



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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Harvest Pace Slower than Average, Keeping Barge Rates Down

As of September 18, only 9 percent of the corn crop and 4 percent of the soybean crop have been harvested. Typically, 12 percent and 5 percent of the corn and soybean crops, respectively, would be harvested by now. Barge freight rates for grain have been below average but could increase with a surge in the harvest pace. As of September 20, lower Illinois River rates were 418 percent of tariff (\$19.40 per ton), 25 percent lower than the 3-year average. Two years ago, on September 23, 2014, Illinois River rates increased to 896 percent of tariff (\$41.57 per ton) in anticipation of widespread harvest activity that increased barge rates. However, a similar rate surge is unlikely as the barge supply has been adequate for current demand and there have been no late summer weekly rate increases that occurred in 2014.

Grain Inspections Recede

For the week ending September 15, **total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 2.64 million metric tons (mmt), down 15 percent from the previous week, up 40 percent from last year, and 58 percent above the 3-year average. Inspections of each of the three major grains were down from the past week. Overall, shipments of grain decreased primarily to Asia. Grain inspections decreased 12 percent in the Mississippi Gulf and 44 percent in the Pacific Northwest (PNW), as shipments to Asia decreased. Despite the drop in total grain inspections, Texas Gulf inspections jumped 79 percent from the previous week as shipments to South America increased. Outstanding export sales (unshipped) of grain are down from the previous week for wheat and corn, but up slightly for soybeans.

Panama Canal Tentatively Scheduled Lock Maintenance, Reduces Transit Capacity

The Panama Canal Authority tentatively scheduled the following maintenance and repair work: September 21-23, the West Lanes of Pedro Miguel and Gatun Locks will be closed for 3 days; September 24, the East Lane of the Gatun Locks will be closed for 12 hours. Depending on vessel mix and other factors, the estimated transit capacity of the Canal due to the maintenance work is only 22-24 vessels per day, compared to the normal transit capacity of 35-37 vessels. However, Canal authorities do not anticipate any major delays at this time. A majority of the U.S. grains are shipped through the Canal to Asian destinations.

Snapshots by Sector

Export Sales

During the week ending September 8, **unshipped balances** of wheat, corn, and soybeans totaled 43.3 mmt, up 46 percent from the same time last year. Net weekly **wheat export sales** were .402 mmt, down 39 percent from the previous week. Net **corn export sales** were .704 mmt, down 36 percent from the previous week, and net **soybean export sales** were 1 mmt, down 43 percent from the past week.

Rail

U.S. Class I railroads originated 22,599 **grain carloads** for the week ending September 10, down 8 percent from the previous week, up 26 percent from last year, and up 28 percent from the 3-year average.

Average October shuttle **secondary railcar bids/offers** per car were \$1,288 above tariff for the week ending September 15, down \$463 from last week, and \$884 higher than last year. Average non-shuttle secondary railcar bids/offers were \$275 above tariff, down \$125 from last week, and \$231 higher than last year.

Barge

For the week ending September 17, **barge grain movements** totaled 524,306 tons, 1 percent lower than last week, and up 77 percent from the same period last year.

For the week ending September 17, 334 grain barges **moved down river**, down 3 percent from last week; 715 grain barges were **unloaded in New Orleans**, down 21 percent from the previous week.

Ocean

For the week ending September 15, 46 **ocean-going grain vessels** were loaded in the Gulf, 31 percent more than the same period last year. Sixty-nine vessels are expected to be loaded within the next 10 days, 11 percent more than the same period last year.

For the week ending September 15, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$30 per metric ton, 2 percent less than the previous week. The cost of shipping from the PNW to Japan was \$16.25 per metric ton, 2 percent less than the previous week.

Fuel

During the week ending September 12, U.S. average **diesel fuel prices** decreased 1 cent from the previous week at \$2.39 per gallon, down \$0.10 from the same week last year.

Feature Article/Calendar

Grain Transportation Update

In the latest [World Agricultural Supply and Demand Estimates \(WASDE\)](#) report, USDA projected record corn and soybean production for the 2016/17 marketing year, and so far the transportation system is expected to accommodate the potential increase in grain movements with little or no strain. Total grain exports are forecast 10 percent higher than last year. Year-to-date grain rail carloads are comparable with last year's volume, despite a drop in total traffic for U.S. Class I railroads in 2016. For most of 2016, navigation conditions have been favorable on the inland waterway system and barge supply has been more than adequate for the current demand. Total grain barge deliveries to the Gulf for the year have been up 30 percent compared to the 5-year average. Ocean freight rates for shipping bulk commodities, including grain, have remained low due to overcapacity in the market. The rates are lower than last year and the 4-year average. Average diesel fuel prices have been stable the majority of the summer, however, the Energy Information Administration (EIA) forecasts prices to slowly increase through the end of the year and into 2017, as crude oil inventory supplies grow.

Production and Export Projections

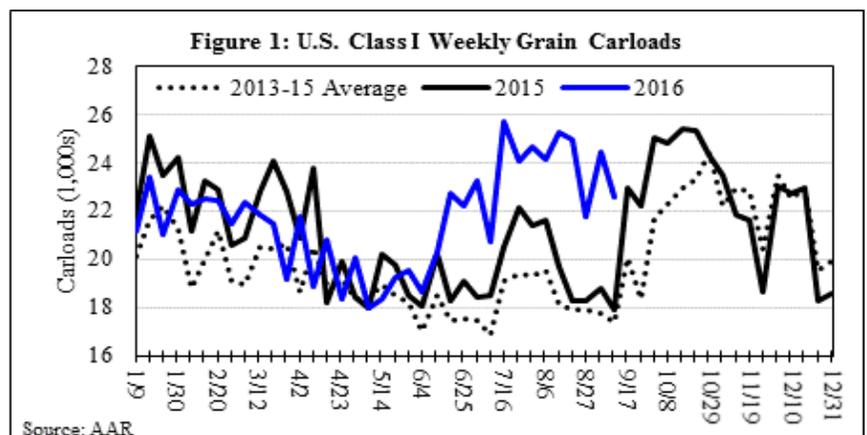
According to USDA's September [WASDE](#) report, 2016/17 crop production for the corn, soybean, and wheat crops are expected to increase from the previous year. Total production for all three crops is forecast to reach 21.6 billion bushels (bbu) this fall, 10 percent higher than the past year (table 1). USDA projects total grain exports to reach 5.1 bbu, 4 percent higher than last year. Outstanding (unshipped) export sales for each of the major grains are noticeably above the 4-week averages. Unshipped balances of corn, wheat, and soybeans are 46 percent above the same time last year ([table 12 inside the Grain Transportation Report](#)), indicating an upcoming increase in demand for rail and barge grain shipments due to larger than normal fall harvest expectations.

Table 1. Major Grains: Production and Use, September 2016 WASDE, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2016/17 (Projected)					
Production	15,093	4,201	2,321	21,615	10.4%
Exports	2,175	1,985	950	5,110	10.4%
Domestic Use	12,300	2,076	1,367	15,743	5.4%
Ending Stocks/Use	16.5%	9.0%	49.0%		
United States 2015/16 (Estimated)					
Production	13,601	3,929	2,052	19,582	-2.9%
Exports	1,915	1,940	775	4,630	1.2%
Domestic Use	11,767	2,009	1,161	14,937	-0.8%
Ending Stocks/Use	12.5%	9.2%	50.6%		
2014/15					
Production	14,216	3,927	2,026	20,169	
Exports	1,867	1,842	864	4,573	
Domestic Use	11,881	2,020	1,151	15,052	
Ending Stocks/Use	12.6%	4.9%	37.3%		

Above-Average Grain Carloads Heading into Harvest

Since early June, grain movements by rail have been particularly high (figure 1), helping the railroads offset drops in coal, chemical, and other commodity traffic. In 2015, grain accounted for 5 percent of the total carloads (8 percent of the total tonnage) originated by U.S. Class I railroads, according to the Association of American Railroads (AAR).¹ However, through September 10, year-to-date (2016) grain carloads represented 9 percent of the total U.S. Class I carloads.

Last week, the Surface Transportation Board (STB) convened its annual [National Grain Car Council](#) meeting, a session which brings together railroads, grain shippers and receivers, and railcar manufacturers to discuss rail carriers' readiness to provide service during the upcoming grain harvest. Railroads highlighted improved train velocities and indicated that they are prepared to move the upcoming (expected large) harvest. More specifically, for the 6-week period ending September 14, grain rail



¹ Association of American Railroads, [Railroads and Grain](#), July 2016.

service metrics have generally improved compared to the same period last year, though there are some signs of possible service issues with increased origin dwell times and minor delays in backlogged orders. On one hand, outstanding car orders are down 14 percent, while average grain unit train speeds are up 7 percent, [according to the STB](#). On the other hand, average origin dwell times are up 13 percent. There has also been a slight spike in backlog orders in September compared to earlier months. However, because grain car loadings have been particularly high this year, the data does not suggest any major concerns in rail service as harvest continues.

Above Average Grain Barge Traffic in 2016

As of September 17, there have been 25,405 grain barges unloaded at the Mississippi River for export during 2016, 30 percent higher than the 5-year average (table 2). With the third quarter nearly complete, the weekly average for 2016 is 60 percent higher than the average. With projections of increased corn exports and possible record soybean exports, barge movements in the fourth quarter are expected to remain at above average levels. Typically, the largest barge unloads occur in the fourth quarter as newly harvested grain and oilseeds are shipped to foreign buyers.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Y-T-D
2011	637	372	452	645	17,961
2012	626	441	501	723	19,058
2013	490	312	431	844	14,673
2014	760	569	528	856	22,724
2015	700	561	614	877	22,922
average	643	451	505	789	19,468
2016	667	606	805		25,405

Source: USDA/GIPSA¹

For most of 2016, navigation conditions have been favorable and barge supply has been more than adequate for the current demand. Current spot rates are significantly below average despite relatively high tonnages moving on the system, which may be explained by an unknown portion of current weekly tonnages being moved by pre-arranged freight rates by contract and plentiful barge supply. On August 23, the forward rate for September barge freight was 425 percent of tariff (\$16.96 per ton). However, as of September 20, St. Louis to New Orleans spot barge rate dropped to 313 percent of tariff

(\$12.49 per ton), 48 percent lower than the 5-year average. While rates are lower than average now at the beginning of harvest, a surge in the pace of harvest could increase barge demand and raise rates.

Dry-Bulk Freight Rates Continued to Remain Low

Ocean freight rates for shipping bulk commodities, including grain, remained low as excess vessel supply persists in the market. The rates are still lower than last year and the 4-year average. As of September 15, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$30 per metric ton (mt), a 12-percent decline from the same period last year, and 33 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest was \$16.250 per mt, a 10 percent decline from last year, and a 35 percent decline from the 4-year average. Grain loading activity in the U.S. Gulf continued to be strong. During the past 4 weeks, an average of 49 ocean-going grain vessels were loaded per week, and 45 vessels were either being loaded or waiting to be loaded. An additional average of 67 vessels were expected to be loaded in the next 10 days. Ocean freight rates should continue to remain low at least in the near term until freight markets improve sufficiently to soak up the excess vessel capacity.

Diesel Prices Forecast to be Higher in 2017

Over the past 18 weeks, diesel prices have fluctuated within the \$2.30-\$2.43 range per gallon. Prices rose nearly 44 cents from the lowest diesel price recorded since 2005 at the end of February to mid-June when average retail prices were \$2.43 per gallon. From mid-June to mid-August, the market reacted with a steady decline in prices to end at \$2.30. However, the report of a possible cut in OPEC production sent average prices up 10 cents per gallon during the last 2 weeks in August. The average diesel price is forecast to average \$2.31 per gallon in 2016 and \$2.70 per gallon in 2017. The EIA recently reported that global oil inventories and U.S. oil rig counts have continued to increase; however, the inventory build is slowing, compared to the levels that occurred in 2015 and early 2016. EIA also reported the market is expected to put upward pressure on prices while the trading range is maintained between \$40 and \$50 per barrel during the next two quarters.

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¹ GIPSA sets a standard weight of 3,648,000 pounds per barge

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit	Train	Shuttle	Gulf	Pacific
09/21/16	160	273	261	232	134	115
09/14/16	161	272	211	241	136	117

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)

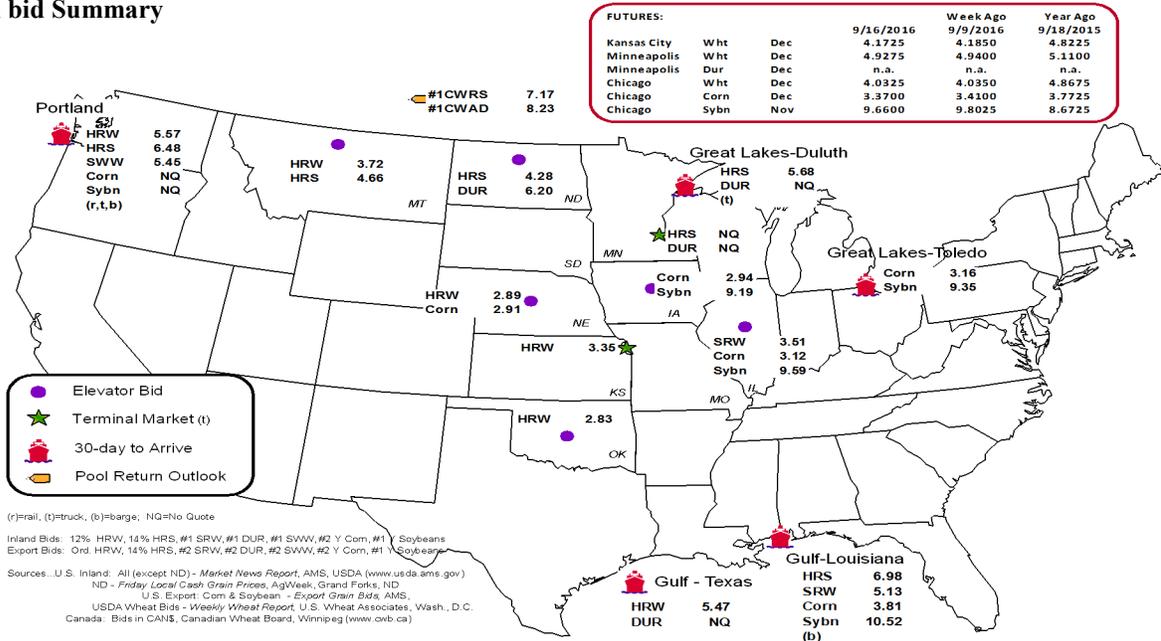
Commodity	Origin--Destination	9/16/2016	9/9/2016
Corn	IL--Gulf	-0.69	-0.69
Corn	NE--Gulf	-0.90	-0.92
Soybean	IA--Gulf	-1.33	-1.36
HRW	KS--Gulf	-2.12	-1.87
HRS	ND--Portland	-2.20	-2.37

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)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
9/14/2016 ^p	762	2,490	5,506	411	9,169	9/10/2016	2,521
9/07/2016 ^r	1,298	2,449	7,999	173	11,919	9/3/2016	1,842
2016 YTD ^r	15,863	56,387	192,319	12,835	277,404	2016 YTD	75,016
2015 YTD ^r	12,873	42,210	141,888	15,220	212,191	2015 YTD	66,596
2016 YTD as % of 2015 YTD	123	134	136	84	131	% change YTD	113
Last 4 weeks as % of 2015 ²	1,905	216	270	193	274	Last 4wks % 2015	98
Last 4 weeks as % of 4-year avg. ²	717	155	228	193	219	Last 4wks % 4 yr	116
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2015 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.

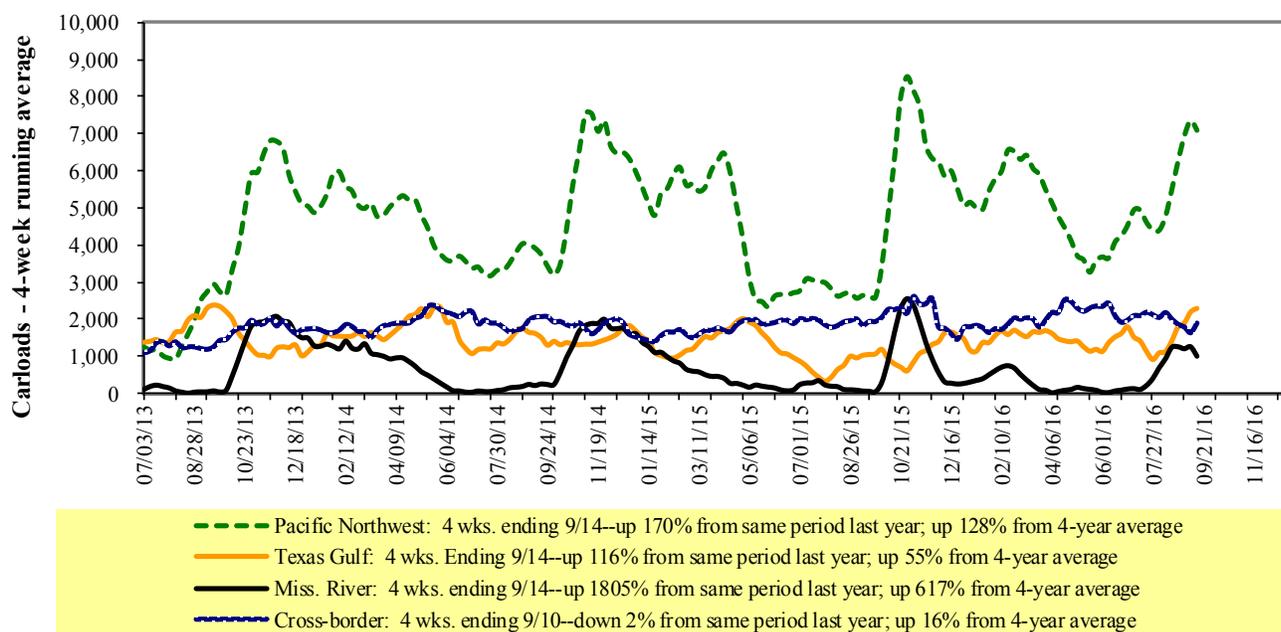
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

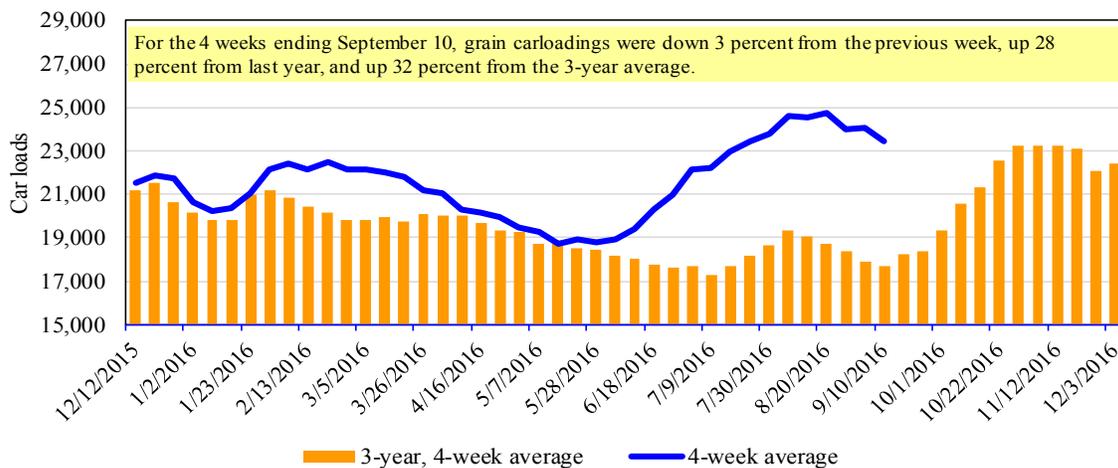
For the week ending:	East		West			U.S. total	Canada	
	9/10/2016	CSXT	NS	BNSF	KCS		UP	CN
This week	1,343	1,955	12,084	482	6,735	22,599	3,251	4,543
This week last year	919	2,205	9,086	1,073	4,614	17,897	3,366	4,582
2016 YTD	60,523	99,028	395,727	29,983	196,672	781,933	119,332	156,943
2015 YTD	70,226	104,192	352,654	31,460	182,822	741,354	143,248	160,838
2016 YTD as % of 2015 YTD	86	95	112	95	108	105	83	98
Last 4 weeks as % of 2015*	105	107	137	80	134	128	100	96
Last 4 weeks as % of 3-yr avg.**	108	122	140	80	138	132	90	93
Total 2015	104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

*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:		<u>Delivery period</u>							
9/15/2016		Oct-16	Oct-15	Nov-16	Nov-15	Dec-16	Dec-15	Jan-17	Jan-16
BNSF ³	COT grain units	no bids	11	no bids	no bids	no bids	no bids	no bids	no bids
	COT grain single-car ⁵	281	0..17	185	no bids	11	no bids	26	no bids
UP ⁴	GCAS/Region 1	no offer	no bids	no offer	10	no offer	no bids	n/a	n/a
	GCAS/Region 2	no offer	10	no offer	10	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.

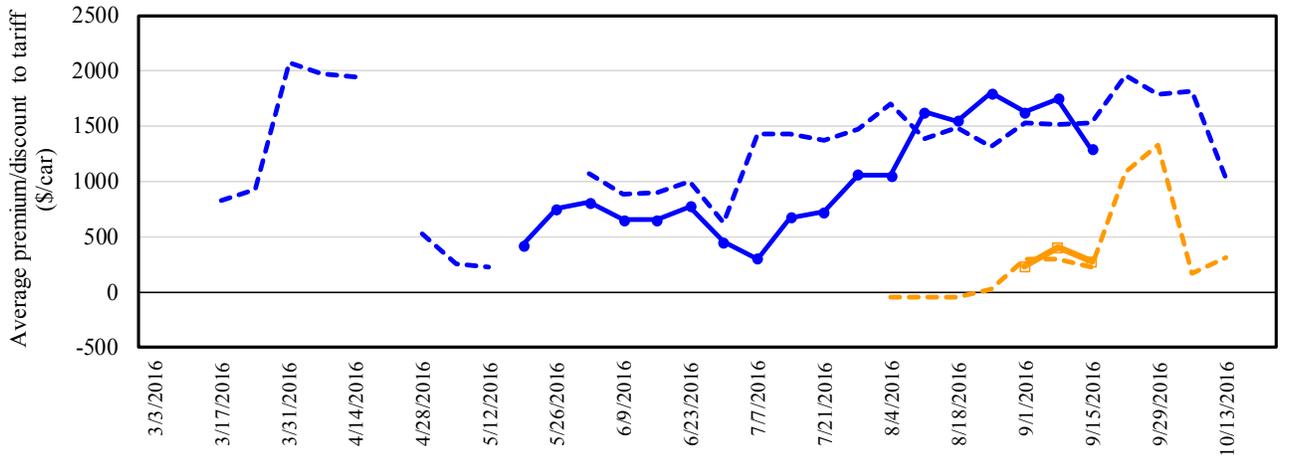
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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 October 2016, Secondary Market



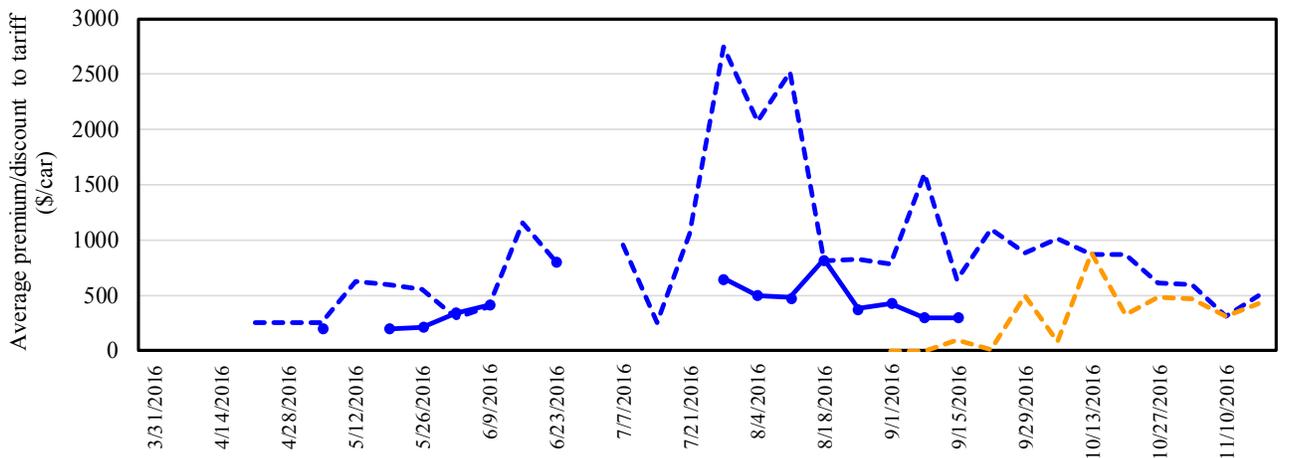
9/15/2016	BNSF	UP
Non-Shuttle	\$200	\$350
Shuttle	\$1,575	\$1,000

Shuttle
 Shuttle prior 3-yr avg. (same week)
 Non-Shuttle
 Non-Shuttle prior 3-yr avg. (same week)

Average Non-shuttle bids/offers fell \$125 this week, and are \$125 below the peak.
 Average Shuttle bids/offers fell \$463 this week and are \$513 below the peak.

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 November 2016, Secondary Market



9/15/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	\$300

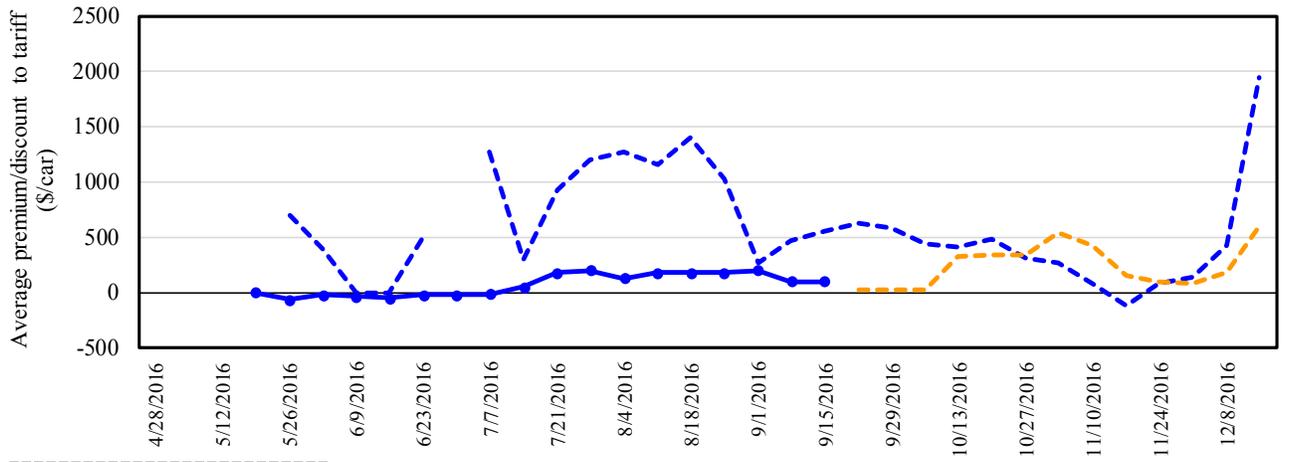
Shuttle
 Shuttle prior 3-yr avg. (same week)
 Non-Shuttle
 Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers are unchanged this week and are \$525 below the peak.

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 December 2016, Secondary Market



9/15/2016	BNSF	UP	Shuttle	Non-Shuttle
Non-Shuttle	n/a	n/a	Shuttle prior 3-yr avg. (same week)	Non-Shuttle prior 3-yr avg. (same week)
Shuttle	n/a	\$100	There were no Non-Shuttle bids/offers this week. Average Shuttle bids/offers are unchanged this week and are \$100 below the peak.	

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					
		9/15/2016	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17
Non-shuttle	BNSF-GF	200	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	150	n/a	n/a	n/a	n/a	n/a
	UP-Pool	350	n/a	n/a	n/a	n/a	n/a
	Change from last week	(250)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	312	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	1575	n/a	n/a	n/a	n/a	n/a
	Change from last week	(425)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	1025	n/a	n/a	n/a	n/a	n/a
	UP-Pool	1000	300	100	n/a	n/a	n/a
	Change from last week	(500)	0	0	n/a	n/a	n/a
	Change from same week 2015	742	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

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
9/1/2016	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$35	\$36.15	\$0.98	-1	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	-\$6	\$41.08	\$1.12	15	
	Wichita, KS	Los Angeles, CA	\$6,950	-\$31	\$68.71	\$1.87	-2	
	Wichita, KS	New Orleans, LA	\$4,243	\$62	\$42.75	\$1.16	-1	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$25	\$64.16	\$1.75	-2	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$68	\$45.47	\$1.24	-1	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$95	\$47.72	\$1.30	-2	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$70	\$37.25	\$0.95	8	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	9	
	Des Moines, IA	Davenport, IA	\$2,168	\$15	\$21.68	\$0.55	-1	
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$49.69	\$1.26	5	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	5	
Soybeans	Des Moines, IA	Little Rock, AR	\$3,444	\$44	\$34.64	\$0.88	3	
	Des Moines, IA	Los Angeles, CA	\$5,052	\$128	\$51.44	\$1.31	1	
	Minneapolis, MN	New Orleans, LA	\$3,799	\$30	\$38.02	\$1.03	-4	
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	8	
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	10	
Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	4		
Champaign-Urbana, IL	New Orleans, LA	\$4,395	\$70	\$44.34	\$1.21	9		
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	-\$18	\$39.08	\$1.06	-2	
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$14	\$38.30	\$1.04	-3	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	16	
	Grand Forks, ND	Portland, OR	\$5,611	-\$30	\$55.42	\$1.51	-3	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	-\$32	\$58.58	\$1.59	-11	
	Northwest KS	Portland, OR	\$5,478	\$112	\$55.51	\$1.51	-2	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$37	\$49.28	\$1.25	-7
Sioux Falls, SD		Tacoma, WA	\$4,960	-\$34	\$48.92	\$1.24	-6	
Champaign-Urbana, IL		New Orleans, LA	\$3,481	\$70	\$35.27	\$0.90	8	
Lincoln, NE		Galveston-Houston, TX	\$3,600	-\$20	\$35.55	\$0.90	-3	
Des Moines, IA		Amarillo, TX	\$3,795	\$55	\$38.23	\$0.97	3	
Minneapolis, MN		Tacoma, WA	\$5,000	-\$37	\$49.29	\$1.25	-7	
Council Bluffs, IA		Stockton, CA	\$4,640	-\$38	\$45.70	\$1.16	-3	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	-\$34	\$54.18	\$1.47	-6	
	Minneapolis, MN	Portland, OR	\$5,510	-\$37	\$54.35	\$1.48	-7	
	Fargo, ND	Tacoma, WA	\$5,380	-\$30	\$53.13	\$1.45	-6	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$81	\$44.75	\$1.22	-2	
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	10	
Grand Island, NE	Portland, OR	\$5,360	\$115	\$54.37	\$1.48	-2		

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

Effective date: 9/1/2016			Fuel				Percent
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	-4
	OK	Cuautitlan, EM	\$6,514	\$49	\$67.05	\$1.82	-5
	KS	Guadalajara, JA	\$6,995	\$102	\$72.51	\$1.97	-4
	TX	Salinas Victoria, NL	\$4,142	\$28	\$42.61	\$1.16	0
Corn	IA	Guadalajara, JA	\$8,137	\$97	\$84.13	\$2.14	-5
	SD	Celaya, GJ	\$7,480	\$0	\$76.43	\$1.94	-6
	NE	Queretaro, QA	\$7,879	\$92	\$81.44	\$2.07	1
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	6
	MO	Tlalhepantla, EM	\$7,238	\$89	\$74.87	\$1.90	2
	SD	Torreon, CU	\$7,080	\$0	\$72.34	\$1.84	-2
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$98	\$89.40	\$2.43	2
	NE	Guadalajara, JA	\$9,142	\$103	\$94.46	\$2.57	1
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	0
	KS	Torreon, CU	\$7,439	\$75	\$76.77	\$2.09	2
Sorghum	NE	Celaya, GJ	\$7,344	\$91	\$75.96	\$1.93	-2
	KS	Queretaro, QA	\$7,563	\$61	\$77.89	\$1.98	-1
	NE	Salinas Victoria, NL	\$6,168	\$49	\$63.52	\$1.61	3
	NE	Torreon, CU	\$6,672	\$72	\$68.91	\$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.

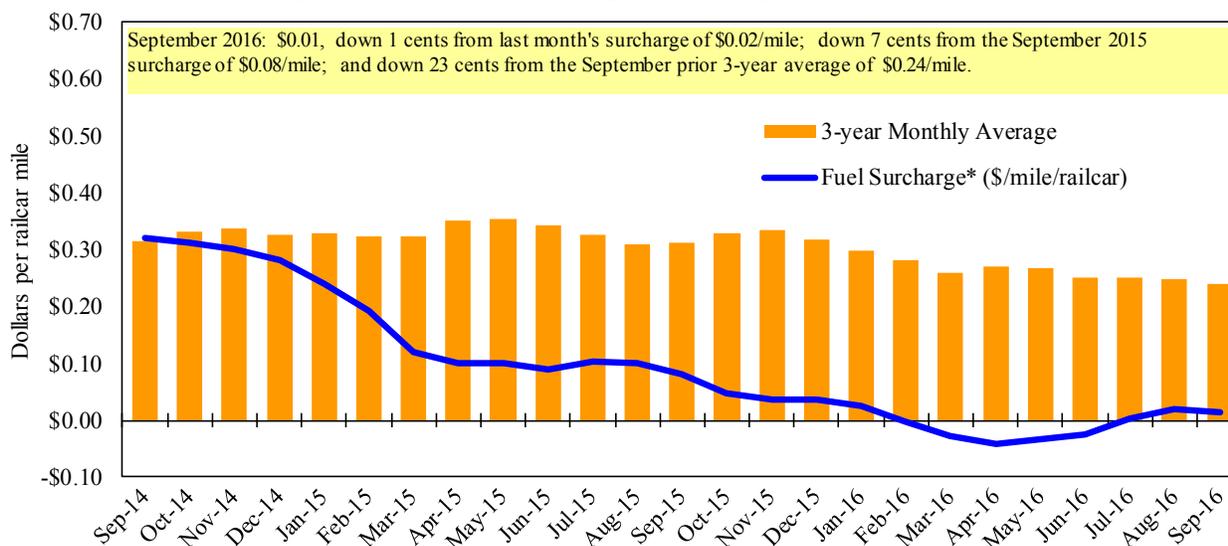
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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.

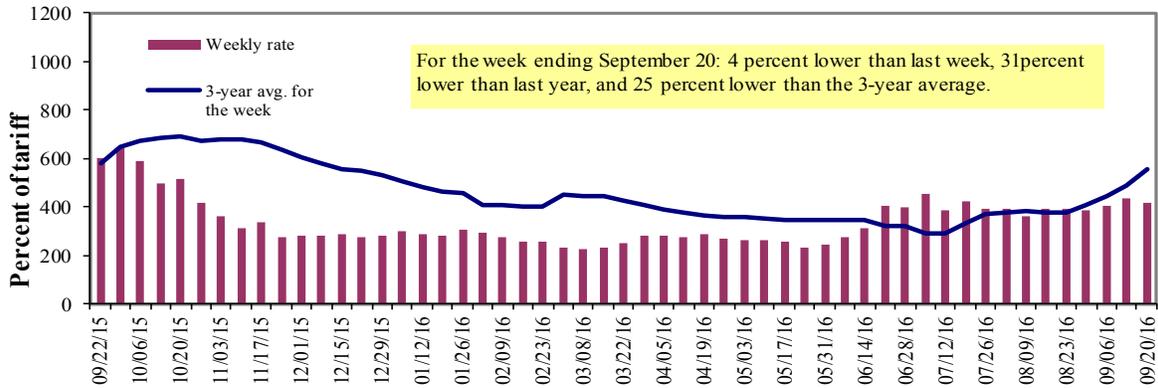
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	9/20/2016	473	443	418	313	430	430	313
	9/13/2016	473	442	433	333	438	438	338
\$/ton	9/20/2016	29.28	23.57	19.40	12.49	20.17	17.37	9.83
	9/13/2016	29.28	23.51	20.09	13.29	20.54	17.70	10.61
Current week % change from the same week:								
	Last year	-21	-26	-31	-41	-38	-38	-38
	3-year avg. ²	-11	-18	-25	-42	-27	-27	-42
Rate¹	October	573	513	513	408	523	523	413
	December	-	-	393	275	360	360	263

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

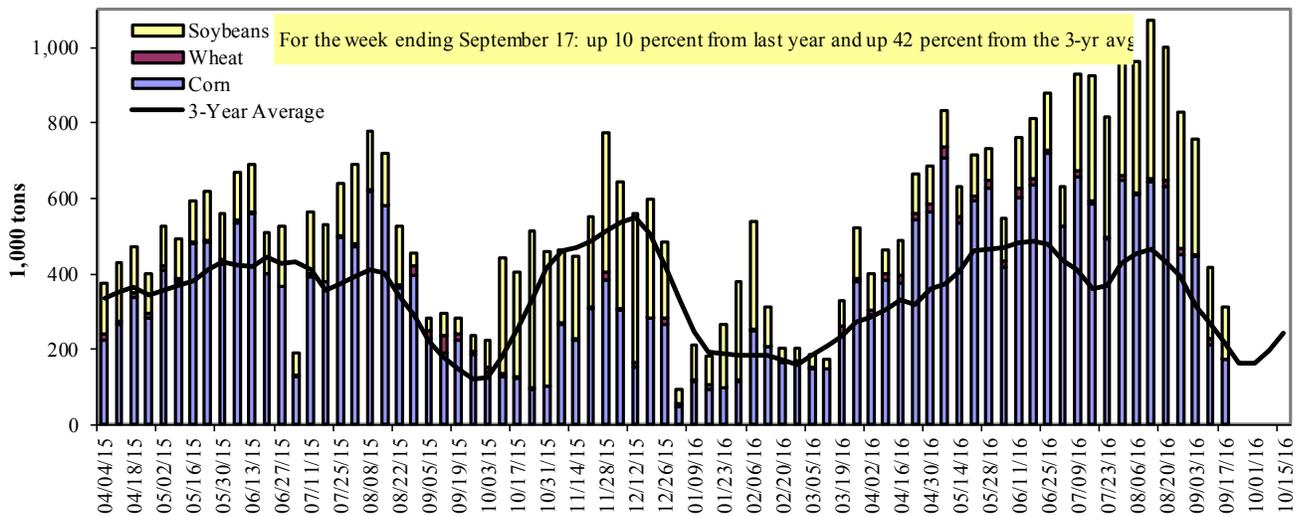
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton})/100$$

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 9/17/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	73	3	65	2	142
Winfield, MO (L25)	109	5	80	6	200
Alton, IL (L26)	167	2	124	6	299
Granite City, IL (L27)	172	2	138	6	318
Illinois River (L8)	48	0	8	0	56
Ohio River (L52)	83	7	25	0	115
Arkansas River (L1)	6	63	22	0	91
Weekly total - 2016	261	72	185	6	524
Weekly total - 2015	156	43	93	3	296
2016 YTD ¹	18,263	1,671	8,903	257	29,093
2015 YTD	15,063	1,450	6,779	196	23,488
2016 as % of 2015 YTD	121	115	131	131	124
Last 4 weeks as % of 2015 ²	158	76	424	180	195
Total 2015	19,215	1,686	14,191	359	35,451

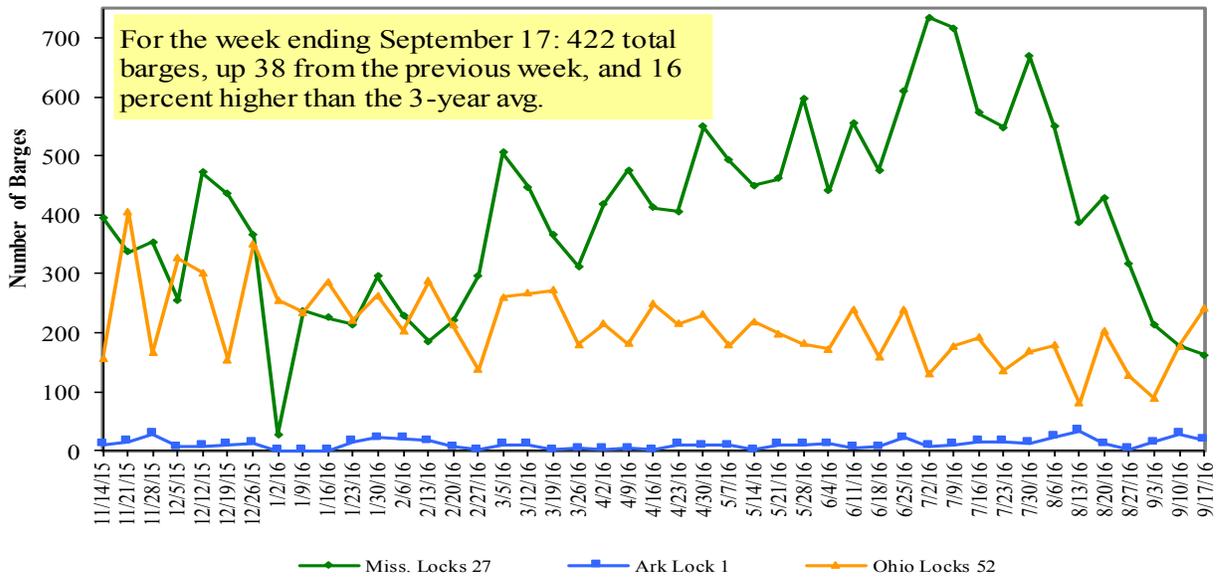
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

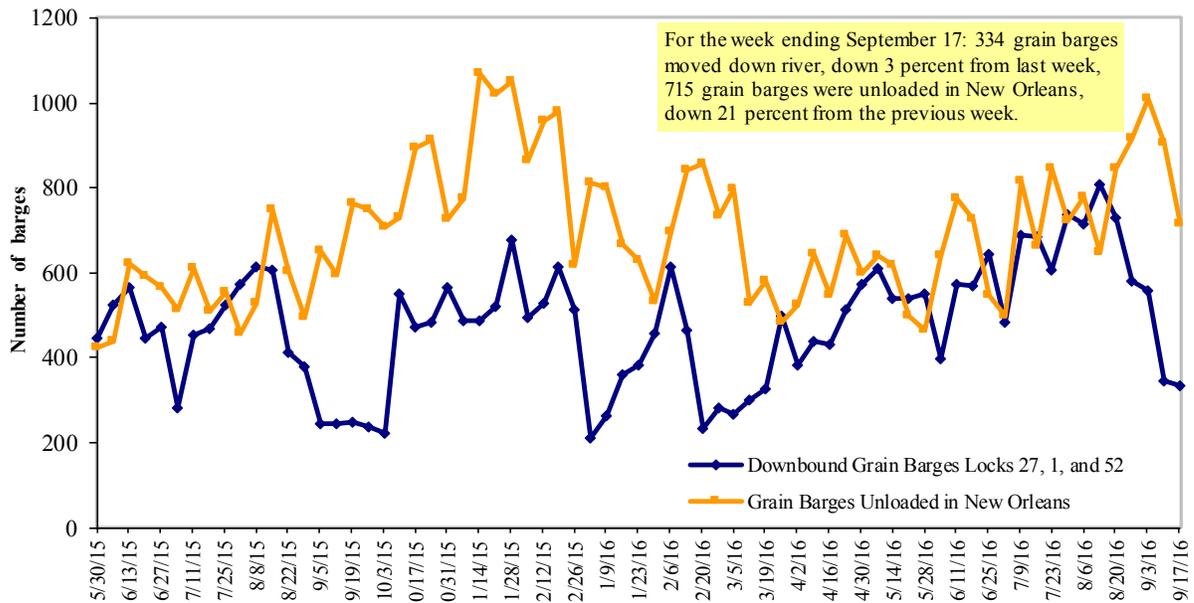
Source: U.S. Army Corps of Engineers

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 09/19/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.391	-0.008	-0.157
	New England	2.405	-0.005	-0.208
	Central Atlantic	2.485	-0.010	-0.177
	Lower Atlantic	3.275	-0.007	-0.132
II	Midwest ²	2.366	-0.010	-0.081
III	Gulf Coast ³	2.242	-0.014	-0.098
IV	Rocky Mountain	2.482	-0.007	-0.040
V	West Coast	2.652	-0.014	-0.062
	West Coast less California	2.524	-0.029	-0.026
	California	2.754	-0.002	-0.094
Total	U.S.	2.389	-0.010	-0.104

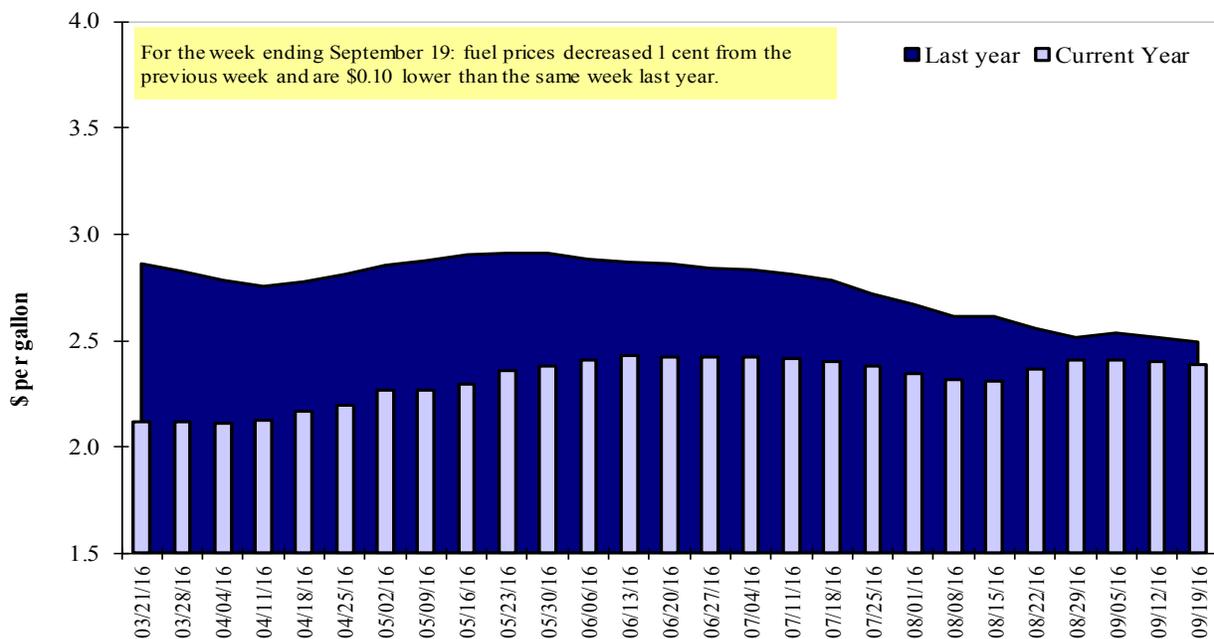
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
9/8/2016	2,193	505	1,633	933	78	5,341	15,619	22,317	43,277
This week year ago	1,284	711	1,747	948	163	4,851	8,265	16,584	29,701
Cumulative exports-marketing year²									
2016/17 YTD	3,189	652	2,395	1,206	125	7,567	1,428	1,228	10,223
2015/16 YTD	1,729	1,249	1,595	934	338	5,844	1,074	328	7,246
YTD 2016/17 as % of 2015/16	184	52	150	129	37	129	133	375	141
Last 4 wks as % of same period 2015/16	173	82	100	104	61	116	127	78	98
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 9/8/2016	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 -
Japan	2,410	1,687	43	10,997
Mexico	4,226	3,562	19	11,542
Korea	851	123	592	3,933
Colombia	758	585	30	3,994
Taiwan	618	175	252	1,991
Top 5 Importers	8,861	6,132	45	32,457
Total US corn export sales	17,046	9,339	83	47,026
% of Projected	31%	19%		
Change from prior week	704	533		
Top 5 importers' share of U.S. corn export sales	52%	66%		69%
USDA forecast, September 2016	55,344	48,728	14	
Corn Use for Ethanol USDA forecast, September 2016	133,985	132,080	1	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - 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
Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>

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 9/08/2016	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	9,896	6,528	52	29,033
Mexico	1,135	986	15	3,295
Indonesia	246	169	46	2,065
Japan	544	765	(29)	1,994
Taiwan	442	318	39	1,226
Top 5 importers	12,262	8,765	40	37,614
Total US soybean export sales	23,545	16,912	39	39,169
% of Projected	44%	32%		
Change from prior week	1,019	847		
Top 5 importers' share of U.S. soybean export sales	52%	52%		96%
USDA forecast, September 2016	54,087	52,861	2	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - 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's³ 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 9/08/2016	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	1,113	1,013	10	2,743
Mexico	1,161	1,085	7	2,660
Nigeria	606	905	(33)	1,978
Philippines	1,345	956	41	2,156
Brazil	813	292	179	2,076
Korea	673	567	19	1,170
Taiwan	432	505	(14)	1,005
Indonesia	378	120	215	776
Colombia	400	299	34	679
Thailand	259	144	80	618
Top 10 importers	6,921	5,740	21	15,861
Total US wheat export sales	12,909	10,696	21	24,485
% of Projected	50%	51%		
Change from prior week	402	339		
Top 10 importers' share of U.S. wheat export sales	54%	54%		65%
USDA forecast, September 2016	25,886	21,117	23	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - 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 09/15/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of:		2015 Total*
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	266	304	87	9,149	7,873	116	113	96	10,985
Corn	264	424	62	9,517	6,875	138	274	404	7,232
Soybeans	0	212	0	5,263	4,087	129	2224	4741	11,809
Total	529	940	56	23,930	18,835	127	190	191	30,027
Mississippi Gulf									
Wheat	12	166	7	2,721	3,493	78	53	43	4,504
Corn	650	705	92	22,992	21,672	106	144	151	26,701
Soybeans	737	727	101	17,239	13,168	131	321	488	29,593
Total	1,399	1,598	88	42,952	38,333	112	180	197	60,797
Texas Gulf									
Wheat	241	185	130	3,766	2,892	130	198	124	3,724
Corn	109	11	1,025	1,181	450	263	368	532	596
Soybeans	0	0	n/a	92	210	44	n/a	0	864
Total	351	196	179	5,039	3,552	142	227	156	5,184
Interior									
Wheat	62	75	83	1,029	1,060	97	119	115	1,388
Corn	198	114	174	5,125	4,539	113	102	128	6,201
Soybeans	22	56	40	2,821	2,144	132	172	228	3,518
Total	282	245	115	8,975	7,743	116	114	137	11,106
Great Lakes									
Wheat	11	52	21	677	727	93	85	133	997
Corn	0	61	0	449	454	99	153	283	485
Soybeans	0	0	n/a	159	89	180	n/a	n/a	733
Total	11	113	10	1,285	1,270	101	106	174	2,216
Atlantic									
Wheat	0	1	0	200	473	42	4	2	520
Corn	36	1	n/a	85	147	57	76	59	277
Soybeans	35	3	1,309	1,086	993	109	723	1236	2,053
Total	71	5	1,452	1,371	1,613	85	108	72	2,850
U.S. total from ports**									
Wheat	592	783	76	17,542	16,519	106	108	87	22,118
Corn	1,257	1,316	96	39,348	34,137	115	164	190	41,492
Soybeans	795	998	80	26,661	20,689	129	335	503	48,570
Total	2,643	3,097	85	83,550	71,346	117	174	181	112,180

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

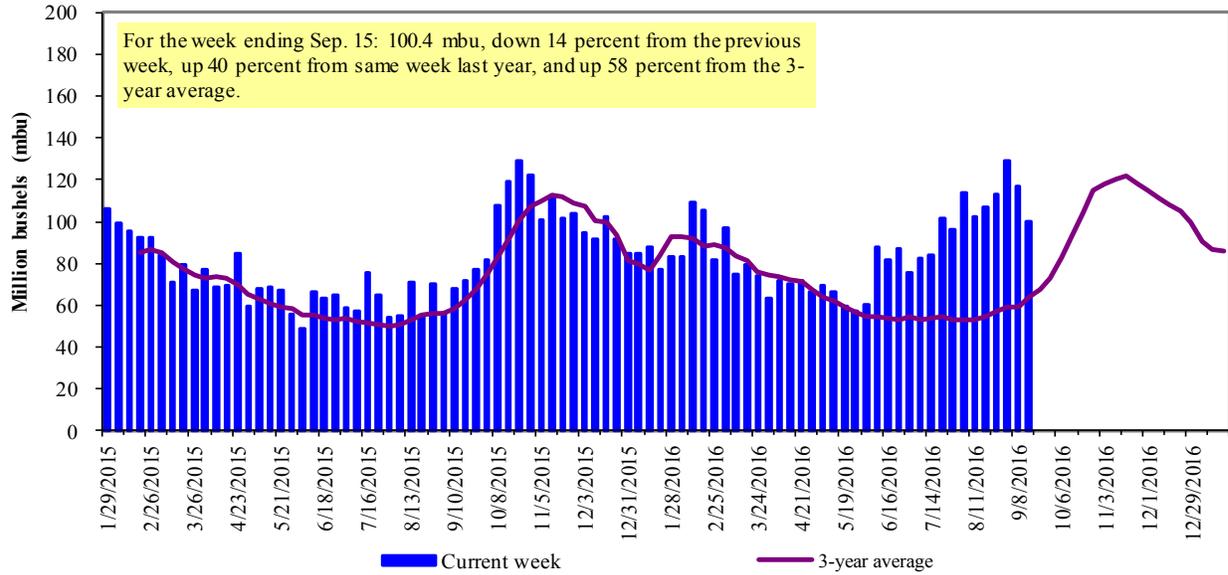
**Total only includes regions shown above

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2015.

Figure 14

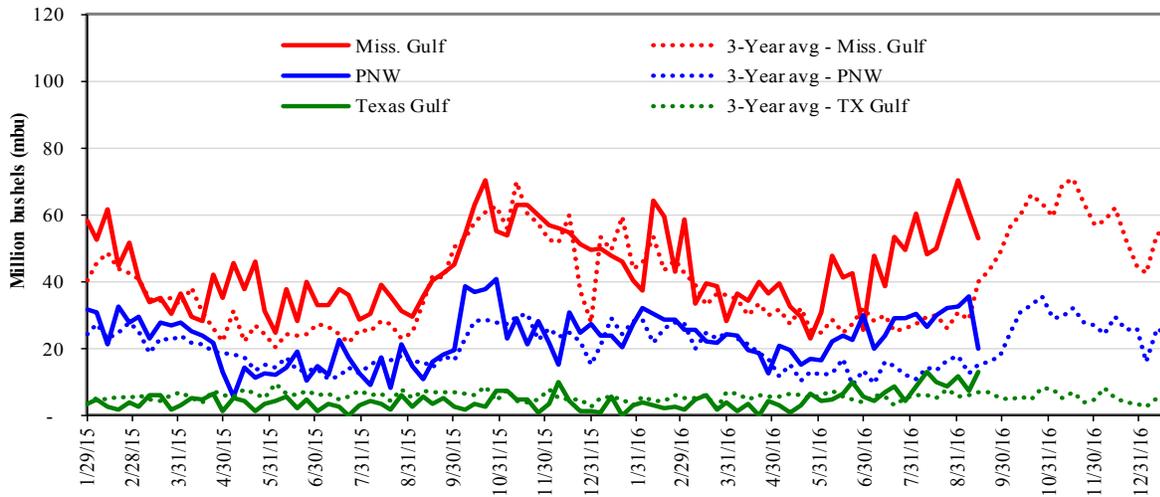
U.S. grain inspected for export (wheat, corn, and soybeans)



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 09/15/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	53.1	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	20.1	Last Year (same week):	down 12	up 83	down 2	down 44
Texas Gulf:	13.2	3-yr avg. (4-wk. mov. Avg):	up 31	up 283	up 51	up 27
			up 70	up 104	up 76	up 30

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

Ocean Transportation

Table 17

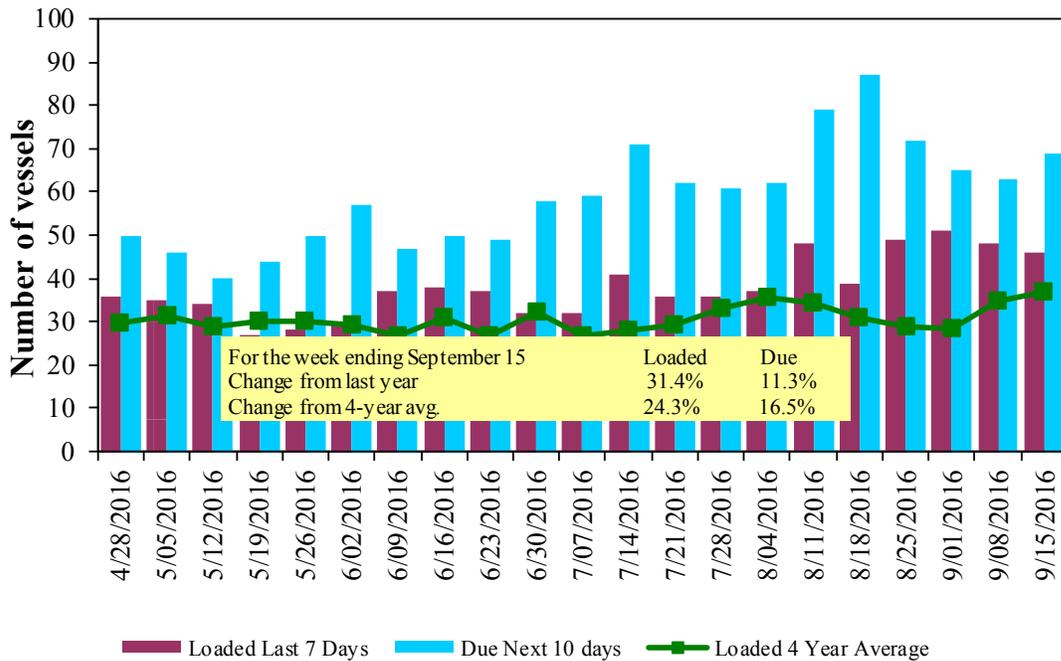
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
9/15/2016	39	46	69	8	n/a
9/8/2016	41	48	63	7	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

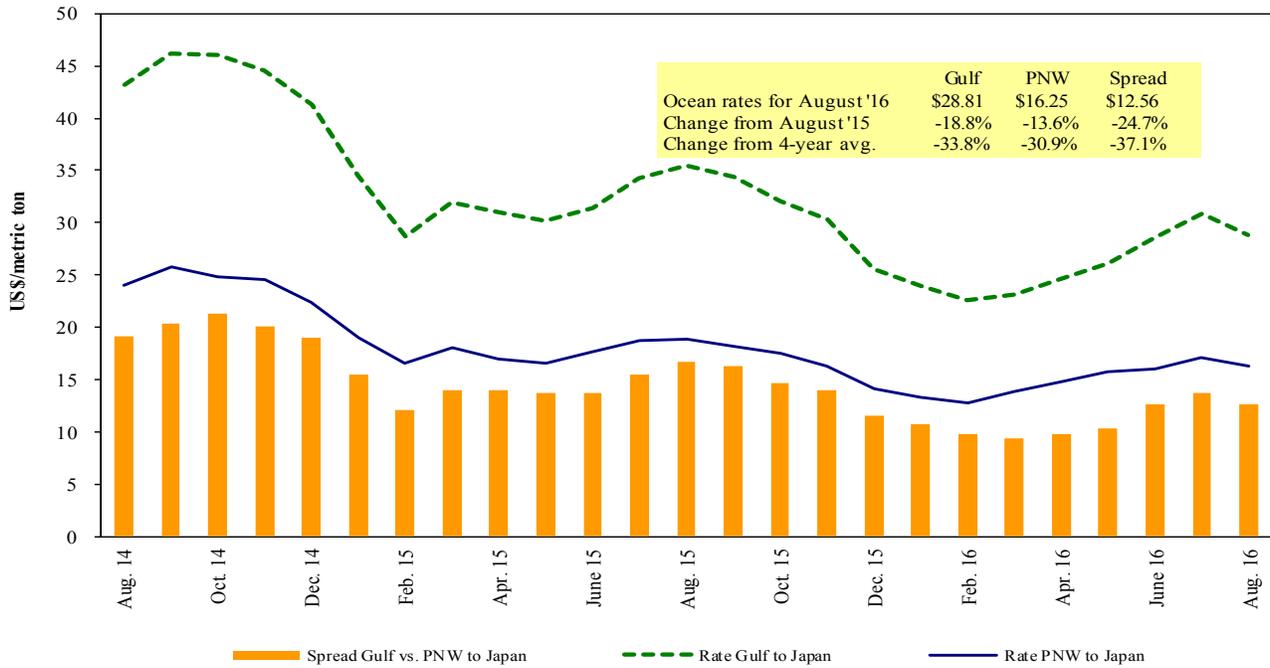
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

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 09/17/2016

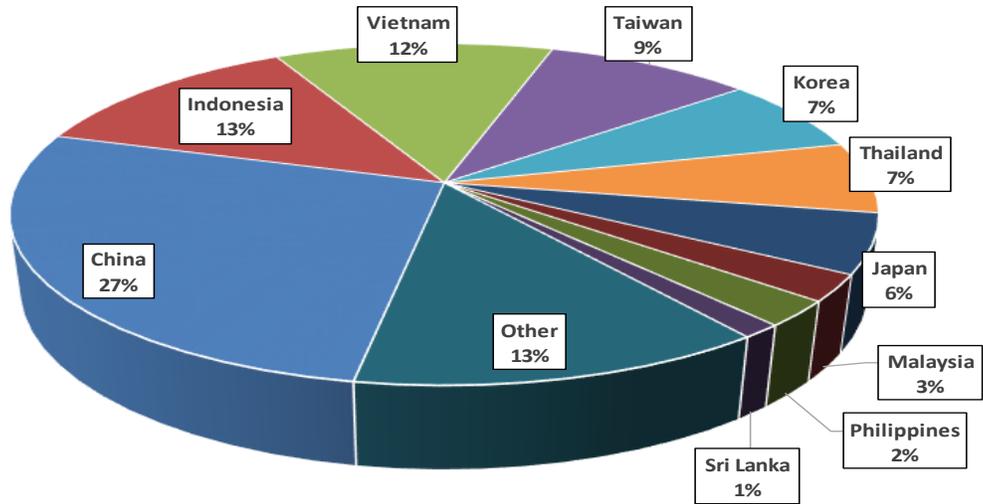
Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Sep 20/25	60,000	27.75
U.S. Gulf	China	Heavy Grain	Sep 1/10	60,000	27.00
U.S. Gulf	China	Heavy Grain	Aug 25/Sep 5	66,000	26.25
U.S. Gulf	China	Heavy Grain	Aug 24/30	60,000	26.40
U.S. Gulf	China	Heavy Grain	Aug 16/26	60,000	26.00
U.S. Gulf	China	Heavy Grain	Aug 15/25	60,000	26.75
U.S. Gulf	China	Heavy Grain	Aug 10/20	60,000	26.25
U.S. Gulf	South Africa	Sorghum ¹	Sep 15/25	20,000	63.50
U.S. Gulf	Djibouti	Wheat ¹	Aug 22/31	47,720	46.48
PNW	Japan	Heavy Grain	Aug 1/10	58,000	19.80
PNW	Japan	Heavy Grain	Jul 20/30	60,000	16.50
PNW	Taiwan	Wheat ¹	Sep 8/22	54,000	21.10
Brazil	China	Heavy Grain	Aug 18/25	60,000	18.60
Brazil	Japan	Heavy Grain	Sep 1/30	62,000	19.00
Brazil	Malaysia	Heavy Grain	Sep 1/30	65,000	17.00
River Plate	Algeria	Corn	Sep 24/28	40,000	19.50
Romania	France	Heavy Grain	Aug 5/9	55,000	8.50
Ukraine	Morrocco	Heavy Grain	Aug 29/Sep 3	30,000	16.00

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

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

In 2014, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2014 went to Asia, of which 11 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

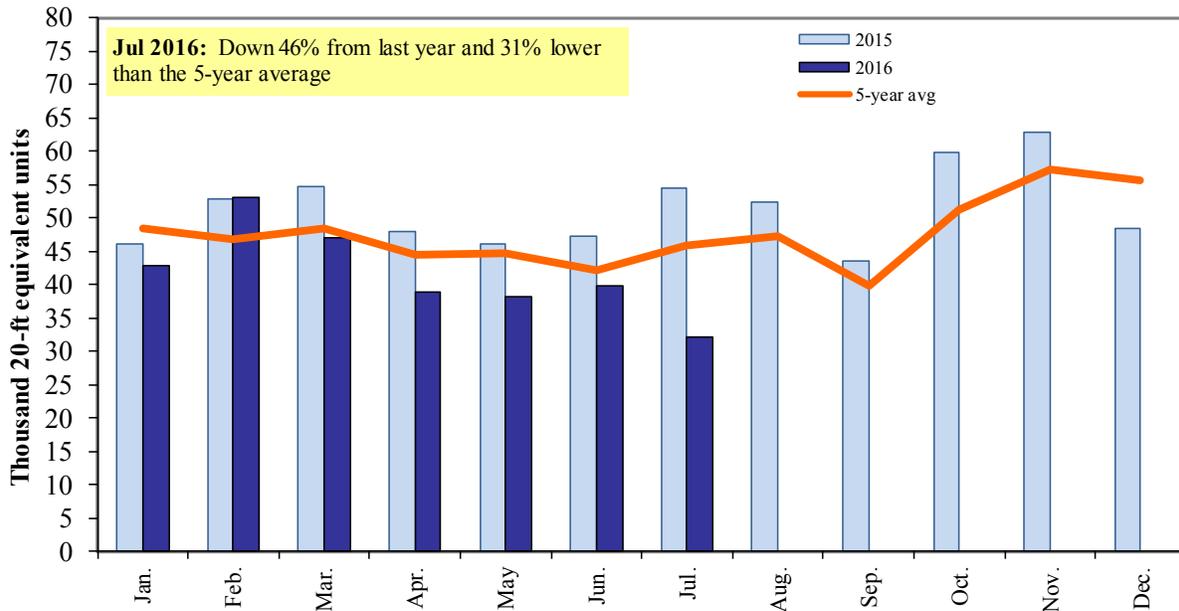
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-July 2016



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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