



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

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WEEKLY HIGHLIGHTS

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Total Grain Inspections Down but Corn Inspections Rebound

For the week ending February 23, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.74 million metric tons (mmt), down 3 percent from the previous week, up 27 percent from the same time last year, and 10 percent above the 3-year average. Total inspections of corn, the highest since late September, increased 26 percent from the previous week and jumped 61 percent from last year. Shipments of corn increased primarily to Latin America. Total wheat inspections, however, decreased 6 percent from the previous week, and soybeans decreased 32 percent due to lower shipments to Asia. Grain inspections in the Pacific Northwest decreased 4 percent from the previous week, and Mississippi Gulf inspections decreased 16 percent. Outstanding export sales (unshipped) are down for corn, wheat, and soybeans.

February Weekly Average Barge Movement Highest Since 2013

In February, average weekly barge movements for the major grain crops moved on the Mississippi River reached the highest level since 2013, at 675 thousand tons (**GTR Table 10**), which is 6 percent higher than 2016 and 21 percent higher than the previous year for the same month. During a typical year, corn movements peak first in summer and later rise again in November or early December. In 2016, corn movements by barge reached the second peak at 560 thousand tons in early December, 47 percent higher than the previous year and 83 percent higher than 2014. This reflects an abundance of corn supplied to the Mississippi Gulf. The weekly barge movements for soybeans also showed historical highs, peaking at 920 thousand tons in the last week of October 2016. After the peak, soybean movements by barge usually show a trend of decline in the winter and spring time. In February 2017, average soybean tonnage moved by barge dropped 28 percent from the previous month and decreased 10 percent from the same month last year.

Bahri Dry Bulk and Bunge Announce Ocean Freight Joint Venture

On February 22, Bahri Dry Bulk Company and Koninklijke Bunge B.V. announced they are forming a joint venture to establish an ocean freight supplier for dry bulk import and export flows in and out of the Middle East region. Executives from both companies have expressed their interest to: (1) meet the growing demand for freight services in the region, (2) reduce the complexity along the value chain of dry bulk imports, and (3) become the carrier of choice to those importing grains and other agricultural commodities in the Middle East. The joint venture will operate under the name Bunge Bahri Dry Bulk Ltd. In 2016, Saudi Arabia and Egypt were the 7th and 8th major destinations, respectively, for U.S. corn exports.

Port of Portland and ICTSI Agree to Terminal Lease Termination

According to the Port of Portland, International Container Terminal Services, Oregon, Inc. (ICTSI) has agreed to terminate its lease agreement to operate the container facility at Terminal 6. The agreement relieves ICTSI of its 25-year lease obligation in exchange for \$11.45 million in compensation to the Port. For the past few years, disagreements between ICTSI and the International Longshoremen Workers Union have resulted in significant service disruptions at the terminal, which is Oregon's only deep draft international container terminal. Containerized agricultural shipments fell from over 22,500 twenty-foot equivalent units (TEU) in 2013 to under 300 TEU in 2016. Local shippers of hay, potatoes, beans, and lentils relied on the convenience of the Port of Portland and the reduced transportation cost it afforded compared to the closest alternatives in Seattle or Tacoma, WA. According to the Port, "This is the best opportunity to launch a new strategy to restore carrier service for Oregon and Northwest shippers."

Snapshots by Sector

Export Sales

For the week ending February 16, **unshipped balances** of wheat, corn, and soybeans totaled 35.9 mmt, down 35 percent from the same time last year. Net weekly **wheat export sales** were .451 mmt, down 13 percent from the previous week. Net **corn export sales** were .743 mmt, down 5 percent from the previous week, and net **soybean export sales** were .414 mmt, down 44 percent from the past week.

Rail

U.S. Class 1 railroads originated 22,811 **grain carloads** for the week ending February 18, up 11 percent from the previous week, up 1 percent from last year, and up 6 percent from the 3-year average.

Average March shuttle **secondary railcar bids/offers** per car were \$1,788 above tariff for the week ending February 23, up \$606 from last week, and \$1,950 higher than last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending February 25, **barge grain movements** totaled 538,300 tons, 27 percent lower than the last week, and up 19 percent from the same period last year.

For the week ending February 25, 328 grain barges **moved down river**, down 31 percent from last week, 815 grain barges were **unloaded in New Orleans**, down 8 percent from the previous week.

Ocean

For the week ending February 23, 51 **ocean-going grain vessels** were loaded in the Gulf, 24 percent more than the same period last year. Seventy-seven vessels are expected to be loaded within the next 10 days, 45 percent more than the same period last year.

Feature Article/Calendar

Corn and Soybean Transportation Costs Up; Total Landed Costs Mixed

Fourth-quarter 2016 transportation costs for shipping corn and soybeans from Minneapolis, MN, through the Gulf and the Pacific Northwest (PNW) to Japan increased from the previous quarter and last year. Quarter-to-quarter transportation costs for shipping grain through each region increased mainly due to a notable increase in ocean rates, which was caused by higher demand for bulk shipping, especially for iron ore and coal from China (see *Grain Transportation Report (GTR) 1/19/2017*). Total landed costs for shipping corn through the Gulf and PNW to Japan increased slightly from quarter to quarter, but costs for shipping soybeans were down (see *tables 1 and 2*). Although total fourth quarter landed costs for shipping soybeans from the Midwest to Japan through the PNW and Gulf increased from last year, corn landed costs are down over the same period (see *figure*).

U.S. Gulf Costs: Total fourth quarter transportation costs for shipping corn and soybeans from Minneapolis through the Gulf to Japan increased 4 percent from the previous quarter (*table 1*). Ocean rates increased 13 percent from last quarter and 15 percent from last year, as demand for shipping bulk products increased. Barge rates decreased 3 percent because demand for barge services began to fall during the period. Trucking rates were unchanged from the previous quarter, but were up 26 percent from the fourth quarter of 2015 due to increased demand for wheat and increasing trucking activity. Year-to-year transportation costs for shipping corn and soybeans through the Gulf, however, were up 6 percent due to a notable jump in trucking and ocean rates (see *table 1*).

Table 1: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	\$/metric ton			Percent change		\$/metric ton			Percent Change	
	4thQtr 15	3rdQtr 16	4thQtr 16	Yr. to Yr.	Qtr to Qtr	4thQtr 15	3rdQtr 16	4thQtr 16	Yr. to Yr.	Qtr to Qtr
Truck	8.38	10.58	10.58	26.25	0.00	8.38	10.58	10.58	26.25	0.00
Barge	34.05	32.93	31.93	-6.23	-3.04	34.05	32.93	31.93	-6.23	-3.04
Ocean	29.31	29.92	33.67	14.88	12.53	29.31	29.92	33.67	14.88	12.53
Total Transportation Cost	71.74	73.43	76.18	6.19	3.75	71.74	73.43	76.18	6.19	3.75
Farm Value ²	135.95	124.27	124.14	-8.69	-0.10	314.77	353.84	337.92	7.35	-4.50
Total Landed Cost	207.69	197.7	200.32	-3.55	1.33	386.51	427.27	414.1	7.14	-3.08
Transportation % Landed Cost	34.54	37.14	38.03			18.56	17.19	18.40		

Table 2: Cost of Shipping Corn and Soybeans from Minneapolis to Japan through the U.S. PNW

	Corn					Soybeans				
	\$/metric ton			Percent change		\$/metric ton			Percent Change	
	4thQtr 15	3rdQtr 16	4thQtr 16	Yr. to Yr.	Qtr to Qtr	4thQtr 15	3rdQtr 16	4thQtr 16	Yr. to Yr.	Qtr to Qtr
Truck	8.38	10.58	10.58	26.25	0.00	8.38	10.58	10.58	26.25	0.00
Rail ¹	49.96	49.23	49.29	-1.34	0.12	55.02	54.29	55.81	1.44	2.80
Ocean	15.97	16.61	18.43	15.40	10.96	15.97	16.61	18.43	15.40	10.96
Total Transportation Cost	74.31	76.42	78.30	5.37	2.46	79.37	81.48	84.82	6.87	4.10
Farm Value ²	135.95	124.27	124.14	-8.69	-0.10	314.77	353.84	337.92	7.35	-4.50
Total Landed Cost	210.26	200.69	202.44	-3.72	0.87	394.14	435.32	422.74	7.26	-2.89
Transportation % Landed Cost	35.34	38.08	38.68			20.14	18.72	20.06		

Source: USDA/AMS/TMP

¹ Rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car

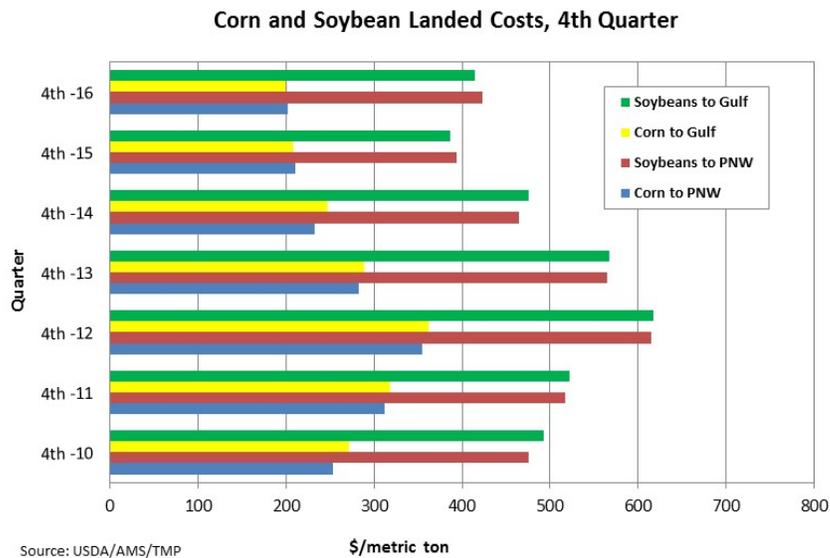
² Source: USDA/NASS, Agricultural Prices; includes quarterly prices in dollars per bushel converted to dollars per metric ton

During the quarter, total landed costs for shipping corn and soybeans through the Gulf reached \$200 per metric ton (mt) and \$414 per mt, respectively. Quarter-to-quarter landed costs for shipping through the Gulf increased over 1 percent for corn, but decreased 3 percent for soybeans due to lower barge rates and farm values (*table 1*). Year-to-year landed costs for shipping from the Gulf decreased 4 percent for corn due to lower barge rates and farm values, but landed costs increased 7 percent for soybeans due to higher farm values (*table 1*). Transportation costs for shipping corn from the Gulf to Japan accounted for 38 percent of the total landed cost during the fourth quarter, which is above the previous quarter and last year. Soybean's share of the landed cost accounted for 18 percent of the total costs, which is above the previous quarter but slightly below last year (*table 1*).

PNW Costs: Fourth-quarter transportation costs for shipping corn and soybeans from Minneapolis via the PNW to Japan increased 4 and 3 percent, respectively, from the previous quarter (*table 2*). Higher ocean rail rates caused quarter-to-quarter transportation costs to increase to Japan through the PNW. Rail rates for shipping corn and soybeans to the PNW increased slightly from quarter to quarter. Year-to-year rail rates for shipping corn decreased slightly, but increased for soybeans. Year-to-year transportation costs to ship grain to the PNW increased 5 percent for corn and 7 percent for soybeans, primarily due to higher trucking and ocean rates.

The total landed costs for shipping grain from the PNW to Japan increased 1 percent from the previous quarter for corn, but decreased 3 percent for soybeans due to the drop in soybean farm values. Total fourth-quarter landed costs ranged from \$202 per mt for corn to \$423 per mt for soybeans (*table 2*). Year-to-year total landed cost decreased 4 percent for corn and 7 percent for soybeans. PNW transportation costs increased from year to year, but farm values decreased. Transportation costs for corn shipped through the PNW accounted for

39 percent of the total landed cost during the fourth quarter, which is above the third quarter and last year (*table 2*). Fourth quarter transportation costs for soybeans shipped through the PNW were 20 percent of the landed cost, which is above the third quarter but slightly below last year.



According to USDA's Grain

Inspection, Packers and Stockyards Administration, fourth-quarter inspections of corn for export increased 68 percent from the previous year and were 37 percent below the 5-year average (*see GTR 01/12/17*). Total fourth-quarter exports of corn to Asia jumped over 100 percent from 2015, with shipments up significantly to Japan and South Korea. Fourth-quarter corn exports to South America increased 27 percent from last year. Compared to 2015, fourth-quarter soybean inspections reached a record 31 million metric tons, which is up 13 percent from the past year and 37 percent above the 5-year average. Fourth-quarter soybean shipments to Asia increased 24 percent from the fourth quarter of 2015.

According to USDA's February *World Agricultural Supply and Demand Estimates* report, the forecast for 2016/17 corn exports is unchanged from January, but is 18 percent above the 2015/16 marketing year. The forecast for corn exports is up due to higher U.S. production and increasing demand. The February forecast for 2016/17 exports of soybeans is also unchanged from January, but 6 percent above the 2015/16 marketing year. Johnny.Hill@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
	Unit	Train	Shuttle		Gulf	Pacific
03/01/17	173	262	286	171	163	135
02/22/17	173	267	260	161	160	131

¹Indicator: 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)

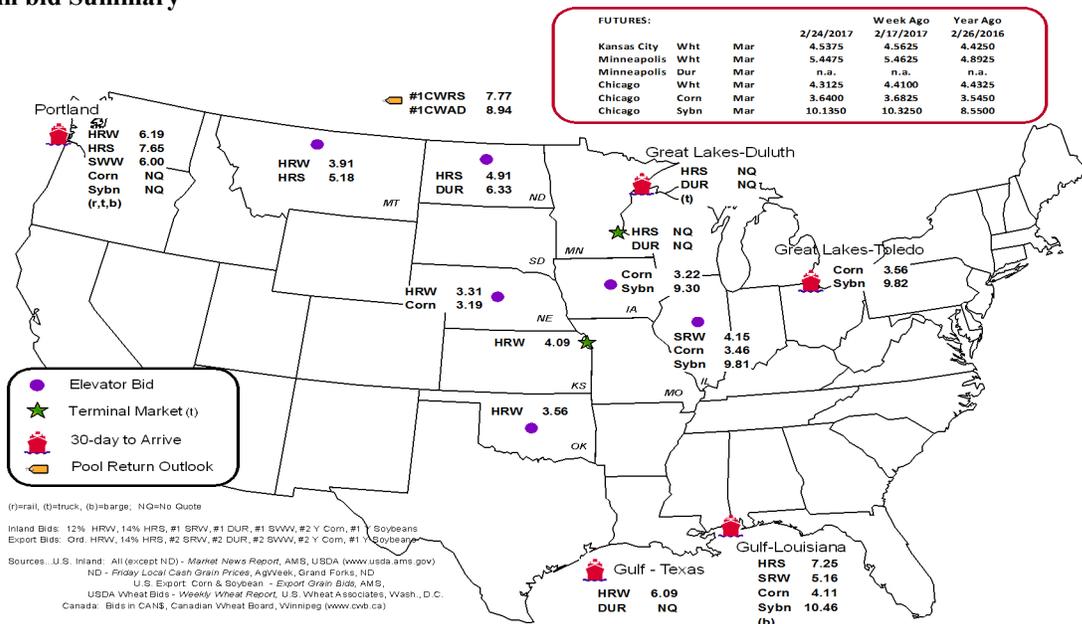
Commodity	Origin--Destination	2/24/2017	2/17/2017
Corn	IL--Gulf	-0.65	-0.63
Corn	NE--Gulf	-0.92	-0.90
Soybean	IA--Gulf	-1.16	-1.19
HRW	KS--Gulf	-2.00	-2.10
HRS	ND--Portland	-2.74	-2.76

Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
02/22/2017 ^p	609	2,057	5,706	407	8,779	2/18/2017	2,140
02/15/2017 ^r	856	1,932	5,375	756	8,919	2/11/2017	2,198
2017 YTD ^r	6,536	15,327	48,339	5,997	76,199	2017 YTD	16,482
2016 YTD ^r	4,682	12,239	47,865	6,003	70,789	2016 YTD	14,537
2017 YTD as % of 2016 YTD	140	125	101	100	108	% change YTD	113
Last 4 weeks as % of 2016 ²	120	121	99	82	103	Last 4wks % 2016	107
Last 4 weeks as % of 4-year avg. ²	99	155	120	78	119	Last 4wks % 4 yr	136
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2016 and prior 4-year average.

³ 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.

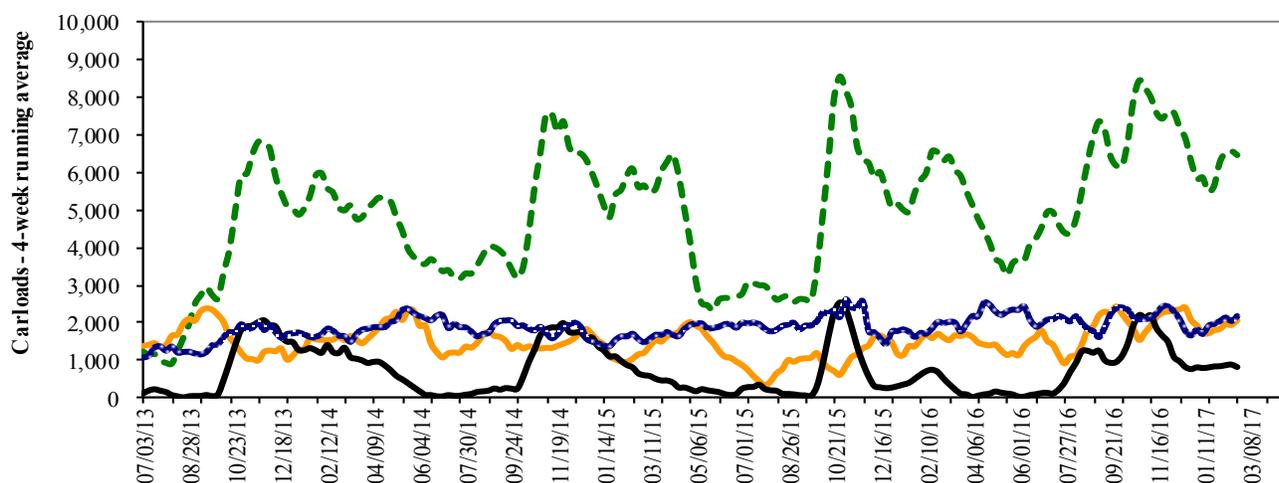
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 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 2/22--down 1% from same period last year; up 20% from 4-year average
— Texas Gulf: 4 wks. ending 2/22--up 21% from same period last year; up 55% from 4-year average
— Miss. River: 4 wks. ending 2/22--up 20% from same period last year; down 1% from 4-year average
. . . Cross-border: 4 wks. ending 2/18--up 7% from same period last year; up 36% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

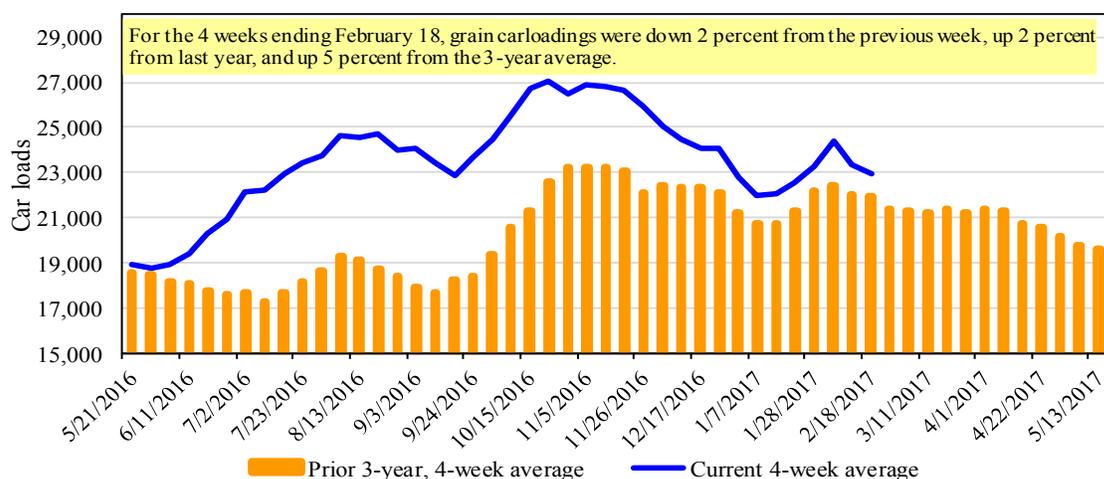
For the week ending: 2/18/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,780	2,146	11,903	1,059	5,923	22,811	3,687	4,447
This week last year	1,984	2,789	11,191	784	5,734	22,482	3,357	4,271
2017 YTD	14,291	20,062	78,392	7,386	42,049	162,180	26,257	29,599
2016 YTD	14,279	19,945	77,862	6,116	37,498	155,700	24,332	30,150
2017 YTD as % of 2016 YTD	100	101	101	121	112	104	108	98
Last 4 weeks as % of 2016*	103	90	99	126	110	102	116	105
Last 4 weeks as % of 3-yr avg.**	101	92	107	118	106	105	105	103
Total 2016	95,179	151,005	590,779	45,246	300,836	1,183,045	194,013	234,738

*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**The past 4 weeks as a percent of the same period from 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 Offerings¹ (\$/car)²

For the week ending: 2/23/2017		Delivery period							
		Mar-17	Mar-16	Apr-17	Apr-16	May-17	May-16	Jun-17	Jun-16
BNSF ³	COT grain units	62	no bids	5	no bids	0	no bids	0	no bids
	COT grain single-car ⁵	119	0	no bids	no bids	31	no bids	12	0
UP ⁴	GCAS/Region 1	no offer	no bids	no bids	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	no offer	no bids	11	no bids	no offer	no bids	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

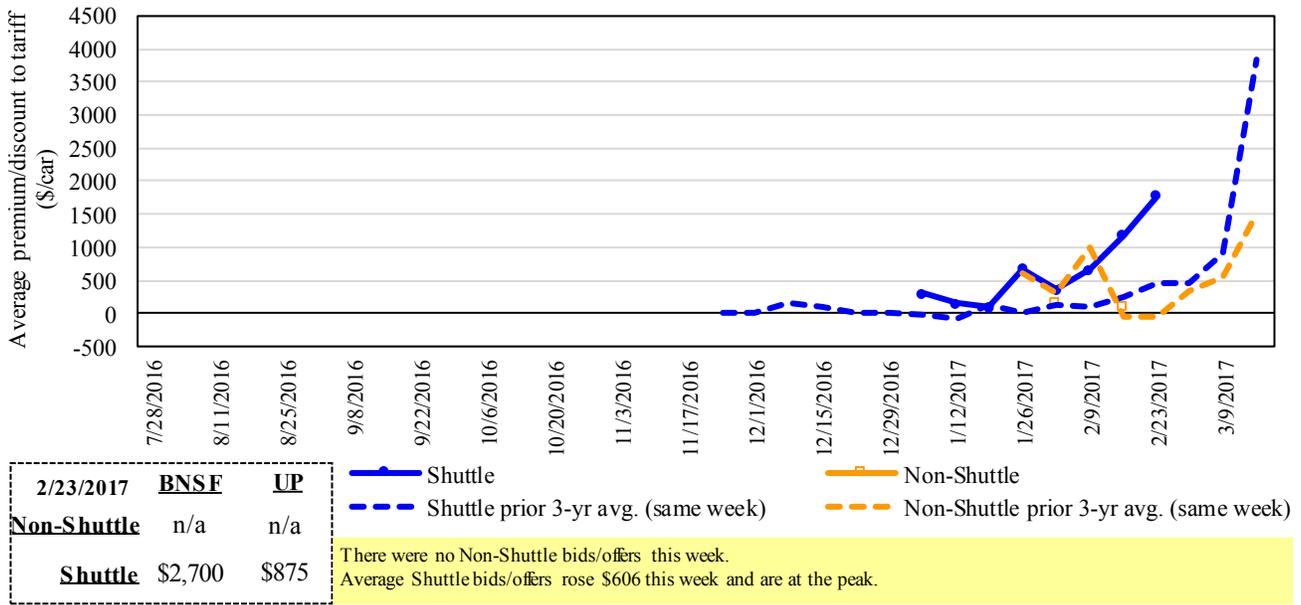
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

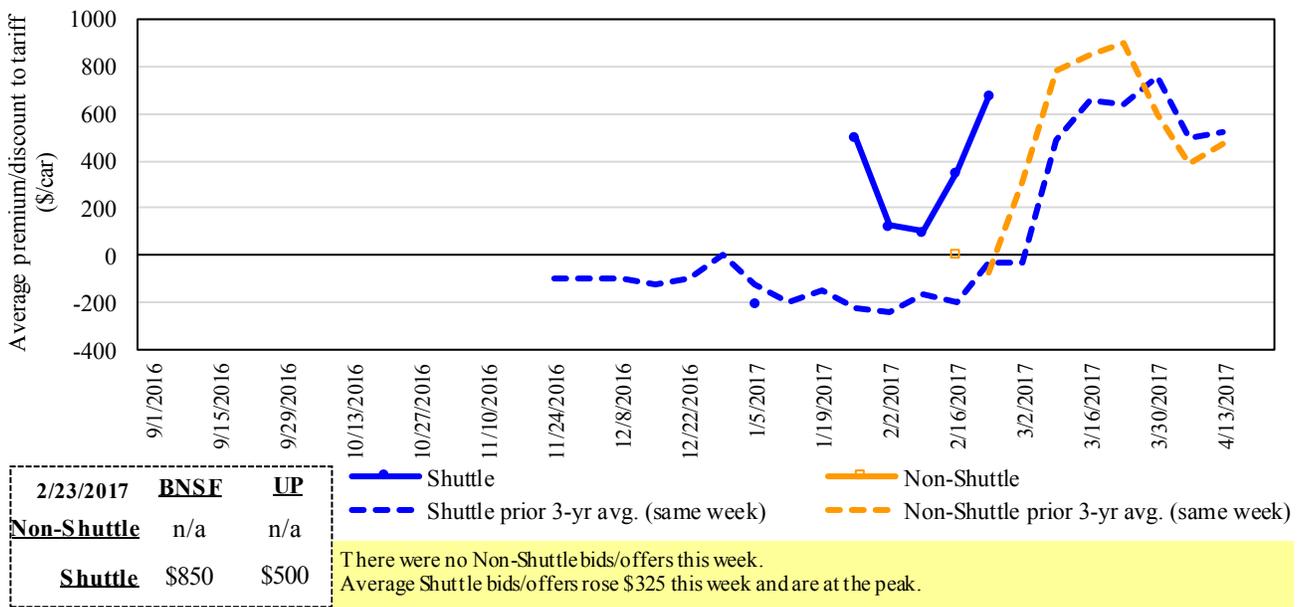
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in March 2017, Secondary Market



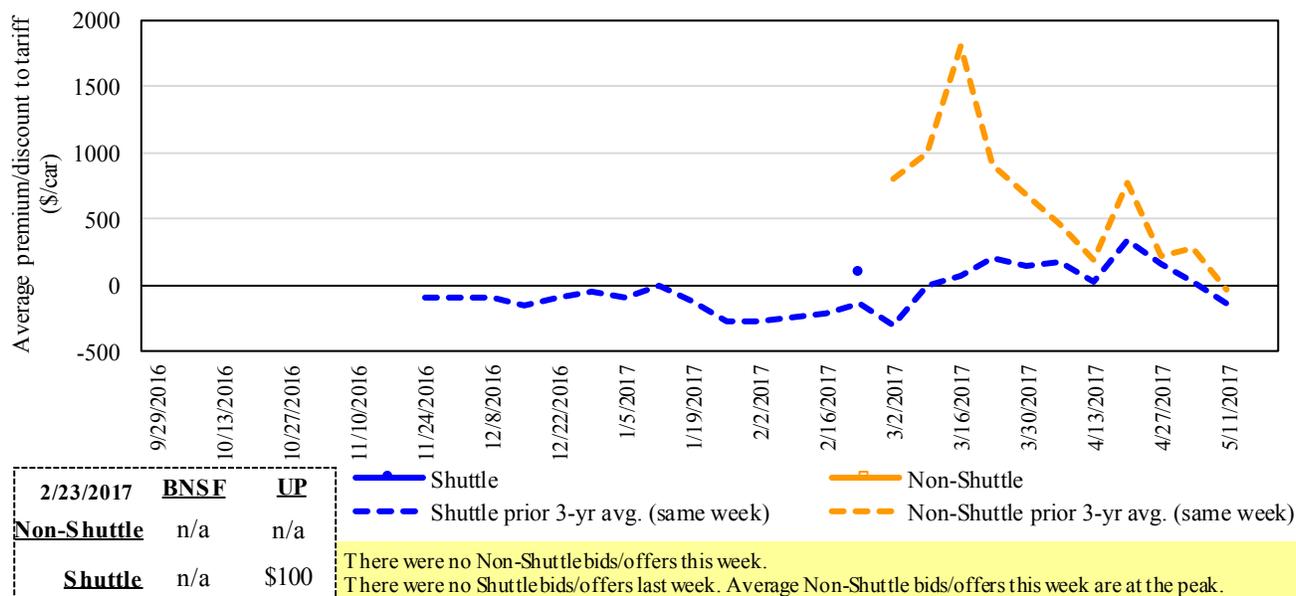
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in April 2017, 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 May 2017, Secondary Market



Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Table 6
Weekly Secondary Railcar Market (\$/car)¹

For the week ending:		Delivery period					
		2/23/2017	Mar-17	Apr-17	May-17	Jun-17	Jul-17
Non-shuttle	BNSF-GF	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	2700	850	n/a	n/a	n/a	n/a
	Change from last week	700	250	n/a	n/a	n/a	n/a
	Change from same week 2016	2875	988	n/a	n/a	n/a	n/a
	UP-Pool	875	500	100	n/a	n/a	n/a
	Change from last week	512	400	n/a	n/a	n/a	n/a
	Change from same week 2016	1025	n/a	n/a	n/a	n/a	n/a

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

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.

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

March, 2017	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,770	\$51	\$37.94	\$1.03	6
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$9	\$41.23	\$1.12	17
	Wichita, KS	Los Angeles, CA	\$6,950	\$46	\$69.47	\$1.89	2
	Wichita, KS	New Orleans, LA	\$4,408	\$89	\$44.66	\$1.22	6
	Sioux Falls, SD	Galveston-Houston, TX	\$6,686	\$38	\$66.77	\$1.82	5
	Northwest KS	Galveston-Houston, TX	\$4,676	\$98	\$47.40	\$1.29	6
	Amarillo, TX	Los Angeles, CA	\$4,875	\$136	\$49.76	\$1.35	6
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$101	\$37.55	\$0.95	3
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0
	Des Moines, IA	Davenport, IA	\$2,258	\$21	\$22.63	\$0.57	5
	Indianapolis, IN	Atlanta, GA	\$5,191	\$0	\$51.55	\$1.31	4
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	0
	Des Moines, IA	Little Rock, AR	\$3,534	\$63	\$35.72	\$0.91	4
	Des Moines, IA	Los Angeles, CA	\$5,202	\$182	\$53.47	\$1.36	7
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,634	\$74	\$36.83	\$1.00	-6
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	0
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	0
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	0
Champaign-Urbana, IL	New Orleans, LA	\$4,495	\$101	\$45.64	\$1.24	5	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$26	\$39.52	\$1.08	2
	Wichita, KS	Galveston-Houston, TX	\$4,071	\$21	\$40.63	\$1.11	7
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	\$46	\$56.17	\$1.53	3
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$47	\$59.37	\$1.62	3
	Northwest KS	Portland, OR	\$5,643	\$160	\$57.63	\$1.57	6
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$56	\$50.20	\$1.28	4
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$51	\$49.76	\$1.26	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$101	\$35.57	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$30	\$37.04	\$0.94	6
	Des Moines, IA	Amarillo, TX	\$3,895	\$79	\$39.46	\$1.00	5
	Minneapolis, MN	Tacoma, WA	\$5,000	\$55	\$50.20	\$1.28	4
	Council Bluffs, IA	Stockton, CA	\$4,740	\$57	\$47.64	\$1.21	7
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$51	\$56.12	\$1.53	6
	Minneapolis, MN	Portland, OR	\$5,650	\$56	\$56.66	\$1.54	6
	Fargo, ND	Tacoma, WA	\$5,500	\$45	\$55.07	\$1.50	5
	Council Bluffs, IA	New Orleans, LA	\$4,525	\$116	\$46.09	\$1.25	5
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0
	Grand Island, NE	Portland, OR	\$5,460	\$164	\$55.85	\$1.52	5

¹A 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.

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

³Percentage 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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel surcharge per car ²	Tariff plus surcharge per:		Percent change ⁴ Y/Y
					metric ton ³	bushel ³	
Date: March, 2017							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,638	\$70	\$68.54	\$1.86	3
	KS	Guadalajara, JA	\$7,180	\$268	\$76.10	\$2.07	5
	TX	Salinas Victoria, NL	\$4,258	\$43	\$43.94	\$1.19	4
Corn	IA	Guadalajara, JA	\$8,187	\$220	\$85.90	\$2.18	0
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	-3
	NE	Queretaro, QA	\$7,909	\$145	\$82.30	\$2.09	2
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$142	\$75.71	\$1.92	2
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	-1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$232	\$90.72	\$2.47	2
	NE	Guadalajara, JA	\$8,942	\$235	\$93.77	\$2.55	0
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5
	KS	Torreon, CU	\$7,489	\$157	\$78.12	\$2.12	2
Sorghum	NE	Celaya, GJ	\$7,164	\$197	\$75.21	\$1.91	0
	KS	Queretaro, QA	\$7,608	\$87	\$78.62	\$2.00	2
	NE	Salinas Victoria, NL	\$6,213	\$70	\$64.19	\$1.63	2
	NE	Torreon, CU	\$6,607	\$144	\$68.98	\$1.75	1

¹Rates 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.

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

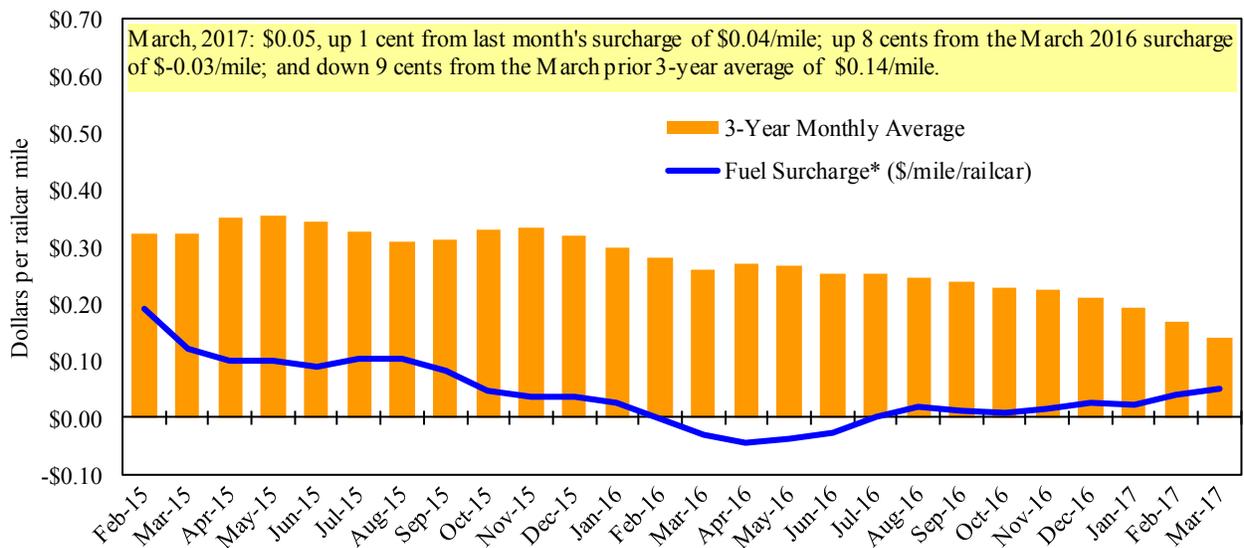
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change 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 Average¹



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

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

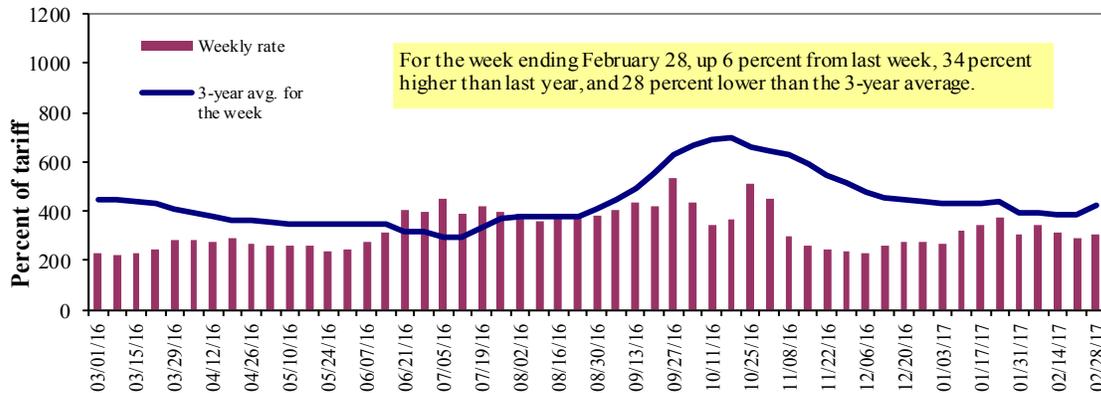
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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
Rate¹	2/28/2017	-	-	308	213	238	238	183
	2/21/2017	-	-	290	213	213	233	178
\$/ton	2/28/2017	-	-	14.29	8.50	11.16	9.62	5.75
	2/21/2017	-	-	13.46	8.50	9.99	9.41	5.59
Current week % change from the same week:								
	Last year	-	-	34	35	19	19	14
	3-year avg. ²	-	-	-28	-33	-31	-31	-28
Rate¹	April	-	295	288	205	219	219	170
	June	335	295	283	205	220	220	163

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; - closed for winter or flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

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

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

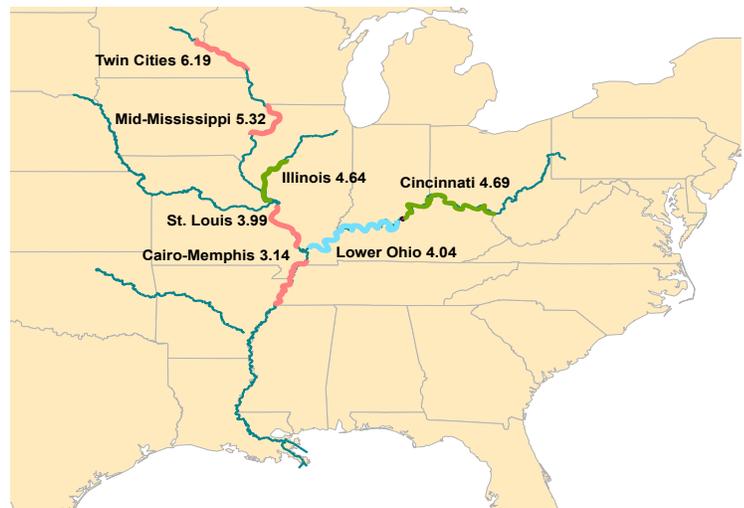
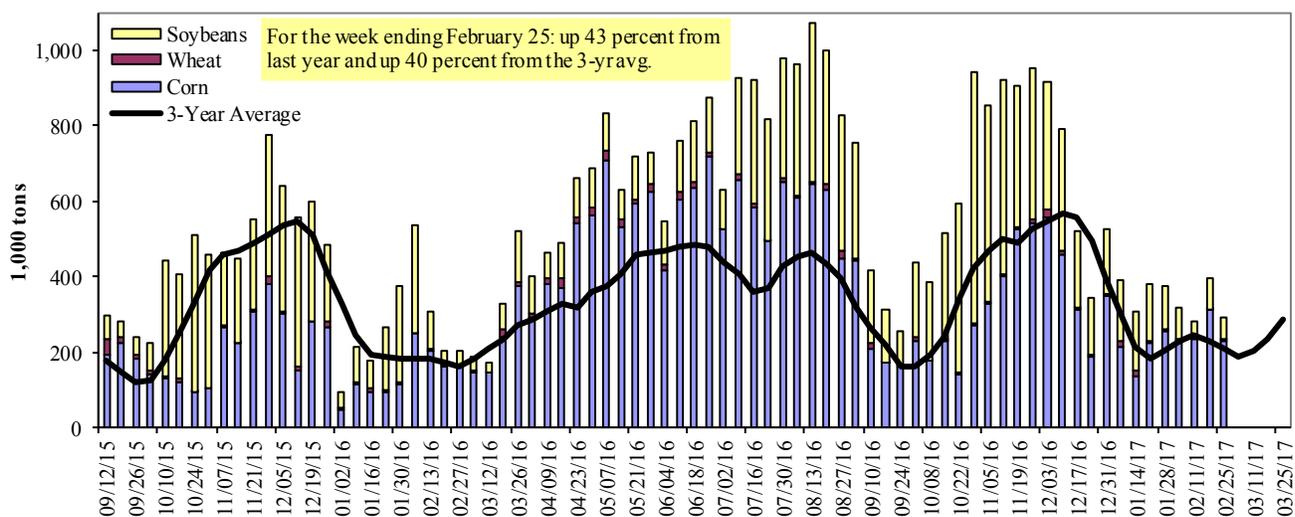


Figure 10

Barge Movements on the Mississippi River¹ (Locks 27 - Granite City, IL)



¹ 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)

For the week ending 2/25/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	20	0	9	0	29
Alton, IL (L26)	225	5	55	0	284
Granite City, IL (L27)	230	5	55	0	289
Illinois River (L8)	210	0	44	2	256
Ohio River (L52)	114	12	68	9	203
Arkansas River (L1)	3	17	27	0	46
Weekly total - 2017	346	34	150	9	538
Weekly total - 2016	260	32	160	0	452
2017 YTD ¹	2,752	269	2,369	117	5,507
2016 YTD	2,333	151	2,409	23	4,915
2017 as % of 2016 YTD	118	178	98	505	112
Last 4 weeks as % of 2016 ²	117	130	90	216	106
Total 2016	24,136	2,030	16,668	344	43,178

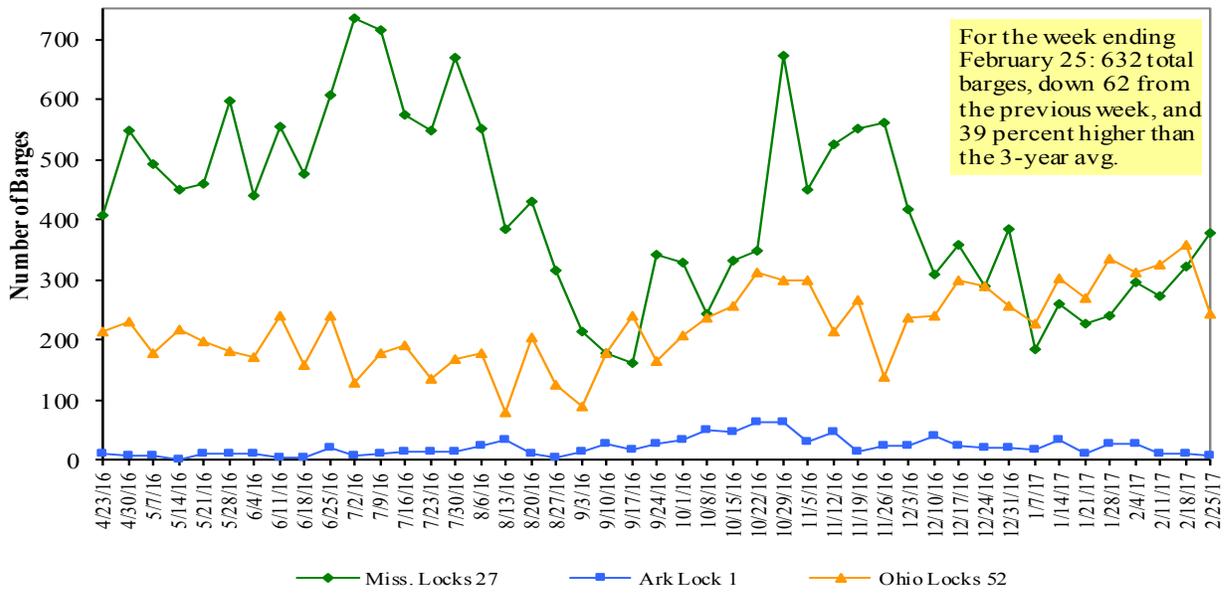
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

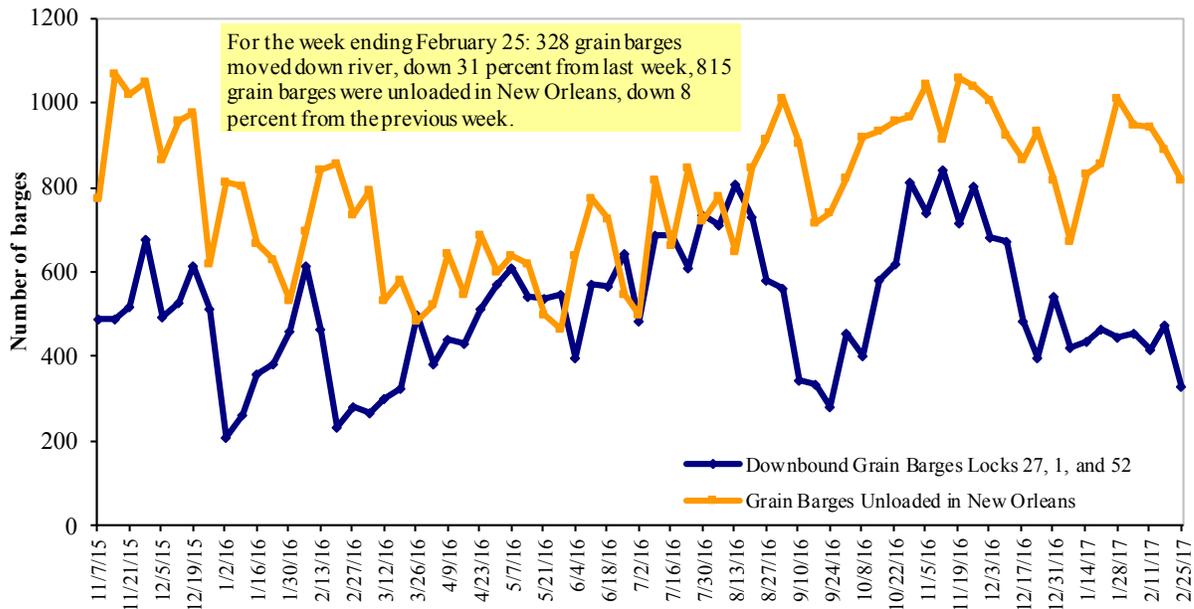
Source: U.S. Army Corps of Engineers

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 Prices¹, Week Ending 2/27/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.635	0.007	0.581
	New England	2.658	0.000	0.504
	Central Atlantic	2.772	0.002	0.601
	Lower Atlantic	2.533	0.012	0.588
II	Midwest ²	2.499	0.004	0.562
III	Gulf Coast ³	2.433	0.000	0.559
IV	Rocky Mountain	2.582	0.034	0.701
V	West Coast	2.877	0.001	0.686
	West Coast less California	2.772	0.005	0.718
	California	2.962	-0.004	0.660
Total	U.S.	2.577	0.005	0.588

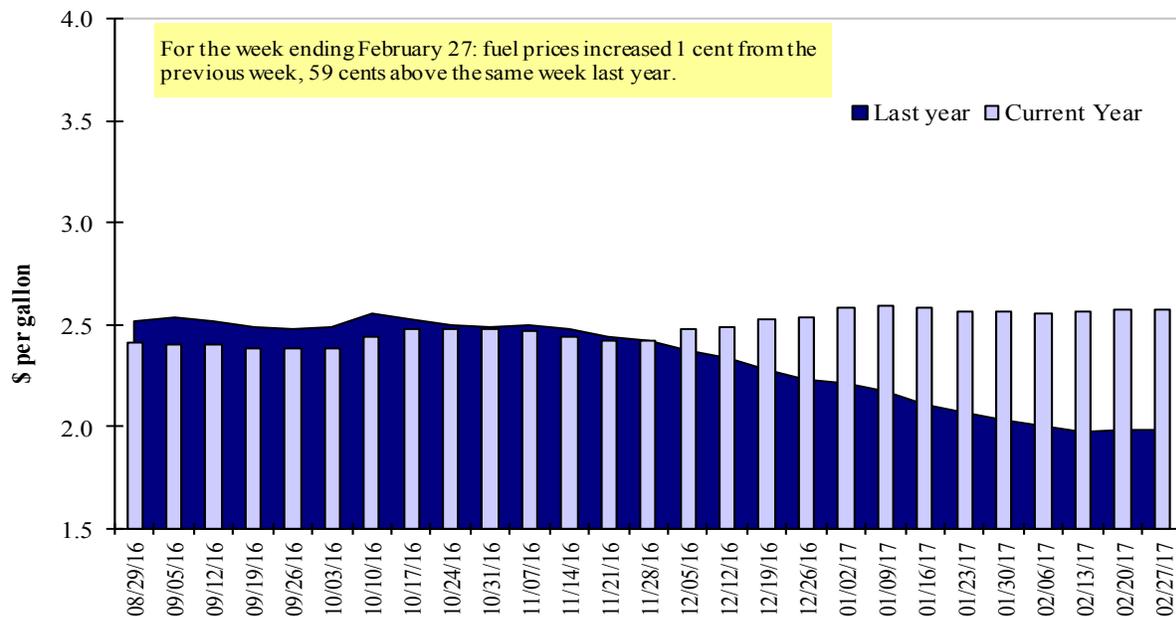
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same 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)

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
2/16/2017	2,306	564	2,437	1,414	111	6,833	19,458	9,569	35,860
This week year ago	1,157	446	1,496	810	90	3,999	12,567	5,205	21,772
Cumulative exports-marketing year²									
2016/17 YTD	7,597	1,554	5,217	2,881	306	17,554	23,258	42,583	83,395
2015/16 YTD	3,938	2,428	4,283	2,485	548	13,682	13,985	36,671	64,339
YTD 2016/17 as % of 2015/16	193	64	122	116	56	128	166	116	130
Last 4 wks as % of same period 2015/16	196	139	167	169	146	172	160	201	172
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,487
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for wheat; 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 Importers¹ of U.S. Corn

For the week ending 2/16/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	10,551	9,556	10	11,204
Japan	7,745	4,428	75	11,284
Korea	3,505	714	391	3,931
Colombia	2,908	2,902	0	4,134
Peru	2,090	1,087	92	2,109
Top 5 Importers	26,799	18,687	43	32,662
Total US corn export sales	42,716	26,552	61	46,633
% of Projected	75%	55%		
Change from prior week	743	871		
Top 5 importers' share of U.S. corn export sales	63%	70%		70%
USDA forecast, February 2017	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, February 2017	135,890	132,233	3	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>. Total commitments change from prior week could include revisions from previous week's outstanding sales or accumulated sales.

³FAS Marketing Year Ranking Reports - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 2/16/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	34,051	26,436	29	29,033
Mexico	2,769	2,300	20	3,295
Indonesia	1,321	980	35	2,065
Japan	1,584	1,554	2	1,994
Netherlands	1,182	1,157	2	1,644
Top 5 importers	40,907	32,426	26	38,032
Total US soybean export sales	52,152	41,877	25	48,389
% of Projected	93%	79%		
Change from prior week	414	259		
Top 5 importers' share of U.S. soybean export sales	78%	77%		79%
USDA forecast, February 2017	55,858	52,752	6	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/. Total commitments change from prior week could include revisions from previous week's
outstanding sales and/or accumulated sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 2/16/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,266	2,143	6	2,743
Mexico	2,640	1,959	35	2,660
Philippines	2,270	1,856	22	2,156
Brazil	1,126	385	192	2,076
Nigeria	1,258	1,380	(9)	1,978
Korea	1,190	1,056	13	1,170
China	1,061	567	87	1,770
Taiwan	889	832	7	1,005
Indonesia	848	426	99	776
Colombia	717	559	28	679
Top 10 importers	14,265	11,163	28	17,013
Total US wheat export sales	24,387	17,681	38	24,485
% of Projected	87%	84%		
Change from prior week	451	388		
Top 10 importers' share of U.S. wheat export sales	58%	63%		69%
USDA forecast, February 2017	27,929	21,117	32	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/. Total commitments change from prior week could include revisions from the previous week's
outstanding and/or accumulated sales³ 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	For the Week Ending 02/23/17	Previous Week ¹	Current Week as % of Previous	2017 YTD*	2016 YTD*	2017 YTD as % of 2016 YTD	Last 4-weeks as % of:		2016 Total ²
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	163	352	46	1,685	1,697	99	118	113	12,325
Corn	288	194	148	1,695	799	212	182	183	12,009
Soybeans	282	214	132	2,498	3,320	75	67	81	14,447
Total	732	759	96	5,878	5,815	101	99	108	38,782
Mississippi Gulf									
Wheat	118	156	76	674	512	132	145	155	3,480
Corn	961	838	115	5,544	3,394	163	194	166	31,420
Soybeans	363	727	50	6,401	6,415	100	86	92	35,278
Total	1,441	1,721	84	12,620	10,321	122	124	123	70,178
Texas Gulf									
Wheat	258	74	349	852	347	245	303	181	6,019
Corn	30	0	n/a	181	128	142	68	109	1,669
Soybeans	0	0	n/a	0	92	0	0	0	1,105
Total	288	74	389	1,032	567	182	201	148	8,792
Interior									
Wheat	27	19	139	287	169	170	147	127	1,543
Corn	151	99	152	966	831	116	131	121	7,197
Soybeans	83	113	73	834	653	128	123	111	4,577
Total	261	232	113	2,086	1,654	126	129	118	13,317
Great Lakes									
Wheat	0	0	n/a	0	0	n/a	n/a	0	1,186
Corn	0	0	n/a	0	0	n/a	n/a	n/a	584
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	910
Total	0	0	n/a	0	0	n/a	n/a	0	2,681
Atlantic									
Wheat	0	0	n/a	36	70	51	91	107	315
Corn	0	0	n/a	0	5	0	0	0	294
Soybeans	15	42	35	522	577	90	64	58	2,269
Total	15	42	35	558	652	86	66	62	2,878
U.S. total from ports²									
Wheat	566	601	94	3,533	2,795	126	147	133	24,867
Corn	1,429	1,131	126	8,386	5,156	163	178	161	53,173
Soybeans	742	1,096	68	10,255	11,058	93	81	87	58,587
Total	2,737	2,827	97	22,175	19,009	117	117	117	136,627

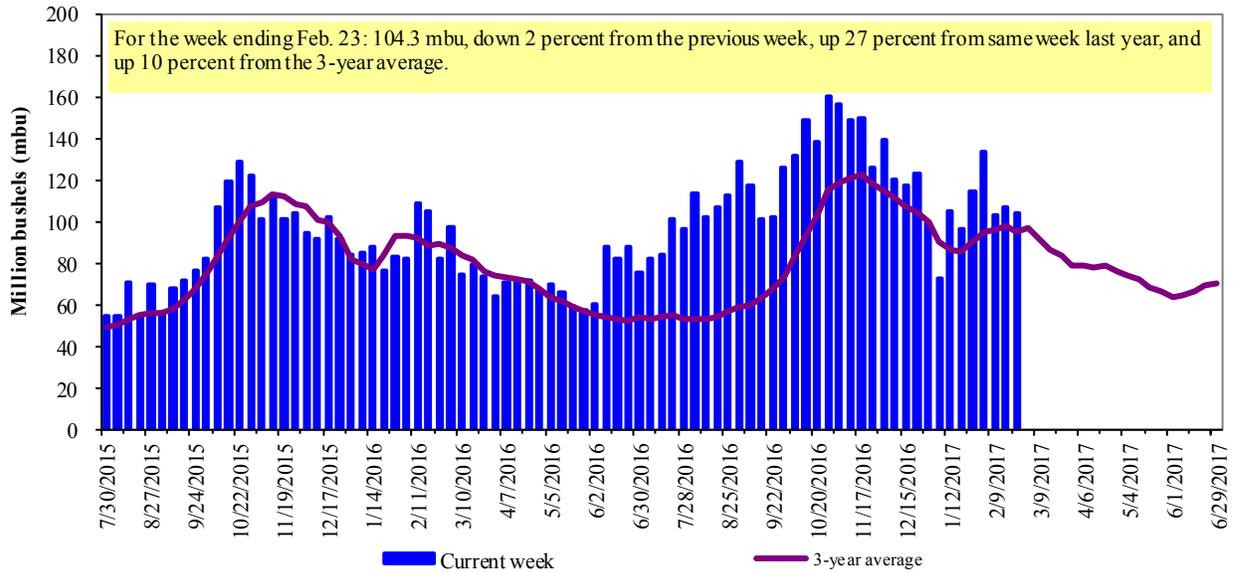
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 58 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2016.

Figure 14

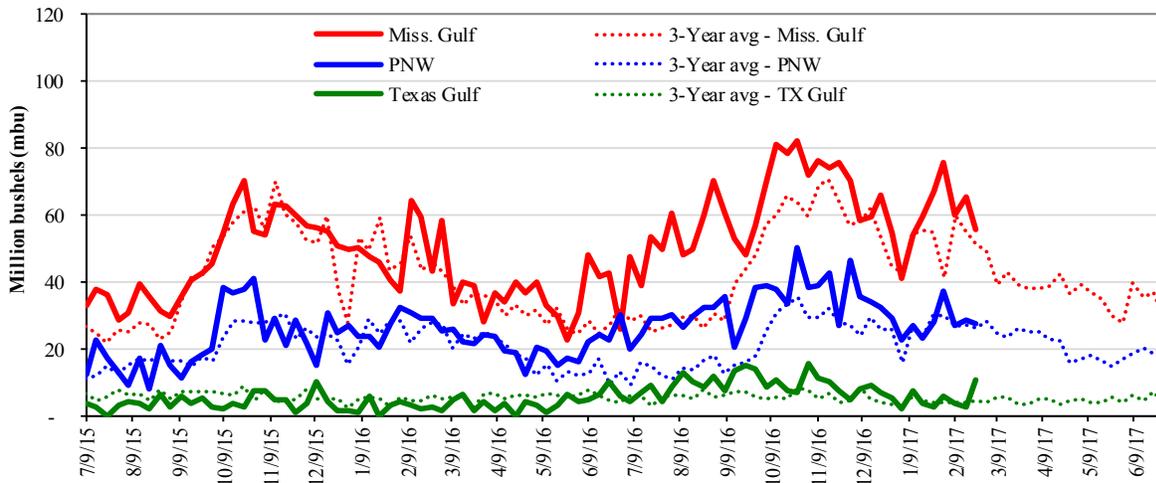
U.S. grain inspected for export (wheat, corn, and soybeans)



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 PNW¹ (wheat, corn, and soybeans)



Week ending 02/23/17 inspections (mbu):		Percent change from:				
Mississippi Gulf:	55.5	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	27.7	Last Year (same week):	down 15	up 292	down 3	down 3
Texas Gulf:	10.7	3-yr avg. (4-wk. mov. Avg):	up 29	up 355	up 46	down 4
			up 7	up 173	up 18	unchanged

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

Ocean Transportation

Table 17

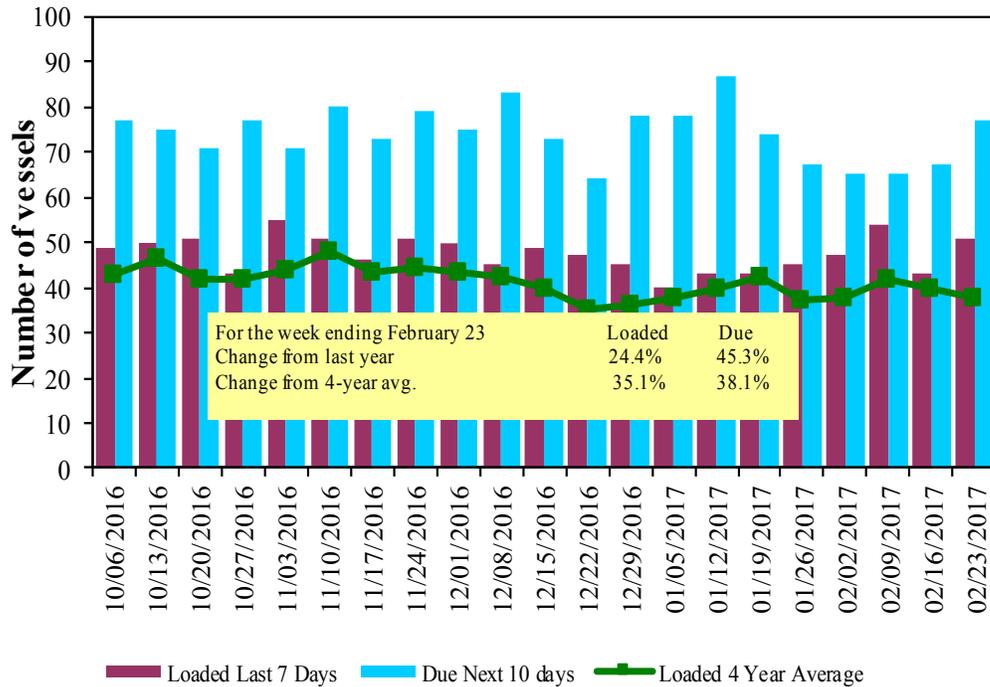
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
2/23/2017	52	51	77	44	n/a
2/16/2017	58	43	67	39	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

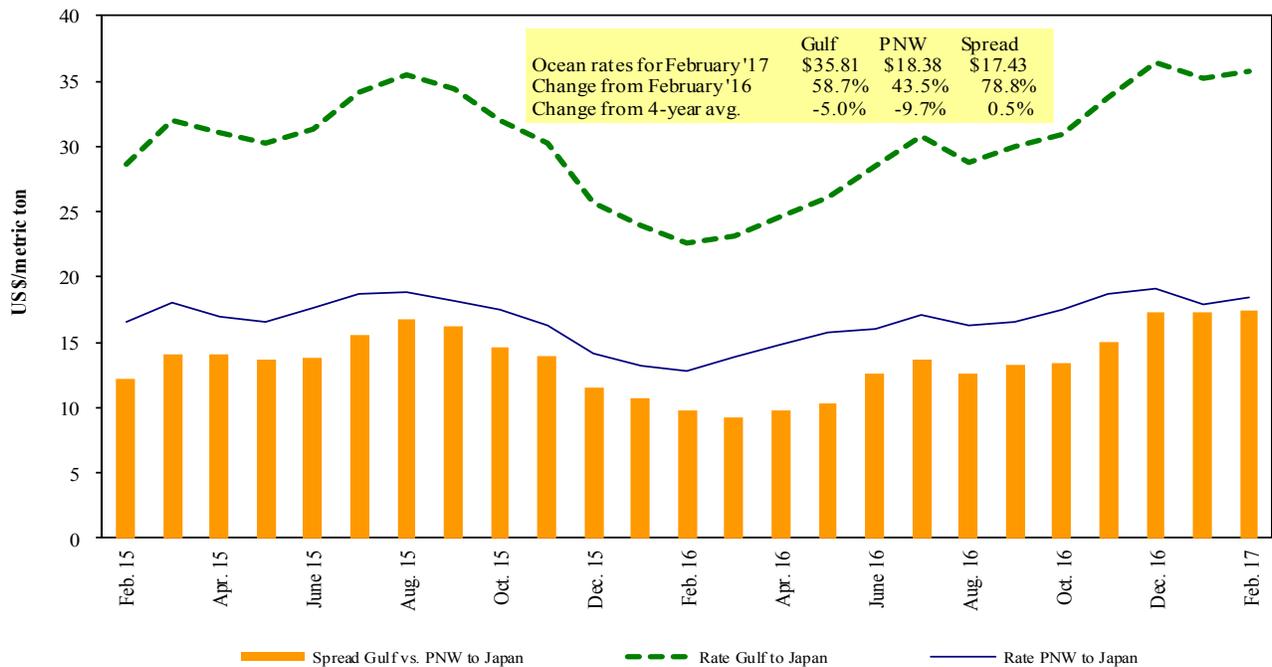
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA
¹U.S. Gulf includes Mississippi, Texas, and East Gulf

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 2/25/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Feb 15/28	60,000	23.50
U.S. Gulf	China	Heavy Grain	Jan 15/25	55,000	34.00
U.S. Gulf	China	Heavy Grain	Dec 19/24	66,000	33.90
U.S. Gulf	China	Heavy Grain	Dec 15/24	65,000	34.50
U.S. Gulf	China	Heavy Grain	Dec 14/20	53,000	34.00
U.S. Gulf	China	Heavy Grain	Dec 12/20	63,000	36.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	63,000	35.75
U.S. Gulf	Cote d'Ivoire	Rice	Jun 19/29	6,000	93.33*
U.S. Gulf	Djibouti	Sorghum	Feb 20/28	29,210	53.39*
Vancouver	China	Heavy Grain	Nov 1/10	50,000	31.50
Brazil	China	Heavy Grain	Mar 7/14	66,000	28.50
Brazil	China	Heavy Grain	May 1/5	60,000	23.50
Brazil	China	Heavy Grain	Mar 5/14	65,000	23.90 op 24.40
Brazil	China	Heavy Grain	Feb 20/28	60,000	25.15
Brazil	China	Heavy Grain	Feb 20/28	60,000	22.50
Brazil	China	Heavy Grain	Feb 8/18	60,000	23.85
Brazil	China	Soybeans	Feb 1/10	60,000	24.20
Brazil	South Korea	Heavy Grain	Mar 15/Apr 15	65,000	23.50
EC S. America	China	Heavy Grain	Mar 1/10	60,000	25.25
EC S. America	China	Heavy Grain	Feb 1/10	60,000	24.00

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

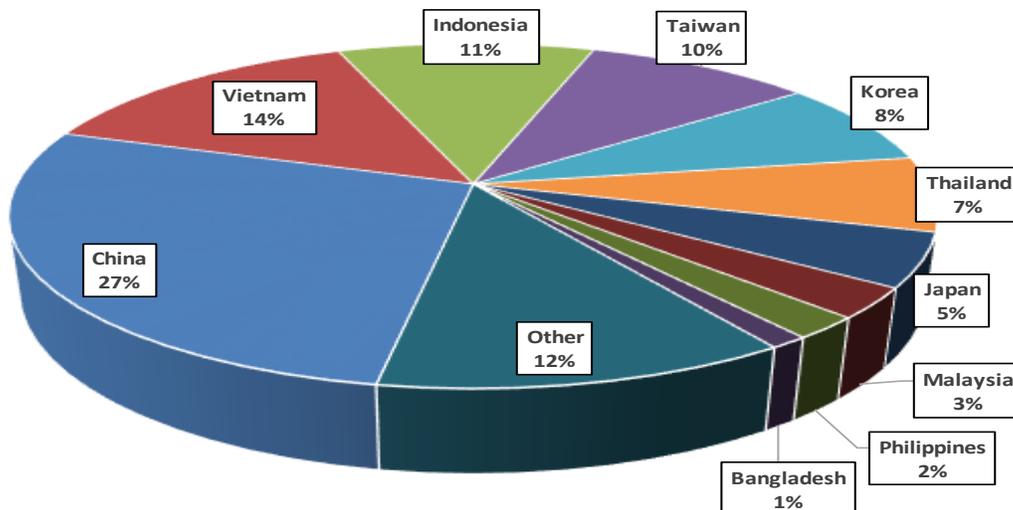
* 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2015, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 64 percent of U.S. waterborne grain exports in 2015 went to Asia, of which 12 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January-October 2016

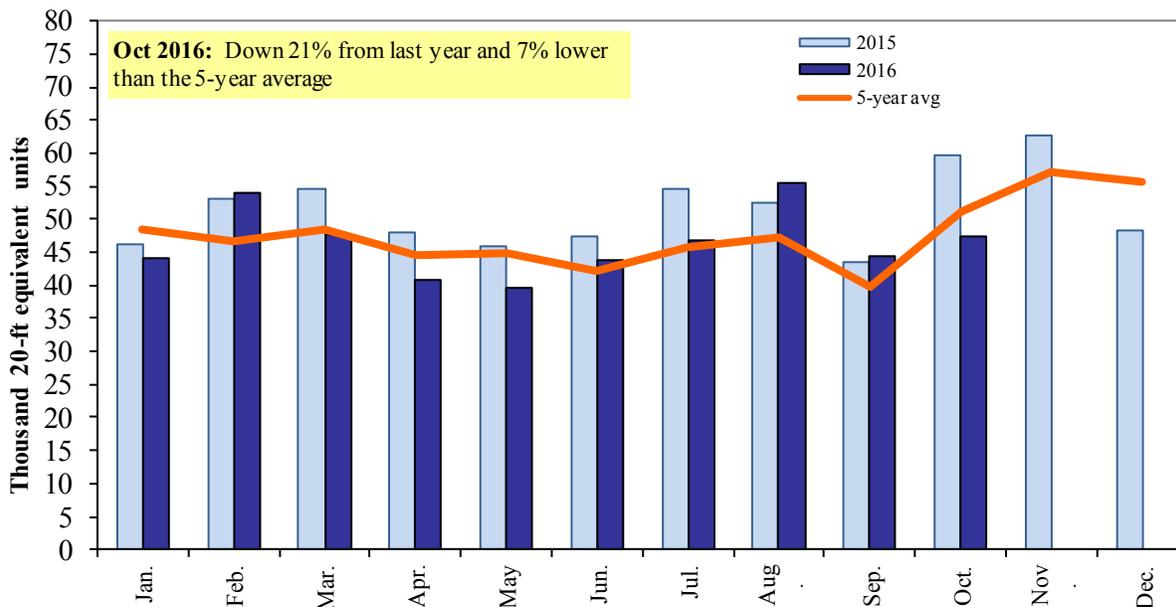


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

Contacts and Links

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