



WEEKLY HIGHLIGHTS

May 12, 2011

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Midwest Flood Update

Wednesday sparked the beginning of another round of severe weather over the Central and Midwest regions. The storm system moved over Kansas, Oklahoma, and Texas Wednesday, and then continued east on Thursday and into Friday over the flooded Mississippi and Ohio River Valleys. The flood waters moved past Memphis, TN, earlier this week. The next major community on the Mississippi River to be affected is Helena, AR. Record flood levels are still expected in Greenville, Vicksburg, and Natchez, MS next week. Coast Guard restrictions on barge traffic on the Lower Mississippi River remain in place. Rail delays of 12–36 hours continue as railroads reroute traffic around the flooded regions in affected States between North Dakota and Mississippi. According to the Oil Price Information Service (OPIS), limited barge traffic has caused supply disruptions at oil terminals that rely on waterborne shipments from across the Midwest and Gulf Coast. Supply disruptions could put additional pressure on retail gasoline prices.

USDA Projects Lower Grain Exports in 2011/12

In its May 11 World Agricultural Supply Demand Estimates ([WASDE](#)) report, USDA projected wheat, corn, and soybean total exports in the coming marketing year to be 345 million bushels (mbu) lower than the 2010/11 estimate. U.S. wheat exports, at 1.05 mbu, are projected to be 225 mbu lower than in 2010/11 because of lower U.S. wheat production and increasing Black Sea wheat production and exports. Corn exports (1.8 mbu) are projected to be 100 mbu lower due to larger foreign corn supplies. Soybean exports (1.54 mbu) are projected to be 10 mbu lower than the previous year because of lower U.S. soybean supplies and higher South American soybean supplies. Because rail is the primary mode for shipping wheat to export ports, significantly lower wheat exports would have the greatest impact on rail grain movements as the wheat harvest progresses this spring and summer.

Corn Plantings Advance, but Lag Significantly in the Northern Plains

For the week ending May 8, U.S. farmers have planted 40 percent of the corn crop, up 27 percentage points from the previous week but 19 points lower than average. The corn producing States of the Northern Plains lag significantly despite the planting intentions report that showed corn farmers planning to seed 22 percent more corn in North Dakota and 19 percent more corn in South Dakota than last year. Corn planting increased by 3 percentage points in North Dakota, where up to last week, no corn had been planted and is far lower than the normal 35 percent planted. South Dakota's corn planting increased by 15 percentage points but remains 16 percentage points lower than average. Eastern corn belt States are also lagging in corn planting pace. A shorter growing season may reduce yields and the size of the fall harvest.

Corn and Wheat Boost Texas Gulf Grain Inspections

For the week ending May 5, total inspections of grain (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.66 million metric tons (mmt), down 10.4 percent from the previous week but 4.3 percent above last year this time. Despite the drop in total inspections of grain, Texas Gulf total grain inspections remained strong at .439 mmt—10 percent above the past week and 11 percent above last year at this time. Texas Gulf corn inspections (.044 mmt) were the highest since March 24 (.075 mmt), with increased shipments of corn to Mexico. Wheat inspections in the Texas Gulf (.392 mmt) were 17 percent above the 4-week running average.

**Snapshots by Sector**

**Rail**

U.S. railroads originated 23,968 **carloads of grain** during the week ending April 30, down 1 percent from last week, up 8 percent from last year, and 14 percent higher than the 3-year average.

During the week ending May 5, average May **non-shuttle secondary railcar bids/offers** were \$8.50 above tariff, down 50 cents from last week. Average shuttle rates were \$322 below tariff, up \$140.50 from last week.

**Ocean**

During the week ending May 5, 32 **ocean-going grain vessels** were loaded in the Gulf, up 3 percent from last year. Forty-five vessels are expected to be loaded in the U.S. Gulf within the next 10 days, down 14 percent from the same period last year.

During the week ending May 6, the cost of shipping grain from the Gulf to Japan averaged \$53 per mt, up 4 percent from the previous week. The rate from the Pacific Northwest to Japan was \$30 per mt, unchanged from the previous week.

**Barge**

During the week ending May 7, **barge grain movements** totaled 288,422 tons, 12 percent higher than the previous week and 66 percent lower than the same period last year.

During the week ending May 7, 184 grain barges **moved down river**, up 14 percent from last week; 340 grain barges were **unloaded in New Orleans**, down 13 percent from the previous week.

**Fuel**

During the week ending May 9, U.S. average **diesel fuel prices** decreased 2 cent per gallon to \$4.10—down 0.5 percent from the previous week and 31 percent higher than the same week last year.

# Feature Article/Calendar

## The Mississippi River and Tributaries Project is Vital to Grain Transportation

During 2011, most of the Mississippi River and its tributaries have experienced high water. This week, major flooding is occurring on the lower Mississippi River, and is expected to continue through the rest of the month. This article describes the Mississippi River and Tributaries Project (MRTP), a vital component of the transportation system that is used to deliver a majority of U.S. grain to export facilities in the New Orleans area (see table below).

Grain Shipments by barge to New Orleans				
	Corn	Soybeans	Wheat	Total
MS River barged grain as percent of total U.S. grain exports	55%	47%	14%	42%
MS River barged grain as percent of New Orleans grain exports	91%	88%	76%	88%
2010 estimated value of New Orleans exports arriving by barge	\$5.1	\$8.7	\$0.8	\$14.6

Note: Barge and export volumes based on average from 2005-2009; Sources - U.S. Army Corps of Engineers, USDA-FAS

Mississippi River barges supplied 42 percent of all U.S. grain exports during 2005–2009. The New Orleans area receives about 88 percent of its export grain by barge. In 2010, an estimated \$14.6 billion of corn, soybeans, and wheat were delivered by barge to the New Orleans area. Barges on the Mississippi River

supply about 55 percent of all corn exports, 47 percent of all soybean exports, and 14 percent of all wheat exports.



The MRTP (shaded pink on the map) is managed by the U.S. Army Corps of Engineers (Corps) and is largest flood control project in the world, providing protection to the lower Mississippi River Valley. See <http://www.mvn.usace.army.mil/pao/bro/misstrjb.htm>.

The project is designed to protect about 35,000 square miles bordering the river, which would be overflowed during times of high water if it were not for man-made structures. This valley begins just below Cape Girardeau, MO; it is roughly 600 miles in length, varies in width from 25 to 125 miles, and includes parts of seven States—Missouri, Illinois, Tennessee, Kentucky, Arkansas, Mississippi, and Louisiana.

The four major elements of the MRTP are:

- **Levees**—Contain flood flows
- **Floodways or Spillways**—Allow the passage of excess flows past critical reaches of the Mississippi River
- **Channel Improvement and Stabilization**—Stabilize the channel to provide efficient navigation alignment, increase the flood-carrying capacity of the river, and protect the levee system
- **Tributary Basin Improvements**—Major drainage and flood control, such as dams and reservoirs, pumping plants, and auxiliary channels.

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The main stem levee system, comprised of levees, floodwalls, and various control structures, is 2,203 miles long. Approximately 1,607 miles lie along the Mississippi River itself and 596 miles lie along the south banks of the Arkansas and Red rivers.

Recent activity on the lower Mississippi River involves the use of floodways to reduce the water levels at critical levees. The use of floodways centers on the premise that parts of the system may be stressed beyond design capabilities and water must be diverted away from these structures to prevent catastrophic losses to lives and livelihoods. In doing so, the overall effect is to reduce the water levels as the surge descends the system.

On May 2, the Corps began the operation of the Birds Point-New Madrid Floodway, located near the confluence of the Ohio and Mississippi rivers. Breaching the levee at Birds Point allowed water to run onto 133,000 acres of farmland designated as floodway, but protected 2.4 million acres downriver from being inundated. Flood waters were diverted to reduce water levels at the levees at Cairo, IL. Flood water reentered the Mississippi River near New Madrid, MO. According to Corps officials, operation of the floodway is not intended to stop all flooding, rather it is to relieve pressure on the Mississippi River and tributaries so as to reduce the risk of levee failures to communities behind those levees. In 1928, the Federal Government approved the federal acquisition of flowage rights—a one-time indemnity paid landowners to flood their land during the operation of the Birds Point-New Madrid Floodway. The floodway was only used once before, in 1937.

On May 9, the Corps opened the first floodgates at the Bonnet Carre Spillway upriver from New Orleans, LA. Officials estimate that the Bonnet Carre Spillway could be open for 2–4 weeks to help more quickly drain flood waters away from the New Orleans region. Water diverted by the Bonnet Carre will help limit water levels near barge and vessel operations.

The Corps is also making plans to open the Morganza Spillway north of Baton Rouge. Opening the Morganza Spillway would flood farmland and could disrupt vessel traffic along the Gulf Intracoastal Waterway (GIWW) west of New Orleans. Although the disruptions to the GIWW may have little impact on export grain movements, it will probably slow other barge operations near both spillways on the Mississippi River until river levels are back to normal. If the Morganza Spillway is opened, it will be the first time that all three flood control facilities were used during the same flood event. The amount of water diverted by the Morganza Spillway would be significantly more than that by the Bonnet Carre, and could make marine activities between Baton Rouge and the Gulf of Mexico less hazardous.

With sporadic river shut-downs and traffic restrictions, barge movements have been adversely impacted by the unprecedented flooding. Over the past several weeks, grain barge movements have been more than 20 percent below average and the number of grain barges unloaded in New Orleans has been 14 percent below average (Figure 12). However, the railroads have absorbed some of the excess grain movements. Total rail grain carloads for the country have been well above the 3-year average since mid-March when high water levels on the Mississippi River began. Year-to-date grain rail deliveries to port have been above average for all major port regions, but deliveries to the Mississippi Gulf are 161 percent higher than during the same time last year, reflecting the shift from barge to rail grain movements.

The consequences of flooding can be a challenge to navigation during and after a major event. Stabilization and protection of the riverbanks are important to flood control and navigation. The Coast Guard has advised barge operators to moor all vessels properly in order to prevent breakaways during this unprecedented high water season. [Nick.Marathon@ams.usda.gov](mailto:Nick.Marathon@ams.usda.gov)

# Grain Transportation Indicators

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

Week ending	Truck	Rail <sup>2</sup>	Barge	Ocean	
				Gulf	Pacific
05/11/11	275	104	236	237	213
05/04/11	277	104	256	228	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)**

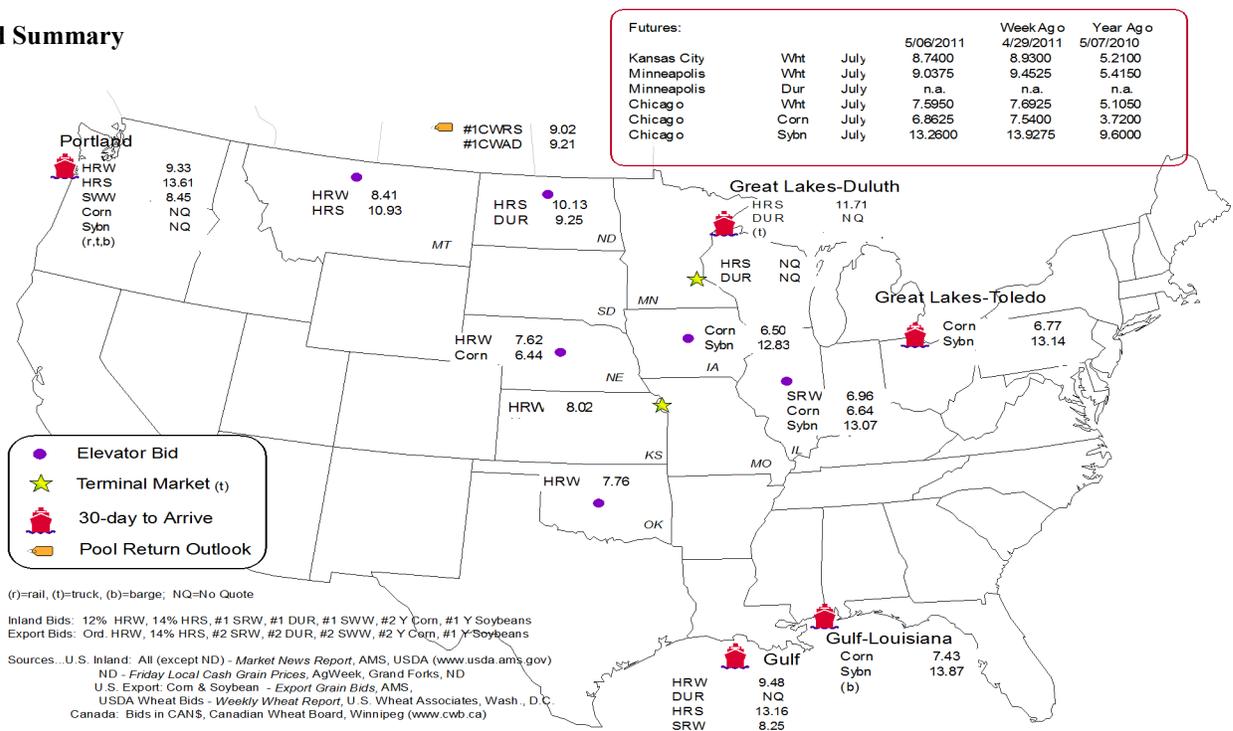
Commodity	Origin--Destination	5/6/2011	4/29/2011
Corn	IL--Gulf	-0.79	-0.80
Corn	NE--Gulf	-0.99	-1.02
Soybean	IA--Gulf	-1.04	-1.14
HRW	KS--Gulf	-1.46	-1.62
HRS	ND--Portland	-3.48	-3.57

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	
5/04/2011 <sup>P</sup>	404	2,508	1,079	3,216	391	7,598
4/27/2011 <sup>r</sup>	482	2,492	1,188	3,936	626	8,724
2011 YTD	17,748	41,981	15,141	71,228	12,599	158,697
2010 YTD	6,813	26,599	16,586	61,364	16,009	127,371
2011 YTD as % of 2010 YTD	261	158	91	116	79	125
Last 4 weeks as % of 2010 <sup>2</sup>	290	230	110	115	145	141
Last 4 weeks as % of 4-year avg. <sup>2</sup>	82	178	137	88	112	111
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.

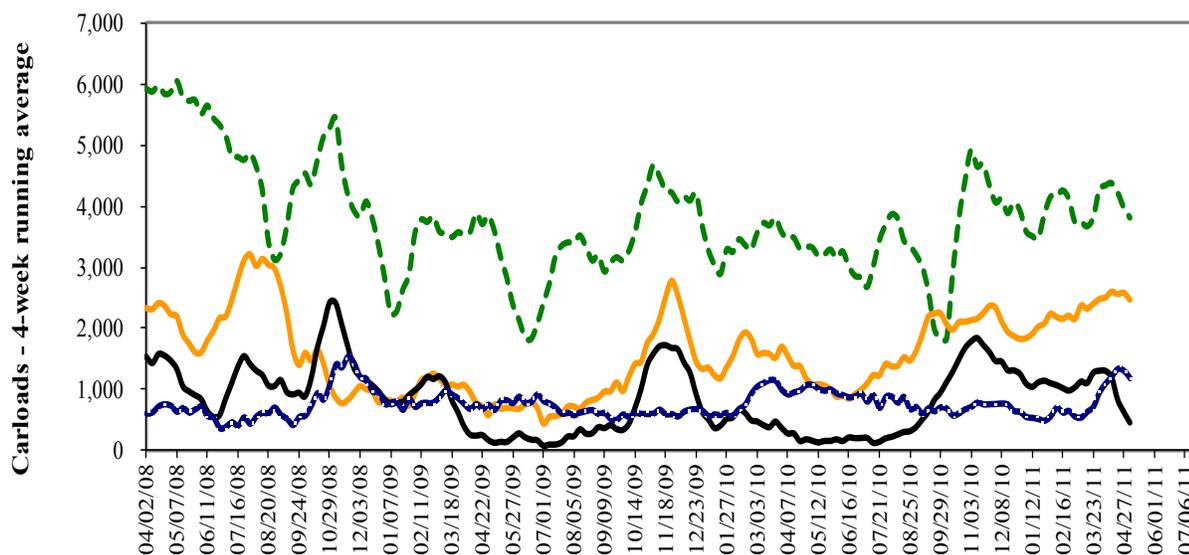
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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: 4 wks. ending 5/4--up 15% from same period last year; down 12% from 4-year average  
— Texas Gulf: 4 wks. ending 5/4-- up 130% from same period last year; up 78% from 4-year average  
— Miss. River: 4 wks. Ending 5/4 -- up 190% from same period last year; down 18% from 4-year average  
- - - Cross-border Mexico: 4 wks. ending 5/4 -- up 10% from same period last year; up 37% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

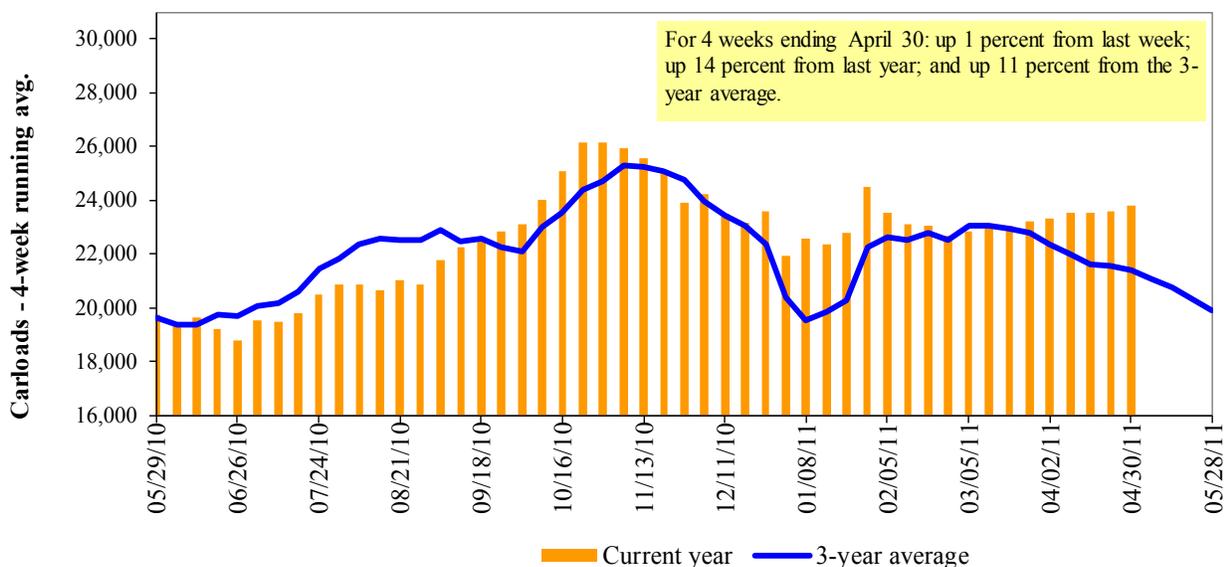
Table 4

**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
04/30/11	1,871	3,194	13,075	529	5,299	23,968	4,338	6,129
This week last year	2,613	3,149	10,592	698	5,240	22,292	4,016	5,754
2011 YTD	36,496	51,147	196,446	10,398	105,452	399,939	69,007	79,640
2010 YTD	39,261	51,980	181,264	12,954	93,010	378,469	69,266	92,171
2011 YTD as % of 2010 YTD	93	98	108	80	113	106	100	86
Last 4 weeks as % of 2010 <sup>1</sup>	98	98	121	94	118	114	109	83
Last 4 weeks as % of 3-yr avg.	84	103	122	96	112	112	104	89
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
5/4/2011								
BNSF <sup>3</sup>								
COT grain units	200	0	200	no bids	no bids	0	no offer	0
COT grain single-car <sup>5</sup>	2 . . 15	0 . . 26	0 . . 50	0 . . 7	2 . . 63	0 . . 7	no offer	0 . . 7
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.

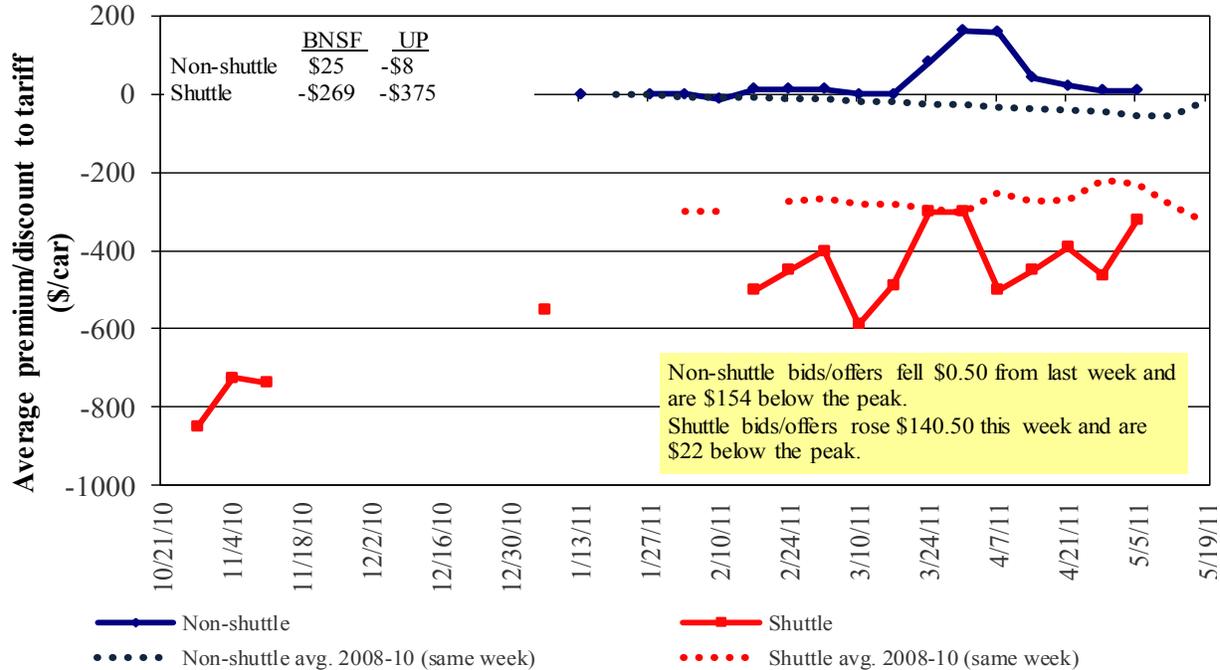
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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**

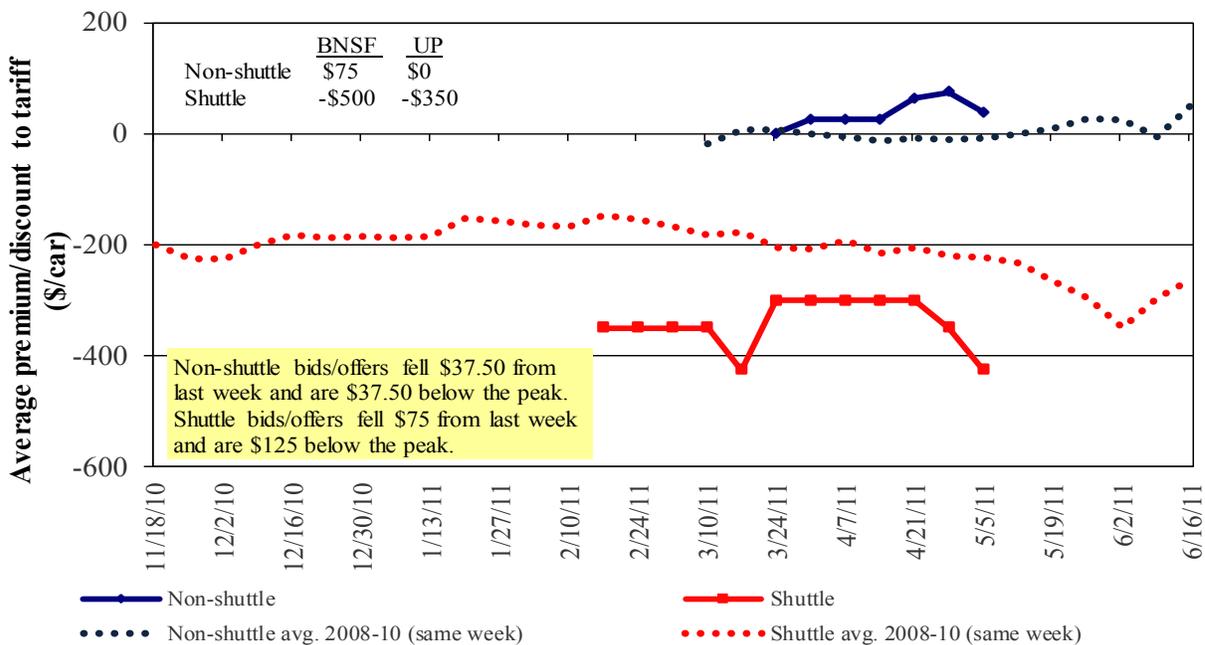


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

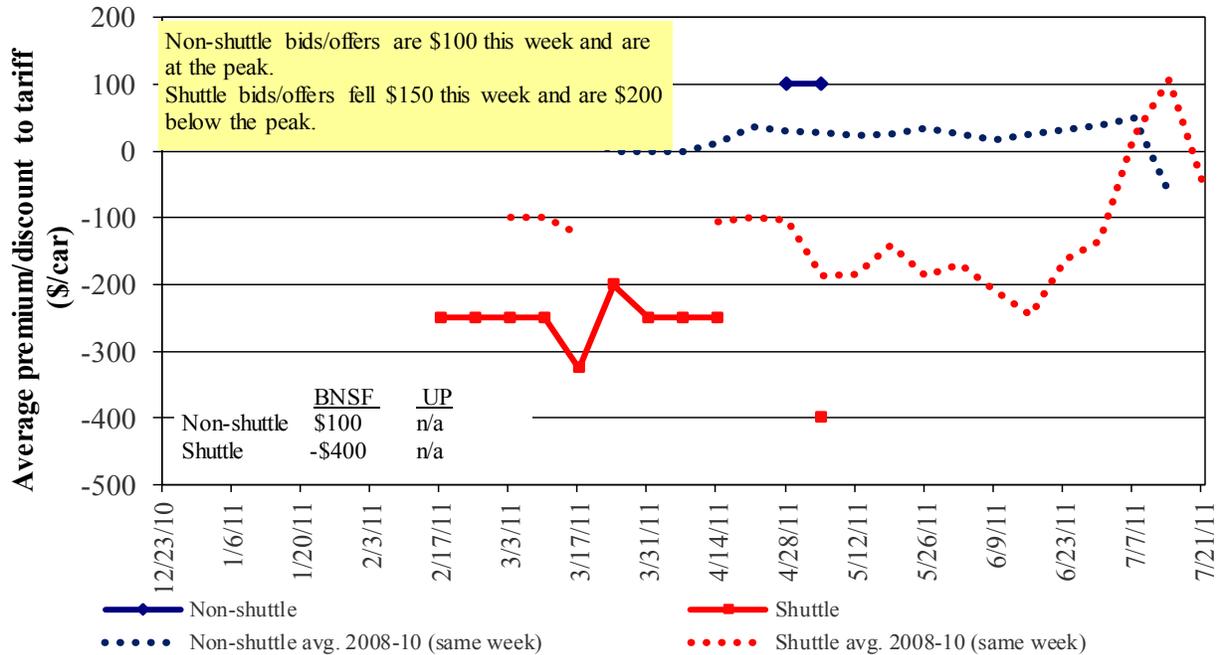


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

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>5/4/2011</b>						
<b>Non-shuttle</b>						
BNSF-GF	25	75	100	n/a	n/a	n/a
Change from last week	(6)	-	-	n/a	n/a	n/a
Change from same week 2010	25	85	n/a	n/a	n/a	n/a
UP-Pool	(8)	-	n/a	n/a	n/a	n/a
Change from last week	5	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	2	8	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(269)	(500)	(400)	n/a	n/a	n/a
Change from last week	206	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	81	(300)	n/a	n/a	n/a	n/a
UP-Pool	(375)	(350)	n/a	(300)	(200)	750
Change from last week	75	-	n/a	-	-	100
Change from same week 2010	(187)	(150)	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:						
5/2/2011	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	\$187	\$30.49	\$0.83
	Grand Forks, ND	Duluth-Superior, MN	\$2,822	\$107	\$29.09	\$0.79
	Wichita, KS	Los Angeles, CA	\$5,710	\$551	\$62.17	\$1.69
	Wichita, KS	New Orleans, LA	\$3,384	\$329	\$36.87	\$1.00
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$452	\$58.21	\$1.58
	Northwest KS	Galveston-Houston, TX	\$3,651	\$361	\$39.84	\$1.08
	Amarillo, TX	Los Angeles, CA	\$3,850	\$502	\$43.22	\$1.18
Corn	Champaign-Urbana, IL	New Orleans, LA	\$2,812	\$372	\$31.62	\$0.86
	Toledo, OH	Raleigh, NC	\$3,760	\$416	\$41.47	\$1.13
	Des Moines, IA	Davenport, IA	\$1,843	\$79	\$19.08	\$0.52
	Indianapolis, IN	Atlanta, GA	\$3,196	\$312	\$34.84	\$0.95
	Indianapolis, IN	Knoxville, TN	\$2,760	\$200	\$29.40	\$0.80
	Des Moines, IA	Little Rock, AR	\$2,938	\$232	\$31.48	\$0.86
	Des Moines, IA	Los Angeles, CA	\$4,372	\$675	\$50.11	\$1.36
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,206	\$402	\$35.83	\$0.98
	Toledo, OH	Huntsville, AL	\$2,921	\$295	\$31.94	\$0.87
	Indianapolis, IN	Raleigh, NC	\$3,830	\$419	\$42.19	\$1.15
	Indianapolis, IN	Huntsville, AL	\$2,613	\$200	\$27.94	\$0.76
	Champaign-Urbana, IL	New Orleans, LA	\$3,156	\$372	\$35.04	\$0.95
<b>Shuttle Train</b>						
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$317	\$35.31	\$0.96
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$247	\$33.67	\$0.92
	Chicago, IL	Albany, NY	\$3,497	\$390	\$38.60	\$1.05
	Grand Forks, ND	Portland, OR	\$4,702	\$547	\$52.13	\$1.42
	Grand Forks, ND	Galveston-Houston, TX	\$5,648	\$570	\$61.75	\$1.68
	Northwest KS	Portland, OR	\$4,619	\$592	\$51.74	\$1.41
	Corn	Minneapolis, MN	Portland, OR	\$4,680	\$666	\$53.09
Sioux Falls, SD		Tacoma, WA	\$4,640	\$610	\$52.14	\$1.42
Champaign-Urbana, IL		New Orleans, LA	\$2,677	\$372	\$30.28	\$0.82
Lincoln, NE		Galveston-Houston, TX	\$3,190	\$356	\$35.21	\$0.96
Des Moines, IA		Amarillo, TX	\$3,330	\$291	\$35.96	\$0.98
Minneapolis, MN		Tacoma, WA	\$4,680	\$661	\$53.04	\$1.44
Council Bluffs, IA		Stockton, CA	\$4,080	\$684	\$47.31	\$1.29
Soybeans	Sioux Falls, SD	Tacoma, WA	\$4,840	\$610	\$54.12	\$1.47
	Minneapolis, MN	Portland, OR	\$4,830	\$666	\$54.58	\$1.49
	Fargo, ND	Tacoma, WA	\$4,730	\$543	\$52.36	\$1.43
	Council Bluffs, IA	New Orleans, LA	\$3,510	\$429	\$39.12	\$1.06
	Toledo, OH	Huntsville, AL	\$2,536	\$295	\$28.12	\$0.77
Grand Island, NE	Portland, OR	\$4,520	\$606	\$50.90	\$1.39	

<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: 5/2/2011				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	\$579	\$75.95	\$2.06	6
	OK	Cuautitlan, EM	\$6,191	\$606	\$69.45	\$1.89	8
	KS	Guadalajara, JA	\$6,825	\$832	\$78.24	\$2.13	9
	TX	Salinas Victoria, NL	\$3,277	\$237	\$35.90	\$0.98	6
Corn	IA	Guadalajara, JA	\$7,520	\$872	\$85.74	\$2.18	12
	SD	Penjamo, GJ	\$7,245	\$757	\$81.77	\$2.07	9
	NE	Queretaro, QA	\$6,590	\$779	\$75.29	\$1.91	11
	SD	Salinas Victoria, NL	\$5,360	\$576	\$60.65	\$1.54	13
	MO	Tlalnepantla, EM	\$5,762	\$759	\$66.63	\$1.69	12
	SD	Torreón, CU	\$6,248	\$634	\$70.32	\$1.78	13
Soybeans	MO	Bojay (Tula), HG	\$6,705	\$758	\$76.25	\$2.07	10
	NE	Guadalajara, JA	\$7,519	\$862	\$85.63	\$2.33	14
	IA	El Castillo, JA <sup>5</sup>	\$7,770	\$753	\$87.08	\$2.37	12
	KS	Torreón, CU	\$6,042	\$593	\$67.78	\$1.84	15
Sorghum	OK	Cuautitlan, EM	\$5,350	\$575	\$60.54	\$1.54	18
	TX	Guadalajara, JA	\$6,289	\$493	\$69.29	\$1.76	11
	NE	Penjamo, GJ	\$6,905	\$797	\$78.70	\$2.00	8
	KS	Queretaro, QA	\$6,038	\$538	\$67.18	\$1.70	13
	NE	Salinas Victoria, NL	\$4,818	\$511	\$54.45	\$1.38	13
	NE	Torreón, CU	\$5,804	\$634	\$65.78	\$1.67	11

<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

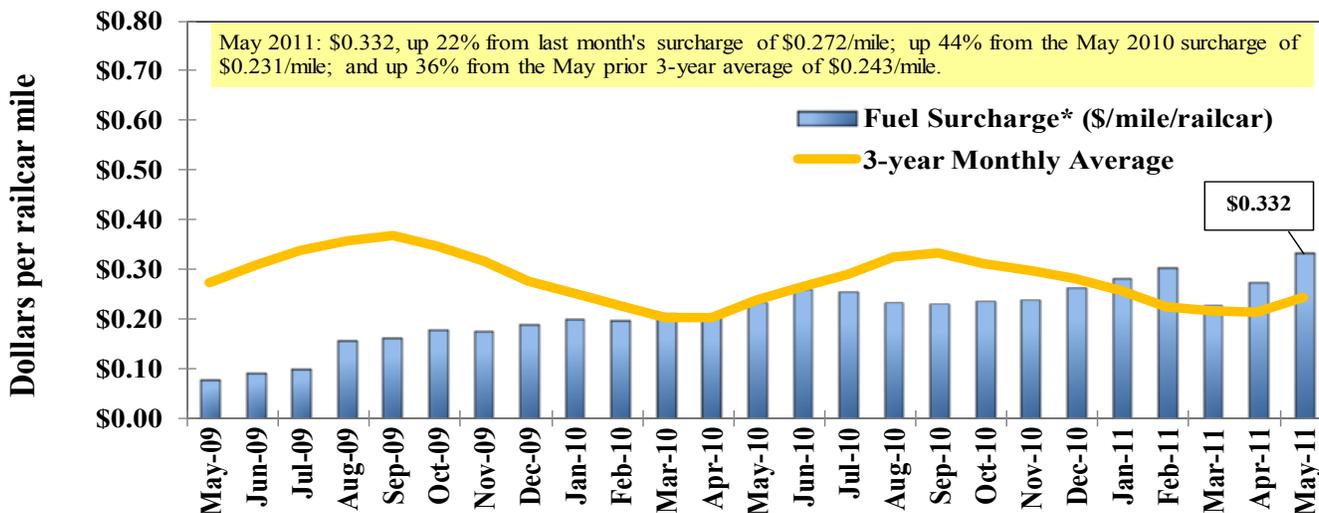
<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

<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.

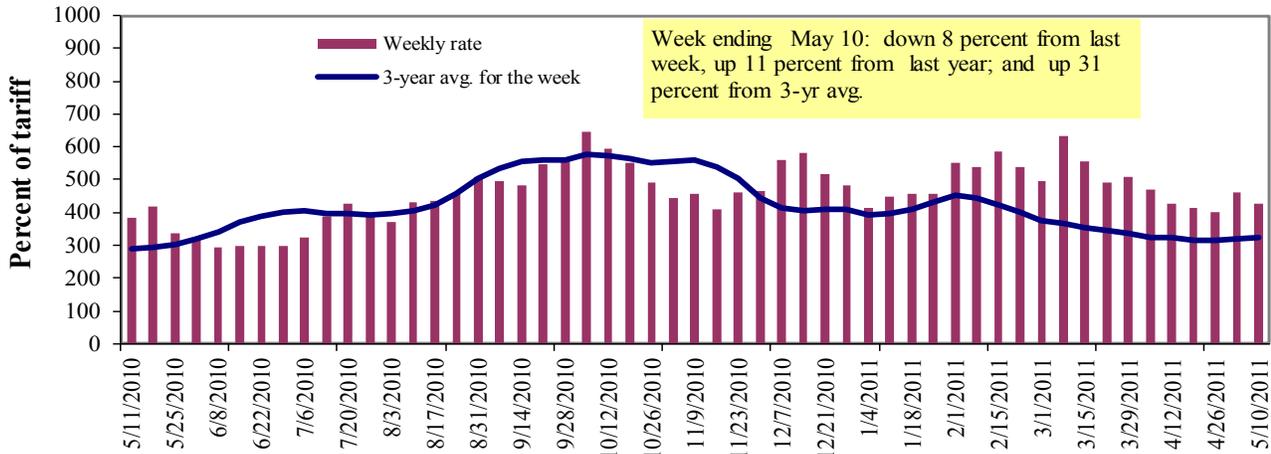
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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

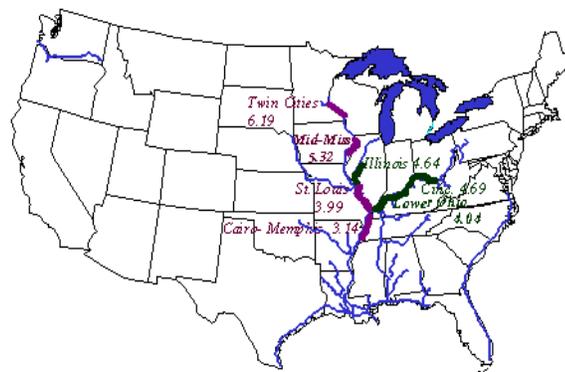
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate <sup>1</sup>	5/10/2011	555	445	425	325	400	405	-
	5/3/2011	-	465	460	328	387	387	-
\$/ton	5/10/2011	-	23.67	19.72	12.97	18.76	16.36	-
	5/3/2011	-	24.74	21.34	13.09	18.15	15.63	-
<b>Current week % change from the same week:</b>								
	Last year	32	15	11	19	53	55	-
	3-year avg. <sup>2</sup>	43	28	31	34	55	57	-
Rate <sup>1</sup>	June	553	467	458	347	438	438	-
	August	575	542	533	492	550	550	-

<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



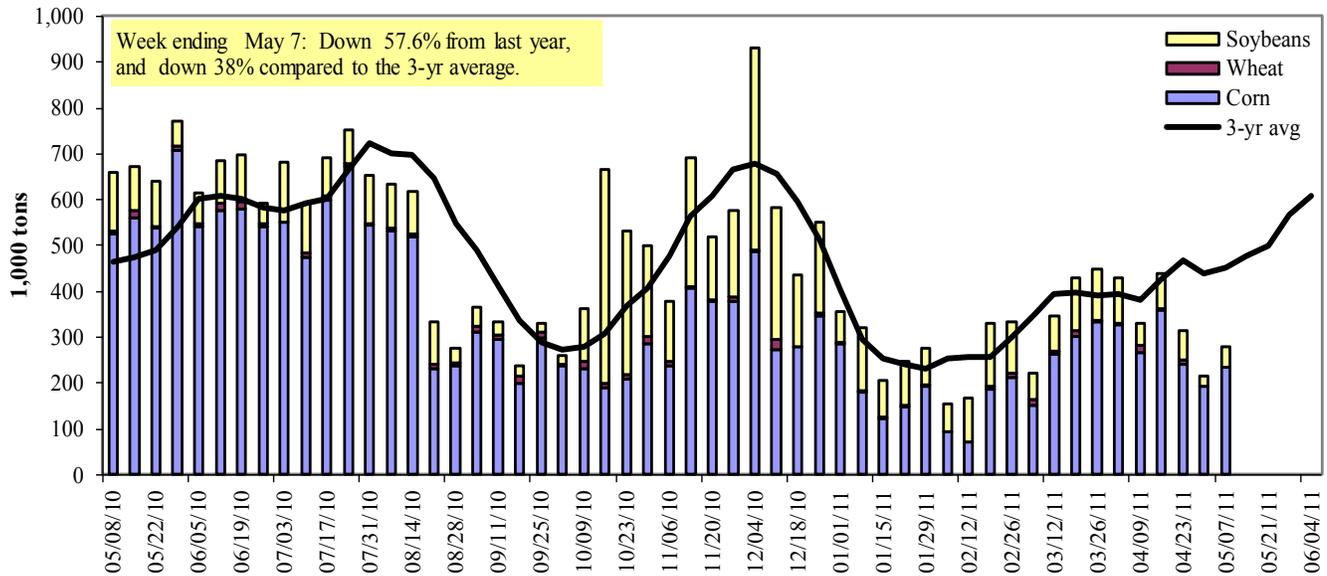
### Calculating barge rate per ton:

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

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

Table 10

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

Week ending 5/7/2011	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	137	0	35	0	172
Winfield, MO (L25)	125	0	18	0	143
Alton, IL (L26)	212	0	50	3	265
Granite City, IL (L27)	234	0	46	5	285
<b>Illinois River (L8)</b>	112	2	21	3	138
<b>Ohio River (L52)</b>	0	0	3	0	3
<b>Arkansas River (L1)</b>	0	0	0	0	0
Weekly total - 2011	234	0	49	5	288
Weekly total - 2010	644	29	169	13	855
2011 YTD <sup>1</sup>	5,857	385	3,075	125	9,441
2010 YTD	6,797	367	3,343	155	10,662
2011 as % of 2010 YTD	86	105	92	81	89
Last 4 weeks as % of 2010 <sup>2</sup>	63	79	64	63	64
<b>Total 2010</b>	<b>22,768</b>	<b>1,220</b>	<b>10,373</b>	<b>481</b>	<b>34,841</b>

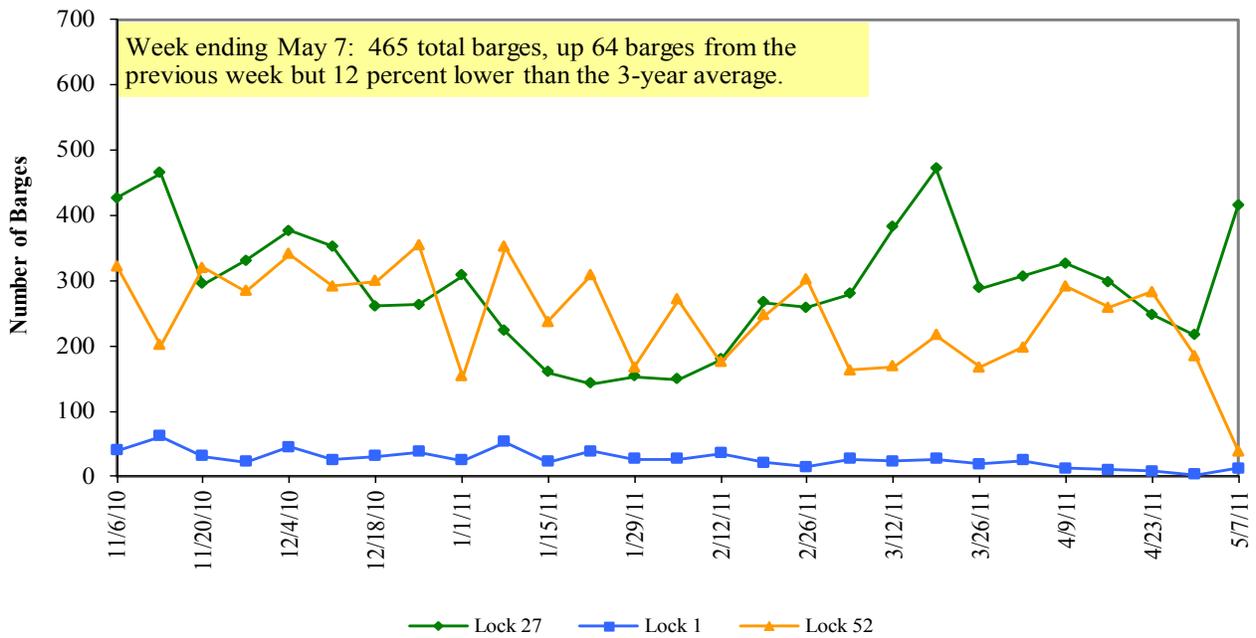
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

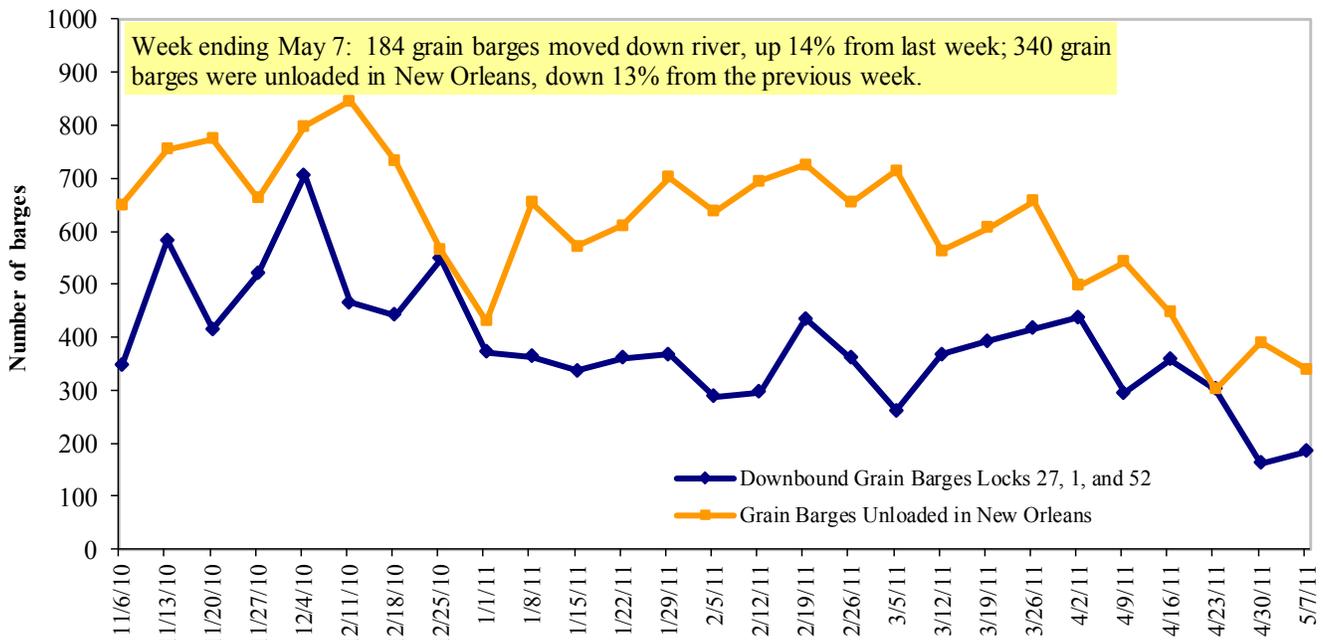
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrini/omni/webprts/default.asp](http://www.mvr.usace.army.mil/mvrini/omni/webprts/default.asp))

**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 5/9/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.117	-0.011	0.981
	New England	4.218	-0.013	1.057
	Central Atlantic	4.248	-0.021	1.002
	Lower Atlantic	4.052	-0.007	0.965
II	Midwest <sup>2</sup>	4.066	-0.020	0.964
III	Gulf Coast <sup>3</sup>	4.022	-0.038	0.935
IV	Rocky Mountain	4.156	0.000	0.987
V	West Coast	4.307	-0.021	1.074
	California	4.459	-0.006	1.190
Total	U.S.	4.104	-0.020	0.977

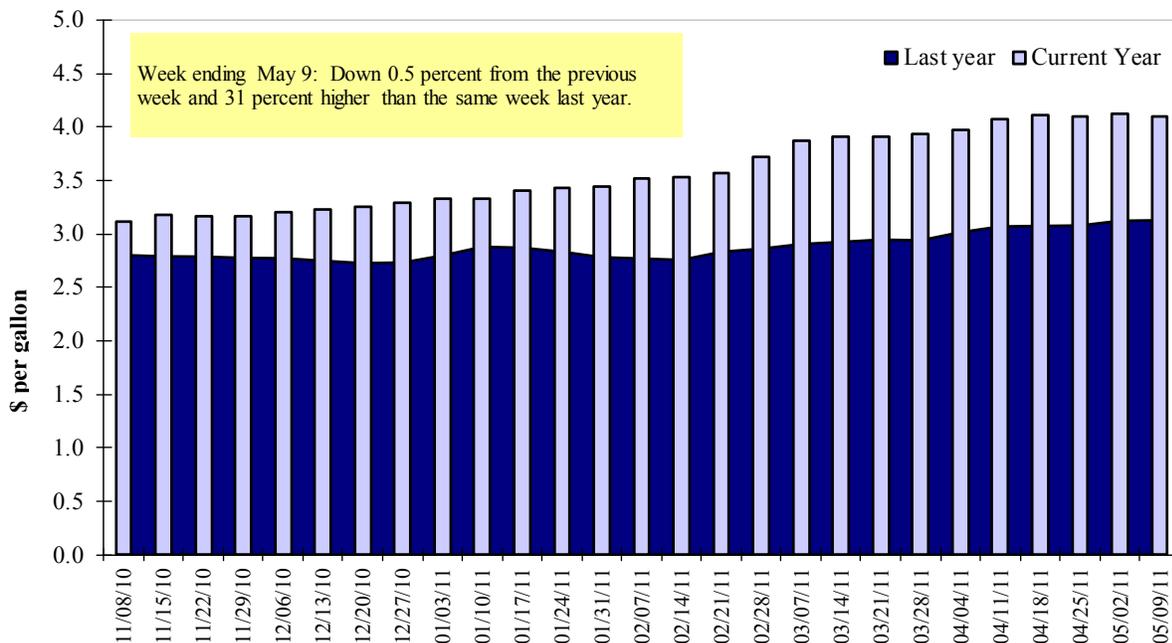
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
4/28/2011	2,567	461	1,402	988	60	5,477	11,816	4,742	22,035
This week year ago	910	258	683	406	92	2,348	11,338	1,874	15,560
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2010/11 YTD	14,158	2,403	7,768	4,246	908	29,482	29,191	36,344	95,017
2009/10 YTD	7,651	2,610	4,906	3,605	903	19,675	30,084	35,504	85,263
YTD 2010/11 as % of 2009/10	185	92	158	118	101	150	97	102	111
Last 4 wks as % of same period 2009/10	317	217	251	283	81	272	111	265	154
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 04/28/11	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2011/12 Next MY	2010/11 Current MY	2009/10 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	656	12,516	11,856	6	14,343
Mexico	1,057	6,488	7,447	(13)	7,999
Korea	1	4,607	6,842	(33)	7,562
Taiwan	0	2,365	2,710	(13)	2,949
Egypt	40	2,437	1,912	27	2,935
<b>Top 5 importers</b>	<b>1,754</b>	<b>28,412</b>	<b>30,766</b>	<b>(8)</b>	<b>35,788</b>
<b>Total US corn export sales</b>	<b>3,227</b>	<b>41,007</b>	<b>41,422</b>	<b>(1)</b>	<b>50,460</b>
% of Projected		85%	82%		
Change from Last Week		284	1,851		
<b>Top 5 importers' share of U.S. corn export sales</b>		69%	74%		
<b>USDA forecast, May 2011</b>	<b>45,720</b>	<b>48,260</b>	<b>50,460</b>	<b>(4)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol May 2011</b>	<b>128,270</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 04/28/2011	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup>  2009/10
	2011/12 Current MY	2010/11 Current MY	2009/10 Last MY		
		- 1,000 mt -			- 1,000 mt -
China	5,907	25,231	21,723	16	22,454
Mexico	74	2,699	2,642	2	3,276
Japan	114	1,960	2,044	(4)	2,347
EU-25	60	2,599	2,666	(3)	2,647
Taiwan	0	1,234	1,402	(12)	1,556
<b>Top 5 importers</b>	<b>6,155</b>	<b>33,722</b>	<b>30,476</b>	<b>11</b>	<b>32,280</b>
<b>Total US soybean export sales</b>	<b>6,720</b>	<b>41,065</b>	<b>37,094</b>	<b>11</b>	<b>40,850</b>
% of Projected		97%	91%		
Change from last week		144	101		
<b>Top 5 importers' share of U.S. soybean export sales</b>	92%	82%	82%		
<b>USDA forecast, May 2011</b>	<b>41,910</b>	<b>42,180</b>	<b>40,850</b>	<b>3</b>	
<b>Soybean Use for Biodiesel USDA forecast, May 2011</b>	<b>8,393</b>	<b>5,995</b>	<b>4,076</b>	<b>47</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 04/28/2011	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup>  2009/10
	2011/12 Next MY	2010/11 Current MY	2009/10 Last MY		
		- 1,000 mt -			- 1,000 mt -
Nigeria	165	3,635	3,403	7	3,233
Japan	146	3,610	3,265	11	3,148
Mexico	285	2,638	1,941	36	1,975
Philippines	611	1,884	1,568	20	1,518
Korea, South	47	1,654	1,202	38	1,111
Taiwan	41	951	856	11	844
Venezuela	79	632	718	(12)	658
Colombia	138	817	547	49	575
Peru	0	984	531	85	567
Egypt	766	3,948	456	766	529
<b>Top 10 importers</b>	<b>2,278</b>	<b>20,750</b>	<b>14,485</b>	<b>43</b>	<b>14,156</b>
<b>Total US wheat export sales</b>	<b>2,644</b>	<b>34,959</b>	<b>22,023</b>	<b>59</b>	<b>23,980</b>
% of Projected	9%	101%	92%		
Change from last week		274	150		
<b>Top 10 importers' share of U.S. wheat export sales</b>	86%	59%	66%		
<b>USDA forecast, May 2011</b>	<b>28,580</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 05/05/11	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	355	413	86	5,016	3,732	134	160	176	11,062
Corn	112	299	37	2,967	3,340	89	91	83	9,950
Soybeans	66	0	n/a	2,999	4,209	71	95	69	10,191
<b>Total</b>	<b>533</b>	<b>712</b>	<b>75</b>	<b>10,982</b>	<b>11,281</b>	<b>97</b>	<b>121</b>	<b>114</b>	<b>31,203</b>
<b>Mississippi Gulf</b>									
Wheat	134	98	136	2,014	1,366	147	154	179	4,199
Corn	462	438	105	9,321	9,850	95	95	93	29,794
Soybeans	39	117	33	9,002	8,070	112	93	62	22,519
<b>Total</b>	<b>634</b>	<b>654</b>	<b>97</b>	<b>20,337</b>	<b>19,285</b>	<b>105</b>	<b>101</b>	<b>93</b>	<b>56,512</b>
<b>Texas Gulf</b>									
Wheat	392	398	98	5,486	2,813	195	267	239	9,339
Corn	44	0	n/a	503	780	64	71	83	1,859
Soybeans	3	0	n/a	763	667	114	13	24	1,916
<b>Total</b>	<b>439</b>	<b>398</b>	<b>110</b>	<b>6,752</b>	<b>4,260</b>	<b>159</b>	<b>216</b>	<b>207</b>	<b>13,115</b>
<b>Great Lakes</b>									
Wheat	43	64	68	302	156	193	294	305	1,897
Corn	0	0	n/a	0	16	0	0	0	119
Soybeans	0	0	n/a	0	0	n/a	n/a	0	655
<b>Total</b>	<b>43</b>	<b>64</b>	<b>68</b>	<b>302</b>	<b>172</b>	<b>176</b>	<b>250</b>	<b>242</b>	<b>2,672</b>
<b>Atlantic</b>									
Wheat	1	6	24	414	99	416	1,905	154	343
Corn	0	7	0	105	130	80	72	92	469
Soybeans	7	10	69	387	672	58	118	104	1,417
<b>Total</b>	<b>8</b>	<b>23</b>	<b>37</b>	<b>905</b>	<b>902</b>	<b>100</b>	<b>230</b>	<b>127</b>	<b>2,229</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	926	979	95	13,232	8,166	162	197	201	26,839
Corn	618	744	83	12,896	14,116	91	92	89	42,192
Soybeans	115	128	90	13,150	13,618	97	92	65	36,699
<b>Total</b>	<b>1,659</b>	<b>1,851</b>	<b>90</b>	<b>39,279</b>	<b>35,901</b>	<b>109</b>	<b>126</b>	<b>117</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); YTD= year-to-date; n/a = not applicable

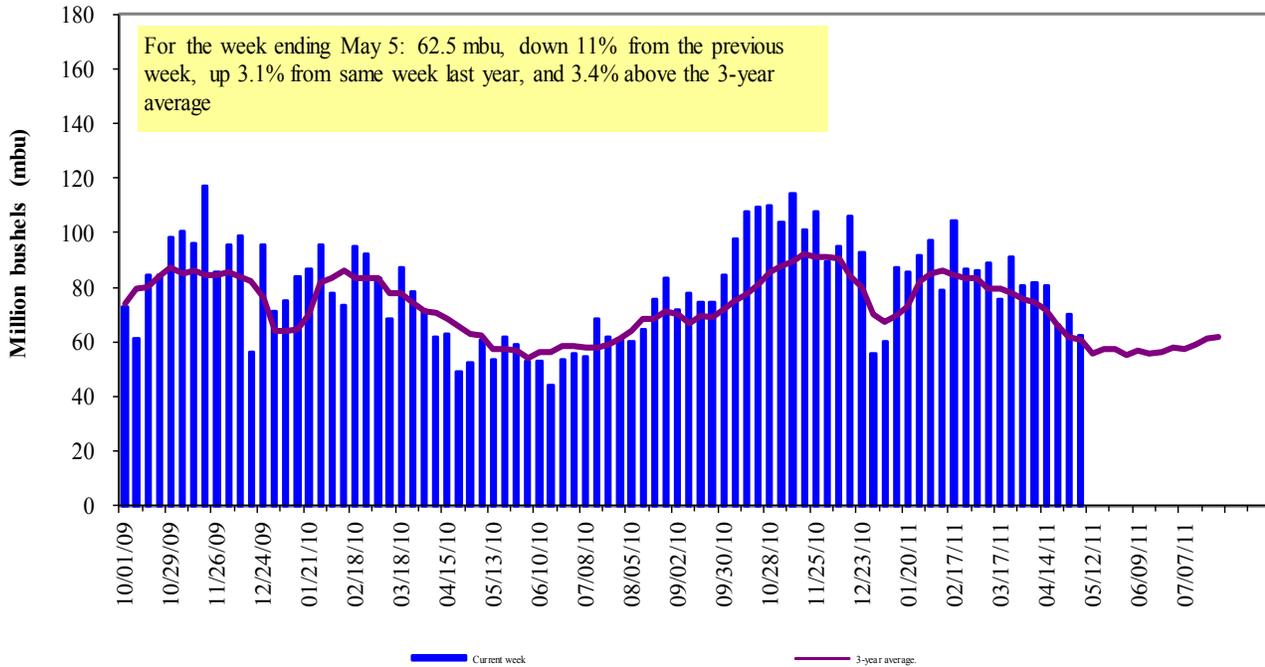
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The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 61 percent of the 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)**

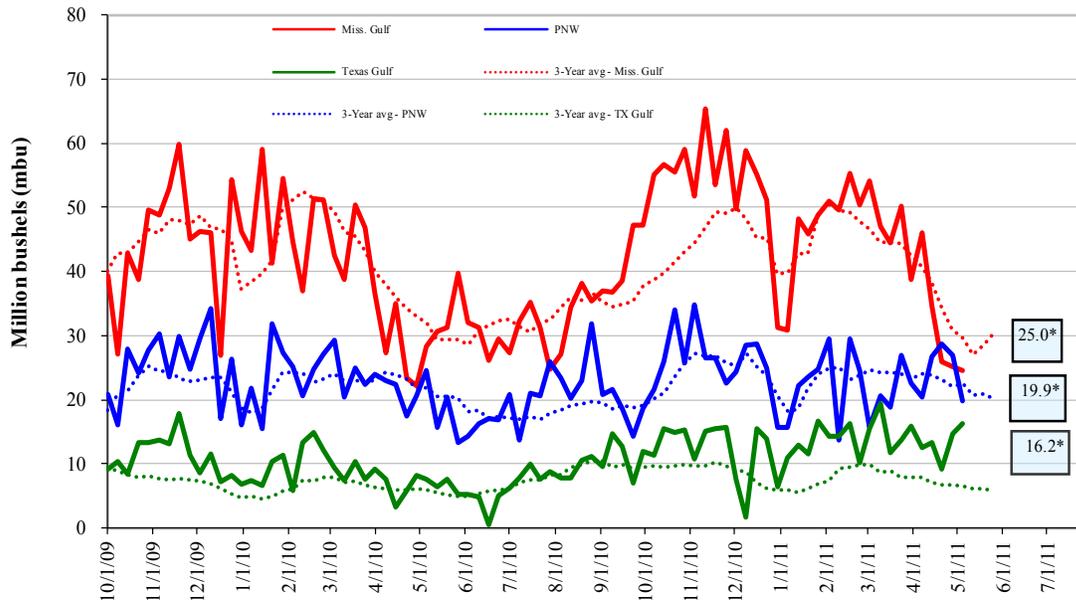


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

May 5 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 3	up 11	up 2.4	down 26
Last year (same week)	down 14	up 112	up 13	down 19
3-yr avg. (4-wk mov. avg.)	down 17	up 150	up 13	down 21

# Ocean Transportation

Table 17

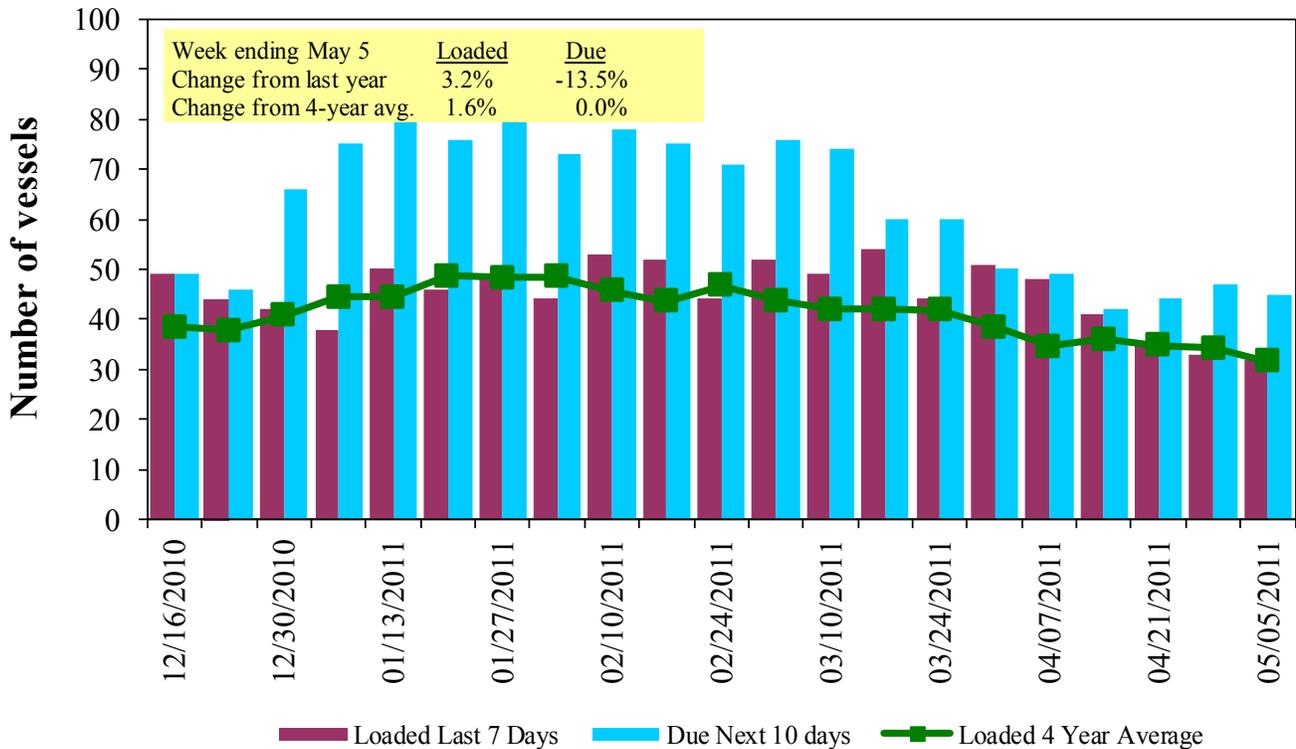
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
5/5/2011	32	32	45	22	12
4/28/2011	31	33	47	22	16
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**

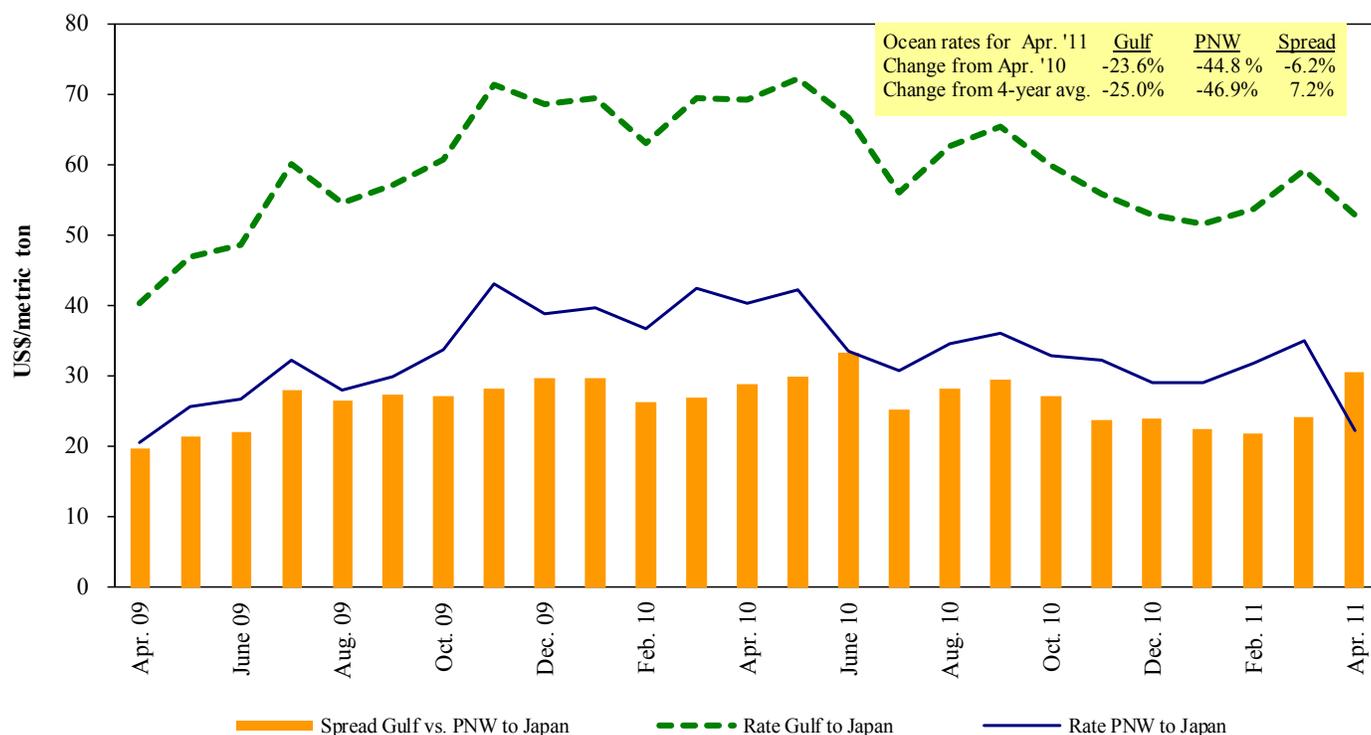


Source: Transportation & Marketing Programs/AMS/USDA

<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 05/07/2011

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
PNW	Rotterdam	Heavy Grain	Feb 15/25	55,000	26.00
Brazil	China	Heavy Grain	May 18/27	60,000	49.50
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

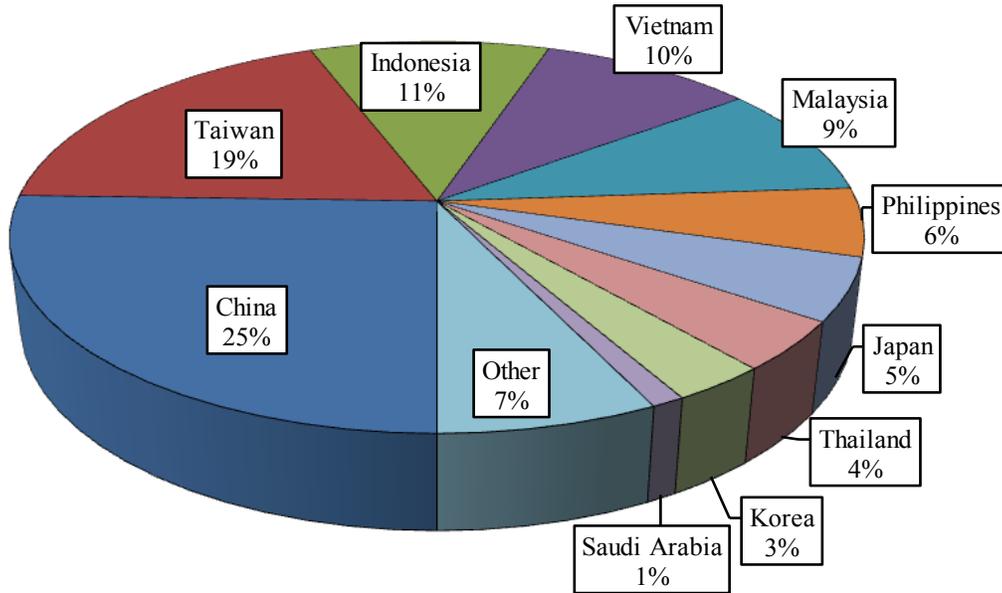
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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

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**

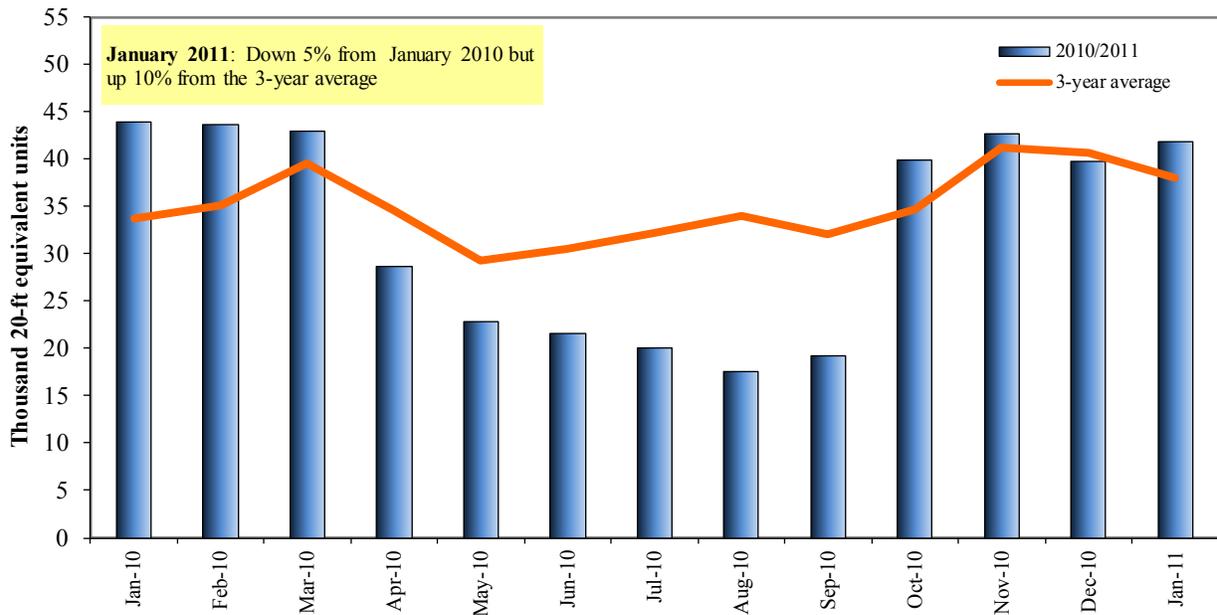


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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