average.

<sup>3</sup> Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

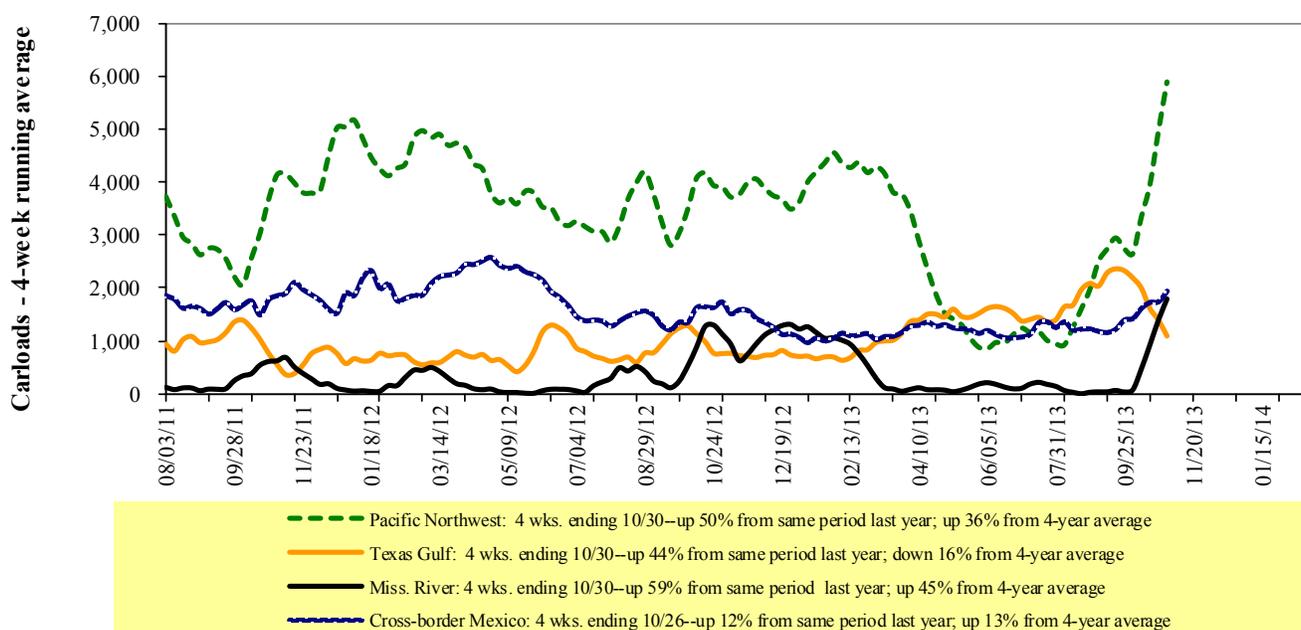
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

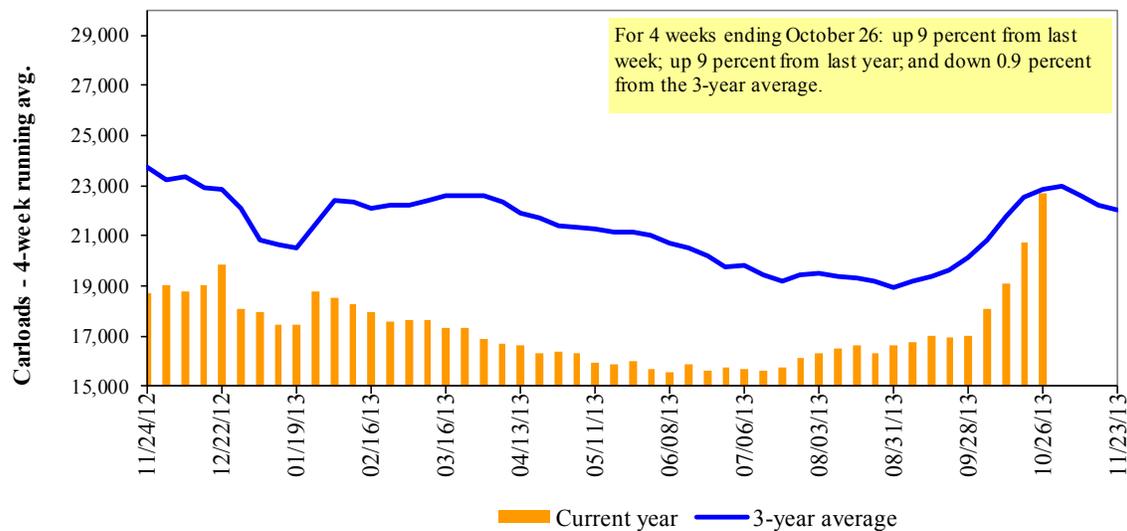
Table 4

**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
10/26/13	3,263	4,437	10,205	1,357	5,837	25,099	4,364	4,949
This week last year	1,664	3,587	10,169	496	3,465	19,381	4,728	6,622
2013 YTD	64,189	105,798	374,954	26,513	171,602	743,056	147,225	222,649
2012 YTD	70,599	119,621	426,821	22,120	210,666	849,827	167,086	211,840
2013 YTD as % of 2012 YTD	91	88	88	120	81	87	88	105
Last 4 weeks as % of 2012	139	126	89	227	127	109	117	101
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	110	114	90	165	92	98	117	110
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

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

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

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

Source: Association of American Railroads

Table 5

**Railcar Auction Offerings<sup>1</sup> (\$/car)<sup>2</sup>**

Week ending	Delivery period							
	Nov-13	Nov-12	Dec-13	Dec-12	Jan-14	Jan-13	Feb-14	Feb-13
<b>10/31/2013</b>								
BNSF <sup>3</sup>								
COT grain units	no offer	no bids	no offer	no bids	219	0	163	no offer
COT grain single-car <sup>5</sup>	no offer	0 . . 6	no offer	0 . . 5	25 . . 133	0	2 . . 83	no offer
UP <sup>4</sup>								
GCAS/Region 1	26	no bids	1	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	201	no bids	1	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.

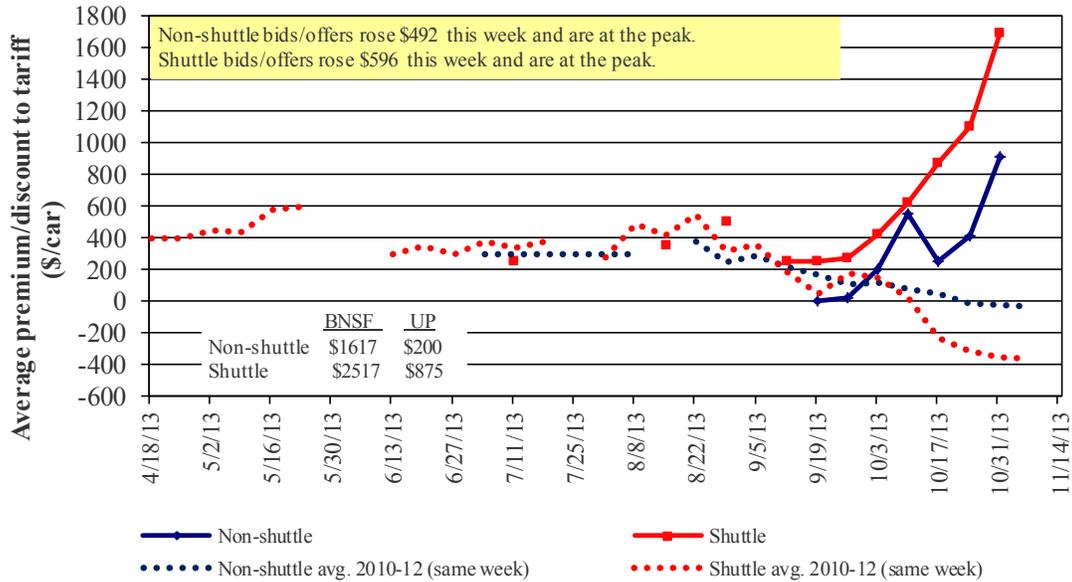
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 November 2013, Secondary Market**

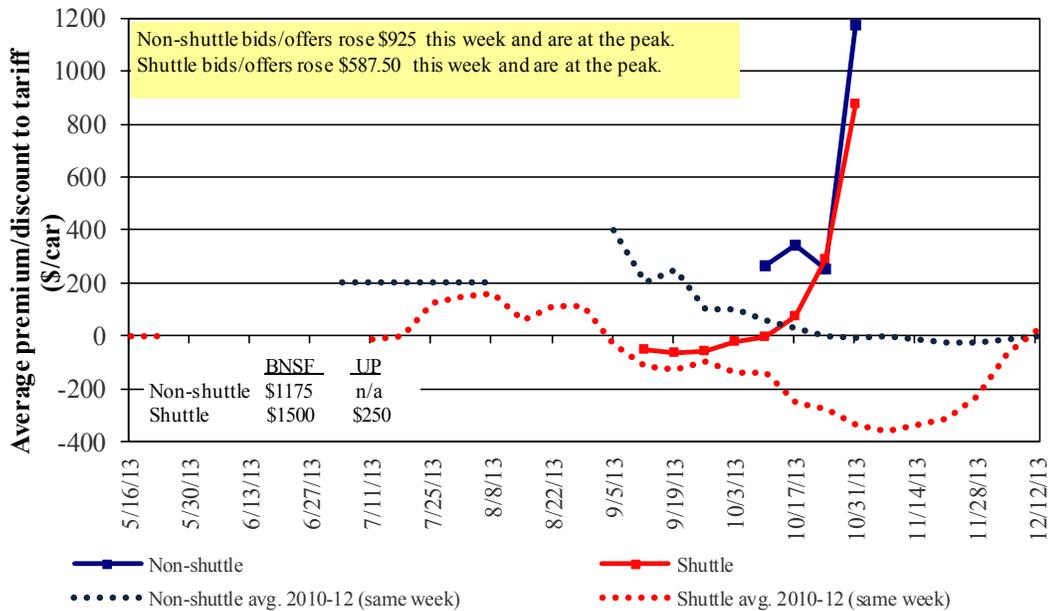


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

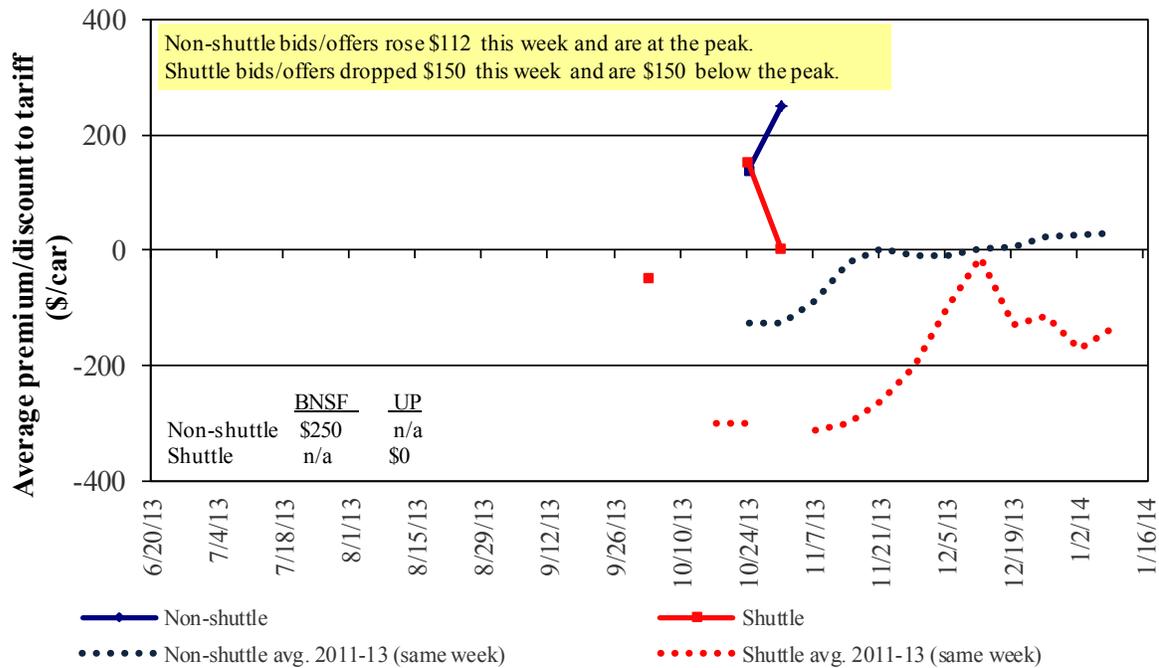


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in January 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					
	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
<b>Non-shuttle</b>						
BNSF-GF	1,617	1,175	250	n/a	n/a	n/a
Change from last week	884	925	112	n/a	n/a	n/a
Change from same week 2012	1,617	1,175	n/a	n/a	n/a	n/a
UP-Pool	200	n/a	n/a	n/a	n/a	n/a
Change from last week	100	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	200	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	2,517	1,500	n/a	n/a	n/a	n/a
Change from last week	842	1,125	n/a	n/a	n/a	n/a
Change from same week 2012	2,675	1,775	n/a	n/a	n/a	n/a
UP-Pool	875	250	-	n/a	n/a	n/a
Change from last week	350	50	(100)	n/a	n/a	n/a
Change from same week 2012	1,200	550	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:				Fuel	Tariff plus surcharge per:		Percent
11/1/2013	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$192	\$33.60	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$110	\$36.80	\$1.00	4
	Wichita, KS	Los Angeles, CA	\$6,244	\$566	\$67.63	\$1.84	2
	Wichita, KS	New Orleans, LA	\$3,808	\$338	\$41.17	\$1.12	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$465	\$62.45	\$1.70	3
	Northwest KS	Galveston-Houston, TX	\$4,076	\$371	\$44.16	\$1.20	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$516	\$47.57	\$1.29	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$382	\$35.49	\$0.90	1
	Toledo, OH	Raleigh, NC	\$4,686	\$433	\$50.83	\$1.29	3
	Des Moines, IA	Davenport, IA	\$2,078	\$81	\$21.44	\$0.54	3
	Indianapolis, IN	Atlanta, GA	\$4,061	\$325	\$43.56	\$1.11	3
	Indianapolis, IN	Knoxville, TN	\$3,469	\$209	\$36.52	\$0.93	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$238	\$34.32	\$0.87	1
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,215	\$693	\$58.67	\$1.49	2
	Minneapolis, MN	New Orleans, LA	\$3,459	\$417	\$38.49	\$1.05	1
	Toledo, OH	Huntsville, AL	\$3,687	\$308	\$39.67	\$1.08	2
	Indianapolis, IN	Raleigh, NC	\$4,756	\$436	\$51.56	\$1.40	3
	Indianapolis, IN	Huntsville, AL	\$3,379	\$209	\$35.63	\$0.97	3
Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$382	\$41.02	\$1.12	3	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$326	\$39.76	\$1.08	4
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$253	\$40.23	\$1.09	3
	Chicago, IL	Albany, NY	\$3,950	\$406	\$43.26	\$1.18	3
	Grand Forks, ND	Portland, OR	\$5,159	\$562	\$56.82	\$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$586	\$66.23	\$1.80	1
	Northwest KS	Portland, OR	\$5,043	\$608	\$56.11	\$1.53	4
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$685	\$56.45	\$1.43	2
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$627	\$55.48	\$1.41	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$382	\$33.70	\$0.86	4
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$366	\$38.49	\$0.98	4
	Des Moines, IA	Amarillo, TX	\$3,590	\$299	\$38.62	\$0.98	4
	Minneapolis, MN	Tacoma, WA	\$5,000	\$679	\$56.40	\$1.43	2
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,400	\$703	\$50.67	\$1.29	2
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$627	\$61.04	\$1.66	2
	Minneapolis, MN	Portland, OR	\$5,530	\$685	\$61.72	\$1.68	2
	Fargo, ND	Tacoma, WA	\$5,430	\$558	\$59.46	\$1.62	2
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$441	\$45.84	\$1.25	6
	Toledo, OH	Huntsville, AL	\$2,862	\$308	\$31.47	\$0.86	3
Grand Island, NE	Portland, OR	\$5,110	\$622	\$56.92	\$1.55	2	

<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: 11/1/2013

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change Y/Y <sup>4</sup>	
				surcharge per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup> bushel <sup>3</sup>		
Wheat	MT	Chihuahua, CI	\$6,360	\$595	\$71.06	\$1.93	-17
	OK	Cuautitlan, EM	\$6,357	\$723	\$72.33	\$1.97	-7
	KS	Guadalajara, JA	\$8,293	\$698	\$91.87	\$2.50	9
	TX	Salinas Victoria, NL	\$2,898	\$272	\$32.39	\$0.88	-22
Corn	IA	Guadalajara, JA	\$7,974	\$821	\$89.86	\$2.28	2
	SD	Celaya, GJ	\$7,656	\$778	\$86.18	\$2.19	3
	NE	Queretaro, QA	\$7,317	\$729	\$82.21	\$2.09	1
	SD	Salinas Victoria, NL	\$5,880	\$592	\$66.12	\$1.68	2
	MO	Tlalnepantla, EM	\$6,755	\$709	\$76.26	\$1.94	1
	SD	Torreón, CU	\$6,722	\$652	\$75.34	\$1.91	2
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$693	\$87.46	\$2.38	3
	NE	Guadalajara, JA	\$8,447	\$792	\$94.40	\$2.57	3
	IA	El Castillo, JA	\$8,855	\$774	\$98.38	\$2.67	2
	KS	Torreón, CU	\$6,864	\$491	\$75.15	\$2.04	2
Sorghum	TX	Guadalajara, JA	\$6,764	\$507	\$74.29	\$1.89	1
	NE	Celaya, GJ	\$7,272	\$707	\$81.52	\$2.07	3
	KS	Queretaro, QA	\$7,005	\$444	\$76.11	\$1.93	7
	NE	Salinas Victoria, NL	\$5,628	\$520	\$62.81	\$1.59	7
	NE	Torreón, CU	\$6,328	\$580	\$70.59	\$1.79	3

<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.

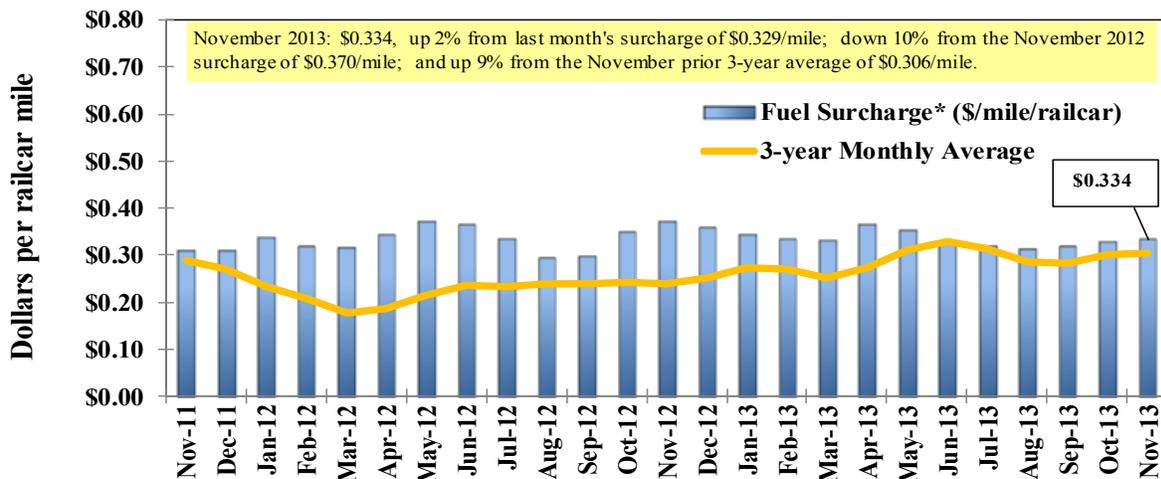
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

<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.

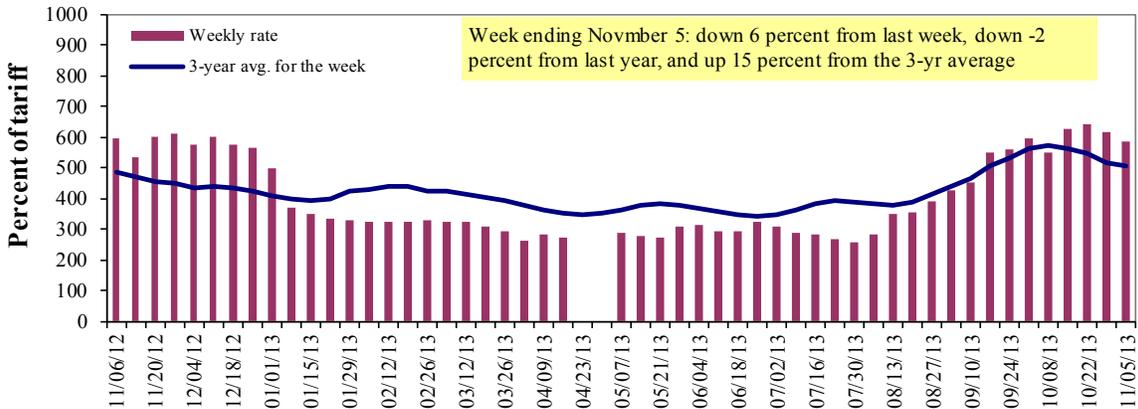
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	11/5/2013	503	547	583	540	575	575	457
	10/29/2013	563	592	618	560	725	725	600
<b>\$/ton</b>	11/5/2013	31.14	29.10	27.05	21.55	26.97	23.23	14.35
	10/29/2013	34.85	31.49	28.68	22.34	34.00	29.29	18.84
<b>Current week % change from the same week:</b>								
	Last year	-14	-13	-2	-14	15	15	7
	3-year avg. <sup>2</sup>	-14	3	15	13	16	16	8
<b>Rate<sup>1</sup></b>	December	--	--	463	358	432	432	315
	February	--	--	412	347	383	383	297

<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

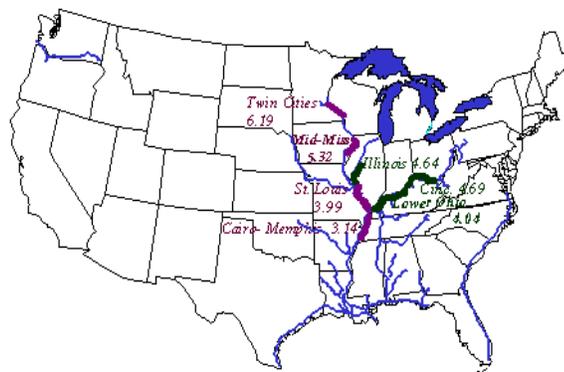
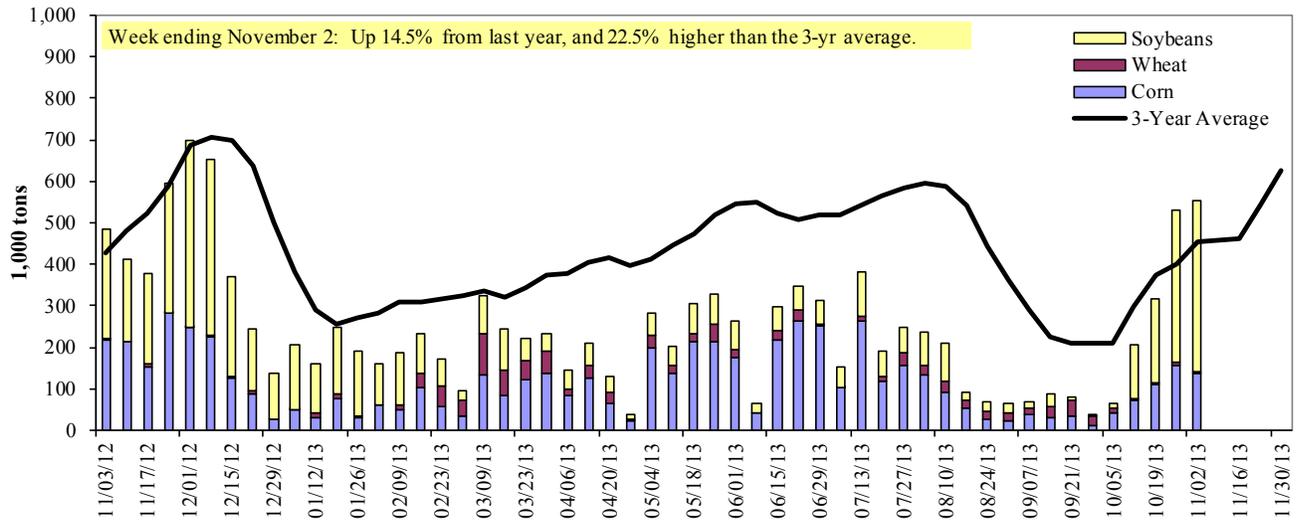


Figure 10

**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 11/2/2013	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	11	0	61	0	73
Winfield, MO (L25)	79	3	226	0	308
Alton, IL (L26)	121	6	337	0	464
Granite City, IL (L27)	136	6	412	0	555
<b>Illinois River (L8)</b>	61	3	66	0	130
<b>Ohio River (L52)</b>	81	0	133	2	216
<b>Arkansas River (L1)</b>	0	17	66	3	85
Weekly total - 2013	218	23	611	5	857
Weekly total - 2012	250	10	524	2	786
2013 YTD <sup>1</sup>	6,942	3,948	6,550	187	17,628
2012 YTD	13,118	1,660	9,457	216	24,451
2013 as % of 2012 YTD	53	238	69	87	72
Last 4 weeks as % of 2012 <sup>2</sup>	136	105	100	227	111
Total 2012	14,837	1,794	12,663	229	29,523

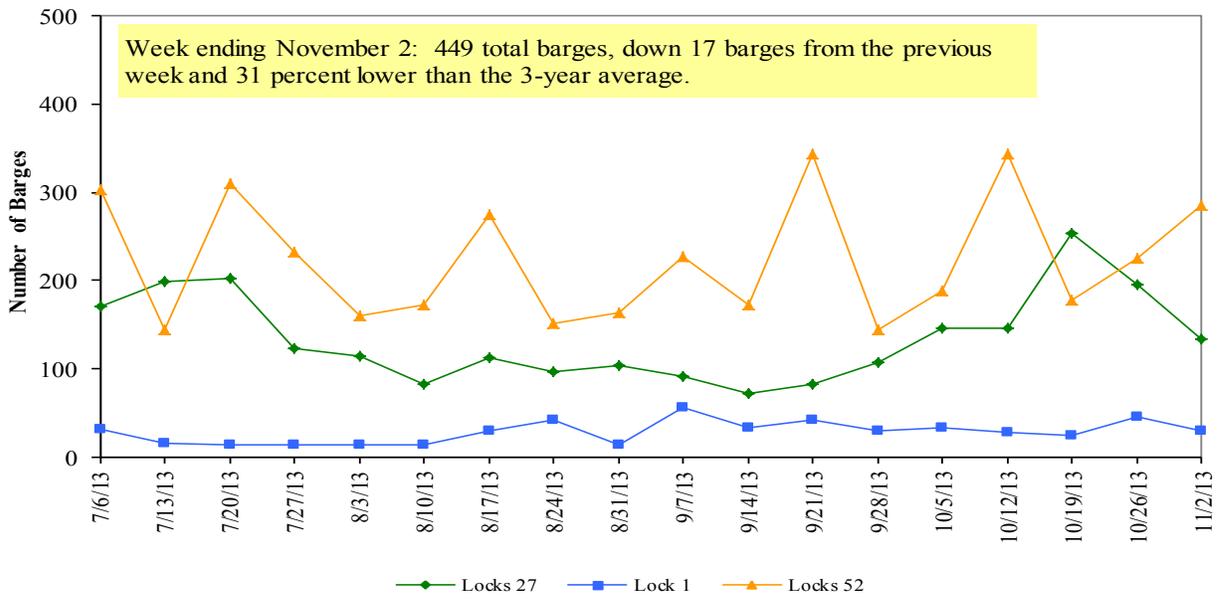
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

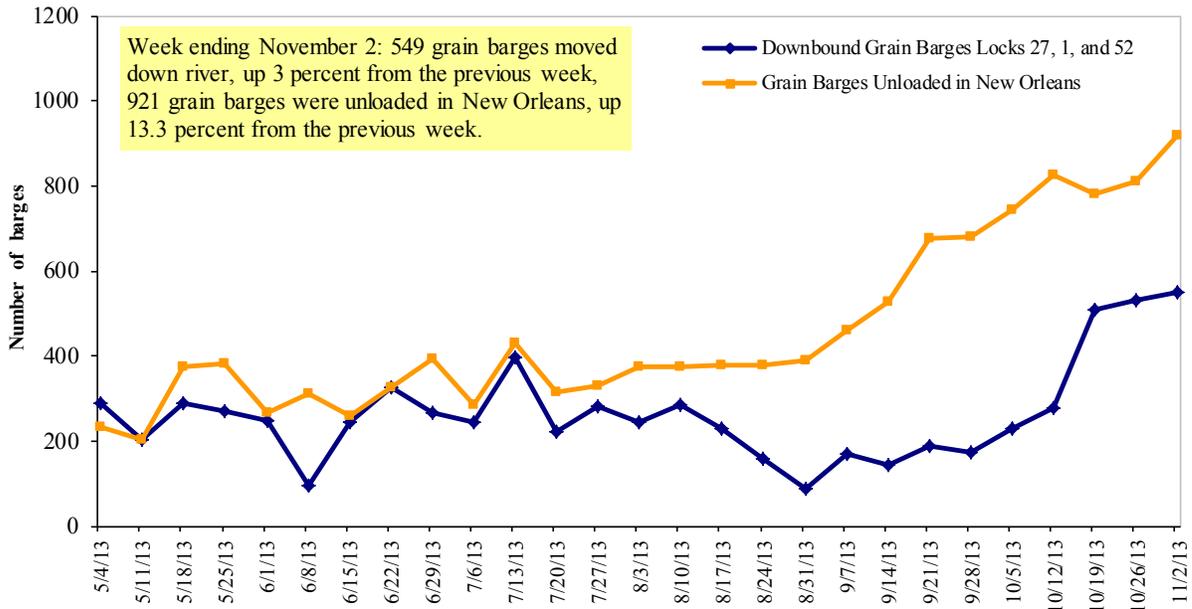
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

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



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

# Truck Transportation

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

Table 11

## Retail on-Highway Diesel Prices<sup>1</sup>, Week Ending 11/4/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.878	-0.011	-0.156
	New England	4.008	-0.012	-0.203
	Central Atlantic	3.938	-0.013	-0.217
	Lower Atlantic	3.808	-0.010	-0.102
II	Midwest <sup>2</sup>	3.826	-0.011	-0.133
III	Gulf Coast <sup>3</sup>	3.769	-0.014	-0.151
IV	Rocky Mountain	3.857	-0.008	-0.303
V	West Coast	4.015	-0.021	-0.138
	West Coast less California	3.923	-0.018	-0.145
	California	4.092	-0.025	-0.133
Total	U.S.	3.857	-0.013	-0.153

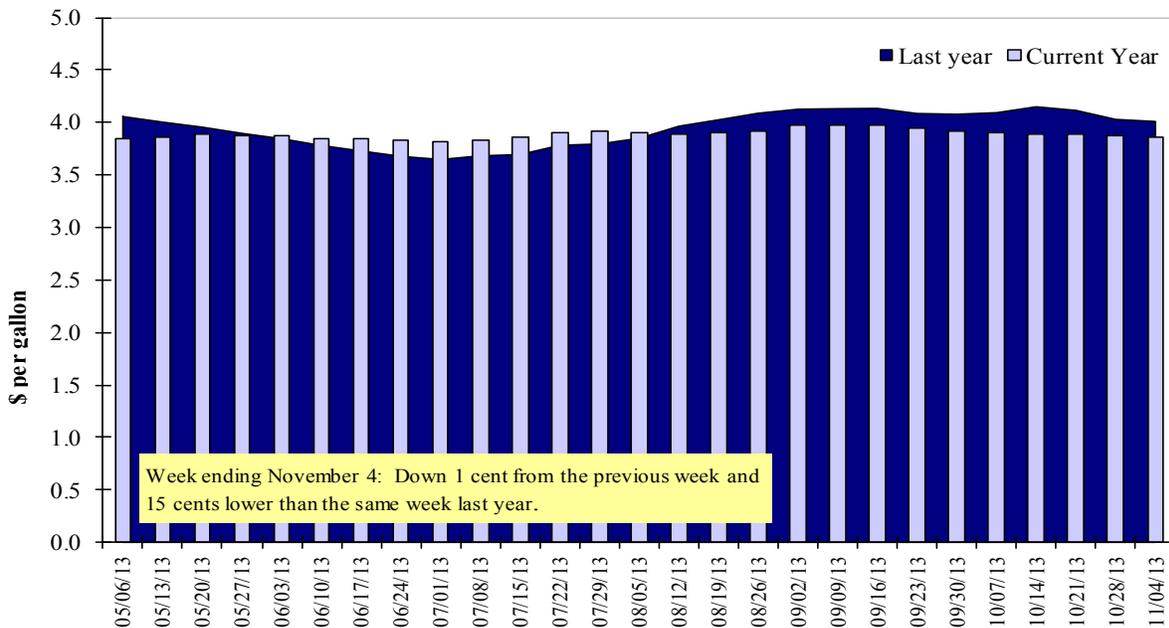
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
10/24/2013	1,630	1,140	1,322	957	72	5,120	16,105	25,287	46,512
This week year ago	1,510	611	1,252	829	95	4,296	7,195	17,699	29,190
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2013/14 YTD	6,065	4,837	2,502	1,790	178	15,371	4,428	6,942	26,741
2012/13 YTD	4,207	1,452	2,601	1,908	241	10,410	3,716	8,057	22,183
YTD 2013/14 as % of 2012/13	144	333	96	94	74	148	119	86	121
Last 4 wks as % of same period 2012/13	54	114	51	55	42	61	103	72	78
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 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 10/24/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,075	3,117	(1)	7,000
Mexico	5,863	2,677	119	4,370
China	4,442	918	384	2,450
Venezuela	232	194	19	1,158
Taiwan	284	181	57	512
<b>Top 5 Importers</b>	<b>13,894</b>	<b>7,086</b>	<b>96</b>	<b>15,490</b>
<b>Total US corn export sales</b>	<b>20,533</b>	<b>10,911</b>	<b>88</b>	<b>18,670</b>
% of Projected	66%	58%		
Change from prior week	n/a	n/a		
<b>Top 5 importers' share of U.S. corn export sales</b>	68%	65%		83%
<b>USDA forecast, September 2013</b>	<b>31,120</b>	<b>18,670</b>	<b>67</b>	
<b>Corn Use for Ethanol USDA forecast, September 2013</b>	<b>124,460</b>	<b>118,110</b>	<b>5</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 10/24/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	20,090	15,724	28	21,522
Mexico	1,086	962	13	2,565
Japan	713	354	101	1,751
Indonesia	668	394	70	1,682
Taiwan	758	584	30	1,120
<b>Top 5 importers</b>	<b>23,315</b>	<b>18,018</b>	<b>29</b>	<b>28,641</b>
<b>Total US soybean export sales</b>	<b>32,229</b>	<b>25,755</b>	<b>25</b>	<b>37,060</b>
% of Projected	86%	72%		
Change from prior week	n/a	n/a		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>72%</b>	<b>70%</b>		
<b>USDA forecast, September 2013</b>	<b>37,290</b>	<b>35,790</b>	<b>4</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)

n/a, data not available due to two week government shutdown

Table 15

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

Week Ending 10/24/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,454	1,956	(26)	3,544
Nigeria	1,568	1,763	(11)	3,002
Mexico	1,913	1,969	(3)	2,761
Philippines	1,122	1,341	(16)	1,965
Egypt	131	58	125	1,678
Korea	831	950	(13)	1,385
Taiwan	515	654	(21)	1,038
China	4,025	410	882	743
Brazil	3,122	46	6686	527
Colombia	439	370	19	600
<b>Top 10 importers</b>	<b>15,119</b>	<b>9,517</b>	<b>59</b>	<b>17,243</b>
<b>Total US wheat export sales</b>	<b>19,183</b>	<b>13,061</b>	<b>47</b>	<b>26,348</b>
% of Projected	64%	48%		
Change from prior week	n/a	n/a		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>79%</b>	<b>73%</b>		<b>65%</b>
<b>USDA forecast, September 2013</b>	<b>29,940</b>	<b>27,420</b>	<b>9</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 10/31/13	Previous Week <sup>1</sup>	Current Week as % of Previous	2013 YTD <sup>1</sup>	2012 YTD <sup>1</sup>	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2012
							2012	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	82	196	42	10,138	11,367	89	197	117	12,625
Corn	1	2	75	1,387	5,060	27	371	16	5,512
Soybeans	693	680	102	6,150	8,205	75	89	91	10,347
<b>Total</b>	<b>776</b>	<b>877</b>	<b>89</b>	<b>17,674</b>	<b>24,632</b>	<b>72</b>	<b>109</b>	<b>96</b>	<b>28,484</b>
<b>Mississippi Gulf</b>									
Wheat	48	60	81	8,954	4,899	183	254	258	5,462
Corn	517	535	97	11,620	16,409	71	160	106	18,068
Soybeans	1,121	1,074	104	12,894	17,803	72	98	111	24,684
<b>Total</b>	<b>1,686</b>	<b>1,669</b>	<b>101</b>	<b>33,468</b>	<b>39,111</b>	<b>86</b>	<b>125</b>	<b>118</b>	<b>48,215</b>
<b>Texas Gulf</b>									
Wheat	61	176	35	7,998	5,276	152	200	124	5,912
Corn	0	0	n/a	163	336	49	0	0	336
Soybeans	114	197	58	551	389	142	85	109	626
<b>Total</b>	<b>175</b>	<b>373</b>	<b>47</b>	<b>8,713</b>	<b>6,000</b>	<b>145</b>	<b>141</b>	<b>111</b>	<b>6,874</b>
<b>Interior</b>									
Wheat	4	12	30	943	1,062	89	234	95	1,218
Corn	232	117	197	2,802	5,762	49	195	118	6,115
Soybeans	153	174	88	2,573	3,680	70	170	92	4,204
<b>Total</b>	<b>388</b>	<b>304</b>	<b>128</b>	<b>6,318</b>	<b>10,504</b>	<b>60</b>	<b>91</b>	<b>102</b>	<b>11,538</b>
<b>Great Lakes</b>									
Wheat	0	9	0	680	411	165	53	34	481
Corn	0	0	n/a	0	56	0	n/a	0	56
Soybeans	99	71	140	328	446	74	85	85	713
<b>Total</b>	<b>99</b>	<b>80</b>	<b>124</b>	<b>1,009</b>	<b>913</b>	<b>110</b>	<b>77</b>	<b>66</b>	<b>1,250</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	641	341	188	123	102	341
Corn	47	12	400	195	139	141	2,345	257	143
Soybeans	15	72	21	840	790	106	148	132	1,460
<b>Total</b>	<b>62</b>	<b>84</b>	<b>74</b>	<b>1,676</b>	<b>1,269</b>	<b>132</b>	<b>234</b>	<b>159</b>	<b>1,944</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	195	452	43	29,354	23,355	126	195	137	26,040
Corn	797	666	120	16,166	27,761	58	170	105	30,230
Soybeans	2,195	2,267	97	23,336	31,312	75	95	102	42,035
<b>Total</b>	<b>3,187</b>	<b>3,385</b>	<b>94</b>	<b>68,857</b>	<b>82,428</b>	<b>84</b>	<b>122</b>	<b>109</b>	<b>98,305</b>

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

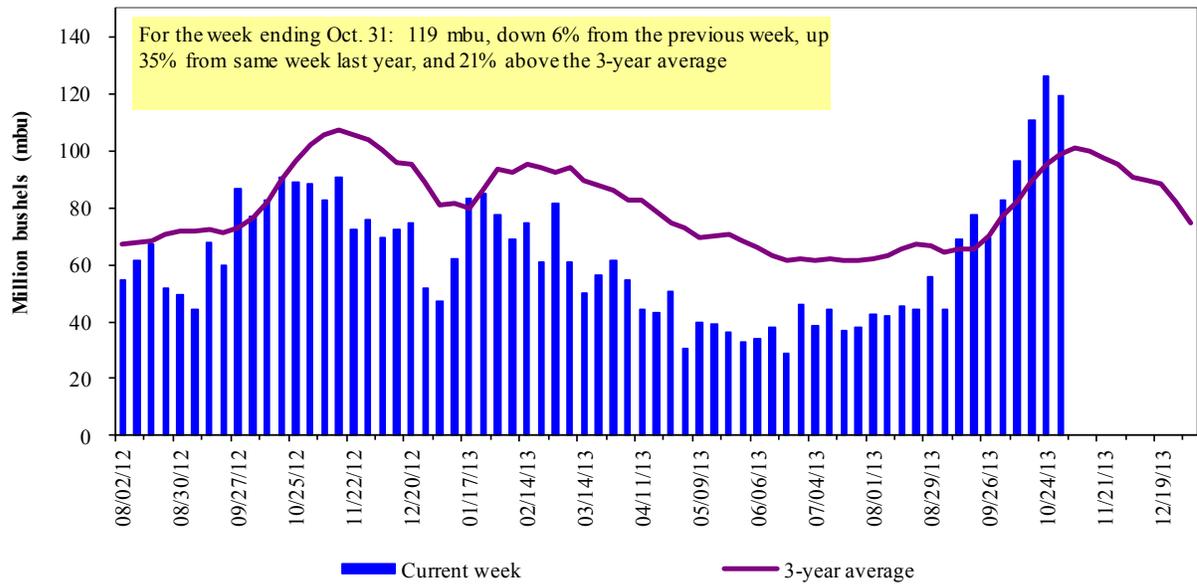
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

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

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

Figure 14

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

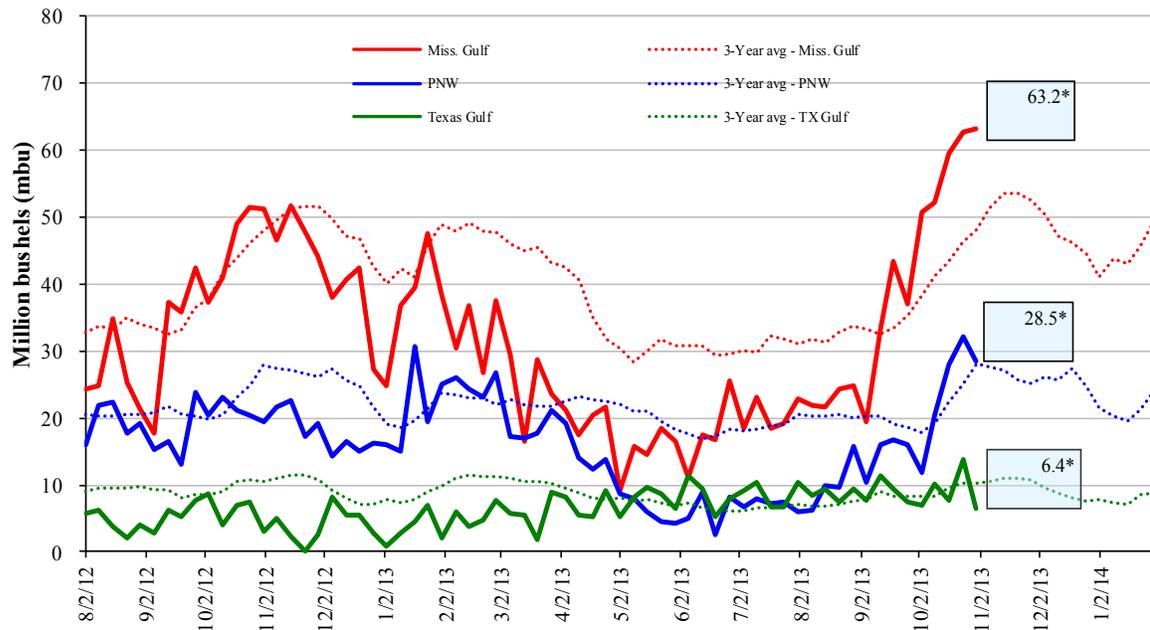


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

Oct. 31 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 1	down 53	down 9	down 11
Last year (same week)	up 24	up 108	up 29	up 48
3-yr avg (4-wk mov. avg)	up 29	down 20	up 22	up 13

# Ocean Transportation

Table 17

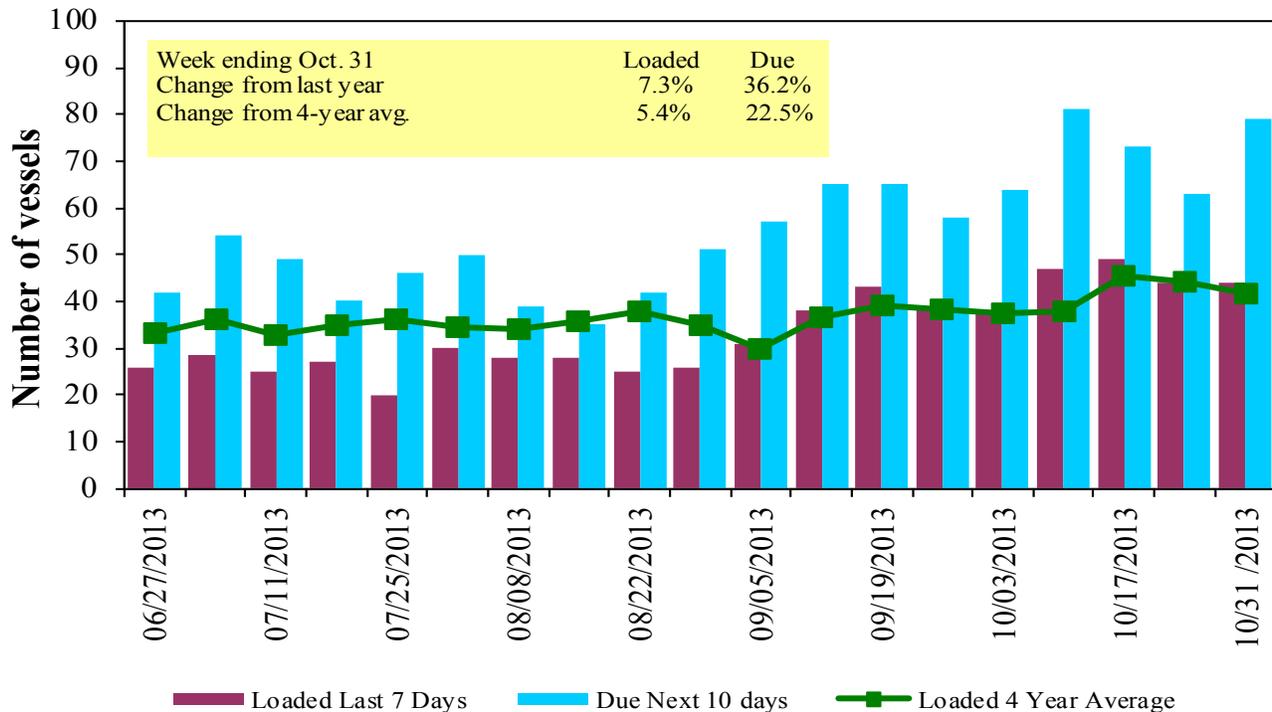
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
10/31/2013	40	44	79	15	n/a
10/24/2013	56	44	63	20	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

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

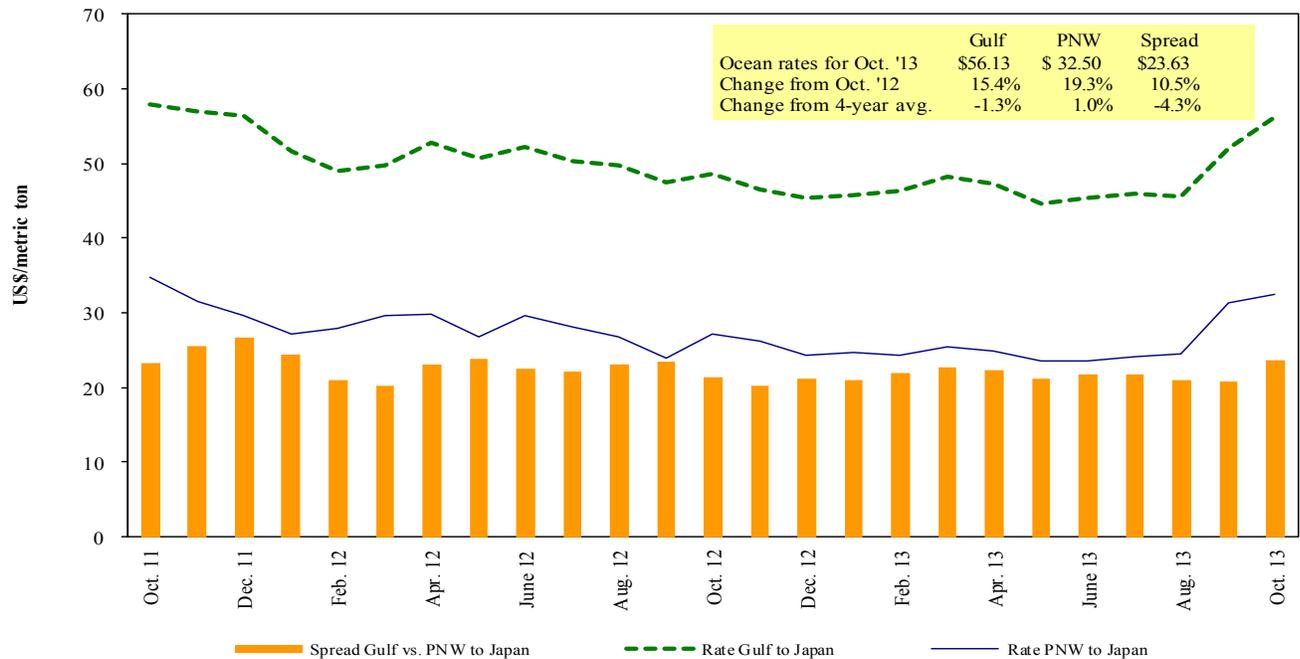


Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 17

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



Source: O'Neil Commodity Consulting

Table 18

## Ocean Freight Rates For Selected Shipments, Week Ending 11/02/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	45.00
U.S. Gulf	China	Heavy Grain	Nov 15/18	55,000	54.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	55,000	53.00
U.S. Gulf	China	Heavy Grain	Nov 1/7	53,000	52.50
U.S. Gulf	China	Heavy Grain	Nov-Dec	55,000	49.50
U.S. Gulf	China	Heavy Grain	Oct 1/Dec 31	55,000	33.00
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Nov 4/14	23,300	126.92
Brazil	China	Heavy Grain	Aug 20/30	60,000	34.25
Brazil	China	Heavy Grain	Aug 1/15	60,000	34.75
Brazil	Indonesia	Grain	Sep 29/Oct 4	73,000	29.10
Brazil	Morocco	Corn	Oct 25/Nov 5	29,000	20.50
Brazil	Morocco	Corn	Sep 25/30	30,000	20.00
Brazil	S. Korea	Heavy Grain	Aug 14/19	60,000	35.50
France	Algeria	Wheat	Sep 20/30	25,000	25.00
France	Algeria	Wheat	Sep 15/25	25,000	23.75
France	Saudi Arabia	Barley	Aug 1/5	64,000	29.50
Germany	South Africa	Wheat	Aug 20/25	31,000	33.50
River Plate	China	Heavy Grain	Aug 1/10	60,000	39.50
Russia	Saudi Arabia	Barley	Aug 15/20	60,000	23.75
Ukraine	Italy	Corn	Oct 30/31	25,000	26.00

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

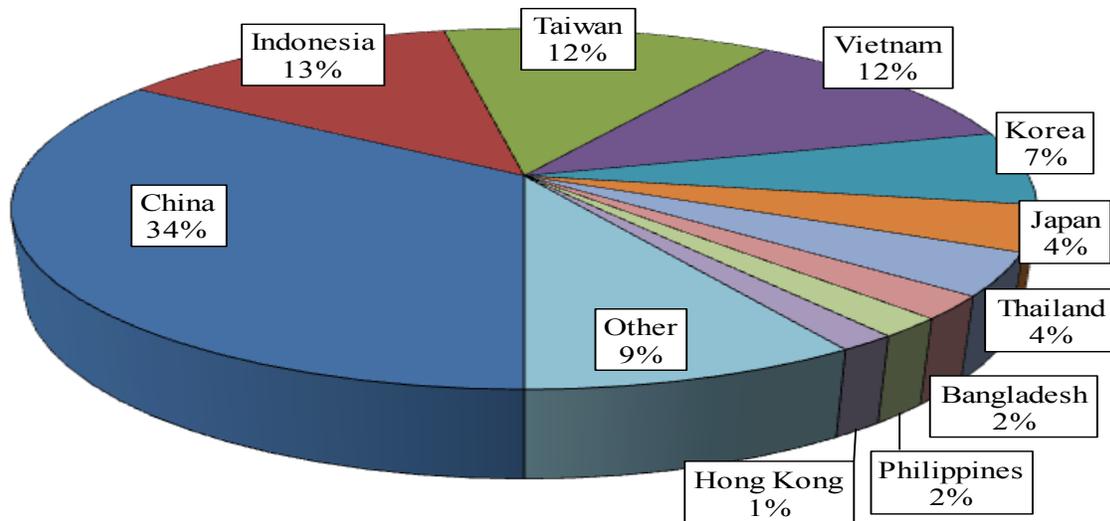
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, May 2013**

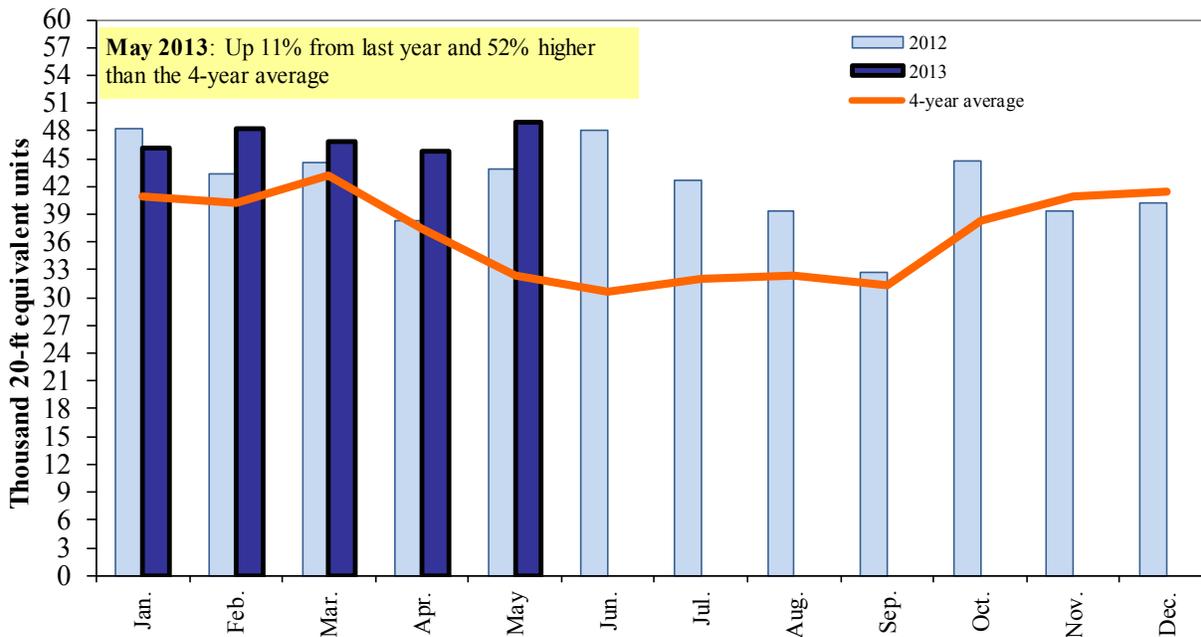


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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

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