



# Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division  
[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

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Nov. 14, 2013

## WEEKLY HIGHLIGHTS

### Contents

Article/  
Calendar

Grain  
Transportation  
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean  
Rate Advisory

Data Links

Specialists

Subscription  
Information

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The next  
release is  
Nov. 21, 2013

### AMS Releases Profiles of Top U.S. Agricultural Ports in 2012

USDA's Agricultural Marketing Service published [a new report showing the top 20 U.S. ocean ports](#) for the movement of agricultural imports and exports. The new report displays the amount of the top agricultural products moved through the individual ports, with breakouts for containerized and bulk cargos. It also provides data on the use of refrigeration, the top origin and destination markets, and top shipping lines used. The data are sourced from the Port Import Export Reporting Service (PIERS), which is a collection of bills of lading and manifest data. The data are not official trade data, as only the waterborne portions of trade are provided.

### Mississippi Gulf Soybean Inspections Reach Record Level

For the week ending November 7, **total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 2.93 million metric tons (mmt), down 9 percent from the previous week but 32 percent above last year and 8 percent above the 3-year average. Total wheat inspections rebounded from the previous week, increasing 37 percent, on increased shipments to Asia and Mexico. Corn inspections dropped 46 percent. Total inspections of soybeans were unchanged from the past week, but Mississippi Gulf soybean inspections were the highest on record at 1.26 mmt. Soybean shipments from the Mississippi Gulf were destined primarily to China and other Asian destinations. During the last four weeks, total grain inspections were 32 percent above last year at this time and 16 percent above the 3-year average. Outstanding (unshipped) sales of corn, wheat, and soybeans for the past week are higher than last year at this time, and cumulative (shipped) year-to-date export sales are up from last year for wheat and corn ([Table 12](#)).

### Large Barge Movements Continue As Soybean Harvest Nears Completion

As of November 10, 91 percent of the soybean crop was harvested, slightly behind the 5-year average pace of 92 percent. The corn harvest is 84 percent complete, slightly ahead of the 5-year average pace of 79 percent. For the week ending November 9, 459,000 tons of soybeans were transported by barge, representing 58 percent of downbound barge grain movements originating on the locking portions of the river system. Corn movements were 39 percent of downbound grain barge movements. Barge rates increased this week, especially on the Ohio River, due to the above-average pace of the corn harvest and continued large movements of soybeans. According to barge operators and shippers, the barge supply for December should be sufficient.

### Soy Transportation Coalition Releases Study

The Soy Transportation Coalition has released a new study on rural infrastructure that examines the condition, shortcomings, and potential proposals to address rural infrastructure needs. The report is available at [www.soytransportation.org](http://www.soytransportation.org).

## Snapshots by Sector

### **Rail**

U.S. railroads originated 20,833 **carloads of grain** during the week ending November 2, down 17 percent from last week, up 9 percent from last year, and down 8 percent from the 3-year average.

During the week ending November 7, average November non-shuttle **secondary railcar bids/offers per car** were \$525 above tariff, down \$383.50 from last week and \$530.50 higher than last year. Average shuttle bids/offers were \$1125 above tariff, down \$571 from last week and \$1369 higher than last year.

### **Barge**

During the week ending November 9, **barge grain movements** totaled 790,600 tons, 7.7 percent lower than the previous week but 20 percent higher than the same period last year.

During the week ending November 9, 503 grain barges **moved down river**, down 8.4 percent from last week; 934 grain barges were **unloaded in New Orleans**, up 1.4 percent from the previous week.

### **Ocean**

During the week ending November 7, 45 **ocean-going grain vessels** were loaded in the Gulf, 25 percent more than the same period last year. Seventy-seven vessels are expected to be loaded within the next 10 days, 40 percent more than the the same period last year.

During the week ending November 8, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$54.50 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$30 per mt, down 2 percent from the previous week.

### **Fuel**

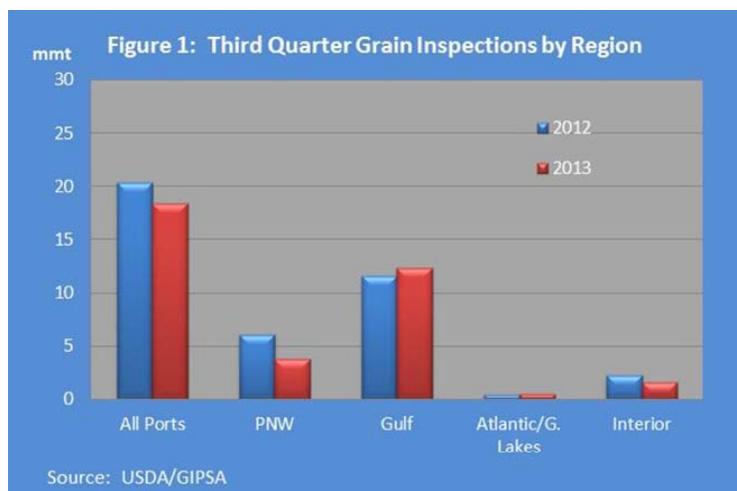
During the week ending November 11, U.S. average **diesel fuel prices** decreased 3 cents from the previous week to \$3.83 per gallon—15 cents lower than the same week last year.

# Feature Article/Calendar

## Third Quarter Grain Inspections Continue to Decrease; Wheat Reaches Record

Third quarter 2013 inspections of wheat, corn, and soybeans for export from all U.S. ports totaled 18.37 million metric tons (mmt), down 10 percent from this time last year and 21 percent below the 5-year average (see figure 1). Third quarter inspections were 33 percent greater than the previous quarter according to the Grain Inspection, Packers, and Stockyards Administration (GIPSA). Demand for U.S. grain rebounded from the previous quarter as the wheat harvest began. Third quarter shipments of grain to Asia, Mexico, and South America were up from the second quarter. Despite the drop in total grain inspections, wheat shipments reached record levels as demand from Brazil and China increased and U.S. prices continued to drop. According to the November World Agricultural Supply and Demand Estimates (WASDE), the 2013/14 forecast for wheat exports is up 9 percent from the previous year and unchanged from the September forecast. Corn exports are projected to increase 92 percent from last year, and soybean exports are expected to increase 10 percent.

Third quarter U.S. Gulf grain inspections totaled 12.38 mmt, up 7 percent from last year but 9 percent below the 5-year average (see figure 1). The Gulf's share of total exports is up slightly from last year. Third-quarter rail deliveries to the U.S. Gulf ports increased 127 percent from last year. Barge movements on the Mississippi River were down 55 percent from last year during the third quarter. Ocean rates increased 4 and 11 percent from the second quarter in the U.S. Gulf and Pacific Northwest (PNW), respectively. The third quarter ocean rate spread has remained about the same as last year.



Total PNW grain inspections reached 3.82 mmt, down 37 percent from last year and 42 percent below the 5-year average (see figure 1). PNW corn and soybean inspections were 90 percent lower than last year, and soybeans dropped 99 percent. These large drops squeezed the PNW's share of total grain exports to 21 percent from an average of 29 percent in the last 5 years. Third quarter Atlantic/Great Lakes grain inspections totaled .520 mmt, up 12 percent from last year.

### Wheat Inspections Reach Record High

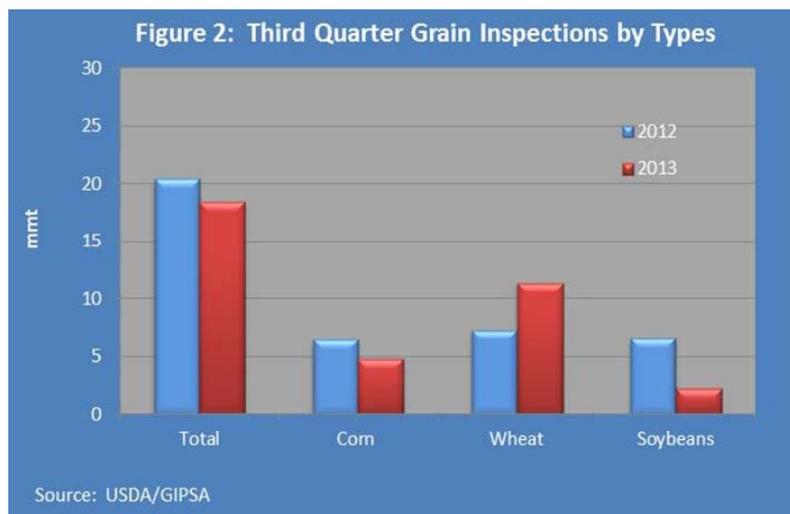
According to GIPSA, third quarter wheat inspections at all ports reached a record 11.38 mmt, up 56 percent from last year and 44 percent above the 5-year average (see figure 2). Third quarter wheat exports to Brazil and China increased. Third quarter wheat inspections in the U.S. Gulf reached 6.85 mmt, up 141 percent from last year. Although total wheat inspections increased during the third quarter, PNW wheat inspections decreased 6 percent from last year to .371 mmt. According to the November WASDE, U.S. wheat exports for the 2013/14 marketing year are expected to rise, pushed up by lower prices and higher demand.

### Soybean and Corn Inspections at Record Low

U.S. soybean inspections reached a record low 2.19 mmt during the third quarter, down 67 percent from last year and 46 percent below the 5-year average (figure 2). Shipments of soybeans to Asia accounted for 44 percent of all U.S. soybeans inspected for export during the third quarter, with shipments to China accounting for 31 percent of total soybean exports destined for Asia. Soybean inspections reached a record low in the PNW during the third quarter, and U.S. Gulf soybean inspections were the lowest since 2008. About 84 percent of total soybean inspections occurred in the U.S. Gulf. Interior (inland-based) soybean inspections accounted for 14 percent of total third-quarter soybean inspections. During September 2013,

outstanding (unshipped) soybean export sales were beginning to rebound, averaging 21 mmt, 42 percent above this time last year.

The U.S. has faced increased corn export competition as U.S. corn prices increased during the third quarter due to the drought last year. Third quarter corn inspections (4.80 mmt) were the lowest on record, down 24 percent from last year and 57 percent below the 5-year average. Corn inspections decreased at all port regions during the third quarter. Gulf corn inspections decreased 25 percent from last year to a



record low of 3.70 mmt. PNW corn inspections decreased 90 percent to .098 mmt and resulted in smaller shipments to Asia. Atlantic/Great Lakes corn inspections decreased 38 percent from last year to .039 mmt. Increased U.S. production is expected to cause U.S. corn exports to increase notably for the 2013/14 marketing year.

### Market Outlook

According to the Foreign Agricultural Service, export sales are strong for corn and soybeans due to a larger harvest. Although cumulative (shipped) export sales (Table 12) are down year-to-date for corn and soybeans, total commitments are up 88 and 25 percent, respectively. With prices for grain projected to decrease, corn, soybean, and wheat exports during the 2013/14 marketing are expected to increase.

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# Grain Transportation Indicators

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

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
11/13/13	257	268	263	384	244	213
11/06/13	259	290	288	324	244	216

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

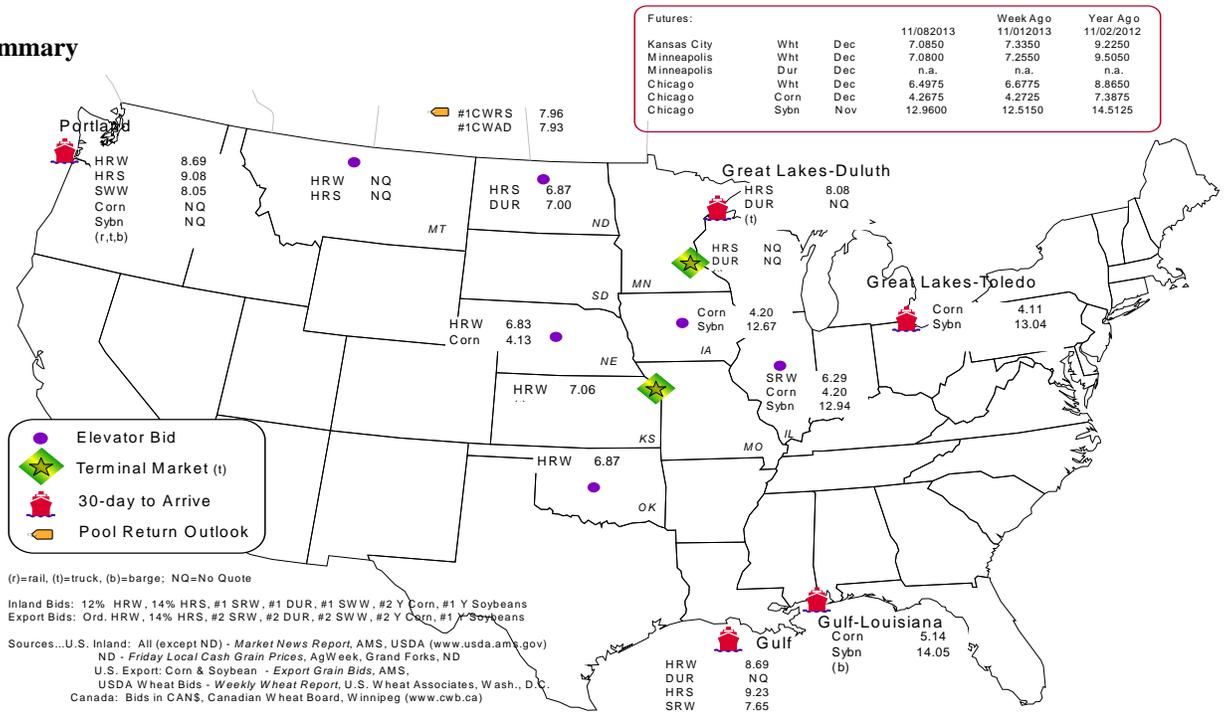
Commodity	Origin--Destination	11/8/2013	11/1/2013
Corn	IL--Gulf	-0.94	-0.94
Corn	NE--Gulf	-1.01	-0.94
Soybean	IA--Gulf	-1.38	-1.42
HRW	KS--Gulf	-1.63	-1.60
HRS	ND--Portland	-2.21	-2.39

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1  
Grain bid Summary



# Rail Transportation

Table 3

## Rail Deliveries to Port (carloads)<sup>1</sup>

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
11/06/2013 <sup>p</sup>	1,956	970	5,833	1,387	10,146	11/02/13	1,340
10/30/2013 <sup>r</sup>	1,786	766	6,523	1,328	10,403	10/26/13	2,226
2013 YTD <sup>r</sup>	19,444	63,426	127,075	17,113	227,058	2013 YTD	57,640
2012 YTD <sup>r</sup>	14,283	35,862	173,138	17,856	241,139	2012 YTD	83,109
2013 YTD as % of 2012 YTD	136	177	73	96	94	% change YTD	69
Last 4 weeks as % of 2012 <sup>2</sup>	200	133	160	123	157	Last 4wks % 2012	120
Last 4 weeks as % of 4-year avg. <sup>2</sup>	150	79	139	144	131	Last 4wks % 4 yr	107
Total 2012	22,604	40,780	199,419	41,772	287,462	Total 2012	92,008
Total 2011	27,358	77,515	191,187	24,088	320,148	Total 2011	97,118

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

<sup>2</sup> Compared with same 4-weeks in 2012 and prior 4-year average.

<sup>3</sup> Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Ferromex.

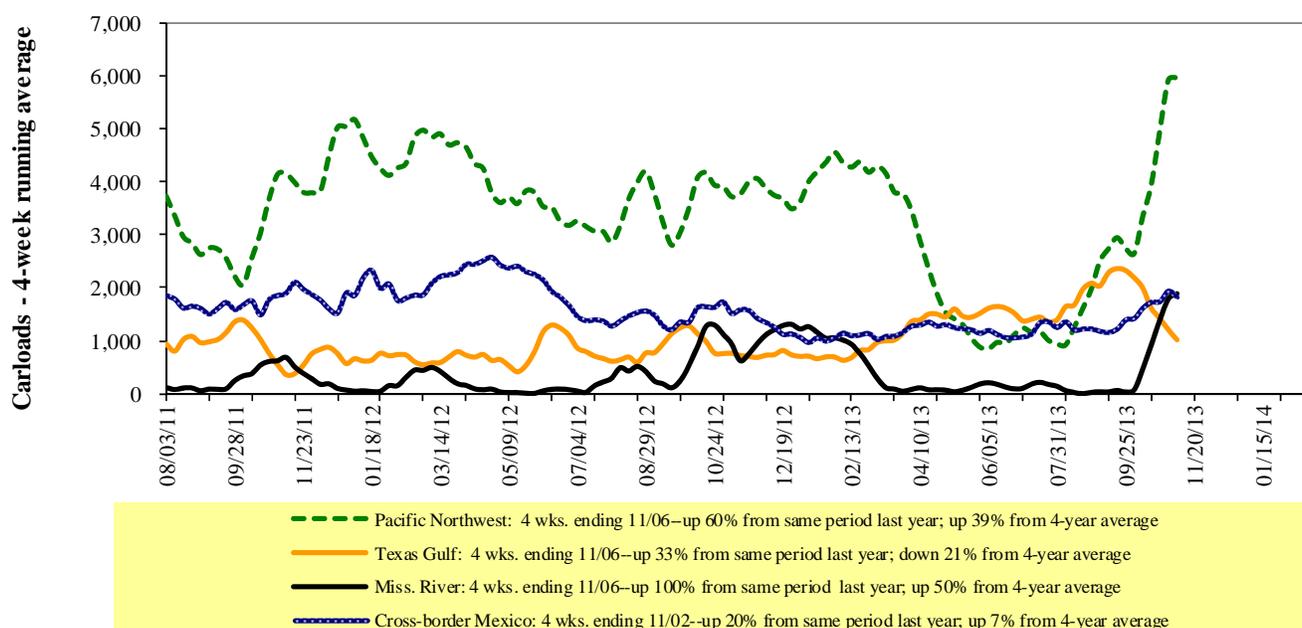
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

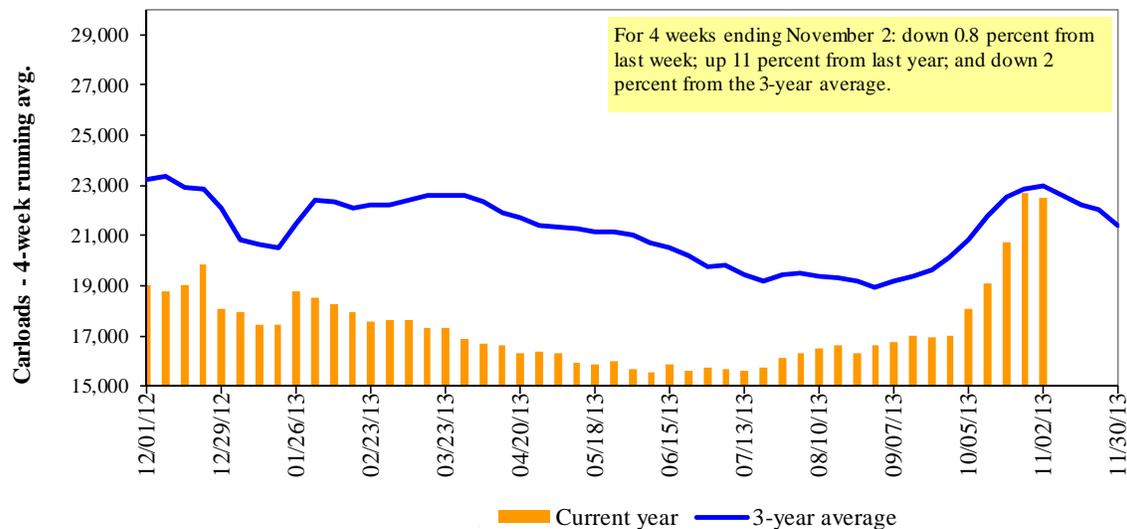
Table 4

**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
11/02/13	2,924	3,932	7,692	1,026	5,259	20,833	5,447	6,379
This week last year	1,897	3,036	10,462	611	3,129	19,135	4,496	6,039
2013 YTD	67,113	109,730	382,646	27,539	176,861	763,889	152,672	229,028
2012 YTD	72,496	122,657	437,283	22,731	213,795	868,962	171,582	217,879
2013 YTD as % of 2012 YTD	93	89	88	121	83	88	89	105
Last 4 weeks as % of 2012	146	125	87	216	136	111	115	98
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	119	115	86	164	95	98	116	104
Total 2012	85,384	145,336	515,638	26,936	244,077	1,017,371	204,068	266,266

<sup>1</sup>As a percent of the same period in 2009 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

**Figure 3****Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

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

Week ending	Delivery period							
	Nov-13	Nov-12	Dec-13	Dec-12	Jan-14	Jan-13	Feb-14	Feb-13
BNSF <sup>3</sup>								
COT grain units	no offer	no bids	no offer	0	no offer	no bids	no offer	no bids
COT grain single-car <sup>5</sup>	no offer	0 . . 1	no offer	0 . . 5	no offer	0 . . 1	no offer	1
UP <sup>4</sup>								
GCAS/Region 1	305	no bids	31	no bids	1	no bids	n/a	n/a
GCAS/Region 2	410	no bids	63	no bids	1	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.

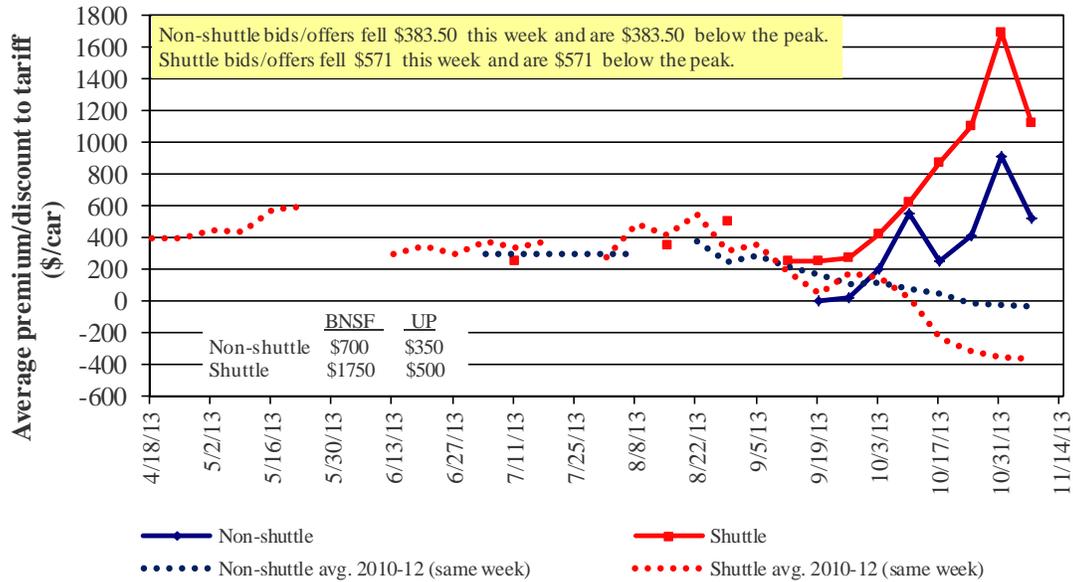
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 November 2013, Secondary Market**

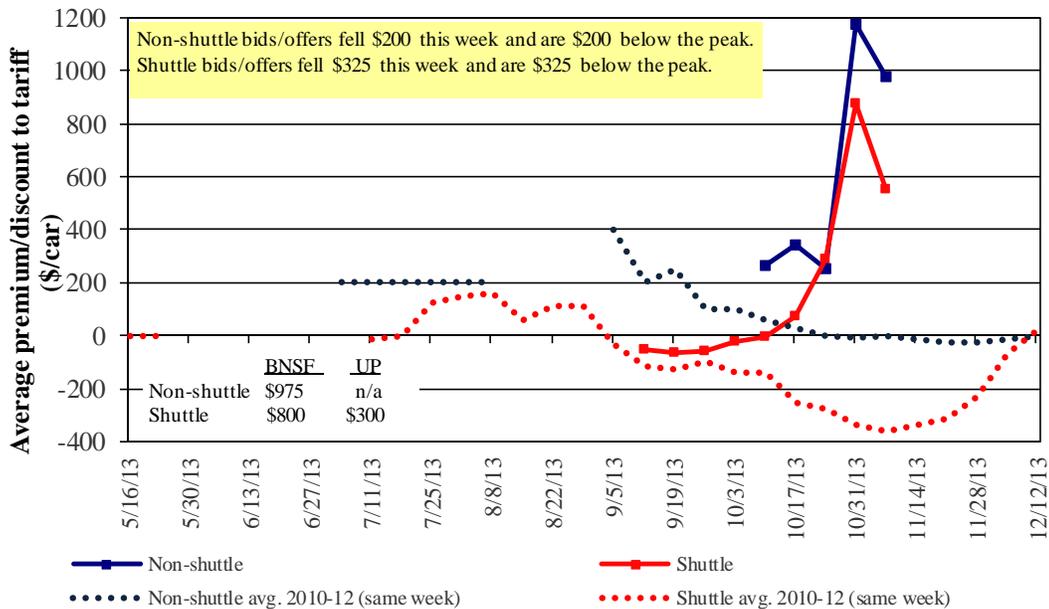


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in December 2013, Secondary Market**

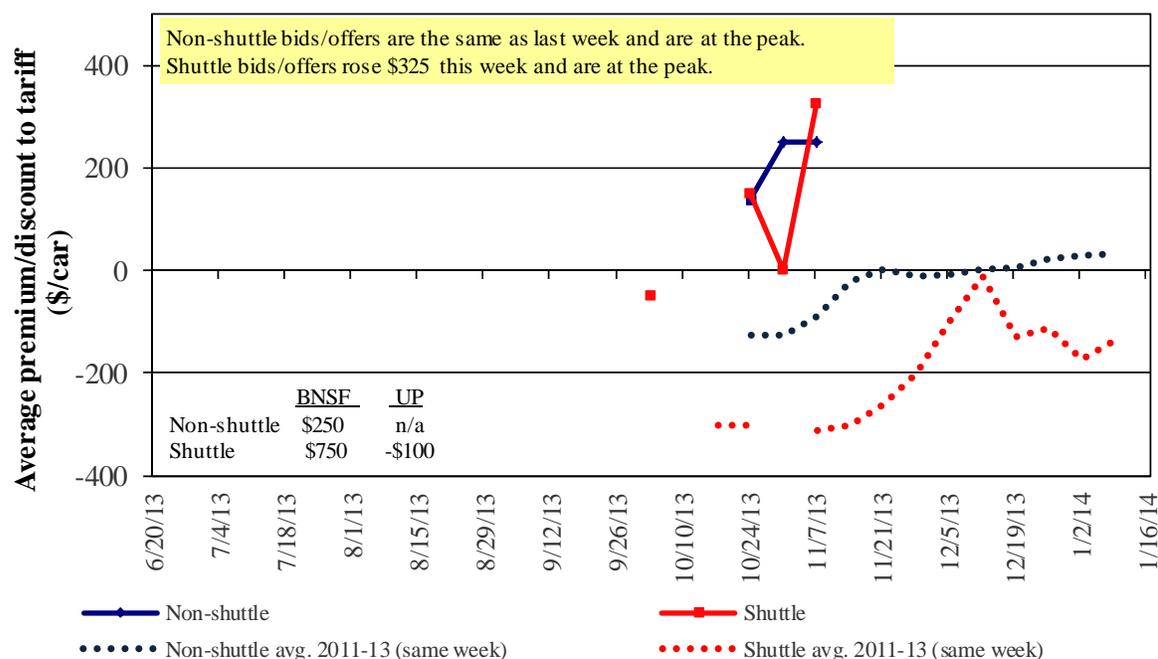


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

### Bids/Offers for Railcars to be Delivered in January 2014, Secondary Market



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

### Weekly Secondary Railcar Market (\$/car)<sup>1</sup>

Week ending	Delivery period					
	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14
<b>Non-shuttle</b>						
BNSF-GF	700	975	250	n/a	n/a	n/a
Change from last week	(917)	(200)	-	n/a	n/a	n/a
Change from same week 2012	711	975	n/a	n/a	n/a	n/a
UP-Pool	350	n/a	n/a	n/a	n/a	n/a
Change from last week	150	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	350	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	1,750	800	750	n/a	n/a	n/a
Change from last week	(767)	(700)	n/a	n/a	n/a	n/a
Change from same week 2012	1,963	1,025	n/a	n/a	n/a	n/a
UP-Pool	500	300	(100)	n/a	n/a	n/a
Change from last week	(375)	50	(100)	n/a	n/a	n/a
Change from same week 2012	775	663	88	n/a	n/a	n/a

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

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

Data from James B. Joiner Co., Tradewest Brokerage Co.

Table 7

**Tariff Rail Rates for Unit and Shuttle Train Shipments<sup>1</sup>**

Effective date:				Fuel	Tariff plus surcharge per:		Percent
11/1/2013	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushe <sup>l</sup> <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$192	\$33.60	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$110	\$36.80	\$1.00	4
	Wichita, KS	Los Angeles, CA	\$6,244	\$566	\$67.63	\$1.84	2
	Wichita, KS	New Orleans, LA	\$3,808	\$338	\$41.17	\$1.12	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$465	\$62.45	\$1.70	3
	Northwest KS	Galveston-Houston, TX	\$4,076	\$371	\$44.16	\$1.20	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$516	\$47.57	\$1.29	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$382	\$35.49	\$0.90	1
	Toledo, OH	Raleigh, NC	\$4,686	\$433	\$50.83	\$1.29	3
	Des Moines, IA	Davenport, IA	\$2,078	\$81	\$21.44	\$0.54	3
	Indianapolis, IN	Atlanta, GA	\$4,061	\$325	\$43.56	\$1.11	3
	Indianapolis, IN	Knoxville, TN	\$3,469	\$209	\$36.52	\$0.93	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$238	\$34.32	\$0.87	1
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,215	\$693	\$58.67	\$1.49	2
	Minneapolis, MN	New Orleans, LA	\$3,459	\$417	\$38.49	\$1.05	1
	Toledo, OH	Huntsville, AL	\$3,687	\$308	\$39.67	\$1.08	2
	Indianapolis, IN	Raleigh, NC	\$4,756	\$436	\$51.56	\$1.40	3
	Indianapolis, IN	Huntsville, AL	\$3,379	\$209	\$35.63	\$0.97	3
Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$382	\$41.02	\$1.12	3	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$326	\$39.76	\$1.08	4
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$253	\$40.23	\$1.09	3
	Chicago, IL	Albany, NY	\$3,950	\$406	\$43.26	\$1.18	3
	Grand Forks, ND	Portland, OR	\$5,159	\$562	\$56.82	\$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$586	\$66.23	\$1.80	1
	Northwest KS	Portland, OR	\$5,043	\$608	\$56.11	\$1.53	4
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$685	\$56.45	\$1.43	2
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$627	\$55.48	\$1.41	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$382	\$33.70	\$0.86	4
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$366	\$38.49	\$0.98	4
	Des Moines, IA	Amarillo, TX	\$3,590	\$299	\$38.62	\$0.98	4
	Minneapolis, MN	Tacoma, WA	\$5,000	\$679	\$56.40	\$1.43	2
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,400	\$703	\$50.67	\$1.29	2
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$627	\$61.04	\$1.66	2
	Minneapolis, MN	Portland, OR	\$5,530	\$685	\$61.72	\$1.68	2
	Fargo, ND	Tacoma, WA	\$5,430	\$558	\$59.46	\$1.62	2
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$441	\$45.84	\$1.25	6
	Toledo, OH	Huntsville, AL	\$2,862	\$308	\$31.47	\$0.86	3
Grand Island, NE	Portland, OR	\$5,110	\$622	\$56.92	\$1.55	2	

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

75-120 cars that meet railroad efficiency requirements.

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

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

\*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8

**Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico**

Effective date: 11/1/2013

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel		Percent change Y/Y <sup>4</sup>	
				surcharge per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup> bushel <sup>3</sup>		
Wheat	MT	Chihuahua, CI	\$6,360	\$595	\$71.06	\$1.93	-17
	OK	Cuautitlan, EM	\$6,357	\$723	\$72.33	\$1.97	-7
	KS	Guadalajara, JA	\$8,293	\$698	\$91.87	\$2.50	9
	TX	Salinas Victoria, NL	\$2,898	\$272	\$32.39	\$0.88	-22
Corn	IA	Guadalajara, JA	\$7,974	\$821	\$89.86	\$2.28	2
	SD	Celaya, GJ	\$7,656	\$778	\$86.18	\$2.19	3
	NE	Queretaro, QA	\$7,317	\$729	\$82.21	\$2.09	1
	SD	Salinas Victoria, NL	\$5,880	\$592	\$66.12	\$1.68	2
	MO	Tlalnepantla, EM	\$6,755	\$709	\$76.26	\$1.94	1
	SD	Torreon, CU	\$6,722	\$652	\$75.34	\$1.91	2
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$693	\$87.46	\$2.38	3
	NE	Guadalajara, JA	\$8,447	\$792	\$94.40	\$2.57	3
	IA	El Castillo, JA	\$8,855	\$774	\$98.38	\$2.67	2
	KS	Torreon, CU	\$6,864	\$491	\$75.15	\$2.04	2
Sorghum	TX	Guadalajara, JA	\$6,764	\$507	\$74.29	\$1.89	1
	NE	Celaya, GJ	\$7,272	\$707	\$81.52	\$2.07	3
	KS	Queretaro, QA	\$7,005	\$444	\$76.11	\$1.93	7
	NE	Salinas Victoria, NL	\$5,628	\$520	\$62.81	\$1.59	7
	NE	Torreon, CU	\$6,328	\$580	\$70.59	\$1.79	3

<sup>1</sup>Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75–110 cars that meet railroad efficiency requirements.

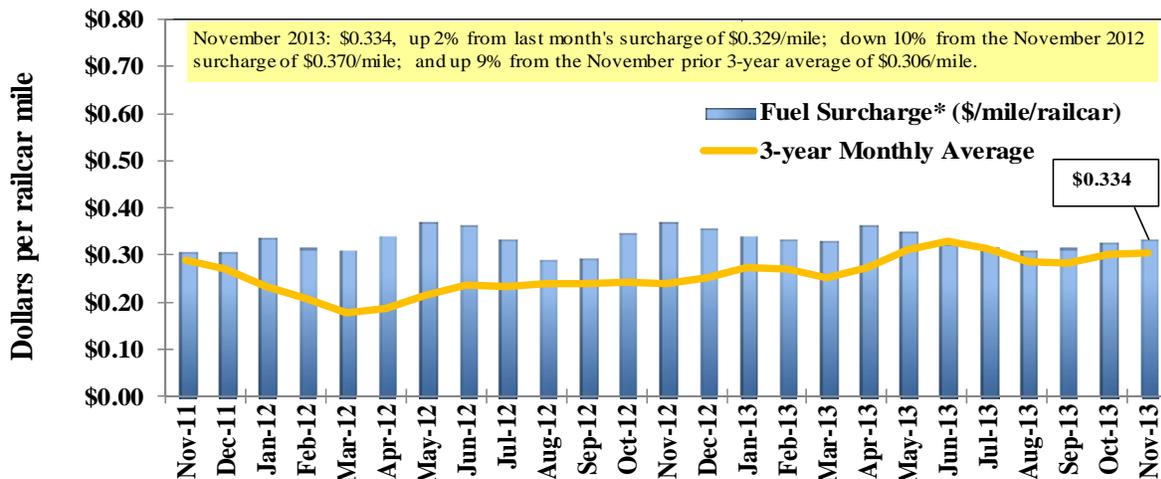
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

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

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

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

**Railroad Fuel Surcharges, North American Weighted Average<sup>1</sup>**

<sup>1</sup> Weighted by each Class I railroad's proportion of grain traffic for the prior year.

\* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

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

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

# Barge Transportation

Figure 8

## Illinois River Barge Freight Rate<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	11/12/2013	475	537	692	600	750	750	567
	11/5/2013	503	547	583	540	575	575	457
<b>\$/ton</b>	11/12/2013	29.40	28.57	32.11	23.94	35.18	30.30	17.80
	11/5/2013	31.14	29.10	27.05	21.55	26.97	23.23	14.35
<b>Current week % change from the same week:</b>								
	Last year	-14	-4	30	20	80	80	48
	3-year avg. <sup>2</sup>	-14	6	40	32	62	62	43
<b>Rate<sup>1</sup></b>	December	--	--	505	395	475	475	348
	February	--	--	467	367	383	430	320

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

### Calculating barge rate per ton:

(Index \* 1976 tariff benchmark rate per ton)/100

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 9).

Figure 9

### Benchmark tariff rates

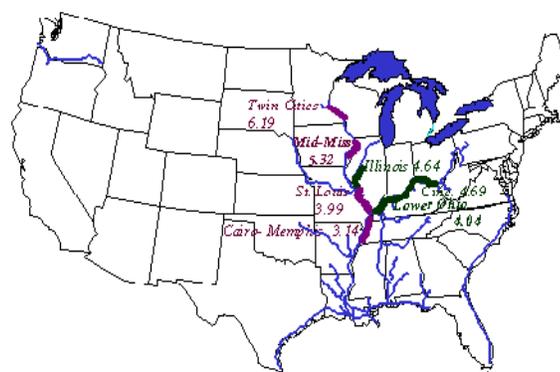
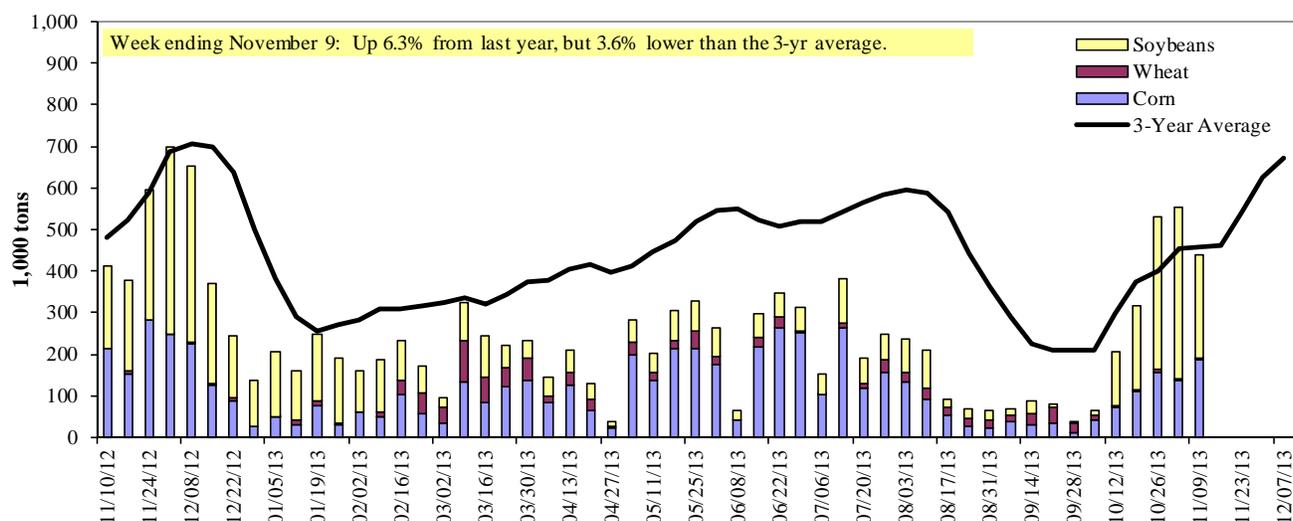


Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

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

Week ending 11/9/2013	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	19	0	89	0	108
Winfield, MO (L25)	82	6	165	3	256
Alton, IL (L26)	184	6	230	3	423
Granite City, IL (L27)	185	6	249	3	444
<b>Illinois River (L8)</b>	68	0	53	0	121
<b>Ohio River (L52)</b>	122	2	186	8	317
<b>Arkansas River (L1)</b>	0	6	24	0	29
Weekly total - 2013	308	14	458	11	791
Weekly total - 2012	234	10	407	8	660
2013 YTD <sup>1</sup>	7,250	3,962	7,008	199	18,419
2012 YTD	13,352	1,670	9,864	224	25,110
2013 as % of 2012 YTD	54	237	71	89	73
Last 4 weeks as % of 2012 <sup>2</sup>	132	119	115	201	121
<b>Total 2012</b>	<b>14,837</b>	<b>1,794</b>	<b>12,663</b>	<b>229</b>	<b>29,523</b>

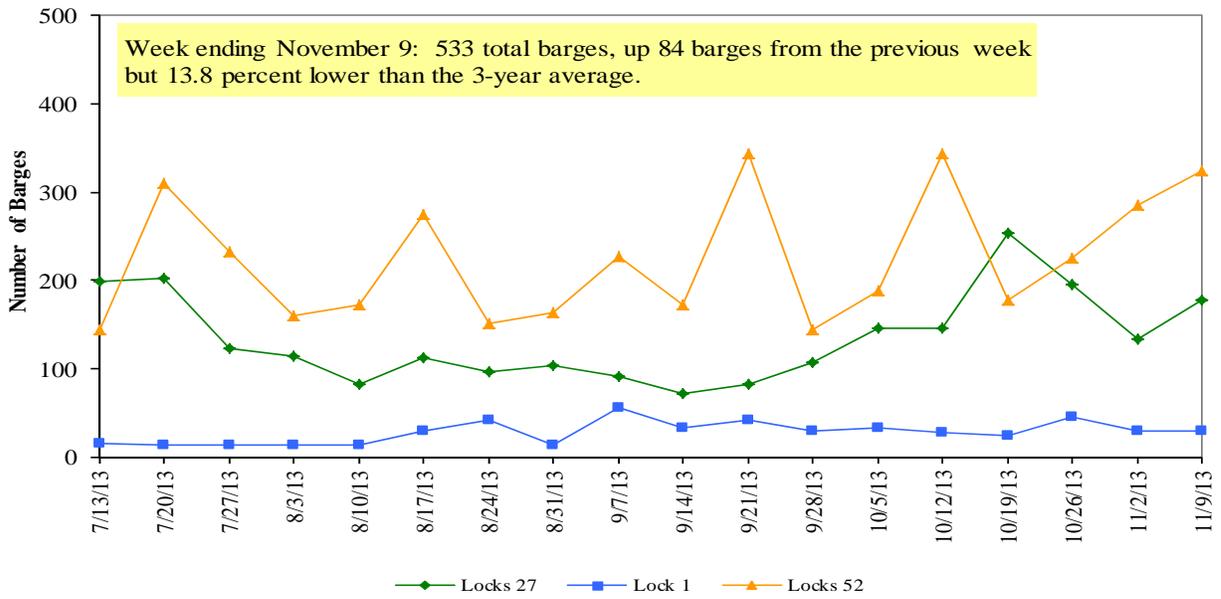
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

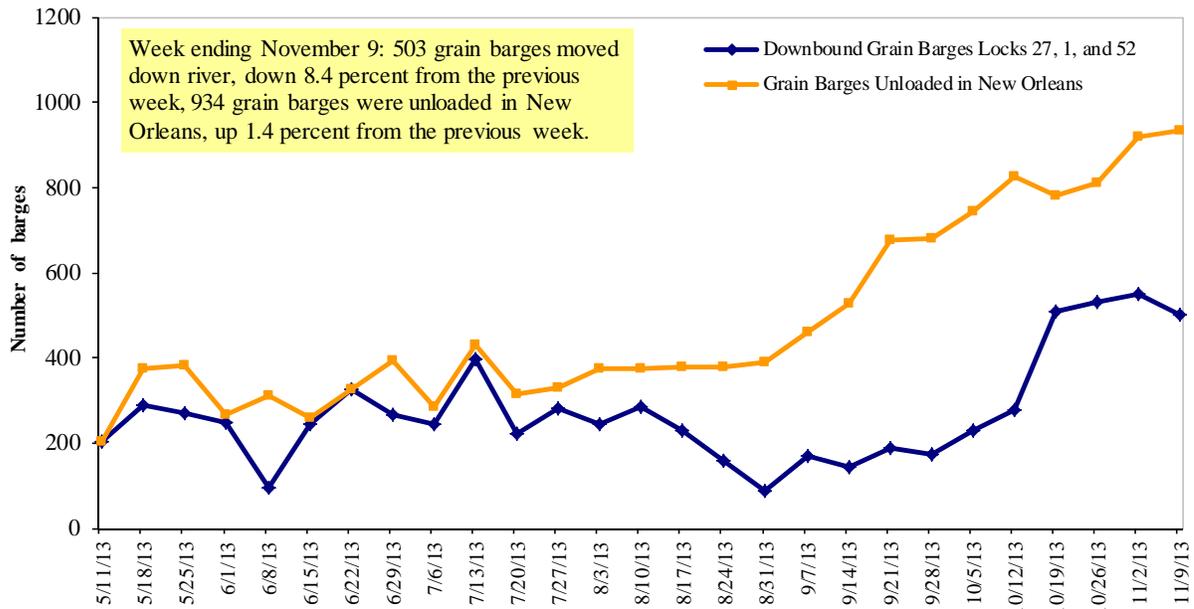
Source: U.S. Army Corps of Engineers

**Figure 11**  
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52**



Source: U.S. Army Corps of Engineers

**Figure 12**  
**Grain Barges for Export in New Orleans Region**



Source: U.S. Army Corps of Engineers and GIPSA

# Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

## Retail on-Highway Diesel Prices<sup>1</sup>, Week Ending 11/11/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.855	-0.023	-0.182
	New England	3.991	-0.017	-0.207
	Central Atlantic	3.903	-0.035	-0.262
	Lower Atlantic	3.793	-0.015	-0.119
II	Midwest <sup>2</sup>	3.798	-0.028	-0.110
III	Gulf Coast <sup>3</sup>	3.752	-0.017	-0.123
IV	Rocky Mountain	3.836	-0.021	-0.268
V	West Coast	3.976	-0.039	-0.155
	West Coast less California	3.881	-0.042	-0.217
	California	4.055	-0.037	-0.105
Total	U.S.	3.832	-0.025	-0.148

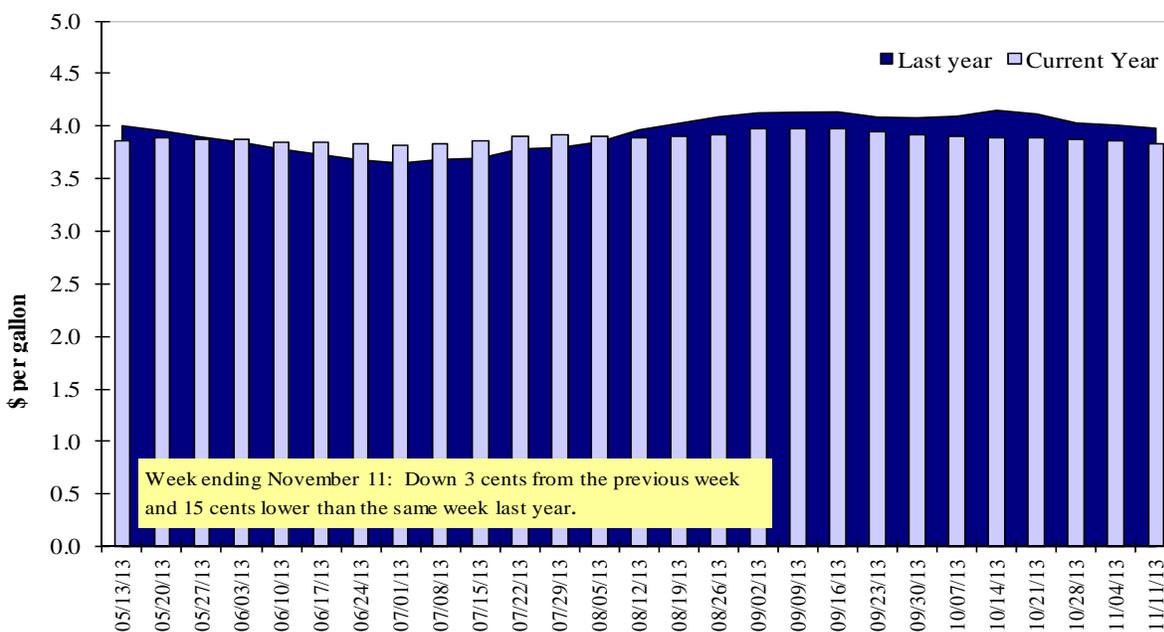
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>Same as South Central

Source: Energy Information Administration/U.S. Department of Energy ([www.eia.doe.gov](http://www.eia.doe.gov))

Figure 13

## Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

# Grain Exports

Table 12

## U.S. Export Balances and Cumulative Exports (1,000 metric tons)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
10/31/2013	1,606	1,201	1,390	948	79	5,225	17,114	24,146	46,485
This week year ago	1,424	638	1,220	759	72	4,113	6,957	16,137	27,207
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2013/14 YTD	6,242	4,864	2,568	1,828	181	15,683	5,138	9,002	29,823
2012/13 YTD	4,361	1,480	2,677	2,014	269	10,802	4,113	9,805	24,720
YTD 2013/14 as % of 2012/13	143	329	96	91	67	145	125	92	121
Last 4 wks as % of same period 2012/13	85	156	81	91	82	96	168	116	127
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254

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

<sup>2</sup> Shipped export sales to date; new marketing year in effect for corn and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA ([www.fas.usda.gov](http://www.fas.usda.gov))

Table 13

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

Week ending 10/31/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,457	3,147	10	7,000
Mexico	6,084	2,745	122	4,370
China	4,659	972	379	2,450
Venezuela	232	194	19	1,158
Taiwan	298	185	61	512
<b>Top 5 Importers</b>	<b>14,729</b>	<b>7,244</b>	<b>103</b>	<b>15,490</b>
<b>Total US corn export sales</b>	<b>22,252</b>	<b>11,068</b>	<b>101</b>	<b>18,670</b>
% of Projected	62%	60%		
Change from prior week	1,719	158		
<b>Top 5 importers' share of U.S. corn export sales</b>	66%	65%		83%
<b>USDA forecast, November 2013</b>	<b>35,620</b>	<b>18,601</b>	<b>91</b>	
<b>Corn Use for Ethanol USDA forecast, November 2013</b>	<b>124,460</b>	<b>118,110</b>	<b>5</b>	

(n) indicates negative number.

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

<sup>2</sup> Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--  
<http://www.fas.usda.gov/esrquery/>

<sup>3</sup> FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://www.fas.usda.gov/export-sales/myfi_rpt.htm) (Carry-over plus Accumulated Exports)

Table 14

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

Week Ending 10/31/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	21,148	15,998	32	21,522
Mexico	1,117	983	14	2,565
Japan	780	710	10	1,751
Indonesia	782	460	70	1,682
Taiwan	758	609	24	1,120
<b>Top 5 importers</b>	<b>24,586</b>	<b>18,761</b>	<b>31</b>	<b>28,641</b>
<b>Total US soybean export sales</b>	<b>33,247</b>	<b>25,942</b>	<b>28</b>	<b>37,060</b>
% of Projected	84%	72%		
Change from prior week	1,018	186		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>74%</b>	<b>72%</b>		
<b>USDA forecast, November 2013</b>	<b>39,510</b>	<b>35,960</b>	<b>10</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esquery/><sup>3</sup>FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://www.fas.usda.gov/export-sales/myfi_rpt.htm). (Carryover plus Accumulated Exports)

Table 15

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

Week Ending 10/31/2013	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2012/13
	2013/14 Current MY	2012/13 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,434	1,963	(27)	3,544
Nigeria	1,568	1,770	(11)	3,002
Mexico	1,994	2,003	(0)	2,761
Philippines	1,177	1,286	(8)	1,965
Egypt	150	58	159	1,678
Korea	833	1,052	(21)	1,385
Taiwan	605	657	(8)	1,038
China	4,028	410	883	743
Brazil	3,149	46	6747	527
Colombia	439	372	18	600
<b>Top 10 importers</b>	<b>15,377</b>	<b>9,615</b>	<b>60</b>	<b>17,243</b>
<b>Total US wheat export sales</b>	<b>20,908</b>	<b>14,915</b>	<b>40</b>	<b>26,348</b>
% of Projected	70%	54%		
Change from prior week	417	210		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>74%</b>	<b>64%</b>		<b>65%</b>
<b>USDA forecast, November 2013</b>	<b>29,940</b>	<b>27,420</b>	<b>9</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - [www.fas.usda.gov](http://www.fas.usda.gov); Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esquery/><sup>3</sup>FAS Marketing Year Final Reports - [www.fas.usda.gov/export-sales/myfi\\_rpt.htm](http://www.fas.usda.gov/export-sales/myfi_rpt.htm).

Table 16

**Grain Inspections for Export by U.S. Port Region (1,000 metric tons)**

Port regions	Week ending 11/07/13	Previous Week <sup>1</sup>	Current Week as % of Previous	2013 YTD <sup>1</sup>	2012 YTD <sup>1</sup>	2013 YTD as % of 2012 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2012
							2012	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	90	130	69	10,276	11,451	90	109	78	12,625
Corn	1	1	110	1,388	5,115	27	6	2	5,512
Soybeans	567	693	82	6,717	8,649	78	159	144	10,347
<b>Total</b>	<b>659</b>	<b>824</b>	<b>80</b>	<b>18,381</b>	<b>25,214</b>	<b>73</b>	<b>140</b>	<b>113</b>	<b>28,484</b>
<b>Mississippi Gulf</b>									
Wheat	115	48	239	9,070	4,973	182	125	126	5,462
Corn	234	517	45	11,854	16,554	72	216	124	18,068
Soybeans	1,256	1,121	112	14,150	18,844	75	102	114	24,684
<b>Total</b>	<b>1,605</b>	<b>1,686</b>	<b>95</b>	<b>35,073</b>	<b>40,371</b>	<b>87</b>	<b>123</b>	<b>118</b>	<b>48,215</b>
<b>Texas Gulf</b>									
Wheat	118	61	193	8,116	5,349	152	153	103	5,912
Corn	0	0	n/a	163	336	49	n/a	0	336
Soybeans	106	114	93	658	449	146	167	163	626
<b>Total</b>	<b>225</b>	<b>175</b>	<b>128</b>	<b>8,937</b>	<b>6,134</b>	<b>146</b>	<b>160</b>	<b>113</b>	<b>6,874</b>
<b>Interior</b>									
Wheat	5	4	129	948	1,091	87	173	45	1,218
Corn	158	223	71	2,951	5,803	51	114	122	6,115
Soybeans	120	145	83	2,685	3,778	71	206	117	4,204
<b>Total</b>	<b>283</b>	<b>372</b>	<b>76</b>	<b>6,584</b>	<b>10,671</b>	<b>62</b>	<b>43</b>	<b>113</b>	<b>11,538</b>
<b>Great Lakes</b>									
Wheat	5	0	n/a	685	436	157	17	14	481
Corn	0	0	n/a	0	56	0	n/a	0	56
Soybeans	64	99	65	392	475	83	148	169	713
<b>Total</b>	<b>69</b>	<b>99</b>	<b>70</b>	<b>1,078</b>	<b>967</b>	<b>111</b>	<b>110</b>	<b>110</b>	<b>1,250</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	641	341	188	n/a	0	341
Corn	32	43	75	223	139	161	2,348	278	143
Soybeans	57	10	552	893	820	109	111	100	1,460
<b>Total</b>	<b>90</b>	<b>54</b>	<b>167</b>	<b>1,757</b>	<b>1,299</b>	<b>135</b>	<b>173</b>	<b>123</b>	<b>1,944</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	333	243	137	29,736	23,640	126	114	89	26,040
Corn	425	784	54	16,579	28,002	59	206	108	30,230
Soybeans	2,172	2,182	100	25,495	33,015	77	122	126	42,035
<b>Total</b>	<b>2,930</b>	<b>3,209</b>	<b>91</b>	<b>71,809</b>	<b>84,657</b>	<b>85</b>	<b>132</b>	<b>116</b>	<b>98,305</b>

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

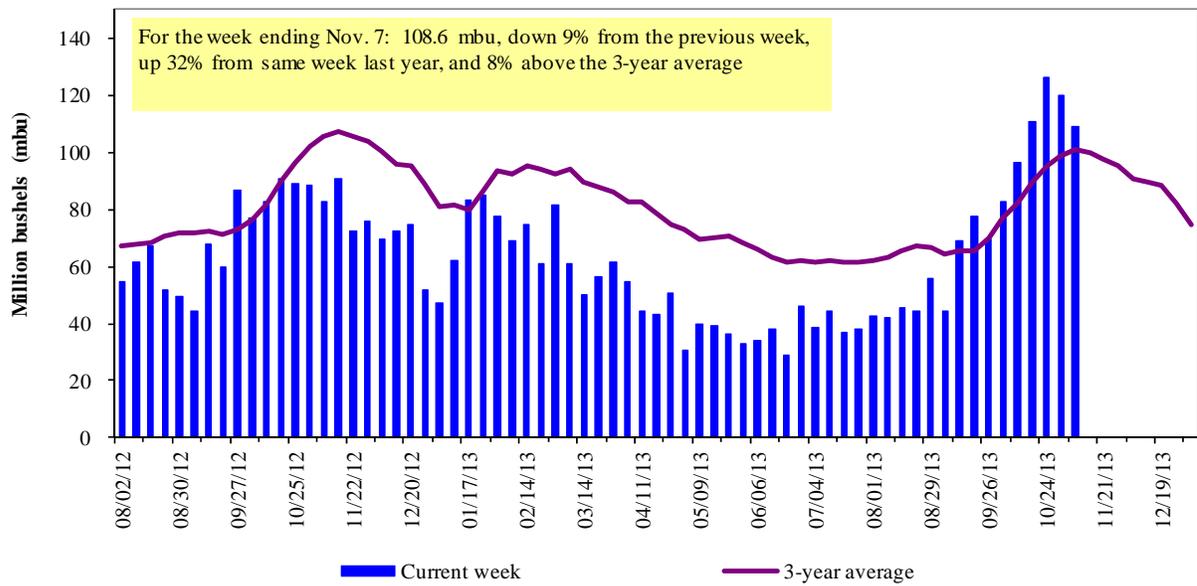
<sup>2</sup> Total includes only port regions shown above; Interior land-based shipments now included.

Source: Grain Inspection, Packers and Stockyards Administration/USDA ([www.gipsa.usda.gov](http://www.gipsa.usda.gov)); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 56 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2012.

Figure 14

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

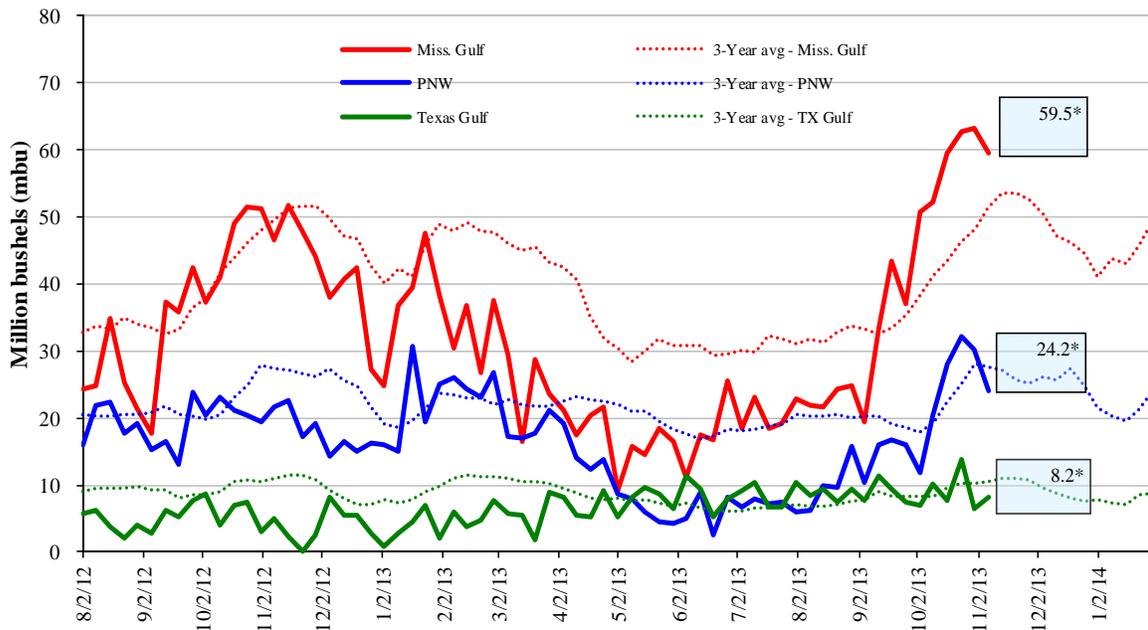


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



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

Nov. 7 : % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	down 6	up 28	down 3	down 20
Last year (same week)	up 28	up 68	up 31	up 12
3-yr avg. (4-wk mov. avg.)	up 15	up 3	up 13	up 2

# Ocean Transportation

Table 17

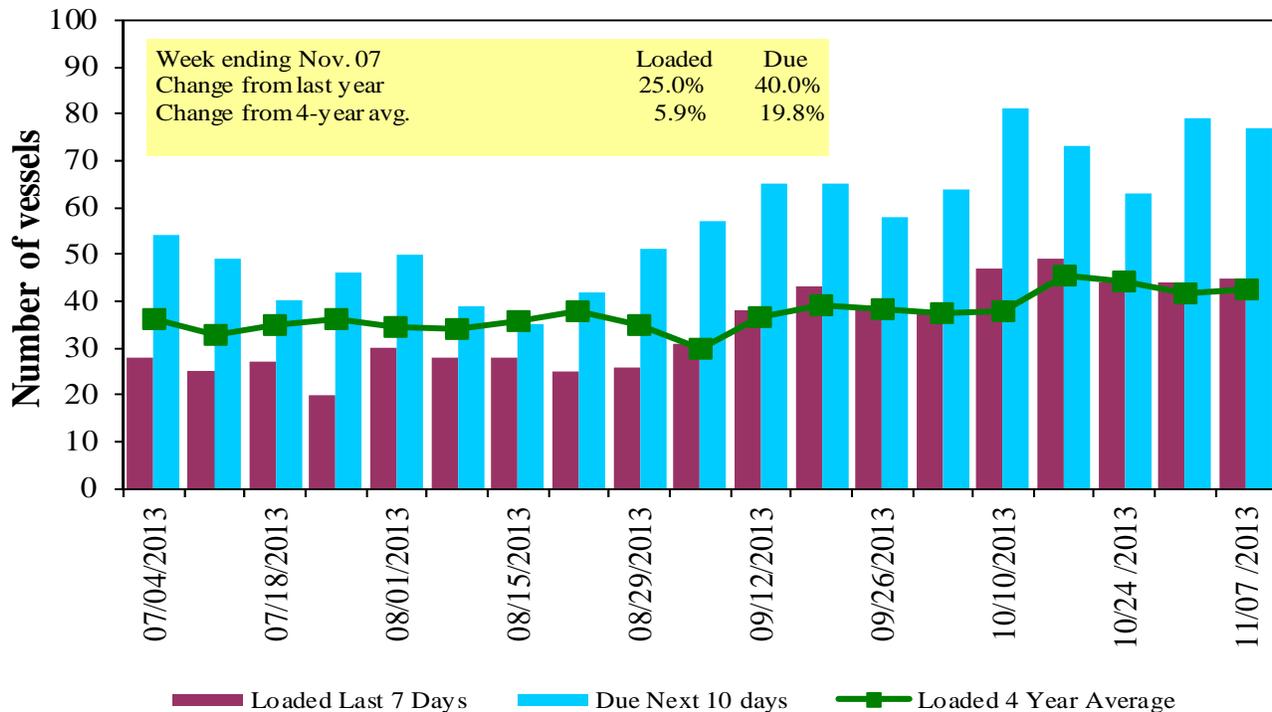
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
11/7/2013	46	45	77	20	n/a
10/31/2013	40	44	79	15	n/a
2012 range	(13..50)	(13..46)	(27..78)	(4..20)	n/a
2012 avg.	28	33	46	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

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

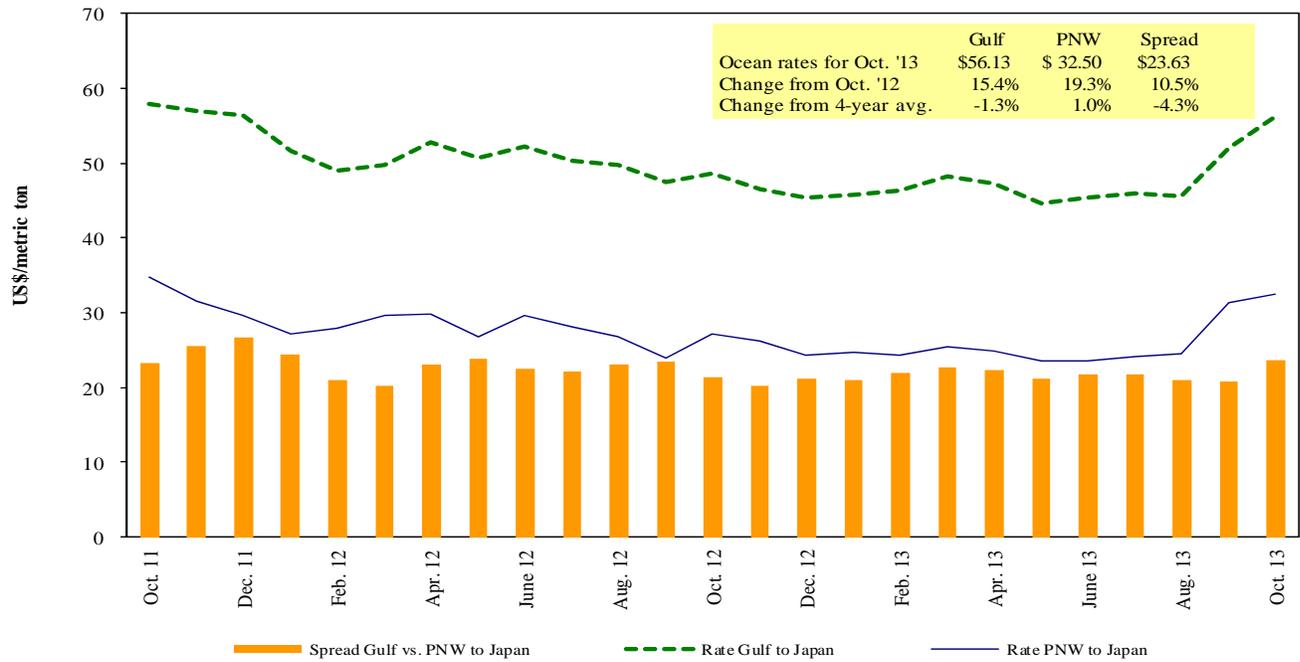


Source: Transportation & Marketing Programs/AMS/USDA

<sup>1</sup>U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

**Grain Vessel Rates, U.S. to Japan**



Source: O'Neil Commodity Consulting

Table 18

**Ocean Freight Rates For Selected Shipments, Week Ending 11/09/2013**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	45.00
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	52.50
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	53.00
U.S. Gulf	China	Heavy Grain	Nov 15/18	55,000	54.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	55,000	53.00
U.S. Gulf	China	Heavy Grain	Nov-Dec	55,000	49.50
U.S. Gulf	China	Heavy Grain	Oct 1/Dec 31	55,000	33.00
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Nov 4/14	23,300	126.92
U.S. Gulf	S. Korea	Heavy Grain	Nov 19/20	60,000	53.50
Brazil	Indonesia	Grain	Sep 29/Oct 4	73,000	29.10
Brazil	Morocco	Corn	Oct 25/Nov 5	29,000	20.50
Brazil	Morocco	Corn	Sep 25/30	30,000	20.00
France	Algeria	Wheat	Sep 20/30	25,000	25.00
France	Algeria	Wheat	Sep 15/25	25,000	23.75
Mexico	Algeria	Wheat	Nov 15/30	55,000	34.00
Ukraine	Italy	Corn	Oct 30/31	25,000	26.00

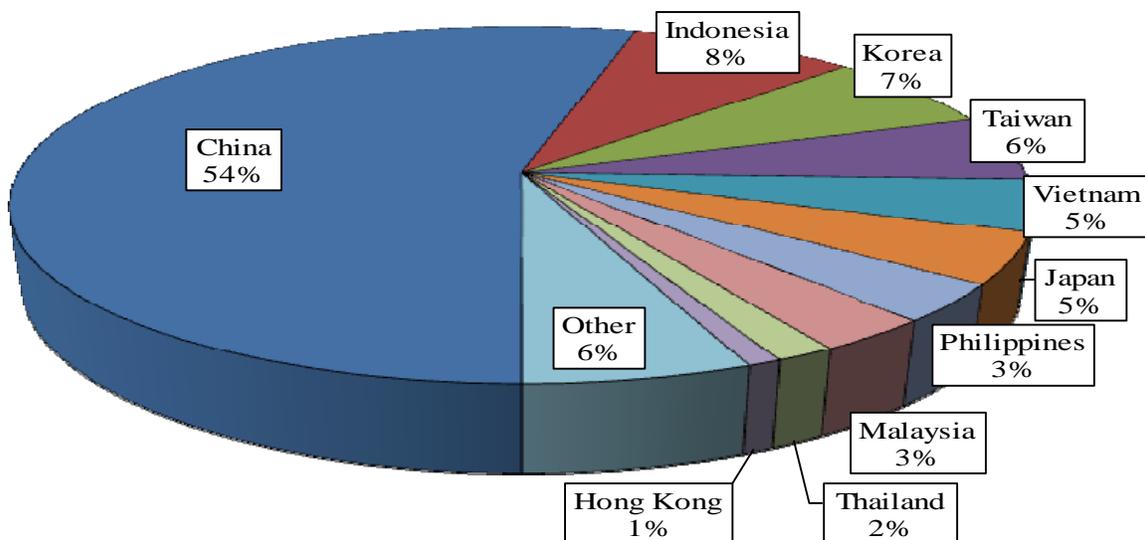
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2012, containers were used to transport 8 percent of total U.S. waterborne grain exports, up 1 percentage point from 2011. Approximately 66 percent of U.S. waterborne grain exports in 2012 went to Asia, of which 11 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—96 percent in 2012.

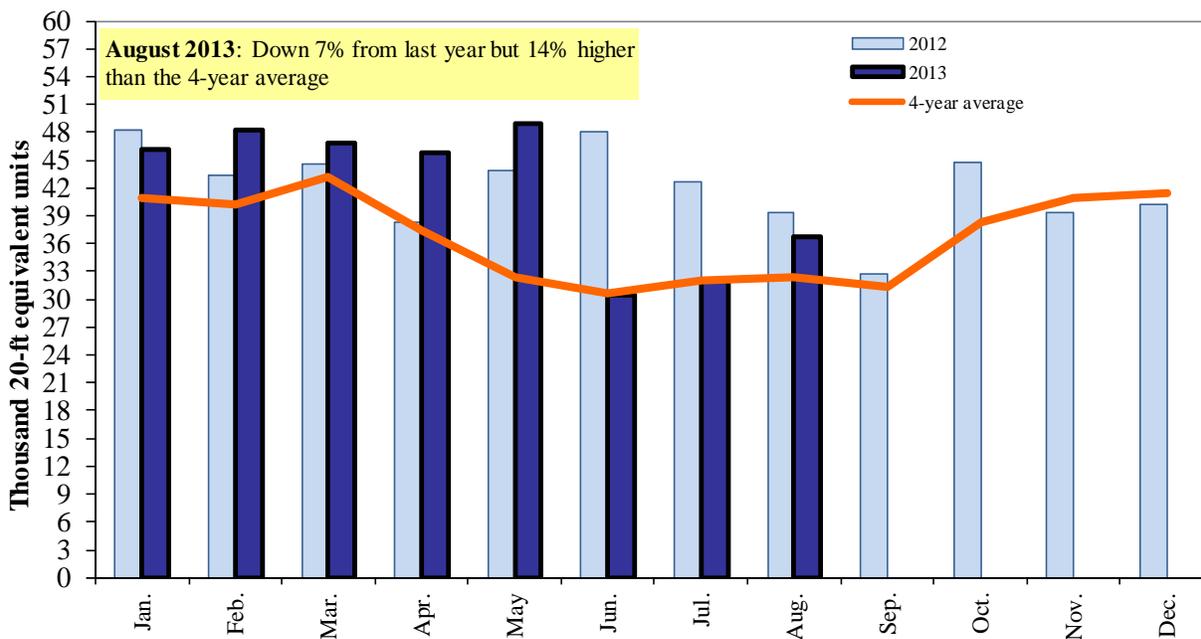
**Figure 18**  
**Top 10 Destination Markets for U.S. Containerized Grain Exports, August 2013**



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

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

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



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

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

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