



April 28, 2011

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## WEEKLY HIGHLIGHTS

### Rail Deliveries to Texas Gulf Increase

Since the Russian grain export embargo was announced in August 2010, U.S. wheat exports have continued to be much stronger than normal. This is shown graphically by **grain inspection** activity above the 3-year average at the Texas Gulf ports starting in early September 2010 and continuing to date. Also, U.S. **year-to-date inspections of wheat** were up 79 percent compared to last year, and wheat inspections during the last four weeks increased 82 percent above last year and 71 percent above the 3-year average. Finally, **railcar deliveries to port** shows that year-to-date deliveries to the Texas Gulf have been 36,586 railcars compared to 24,376 at this time in 2010, a 50 percent increase.

### Midwest Flood Conditions Impair Transportation

Heavy rains this spring have caused major flooding of cropland and local roads in much of the Upper and Central Midwest. Some rail lines are also flooded or have been closed by local officials, causing disruptions to rail traffic. Most of the Mississippi River system is experiencing high water; at this time, 16 locks on the Upper Mississippi, Ohio, Kaskaskia, and Arkansas rivers are closed to navigation because of flooding. In addition to transportation disruptions, planting is also likely to be delayed by the flooding. Only 9 percent of the U.S. corn crop has been planted so far, 14 percentage points behind the 5-year average.

### Total Grain Inspections Continue to Recede

For the week ending April 21, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.71 million metric tons (mmt), down 19.4 percent from the previous week but 34 percent above last year at this time. Corn inspections (.780 mmt) remained steady, but wheat and soybeans dropped 26 and 44 percent from the previous week as shipments to North Africa and Asia receded. Despite the decrease in total grain inspections, Pacific Northwest inspections increased 6 percent from the past week.

### Panama Canal Lock Maintenance Scheduled

The East Lane of the Miraflores Locks is tentatively scheduled for repair and maintenance work on May 3 and 5 for half a day each. The estimated transit capacity of the Canal due to the maintenance work is 33–35 vessels compared to normal transit capacity of 38–40 vessels per day. At this time, no major delays are anticipated.

## Snapshots by Sector

### **Rail**

U.S. railroads originated 23,407 **carloads of grain** during the week ending April 16, down 1 percent from last week, up 11 percent from last year, and 10 percent higher than the 3-year average.

During the week ending April 21, average May **non-shuttle secondary railcar bids/offers** were \$22.50 above tariff, down \$19.50 from last week. Average shuttle rates were \$391.50 below tariff, up \$58.50 from last week.

### **Ocean**

During the week ending April 21, 35 **ocean-going grain vessels** were loaded in the Gulf, up 9 percent from last year. Forty-four vessels are expected to be loaded in the U.S. Gulf within the next 10 days, unchanged from last year.

During the week ending April 21, the cost of shipping grain from the Gulf to Japan averaged \$50.50 per mt, down 3 percent from the previous week. The rate from the Pacific Northwest to Japan was \$28 per mt, down 7 percent from the previous week.

### **Barge**

During the week ending April 23, **barge grain movements** totaled 468,222 tons, 17 percent lower than the previous week and 23 percent lower than the same period last year.

During the week ending April 23, 301 grain barges **moved down river**, down 16 percent from last week; 302 grain barges were **unloaded in New Orleans**, down 32 percent from the previous week.

### **Fuel**

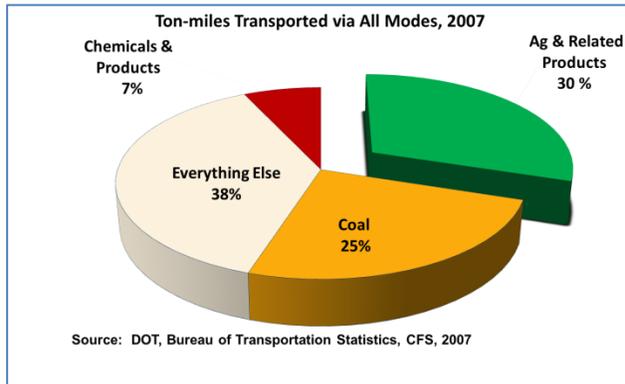
During the week ending April 25, U.S. average **diesel fuel prices** decreased 1cent per gallon to \$4.10—down 0.17 percent from the previous week but 33 percent higher than the same week last year.

## Transportation of U.S. Grains: A Modal Share Analysis, 1978–2007

On April 19, USDA issued an updated [modal share analysis](#) report. The report examines trends in the modes of transportation used to move grains grown for the food and feed industry and, more recently, the biofuel industry. The analysis includes estimated volumes of corn, wheat, soybeans, sorghum, and barley moved to the domestic market and to U.S. ports for export between 1978 and 2007 via rail, barge, and truck. The modal share data can be used to analyze the transportation implications of the underlying changes in the fundamental supply and demand of the commodities. It can help answer questions such as: “What are the transportation implications if the demand for U.S. wheat from overseas surges unexpectedly?” The report shows that wheat destined for the export market will likely move by rail to border points, therefore an increase in wheat exports will most likely cause an increase in rail movements.

The majority of grains and oilseeds are grown in the Midwest and rely on an efficient and effective transportation system. Figure 1 illustrates the importance of transportation to agriculture and vice versa.

**Figure 1. Agriculture is the Largest User of the U.S. Transportation System**



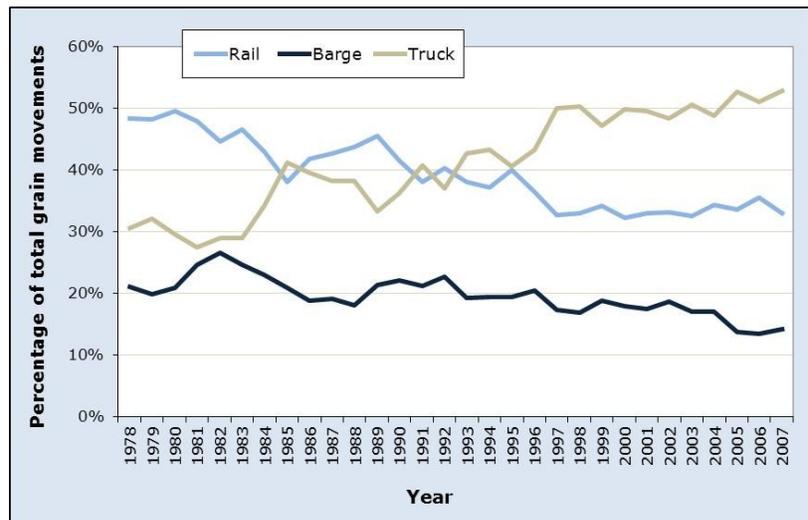
According to the Bureau of Transportation Statistics, agriculture, with 30 percent of all ton-miles transported via all modes, was the largest user of the transportation system. Coal came in second with 25 percent.

For a more comprehensive examination of the agricultural transportation system refer to the USDA’s April 2010, [Study of Rural Transportation Issues](#). Specifically, Chapter 2 looks at the Importance of Freight Transportation to Agriculture.

### Modal Shares

The most significant trend in a single mode of moving grain was the overwhelming increase in the volume of grain moved by trucks (see figure 2). In terms of percent of total movements, the truck share became the dominant mode in 1993, surpassing that of rail, and has been gaining market share from rail and barge. The use of trucks to transport grain allows farmers the flexibility of delivering their products to different markets. With new markets, such as local ethanol facilities, grain producers have more options for selling grain to maximize profits. During the study period, the grain shipment share of rail and barge declined. Truck use increased from 31 percent in 1978 to 53 percent of all movements in 2007. The share of rail movements decreased from 48 to 33 percent, and barge decreased from 21 to 14 percent.

**Figure 2. U.S. Grain Modal Shares, 1978 – 2007**



The modal share percentages are different for domestic than for export movements. Trucks remain the principal mode for the domestic market, and in recent years rail has moved the highest percentage of grain exports. Barge had been the principal mode of transport for export grain until 2005. Barge lost some shares in the export market beginning in the fall of 2004, when the decrease in the barge fleet size began to affect barge availability as the demand for non-grain commodities increased. Table 1 shows a summary of modal shares for each of the three major grains for 2007 compared with the average for the preceding 5 years (2003-2007).

**Table 1. Modal share of all grains, by market, 2007 and 5-year average\***

Mode/Year	All Grains (percent by market)		
	Exports	Domestic	Total
<b>Rail</b>			
2007	46	27	33
5-yr avg	45	29	34
<b>Barge</b>			
2007	44	1	14
5-yr avg	48	2	15
<b>Truck</b>			
2007	11	71	53
5-yr avg	7	69	51

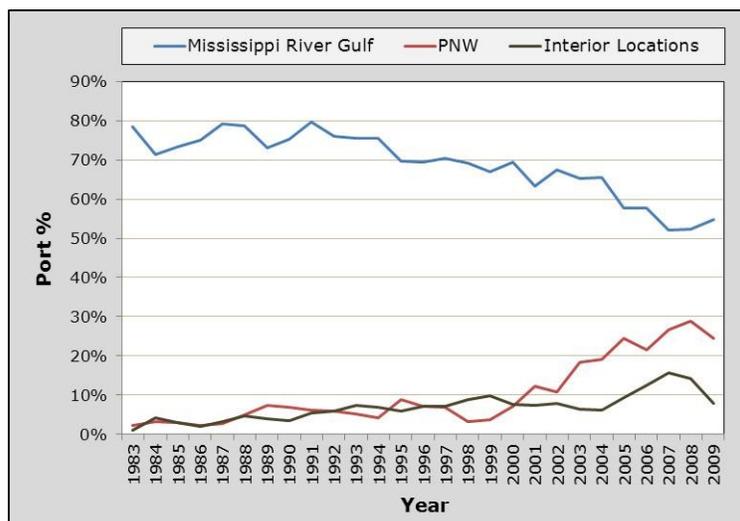
\*percentages may not add to 100 due to rounding

### Shifts in Export Markets

Changes in port shares of grain exports also affect a modal shift. The Mississippi River is, and has been, the leading port region for grain exports, handling from 44 to 62 percent of all grain exports from 1983 to 2009. During that time, the Mississippi River was the leading port for exporting corn and soybeans. From 1983 to 1989, the Texas Gulf was the leading port for wheat exports, but since 1989, the Pacific Northwest surpassed Texas Gulf as the leading port for wheat exports, mainly due to the rapidly growing demand for U.S. grains and oilseeds from Asia.

Figure 3 shows an increase in the PNW port share of soybean exports, illustrating the most dramatic of shifts in port destinations among the U.S. grains and oilseed exports. Since 1991, the Mississippi Gulf lost a significant amount of port share for soybeans—dropping from 80 percent to 55 percent—while the port share of PNW increased from 5 percent to 24 percent. Transportation factors favor PNW, as China and Southeast Asia have been among the strongest markets for U.S. soybeans and are expected to remain the growth markets. Additionally, improvements in soybean genetics over recent years have allowed for a geographic expansion of the major soybean-producing areas to shift further west and thus favored the PNW, which is closer to the new growing region than the Mississippi River port region. Soybeans move to the PNW via rail and to the Mississippi River via barge. Because total U.S. soybean exports have been reaching record levels over the past few years, extra capacity at the PNW ports has facilitated the competitive position of U.S. soybeans.

**Figure 3. Port Share of soybeans exports, 1983 - 2009**



### Conclusion

Modal share data and analysis combined with port share data can help explain the relative changes in transportation modes over time. This data can also be used in estimating future grain transportation demand based on changes in grain supply and demand forecasts.

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# Grain Transportation Indicators

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

Week ending	Truck	Rail <sup>2</sup>	Barge	Ocean	
				Gulf	Pacific
04/27/11	275	118	223	226	199
04/20/11	276	137	229	233	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)**

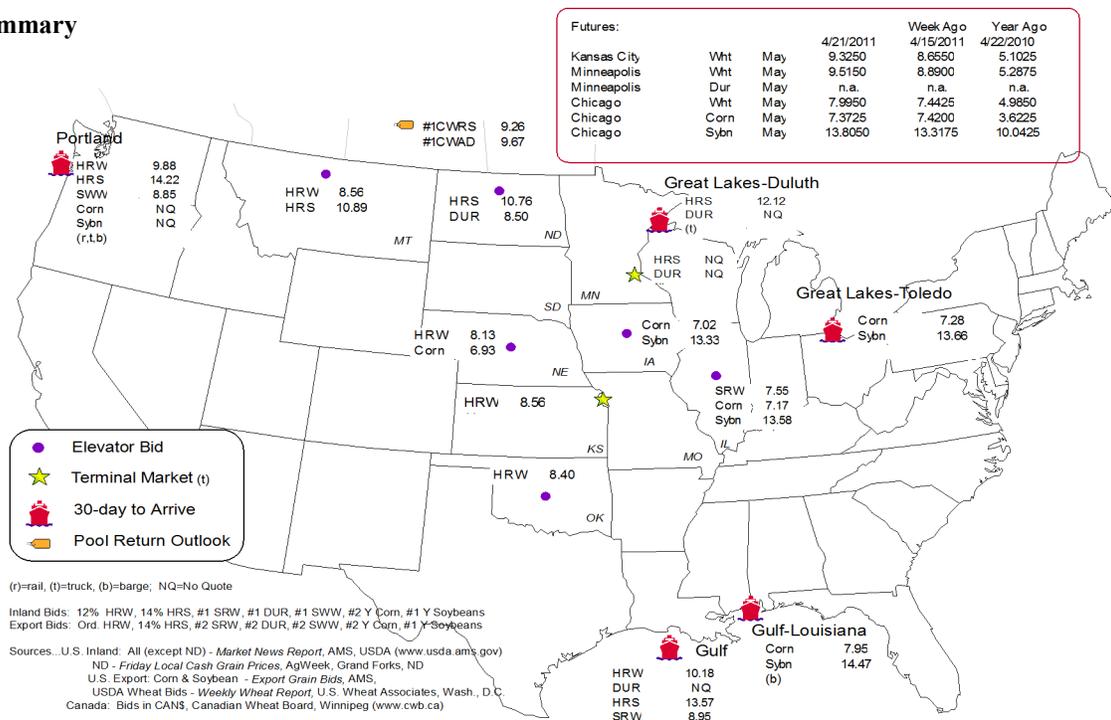
Commodity	Origin--Destination	4/21/2011	4/15/2011
Corn	IL--Gulf	-0.78	-0.80
Corn	NE--Gulf	-1.02	-1.05
Soybean	IA--Gulf	-1.14	-1.12
HRW	KS--Gulf	-1.62	-1.57
HRS	ND--Portland	-3.46	-3.45

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	
4/20/2011 <sup>P</sup>	228	1,818	1,265	4,008	564	7,883
4/13/2011 <sup>r</sup>	703	2,654	1,116	3,990	539	9,002
2011 YTD	16,862	36,586	12,749	63,968	11,582	141,747
2010YTD	6,508	24,376	14,811	54,759	15,448	115,902
2011 YTD as % of 2010 YTD	259	150	86	117	75	122
Last 4 weeks as % of 2010 <sup>2</sup>	547	179	132	127	120	149
Last 4 weeks as % of 4-year avg. <sup>2</sup>	128	166	155	95	116	119
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.

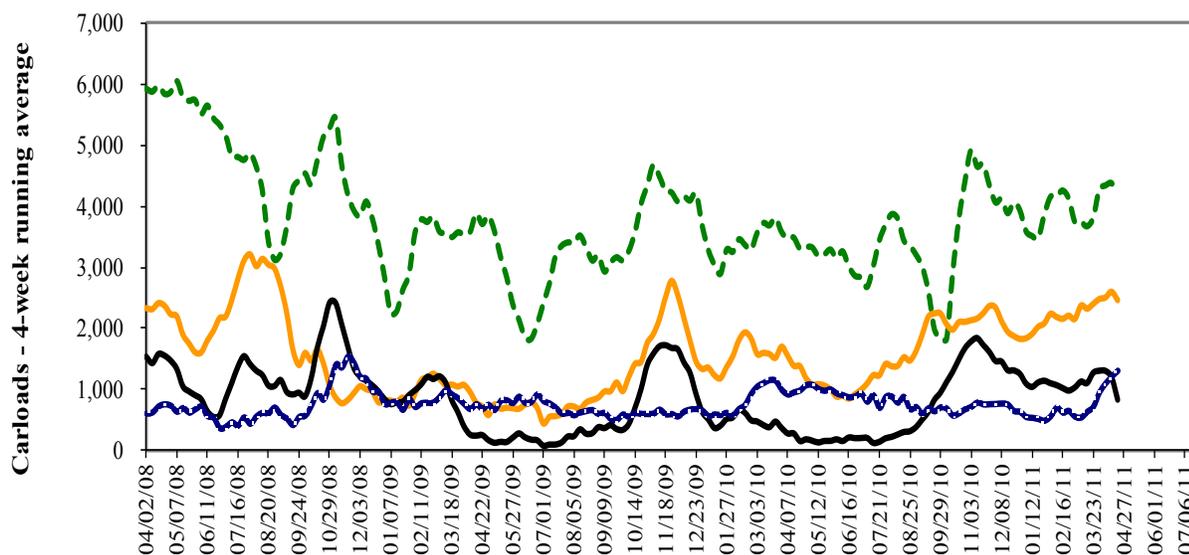
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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



- Pacific Northwest: 4wks. ending 4/20--up 27% from same period last year, down 5% from 4-year average
- Texas Gulf: 4 wks. ending 4/20-- up 79% from same period last year, up 66% from 4-year average
- Miss. River: 4 wks. Ending 4/20 -- up 447% from same period last year, up 28% from 4-year average
- ... Cross-border Mexico: 4 wks. ending 4/20 -- up 32% from same period last year; up 55% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

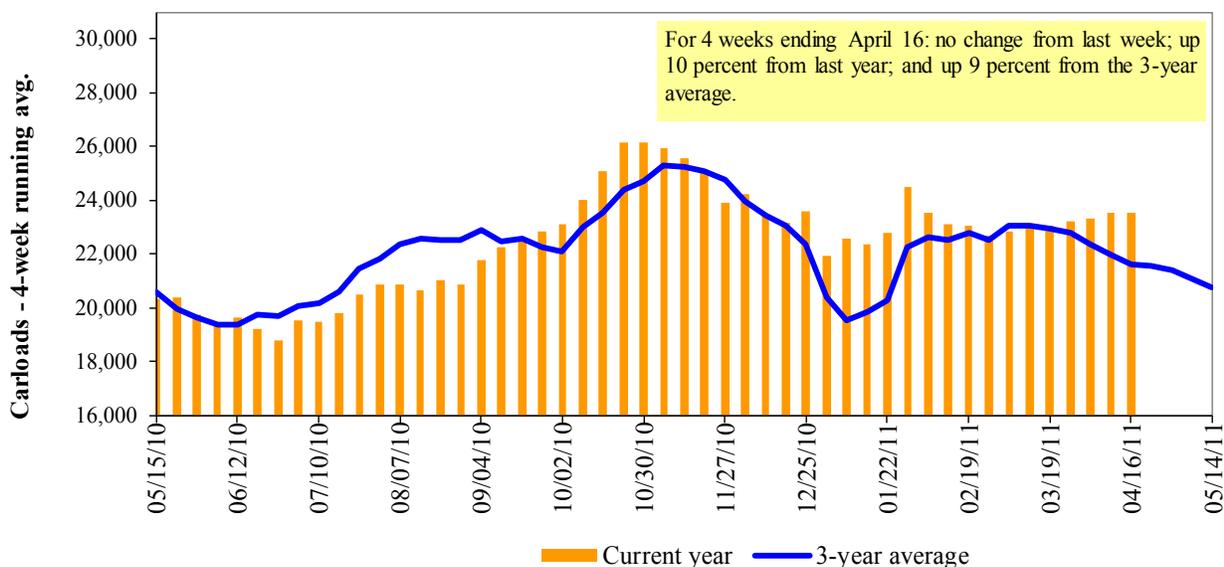
Table 4

**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
04/16/11	2,282	2,900	11,180	833	6,212	23,407	4,378	4,750
This week last year	1,476	2,613	10,257	688	6,066	21,100	4,213	5,553
2011 YTD	32,496	45,076	171,524	9,182	93,409	351,687	60,797	69,103
2010 YTD	34,492	45,231	161,753	11,586	82,885	335,947	61,369	79,859
2011 YTD as % of 2010 YTD	94	100	106	79	113	105	99	87
Last 4 weeks as % of 2010 <sup>1</sup>	105	106	110	91	116	110	113	89
Last 4 weeks as % of 3-yr avg.	87	111	113	99	112	109	111	95
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

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

Week ending	Delivery period							
	May-11	May-10	Jun-11	Jun-10	Jul-11	Jul-10	Aug-11	Aug-10
4/21/2011								
BNSF <sup>3</sup>								
COT grain units	no offer	0	3	0	9	no bids	no offer	0
COT grain single-car <sup>5</sup>	no offer	0 .. 12	27 .. 70	0 .. 1	27 .. 70	0 .. 1	no offer	0 .. 4
UP <sup>4</sup>								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

<sup>2</sup>Average premium/discount to tariff, last auction

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

<sup>4</sup>UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

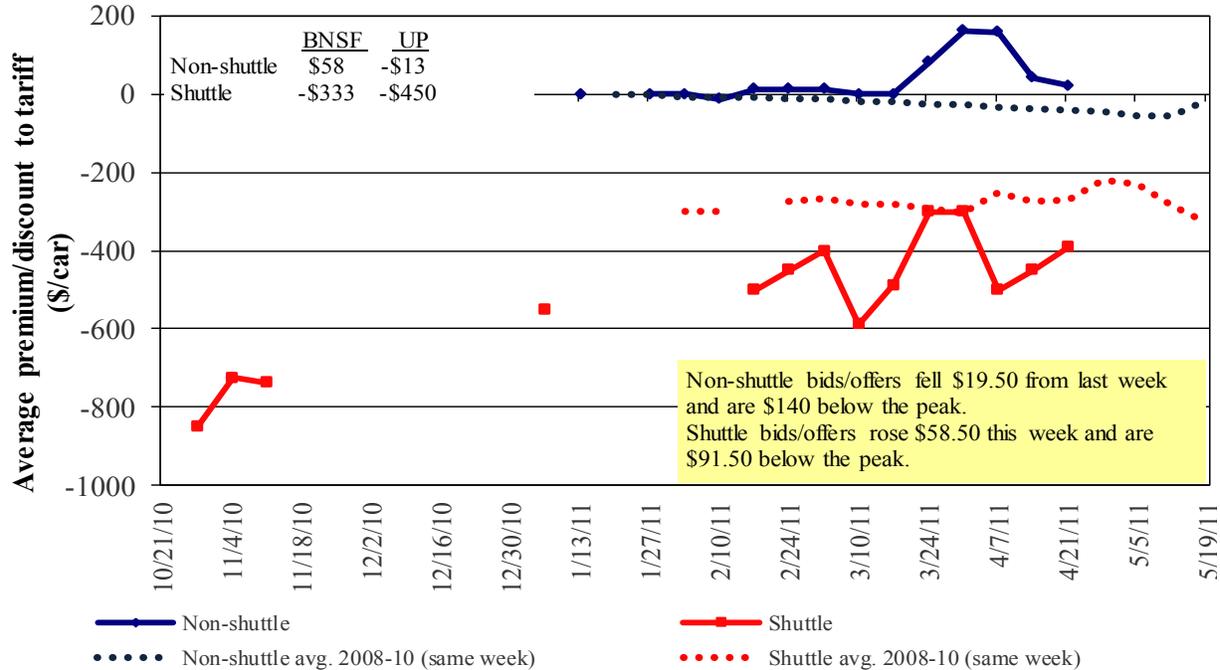
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4

**Bids/Offers for Railcars to be Delivered in May 2011, Secondary Market**

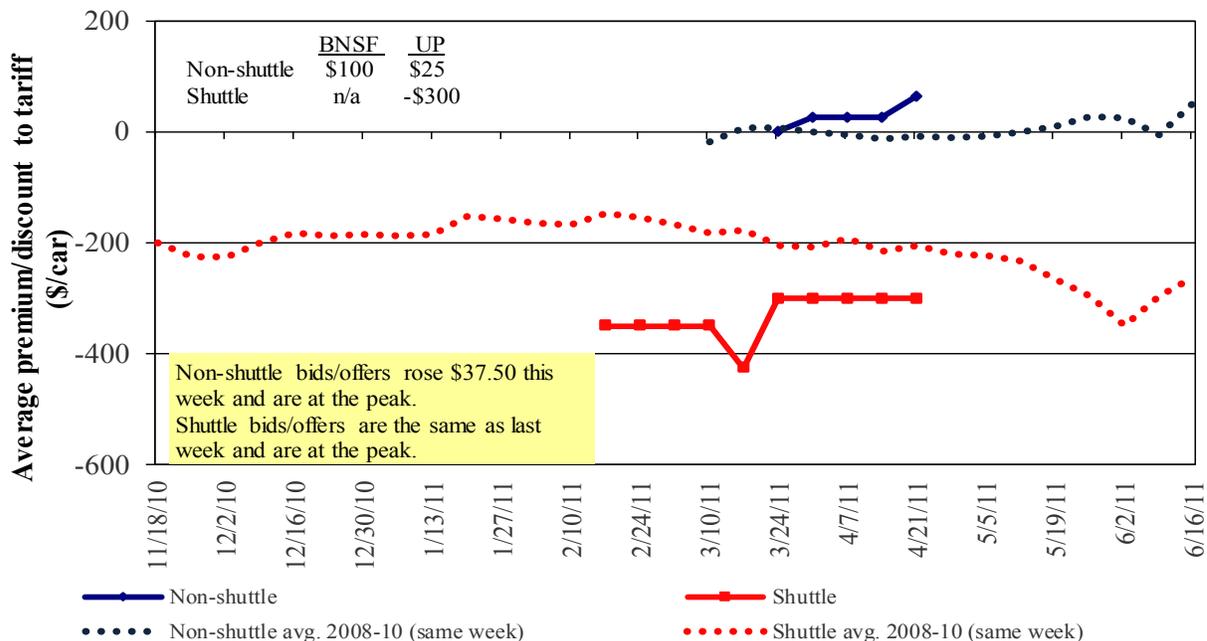


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in June 2011, Secondary Market**

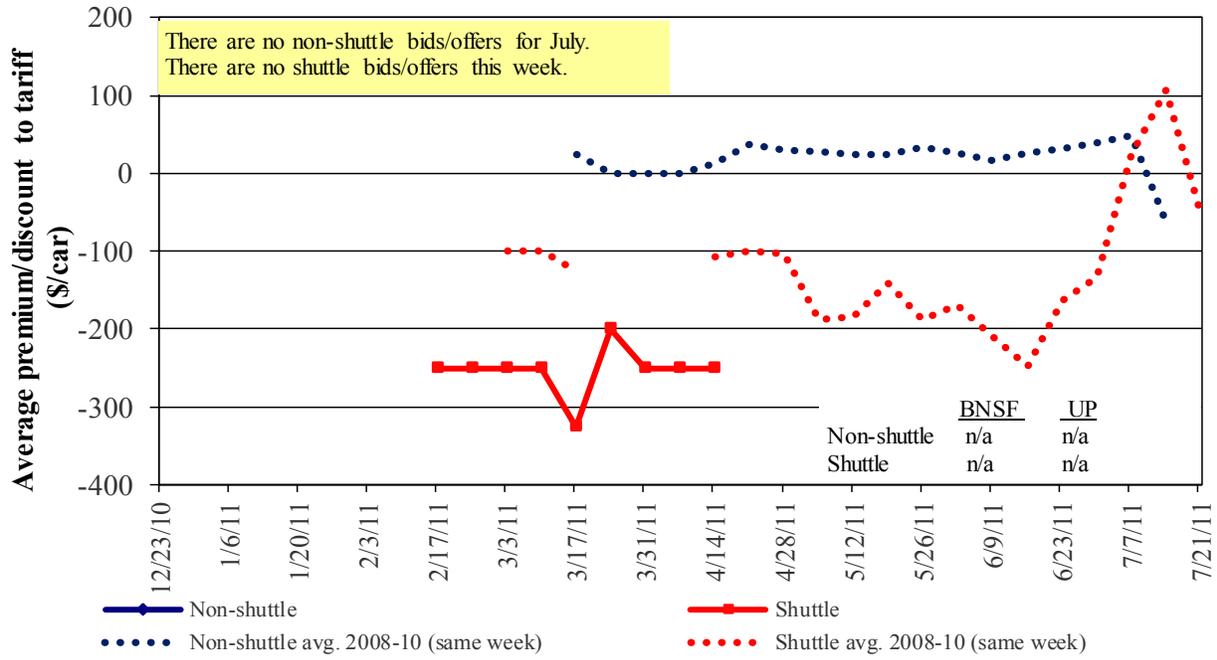


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in July 2011, 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 Rail Car Market (\$/car)<sup>1</sup>**

Week ending	Delivery period					
	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct-11
<b>4/21/2011</b>						
<b>Non-shuttle</b>						
BNSF-GF	58	100	n/a	n/a	n/a	n/a
Change from last week	(9)	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	67	108	n/a	n/a	n/a	n/a
UP-Pool	(13)	25	n/a	n/a	n/a	n/a
Change from last week	(30)	-	n/a	n/a	n/a	n/a
Change from same week 2010	-	38	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(333)	n/a	n/a	n/a	n/a	n/a
Change from last week	117	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(41)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(450)	(300)	n/a	(300)	(200)	650
Change from last week	-	-	n/a	(50)	-	(200)
Change from same week 2010	(350)	n/a	n/a	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from 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:						
4/4/2011	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:	
					metric ton	bushel <sup>2</sup>
<b>Unit train</b>						
Wheat	Wichita, KS	St. Louis, MO	\$2,883	\$152	\$30.14	\$0.82
	Grand Forks, ND	Duluth-Superior, MN	\$2,822	\$83	\$28.85	\$0.79
	Wichita, KS	Los Angeles, CA	\$5,710	\$428	\$60.96	\$1.66
	Wichita, KS	New Orleans, LA	\$3,384	\$267	\$36.26	\$0.99
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$352	\$57.22	\$1.56
	Northwest KS	Galveston-Houston, TX	\$3,651	\$293	\$39.16	\$1.07
	Amarillo, TX	Los Angeles, CA	\$3,850	\$407	\$42.28	\$1.15
Corn	Champaign-Urbana, IL	New Orleans, LA	\$2,812	\$302	\$30.92	\$0.84
	Toledo, OH	Raleigh, NC	\$3,760	\$346	\$40.78	\$1.11
	Des Moines, IA	Davenport, IA	\$1,843	\$64	\$18.94	\$0.52
	Indianapolis, IN	Atlanta, GA	\$3,196	\$260	\$34.32	\$0.93
	Indianapolis, IN	Knoxville, TN	\$2,760	\$167	\$29.06	\$0.79
	Des Moines, IA	Little Rock, AR	\$2,938	\$188	\$31.04	\$0.84
	Des Moines, IA	Los Angeles, CA	\$4,372	\$547	\$48.85	\$1.33
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,311	\$320	\$36.06	\$0.98
	Toledo, OH	Huntsville, AL	\$2,921	\$246	\$31.45	\$0.86
	Indianapolis, IN	Raleigh, NC	\$3,830	\$349	\$41.50	\$1.13
	Indianapolis, IN	Huntsville, AL	\$2,613	\$167	\$27.60	\$0.75
	Champaign-Urbana, IL	New Orleans, LA	\$3,156	\$302	\$34.34	\$0.93
<b>Shuttle Train</b>						
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$246	\$34.61	\$0.94
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$192	\$33.13	\$0.90
	Chicago, IL	Albany, NY	\$3,497	\$325	\$37.95	\$1.03
	Grand Forks, ND	Portland, OR	\$4,702	\$426	\$50.92	\$1.39
	Grand Forks, ND	Galveston-Houston, TX	\$5,648	\$443	\$60.49	\$1.65
Corn	Northwest KS	Portland, OR	\$4,619	\$480	\$50.63	\$1.38
	Minneapolis, MN	Portland, OR	\$4,680	\$518	\$51.62	\$1.40
	Sioux Falls, SD	Tacoma, WA	\$4,640	\$475	\$50.79	\$1.38
	Champaign-Urbana, IL	New Orleans, LA	\$2,677	\$302	\$29.58	\$0.81
	Lincoln, NE	Galveston-Houston, TX	\$3,190	\$277	\$34.43	\$0.94
	Des Moines, IA	Amarillo, TX	\$3,330	\$236	\$35.41	\$0.96
	Minneapolis, MN	Tacoma, WA	\$4,680	\$514	\$51.58	\$1.40
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,080	\$532	\$45.80	\$1.25
	Sioux Falls, SD	Tacoma, WA	\$4,840	\$475	\$52.78	\$1.44
	Minneapolis, MN	Portland, OR	\$4,830	\$518	\$53.11	\$1.45
	Fargo, ND	Tacoma, WA	\$4,730	\$422	\$51.16	\$1.39
	Council Bluffs, IA	New Orleans, LA	\$3,510	\$348	\$38.31	\$1.04
	Toledo, OH	Huntsville, AL	\$2,536	\$246	\$27.63	\$0.75
	Grand Island, NE	Portland, OR	\$4,520	\$491	\$49.76	\$1.35

<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**

Effective date: 4/4/2011				Fuel	Tariff plus surcharge per:		Percent
Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	surcharge per car <sup>2</sup>	metric ton <sup>3</sup>	bushel <sup>3</sup>	change Y/Y <sup>4</sup>
Wheat	MT	Chihuahua, CI	\$6,854	\$450	\$74.63	\$2.03	5
	OK	Cuautitlan, EM	\$6,191	\$480	\$68.16	\$1.85	7
	KS	Guadalajara, JA	\$6,825	\$737	\$77.27	\$2.10	8
	TX	Salinas Victoria, NL	\$3,237	\$193	\$35.04	\$0.95	4
Corn	IA	Guadalajara, JA	\$7,310	\$737	\$82.23	\$2.09	9
	SD	Penjamo, GJ	\$7,000	\$589	\$77.54	\$1.97	4
	NE	Queretaro, QA	\$6,495	\$627	\$72.77	\$1.85	8
	SD	Salinas Victoria, NL	\$5,290	\$448	\$58.63	\$1.49	10
	MO	Tlalnepantla, EM	\$5,669	\$611	\$64.17	\$1.63	9
	SD	Torreon, CU	\$6,060	\$493	\$66.96	\$1.70	8
Soybeans	MO	Bojay (Tula), HG	\$6,368	\$636	\$71.57	\$1.95	5
	NE	Guadalajara, JA	\$7,200	\$724	\$80.97	\$2.20	9
	IA	El Castillo, JA <sup>5</sup>	\$7,390	\$585	\$81.49	\$2.22	7
	KS	Torreon, CU	\$5,790	\$493	\$64.20	\$1.75	10
Sorghum	OK	Cuautitlan, EM	\$5,220	\$447	\$57.90	\$1.47	14
	TX	Guadalajara, JA	\$6,020	\$383	\$65.43	\$1.66	6
	NE	Penjamo, GJ	\$6,575	\$664	\$73.96	\$1.88	2
	KS	Queretaro, QA	\$5,895	\$429	\$64.61	\$1.64	10
	NE	Salinas Victoria, NL	\$4,725	\$406	\$52.43	\$1.33	10
	NE	Torreon, CU	\$5,710	\$528	\$63.73	\$1.62	8

<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

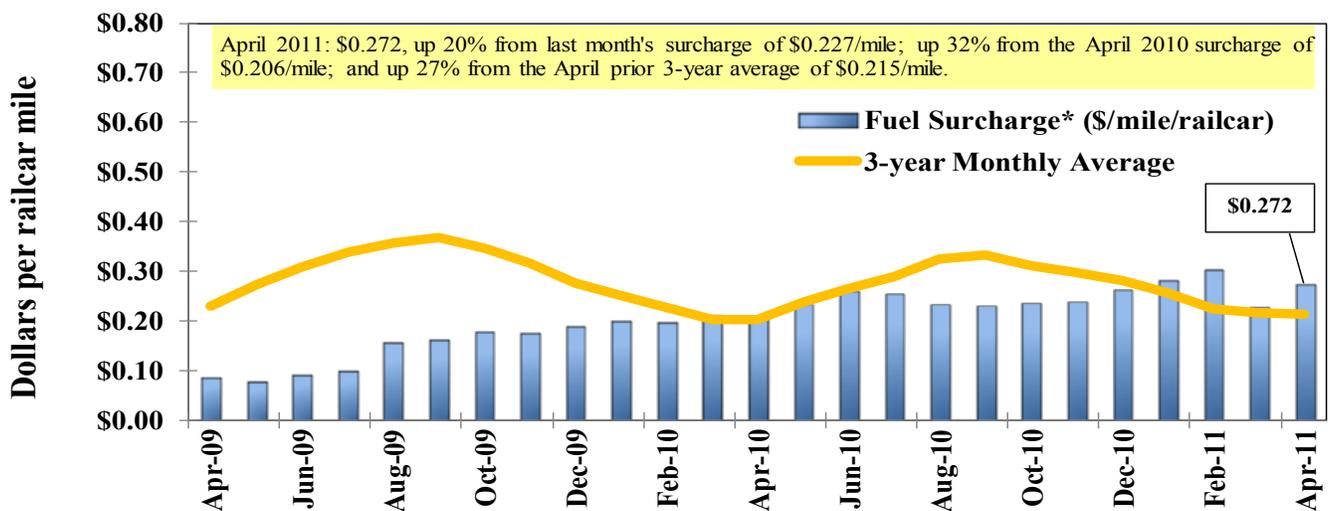
<sup>3</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<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.

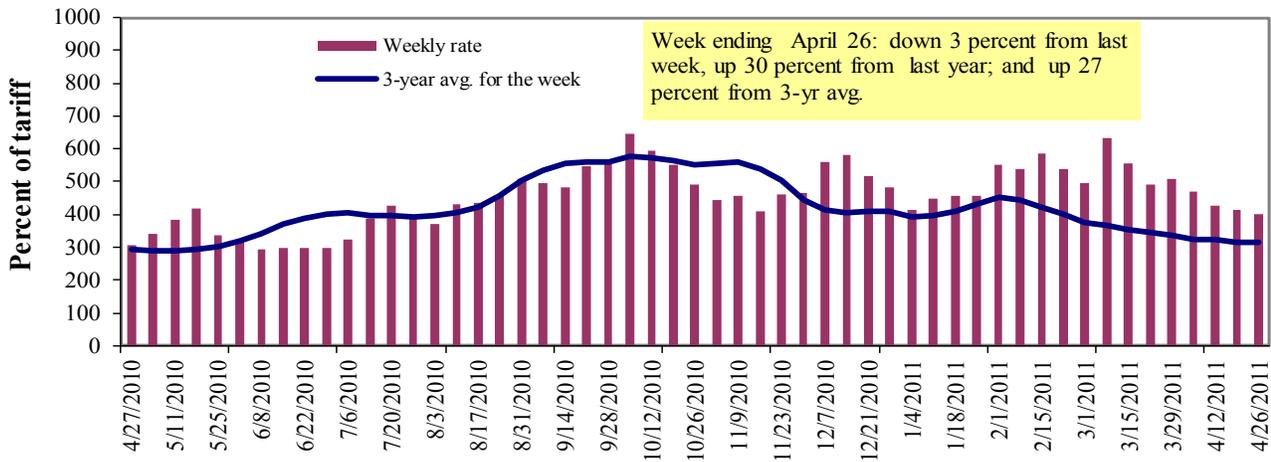
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

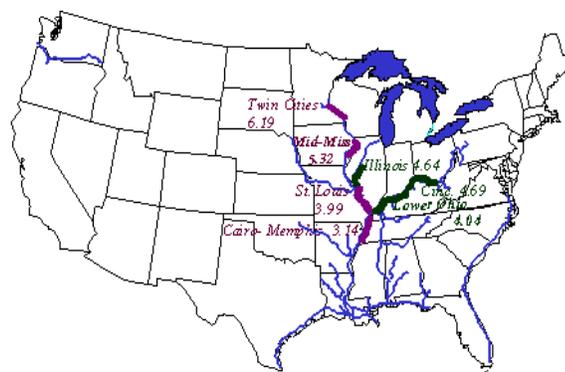
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	4/26/2011	-	-	402	300	-	-	-
	4/19/2011	-	-	413	300	412	417	265
<b>\$/ton</b>	4/26/2011	-	-	18.65	11.97	-	-	-
	4/19/2011	-	-	19.16	11.97	19.32	16.85	8.32
<b>Current week % change from the same week:</b>								
	Last year	-	-	30	51	-	-	-
	3-year avg. <sup>2</sup>	-	-	27	27	-	-	-
<b>Rate<sup>1</sup></b>	May	505	442	430	320	400	400	-
	July	533	470	453	362	400	400	-

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds; Missing rates due to flood conditions.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9  
Benchmark tariff rates



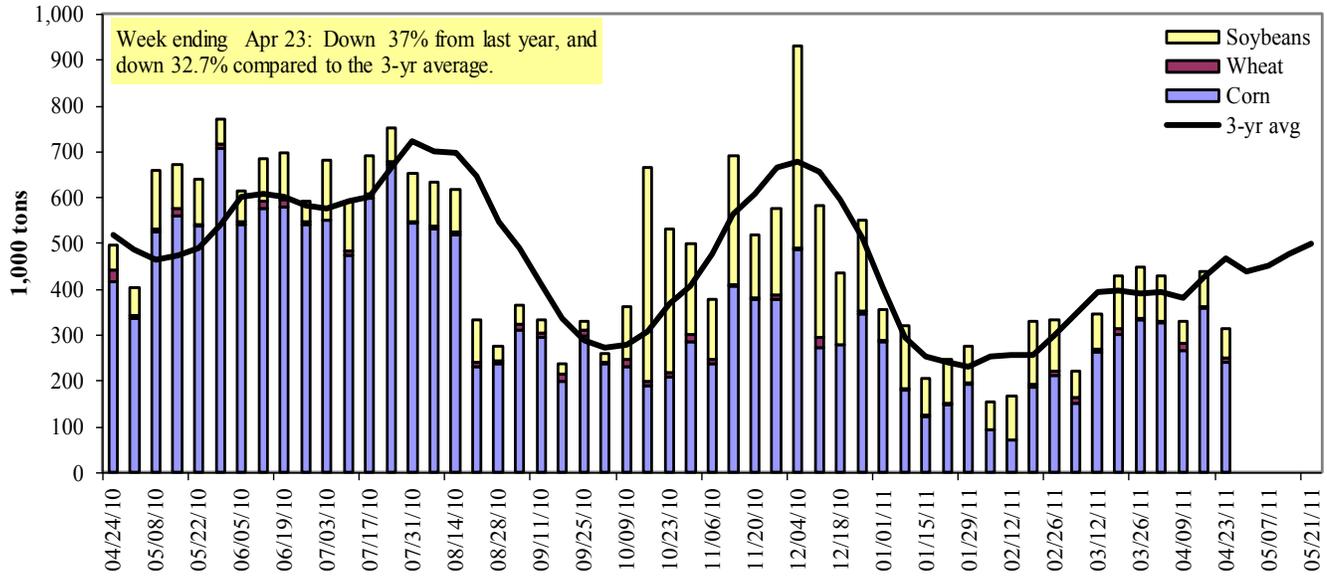
### Calculating barge rate per ton:

(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 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/mvrini/omni/webprts/default.asp)

Table 10

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

Week ending 4/23/2011	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	76	0	33	0	109
Alton, IL (L26)	238	10	60	0	308
Granite City, IL (L27)	241	10	63	2	317
<b>Illinois River (L8)</b>	152	3	19	0	174
<b>Ohio River (L52)</b>	83	16	9	0	108
<b>Arkansas River (L1)</b>	1	21	17	4	44
Weekly total - 2011	326	47	89	6	468
Weekly total - 2010	481	41	76	11	610
2011 YTD <sup>1</sup>	5,415	377	2,987	115	8,895
2010 YTD	5,752	321	3,081	137	9,291
2011 as % of 2010 YTD	94	117	97	84	96
Last 4 weeks as % of 2010 <sup>2</sup>	100	165	102	136	103
<b>Total 2010</b>	<b>22,768</b>	<b>1,220</b>	<b>10,373</b>	<b>481</b>	<b>34,841</b>

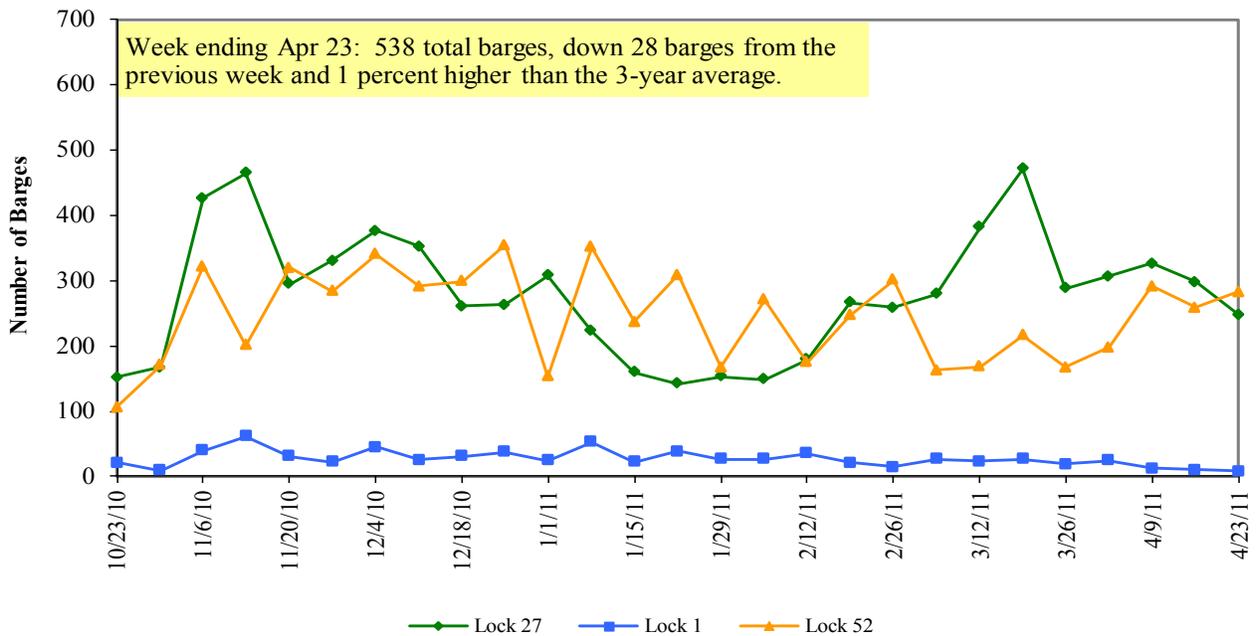
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

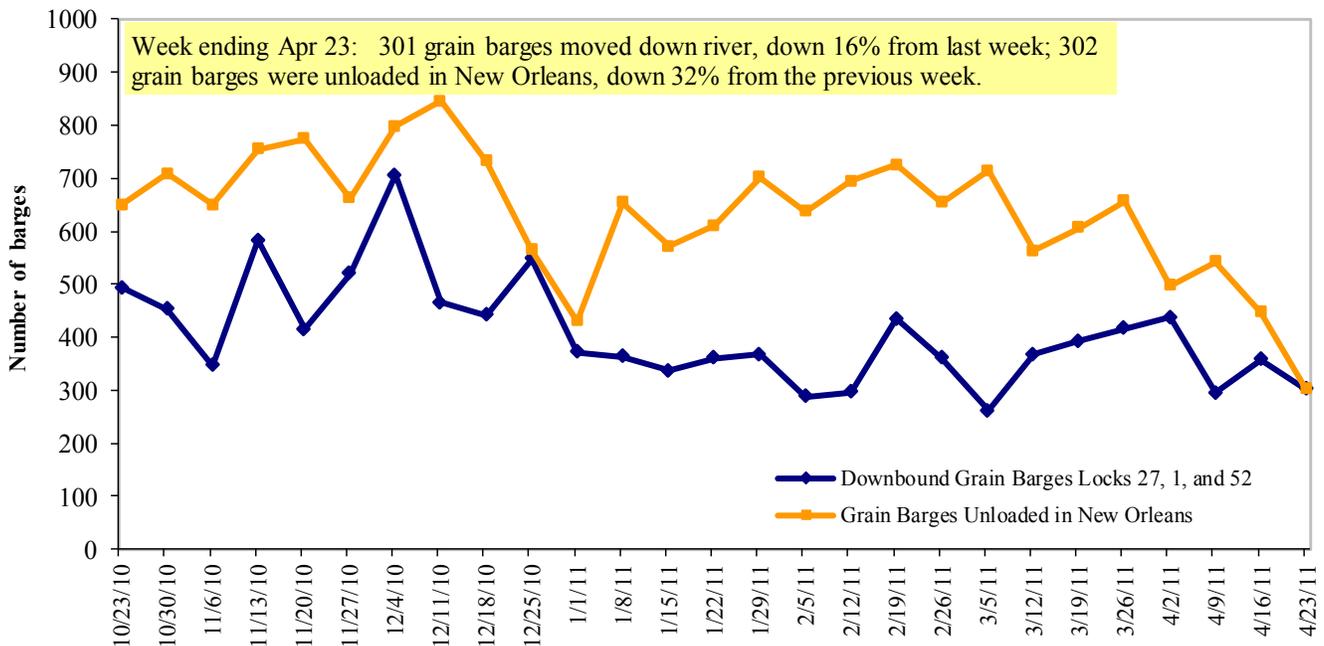
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrini/omni/webprts/default.asp)

**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 4/25/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.105	-0.006	1.030
	New England	4.222	0.010	1.117
	Central Atlantic	4.238	0.009	1.052
	Lower Atlantic	4.038	-0.013	1.013
II	Midwest <sup>2</sup>	4.061	-0.007	1.008
III	Gulf Coast <sup>3</sup>	4.024	-0.009	0.986
IV	Rocky Mountain	4.134	0.008	0.997
V	West Coast	4.305	-0.014	1.094
	California	4.438	-0.002	1.211
Total	U.S.	4.098	-0.007	1.020

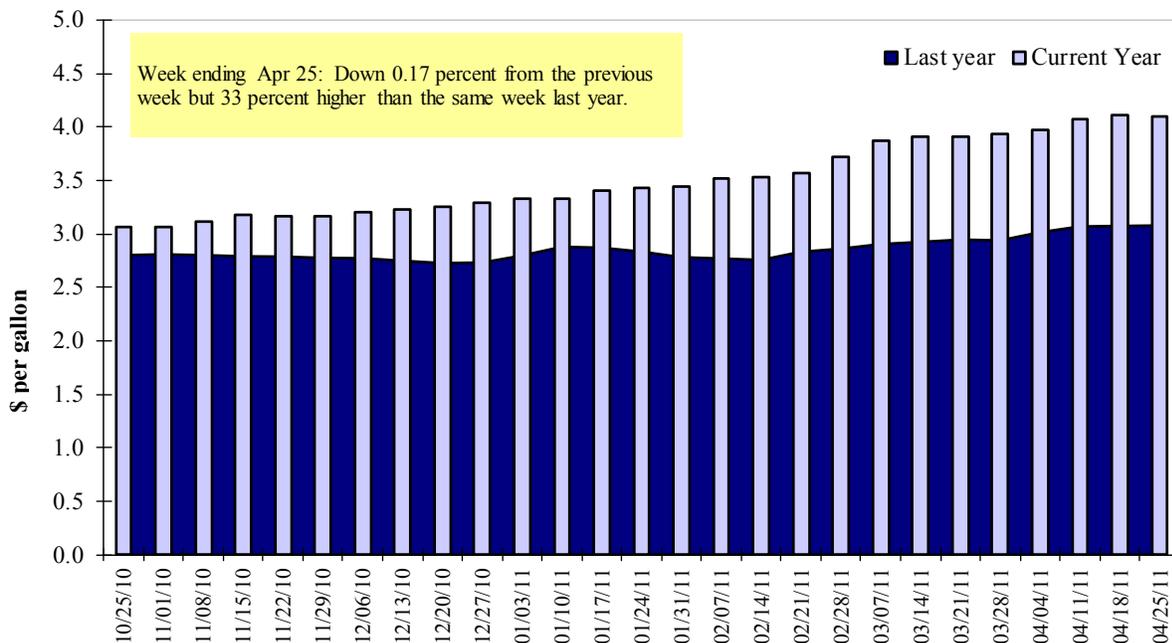
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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)

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>									
4/14/2011	2,966	541	1,822	1,233	69	6,631	12,889	5,048	24,568
This week year ago	1,006	331	865	475	118	2,794	10,028	2,057	14,879
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2010/11 YTD	13,516	2,284	7,176	3,933	879	27,789	27,485	35,874	91,148
2009/10 YTD	7,406	2,503	4,632	3,486	878	18,905	28,314	34,937	82,156
YTD 2010/11 as % of 2009/10	183	91	155	113	100	147	97	103	111
Last 4 wks as % of same period 2009/10	325	213	235	266	100	264	133	266	176
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385
2008/09 Total	11,244	5,100	5,408	3,420	454	25,626	44,650	33,705	103,981

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

<sup>2</sup> Shipped export sales to date; the new marketing year 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 04/14/11	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	12,131	10,807	12	14,343
Mexico	6,478	7,148	(9)	7,999
Korea	4,398	6,372	(31)	7,562
Taiwan	2,334	2,470	(6)	2,949
Egypt	2,437	1,634	49	2,935
<b>Top 5 importers</b>	<b>27,778</b>	<b>28,431</b>	<b>(2)</b>	<b>35,788</b>
<b>Total US corn export sales</b>	<b>40,374</b>	<b>38,342</b>	<b>5</b>	<b>50,460</b>
% of Projected	82%	76%		
Change from Last Week	613	1,481		
<b>Top 5 importers' share of U.S. corn export sales</b>	<b>69%</b>	<b>74%</b>		
<b>USDA forecast, April 2011</b>	<b>49,530</b>	<b>50,460</b>	<b>(2)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol April 2011</b>	<b>127,000</b>	<b>116,027</b>	<b>9</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 04/14/2011	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	25,153	21,716	16	22,454
Mexico	2,636	2,565	3	3,276
Japan	1,954	2,020	(3)	2,347
EU-25	2,599	2,664	(2)	2,647
Taiwan	1,227	1,339	(8)	1,556
<b>Top 5 importers</b>	<b>33,568</b>	<b>30,304</b>	<b>11</b>	<b>32,280</b>
<b>Total US soybean export sales</b>	<b>40,922</b>	<b>36,993</b>	<b>11</b>	<b>40,850</b>
% of Projected	95%	91%		
Change from last week	349	309		
<b>Top 5 importers' share of U.S. soybean export sales</b>	82%	82%		
<b>USDA forecast, April 2011</b>	<b>43,000</b>	<b>40,850</b>	<b>5</b>	
<b>Soybean Use for Biodiesel USDA forecast, April 2011</b>	<b>6,474</b>	<b>4,076</b>	<b>59</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 04/14/2011	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	3,590	3,357	7	3,233
Japan	3,533	3,136	13	3,148
Mexico	2,623	1,917	37	1,975
Philippines	1,875	1,562	20	1,518
Korea, South	1,645	1,176	40	1,111
Taiwan	944	844	12	844
Venezuela	631	680	(7)	658
Colombia	820	544	51	575
Peru	934	520	79	567
Egypt	3,938	456	764	529
<b>Top 10 importers</b>	<b>20,533</b>	<b>14,190</b>	<b>45</b>	<b>14,156</b>
<b>Total US wheat export sales</b>	<b>34,420</b>	<b>21,699</b>	<b>59</b>	<b>23,980</b>
% of Projected	99%	90%		
Change from last week	135	166		
<b>Top 10 importers' share of U.S. wheat export sales</b>	60%	65%		
<b>USDA forecast, April 2011</b>	<b>34,700</b>	<b>23,980</b>	<b>45</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 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 04/21/11	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	425	338	126	4,238	2,768	153	152	144	11,062
Corn	203	244	83	2,556	2,397	107	106	94	9,950
Soybeans	130	132	99	2,933	3,865	76	79	78	10,191
<b>Total</b>	<b>758</b>	<b>713</b>	<b>106</b>	<b>9,727</b>	<b>9,031</b>	<b>108</b>	<b>113</b>	<b>106</b>	<b>31,203</b>
<b>Mississippi Gulf</b>									
Wheat	60	181	33	1,782	1,058	168	152	161	4,199
Corn	541	516	105	8,422	7,800	108	100	92	29,794
Soybeans	65	210	31	8,846	7,604	116	184	131	22,519
<b>Total</b>	<b>666</b>	<b>908</b>	<b>73</b>	<b>19,049</b>	<b>16,462</b>	<b>116</b>	<b>120</b>	<b>107</b>	<b>56,512</b>
<b>Texas Gulf</b>									
Wheat	194	343	57	4,687	2,313	203	264	212	9,339
Corn	28	20	137	444	630	70	45	69	1,859
Soybeans	0	0	n/a	760	647	118	0	0	1,916
<b>Total</b>	<b>222</b>	<b>363</b>	<b>61</b>	<b>5,892</b>	<b>3,591</b>	<b>164</b>	<b>197</b>	<b>186</b>	<b>13,115</b>
<b>Great Lakes</b>									
Wheat	55	70	78	166	68	245	113	145	1,897
Corn	0	0	n/a	0	0	n/a	0	0	119
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	655
<b>Total</b>	<b>55</b>	<b>70</b>	<b>78</b>	<b>166</b>	<b>68</b>	<b>245</b>	<b>101</b>	<b>128</b>	<b>2,672</b>
<b>Atlantic</b>									
Wheat	0	60	0	406	96	424	268	235	343
Corn	9	0	n/a	98	108	90	86	92	469
Soybeans	0	6	0	367	650	56	85	106	1,417
<b>Total</b>	<b>9</b>	<b>66</b>	<b>14</b>	<b>871</b>	<b>855</b>	<b>102</b>	<b>155</b>	<b>162</b>	<b>2,229</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	734	991	74	11,280	6,304	179	182	171	26,839
Corn	780	780	100	11,519	10,936	105	97	92	42,192
Soybeans	195	349	56	12,906	12,766	101	122	105	36,699
<b>Total</b>	<b>1,709</b>	<b>2,120</b>	<b>81</b>	<b>35,706</b>	<b>30,006</b>	<b>119</b>	<b>126</b>	<b>116</b>	<b>105,730</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

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

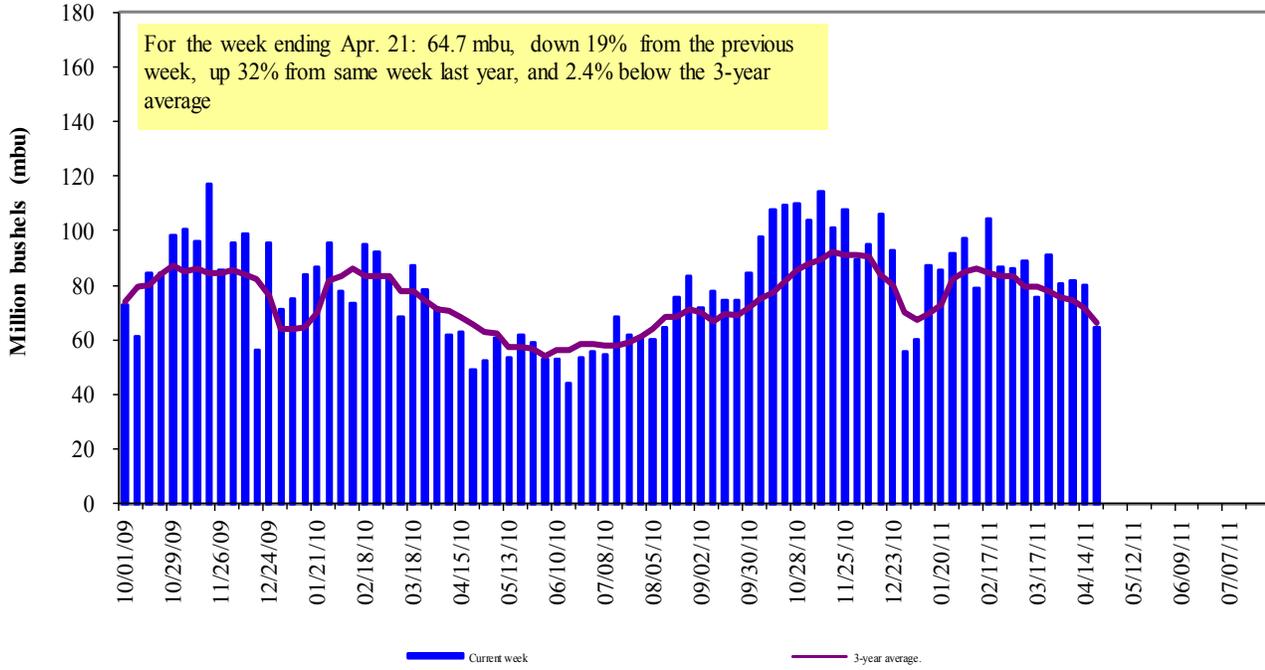
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The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

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Figure 14

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

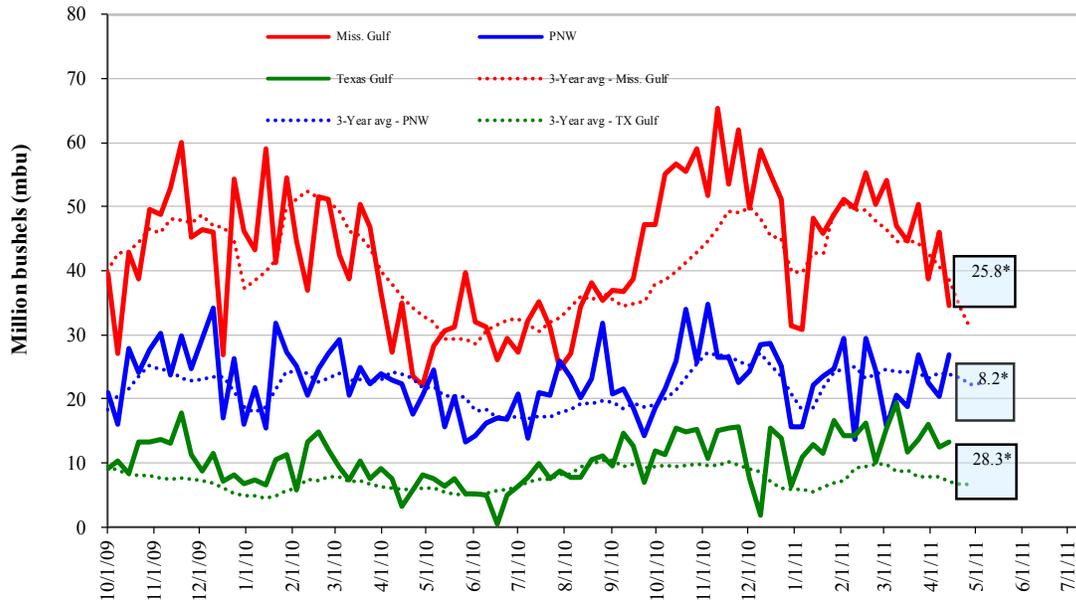


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

<u>Apr. 21 % change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 26	down 39	down 29	up 6
Last year (same week)	down 10	up 40	up 16	up 62
3-yr avg. (4-wk mov. avg.)	down 24	up 21	down 17	up 39

# Ocean Transportation

Table 17

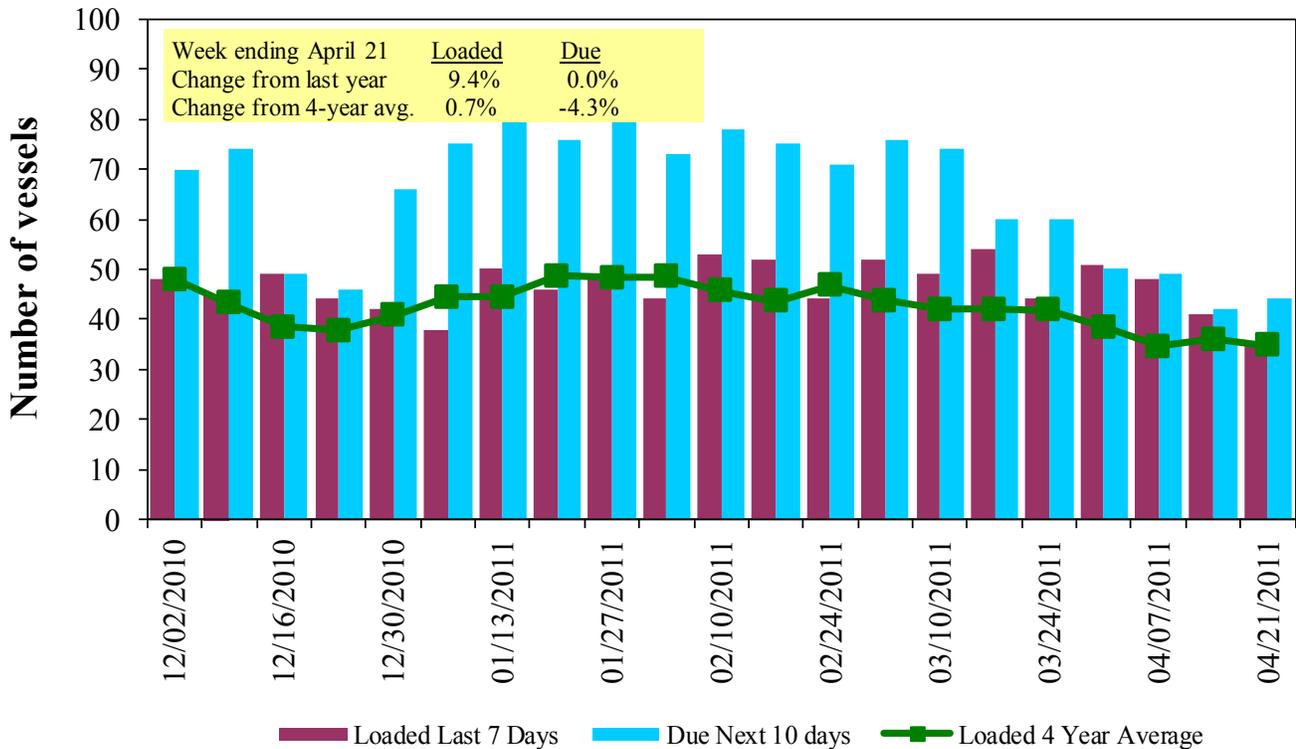
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/21/2011	28	35	44	22	14
4/14/2011	28	41	42	25	17
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**

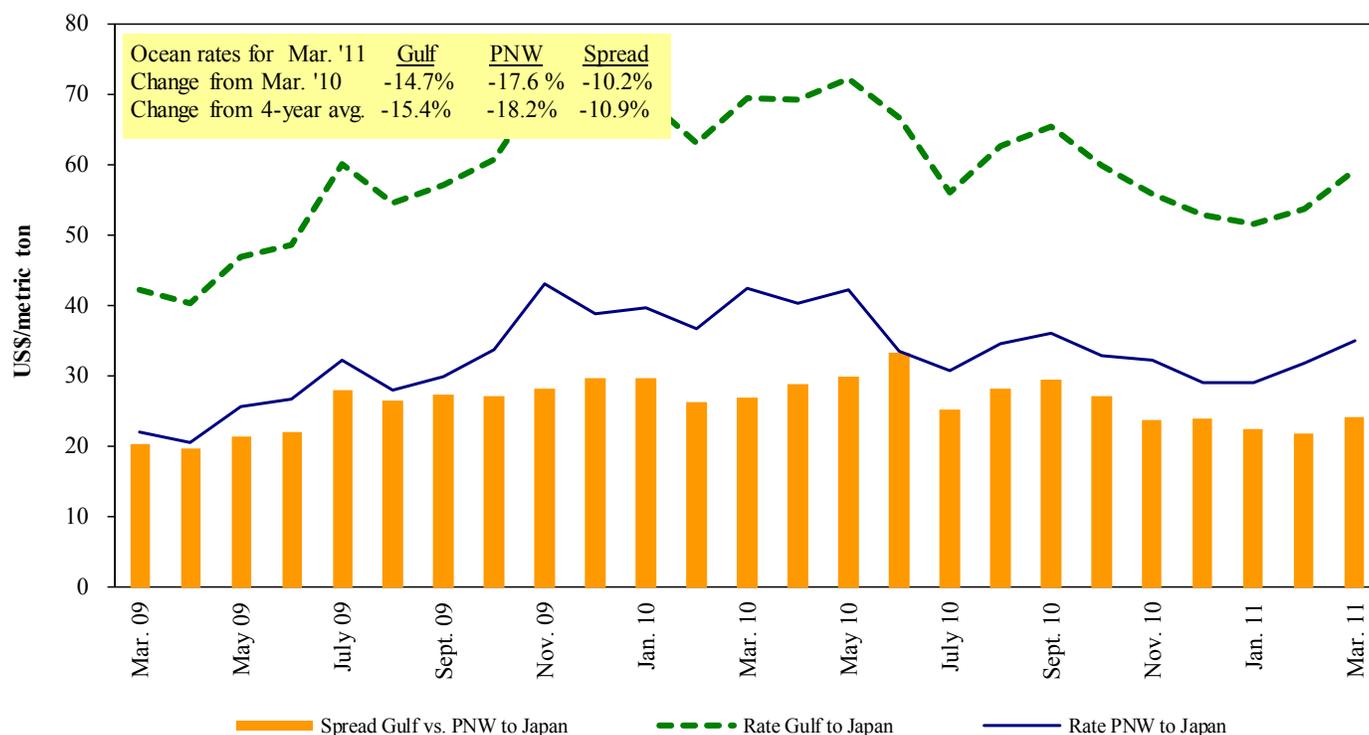


Source: Transportation & Marketing Programs/AMS/USDA

<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 4/23/2011

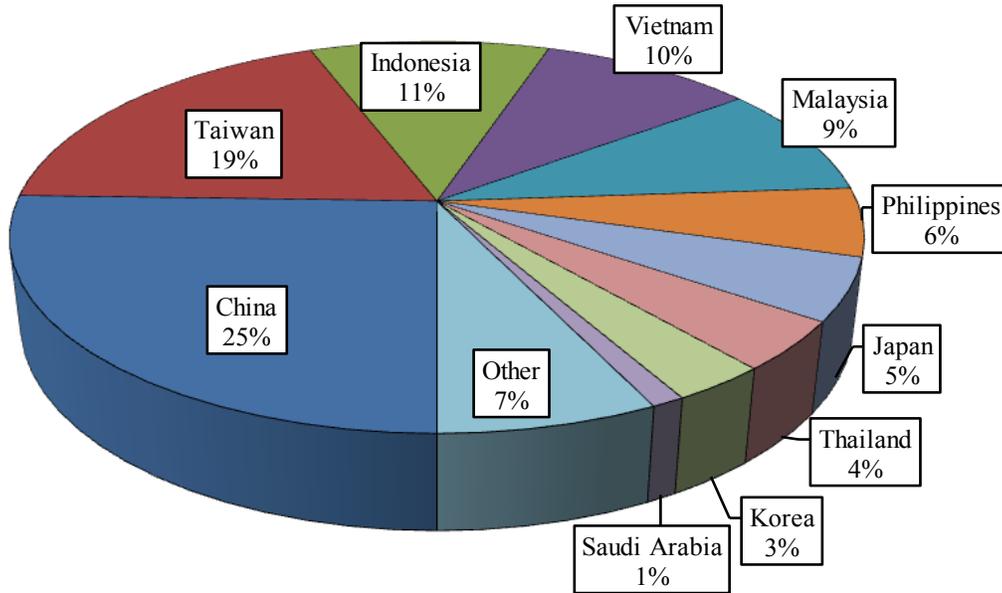
Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	May 1/10	55,000	56.00
U.S. Gulf	China	Heavy Grain	Mar 20/29	52,000	52.00
U.S. Gulf	China	Heavy Grain	Mar 8/15	55,000	53.60
U.S. Gulf	China	Heavy Grain	Feb 1/28	58,000	48.00
U.S. Gulf	China	Heavy Grain	Dec 22/31	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 20/30	55,000	57.00
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	63.00
U.S. Gulf	Egypt	Grain	May 1/10	60,000	28.50
U.S. Gulf	Isreal	Wheat	May 20/30	50,000	36.00
U.S. Gulf	Nicaragua	Corn/Soybean meal	Feb 7/17	24,000	56.42
U.S. Gulf	Nigeria	Wheat	Apr 17/23	25,000	46.50
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Mar 31/Apr 9	17,260	129.95
U.S. Gulf	Turkey	Heavy Grain	Jan 25/30	2,500	46.00
PNW	Pakistan	Heavy Grain	Jan 15/25	42,000	46.00
PNW	Rotterdam	Heavy Grain	Feb 15/25	55,000	26.00
Brazil	China	Heavy Grain	April 5/15	60,000	51.00
Brazil	China	Heavy Grain	April 1/15	55,000	47.00
River Plate	Algeria	Corn	Apr 15/25	25,000	41.50
River Plate	Algeria	Corn	April 15/25	30,000	41.50
River Plate	Morocco	corn	Feb 28/Mar 8	25,000	37.25
River Plate	Morocco	Heavy Grain	Apr 25/28	2,500	44.50
River Plate	Spain	Corn	Apr 24/25	2,500	46.00
Uruguay	Algeria	Wheat	Feb 5/10	25,000	46.00

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

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, January 2011**

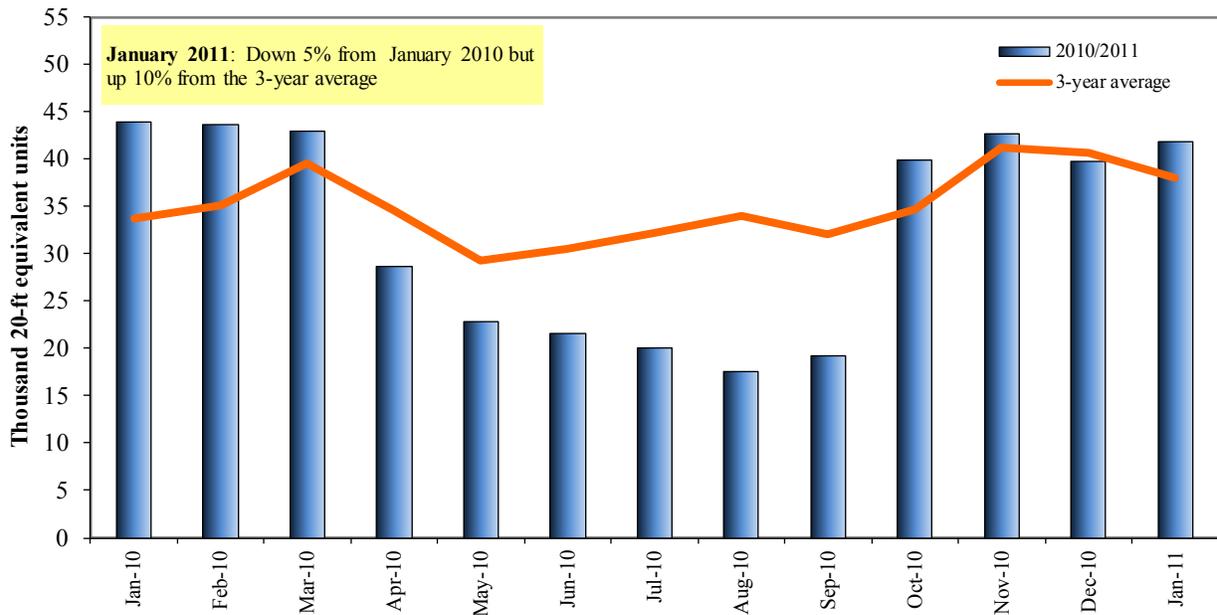


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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