



WEEKLY HIGHLIGHTS

December 29, 2011

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**Final Hours-of-Service Rule for Truckers: Agricultural Truckers Remain Exempt**

On December 22, the U.S. Department of Transportation's Federal Motor Carrier Safety Administration (FMCSA) issued the [final Hours-of-Service Rule](#), effective July 1, 2013, to limit the 34-hour restart provision to once every 168 hours. Drivers using the provision to establish a new work week must have, as part of the minimum 34-consecutive hours of off-duty time, two periods that include 1:00 a.m. to 5:00 a.m. During the work week, drivers may drive if they have had a break of at least 30 minutes, at a time of their choosing, sometime within the previous 8 hours. The current 11-hour daily driving limit is unchanged. The statutorily limited 100 air-mile radius agricultural exemption from the hours-of-service rule is not subject to or affected by this rulemaking.

**Winter Weather Continues to Shut Down Upper Mississippi River**

For the week ending December 24, only two Mississippi River locks – Melvin Price Locks and Dam (26) and Chain of Rock Locks (27) – reported significant grain traffic. Lock and Dam 25 had some minor traffic, while Locks and Dam 15 reported no traffic (see [Table 10](#)). Winter weather continues to slow barge traffic on the upper portions of the river. Upbound empty barges through Lock 27 were 27 percent lower than the previous week and down 42 percent over the past two weeks. Weather permitting, La Grange Lock and Dam on the Illinois River normally remains open all year. On the lower Mississippi River, river navigation is not typically affected by winter weather and does not need locks and dams because flows from the Missouri, Illinois, Arkansas, Ohio, and other rivers make it deep enough for navigation.

**Record Weekly PNW Corn Inspections for 2011**

During the week ending December 22, corn inspections, at 0.4 million metric tons (mmt), in the Pacific Northwest (PNW) were the highest since August 26, 2010. Exports of PNW corn were destined to three main buyers: China, Korea, and Japan. Inspections of corn and soybeans in the PNW increased 44 and 31 percent over last week, increasing total inspections for the PNW by 14 percent above last week and offsetting a 31 percent drop in PNW wheat inspections. For the week ending December 22, **total inspections of grain** for export reached 2.4 mmt, up 2 percent from the previous week but 9 percent below last year at this time.

**Ports of Los Angeles and Long Beach Reach Final Clean Truck Milestone**

January 1, marks the final milestone of the Ports of Los Angeles and Long Beach Clean Truck Program which banned “dirty” trucks from serving at the port. As of the beginning of the year, only trucks of model year 2007 or newer will be allowed on the port premises. Currently, nearly 11,000 drayage or short-haul trucks meet the ports’ strict emissions standards, representing more than 80 percent of the current fleet serving the ports. According to the Port of Long Beach, 98 percent of trucked container moves at the Port are done by trucks with 2007 or newer engines.

Snapshots by Sector

**Rail**

U.S. railroads originated 22,837 **carloads of grain** during the week ending December 17, up 3 percent from last week, down 7 percent from last year, and 1 percent higher than the 3-year average.

During the week ending December 22, average January non-shuttle **secondary railcar bids/offers per car** were \$12.50 above tariff, up \$33 from last week and \$18.50 higher than last year. Average shuttle rates were \$225 below tariff, down \$112 from last week and \$25 lower than last year.

**Barge**

During the week ending December 24, **barge grain movements** totaled 746,716 tons, 14 percent lower than the previous week and 13 percent lower than the same period last year.

During the week ending December 24, 463 grain barges **moved down river**, down 17 percent from last week; 690 grain barges were **unloaded in New Orleans**, up 5 percent from the previous week.

**Ocean**

During the week ending December 22, 39 **ocean-going grain vessels** were loaded in the Gulf, down 11 percent from this week last year. Forty-six vessels are expected to be loaded within the next 10 days, unchanged from the same period last year.

During the week ending December 23, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$57 per metric ton (mt), 1 percent less than the previous week. The cost of shipping from the Pacific Northwest to Japan was \$29 per mt, 3 percent less than the previous week.

**Fuel**

During the week ending December 26, U.S. average **diesel fuel prices** decreased 4 cents to \$3.79 per gallon—down 1 percent from the previous week but 15 percent higher than the same week last year.

## Feature Article/Calendar

To Our Readers:

The *Grain Transportation Report* (GTR) team sincerely thanks our readers and contributors for another great year! We recognize the GTR information we provide is important to you and we strive to make it insightful, timely, and reliable. Throughout the year, we aim to help our readers put into context the domestic and global market developments affecting agricultural transportation. Sometimes this is easier said than done because the U.S. agricultural commodity markets—and the transportation system that serves them—are highly competitive, fast paced, and ever evolving. We hope you enjoyed our reporting this past year and will continue to find the GTR useful in assisting with business planning and decision making in 2012.

In an effort to consistently improve our reporting, in September we offered an online inventory of GTR datasets. These historical datasets are available in Excel format for the convenience of our readers. Because grains are not only the cornerstone of the world's food supply but also of global agricultural commodity exchanges, we believe there is inherent value in being able to look at a decade's worth of grain transportation data. With this information, market analysts and researchers will hopefully be able to identify trends more easily, as well as make projections based on observable or emerging trends. If you haven't yet had a chance to see what is available, we urge you to look them over now by clicking on the following link. <http://www.ams.usda.gov/AMSV1.0/gtrdata>

We consider customer feedback a vital component for successfully providing the quality of services and information you expect. In early 2012, we will conduct a customer survey to evaluate how well the GTR is meeting your expectations, and to seek your ideas on ways it can be improved. We value your input and would appreciate you taking the time to give us information on how we can improve the quality of our services.

### **2011 Agricultural Transportation Overview**

Grain shippers have met their fair share of challenges in 2011, from a flooded river system to rising fuel prices and competing commodity prices. Reflecting on the year, several key events highlighted the intersection of agricultural markets, transportation, and government policies. Some of the top 2011 stories that illustrate this relationship included:

- Crop prices remained relatively high during the year, contributing to decreased exports during the last half of 2011 compared to 2010. By the end of the year, however, prices were mixed compared to same time last year. Nearby futures contracts prices as of 12/23 for wheat, \$6.22/bushel, were almost \$2.00 lower than at the end of last year; soybean prices, \$11.60/bushel, were almost \$1.50 lower; and, corn prices, \$6.20/bushel, were just 5 cents higher than at the end of last year.
- Russia re-entered the grain export markets on July 1, three months sooner than expected.
- Wheat exports experienced a strong year—19 percent higher than 2010. By contrast, corn exports decreased 9 percent and soybean exports decreased 19 percent.
- During 2011, most of the Mississippi River and its tributaries experienced high water that disrupted barge traffic. Barge traffic through the locking portions of the river system was 13 percent lower than last year. The number of barges unloaded in the New Orleans area was 10 percent lower than last year.
- Barge freight rates were above average for the first seven months of the year as high water conditions increased costs for barge operators. River levels eventually receded and eased navigation conditions that initiated a decline in rates.
- Diesel prices during 2011 averaged 28 percent higher than in 2010, affecting the costs of truck transportation and railroad fuel surcharges.

- Rail volumes of grain exceeded the three-year average during the first half of 2011, but were well below the 3-year average during the second half of 2011 due in part to decreased export sales and river transportation availability.
- Excess dry-bulk vessel capacity resulted in average 2011 Gulf to Japan ocean rates dropping 14.4 percent from 2010; PNW to Japan ocean rates dropping 15.7 percent in 2011.
- On August 10, the U.S. Department of Transportation reinforced its commitment to no new farm truck regulations for America's agricultural community.
- In 2011, EPA approved E-15 blends for vehicle models 2001 and newer, but industry storage and distribution constraints delayed widespread availability. If these infrastructure constraints are resolved in the future, E-15 is expected to increase transportation demand.
- Before adjourning for the year, Congress ended the 45-cent ethanol tax credit (VEETC) and the import tariff. While the impact is not fully known yet, most industry analysts do not believe the change will significantly affect the industry or transportation demand for ethanol and its co-products.

### **Things to Watch in 2012**

In December, 2011, USDA projected U.S. grain exports in 2011/12 to be much lower than last year. Signs of global economic recovery, however, may bode well for prospects of higher U.S. grain exports next marketing year, which may have implications for transportation demand during the second half of 2012.

Rail and barge grain transportation volumes during the first half of 2012 are expected to be lower than in 2011 due to decreased exports. The reduced rail grain volumes and railroad infrastructure investments are expected to result in adequate rail capacity. Rail rates are expected to increase despite reduced grain demand as the economic recovery in other sectors continues. Demand for corn from the ethanol industry is not expected to increase significantly because corn ethanol production is close to reaching the RFS cap of 15 billion gallons per year.

As we look forward to 2012, snowpack in much of the northern tier States is currently below average. However, La Nina may impact portions of the United States with heavy snowfall in late winter and early spring. If this occurs, it could produce heavy snowpack that may be capable of producing spring flooding issues in 2012 with the potential to affect barge traffic to New Orleans. This year, La Nina did not produce weather patterns for heavy snow and extreme cold in November and December, as it did in 2010.

Overcapacity in the global ocean vessel fleet could lead to volatile rates in 2012. Overcapacity in the bulk ocean market typically puts downward pressure on rates while overcapacity in the container fleet typically leads carriers to dry dock vessels and reduces service calls, putting upward pressure on rates.

### **Happy New Year**

We are thankful for our many blessings and look forward to providing you with uninterrupted weekly reports to help make informed marketing and transportation decisions. We appreciate and thank the many industry and Government representatives who regularly and voluntarily provided 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 <sup>2</sup>	Barge	Ocean	
				Gulf	Pacific
12/28/11	254	108	190	255	206
12/21/11	256	75	196	257	213

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

<sup>2</sup>The rail indicator is not an index. It is the difference between the nearby secondary rail market bid for this week and the average bid for year 2000 (+) 100. Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

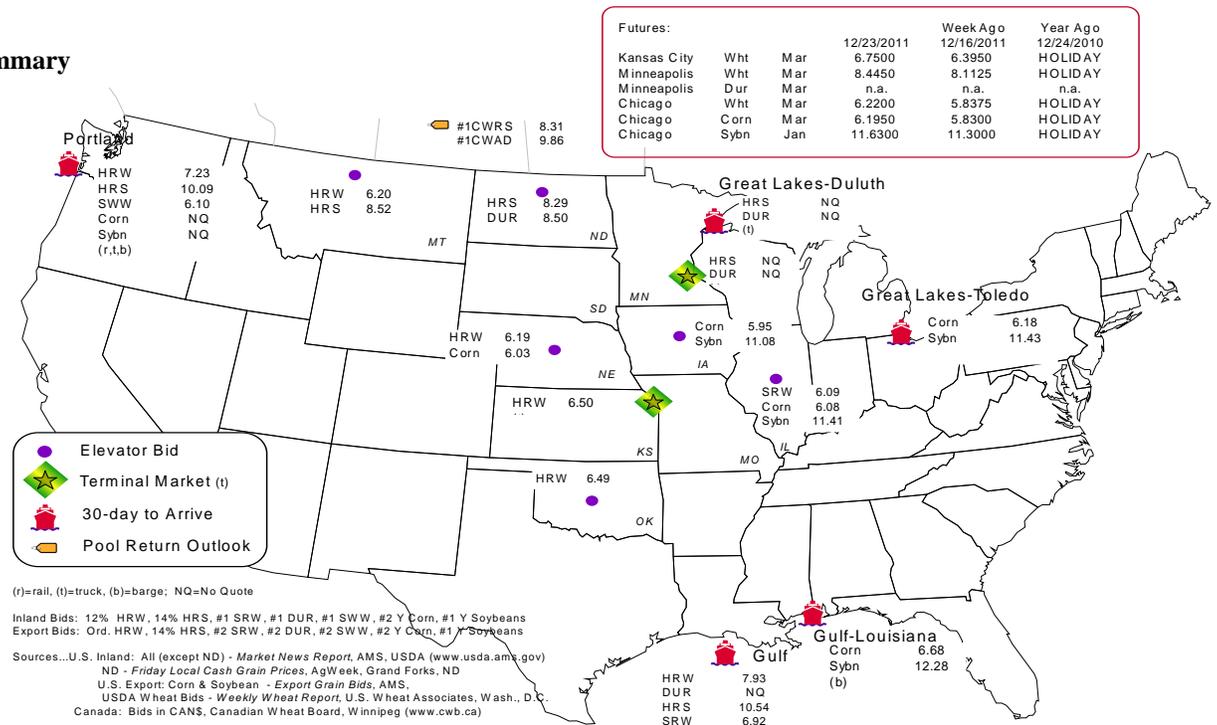
Commodity	Origin--Destination	12/23/2011	12/16/2011
Corn	IL--Gulf	-0.60	-0.55
Corn	NE--Gulf	-0.65	-0.63
Soybean	IA--Gulf	-1.20	-1.19
HRW	KS--Gulf	-1.43	-1.45
HRS	ND--Portland	-1.80	-1.90

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	
12/21/2011 <sup>p</sup>	56	570	708	3,840	499	5,673
12/14/2011 <sup>r</sup>	117	790	1,193	4,315	578	6,993
2011 YTD	27,354	77,111	47,795	176,235	23,636	352,131
2010 YTD	32,879	81,866	42,220	174,717	32,344	364,026
2011 YTD as % of 2010 YTD	83	94	113	101	73	97
Last 4 weeks as % of 2010 <sup>2</sup>	8	38	131	95	62	69
Last 4 weeks as % of 4-year avg. <sup>2</sup>	8	45	126	91	56	70
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100

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

<sup>2</sup> Compared with same 4-weeks in 2010 and prior 4-year average.

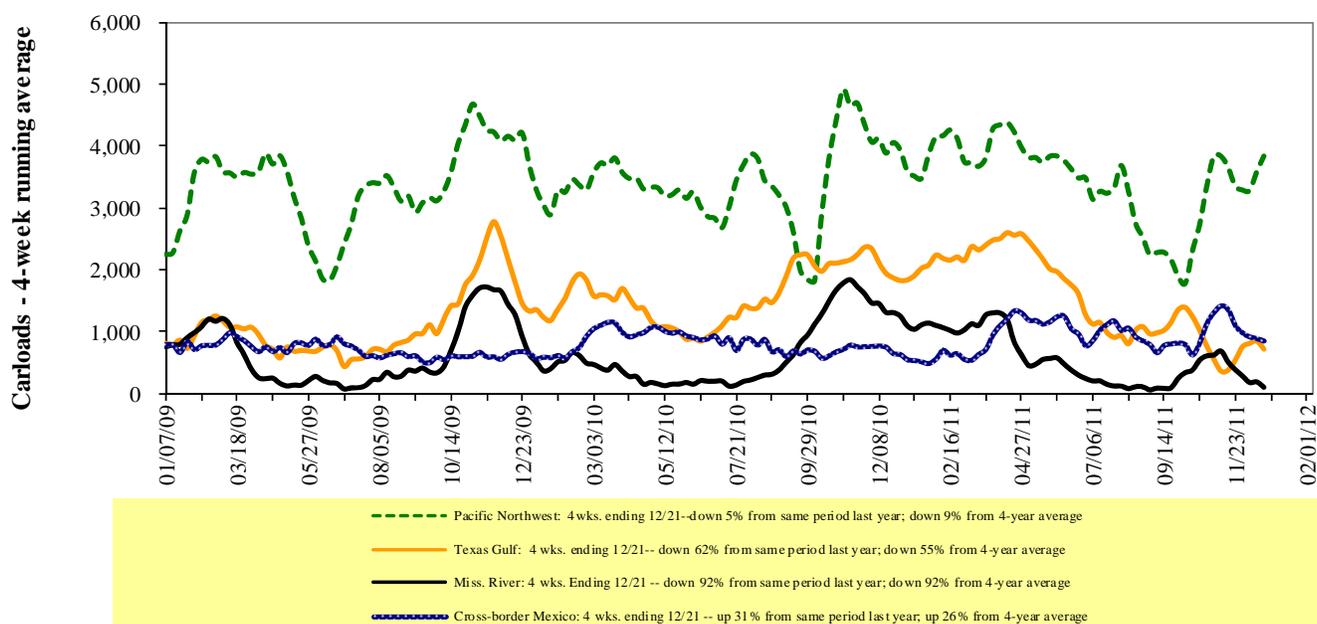
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 35 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

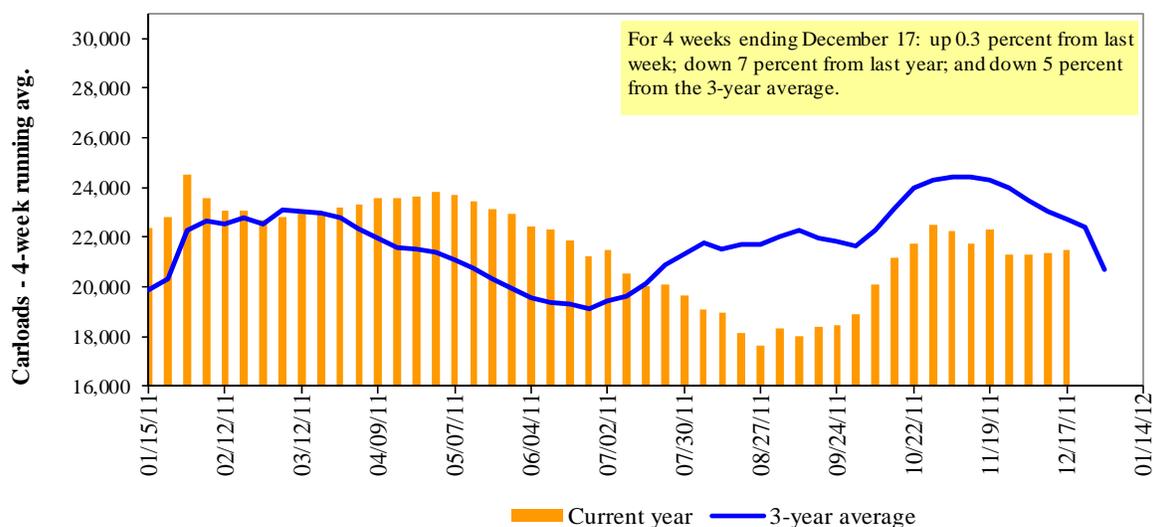
Table 4

**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
12/17/11	2,185	3,008	11,872	605	5,167	22,837	3,854	6,893
This week last year	1,685	3,094	12,506	675	6,515	24,475	4,274	4,683
2011 YTD	93,979	145,506	526,927	33,838	283,146	1,083,396	193,357	260,523
2010 YTD	107,343	154,098	528,636	34,937	284,724	1,109,738	196,699	258,149
2011 YTD as % of 2010 YTD	88	94	100	97	99	98	98	101
Last 4 weeks as % of 2010 <sup>1</sup>	103	87	99	57	84	93	96	115
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	102	88	102	53	89	95	98	103
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

<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-12	Jan-11	Feb-12	Feb-11	Mar-12	Mar-11	Apr-12	Apr-11
<b>12/22/2011</b>								
BNSF <sup>3</sup>								
COT grain units	0	no offer	no bids	no offer	no bids	4	no bids	no bids
COT grain single-car <sup>5</sup>	0 . . 10	no bids	10	no bids	no bids	no bids	no bids	no bids
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	1	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.

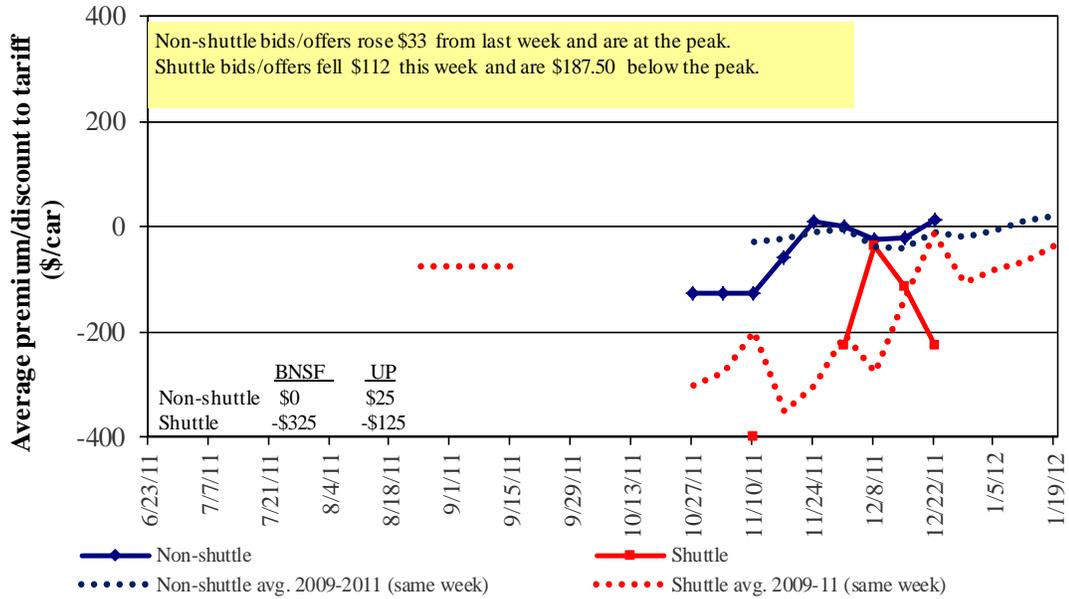
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 January 2012, Secondary Market**

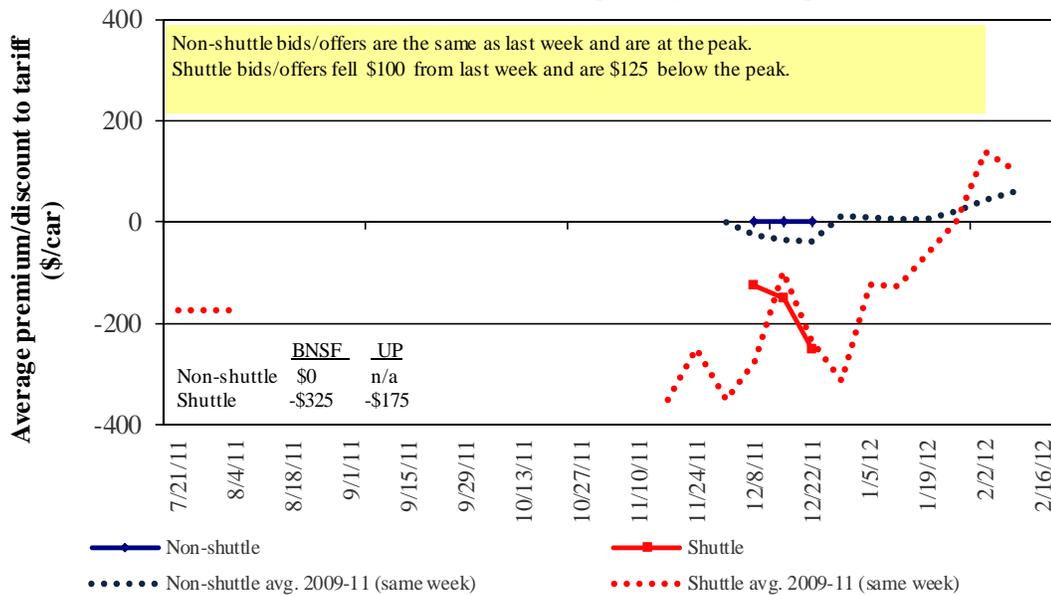


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

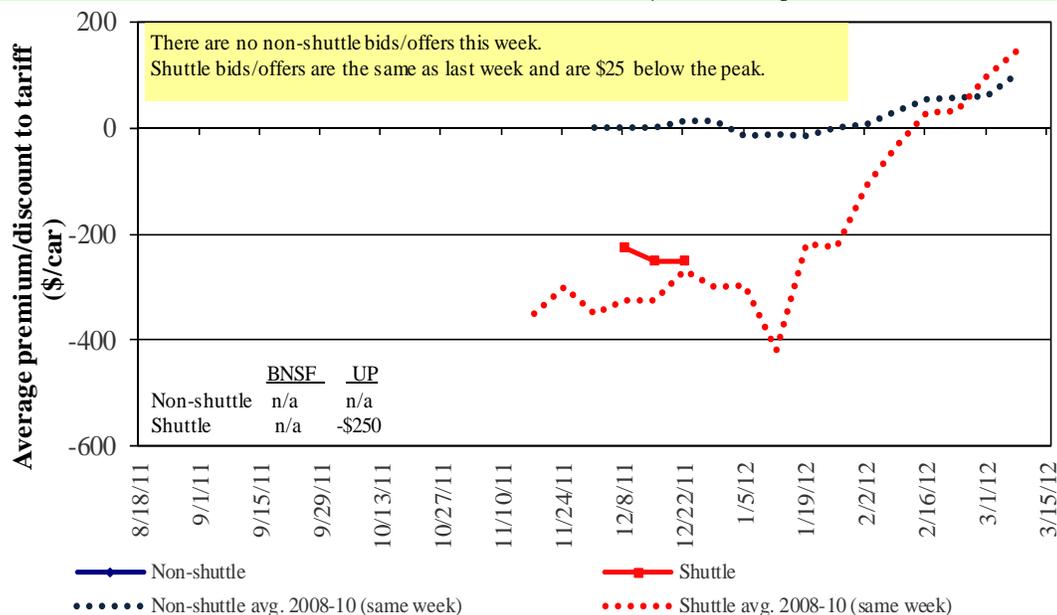


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

### Bids/Offers for Railcars to be Delivered in March 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					
	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12
<b>Non-shuttle</b>						
BNSF-GF	-	-	n/a	n/a	n/a	n/a
Change from last week	16	-	n/a	n/a	n/a	n/a
Change from same week 2010	(13)	38	n/a	n/a	n/a	n/a
UP-Pool	25	n/a	n/a	n/a	n/a	n/a
Change from last week	50	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	50	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(325)	(325)	n/a	n/a	n/a	n/a
Change from last week	(212)	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(125)	(175)	(250)	n/a	n/a	n/a
Change from last week	(12)	(25)	-	n/a	n/a	n/a
Change from same week 2010	75	58	138	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
12/5/2011	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	\$2,992	\$172	\$31.42	\$0.86	10
	Grand Forks, ND	Duluth-Superior, MN	\$3,097	\$98	\$31.73	\$0.86	18
	Wichita, KS	Los Angeles, CA	\$5,710	\$505	\$61.72	\$1.68	8
	Wichita, KS	New Orleans, LA	\$3,492	\$303	\$37.68	\$1.03	10
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$414	\$57.84	\$1.57	5
	Northwest KS	Galveston-Houston, TX	\$3,760	\$332	\$40.63	\$1.11	9
	Amarillo, TX	Los Angeles, CA	\$3,959	\$461	\$43.90	\$1.19	10
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,062	\$342	\$33.80	\$0.92	13
	Toledo, OH	Raleigh, NC	\$3,942	\$390	\$43.02	\$1.17	8
	Des Moines, IA	Davenport, IA	\$1,934	\$72	\$19.92	\$0.54	6
	Indianapolis, IN	Atlanta, GA	\$3,381	\$293	\$36.48	\$0.99	9
	Indianapolis, IN	Knoxville, TN	\$2,833	\$188	\$30.00	\$0.82	5
	Des Moines, IA	Little Rock, AR	\$3,074	\$213	\$32.64	\$0.89	7
Soybeans	Des Moines, IA	Los Angeles, CA	\$4,985	\$620	\$55.66	\$1.51	18
	Minneapolis, MN	New Orleans, LA	\$3,489	\$372	\$38.34	\$1.04	8
	Toledo, OH	Huntsville, AL	\$3,057	\$277	\$33.11	\$0.90	8
	Indianapolis, IN	Raleigh, NC	\$4,013	\$392	\$43.75	\$1.19	8
	Indianapolis, IN	Huntsville, AL	\$2,749	\$188	\$29.16	\$0.79	8
Champaign-Urbana, IL	New Orleans, LA	\$3,406	\$342	\$37.22	\$1.01	12	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$290	\$35.05	\$0.95	8
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$226	\$33.47	\$0.91	6
	Chicago, IL	Albany, NY	\$3,645	\$365	\$39.83	\$1.08	8
	Grand Forks, ND	Portland, OR	\$4,702	\$502	\$51.67	\$1.41	8
	Grand Forks, ND	Galveston-Houston, TX	\$5,745	\$522	\$62.24	\$1.69	9
	Northwest KS	Portland, OR	\$4,727	\$544	\$52.34	\$1.42	9
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$611	\$53.73	\$1.46	9
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$559	\$52.82	\$1.44	9
	Champaign-Urbana, IL	New Orleans, LA	\$2,877	\$342	\$31.97	\$0.87	12
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$326	\$36.11	\$0.98	9
	Des Moines, IA	Amarillo, TX	\$3,430	\$268	\$36.72	\$1.00	6
	Minneapolis, MN	Tacoma, WA	\$4,800	\$606	\$53.68	\$1.46	9
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$627	\$47.93	\$1.30	11
	Sioux Falls, SD	Tacoma, WA	\$5,040	\$559	\$55.60	\$1.51	10
	Minneapolis, MN	Portland, OR	\$5,030	\$611	\$56.02	\$1.52	10
	Fargo, ND	Tacoma, WA	\$4,930	\$497	\$53.90	\$1.47	9
	Council Bluffs, IA	New Orleans, LA	\$3,710	\$394	\$40.76	\$1.11	10
	Toledo, OH	Huntsville, AL	\$2,672	\$277	\$29.28	\$0.80	9
Grand Island, NE	Portland, OR	\$4,520	\$557	\$50.41	\$1.37	5	

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

90-110 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	\$531	\$84.52	\$2.30	11
	OK	Cuautitlan, EM	\$6,804	\$556	\$75.20	\$2.04	11
	KS	Guadalajara, JA	\$7,411	\$836	\$84.26	\$2.29	9
	TX	Salinas Victoria, NL	\$3,753	\$227	\$40.66	\$1.11	11
Corn	IA	Guadalajara, JA	\$7,699	\$843	\$87.28	\$2.21	9
	SD	Penjamo, GJ	\$7,776	\$694	\$86.55	\$2.20	13
	NE	Queretaro, QA	\$7,048	\$720	\$79.37	\$2.01	14
	SD	Salinas Victoria, NL	\$5,650	\$528	\$63.12	\$1.60	12
	MO	Tlalnepantla, EM	\$6,227	\$701	\$70.80	\$1.80	16
	SD	Torreon, CU	\$6,522	\$581	\$72.58	\$1.84	11
Soybeans	MO	Bojay (Tula), HG	\$6,986	\$738	\$78.92	\$2.15	13
	NE	Guadalajara, JA	\$7,904	\$843	\$89.37	\$2.43	14
	IA	El Castillo, JA <sup>5</sup>	\$8,255	\$690	\$91.40	\$2.48	13
	KS	Torreon, CU	\$6,396	\$574	\$71.22	\$1.94	14
Sorghum	OK	Cuautitlan, EM	\$5,885	\$527	\$65.52	\$1.66	17
	TX	Guadalajara, JA	\$6,653	\$452	\$72.59	\$1.84	13
	NE	Penjamo, GJ	\$7,446	\$789	\$84.14	\$2.14	12
	KS	Queretaro, QA	\$6,353	\$494	\$69.95	\$1.78	13
	NE	Salinas Victoria, NL	\$5,103	\$469	\$56.93	\$1.44	12
	NE	Torreon, CU	\$6,068	\$608	\$68.21	\$1.73	9

<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

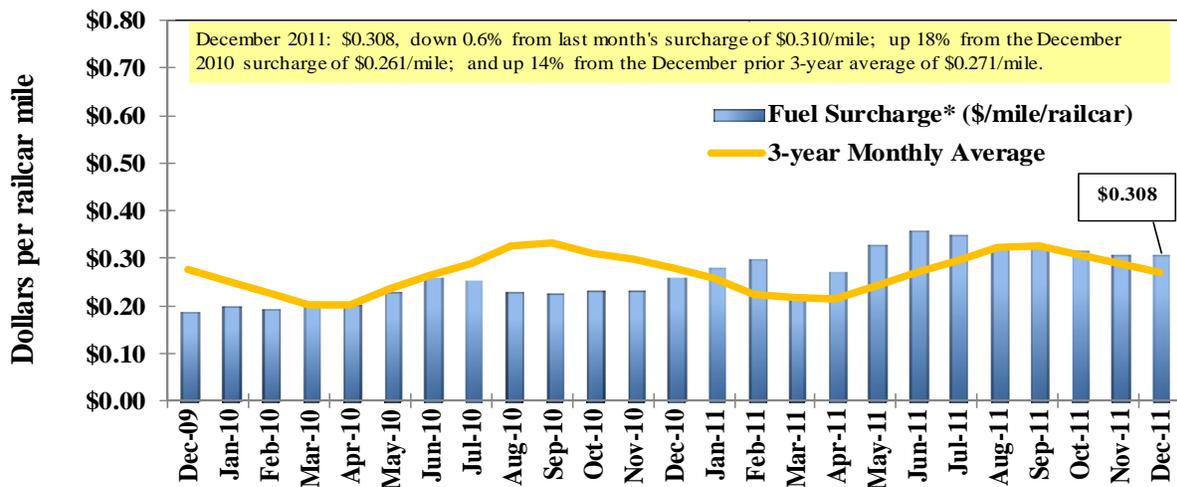
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

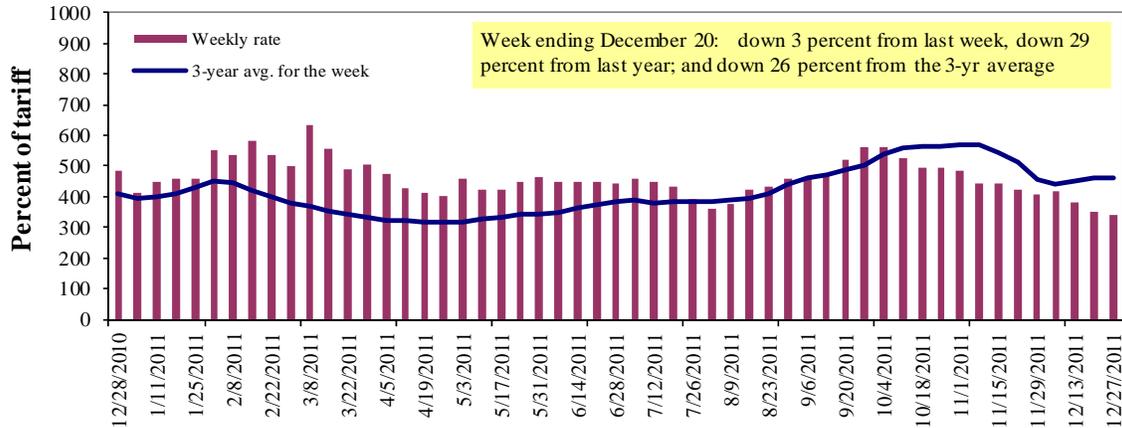
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

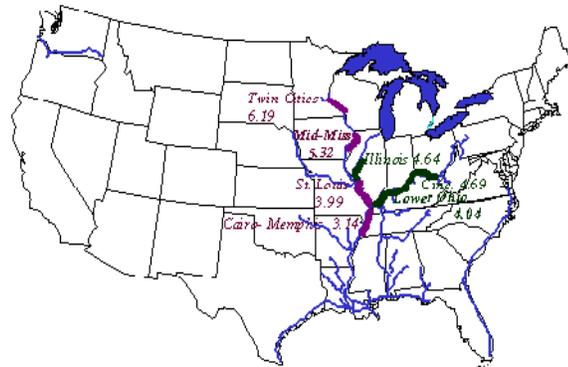
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	12/27/2011	--	--	342	242	330	330	230
	12/20/2011	--	--	353	260	335	335	238
<b>\$/ton</b>	12/27/2011	--	--	15.87	9.66	15.48	13.33	7.22
	12/20/2011	--	--	16.38	10.37	15.71	13.53	7.47
<b>Current week % change from the same week:</b>								
	Last year	--	--	-29	-29	-19	-19	-22
	3-year avg. <sup>2</sup>	--	--	-26	-33	-14	-14	-25
<b>Rate<sup>1</sup></b>	January	--	--	355	250	335	335	235
	March	--	400	350	245	325	325	233

<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

Figure 9  
Benchmark tariff rates



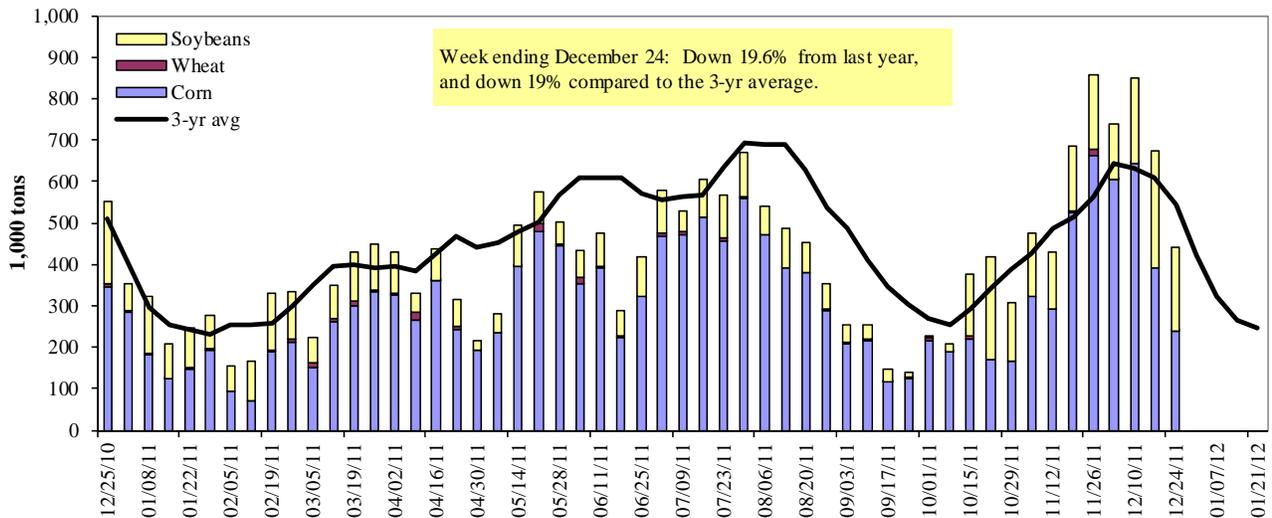
### Calculating barge rate per ton:

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

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 ([www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp))

Table 10

### Barge Grain Movements (1,000 tons)

Week ending 12/24/2011	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	46	2	33	0	81
Alton, IL (L26)	234	2	194	0	430
Granite City, IL (L27)	237	2	204	0	443
<b>Illinois River (L8)</b>	170	0	143	0	313
<b>Ohio River (L52)</b>	170	7	96	0	273
<b>Arkansas River (L1)</b>	0	21	8	1	31
Weekly total - 2011	407	30	308	1	747
Weekly total - 2010	432	30	389	9	860
2011 YTD <sup>1</sup>	19,688	1,438	8,356	422	29,904
2010 YTD	22,415	1,195	10,193	470	34,273
2011 as % of 2010 YTD	88	120	82	90	87
Last 4 weeks as % of 2010 <sup>2</sup>	139	99	70	100	103
Total 2010	22,768	1,220	10,373	481	34,841

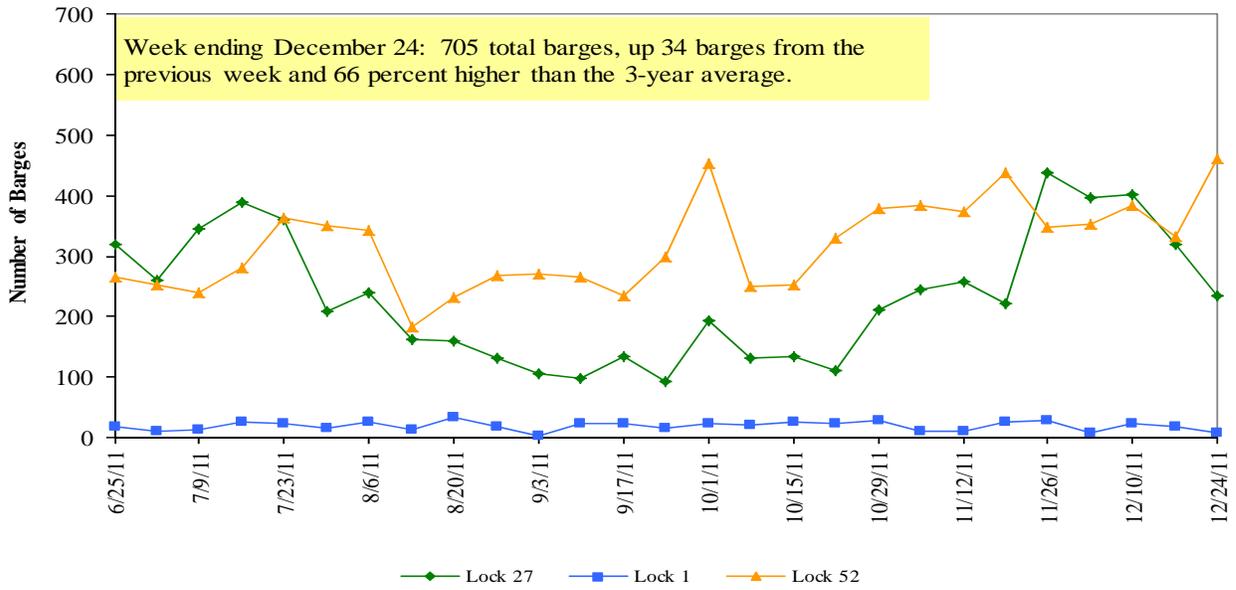
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

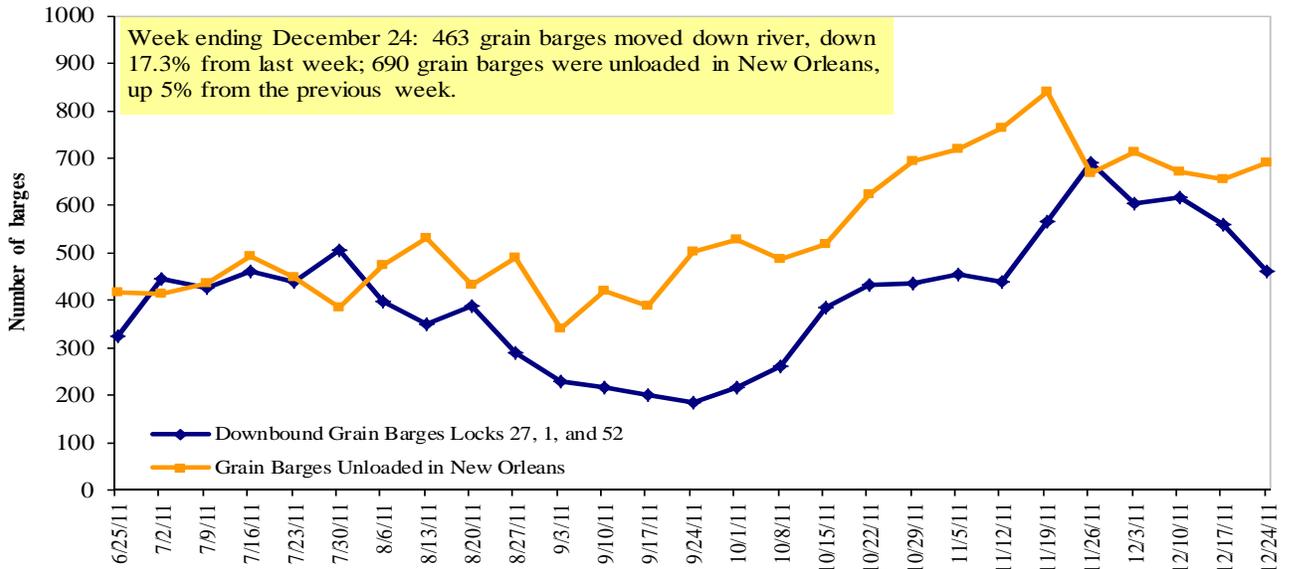
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webprts/default.asp))

**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 12/26/2011 (US \$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.840	-0.033	0.527
	New England	3.973	-0.022	0.567
	Central Atlantic	3.925	-0.038	0.497
	Lower Atlantic	3.752	-0.031	0.496
II	Midwest <sup>2</sup>	3.706	-0.059	0.428
III	Gulf Coast <sup>3</sup>	3.708	-0.019	0.482
IV	Rocky Mountain	3.861	-0.052	0.550
V	West Coast	3.978	-0.014	0.573
	California	4.039	-0.008	0.569
Total	U.S.	3.791	-0.037	0.497

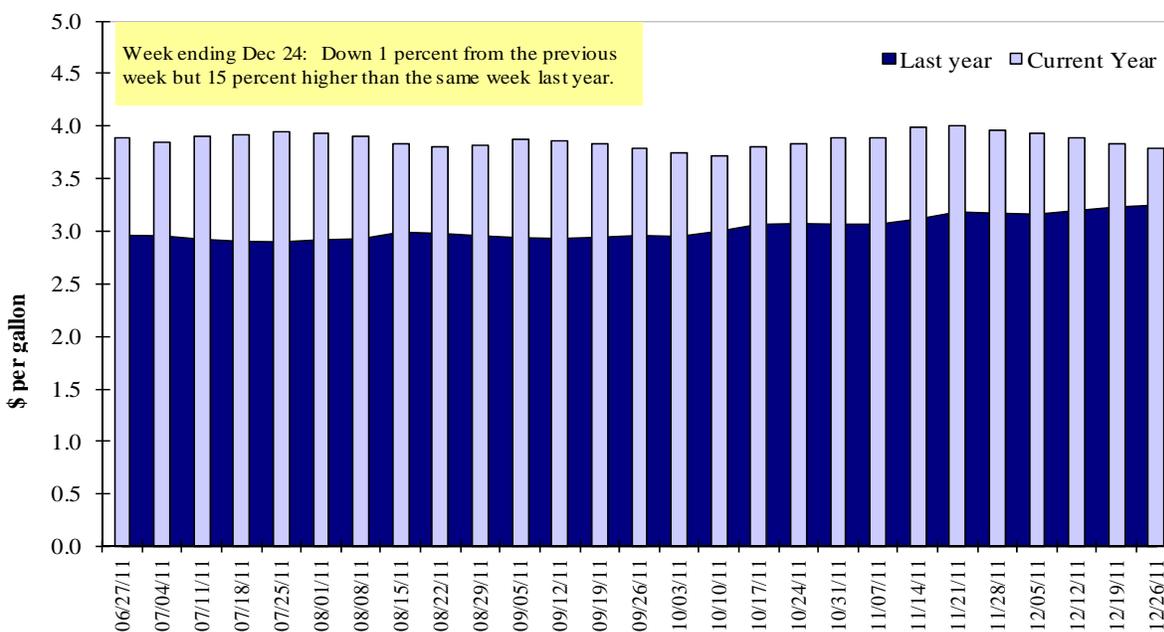
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
12/15/2011	1,339	709	1,188	1,071	50	4,358	11,804	10,184	26,347
This week year ago	4,040	832	2,612	1,287	102	8,873	12,443	14,873	36,189
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2011/12 YTD	5,874	1,920	3,839	2,715	323	14,671	12,249	12,991	39,911
2010/11 YTD	7,541	1,103	4,451	2,541	651	16,287	12,817	19,376	48,480
YTD 2011/12 as % of 2010/11	78	174	86	107	50	90	96	67	82
Last 4 wks as % of same period 2010/11	34	85	47	90	61	51	101	72	77
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385

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

<sup>2</sup> Shipped export sales to date; the new marketing year is now 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)

Table 13

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

Week ending 12/15/11	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	5,932	7,199	(18)	14,279
Mexico	5,370	3,841	40	7,019
Korea	2,407	3,271	(26)	6,104
Egypt	328	1,633	(80)	3,302
Taiwan	972	1,205	(19)	2,393
<b>Top 5 importers</b>	<b>15,008</b>	<b>17,148</b>	<b>(12)</b>	<b>33,096</b>
<b>Total US corn export sales</b>	<b>24,053</b>	<b>25,256</b>	<b>(5)</b>	<b>46,610</b>
% of Projected	59%	54%		
Change from Last Week	715	906		
<b>Top 5 importers' share of U.S. corn export sales</b>	62%	68%		
<b>USDA forecast, December 2011</b>	<b>40,640</b>	<b>46,600</b>	<b>(13)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol December 2011</b>	<b>127,000</b>	<b>127,534</b>	<b>(0.4)</b>	

(n) indicates negative number.

<sup>1</sup> Based on FAS 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.

<sup>3</sup> FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 14

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

Week Ending 12/15/2011	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	16,385	22,019	(26)	24,445
Mexico	1,362	1,521	(10)	3,215
Japan	60	1,181	(95)	1,887
EU-25	323	1,298	(75)	2,607
Indonesia	628	834	(25)	1,397
<b>Top 5 importers</b>	<b>18,759</b>	<b>26,853</b>	<b>(30)</b>	<b>33,551</b>
<b>Total US soybean export sales</b>	<b>23,176</b>	<b>34,249</b>	<b>(32)</b>	<b>40,690</b>
% of Projected	66%	84%		
Change from last week	653	764		
<b>Top 5 importers' share of U.S. soybean export sales</b>	81%	78%		
<b>USDA forecast, December 2011</b>	<b>35,380</b>	<b>40,860</b>	<b>(13)</b>	
<b>Soybean Use for Biodiesel USDA forecast, December 2011</b>	<b>8,632</b>	<b>5,995</b>	<b>44</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.<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 15

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

Week Ending 12/15/2011	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	2,205	2,219	(1)	3,233
Japan	2,454	2,586	(5)	3,148
Mexico	2,553	2,198	16	2,601
Philippines	1,657	1,722	(4)	1,518
Korea	1,083	1,263	(14)	1,111
Peru	551	700	(21)	923
Taiwan	620	604	3	913
Colombia	430	595	(28)	783
Indonesia	524	383	37	781
Yemen	272	414	(34)	659
<b>Top 10 importers</b>	<b>12,349</b>	<b>12,682</b>	<b>(3)</b>	<b>15,670</b>
<b>Total US wheat export sales</b>	<b>19,029</b>	<b>25,160</b>	<b>(24)</b>	<b>33,439</b>
% of Projected	76%	72%		
Change from last week	362	529		
<b>Top 10 importers' share of U.S. wheat export sales</b>	65%	50%		
<b>USDA forecast, December 2011</b>	<b>25,170</b>	<b>35,080</b>	<b>(28)</b>	

(n) indicates negative number.

<sup>1</sup>Modified from the FAS 2010/11 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.<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 12/22/11	Previous Week <sup>1</sup>	Current Week as % of Previous	2011 YTD <sup>1</sup>	2010 YTD <sup>1</sup>	2011 YTD as % of 2010 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2010
							2010	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	179	262	69	13,751	10,947	126	99	130	11,062
Corn	397	276	144	9,029	9,900	91	128	139	9,950
Soybeans	265	203	131	7,187	9,935	72	86	81	10,191
<b>Total</b>	<b>842</b>	<b>740</b>	<b>114</b>	<b>29,967</b>	<b>30,781</b>	<b>97</b>	<b>103</b>	<b>111</b>	<b>31,203</b>
<b>Mississippi Gulf</b>									
Wheat	49	21	238	4,952	4,161	119	37	64	4,199
Corn	417	641	65	25,905	29,349	88	104	129	29,794
Soybeans	617	413	149	18,603	22,180	84	63	65	22,519
<b>Total</b>	<b>1,083</b>	<b>1,074</b>	<b>101</b>	<b>49,460</b>	<b>55,690</b>	<b>89</b>	<b>76</b>	<b>87</b>	<b>56,512</b>
<b>Texas Gulf</b>									
Wheat	116	104	112	10,733	9,162	117	59	86	9,339
Corn	2	39	6	991	1,859	53	68	91	1,859
Soybeans	0	0	n/a	926	1,916	48	39	48	1,916
<b>Total</b>	<b>119</b>	<b>143</b>	<b>83</b>	<b>12,650</b>	<b>12,938</b>	<b>98</b>	<b>54</b>	<b>75</b>	<b>13,115</b>
<b>Interior</b>									
Wheat	22	24	91	1,106	914	121	77	106	926
Corn	177	153	116	7,397	6,312	117	70	152	6,388
Soybeans	65	73	89	4,185	3,591	117	114	127	3,641
<b>Total</b>	<b>264</b>	<b>250</b>	<b>106</b>	<b>12,689</b>	<b>10,817</b>	<b>117</b>	<b>91</b>	<b>139</b>	<b>10,954</b>
<b>Great Lakes</b>									
Wheat	0	35	0	1,038	1,897	55	37	64	1,897
Corn	0	11	0	178	119	149	56	43	119
Soybeans	25	59	42	361	655	55	71	119	655
<b>Total</b>	<b>25</b>	<b>104</b>	<b>24</b>	<b>1,577</b>	<b>2,672</b>	<b>59</b>	<b>52</b>	<b>83</b>	<b>2,672</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	699	341	205	149	139	343
Corn	0	0	n/a	268	469	57	18	16	469
Soybeans	71	46	155	972	1,363	71	75	65	1,417
<b>Total</b>	<b>71</b>	<b>46</b>	<b>155</b>	<b>1,939</b>	<b>2,173</b>	<b>89</b>	<b>77</b>	<b>68</b>	<b>2,229</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	367	445	82	32,278	27,422	118	70	101	27,765
Corn	994	1,120	89	43,769	48,009	91	114	132	48,580
Soybeans	1,042	793	131	32,234	39,640	81	70	72	40,340
<b>Total</b>	<b>2,403</b>	<b>2,357</b>	<b>102</b>	<b>108,281</b>	<b>115,071</b>	<b>94</b>	<b>84</b>	<b>96</b>	<b>116,684</b>

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

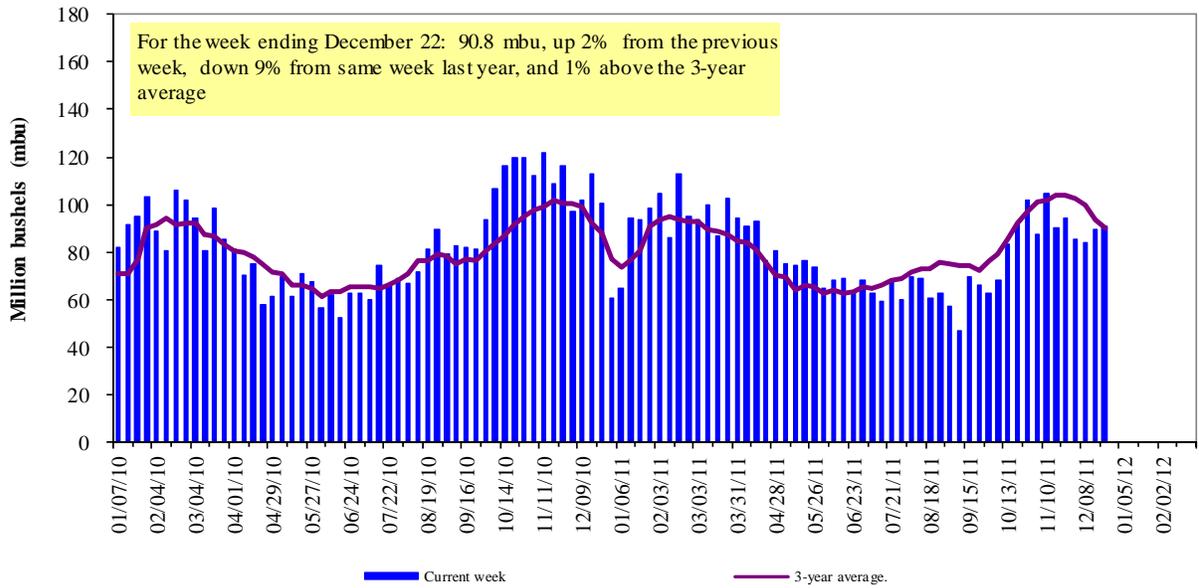
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

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 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

Figure 14

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

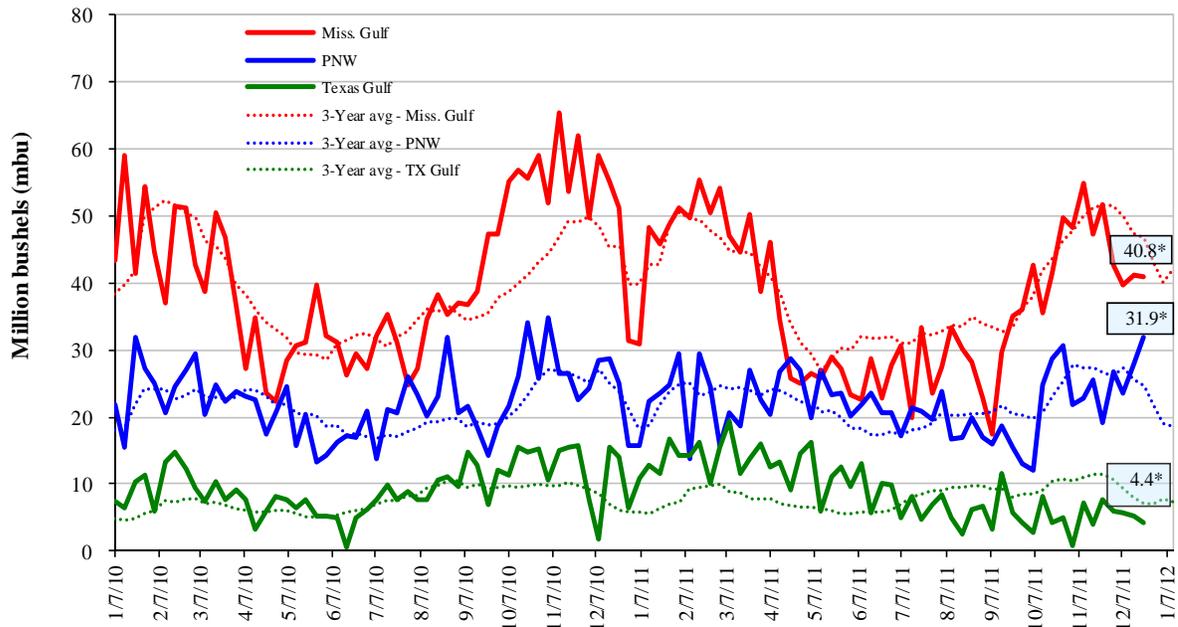


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

December 22 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 1	down 18	down 3	up 15
Last year (same week)	down 20	down 69	down 31	up 28
3-yr avg. (4-wk mov. avg.)	down 13	down 38	down 16	up 49

# Ocean Transportation

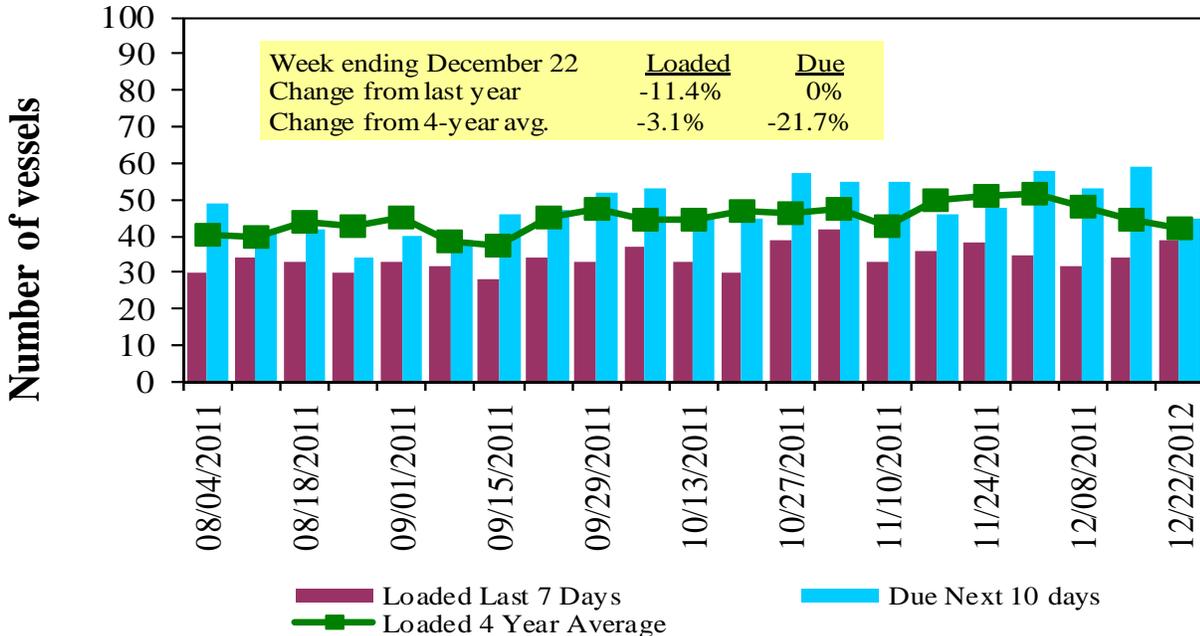
Table 17

**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
12/22/2011	22	39	46	10	5
12/15/2011	25	39	45	10	9
2010 range	(15..69)	(30..57)	(33..84)	(4..24)	(2..20)
2010 avg.	41	42	58	12	11

Source: Transportation & Marketing Programs/AMS/USDA

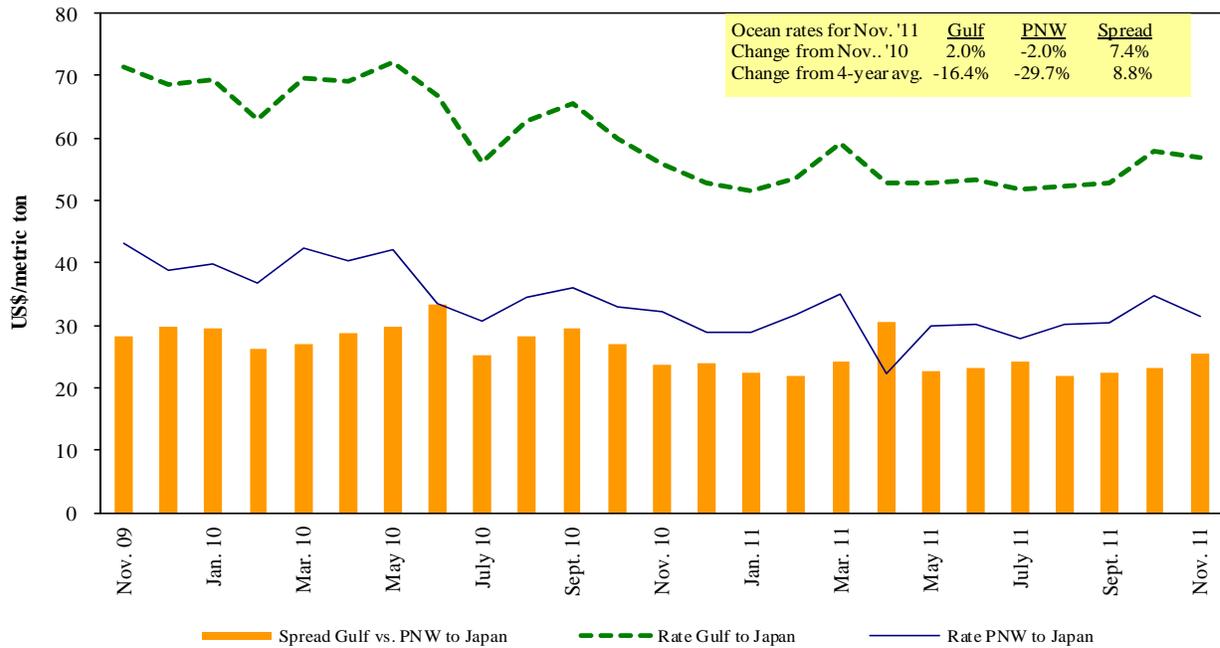
**Figure 16**  
**U.S. Gulf<sup>1</sup> Vessel Loading Activity**



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 12/24/2011**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 20/30	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 15/30	55,000	55.50
U.S. Gulf	China	Heavy Grain	Dec 10/20	55,000	56.00
U.S. Gulf	China	Heavy Grain	Dec 1/30	55,000	51.00
U.S. Gulf	China	Heavy Grain	Oct 21/30	55,000	52.50
U.S. Gulf	China	Heavy Grain	Oct 5/10	60,000	59.00
U.S. Gulf	Korea	Grain	Nov 25/Dec 5	55,000	57.00
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Dec 5/15	35,800	125.25
PNW	China	Grain	Jan 10/20	55,000	26.75
PNW	China	Heavy Grain	Dec 5/20	6,500	26.00
River Plate	Algeria	Maize	Oct 20/30	25,000	36.00
River Plate	Algeria	Maize	Oct 1/5	25,000	34.50
Russia	Yemen	Grain	Dec 1/3	35,000	42.00

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

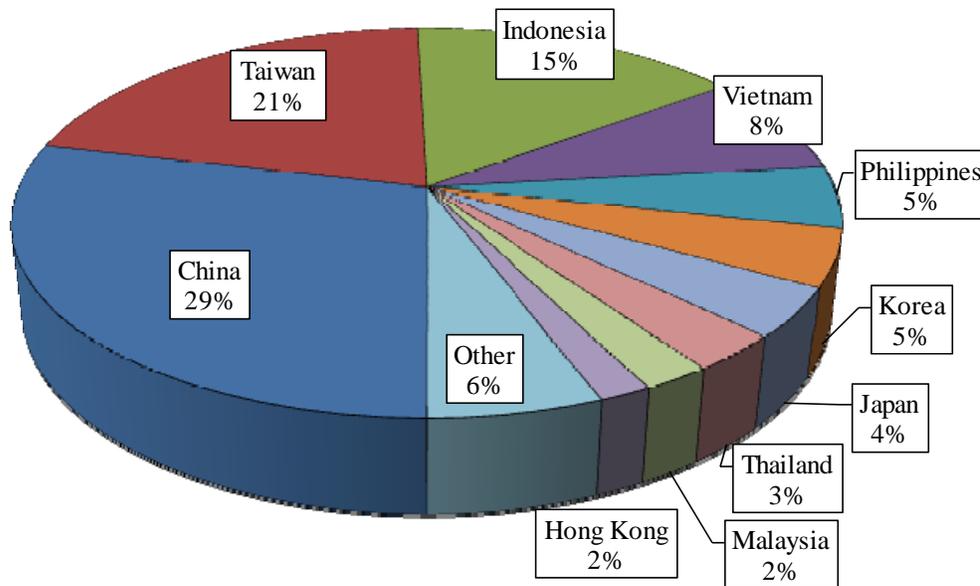
<sup>1</sup> 75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2010, containers were used to transport 5 percent of total U.S. waterborne grain exports, and 7 percent of U.S. grain exports to Asia. Asia is the top destination for U.S. containerized grain exports—94 percent in 2010.

Figure 18

**Top 10 Destination Markets for U.S. Containerized Grain Exports, September 2011**

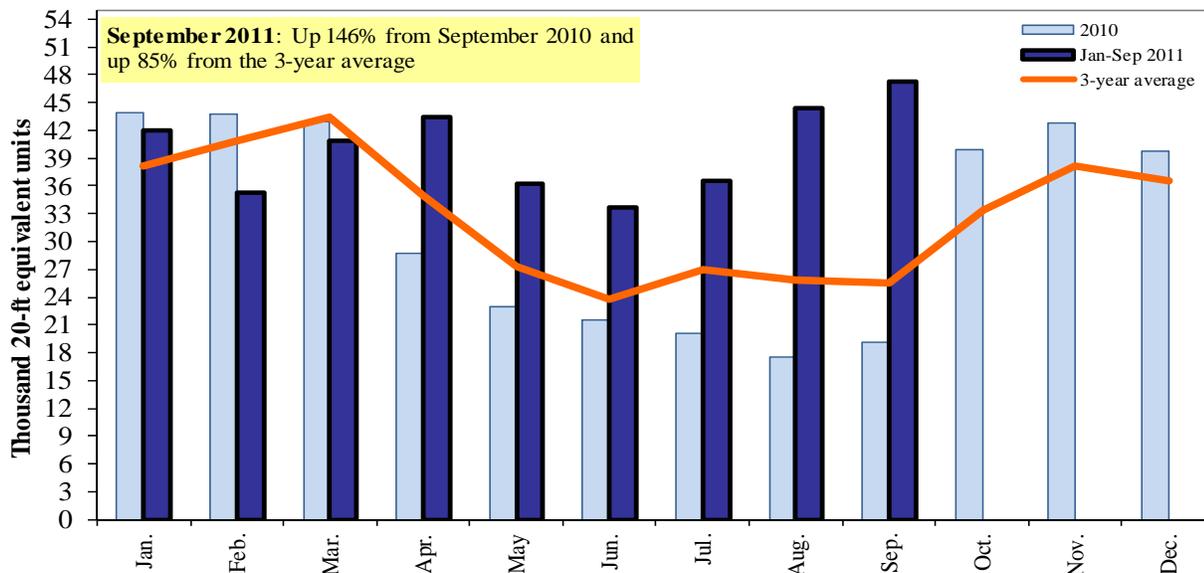


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 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 (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

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