USDA Agricultural Marketing Service

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## Contents



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The next release is Jan. 26, 2012

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## WEEKLY HIGHLIGHTS

### Gulf Grain Vessel Loading Activity Likely to Pick Up

Grain vessel loading activity in the U.S. Gulf is likely to increase in the near term. During the week ending January 12, 66 **ocean-going grain vessels** were expected to be loaded during the next 10 days—25 percent higher than the average (53 vessels) for the past eight weeks. The last time this many vessels were expected was March 3, 2011, when 76 vessels were expected to be loaded. Ocean freight rates for shipping bulk grain have remained relatively low. As of January 13, the ocean freight rate for shipping bulk grain from the Gulf to Japan was $51.00 per metric ton (mt), 8 percent less than the previous week. The cost of shipping from the Pacific Northwest to Japan was $27 per mt, 7 percent less than the previous week. Ocean rates are likely to remain low through the Chinese New Year holiday season, which is traditionally a slow period for dry bulk shipments.

### Labor Walkout Stalls Panama Canal Expansion

Construction on the Panama Canal's third set of locks stopped Monday when workers discontinued work to demand payment of back wages, an increase in minimum wages, and better working conditions. The expansion work, which is expected to double the canal's capacity by late 2014, has been slowed by labor disputes in the past. The canal is a vital outlet for U.S. grain shipments to Asia. Close to 31 million metric tons of U.S. grain exported to Asia transited the canal during fiscal year 2010.

### Soybean and Wheat Inspections Rebound

For the week ending January 12, **total inspections of soybeans and wheat** for export reached 1.12 and .366 million metric tons (mmt), pushing total inspections of grain (corn, wheat, soybeans) to 2.25 mmt, up 11 percent from the past week but 11 percent below last year at this time. Total wheat inspections increased 25 percent from the previous week as shipments to Asia from the Pacific Northwest (PNW) jumped 57 percent. Total soybean inspections increased 28 percent as shipments to China rebounded. Total inspections of grain in the PNW increased 35 percent from the previous week, while inspections in the Mississippi Gulf increased 8 percent. Corn inspections, however, decreased 11 percent from the previous week to .765 mmt.

### St Louis River Levels Dropping; Slight Increase in Rates

River levels at St. Louis, MO, have been dropping since December 23, 2011. As of today at 8am CST, the St. Louis Gage was at 1.6 gage feet. Last January, the monthly average gage for St. Louis was 6.4 feet. However, notwithstanding the lower river levels, traffic continues through St. Louis with 293 **empty barges traveling upbound** through Mississippi River Locks 27 during the week ending January 14. Empty barges are probably being delivered to points on the Illinois River, which is open all year when weather permits. So far, the low water conditions have not hampered barge operations, but barge rates have increased by 14 percent since late December. In addition, traffic is slowed at Locks 27 by the closure of the large main chamber, which is being repaired. The chamber will reopen on March 15. Traffic is currently using the smaller auxiliary lock chamber.

## Snapshots by Sector

### Rail

U.S. railroads originated 20,853 **carloads of grain** during the week ending January 7, up 18 percent from last week, down 20 percent from last year, and 3 percent higher than the 3-year average.

During the week ending January 12, average January non-shuttle **secondary railcar bids/offers per car** were $31.50 below tariff, down $37.50 from last week and down $144 from last year. Average shuttle rates were $319 below tariff, down $50 from last week and $294 from last year.

### Barge

During the week ending January 14, **barge grain movements** totaled 598,588 tons, 17.7 percent higher than the previous week and 11 percent higher than the same period last year.

During the week ending January 14, 372 grain barges **moved down river**, up 18.5 percent from last week; 840 grain barges were **unloaded in New Orleans**, up 23.3 percent from the previous week.

### Ocean

During the week ending January 12, 37 **ocean-going grain vessels** were loaded in the Gulf, down 26 percent from the same week last year.

### Fuel

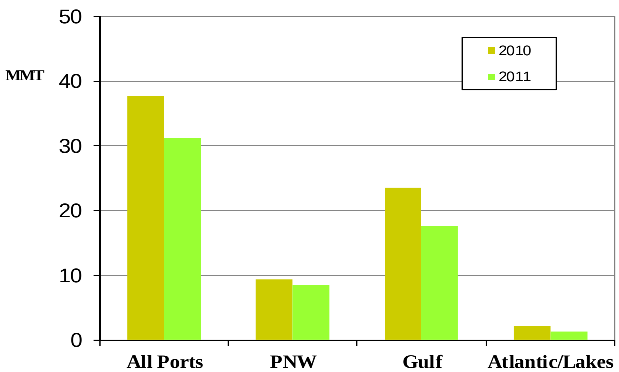
During the week ending January 16, U.S. average **diesel fuel prices** increased 3 cents to $3.85 per gallon—up 0.7 percent from the previous week and 13 percent higher than the same week last year.

# Feature Article/Calendar

## Fourth Quarter Grain Inspections Lowest Since 2008

The amount of grain (wheat, corn, soybeans) inspected for export at major U.S. ports by the Grain Inspection, Packers, and Stockyards Administration (GIPSA) during the fourth quarter totaled 31.28 million metric tons (mmt)(figure 1), 17 percent below the fourth quarter of 2010 and 6 percent below the 5-year average. Inspections decreased because of reduced soybean and wheat crops, and increased competition from other top grain-producing countries. U.S. shipments of soybeans to China dropped as exports from South America increased. Although U.S. corn production decreased from the previous year, inspections increased notably as shipments to Mexico and Asia rebounded.

**Figure 1 - Fourth Quarter Grain Inspections, by Port Region**




Source: USDA/GIPSA

U.S. Gulf grain inspections decreased 25 percent from last year due to decreased demand, resulting from higher prices and increased worldwide competition. Barge movements on the Mississippi River, down 4 percent from last year, did not increase as expected during harvest. Low stocks at the beginning of harvest provided farmers with expanded storage capacity and less pressure to sell (***GTR dated 11/17/11***). Total rail deliveries of grain during the fourth quarter to all major export regions dropped 20 percent from last year. Rail deliveries of grain to the U.S. Gulf decreased 56 percent from the same period last year due to the drop in demand.

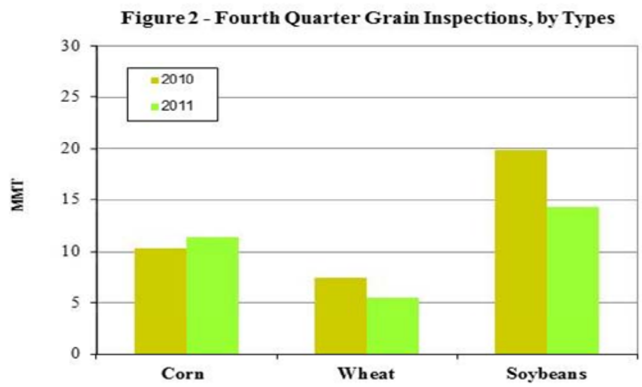
Fourth quarter Pacific Northwest (PNW) grain inspections reached 8.56 mmt, down 8 percent from last year but 2 percent above the 5-year average. The decrease was due mainly to a 32-percent drop in soybean inspections, resulting from tight U.S. stocks and less demand from China. Rail deliveries to the Pacific Northwest decreased 12 percent from last year. Atlantic/Lakes grain inspections (1.30 mmt) decreased 41 percent from last year and were 37 percent below the 5-year average.

Although the fourth quarter ocean rate spread between the Pacific Northwest (PNW) and U.S. Gulf was higher than the third quarter 2011 and the fourth quarter last year, PNW shipments did not increase as they normally do with a higher spread because overall ocean rates are too low to affect shipping patterns. An increased spread normally gives PNW shipping a competitive edge over the U.S. Gulf. Although fourth quarter ocean rates for shipping grain increased 2 percent for shipping from the U.S. Gulf and PNW to Japan, they are historically low due to a slowdown in shipping and excess vessel supply.

**Corn Inspections Highest Since 2007**

Inspections of corn reached 11.41 mmt during the fourth quarter, up 11 percent from last year (figure 2); the largest since 2007 (16.43 mmt). PNW corn inspections (2.28 mmt) increased 47 percent as Asian demand increased. U.S. Gulf corn inspections (6.88 mmt) decreased 7 percent as shipments to Asia and Central America declined. Unshipped export sales of corn averaged 13.79 mmt, up 10 percent from last year. Higher U.S. corn prices through early 2012 could limit U.S. corn exports during 2012.

Fourth quarter soybean inspections reached 14.34 mmt, 28 percent below last year and 4 percent below the 5-year average. The decrease was driven by reduced demand from China and higher U.S. soybean prices. U.S. soybean shipments to China dropped 48 percent from last year during the fourth quarter. Soybean inspections decreased 31 percent in the U.S. Gulf to 8.50 mmt. PNW soybean inspections were 32 percent below last year and 11 percent below the 5-year average. Outstanding (unshipped) export sales of soybeans averaged 12.20 mmt during the fourth quarter, down 32 percent from last year (17.97 mmt) this time.




Fourth quarter wheat inspections decreased 26 percent from last year, to 5.52 mmt mainly because of a smaller crop and higher world supplies due to the end of the Russian export ban on grain (figure 2). Unshipped export sales of wheat were 47 percent below last year, averaging only 4.40 mmt. Gulf wheat inspections (2.29 mmt) decreased 42 percent from the previous year because of reduced shipments to Africa and Latin America. PNW wheat inspections (2.76 mmt) increased 8 percent from last year during the fourth quarter. The Atlantic/Great Lakes wheat inspections (.244 mmt) were the lowest on record.
*Johnny.Hill@ams.usda.gov*

# Grain Transportation Indicators

Table 1

**Grain Transport Cost Indicators[1]**

| Week ending | Truck | Rail[2] | Barge | Ocean Gulf | Ocean Pacific |
|---|---|---|---|---|---|
| 01/18/12 | 259 | 83 | 201 | 228 | 191 |
| 01/11/12 | 257 | 101 | 202 | 250 | 206 |

[1]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)

[2]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 | 1/13/2012 | 1/6/2012 |
|---|---|---|---|
| Corn | IL--Gulf | -0.68 | -0.64 |
| Corn | NE--Gulf | -0.83 | -0.79 |
| Soybean | IA--Gulf | -1.29 | -1.22 |
| HRW | KS--Gulf | -1.45 | -1.45 |
| HRS | ND--Portland | -1.87 | -1.99 |

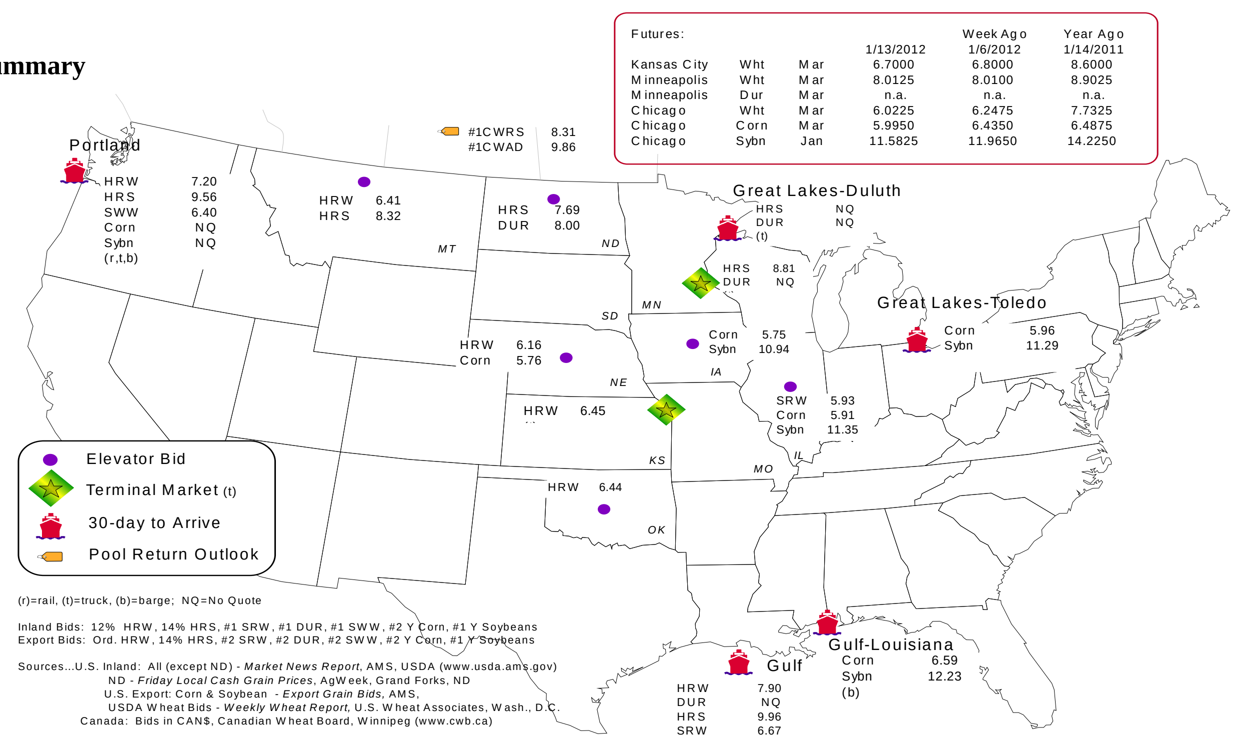
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1

**Grain bid Summary**



# Rail Transportation

Table 3

**Rail Deliveries to Port (carloads)[1]**

| Week ending | Mississippi Gulf | Texas Gulf | Cross-Border Mexico | Pacific Northwest | Atlantic & East Gulf | Total |
|---|---|---|---|---|---|---|
| 1/11/2012[p] | 148 | 454 | 915 | 3,013 | 387 | 4,917 |
| 1/04/2011[r] | 25 | 995 | 793 | 3,177 | 348 | 5,338 |
| 2012 YTD | 173 | 1,449 | 1,708 | 6,190 | 735 | 10,255 |
| 2011 YTD | 768 | 3,869 | 918 | 6,996 | 1,602 | 15,338 |
| 2012 YTD as % of 2011 YTD | 23 | 37 | 186 | 88 | 46 | 67 |
| Last 4 weeks as % of 2011[2] | 6 | 30 | 156 | 91 | 56 | 66 |
| Last 4 weeks as % of 4-year avg.[2] | 7 | 37 | 140 | 94 | 52 | 71 |
| Total 2011 | 27,358 | 77,515 | 48,782 | 178,990 | 24,088 | 356,733 |
| Total 2010 | 33,971 | 83,492 | 42,794 | 177,896 | 32,780 | 370,933 |

[1] Data is incomplete as it is voluntarily provided

[2] Compared with same 4-weeks in 2011 and prior 4-year average.

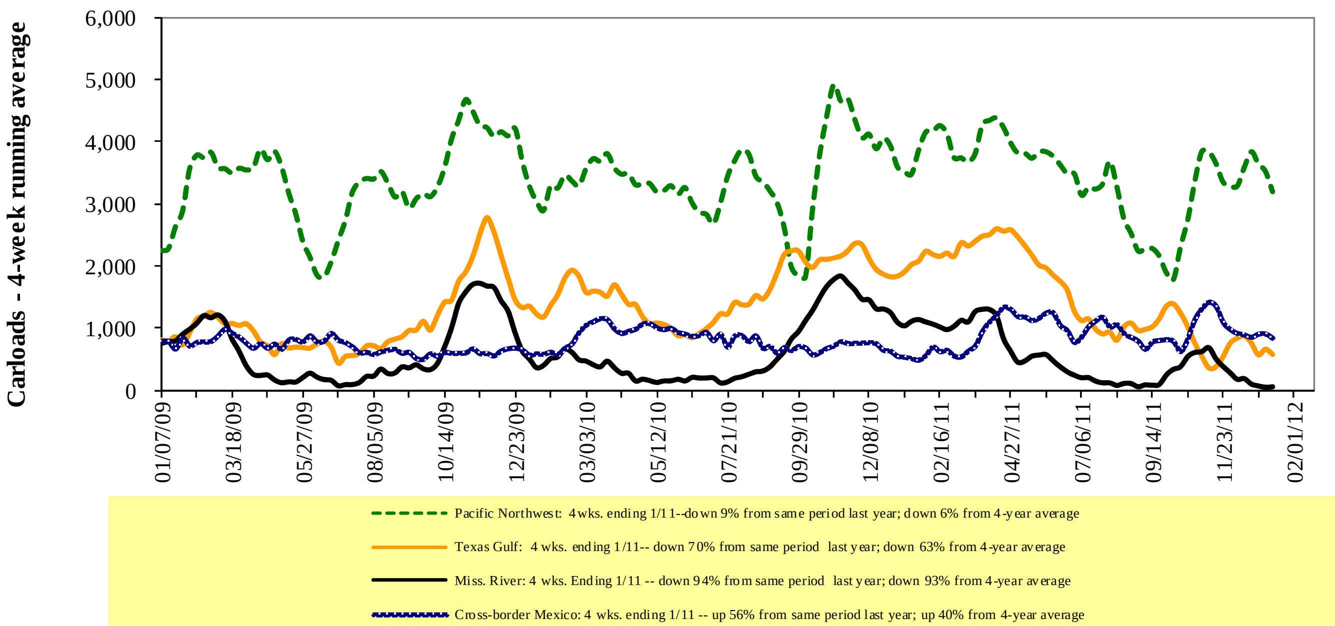
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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)

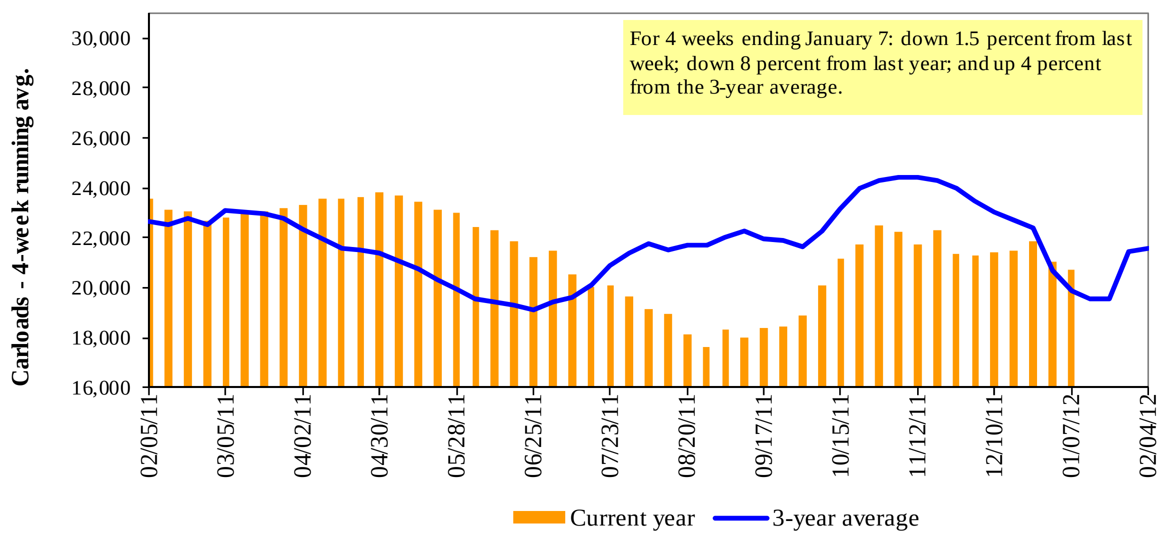
| Week ending | East | | West | | | U.S. total | Canada | |
|---|---|---|---|---|---|---|---|---|
| | CSXT | NS | BNSF | KCS | UP | | CN | CP |
| 01/07/12 | 2,222 | 3,110 | 10,235 | 426 | 4,860 | 20,853 | 3,560 | 4,561 |
| This week last year | 2,648 | 3,409 | 11,941 | 684 | 7,231 | 25,913 | 3,605 | 5,317 |
| 2012 YTD | 2,222 | 3,110 | 10,235 | 426 | 4,860 | 20,853 | 3,560 | 4,561 |
| 2011 YTD | 2,648 | 3,409 | 11,941 | 684 | 7,231 | 25,913 | 3,605 | 5,317 |
| 2012 YTD as % of 2011 YTD | 84 | 91 | 86 | 62 | 67 | 80 | 99 | 86 |
| Last 4 weeks as % of 2011[1] | 100 | 95 | 97 | 84 | 79 | 92 | 103 | 114 |
| Last 4 weeks as % of 3-yr avg.[1] | 107 | 105 | 113 | 79 | 95 | 106 | 110 | 122 |
| Total 2011 | 98,506 | 150,869 | 546,090 | 34,683 | 292,401 | 1,122,549 | 200,610 | 269,399 |

[1]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[1] ($/car)[2]

| Week ending 1/12/2012 | Delivery period | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Jan-12 | Jan-11 | Feb-12 | Feb-11 | Mar-12 | Mar-11 | Apr-12 | Apr-11 |
| BNSF[3] | | | | | | | | |
| COT grain units | no bids | no offer | no bids | no offer | no bids | 0 | no bids | no bids |
| COT grain single-car[5] | 10 . . 25 | no offer | 0 | 3 | 0 | 0 | 0 | 0 |
| UP[4] | | | | | | | | |
| GCAS/Region 1 | no bids | 1 | no bids | no bids | no bids | no bids | n/a | n/a |
| GCAS/Region 2 | no bids | no bids | no bids | no bids | no bids | no bids | n/a | n/a |

[1]Auction offerings are for single-car and unit train shipments only.

[2]Average premium/discount to tariff, last auction

[3]BNSF - COT = Certificate of Transportation; north grain and south grain bids were combined effective the week ending 6/24/06.

[4]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.

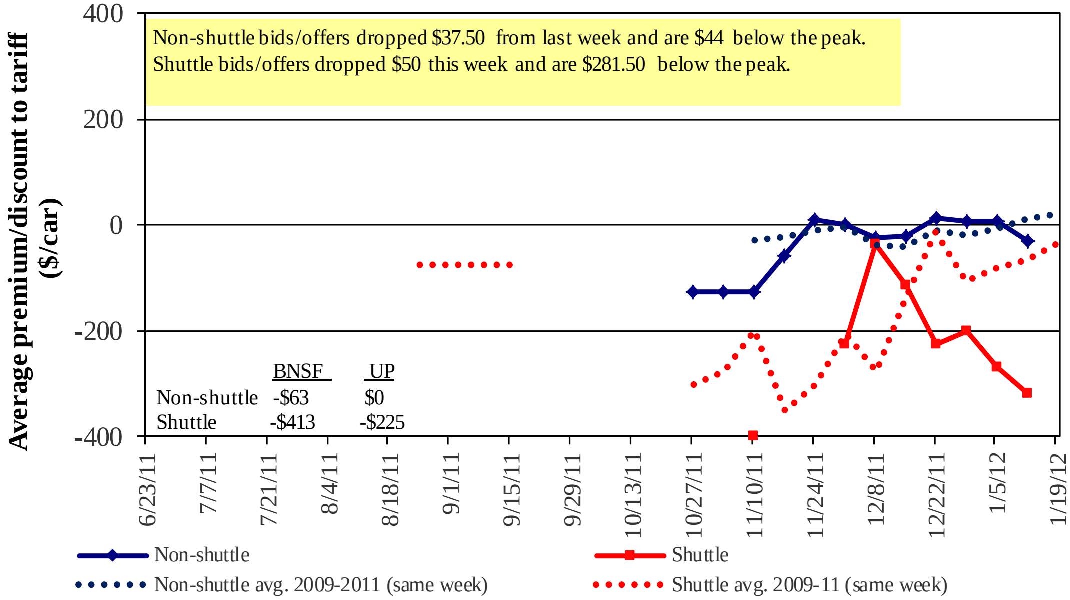
[5]Range is shown because average is not available. Not available = n/a.

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**

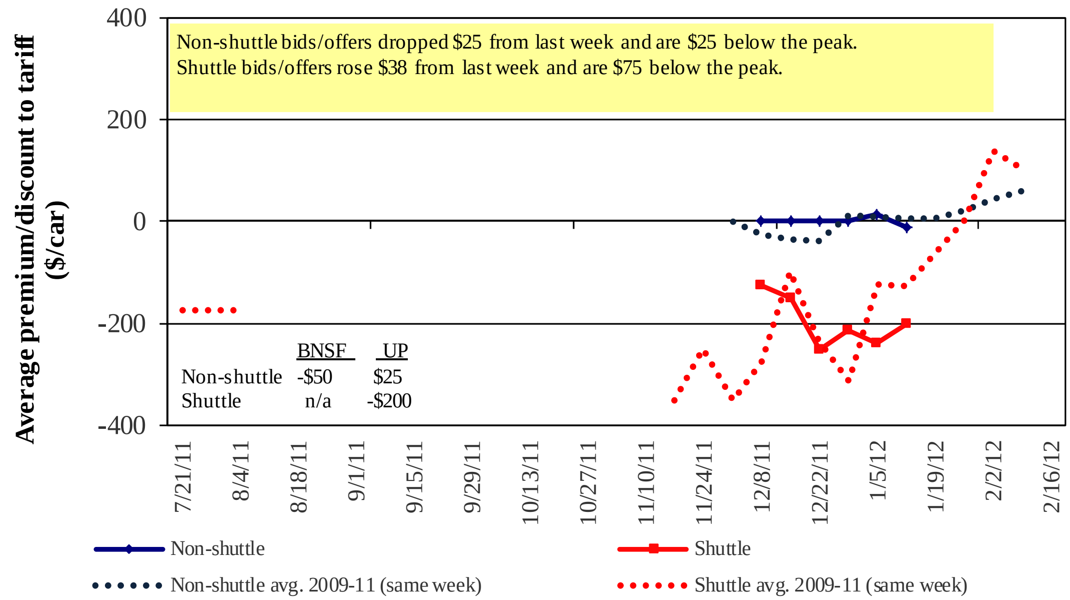



Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

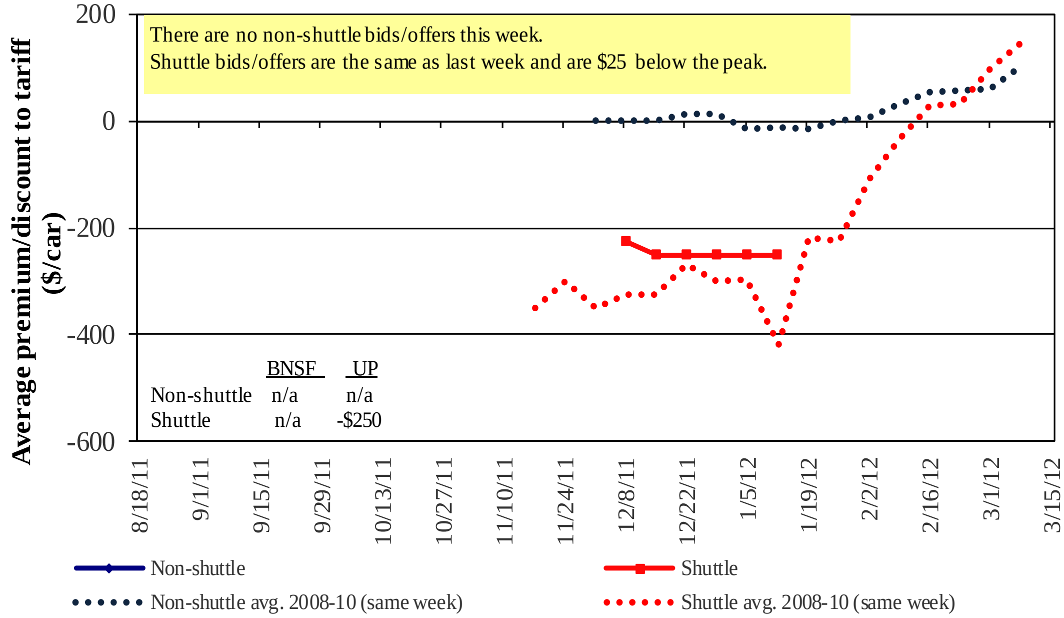



Non-shuttle bids include unit-train and single-car bids. n/a = not available.

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)[1]**

| Week ending | Delivery period | | | | | |
|---|---|---|---|---|---|---|
| 1/12/2012 | Jan-12 | Feb-12 | Mar-12 | Apr-12 | May-12 | Jun-12 |
| **Non-shuttle** | | | | | | |
| BNSF-GF | (63) | (50) | n/a | n/a | n/a | n/a |
| Change from last week | (50) | (50) | n/a | n/a | n/a | n/a |
| Change from same week 2010 | (213) | (140) | n/a | n/a | n/a | n/a |
| UP-Pool | - | 25 | n/a | n/a | n/a | n/a |
| Change from last week | (25) | - | n/a | n/a | n/a | n/a |
| Change from same week 2010 | (75) | - | n/a | n/a | n/a | n/a |
| **Shuttle[2]** | | | | | | |
| BNSF-GF | (413) | n/a | n/a | n/a | n/a | n/a |
| Change from last week | 12 | n/a | n/a | n/a | n/a | n/a |
| Change from same week 2010 | (388) | n/a | n/a | n/a | n/a | n/a |
| UP-Pool | (225) | (200) | (250) | n/a | n/a | n/a |
| Change from last week | (112) | 38 | - | n/a | n/a | n/a |
| Change from same week 2010 | n/a | 225 | 238 | n/a | n/a | n/a |

[1]Average premium/discount to tariff, $/car-last week

[2]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[1]**

| Effective date: 1/2/2012 | Origin region* | Destination region* | Tariff rate/car | Fuel surcharge per car | Tariff plus surcharge per: metric ton | Tariff plus surcharge per: bushel[2] | Percent change Y/Y[3] |
|---|---|---|---|---|---|---|---|
| **Unit train** | | | | | | | |
| Wheat | Wichita, KS | St. Louis, MO | $2,992 | $192 | $31.62 | $0.86 | 11 |
| | Grand Forks, ND | Duluth-Superior, MN | $3,097 | $110 | $31.85 | $0.87 | 19 |
| | Wichita, KS | Los Angeles, CA | $5,710 | $566 | $62.32 | $1.70 | 9 |
| | Wichita, KS | New Orleans, LA | $3,492 | $338 | $38.04 | $1.04 | 11 |
| | Sioux Falls, SD | Galveston-Houston, TX | $5,410 | $465 | $58.34 | $1.59 | 5 |
| | Northwest KS | Galveston-Houston, TX | $3,760 | $371 | $41.02 | $1.12 | 10 |
| | Amarillo, TX | Los Angeles, CA | $3,959 | $516 | $44.44 | $1.21 | 11 |
| Corn | Champaign-Urbana, IL | New Orleans, LA | $3,062 | $382 | $34.20 | $0.93 | 14 |
| | Toledo, OH | Raleigh, NC | $3,942 | $433 | $43.45 | $1.18 | 9 |
| | Des Moines, IA | Davenport, IA | $1,934 | $81 | $20.01 | $0.54 | 7 |
| | Indianapolis, IN | Atlanta, GA | $3,381 | $325 | $36.80 | $1.00 | 9 |
| | Indianapolis, IN | Knoxville, TN | $2,833 | $209 | $30.20 | $0.82 | 6 |
| | Des Moines, IA | Little Rock, AR | $3,074 | $238 | $32.89 | $0.90 | 8 |
| | Des Moines, IA | Los Angeles, CA | $4,985 | $693 | $56.38 | $1.53 | 19 |
| Soybeans | Minneapolis, MN | New Orleans, LA | $3,489 | $417 | $38.79 | $1.06 | 9 |
| | Toledo, OH | Huntsville, AL | $3,057 | $308 | $33.41 | $0.91 | 9 |
| | Indianapolis, IN | Raleigh, NC | $4,013 | $436 | $44.18 | $1.20 | 9 |
| | Indianapolis, IN | Huntsville, AL | $2,749 | $209 | $29.37 | $0.80 | 8 |
| | Champaign-Urbana, IL | New Orleans, LA | $3,406 | $382 | $37.62 | $1.02 | 13 |
| **Shuttle Train** | | | | | | | |
| Wheat | Great Falls, MT | Portland, OR | $3,239 | $326 | $35.40 | $0.96 | 8 |
| | Wichita, KS | Galveston-Houston, TX | $3,144 | $253 | $33.74 | $0.92 | 6 |
| | Chicago, IL | Albany, NY | $3,645 | $406 | $40.23 | $1.09 | 9 |
| | Grand Forks, ND | Portland, OR | $4,702 | $562 | $52.28 | $1.42 | 8 |
| | Grand Forks, ND | Galveston-Houston, TX | $5,745 | $586 | $62.87 | $1.71 | 9 |
| | Northwest KS | Portland, OR | $4,727 | $608 | $52.98 | $1.44 | 10 |
| Corn | Minneapolis, MN | Portland, OR | $4,800 | $685 | $54.47 | $1.48 | 10 |
| | Sioux Falls, SD | Tacoma, WA | $4,760 | $627 | $53.50 | $1.46 | 9 |
| | Champaign-Urbana, IL | New Orleans, LA | $2,877 | $382 | $32.37 | $0.88 | 13 |
| | Lincoln, NE | Galveston-Houston, TX | $3,310 | $366 | $36.50 | $0.99 | 10 |
| | Des Moines, IA | Amarillo, TX | $3,430 | $299 | $37.03 | $1.01 | 7 |
| | Minneapolis, MN | Tacoma, WA | $4,800 | $679 | $54.41 | $1.48 | 10 |
| | Council Bluffs, IA | Stockton, CA | $4,200 | $703 | $48.69 | $1.33 | 12 |
| Soybeans | Sioux Falls, SD | Tacoma, WA | $5,040 | $627 | $56.28 | $1.53 | 10 |
| | Minneapolis, MN | Portland, OR | $5,030 | $685 | $56.75 | $1.54 | 11 |
| | Fargo, ND | Tacoma, WA | $4,930 | $558 | $54.49 | $1.48 | 10 |
| | Council Bluffs, IA | New Orleans, LA | $3,710 | $441 | $41.22 | $1.12 | 11 |
| | Toledo, OH | Huntsville, AL | $2,672 | $308 | $29.59 | $0.81 | 10 |
| | Grand Island, NE | Portland, OR | $4,520 | $622 | $51.06 | $1.39 | 6 |

[1]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.

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

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

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[1] | Fuel surcharge per car[2] | Tariff plus surcharge per: metric ton[3] | Tariff plus surcharge per: bushel[3] | Percent change Y/Y[4] |
|---|---|---|---|---|---|---|---|
| Effective date: 1/2/2012 | | | | | | | |
| Wheat | MT | Chihuahua, CI | $7,741 | $595 | $85.17 | $2.32 | 9 |
| | OK | Cuautitlan, EM | $6,804 | $623 | $75.88 | $2.06 | 9 |
| | KS | Guadalajara, JA | $7,411 | $896 | $84.88 | $2.31 | 8 |
| | TX | Salinas Victoria, NL | $3,753 | $253 | $40.93 | $1.11 | 10 |
| Corn | IA | Guadalajara, JA | $7,699 | $918 | $88.04 | $2.23 | 8 |
| | SD | Penjamo, GJ | $7,776 | $778 | $87.41 | $2.22 | 12 |
| | NE | Queretaro, QA | $7,048 | $799 | $80.18 | $2.03 | 14 |
| | SD | Salinas Victoria, NL | $5,650 | $592 | $63.77 | $1.62 | 12 |
| | MO | Tlalnepantla, EM | $6,227 | $778 | $71.58 | $1.82 | 16 |
| | SD | Torreon, CU | $6,522 | $652 | $73.30 | $1.86 | 10 |
| Soybeans | MO | Bojay (Tula), HG | $6,986 | $803 | $79.58 | $2.16 | 9 |
| | NE | Guadalajara, JA | $7,904 | $918 | $90.14 | $2.45 | 10 |
| | IA | El Castillo, JA[5] | $8,255 | $774 | $92.25 | $2.51 | 8 |
| | KS | Torreon, CU | $6,396 | $628 | $71.77 | $1.95 | 10 |
| Sorghum | OK | Cuautitlan, EM | $5,885 | $591 | $66.17 | $1.68 | 18 |
| | TX | Guadalajara, JA | $6,653 | $507 | $73.15 | $1.86 | 11 |
| | NE | Penjamo, GJ | $7,446 | $859 | $84.86 | $2.15 | 15 |
| | KS | Queretaro, QA | $6,353 | $552 | $70.55 | $1.79 | 13 |
| | NE | Salinas Victoria, NL | $5,103 | $525 | $57.50 | $1.46 | 13 |
| | NE | Torreon, CU | $6,068 | $668 | $68.82 | $1.75 | 9 |

[1]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.

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

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

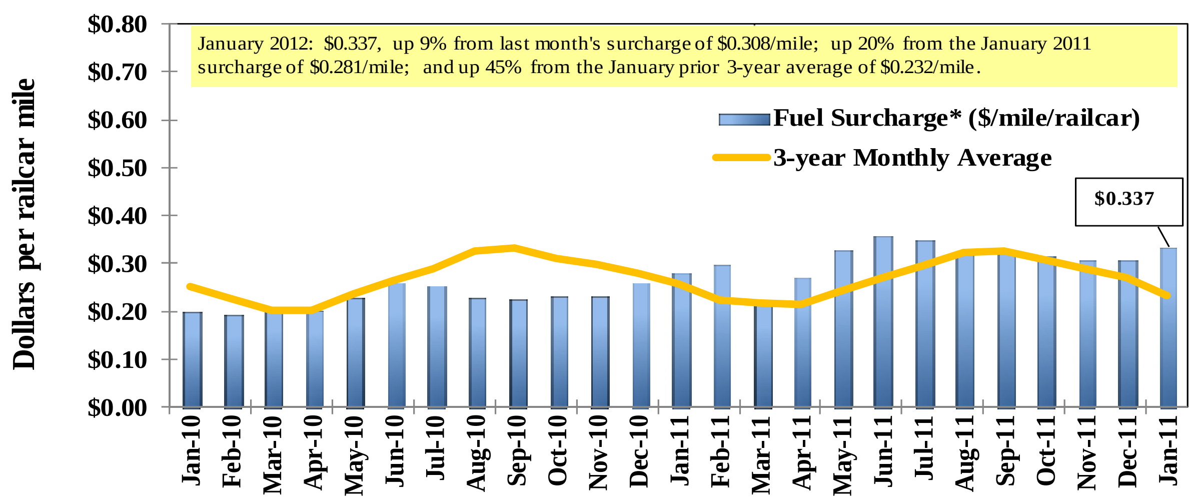
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

[5] 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[1]**




[1] 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.

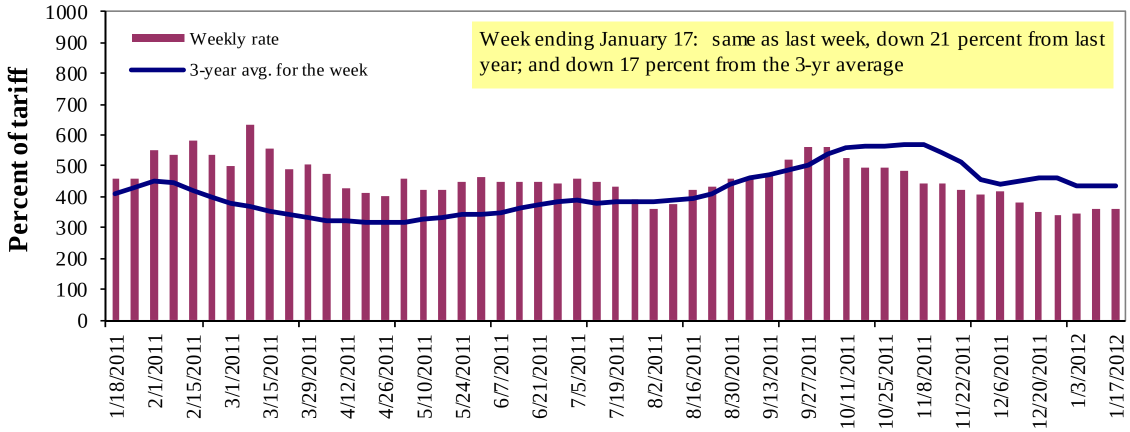
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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[1,2]**




[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]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 |
|---|---|---|---|---|---|---|---|---|
| **Rate[1]** | 1/17/2012 | -- | -- | 362 | 297 | 340 | 340 | 240 |
| | 1/10/2012 | -- | -- | 363 | 267 | 343 | 343 | 233 |
| **$/ton** | 1/17/2012 | -- | -- | 16.80 | 11.85 | 15.95 | 13.74 | 7.54 |
| | 1/10/2012 | -- | -- | 16.84 | 10.65 | 16.09 | 13.86 | 7.32 |
| **Current week % change from the same week:** | | | | | | | | |
| | Last year | -- | -- | -21 | -25 | -23 | -23 | -36 |
| | 3-year avg. [2] | -- | -- | -17 | -11 | -8 | -8 | -21 |
| **Rate[1]** | February | -- | -- | 365 | 293 | 340 | 340 | 240 |
| | April | 422 | 383 | 373 | 278 | 335 | 335 | 243 |

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]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**

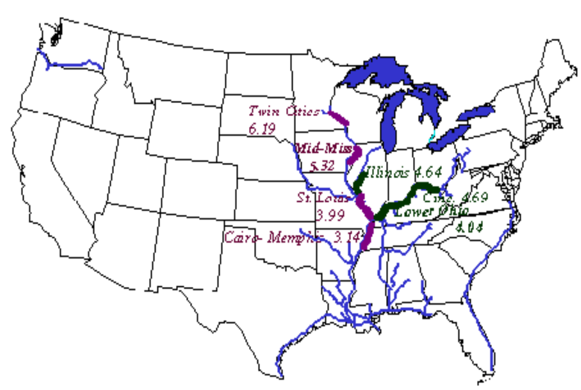
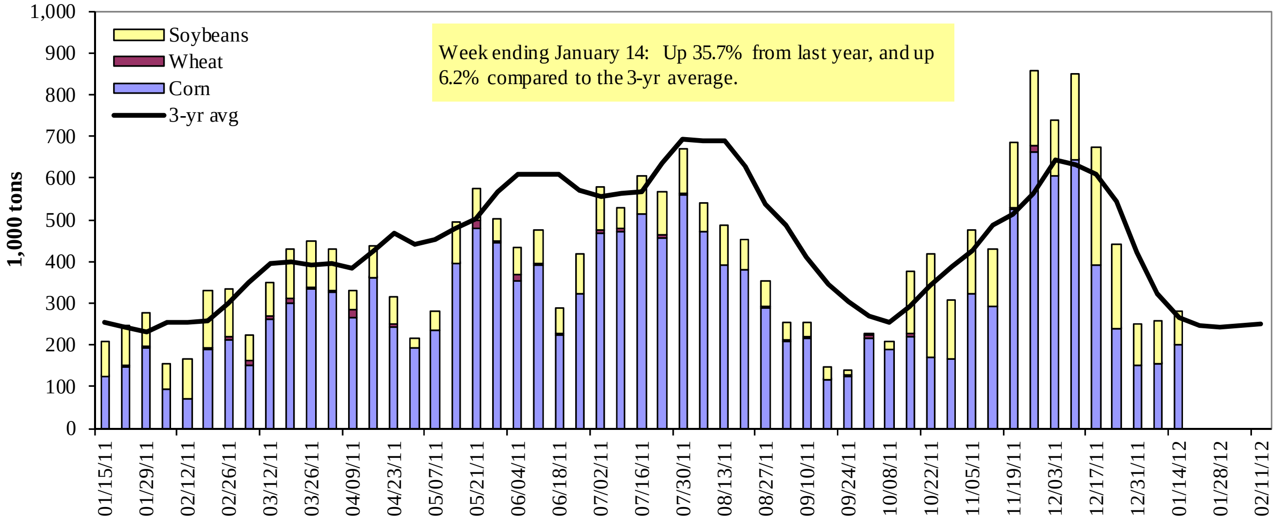


Figure 10

**Barge Movements on the Mississippi River[1] (Locks 27 - Granite City, IL)**




[1] The 3-year average is a 4-week moving average.

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

Table 10

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

| Week ending 1/14/2012 | Corn | Wheat | Soybeans | Other | Total |
|---|---|---|---|---|---|
| **Mississippi River** | | | | | |
| Rock Island, IL (L15) | 0 | 0 | 0 | 0 | 0 |
| Winfield, MO (L25) | 28 | 0 | 9 | 0 | 37 |
| Alton, IL (L26) | 268 | 2 | 106 | 0 | 376 |
| Granite City, IL (L27) | 200 | 0 | 81 | 0 | 282 |
| **Illinois River (L8)** | 188 | 2 | 80 | 0 | 269 |
| **Ohio River (L52)** | 139 | 5 | 137 | 0 | 281 |
| **Arkansas River (L1)** | 0 | 20 | 17 | 0 | 36 |
| Weekly total - 2012 | 339 | 25 | 235 | 0 | 599 |
| Weekly total - 2011 | 267 | 18 | 251 | 3 | 539 |
| 2012 YTD[1] | 593 | 46 | 468 | 0 | 1,107 |
| 2011 YTD | 543 | 37 | 518 | 8 | 1,107 |
| 2012 as % of 2011 YTD | 109 | 124 | 90 | 0 | 100 |
| Last 4 weeks as % of 2011[2] | 93 | 106 | 90 | 5 | 91 |
| Total 2011 | 19,921 | 1,460 | 8,553 | 422 | 30,356 |

[1] 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.

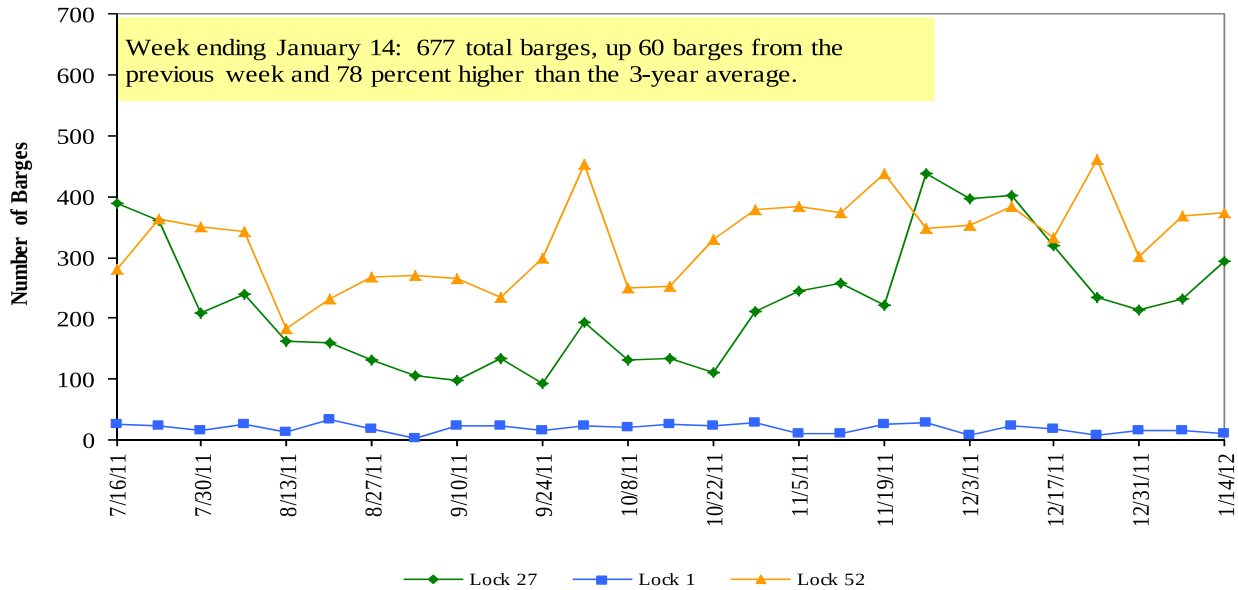
[2] As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

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

Figure 11

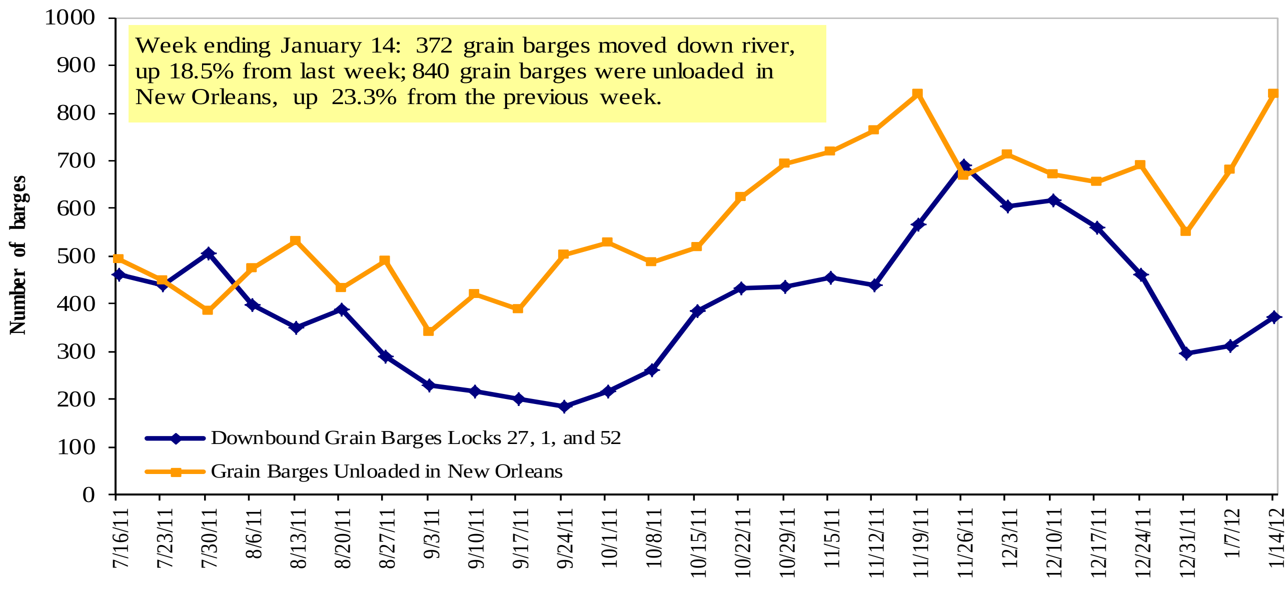
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52**




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[1], Week Ending 1/16/2012 (US $/gallon)**

| | | | Change from | |
|---|---|---|---|---|
| **Region** | **Location** | **Price** | **Week ago** | **Year ago** |
| I | East Coast | 3.943 | 0.035 | 0.495 |
| | New England | 4.076 | 0.047 | 0.516 |
| | Central Atlantic | 4.031 | 0.035 | 0.475 |
| | Lower Atlantic | 3.853 | 0.033 | 0.461 |
| II | Midwest[2] | 3.746 | 0.029 | 0.375 |
| III | Gulf Coast[3] | 3.777 | 0.027 | 0.411 |
| IV | Rocky Mountain | 3.823 | -0.020 | 0.449 |
| V | West Coast | 4.037 | 0.011 | 0.528 |
| | California | 4.116 | 0.005 | 0.554 |
| Total | U.S. | 3.854 | 0.026 | 0.447 |

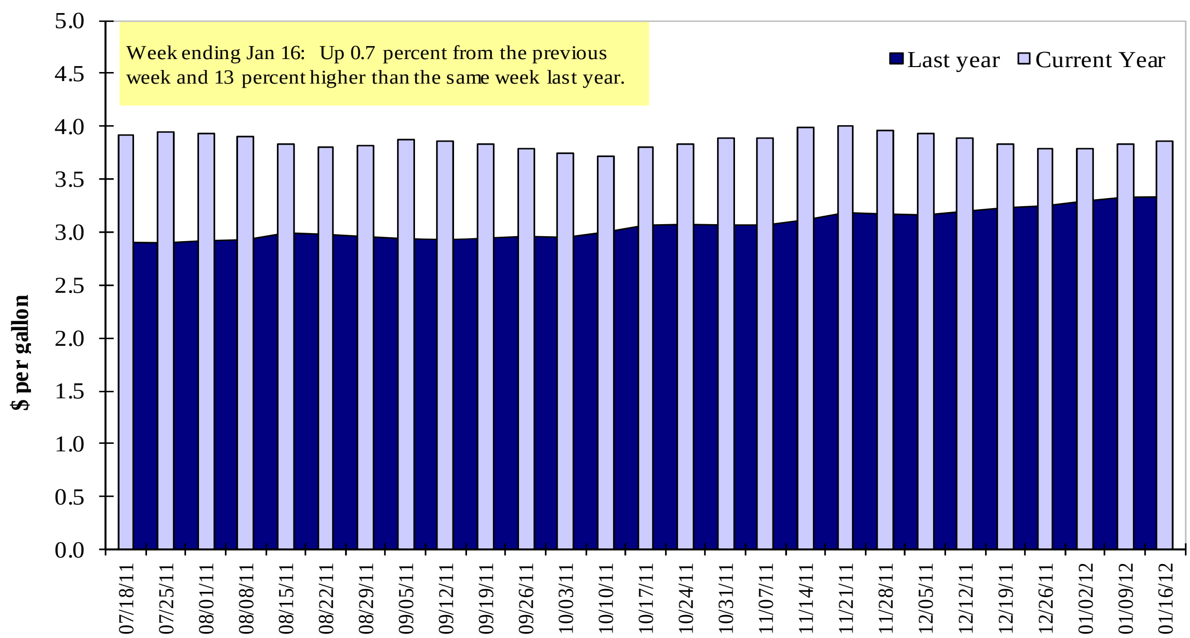
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (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)**

| | Wheat | | | | | | Corn | Soybeans | Total |
|---|---|---|---|---|---|---|---|---|---|
| Week ending | HRW | SRW | HRS | SWW | DUR | All wheat | | | |
| **Export Balances**[1] | | | | | | | | | |
| 1/5/2012 | 1,300 | 583 | 1,187 | 1,132 | 55 | 4,257 | 10,474 | 8,679 | 23,410 |
| This week year ago | 3,675 | 810 | 2,537 | 1,197 | 101 | 8,320 | 11,738 | 13,674 | 33,732 |
| **Cumulative exports-marketing year**[2] | | | | | | | | | |
| 2011/12 YTD | 6,274 | 2,059 | 4,042 | 2,965 | 358 | 15,698 | 14,519 | 15,874 | 46,091 |
| 2010/11 YTD | 8,369 | 1,234 | 4,815 | 2,788 | 672 | 17,879 | 15,026 | 22,147 | 55,052 |
| YTD 2011/12 as % of 2010/11 | 75 | 167 | 84 | 106 | 53 | 88 | 97 | 72 | 84 |
| Last 4 wks as % of same period 2010/11 | 36 | 79 | 46 | 90 | 53 | 51 | 94 | 69 | 73 |
| 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 |

[1] Current unshipped export sales to date

[2] 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[1] of U.S. Corn**

| **Week ending 01/05/12** | **Total Commitments**[2] **2011/12 Current MY** | **2010/11 Last MY** | **% change current MY from last MY** | **Exports**[3] **2010/11** |
|---|---|---|---|---|
| | - 1,000 mt - | | | - 1,000 mt - |
| Japan | 6,331 | 7,648 | (17) | 14,279 |
| Mexico | 5,868 | 4,101 | 43 | 7,019 |
| Korea | 2,403 | 3,428 | (30) | 6,104 |
| Egypt | 348 | 1,789 | (81) | 3,302 |
| Taiwan | 984 | 1,227 | (20) | 2,393 |
| **Top 5 importers** | **15,934** | **18,193** | **(12)** | **33,096** |
| **Total US corn export sales** | **24,993** | **26,763** | **(7)** | **46,610** |
| % of Projected | 60% | 57% | | |
| Change from Last Week | 322 | 438 | | |
| **Top 5 importers' share of U.S. corn export sales** | 64% | 68% | | |
| **USDA forecast, January 2012** | **41,910** | **46,600** | **(10)** | |
| **Corn Use for Ethanol USDA forecast, Ethanol January 2012** | **127,000** | **127,534** | **(0.4)** | |

(n) indicates negative number.

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

[2]Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3]FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 14

**Top 5 Importers[1] of U.S. Soybeans**

| **Week Ending 01/05/2012** | **Total Commitments[2] 2011/12 Current MY** | **2010/11 Last MY** | **% change current MY from last MY** | **Exports[3] 2010/11** |
|---|---|---|---|---|
| | - 1,000 mt - | | | - 1,000 mt - |
| China | 17,201 | 22,840 | (25) | 24,445 |
| Mexico | 1,590 | 1,809 | (12) | 3,215 |
| Japan | 1,128 | 1,225 | (8) | 1,887 |
| EU-25 | 350 | 1,588 | (78) | 2,607 |
| Indonesia | 697 | 878 | (21) | 1,397 |
| **Top 5 importers** | **20,966** | **28,340** | **(26)** | **33,551** |
| **Total US soybean export sales** | **24,554** | **35,821** | **(31)** | **40,690** |
| % of Projected | 71% | 88% | | |
| Change from last week | 434 | 420 | | |
| **Top 5 importers' share of U.S. soybean export sales** | 85% | 79% | | |
| **USDA forecast, January 2012** | **34,700** | **40,860** | **(15)** | |
| **Soybean Use for Biodiesel USDA forecast, January 2012** | **8,632** | **6,115** | **41** | |

(n) indicates negative number.

[1] Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3] FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

**Top 10 Importers[1] of All U.S. Wheat**

| **Week Ending 01/05/2012** | **Total Commitments[2] 2011/12 Current MY** | **2010/11 Last MY** | **% change current MY from last MY** | **Exports[3] 2010/11** |
|---|---|---|---|---|
| | - 1,000 mt - | | | - 1,000 mt - |
| Nigeria | 2,370 | 2,387 | (1) | 3,233 |
| Japan | 2,700 | 2,586 | 4 | 3,148 |
| Mexico | 2,706 | 2,272 | 19 | 2,601 |
| Philippines | 1,764 | 1,721 | 2 | 1,518 |
| Korea | 1,089 | 1,273 | (14) | 1,111 |
| Peru | 563 | 739 | (24) | 923 |
| Taiwan | 704 | 664 | 6 | 913 |
| Colombia | 424 | 593 | (29) | 783 |
| Indonesia | 524 | 443 | 18 | 781 |
| Yemen | 272 | 513 | (47) | 659 |
| **Top 10 importers** | **13,116** | **13,191** | **(1)** | **15,670** |
| **Total US wheat export sales** | **19,955** | **26,199** | **(24)** | **33,439** |
| % of Projected | 77% | 75% | | |
| Change from last week | 357 | 148 | | |
| **Top 10 importers' share of U.S. wheat export sales** | 66% | 50% | | |
| **USDA forecast, January 2012** | **25,860** | **35,080** | **(26)** | |

(n) indicates negative number.

[1] Modified from the FAS **2010/11** Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.

[2] Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

[3] 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 01/12/12 | Previous Week[1] | Current Week as % of Previous | 2012 YTD[1] | 2011 YTD[1] | 2012 YTD as % of 2011 YTD | Last 4-weeks as % of 2011 | Last 4-weeks as % of 3-yr. avg. | Total[1] 2011 |
|---|---|---|---|---|---|---|---|---|---|
| **Pacific Northwest** | | | | | | | | | |
| Wheat | 167 | 107 | 157 | 274 | 507 | 54 | 78 | 100 | 13,995 |
| Corn | 69 | 119 | 58 | 188 | 259 | 73 | 134 | 124 | 9,198 |
| Soybeans | 331 | 195 | 170 | 526 | 251 | 209 | 143 | 140 | 7,321 |
| **Total** | **567** | **421** | **135** | **988** | **1,017** | **97** | **113** | **121** | **30,513** |
| **Mississippi Gulf** | | | | | | | | | |
| Wheat | 87 | 47 | 186 | 134 | 101 | 133 | 100 | 117 | 5,031 |
| Corn | 561 | 574 | 98 | 1,135 | 484 | 235 | 120 | 116 | 26,267 |
| Soybeans | 640 | 571 | 112 | 1,211 | 1,534 | 79 | 103 | 95 | 19,262 |
| **Total** | **1,288** | **1,192** | **108** | **2,480** | **2,118** | **117** | **109** | **104** | **50,560** |
| **Texas Gulf** | | | | | | | | | |
| Wheat | 100 | 132 | 76 | 232 | 437 | 53 | 59 | 94 | 10,837 |
| Corn | 1 | 0 | n/a | 1 | 35 | 4 | 5 | 9 | 1,021 |
| Soybeans | 0 | 0 | n/a | 0 | 173 | 0 | 0 | 0 | 926 |
| **Total** | **101** | **132** | **77** | **234** | **645** | **36** | **38** | **58** | **12,784** |
| **Interior** | | | | | | | | | |
| Wheat | 11 | 8 | 143 | 18 | 57 | 32 | 90 | 90 | 1,110 |
| Corn | 129 | 158 | 82 | 287 | 150 | 191 | 69 | 163 | 7,509 |
| Soybeans | 123 | 62 | 199 | 184 | 102 | 181 | 123 | 141 | 4,273 |
| **Total** | **263** | **227** | **116** | **489** | **309** | **158** | **57** | **150** | **12,892** |
| **Great Lakes** | | | | | | | | | |
| Wheat | 0 | 0 | n/a | 0 | 0 | n/a | 0 | 0 | 1,038 |
| Corn | 0 | 0 | n/a | 0 | 0 | n/a | 0 | 0 | 178 |
| Soybeans | 0 | 0 | n/a | 0 | 0 | n/a | n/a | 913 | 382 |
| **Total** | **0** | **0** | **n/a** | **0** | **0** | **n/a** | **107** | **174** | **1,598** |
| **Atlantic** | | | | | | | | | |
| Wheat | 0 | 0 | 94 | 1 | 81 | 1 | 1 | 2 | 686 |
| Corn | 4 | 12 | 37 | 16 | 21 | 78 | 147 | 163 | 295 |
| Soybeans | 21 | 44 | 47 | 65 | 80 | 82 | 129 | 121 | 1,042 |
| **Total** | **26** | **56** | **46** | **82** | **181** | **45** | **90** | **105** | **2,022** |
| **U.S. total from ports[2]** | | | | | | | | | |
| Wheat | 366 | 294 | 125 | 660 | 1,183 | 56 | 69 | 97 | 32,697 |
| Corn | 765 | 862 | 89 | 1,627 | 948 | 172 | 123 | 121 | 44,466 |
| Soybeans | 1,115 | 871 | 128 | 1,986 | 2,139 | 93 | 106 | 102 | 33,205 |
| **Total** | **2,245** | **2,027** | **111** | **4,273** | **4,271** | **100** | **102** | **107** | **110,369** |

[1] Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

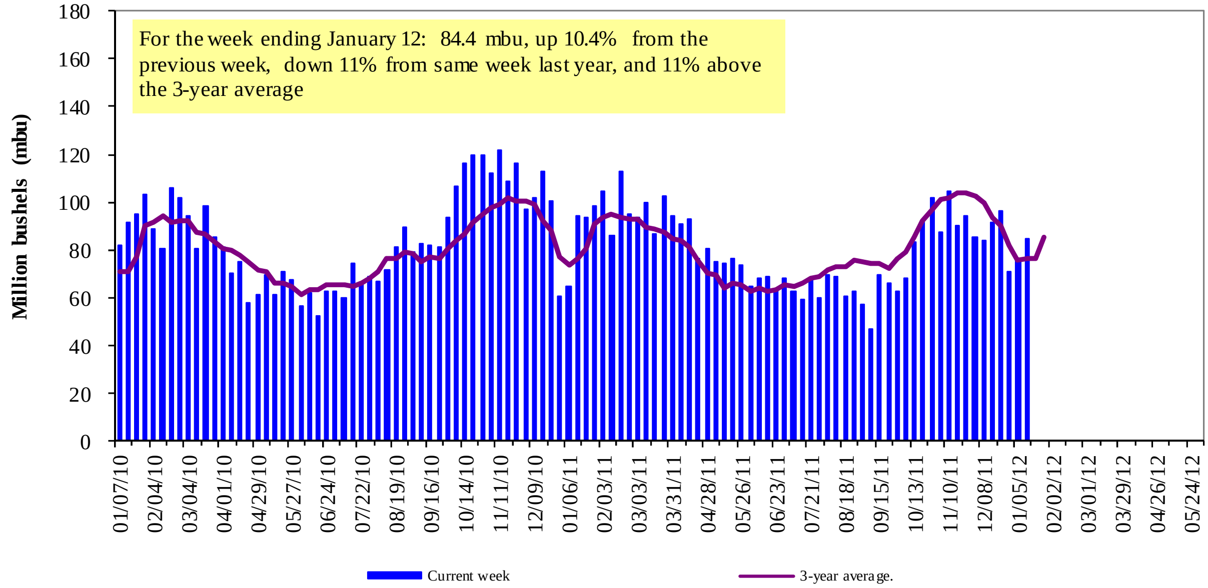
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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

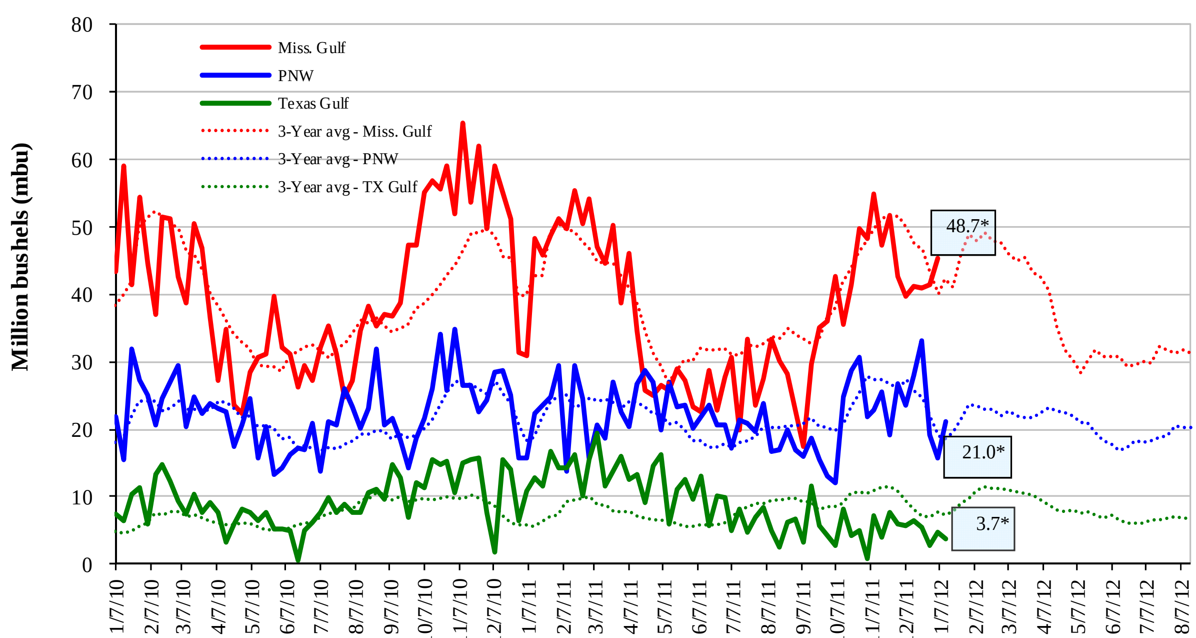



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

## U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)




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

| Jauuary 12 % change from: | MS Gulf | TX Gulf | U.S. Gulf | PNW |
|---|---|---|---|---|
| Last week | up 8 | down 23 | up 5 | up 33 |
| Last year (same week) | up 1 | down 71 | down 14 | down 6 |
| 3-yr avg. (4-wk mov. avg.) | up 15 | down 49 | up 6 | up 12 |

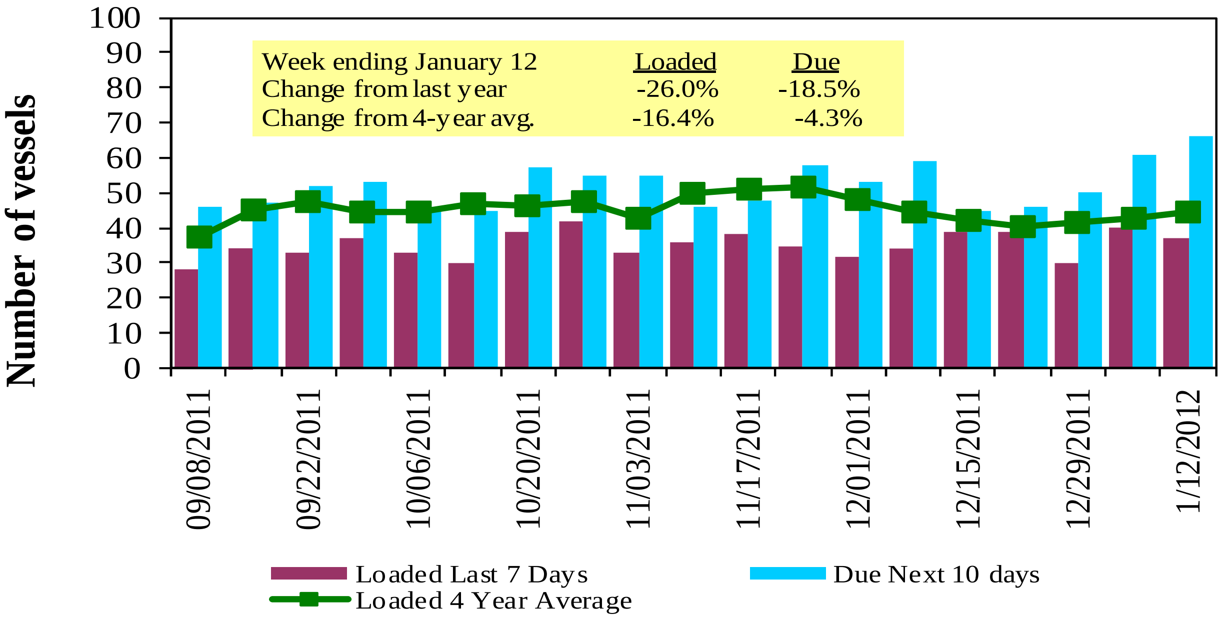
# Ocean Transportation

Table 17
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

| | Gulf | | | Pacific Northwest | Vancouver B.C. |
|---|---|---|---|---|---|
| Date | In port | Loaded 7-days | Due next 10-days | In port | In port |
| 1/12/2012 | 25 | 37 | 66 | 10 | n/a |
| 1/5/2012 | 21 | 40 | 61 | 10 | 6 |
| 2011 range | (14..65) | (28..54) | (34..83) | (5..25) | (1..20) |
| 2011 avg. | 31 | 38 | 53 | 15 | 12 |

Source: Transportation & Marketing Programs/AMS/USDA

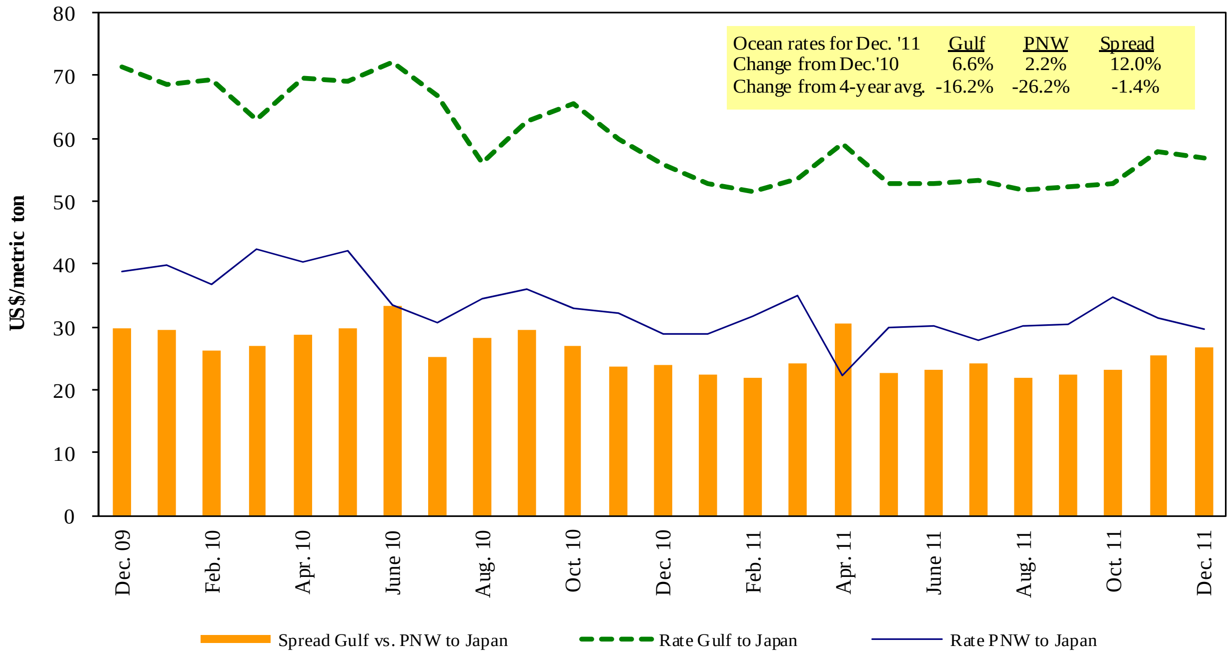
**Figure 16**
**U.S. Gulf[1] Vessel Loading Activity**




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 1/14/2012**

| 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 | Tunisia | Soybeans | Jan 10/15 | 30,000 | 37.50 |
| U.S. Gulf | Djibouti[1] | 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 |
| 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

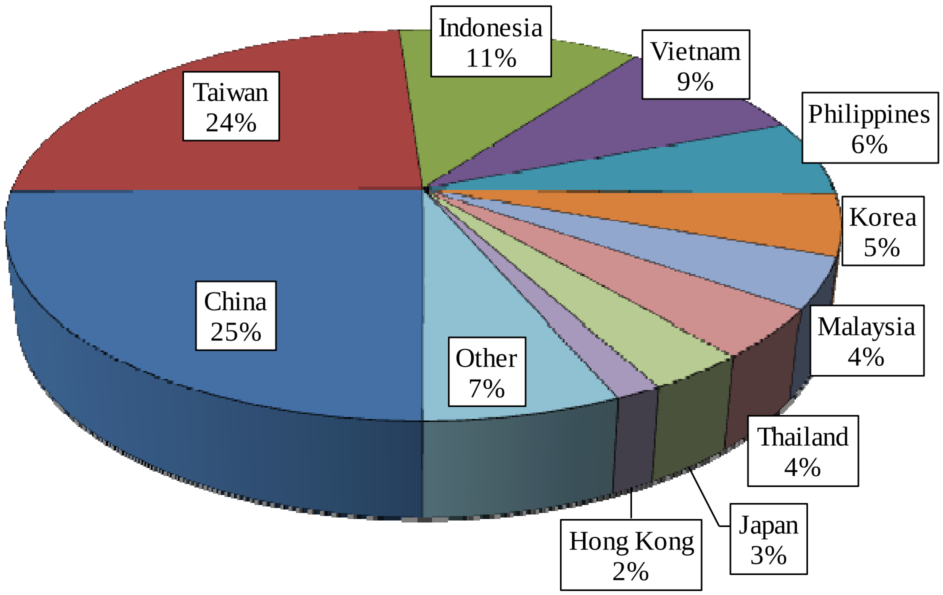
[1] 75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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, October 2011**

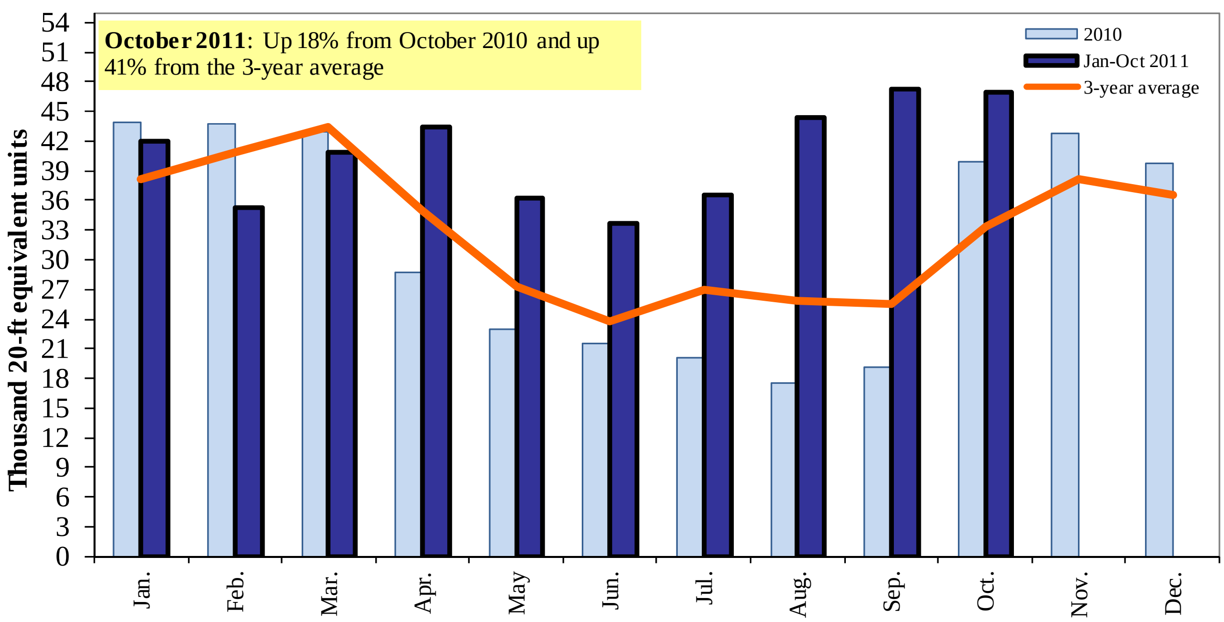



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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**.

# Contacts and Links

| | | |
|---|---|---|
| Coordinators | | |
| Surajudeen (Deen) Olowolayemo | surajudeen.olowolayemo@ams.usda.gov | (202) 720 - 0119 |
| Pierre Bahizi | pierre.bahizi@ams.usda.gov | (202) 690 - 0992 |
| Adam Sparger | adam.sparger@ams.usda.gov | (202) 205 - 8701 |
| Weekly Highlight Editors | | |
| Marina Denicoff | marina.denicoff@ams.usda.gov | (202) 690 - 3244 |
| Surajudeen (Deen) Olowolayemo | surajudeen.olowolayemo@ams.usda.gov | (202) 720 - 0119 |
| April Taylor | april.taylor@ams.usda.gov | (202) 295 - 7374 |
| Nicholas Marathon | nick.marathon@ams.usda.gov | (202) 690 - 4430 |
| Grain Transportation Indicators | | |
| Surajudeen (Deen) Olowolayemo | surajudeen.olowolayemo@ams.usda.gov | (202) 720 - 0119 |
| Rail Transportation | | |
| Marvin Prater | marvin.prater@ams.usda.gov | (202) 720 - 0299 |
| Johnny Hill | johnny.hill@ams.usda.gov | (202) 690 - 3295 |
| Adam Sparger | adam.sparger@ams.usda.gov | (202) 205 - 8701 |
| Barge Transportation | | |
| Nicholas Marathon | nick.marathon@ams.usda.gov | (202) 690 - 4430 |
| April Taylor | april.taylor@ams.usda.gov | (202) 295 - 7374 |
| Truck Transportation | | |
| April Taylor | april.taylor@ams.usda.gov | (202) 295 - 7374 |
| Grain Exports | | |
| Johnny Hill | johnny.hill@ams.usda.gov | (202) 690 - 3295 |
| Marina Denicoff | marina.denicoff@ams.usda.gov | (202) 690 - 3244 |
| Ocean Transportation | | |
| Surajudeen (Deen) Olowolayemo (Freight rates and vessels) | surajudeen.olowolayemo@ams.usda.gov | (202) 720 - 0119 |
| April Taylor (Container movements) | april.taylor@ams.usda.gov | (202) 295 - 7374 |

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