



# Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division  
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Dec. 26, 2013

## WEEKLY HIGHLIGHTS

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### Adverse Navigation Conditions Continue to Limit Barge Movements

Weather has further decreased the volume of barge shipments on the Mississippi and Illinois Rivers. Barge movements for the first three weeks of December averaged 745 thousand tons per week, lower than the weekly average of 881 thousand tons for the last 3 weeks of November. Cold weather continues to favor moderate ice accumulations on the Illinois River, forcing traffic restrictions and affecting navigation to a greater extent than normal. Further down the river, barge traffic is also being restricted in the St. Louis, MO, area because of dredging to alleviate low water conditions. For the week beginning December 22, the St. Louis water levels were in the -1 foot range. Last year at this time, the St. Louis gage was in the -2 to -3 foot range. Because of low water conditions, barges must load lighter than under normal conditions.

### Total Grain Inspections Increase

For the week ending December 19, **total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 2.9 million metric tons (mmt), up 4 percent from the previous week, 45 percent above last year at this time, and 23 percent above the 3-year average. The increase was driven by a rebound in wheat and corn inspections due to increased export demand. Total inspections of corn for export reached .906 mmt, up 46 percent from the past week and 157 percent above last year at this time. The increase was driven by a 113-percent jump in Mississippi Gulf corn inspections (.569 mmt), which were shipped primarily to Asia and Mexico. Total wheat inspections (.522 mmt) increased 9 percent from the past week. Outstanding (unshipped) export sales of corn and wheat also increased from the previous week. Inspections and outstanding sales of soybeans were down from the past week.

### Oregon Governor Helps Resolve Labor Dispute at the Port of Portland

On December 12, Oregon Governor John Kitzhaber announced the resolution of a longstanding dispute over which union would employ workers to plug and unplug refrigerated shipping containers at the Port of Portland. The work was awarded to the International Longshore and Warehouse Union (ILWU) with the provision that productivity at the port improves. Since the dispute began in 2012, port productivity has been reportedly slower. As a result, Hanjin Shipping Co., the largest ocean container carrier serving the port, recently announced they would stop serving the port in January due to reduced productivity. It is unclear at this time whether Hanjin will reconsider servicing to the port based on the new resolution. Without vessel service from Hanjin, exporters of peas, lentils, and hay in the region will have to truck products to the port of Seattle or Tacoma, WA, which could cost exporters an additional \$400 per container.

## Snapshots by Sector

### **Rail**

U.S. railroads originated 20,667 **carloads of grain** during the week ending December 14, up 0.5 percent from last week, up 2 percent from last year, and down 6 percent from the 3-year average.

During the week ending December 19, average January non-shuttle **secondary railcar bids/offers per car** were \$650 above tariff, up \$225 from last week and \$637.50 higher than last year. Average shuttle bids/offers were \$1,700 per car above tariff, up \$925 from last week and \$1,662 higher than last year.

### **Barge**

During the week ending December 21, **barge grain movements** totaled 707,048 tons, 7 percent lower than the previous week but 60.5 percent higher than the same period last year.

During the week ending December 21, 457 grain barges **moved down river**, down 14.3 percent from last week; 871 grain barges were **unloaded in New Orleans**, up 9 percent from the previous week.

### **Ocean**

During the week ending December 19, 41 **ocean-going grain vessels** were loaded in the Gulf, 64 percent more than the same period last year. Sixty-nine vessels are expected to be loaded within the next 10 days, 57 percent more than the same period last year.

During the week ending December 20, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$58.00 per mt, down 1 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$29.50 per mt, down 3 percent from the previous week.

### **Fuel**

During the week ending December 23, U.S. average **diesel fuel prices** were unchanged from the previous week at \$3.87 per gallon, 5 cents lower than the same week last year.

# Feature Article/Calendar

To Our Readers:

We sincerely thank our readers for your continued support. We strive to provide information in the GTR that is insightful, timely, and reliable. This year we released several agricultural transportation research articles focusing on rail and ocean ports. We also provided easier access to these publications by improving the Agricultural Transportation Research and Information Center portion of our website.

## **2013 Agricultural Transportation Overview**

Agricultural markets in the first three quarters of the year experienced low export numbers due to last year's historic drought, followed by strong soybean exports, then record corn production during the fourth quarter. During the harvest season, the U.S. transportation system continued to keep U.S. grain and oilseeds moving to world markets but experienced limited setbacks as surging demand for transportation services strained carriers' supply capacity. Some of the top 2013 stories help illustrate the relationship between agricultural production, marketing, and transportation:

- By December 19, 2013, year-to-date grain exports were 8 percent lower than in 2012 as a result of last year's drought-impacted crops. Nevertheless, there was a surge in export activity late in the year. Since October 3, grain exports have been 37 percent higher than they were during the same period last year, corn exports 110 percent higher, wheat 42 percent higher, and soybeans 17 percent higher, reflecting this year's record harvest.
- While the year began with low-water conditions on the Mississippi River, water levels began to increase significantly in March and reached flood levels in certain areas by mid-year. Even with the extreme fluctuations in water levels, barge freight rates were generally below average for the first 8 months of the year. However, with the active corn and soybean harvest and a return to low-water conditions, barge rates began to increase to above-average levels in September and peaked by mid-November. Since then, barge rates have decreased, but are still above average as barge operators must light-load barges in the reduced water levels.
- In the beginning of the year, the U.S. Army Corps of Engineers successfully removed submerged rock formations near Thebes, IL, that threatened to block navigation on the Mississippi River. As the year closes, the Corps is again working in the Thebes area to make permanent improvements to the navigation channel by removing additional rock formations.
- Despite lower volumes in the first half of the year, Mississippi Gulf exports are expected to end the year only 4 to 5 percent lower than last year.
- Prior to October, weekly rail volumes of grain in 2013 were among the lowest on record since 1995, with volumes averaging 25 percent below the 3-year weekly average, reflecting smaller grain inventories from the 2012 drought.
- Beginning in October, a record corn harvest and strong soybean exports brought weekly grain carloadings to their highest point since January 2011. However, rail service disruptions, coupled with the ongoing high demand for empty grain cars, led to record high prices for available grain cars in October and December in the secondary railcar market as rail capacity became strained.
- During 2013, ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged \$48.75 per metric ton (mt), 1 percent lower than last year. The cost of shipping from the Pacific Northwest (PNW) to Japan was \$29.50/mt, 3 percent lower than last year. Ocean freight rates for shipping bulk commodities appear to be surging in the last quarter, but the market is still uncertain. Although the gap between vessel supply and demand is narrowing, excess tonnage is still available in the market.

## **Happy New Year**

We are thankful for our many blessings and look forward to providing the GTR in the upcoming year to help you make informed marketing and transportation decisions. We appreciate and thank the many industry and Government representatives who regularly and voluntarily provide us with the necessary information and data included in this report. We wish you a healthy and prosperous New Year!

Sincerely,

The Grain Transportation Report Team

# Grain Transportation Indicators

Table 1

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

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
12/25/13	260	275	287	328	259	209
12/18/13	260	272	297	321	266	223

<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)**

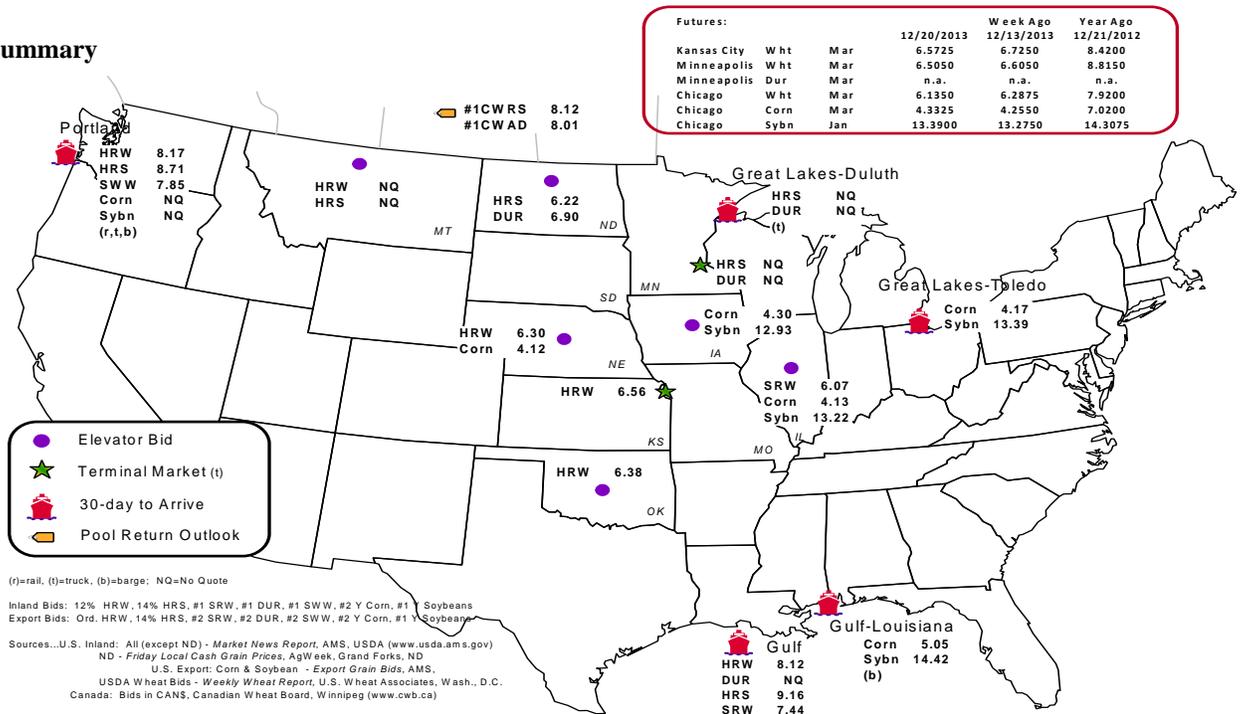
Commodity	Origin--Destination	12/20/2013	12/13/2013
Corn	IL--Gulf	-0.92	-0.92
Corn	NE--Gulf	-0.93	-0.94
Soybean	IA--Gulf	-1.49	-1.50
HRW	KS--Gulf	-1.56	-1.45
HRS	ND--Portland	-2.49	-2.27

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			
12/18/2013 <sup>p</sup>	1,220	1,165	5,408	904	8,697	12/14/13	1,778
12/11/2013 <sup>r</sup>	1,797	993	4,592	1,418	8,800	12/07/13	1,339
2013 YTD <sup>r</sup>	30,172	70,711	163,581	24,461	288,925	2013 YTD	68,501
2012 YTD <sup>r</sup>	21,202	40,270	195,598	23,856	280,926	2012 YTD	90,821
2013 YTD as % of 2012 YTD	142	176	84	103	103	% change YTD	75
Last 4 weeks as % of 2012 <sup>2</sup>	126	154	147	125	141	Last 4wks % 2012	141
Last 4 weeks as % of 4-year avg. <sup>2</sup>	163	96	129	136	128	Last 4wks % 4 yr	113
Total 2012	22,604	40,780	199,419	49,120	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.

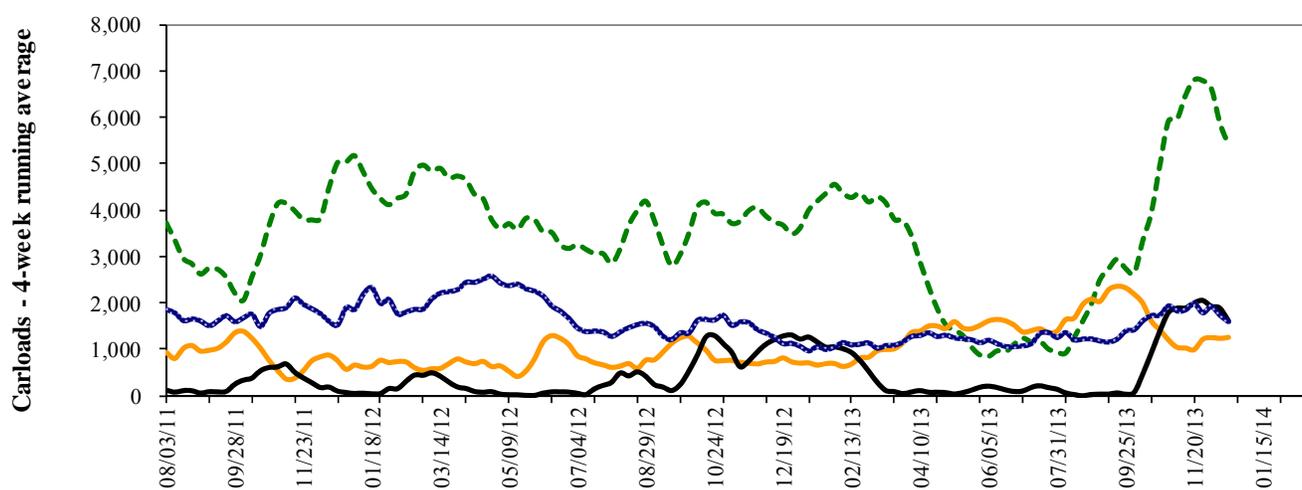
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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



--- Pacific Northwest: 4 wks. ending 12/18--up 47% from same period last year; up 29% from 4-year average  
--- Texas Gulf: 4 wks. ending 12/18--up 54% from same period last year; down 4% from 4-year average  
--- Miss. River: 4 wks. ending 12/18--up 26% from same period last year; up 63% from 4-year average  
--- Cross-border Mexico: 4 wks. ending 12/14--up 41% from same period last year; up 13% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

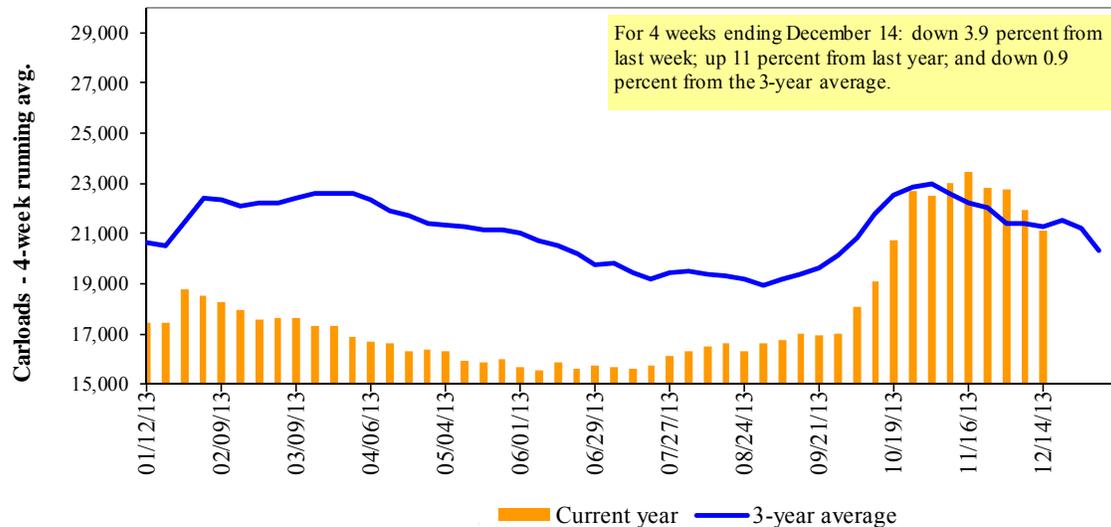
Table 4

**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
12/14/13	2,412	3,077	8,800	1,106	5,272	20,667	3,678	4,906
This week last year	1,757	3,082	10,625	424	4,454	20,342	4,256	6,683
2013 YTD	82,463	131,656	437,962	32,751	211,250	896,082	182,510	263,887
2012 YTD	82,864	140,615	497,279	26,066	237,127	983,951	196,587	255,716
2013 YTD as % of 2012 YTD	100	94	88	126	89	91	93	103
Last 4 weeks as % of 2012	148	114	90	143	141	111	111	87
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	123	114	82	144	113	99	111	96
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							
	Jan-14	Jan-13	Feb-14	Feb-13	Mar-14	Mar-13	Apr-14	Apr-13
<b>12/19/2013</b>								
BNSF <sup>3</sup>								
COT grain units	no offer	1	no offer	1	no offer	1	262	no bids
COT grain single-car <sup>5</sup>	no offer	6 .. 11	no offer	0 .. 10	no offer	0 .. 1	27 .. 150	0
UP <sup>4</sup>								
GCAS/Region 1	1	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	297	no bids	76	no bids	11	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.

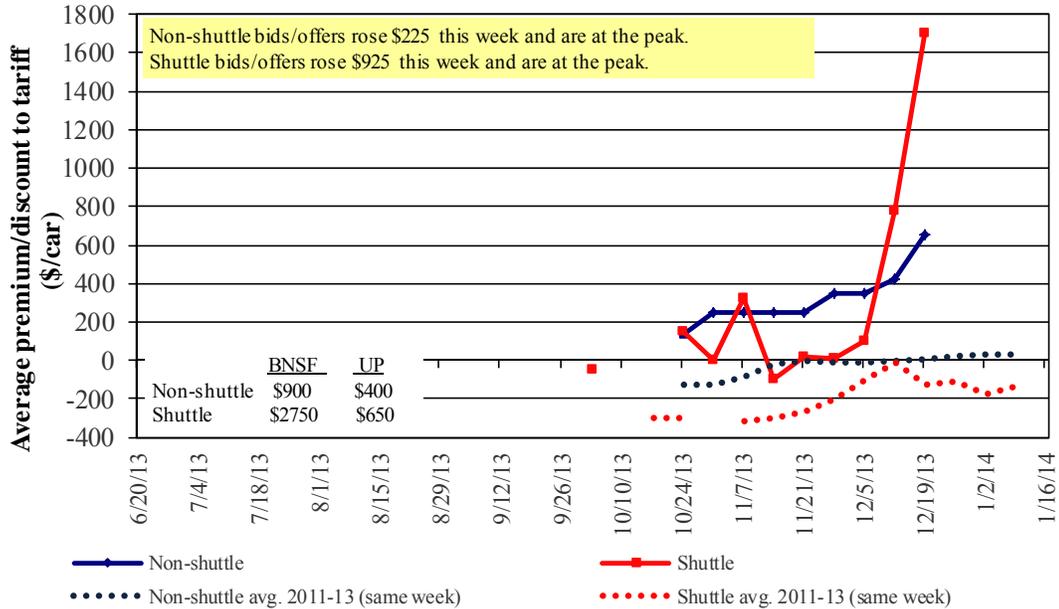
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 January 2014, Secondary Market**

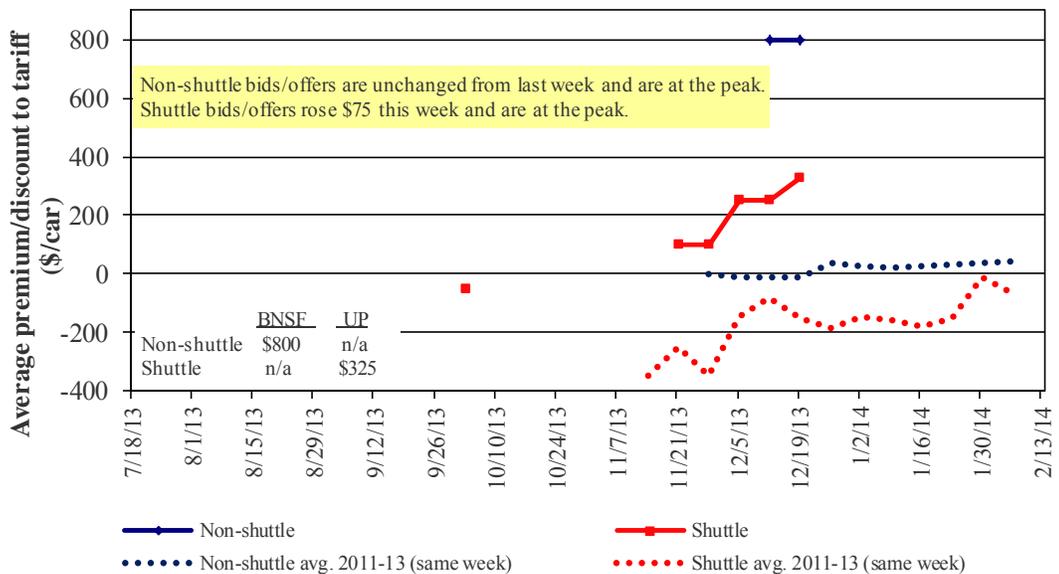


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

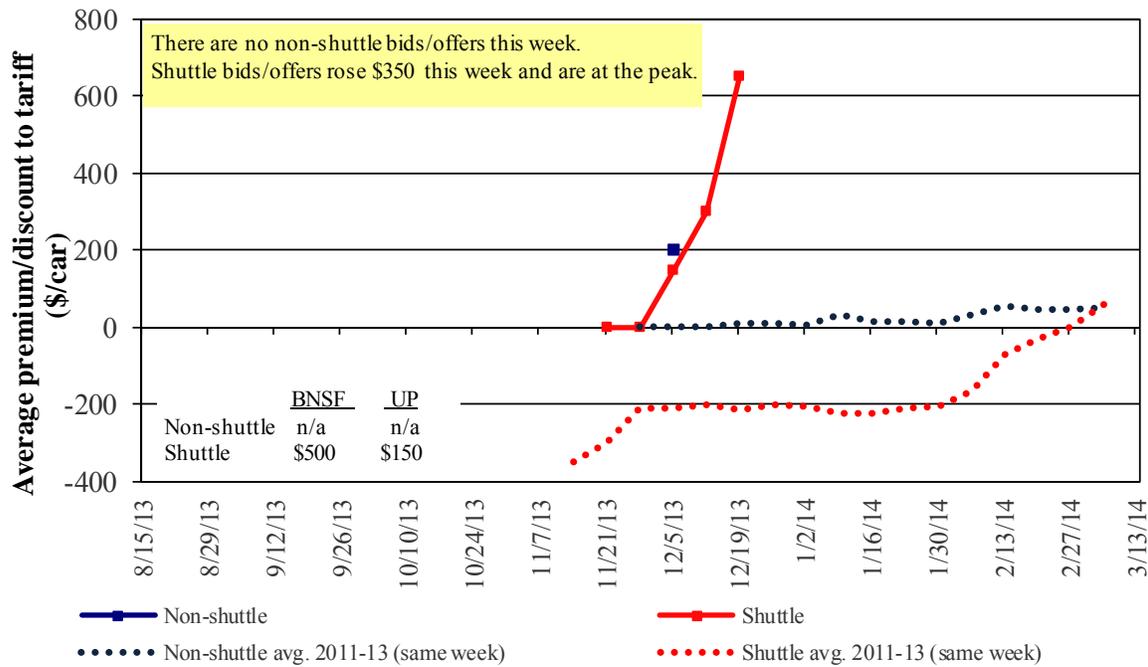


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in March 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					
	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14
<b>Non-shuttle</b>						
BNSF-GF	900	800	n/a	n/a	n/a	n/a
Change from last week	200	-	n/a	n/a	n/a	n/a
Change from same week 2012	875	n/a	n/a	n/a	n/a	n/a
UP-Pool	400	n/a	n/a	n/a	n/a	n/a
Change from last week	250	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	400	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	2,750	n/a	500	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 2012	2,737	n/a	n/a	n/a	n/a	n/a
UP-Pool	650	325	150	(100)	(100)	(100)
Change from last week	(125)	75	(150)	25	50	-
Change from same week 2012	587	300	150	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
12/1/2013	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	\$3,191	\$182	\$33.50	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$104	\$36.75	\$1.00	4
	Wichita, KS	Los Angeles, CA	\$6,244	\$536	\$67.32	\$1.83	2
	Wichita, KS	New Orleans, LA	\$3,808	\$320	\$41.00	\$1.12	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$440	\$62.20	\$1.69	3
	Northwest KS	Galveston-Houston, TX	\$4,076	\$351	\$43.96	\$1.20	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$489	\$47.30	\$1.29	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$362	\$35.29	\$0.90	1
	Toledo, OH	Raleigh, NC	\$4,686	\$416	\$50.66	\$1.29	3
	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	1
	Des Moines, IA	Los Angeles, CA	\$5,215	\$656	\$58.30	\$1.48	1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,599	\$395	\$39.66	\$1.08	1
	Toledo, OH	Huntsville, AL	\$3,687	\$295	\$39.55	\$1.08	2
	Indianapolis, IN	Raleigh, NC	\$4,756	\$419	\$51.39	\$1.40	3
	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	3
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$308	\$39.58	\$1.08	4
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$240	\$40.10	\$1.09	3
	Chicago, IL	Albany, NY	\$3,950	\$390	\$43.10	\$1.17	3
	Grand Forks, ND	Portland, OR	\$5,159	\$532	\$56.51	\$1.54	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$554	\$65.92	\$1.79	0
	Northwest KS	Portland, OR	\$5,043	\$576	\$55.80	\$1.52	3
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$648	\$56.09	\$1.42	2
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$593	\$55.15	\$1.40	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$362	\$33.50	\$0.85	3
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$346	\$38.29	\$0.97	4
	Des Moines, IA	Amarillo, TX	\$3,590	\$283	\$38.46	\$0.98	3
	Minneapolis, MN	Tacoma, WA	\$5,000	\$643	\$56.03	\$1.42	2
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,400	\$665	\$50.29	\$1.28	2
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$593	\$60.71	\$1.65	2
	Minneapolis, MN	Portland, OR	\$5,530	\$648	\$61.35	\$1.67	2
	Fargo, ND	Tacoma, WA	\$5,430	\$527	\$59.16	\$1.61	2
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$418	\$45.61	\$1.24	6
	Toledo, OH	Huntsville, AL	\$2,862	\$295	\$31.35	\$0.85	3
	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, 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	\$6,360	\$563	\$70.73	\$1.92	-17
	OK	Cuautitlan, EM	\$6,156	\$684	\$69.88	\$1.90	-10
	KS	Guadalajara, JA	\$6,559	\$660	\$73.77	\$2.01	-12
	TX	Salinas Victoria, NL	\$2,898	\$258	\$32.24	\$0.88	-18
Corn	IA	Guadalajara, JA	\$7,974	\$777	\$89.41	\$2.27	2
	SD	Celaya, GJ	\$7,656	\$736	\$85.75	\$2.18	2
	NE	Queretaro, QA	\$7,317	\$690	\$81.81	\$2.08	1
	SD	Salinas Victoria, NL	\$5,880	\$560	\$65.80	\$1.67	2
	MO	Tlalnepantla, EM	\$6,755	\$670	\$75.87	\$1.93	1
	SD	Torreón, CU	\$6,722	\$617	\$74.98	\$1.90	2
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$655	\$87.08	\$2.37	2
	NE	Guadalajara, JA	\$8,447	\$749	\$93.96	\$2.55	2
	IA	El Castillo, JA	\$8,855	\$732	\$97.95	\$2.66	2
	KS	Torreón, CU	\$6,864	\$465	\$74.88	\$2.04	2
Sorghum	TX	Guadalajara, JA	\$6,764	\$479	\$74.01	\$1.88	1
	NE	Celaya, GJ	\$7,272	\$669	\$81.13	\$2.06	3
	KS	Queretaro, QA	\$7,005	\$420	\$75.86	\$1.93	7
	NE	Salinas Victoria, NL	\$5,628	\$492	\$62.52	\$1.59	7
	NE	Torreón, CU	\$6,328	\$549	\$70.26	\$1.78	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.

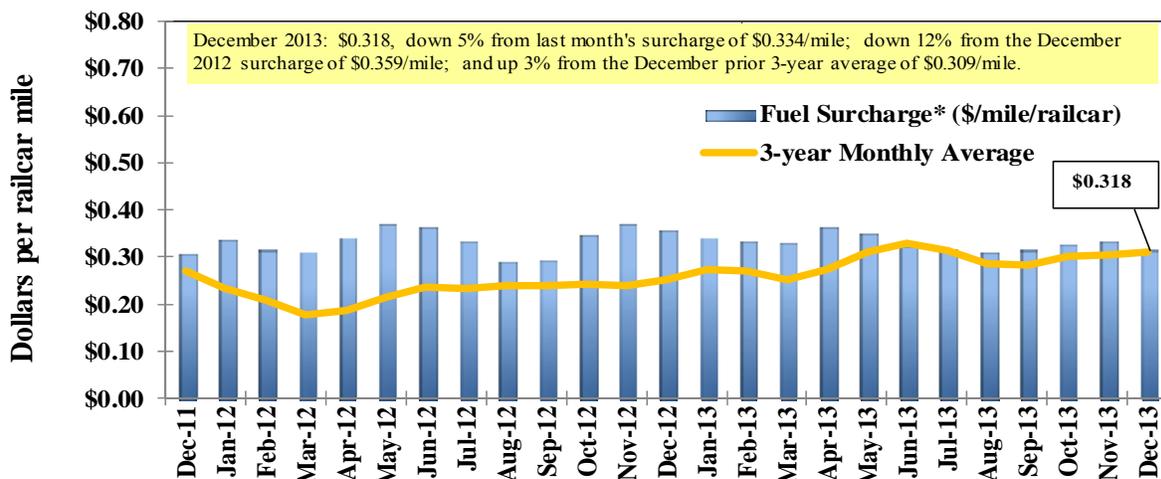
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

<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.

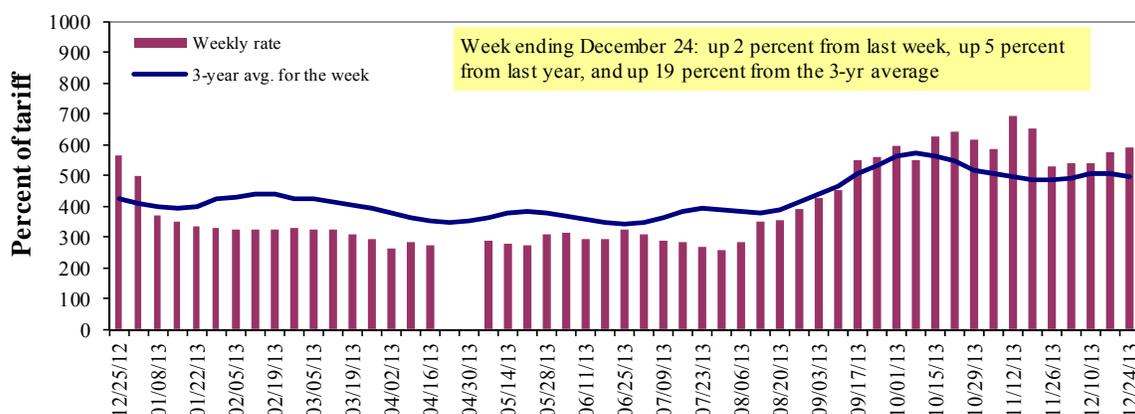
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	12/24/2013	--	--	590	490	428	428	308
	12/17/2013	--	--	577	475	430	430	298
<b>\$/ton</b>	12/24/2013	--	--	27.38	19.55	20.07	17.29	9.67
	12/17/2013	--	--	26.77	18.95	20.17	17.37	9.36
<b>Current week % change from the same week:</b>								
	Last year	--	--	5	-2	4	4	-1
	3-year avg. <sup>2</sup>	--	--	19	24	1	1	-7
<b>Rate<sup>1</sup></b>	January	--	--	525	438	420	420	293
	March	--	412	408	358	378	378	270

<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

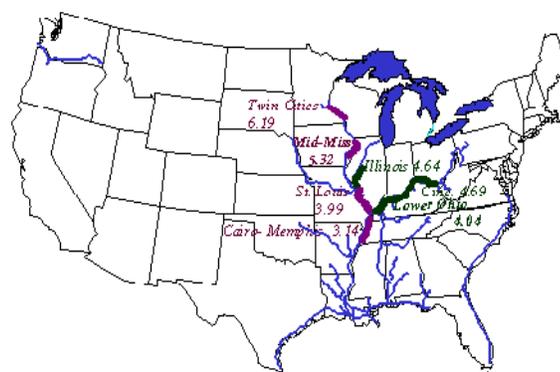
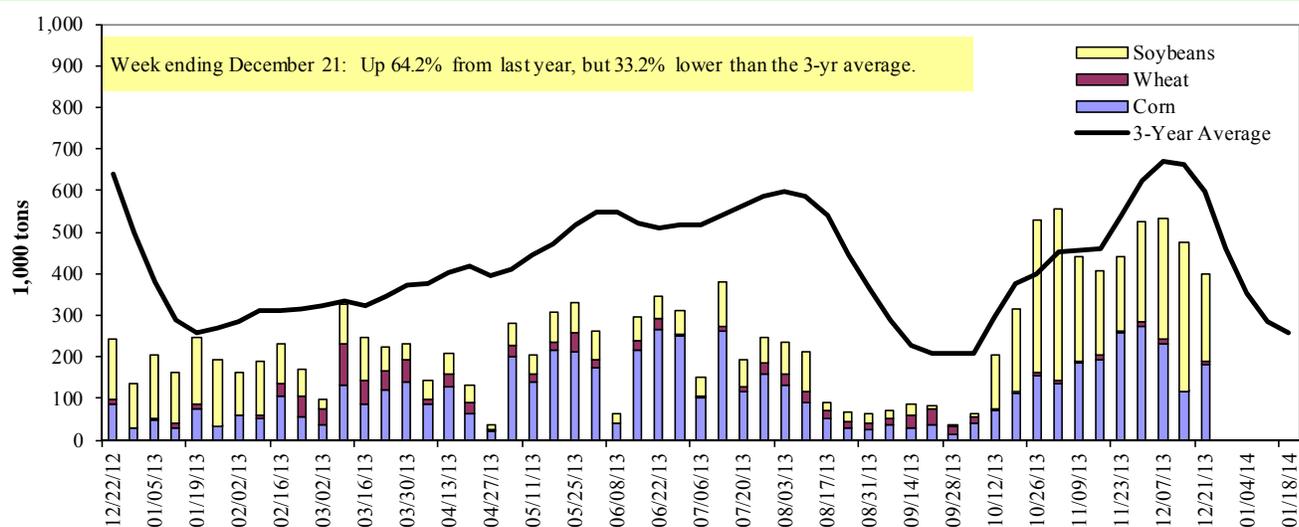


Figure 10

**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 12/21/2013	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	11	0	28	0	39
Alton, IL (L26)	159	6	160	3	327
Granite City, IL (L27)	183	6	210	3	402
<b>Illinois River (L8)</b>	116	6	143	3	268
<b>Ohio River (L52)</b>	129	11	106	5	251
<b>Arkansas River (L1)</b>	0	8	46	0	55
Weekly total - 2013	312	25	362	8	707
Weekly total - 2012	131	29	280	0	440
2013 YTD <sup>1</sup>	9,301	4,090	9,672	236	23,299
2012 YTD	14,778	1,781	12,409	229	29,197
2013 as % of 2012 YTD	63	230	78	103	80
Last 4 weeks as % of 2012 <sup>2</sup>	142	109	102	522	117
Total 2012	14,837	1,794	12,663	229	29,523

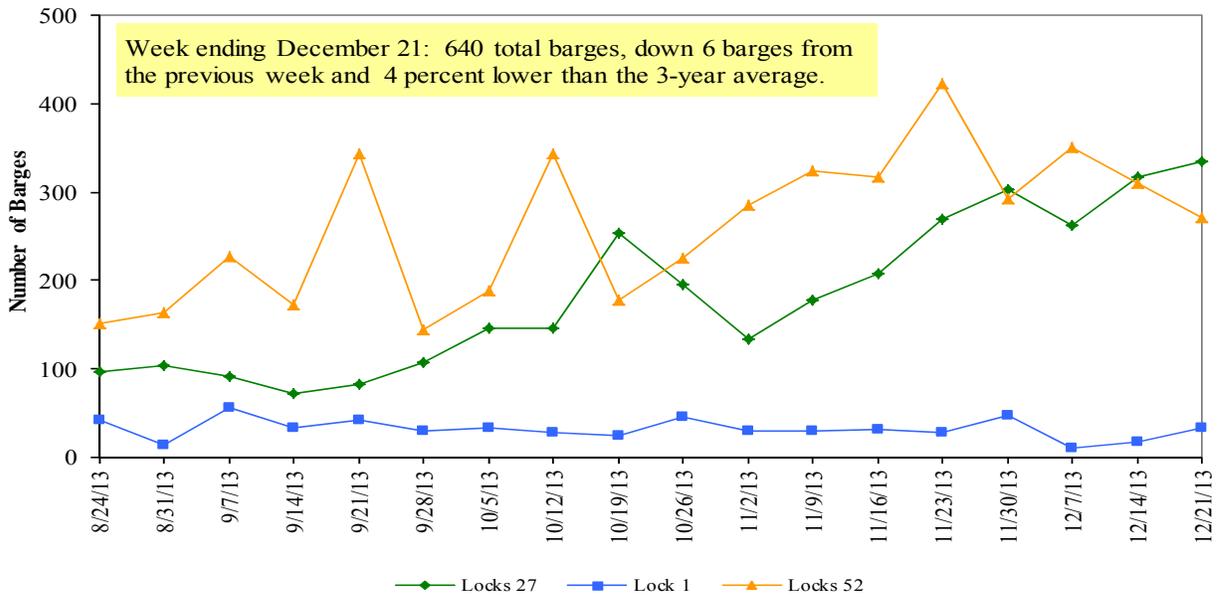
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

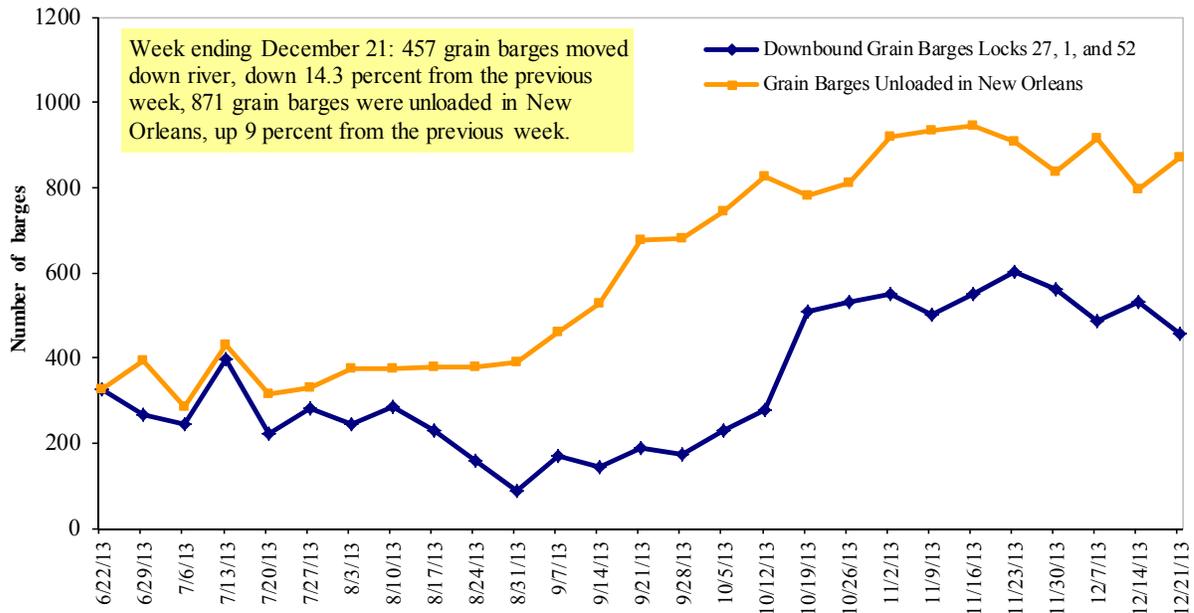
Source: U.S. Army Corps of Engineers

**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 12/23/2013 (US \$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.919	0.004	-0.087
	New England	4.069	0.005	-0.084
	Central Atlantic	3.988	0.011	-0.124
	Lower Atlantic	3.839	-0.001	-0.060
II	Midwest <sup>2</sup>	3.847	-0.005	-0.046
III	Gulf Coast <sup>3</sup>	3.772	0.006	-0.061
IV	Rocky Mountain	3.853	0.001	0.062
V	West Coast	3.985	0.003	-0.004
	West Coast less California	3.883	-0.001	-0.032
	California	4.073	0.007	0.021
Total	U.S.	3.873	0.002	-0.050

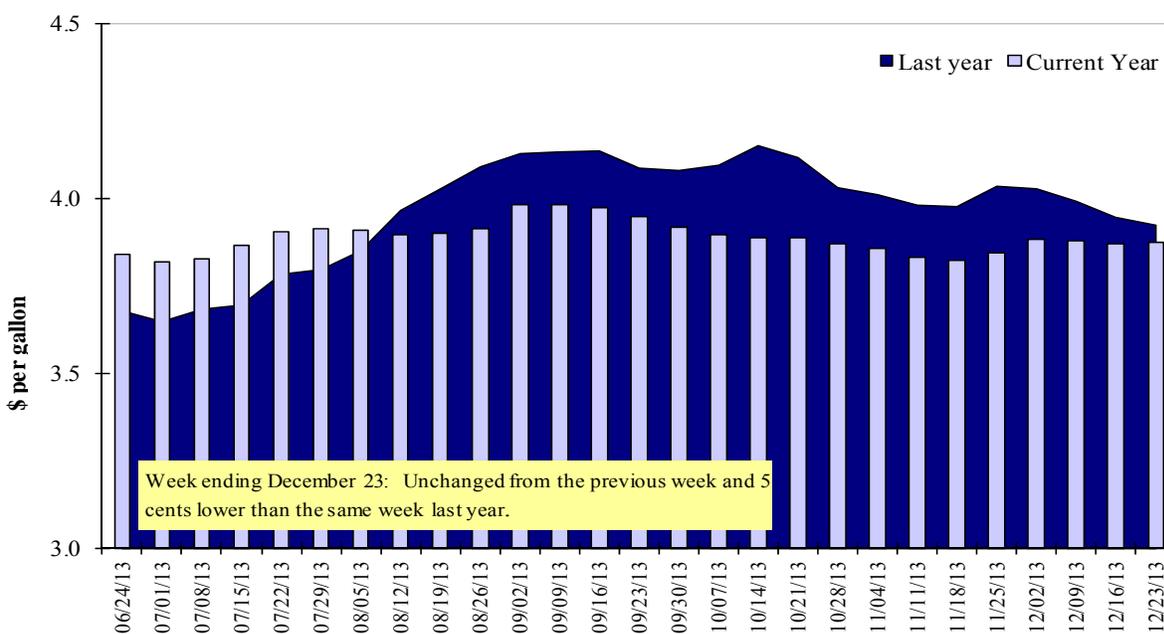
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
12/12/2013	1,571	1,073	1,659	978	95	5,376	17,751	18,550	41,677
This week year ago	1,453	846	1,287	1,223	94	4,904	6,511	11,435	22,850
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2013/14 YTD	7,233	5,462	3,080	2,245	238	18,258	9,772	20,492	48,522
2012/13 YTD	5,169	1,718	3,183	2,408	286	12,763	6,091	18,908	37,762
YTD 2013/14 as % of 2012/13	140	318	97	93	83	143	160	108	128
Last 4 wks as % of same period 2012/13	103	133	126	80	89	108	275	175	189
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 12/12/2013	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	4,440	4,048	10	7,000
Mexico	7,471	2,849	162	4,370
China	5,898	1,359	334	2,450
Venezuela	305	277	10	1,158
Taiwan	500	254	97	512
<b>Top 5 Importers</b>	<b>18,614</b>	<b>8,788</b>	<b>112</b>	<b>15,490</b>
<b>Total US corn export sales</b>	<b>27,523</b>	<b>12,603</b>	<b>118</b>	<b>18,670</b>
% of Projected	75%	68%		
Change from prior week	827	114		
<b>Top 5 importers' share of U.S. corn export sales</b>	68%	70%		83%
<b>USDA forecast, December 2013</b>	<b>36,896</b>	<b>18,601</b>	<b>98</b>	
<b>Corn Use for Ethanol USDA forecast, December 2013</b>	<b>125,730</b>	<b>118,059</b>	<b>6</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 12/12/2013	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	24,831	18,965	31	21,522
Mexico	1,712	1,291	33	2,565
Japan	992	1,016	(2)	1,751
Indonesia	1,024	568	80	1,682
Taiwan	880	740	19	1,120
<b>Top 5 importers</b>	<b>29,438</b>	<b>22,580</b>	<b>30</b>	<b>28,641</b>
<b>Total US soybean export sales</b>	<b>39,042</b>	<b>30,343</b>	<b>29</b>	<b>37,060</b>
% of Projected	97%	84%		
Change from prior week	341	620		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>75%</b>	<b>74%</b>		
<b>USDA forecast, December 2013</b>	<b>40,191</b>	<b>35,967</b>	<b>12</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 12/12/2013	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	1,839	2,534	(27)	3,544
Nigeria	2,059	2,039	1	3,002
Mexico	2,297	2,269	1	2,761
Philippines	1,345	1,545	(13)	1,965
Egypt	150	168	(11)	1,678
Korea	989	1,216	(19)	1,385
Taiwan	691	730	(5)	1,038
China	4,082	465	778	743
Brazil	3,331	63	5188	527
Colombia	483	447	8	600
<b>Top 10 importers</b>	<b>17,265</b>	<b>11,476</b>	<b>50</b>	<b>17,243</b>
<b>Total US wheat export sales</b>	<b>23,634</b>	<b>17,667</b>	<b>34</b>	<b>26,348</b>
% of Projected	79%	64%		
Change from prior week	656	651		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>73%</b>	<b>65%</b>		<b>65%</b>
<b>USDA forecast, December 2013</b>	<b>29,973</b>	<b>27,439</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 12/19/13	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	303	182	166	11,357	12,572	90	102	91	12,625
Corn	175	246	71	2,804	5,455	51	457	141	5,512
Soybeans	222	230	96	8,830	10,022	88	133	107	10,347
<b>Total</b>	<b>699</b>	<b>659</b>	<b>106</b>	<b>22,991</b>	<b>28,048</b>	<b>82</b>	<b>159</b>	<b>111</b>	<b>28,484</b>
<b>Mississippi Gulf</b>									
Wheat	56	111	50	9,696	5,394	180	145	125	5,462
Corn	569	267	213	14,474	17,949	81	208	103	18,068
Soybeans	1,030	1,154	89	20,702	24,141	86	124	148	24,684
<b>Total</b>	<b>1,654</b>	<b>1,532</b>	<b>108</b>	<b>44,872</b>	<b>47,484</b>	<b>94</b>	<b>142</b>	<b>130</b>	<b>48,215</b>
<b>Texas Gulf</b>									
Wheat	105	108	97	8,907	5,834	153	116	100	5,912
Corn	0	0	n/a	224	336	67	n/a	84	336
Soybeans	0	60	0	908	626	145	108	96	626
<b>Total</b>	<b>105</b>	<b>167</b>	<b>63</b>	<b>10,039</b>	<b>6,796</b>	<b>148</b>	<b>124</b>	<b>98</b>	<b>6,874</b>
<b>Interior</b>									
Wheat	38	11	343	1,051	1,206	87	117	109	1,218
Corn	160	102	157	3,834	6,087	63	118	144	6,115
Soybeans	81	70	116	3,160	4,168	76	278	95	4,204
<b>Total</b>	<b>279</b>	<b>183</b>	<b>153</b>	<b>8,045</b>	<b>11,461</b>	<b>70</b>	<b>91</b>	<b>121</b>	<b>11,538</b>
<b>Great Lakes</b>									
Wheat	21	66	31	884	481	184	369	137	481
Corn	0	0	n/a	0	56	0	n/a	0	56
Soybeans	23	54	43	674	687	98	168	171	713
<b>Total</b>	<b>44</b>	<b>120</b>	<b>37</b>	<b>1,558</b>	<b>1,224</b>	<b>127</b>	<b>214</b>	<b>149</b>	<b>1,250</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	645	341	189	n/a	0	341
Corn	3	6	53	237	143	165	203	62	143
Soybeans	118	120	99	1,573	1,412	111	116	162	1,460
<b>Total</b>	<b>121</b>	<b>125</b>	<b>97</b>	<b>2,455</b>	<b>1,896</b>	<b>129</b>	<b>117</b>	<b>147</b>	<b>1,944</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	522	479	109	32,541	25,828	126	118	102	26,040
Corn	906	620	146	21,572	30,026	72	278	117	30,230
Soybeans	1,474	1,687	87	35,847	41,056	87	124	136	42,035
<b>Total</b>	<b>2,902</b>	<b>2,786</b>	<b>104</b>	<b>89,960</b>	<b>96,910</b>	<b>93</b>	<b>147</b>	<b>123</b>	<b>98,305</b>

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

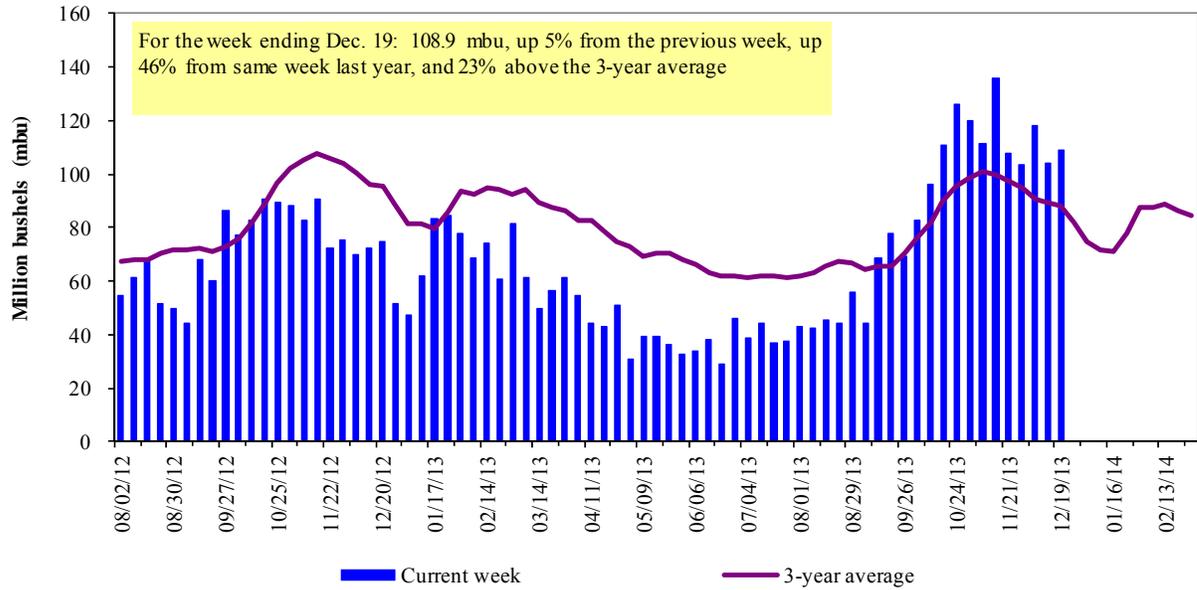
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

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)**

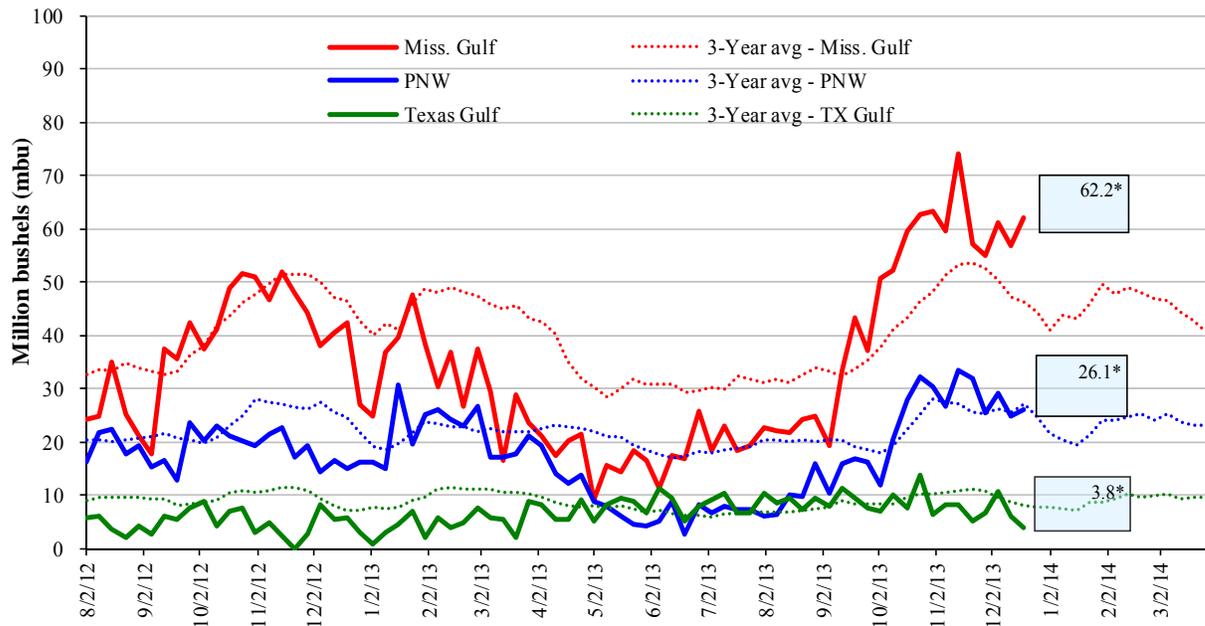


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

<b>Dec. 19: % change from:</b>	<b>MS Gulf</b>	<b>TX Gulf</b>	<b>U.S. Gulf</b>	<b>PNW</b>
Last week	up 9	down 37	up 5	up 5
Last year (same week)	up 47	down 31	up 38	up 74
3-yr avg. (4-wk mov. avg.)	up 37	down 45	up 26	up 7

# Ocean Transportation

Table 17

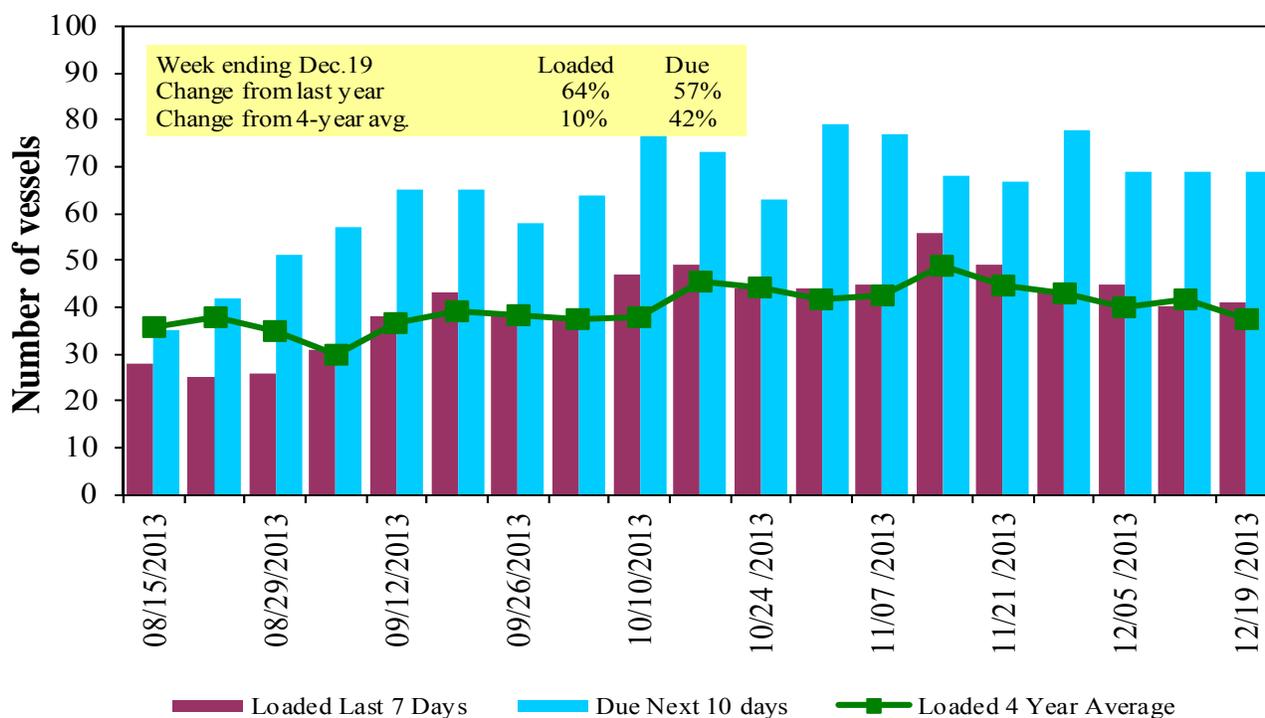
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
12/19/2013	56	41	69	24	n/a
12/12/2013	60	40	69	23	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**

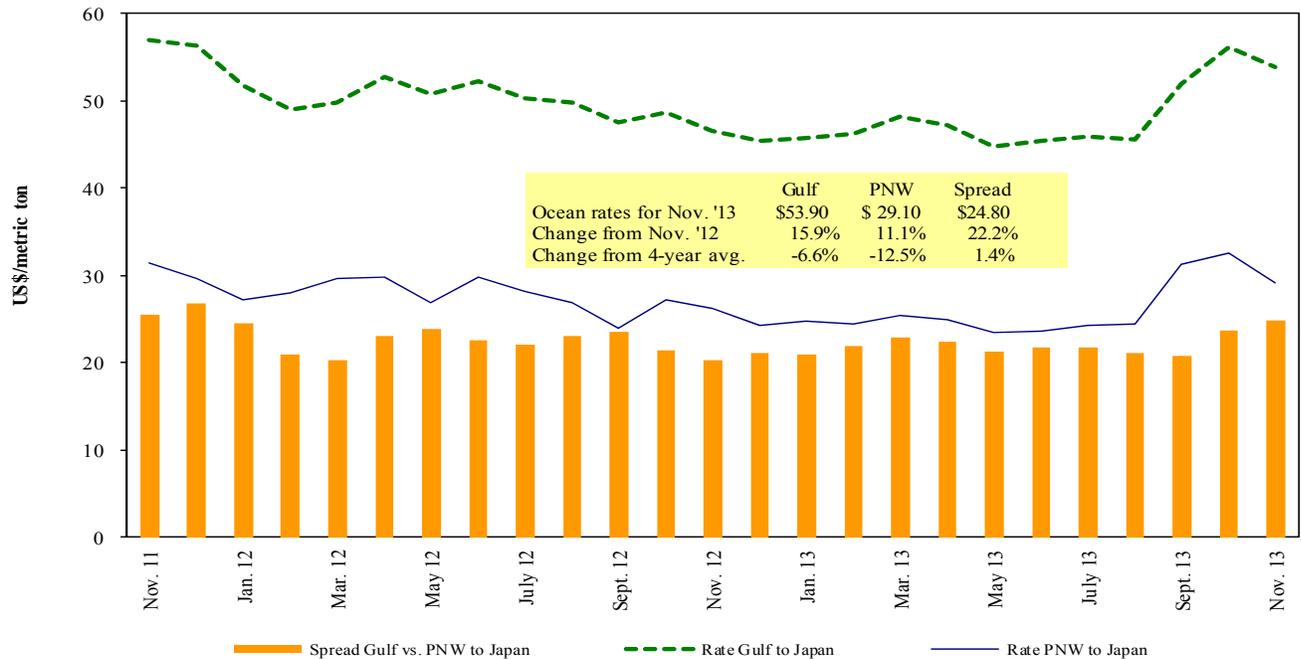


Source: Transportation & Marketing Programs/AMS/USDA

<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 12/21/2013**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 15/30	55,000	47.50
U.S. Gulf	China	Heavy Grain	31-Jan	58,000	56.50
U.S. Gulf	China	Heavy Grain	Dec 15/25	60,000	54.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	55,000	49.00
U.S. Gulf	China	Heavy Grain	Dec 1/10	60,000	51.00
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	45.00
U.S. Gulf	China	Heavy Grain	Nov 20/30	60,000	52.00
U.S. Gulf	China	Heavy Grain	Nov-Dec	55,000	49.50
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Dec 16/26	35,880	125.62
U.S. Gulf	S. Korea	Heavy Grain	Dec 5/20	58,000	54.00
U.S. Gulf	S. Korea	Heavy Grain	Nov 19/20	60,000	53.50
Atlantic	China	Heavy Grain	Nov 20/25	55,000	50.25
Brazil	Morocco	Corn	Sep 25/30	30,000	20.00
France	Algeria	Heavy Grain	Dec 10/20	25,000	27.50
France	Algeria	Wheat	Dec 1/5	25,000	26.00
Mexico	Algeria	Wheat	Nov 15/30	55,000	34.00
Ukraine	Italy	Corn	Oct 30/31	25,000	26.00
Ukraine	Sp Mediterranean	Grain	Dec 5/9	60,000	15.00

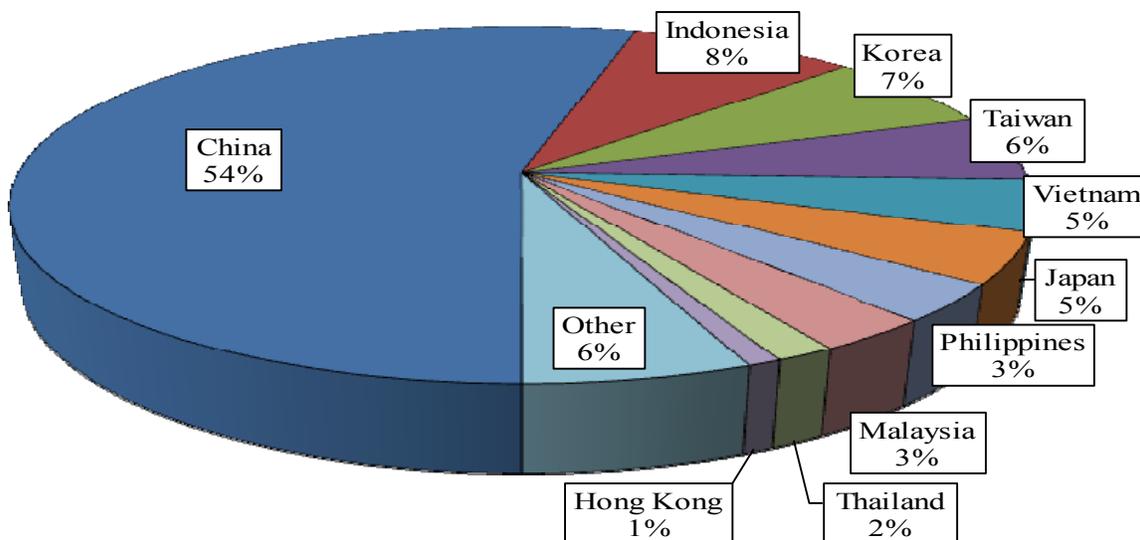
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

<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.

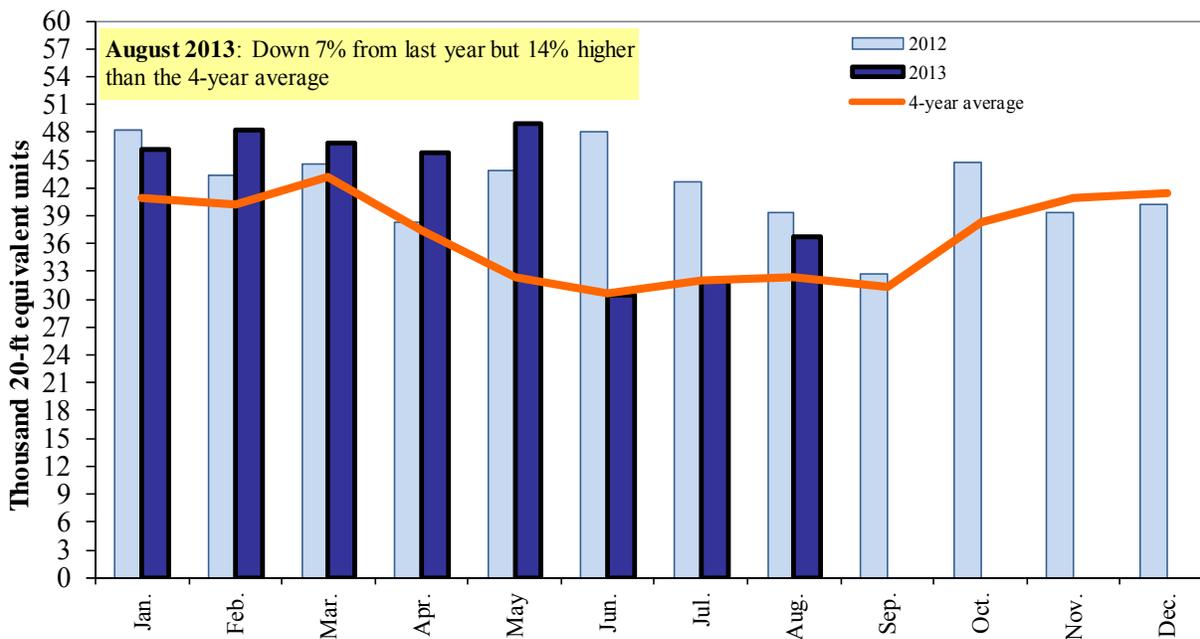
**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, August 2013**



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

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

**Figure 19**  
**Monthly Shipments of Containerized Grain to Asia**



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

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

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