



# Grain Transportation Report

A weekly publication of the Transportation and Marketing Programs/Transportation Services Division  
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Dec. 12, 2013

## WEEKLY HIGHLIGHTS

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### New Release: Rail's Loss of Grain Transportation Market Share

A new AMS report examines why the share of the grain and oilseed harvest moved by rail has continued to decline since 2001. Passage of the Federal Motor Carrier Act and the Staggers Rail Act in 1980 led to a decline spanning 2 decades during a period of large structural changes in the rail industry. However, even after the last major industry restructuring occurred by 2000, rail's share of grain and oilseed transportation has continued to decline. This report develops a model of the top grain-producing States to investigate which major factors have been responsible. The three most important factors are ethanol production, biodiesel production, and the concentration of animal feeding. Read [the summary](#) or [the full report](#).

### Delays Persist on Rail Network

During the week ending December 5, average December non-shuttle **secondary railcar bids/offers per car** were \$487.50 above tariff, up \$312.50 from last week, and \$487.50 higher than last year. Average shuttle bids/offers were \$1,562.50 per car above tariff, up \$900 from last week and \$1,731.50 higher than last year. The shuttle average reflects the highest bid on record of \$2,825 per car for service on BNSF Railway. This follows the previous record high of \$2,517 for BNSF shuttle service just 5 weeks ago, during the week ending October 31. Service levels appeared to initially improve through the first weeks of November, as BNSF had indicated would happen, after it brought additional locomotives, railcars, and crews on line to address the service issues. However, service levels began falling again in December and bids in the secondary market climbed back to a historic high, indicating a scarcity of grain transportation. BNSF Railway's train velocity has been reduced by delays due to scheduled track maintenance across much of the northern Plains during a period of strong demand for rail service due to the record corn harvest, strong soybean exports, and increased year-over-year shipments of many other commodities.

### Grain Inspections Rebound

For the week ending December 5, **total inspections of grain** (corn, wheat, and soybeans) for export from all major port regions reached 3.14 million metric tons (mmt), up 14 percent from the previous week, 67 percent above last year this time, and 30 percent above the 3-year average. Compared to the previous week, inspections of grain increased in each of the three major export regions. Total corn inspections (1.02 mmt) increased 12 percent, up for the third consecutive week; and wheat (.537 mmt) and soybean (1.58 mmt) inspections increased 27 and 11 percent from the previous week. Total shipments of grain increased to Latin America. Although week-to-week outstanding (unshipped) sales were down for corn, wheat, and soybeans, year-to-date cumulative (shipped) export sales were up from the same time last year.

## Snapshots by Sector

### Rail

U.S. railroads originated 20,625 **carloads of grain** during the week ending November 30, down 8 percent from last week, up 1 percent from last year, and up 3 percent from the 3-year average.

### Barge

Week ending December 7, 488 grain barges **moved down river**, down 13.3 percent from last week; 916 grain barges were **unloaded in New Orleans**, up 9.2 percent from the previous week.

During the week ending December 7, **barge grain movements** totaled 768,750, year—15 percent lower than the previous week and about the same as last year.

### Ocean

During the week ending December 5, 45 **ocean-going grain vessels** were loaded in the Gulf, 10 percent more than the same period last year. Sixty-nine vessels are expected to be loaded within the next 10 days, 44 percent more than the same period last year.

During the week ending December 6, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$57 per mt, up 5 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$30.50 per mt, up 5 percent from the previous week.

### Fuel

During the week ending December 9, U.S. average **diesel fuel price** remained the same from the previous week at \$3.88 per gallon—11 cents lower than the same week last year.

# Feature Article/Calendar

## Record Harvest Poses Transportation Challenge for Rail Service

Agricultural shippers typically impose the heaviest demand on rail transportation following the harvest each year. This has not been an issue in the past 3 years because of the lessened transportation demands resulting from relatively lower production and last year's severe drought. However, a record harvest and additional challenges this year are straining rail network capacity, resulting in shippers paying record-high premiums in the secondary railcar market to secure empty grain cars.

### Background

The harvest season can pose logistical challenges to the transportation system because of the large volume of grain and oilseed needing to be moved during a relatively short period. Adequate transportation and storage capacity is needed during this period to reduce the crop's exposure to fluctuations in temperature and moisture, which can lead to spoilage. Producers, shippers, and transportation providers attempt to plan ahead as best as possible, but unpredictable weather ultimately dictates the length and timing of the growing and harvest seasons as well as yields.

The size of the combined 2013 harvest for corn, soybeans, and wheat set a new production record at over 19 billion bushels, led by a record corn harvest at almost 14 billion bushels. Based on the initial outlook, this year's bumper crop was unexpected because of late planting due to rain delays. Yet, favorable weather and a later-than-usual frost extended the growing season into October, allowing the corn crop to reach full maturity with a record production. However, the late maturity of the crops compressed the harvest window, giving transportation service providers more grain and oilseeds to move and less time to move it.

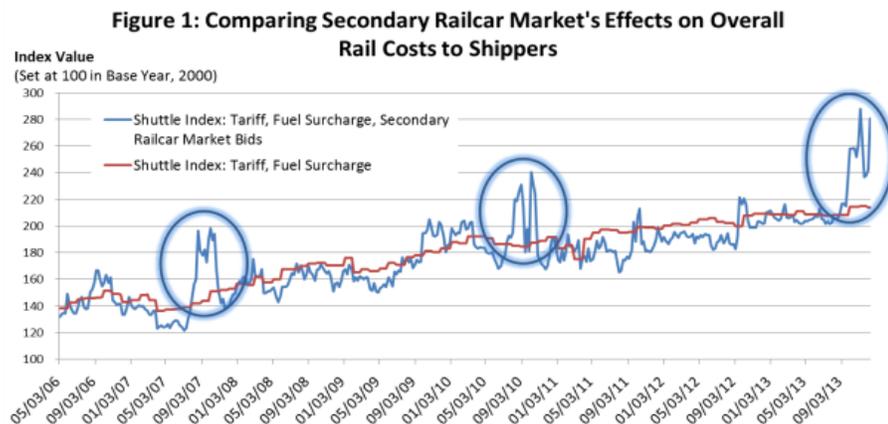
### Rail Service Issues

BNSF Railway's scheduled track work between the Midwest and the Pacific Northwest compounded this issue for rail service, leading to service delays and the inability of shippers to secure enough empty grain cars to transport the harvest. Bids in both the shuttle and non-shuttle secondary railcar markets for securing empty railcars have been trading at large premiums since October, indicating high shipper demand and limited transportation capacity. Driving this year's premiums are the bids for BNSF shuttle service, which have been trading at record highs—\$2,517 per car during the week ending October 31 and \$2,825 for the most recent week. This year's high premiums come as quite a contrast to last year's activity in the secondary railcar market, when empty railcars traded at a loss in the face of low, drought-affected demand.

Figure 1 graphs the shuttle train index from Table 1 to show how recent activity in the secondary railcar market has affected the prices shippers are paying to transport grain by rail for BNSF and Union Pacific. The red line is the shuttle train index including only monthly tariff and fuel surcharge data while the blue line also includes weekly bids from the secondary railcar market. Since 2006, these two lines have moved together for a majority of the time, indicating that costs

associated with the secondary railcar market have only played a minor role in the overall price paid to ship grain by rail. For the most part, the tariff rate and fuel surcharge have been priced adequately by the railroads to balance railcar supply and demand.

However, there have been three major events leading to large differences between the two indexes as depicted in the graph: a record year for grain production and exports in 2007, the Russian grain export ban in 2010, and this year's record harvest coupled with rail service issues.



In these three events, demand for rail service unexpectedly surged beyond the rail carriers' previous forecasts. This led to high premiums in the secondary railcar market above the tariff prices set by the rail carriers as shippers bid for and traded scarce space among themselves. When adjusted for inflation, the most recent weekly bid for BNSF rail service exceeded the highest bids by \$316 per car in 2010 and by \$566 in 2007, showing that the current imbalance between grain rail service demand and supply is the most severe yet.<sup>1</sup>

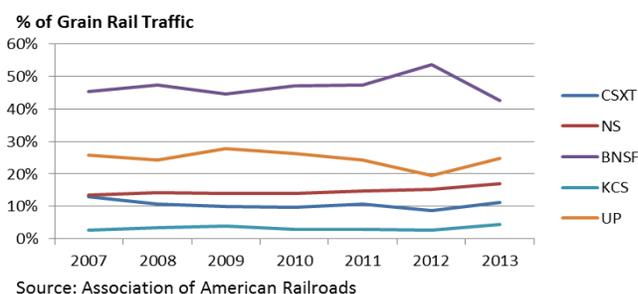
Bids were at \$1,500 in the secondary railcar market for December delivery of BNSF shuttle service the week ending October 31, but dropped to \$317 over the following two weeks after BNSF announced it was deploying additional personnel, railcars, and locomotives to address service issues. However, bids have climbed back steadily over the past 3 weeks, indicating that service issues are still ongoing.

### Rail Grain Traffic Patterns

Bids for Union Pacific service have also risen as a result of the high demand and additional traffic from shippers unable to secure space on BNSF. In fact, weekly grain carloadings indicate that Kansas City Southern, CSX, and Norfolk Southern are also experiencing higher than normal grain traffic due to BNSF's service issues.

Comparing each carrier's share of grain transported by rail over the past 9 weeks with the same period in prior years shows that, although BNSF's share is down this year, the other carriers' shares have increased (Figure 2).

**Figure 2: Percentage of Grain Transported by Rail by Carrier, Weeks 40 - 48**



### Harvest Effects on Barge and Ocean Transportation

Due to last year's drought, overall weekly barge traffic in 2013 had been well below the 5-year average until traffic started increasing in late October with movements of new crop. During the past 9 weeks, average weekly barge grain movements have been 748,000 tons, the highest average for the same period since they reached 845,000 tons in 2007.<sup>2</sup> In general, barge rates have been somewhat higher than the 3-year average, but below the highs of last year's rates when navigation was severely restricted due to the drought. While the barge supply appears to be sufficient for the increased demand with all other things being equal, more barges are currently needed to move the same amount of grain as barge companies continue to contend with low water conditions that reduce the cargo capacity of barges. This coupled with bumper crops is tightening barge capacity and is likely contributing to higher rates. Weekly ocean-going grain vessels loaded in the Gulf have averaged 47 during the past 9 weeks, higher than in the past two years, but below the average in 2010 at 49 and in 2007 at 53. However, ongoing demand at the ports is as strong as it has been in years. The 9-week average of grain vessels expected to be loaded within the next 10 days is 73, the second highest in 9 years, surpassed only by the level of 75 vessels waiting in 2007. There are also limited anecdotal indications that trucks may be harder to find this year, as driver shortages begin to surface with the strain of the large harvest.

### Conclusion

Overall, total weekly grain carloadings among the major U.S. carriers have averaged 22,497 during the past 9-week period, down from 25,006 in 2010 and 26,767 in 2007. Possibly, this is a reflection of the long-term trend of rail losing market share to truck in the transportation of grain. However, it could also indicate that weekly grain carloadings will be higher than usual over the next several weeks as there is much more grain to be moved by rail, as the record harvest slowly works its way through the transportation network. [Adam.Sparger@ams.usda.gov](mailto:Adam.Sparger@ams.usda.gov)

<sup>1</sup> Adjusted for inflation using the Bureau of Labor Statistics' Producer Price Index for Freight Rail Transportation (Carload).

<sup>2</sup> As measured by downbound tonnages at Mississippi River Locks 27, Ohio River Locks and Dam 52, and Arkansas River Lock and Dam 1. Data is provided by the U.S. Army Corps of Engineers.

# Grain Transportation Indicators

Table 1

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

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
12/11/13	260	266	281	299	255	216
12/04/13	261	249	242	301	244	206

<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	12/6/2013	11/29/2013
Corn	IL--Gulf	-0.89	n/a
Corn	NE--Gulf	-0.93	n/a
Soybean	IA--Gulf	-1.45	n/a
HRW	KS--Gulf	-1.65	n/a
HRS	ND--Portland	-2.14	n/a

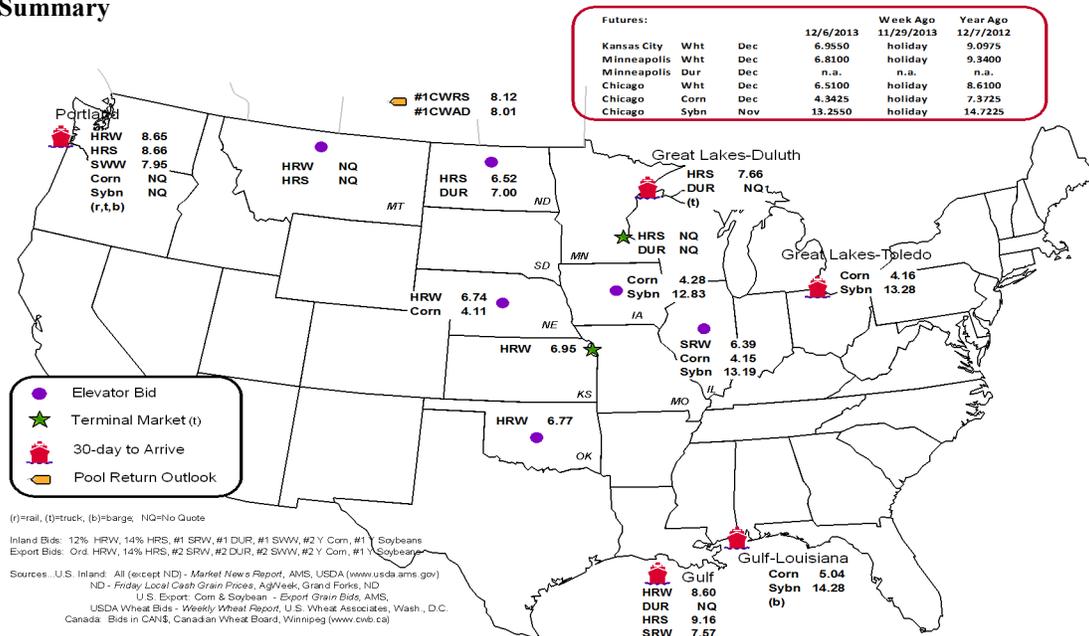
Note: nq = no quote

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
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico <sup>3</sup>
12/04/2013 <sup>p</sup>	1,448	1,065	5,068	1,328	8,909	11/30/13	1,884
11/27/2013 <sup>r</sup>	2,001	1,648	6,480	1,211	11,340	11/23/13	1,420
2013 YTD <sup>r</sup>	27,155	68,383	153,470	22,139	271,147	2013 YTD	65,384
2012 YTD <sup>r</sup>	18,727	38,773	188,637	21,919	268,056	2012 YTD	88,551
2013 YTD as % of 2012 YTD	145	176	81	101	101	% change YTD	74
Last 4 weeks as % of 2012 <sup>2</sup>	174	167	170	124	163	Last 4wks % 2012	142
Last 4 weeks as % of 4-year avg. <sup>2</sup>	175	78	166	127	144	Last 4wks % 4 yr	123
Total 2012	22,604	40,780	199,419	46,798	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.

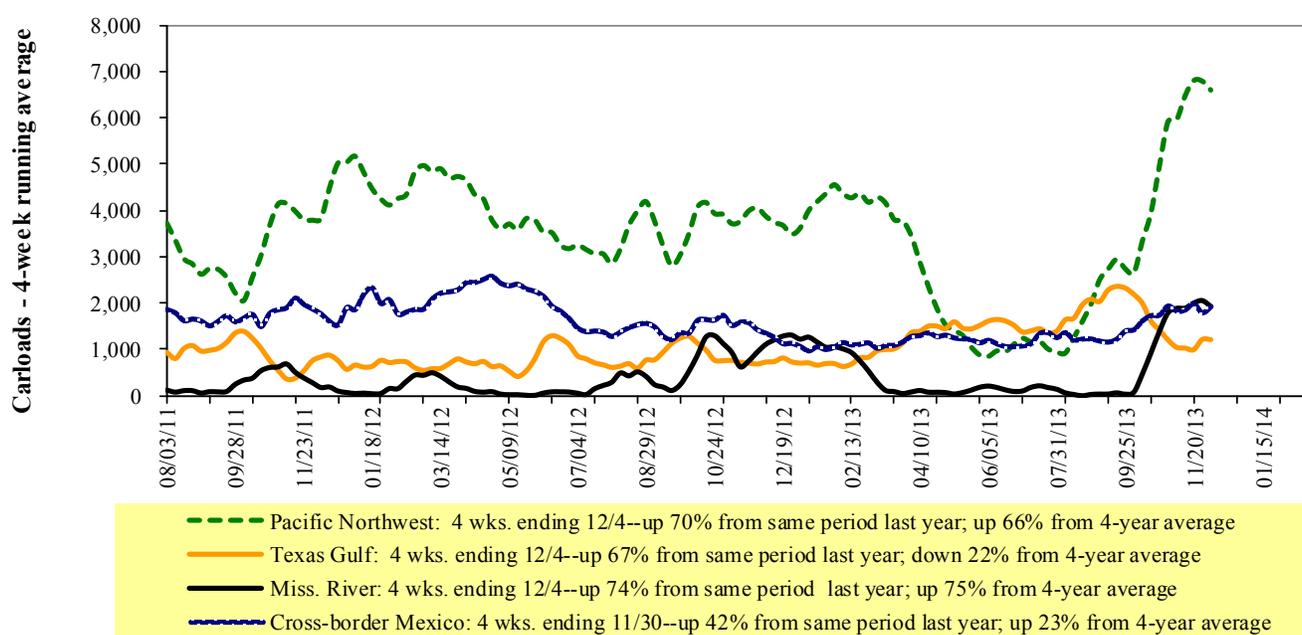
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

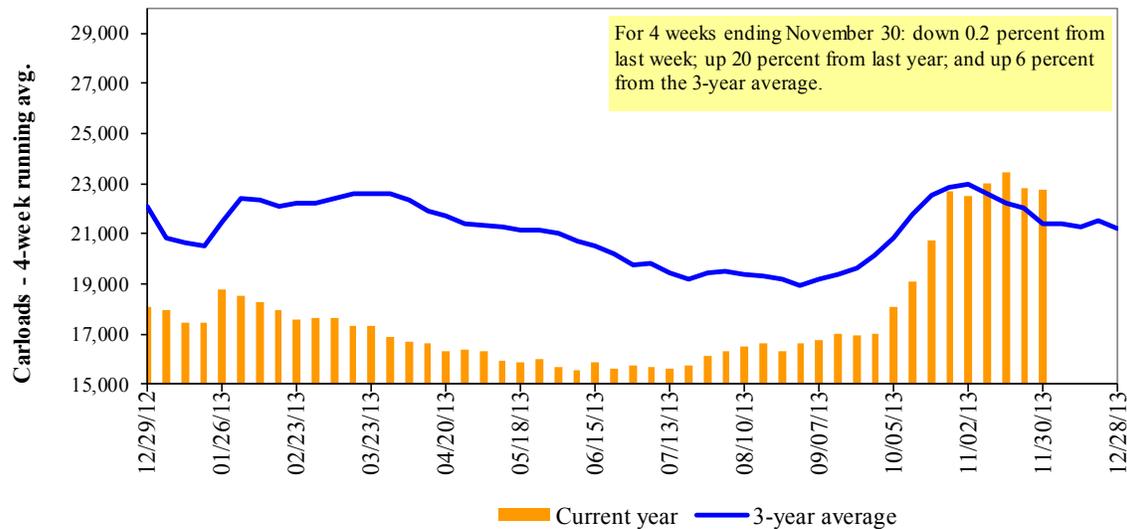
Table 4

**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
11/30/13	2,304	2,611	9,238	197	6,275	20,625	5,296	5,249
This week last year	1,776	2,905	10,813	649	4,211	20,354	3,616	5,824
2013 YTD	77,372	124,939	421,094	30,617	200,833	854,855	173,991	253,654
2012 YTD	79,356	134,545	477,166	25,071	228,811	944,949	188,204	242,345
2013 YTD as % of 2012 YTD	97	93	88	122	88	90	92	105
Last 4 weeks as % of 2012	150	128	96	132	160	120	128	101
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	120	121	89	141	122	106	130	108
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							
	Dec-13	Dec-12	Jan-14	Jan-13	Feb-14	Feb-13	Mar-14	Mar-13
BNSF <sup>3</sup>								
COT grain units	no offer	1	no offer	0	no offer	no bids	257	no bids
COT grain single-car <sup>5</sup>	no offer	1 . . 10	no offer	0 . . 1	no offer	0 . . 1	1 . . 82	0 . . 1
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.

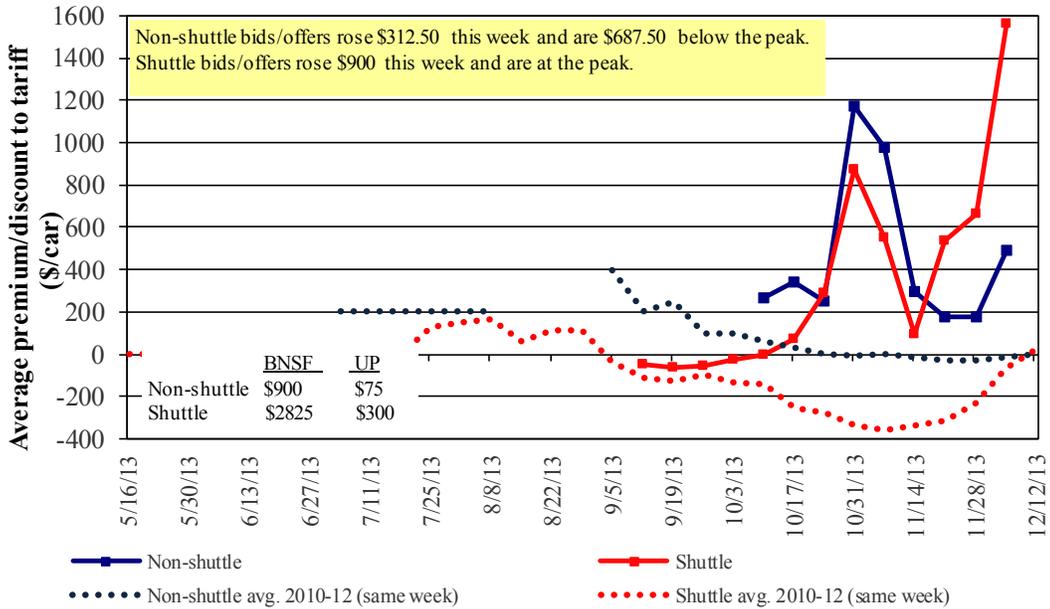
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

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 December 2013, Secondary Market**

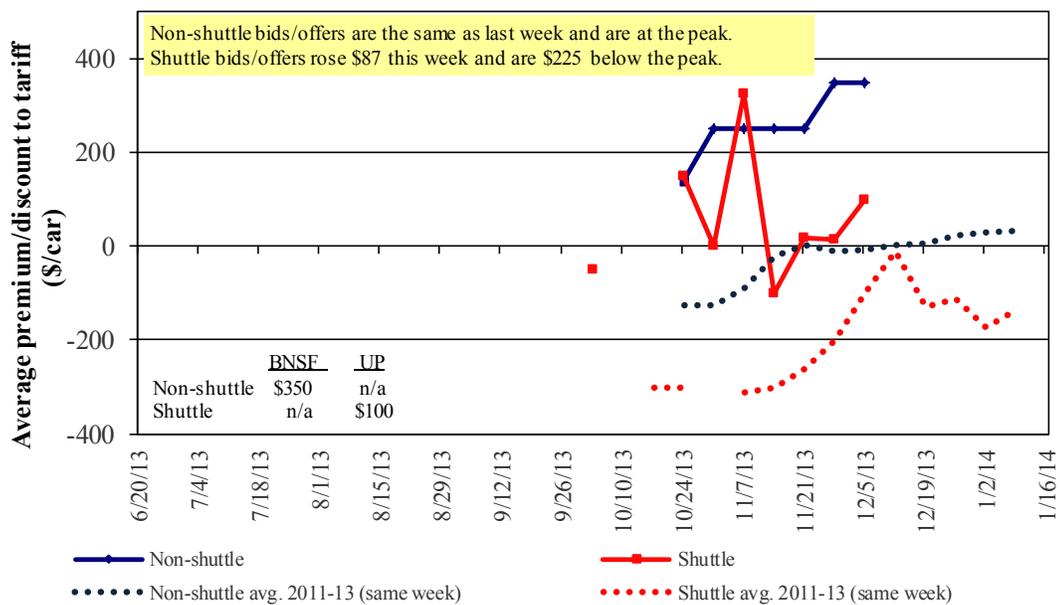


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

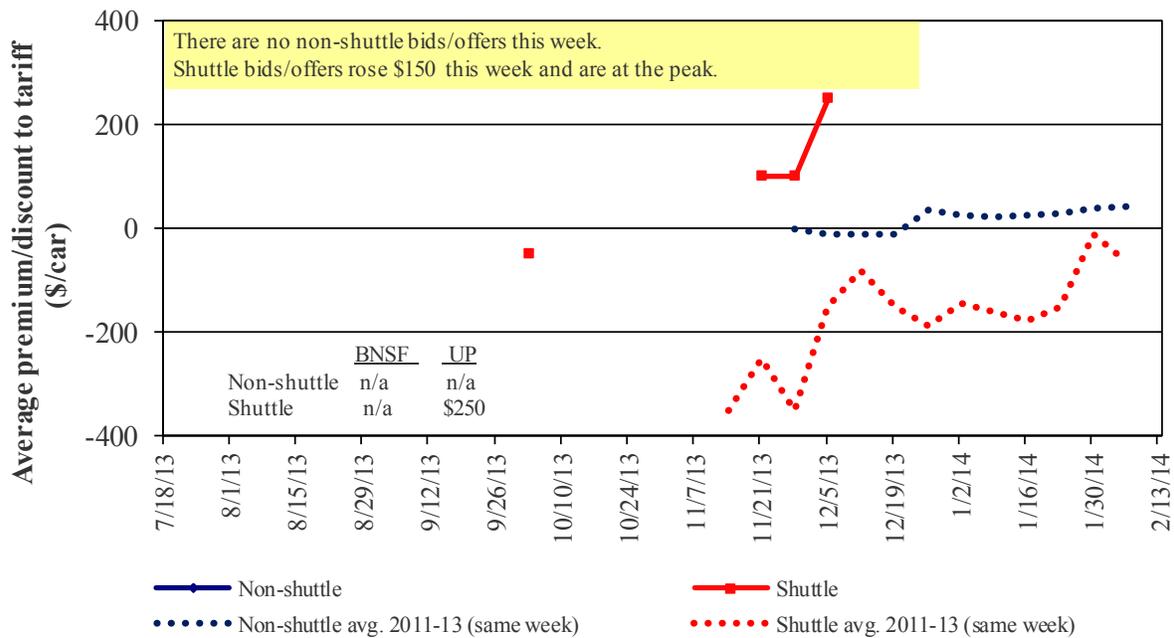


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in February 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					
	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
<b>Non-shuttle</b>						
BNSF-GF	900	350	n/a	200	n/a	n/a
Change from last week	600	-	n/a	n/a	n/a	n/a
Change from same week 2012	n/a	325	n/a	n/a	n/a	n/a
UP-Pool	75	n/a	n/a	n/a	n/a	n/a
Change from last week	25	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	75	n/a	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	2,825	n/a	n/a	n/a	n/a	n/a
Change from last week	1,550	n/a	n/a	n/a	n/a	n/a
Change from same week 2012	3,050	n/a	n/a	n/a	n/a	n/a
UP-Pool	300	100	250	150	(100)	(100)
Change from last week	250	87	150	150	-	-
Change from same week 2012	413	150	300	250	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:						Percent	
12/1/2013	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		change Y/Y <sup>3</sup>
					metric ton	bushe <sup>l</sup> <sup>2</sup>	
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,191	\$182	\$33.50	\$0.91	1
	Grand Forks, ND	Duluth-Superior, MN	\$3,596	\$104	\$36.75	\$1.00	4
	Wichita, KS	Los Angeles, CA	\$6,244	\$536	\$67.32	\$1.83	2
	Wichita, KS	New Orleans, LA	\$3,808	\$320	\$41.00	\$1.12	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,824	\$440	\$62.20	\$1.69	3
	Northwest KS	Galveston-Houston, TX	\$4,076	\$351	\$43.96	\$1.20	3
	Amarillo, TX	Los Angeles, CA	\$4,275	\$489	\$47.30	\$1.29	2
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,192	\$362	\$35.29	\$0.90	1
	Toledo, OH	Raleigh, NC	\$4,686	\$416	\$50.66	\$1.29	3
	Des Moines, IA	Davenport, IA	\$2,078	\$77	\$21.40	\$0.54	3
	Indianapolis, IN	Atlanta, GA	\$4,061	\$312	\$43.43	\$1.10	3
	Indianapolis, IN	Knoxville, TN	\$3,469	\$200	\$36.44	\$0.93	3
	Des Moines, IA	Little Rock, AR	\$3,218	\$225	\$34.19	\$0.87	1
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,215	\$656	\$58.30	\$1.48	1
	Minneapolis, MN	New Orleans, LA	\$3,599	\$395	\$39.66	\$1.08	1
	Toledo, OH	Huntsville, AL	\$3,687	\$295	\$39.55	\$1.08	2
	Indianapolis, IN	Raleigh, NC	\$4,756	\$419	\$51.39	\$1.40	3
	Indianapolis, IN	Huntsville, AL	\$3,379	\$200	\$35.54	\$0.97	3
Champaign-Urbana, IL	New Orleans, LA	\$3,748	\$362	\$40.82	\$1.11	3	
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,678	\$308	\$39.58	\$1.08	4
	Wichita, KS	Galveston-Houston, TX	\$3,798	\$240	\$40.10	\$1.09	3
	Chicago, IL	Albany, NY	\$3,950	\$390	\$43.10	\$1.17	3
	Grand Forks, ND	Portland, OR	\$5,159	\$532	\$56.51	\$1.54	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,084	\$554	\$65.92	\$1.79	0
	Northwest KS	Portland, OR	\$5,043	\$576	\$55.80	\$1.52	3
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$648	\$56.09	\$1.42	2
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$593	\$55.15	\$1.40	2
	Champaign-Urbana, IL	New Orleans, LA	\$3,011	\$362	\$33.50	\$0.85	3
	Lincoln, NE	Galveston-Houston, TX	\$3,510	\$346	\$38.29	\$0.97	4
	Des Moines, IA	Amarillo, TX	\$3,590	\$283	\$38.46	\$0.98	3
	Minneapolis, MN	Tacoma, WA	\$5,000	\$643	\$56.03	\$1.42	2
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,400	\$665	\$50.29	\$1.28	2
	Sioux Falls, SD	Tacoma, WA	\$5,520	\$593	\$60.71	\$1.65	2
	Minneapolis, MN	Portland, OR	\$5,530	\$648	\$61.35	\$1.67	2
	Fargo, ND	Tacoma, WA	\$5,430	\$527	\$59.16	\$1.61	2
	Council Bluffs, IA	New Orleans, LA	\$4,175	\$418	\$45.61	\$1.24	6
	Toledo, OH	Huntsville, AL	\$2,862	\$295	\$31.35	\$0.85	3
Grand Island, NE	Portland, OR	\$5,110	\$589	\$56.60	\$1.54	-3	

<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](http://www.bnsf.com), [www.cpr.ca](http://www.cpr.ca), [www.csx.com](http://www.csx.com), [www.uprr.com](http://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: 12/1/2013

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	\$563	\$70.73	\$1.92	-17
	OK	Cuautitlan, EM	\$6,156	\$684	\$69.88	\$1.90	-10
	KS	Guadalajara, JA	\$6,559	\$660	\$73.77	\$2.01	-12
	TX	Salinas Victoria, NL	\$2,898	\$258	\$32.24	\$0.88	-18
Corn	IA	Guadalajara, JA	\$7,974	\$777	\$89.41	\$2.27	2
	SD	Celaya, GJ	\$7,656	\$736	\$85.75	\$2.18	2
	NE	Queretaro, QA	\$7,317	\$690	\$81.81	\$2.08	1
	SD	Salinas Victoria, NL	\$5,880	\$560	\$65.80	\$1.67	2
	MO	Tlalnepantla, EM	\$6,755	\$670	\$75.87	\$1.93	1
	SD	Torreón, CU	\$6,722	\$617	\$74.98	\$1.90	2
Soybeans	MO	Bojay (Tula), HG	\$7,868	\$655	\$87.08	\$2.37	2
	NE	Guadalajara, JA	\$8,447	\$749	\$93.96	\$2.55	2
	IA	El Castillo, JA	\$8,855	\$732	\$97.95	\$2.66	2
	KS	Torreón, CU	\$6,864	\$465	\$74.88	\$2.04	2
Sorghum	TX	Guadalajara, JA	\$6,764	\$479	\$74.01	\$1.88	1
	NE	Celaya, GJ	\$7,272	\$669	\$81.13	\$2.06	3
	KS	Queretaro, QA	\$7,005	\$420	\$75.86	\$1.93	7
	NE	Salinas Victoria, NL	\$5,628	\$492	\$62.52	\$1.59	7
	NE	Torreón, CU	\$6,328	\$549	\$70.26	\$1.78	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.

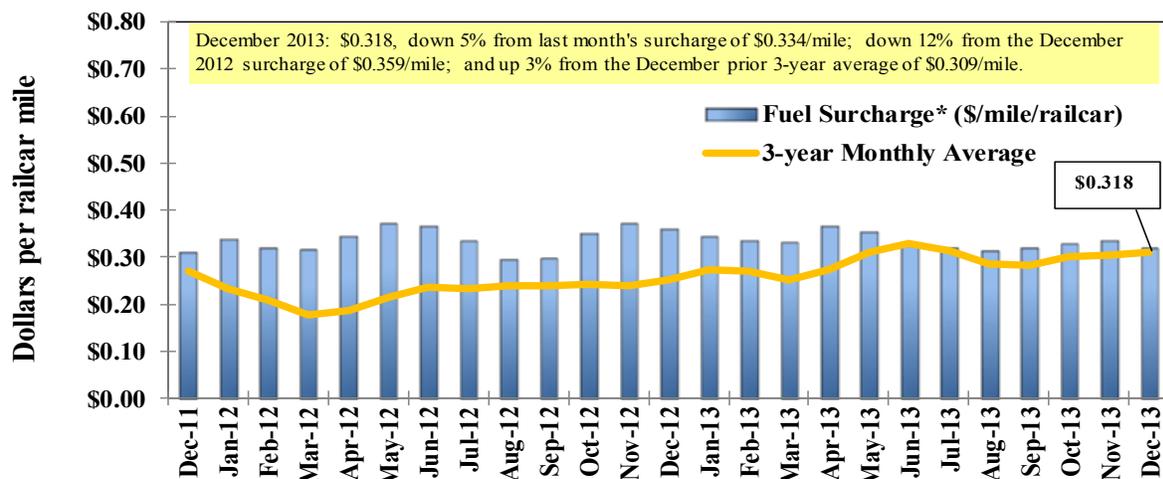
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

<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.

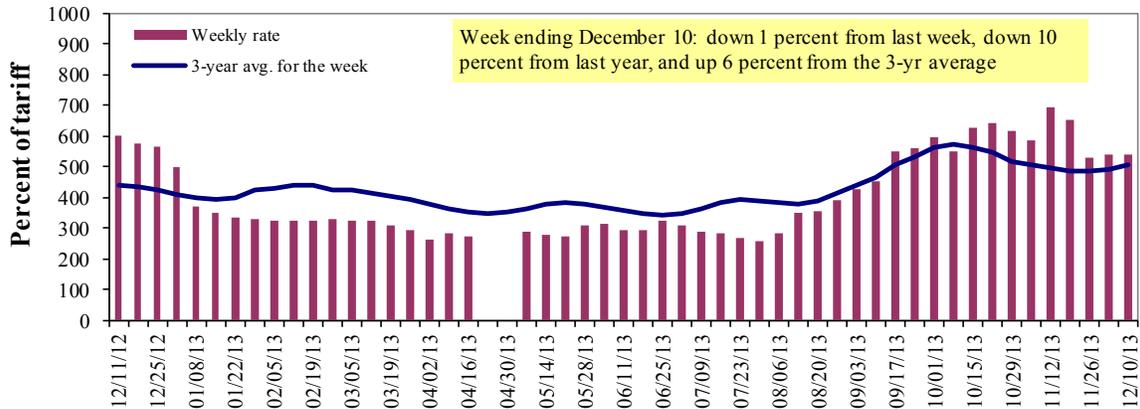
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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>	12/10/2013	--	--	538	430	510	510	315
	12/3/2013	--	--	542	462	542	542	337
<b>\$/ton</b>	12/10/2013	--	--	24.96	17.16	23.92	20.60	9.89
	12/3/2013	--	--	25.15	18.43	25.42	21.90	10.58
<b>Current week % change from the same week:</b>								
	Last year	--	--	-10	-14	-2	-2	-28
	3-year avg. <sup>2</sup>	--	--	6	5	12	12	-9
<b>Rate<sup>1</sup></b>	January	--	--	520	397	453	453	310
	March	425	413	400	327	375	375	300

<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

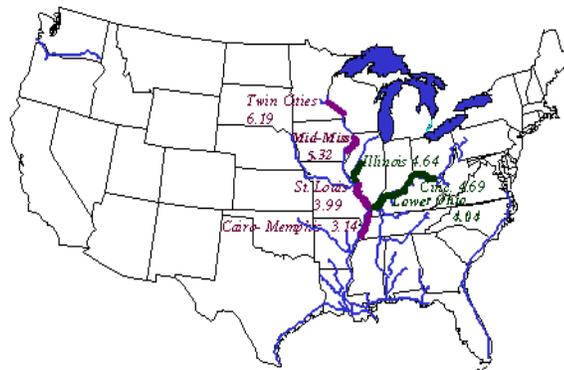
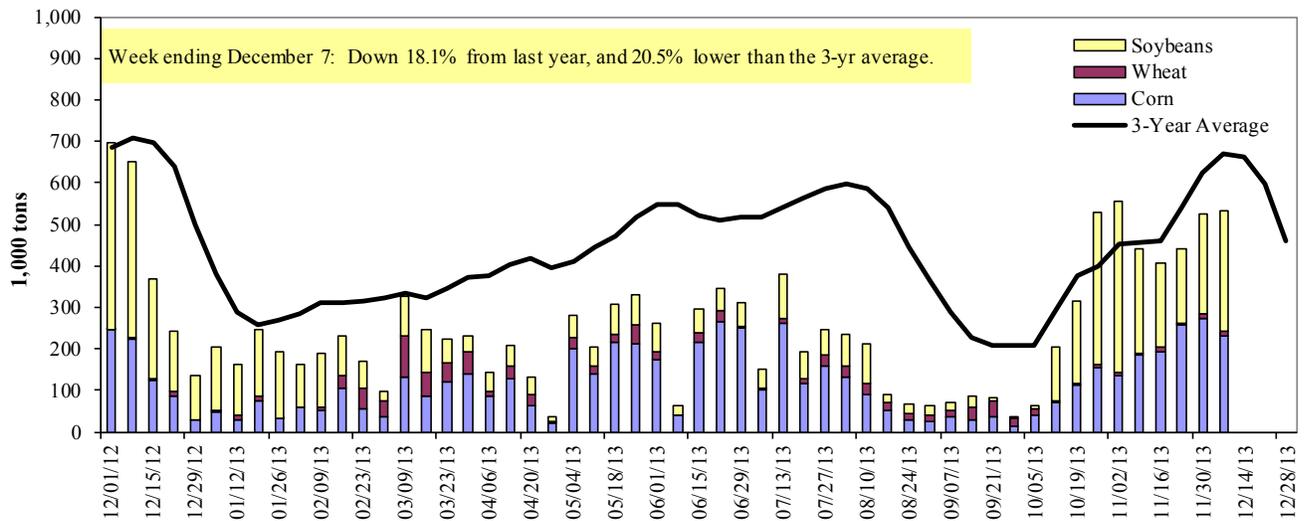


Figure 10

**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 12/07/2013	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	30	0	121	0	151
Winfield, MO (L25)	89	2	198	6	295
Alton, IL (L26)	186	6	235	10	437
Granite City, IL (L27)	233	8	293	3	538
<b>Illinois River (L8)</b>	95	3	45	3	147
<b>Ohio River (L52)</b>	107	11	75	0	193
<b>Arkansas River (L1)</b>	4	6	28	0	38
Weekly total - 2013	345	24	397	3	769
Weekly total - 2012	318	15	472	0	805
2013 YTD <sup>1</sup>	8,764	4,045	8,796	227	21,832
2012 YTD	14,482	1,736	11,771	227	28,217
2013 as % of 2012 YTD	61	233	75	100	77
Last 4 weeks as % of 2012 <sup>2</sup>	100	100	100	100	100
Total 2012	14,837	1,794	12,663	229	29,523

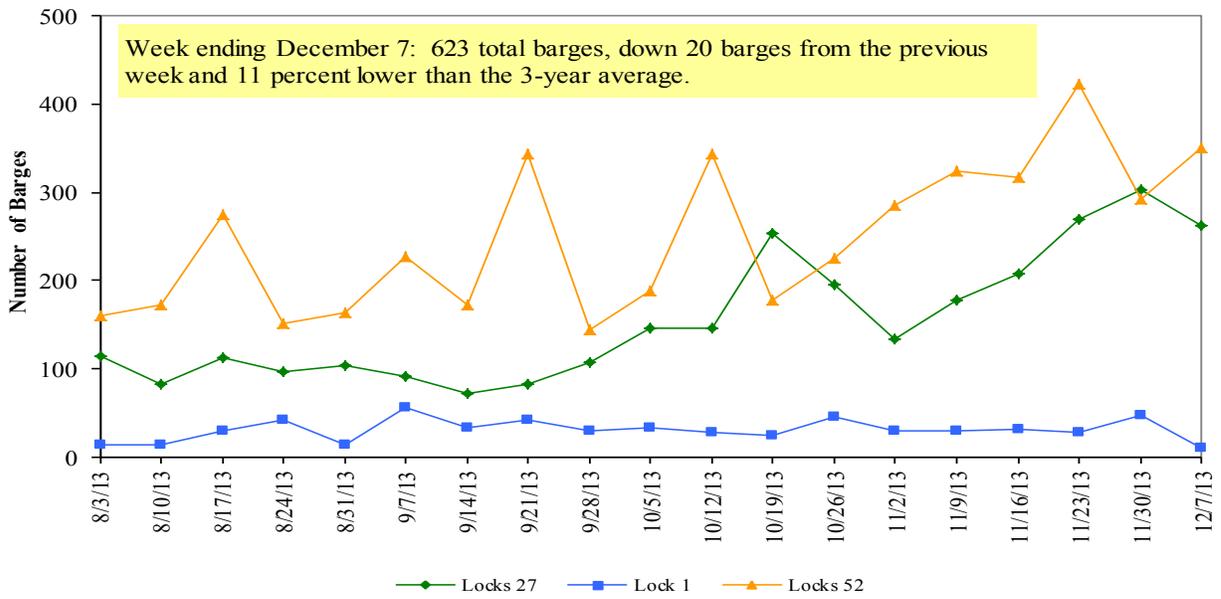
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

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

Note: Total may not add exactly, due to rounding

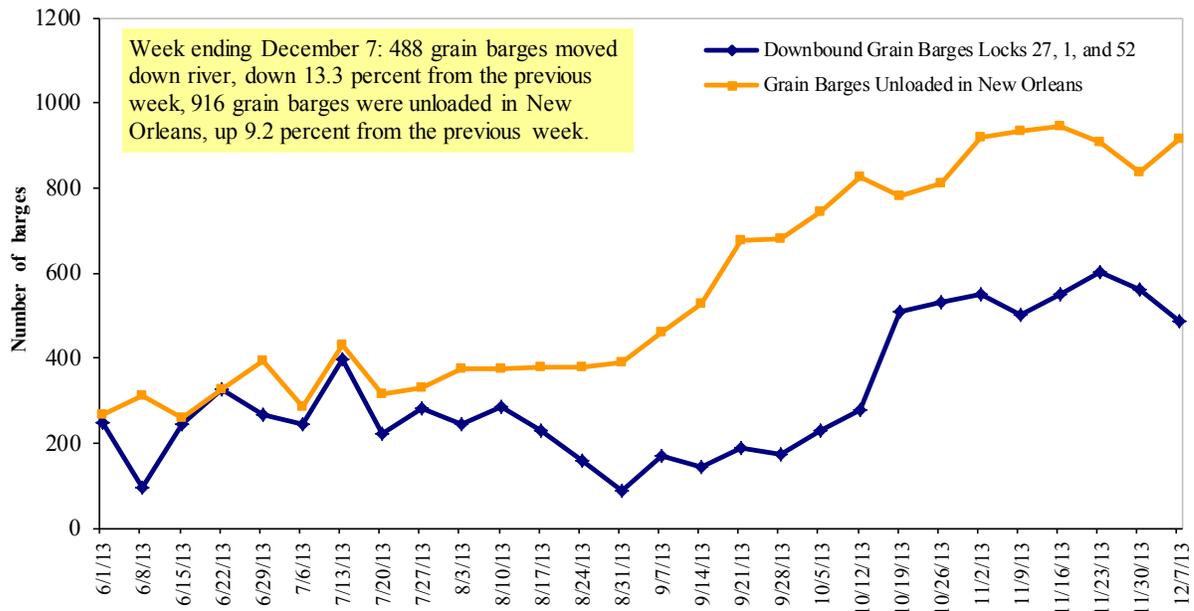
Source: U.S. Army Corps of Engineers

**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 12/9/2013 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.912	0.006	-0.157
	New England	4.066	0.026	-0.109
	Central Atlantic	3.972	0.023	-0.202
	Lower Atlantic	3.837	-0.011	-0.133
II	Midwest <sup>2</sup>	3.870	-0.009	-0.107
III	Gulf Coast <sup>3</sup>	3.773	-0.007	-0.101
IV	Rocky Mountain	3.851	-0.007	-0.087
V	West Coast	3.993	-0.005	-0.049
	West Coast less California	3.906	-0.023	-0.076
	California	4.066	0.010	-0.027
Total	U.S.	3.879	-0.004	-0.112

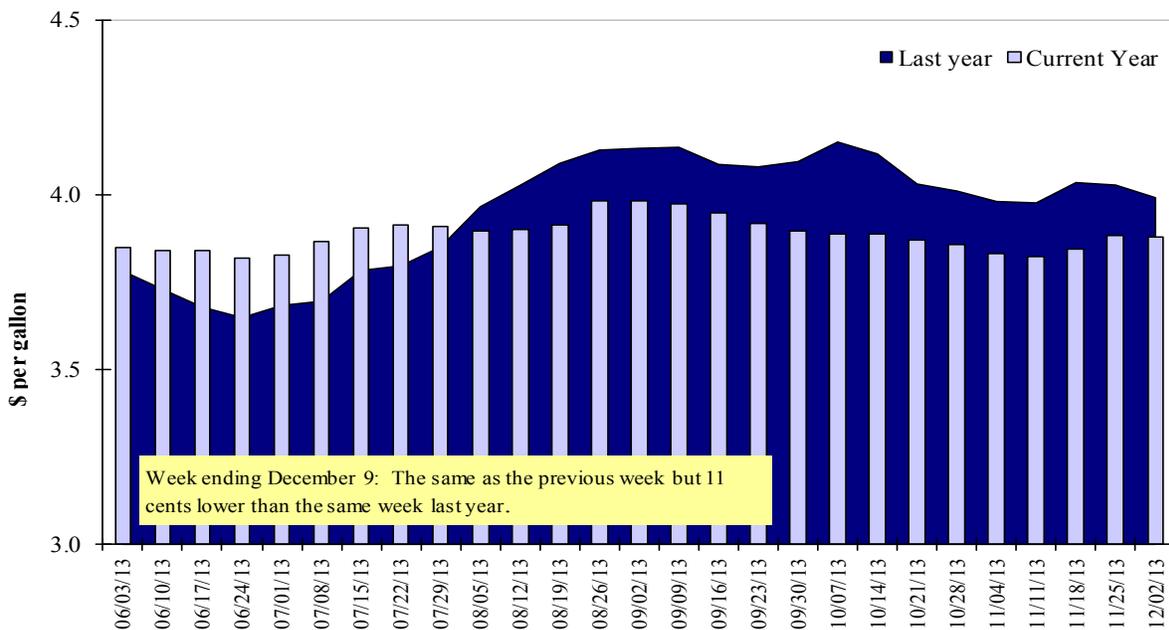
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
11/28/2013	1,454	1,152	1,573	1,029	79	5,288	17,899	20,306	43,493
This week year ago	1,473	671	1,203	1,051	54	4,452	6,830	12,004	23,286
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2013/14 YTD	6,895	5,272	2,865	2,072	213	17,318	8,101	17,286	42,705
2012/13 YTD	4,821	1,664	2,989	2,287	286	12,045	5,399	16,400	33,844
YTD 2013/14 as % of 2012/13	143	317	96	91	75	144	150	105	126
Last 4 wks as % of same period 2012/13	103	172	127	93	149	118	264	180	193
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 11/28/2013	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	4,206	3,906	8	7,000
Mexico	6,816	2,754	147	4,370
China	5,663	1,188	377	2,450
Venezuela	255	237	7	1,158
Taiwan	394	228	73	512
<b>Top 5 Importers</b>	<b>17,333</b>	<b>8,313</b>	<b>109</b>	<b>15,490</b>
<b>Total US corn export sales</b>	<b>26,000</b>	<b>12,230</b>	<b>113</b>	<b>18,670</b>
% of Projected	73%	66%		
Change from prior week	594	52		
<b>Top 5 importers' share of U.S. corn export sales</b>	67%	68%		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 11/28/2013	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	23,967	17,482	37	21,522
Mexico	1,517	1,180	29	2,565
Japan	909	930	(2)	1,751
Indonesia	890	491	81	1,682
Taiwan	830	692	20	1,120
<b>Top 5 importers</b>	<b>28,113</b>	<b>20,776</b>	<b>35</b>	<b>28,641</b>
<b>Total US soybean export sales</b>	<b>37,592</b>	<b>28,404</b>	<b>32</b>	<b>37,060</b>
% of Projected	95%	79%		
Change from prior week	805	1,143		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>75%</b>	<b>73%</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/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). (Carryover plus Accumulated Exports)

Table 15

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

Week Ending 11/28/2013	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	1,662	2,248	(26)	3,544
Nigeria	1,854	1,897	(2)	3,002
Mexico	2,141	2,231	(4)	2,761
Philippines	1,284	1,437	(11)	1,965
Egypt	151	168	(10)	1,678
Korea	921	1,123	(18)	1,385
Taiwan	612	725	(16)	1,038
China	4,088	465	779	743
Brazil	3,226	63	5021	527
Colombia	455	407	12	600
<b>Top 10 importers</b>	<b>16,394</b>	<b>10,765</b>	<b>52</b>	<b>17,243</b>
<b>Total US wheat export sales</b>	<b>22,606</b>	<b>16,498</b>	<b>37</b>	<b>26,348</b>
% of Projected	76%	60%		
Change from prior week	229	353		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>73%</b>	<b>65%</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/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).

Table 16

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

Port regions	Week ending 12/05/13	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	194	149	130	10,872	12,099	90	92	77	12,625
Corn	251	328	77	2,378	5,290	45	564	158	5,512
Soybeans	324	191	170	8,378	9,814	85	137	158	10,347
<b>Total</b>	<b>769</b>	<b>668</b>	<b>115</b>	<b>21,628</b>	<b>27,203</b>	<b>80</b>	<b>160</b>	<b>132</b>	<b>28,484</b>
<b>Mississippi Gulf</b>									
Wheat	110	133	83	9,529	5,257	181	162	151	5,462
Corn	576	403	143	13,639	17,416	78	207	111	18,068
Soybeans	945	933	101	18,518	22,591	82	117	132	24,684
<b>Total</b>	<b>1,632</b>	<b>1,470</b>	<b>111</b>	<b>41,686</b>	<b>45,264</b>	<b>92</b>	<b>135</b>	<b>127</b>	<b>48,215</b>
<b>Texas Gulf</b>									
Wheat	164	123	133	8,694	5,634	154	203	120	5,912
Corn	61	0	n/a	224	336	67	29,913	100	336
Soybeans	61	60	101	849	524	162	256	125	626
<b>Total</b>	<b>285</b>	<b>183</b>	<b>156</b>	<b>9,767</b>	<b>6,493</b>	<b>150</b>	<b>231</b>	<b>119</b>	<b>6,874</b>
<b>Interior</b>									
Wheat	18	17	104	1,002	1,186	84	118	62	1,218
Corn	130	178	73	3,577	6,011	60	136	145	6,115
Soybeans	92	51	178	3,013	4,026	75	277	109	4,204
<b>Total</b>	<b>239</b>	<b>247</b>	<b>97</b>	<b>7,592</b>	<b>11,224</b>	<b>68</b>	<b>53</b>	<b>123</b>	<b>11,538</b>
<b>Great Lakes</b>									
Wheat	52	0	n/a	797	444	180	1,479	91	481
Corn	0	0	n/a	0	56	0	n/a	0	56
Soybeans	41	93	44	597	591	101	177	227	713
<b>Total</b>	<b>93</b>	<b>93</b>	<b>100</b>	<b>1,394</b>	<b>1,090</b>	<b>128</b>	<b>256</b>	<b>146</b>	<b>1,250</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	645	341	189	n/a	0	341
Corn	0	1	n/a	229	143	159	118	29	143
Soybeans	117	89	132	1,346	1,209	111	118	158	1,460
<b>Total</b>	<b>117</b>	<b>89</b>	<b>130</b>	<b>2,220</b>	<b>1,693</b>	<b>131</b>	<b>118</b>	<b>146</b>	<b>1,944</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	537	423	127	31,540	24,959	126	136	101	26,040
Corn	1,018	910	112	20,046	29,253	69	277	126	30,230
Soybeans	1,579	1,417	111	32,701	38,755	84	124	139	42,035
<b>Total</b>	<b>3,135</b>	<b>2,750</b>	<b>114</b>	<b>84,287</b>	<b>92,967</b>	<b>91</b>	<b>149</b>	<b>128</b>	<b>98,305</b>

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

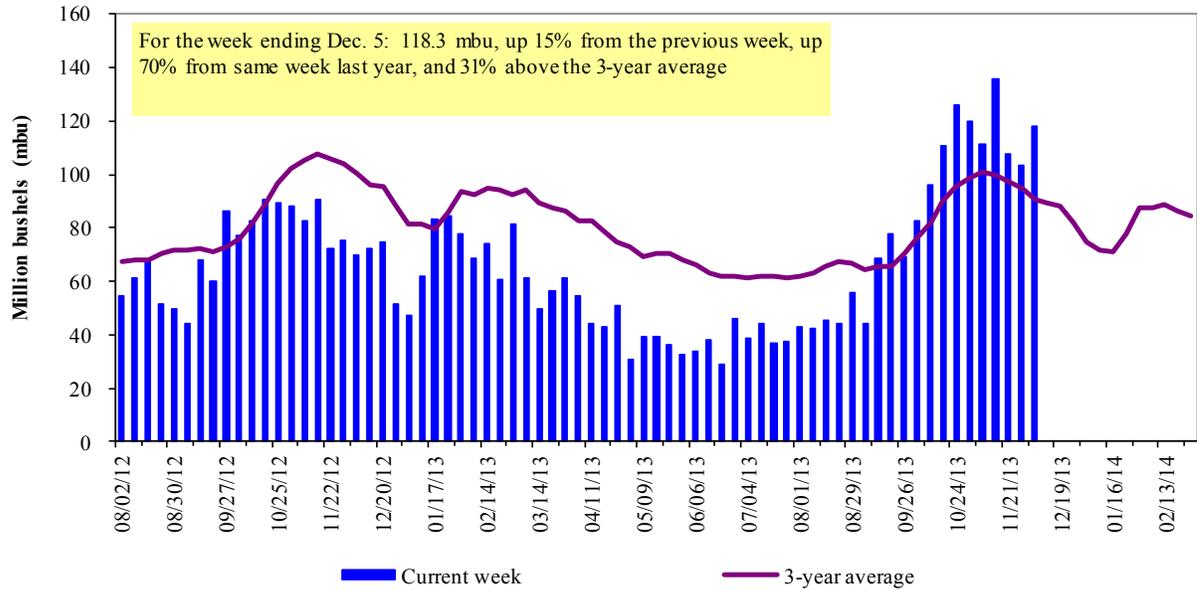
<sup>2</sup>Total includes only port regions shown above; Interior land-based shipments now included.

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)**

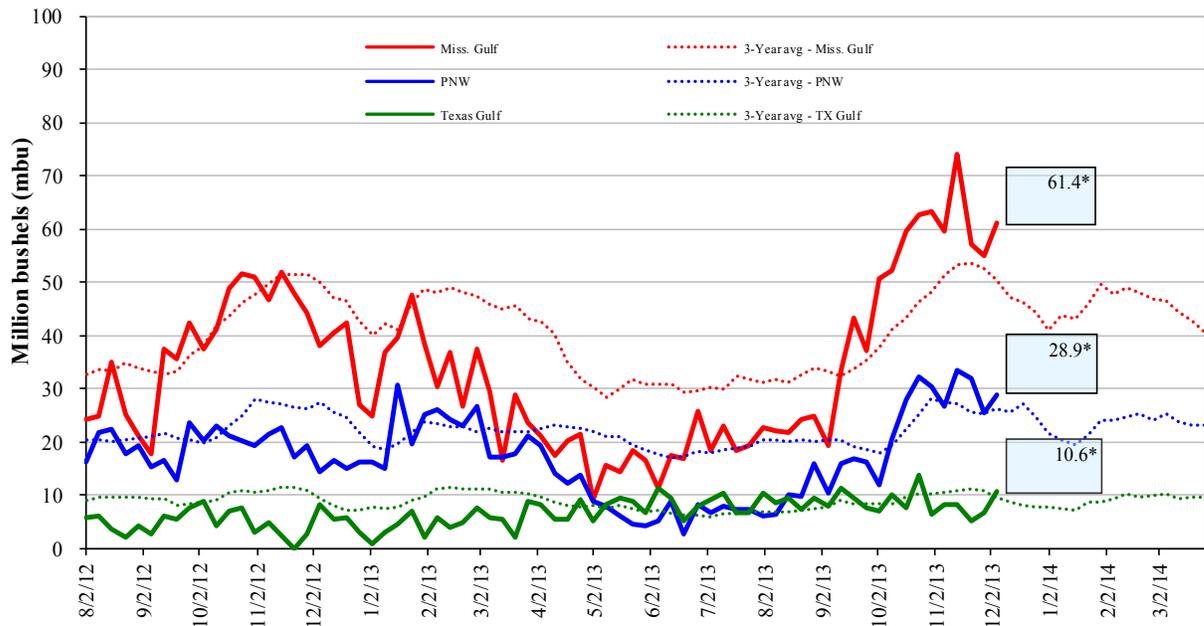


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

Dec. 5: % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 12	up 58	up 16	up 14
Last year (same week)	up 61	up 29	up 55	up 101
3-yr avg. (4-wk mov. avg.)	up 25	up 66	up 30	up 30

# Ocean Transportation

Table 17

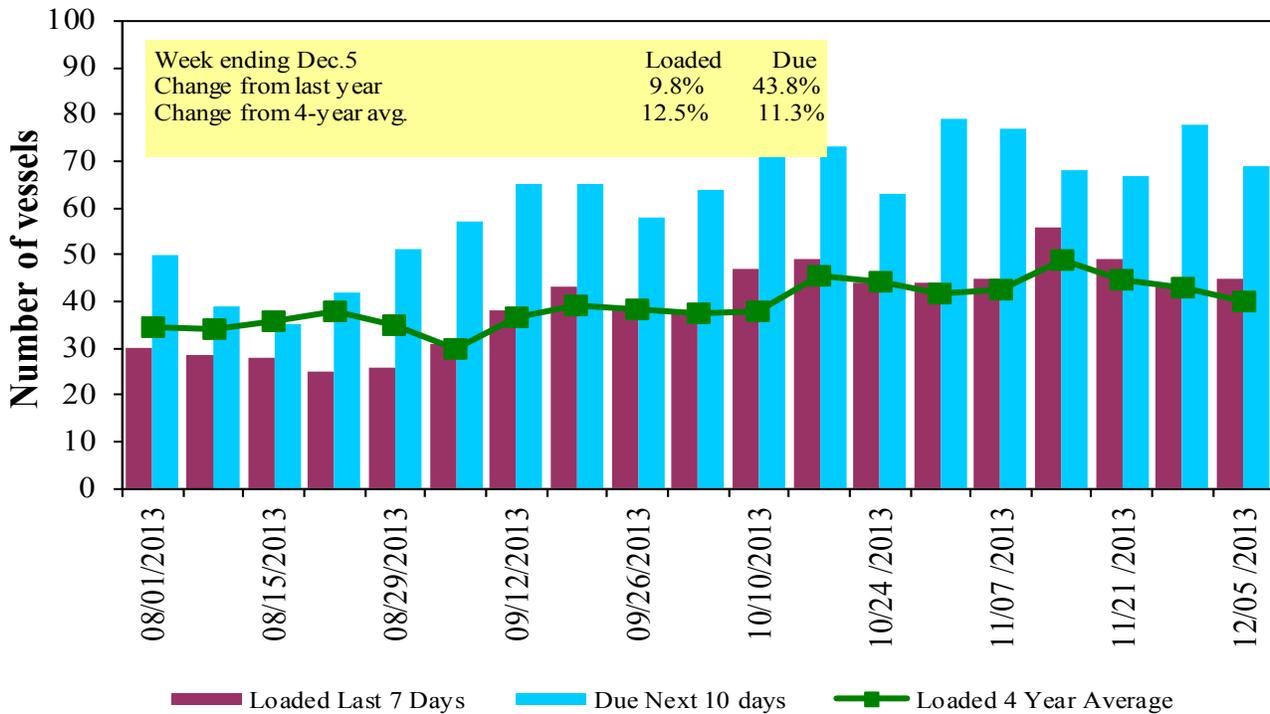
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
12/5/2013	53	45	69	21	n/a
11/28/2013	47	43	78	n/a	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**

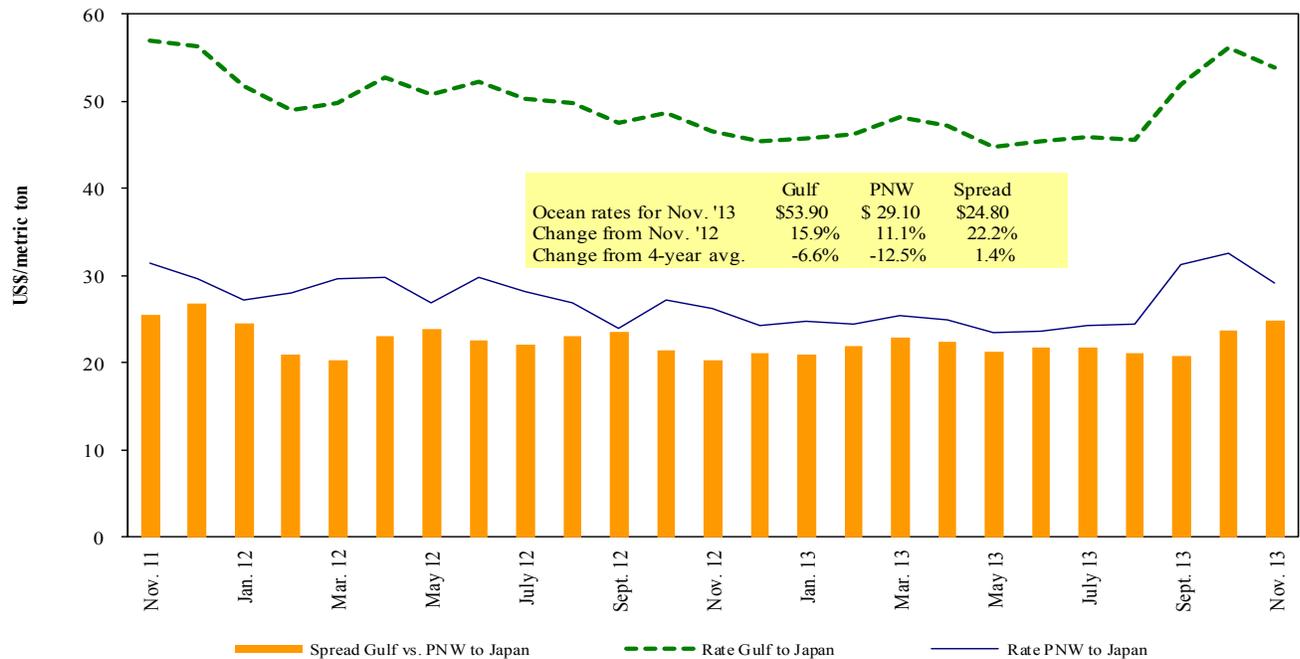


Source: Transportation & Marketing Programs/AMS/USDA

<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 12/07/2013

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 15/30	55,000	47.50
U.S. Gulf	China	Heavy Grain	Dec 15/25	60,000	54.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	55,000	49.00
U.S. Gulf	China	Heavy Grain	Dec 1/10	60,000	51.00
U.S. Gulf	China	Heavy Grain	Dec 1/5	55,000	45.00
U.S. Gulf	China	Heavy Grain	Nov 20/30	60,000	52.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	53.25
U.S. Gulf	China	Heavy Grain	Nov-Dec	55,000	49.50
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Dec 16/26	35,880	125.62
U.S. Gulf	S. Korea	Heavy Grain	Dec 5/20	58,000	54.00
U.S. Gulf	S. Korea	Heavy Grain	Nov 19/20	60,000	53.50
Atlantic	China	Heavy Grain	Nov 20/25	55,000	50.25
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	Heavy Grain	Dec 10/20	25,000	27.50
France	Algeria	Wheat	Dec 1/5	25,000	26.00
Mexico	Algeria	Wheat	Nov 15/30	55,000	34.00
Ukraine	Italy	Corn	Oct 30/31	25,000	26.00
Ukraine	Sp Mediterranean	Grain	Dec 5/9	60,000	15.00

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

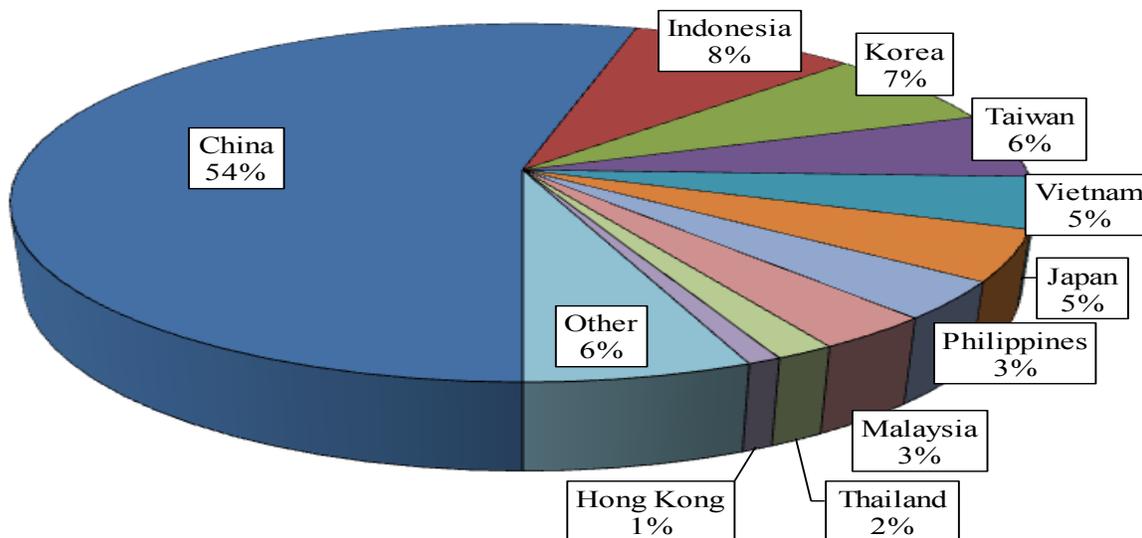
<sup>1</sup>50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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**

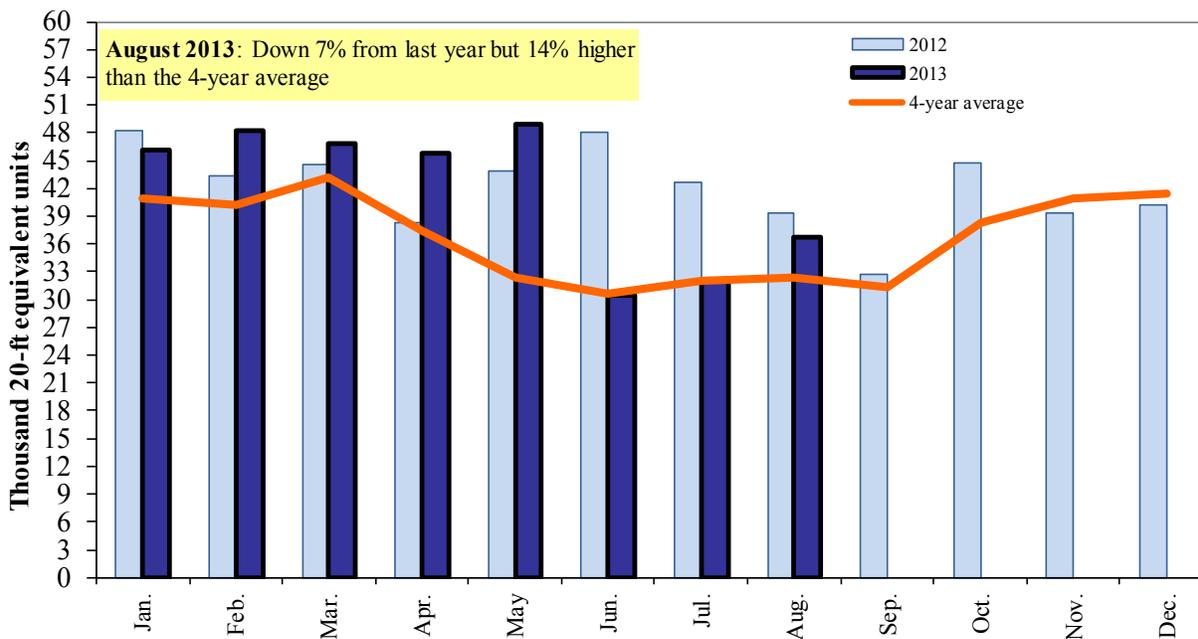


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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