

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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December 14, 2017

WEEKLY HIGHLIGHTS

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Grain Barge Rates Decline Since October...

St. Louis barge rates for export grain peaked on October 3 at 800 percent of tariff (\$31.92 per ton), but dropped significantly to 338 percent of tariff (\$13.49 per ton) by the end of October. The average November barge rate for St. Louis was 240 percent of tariff (\$9.58 per ton). Presently, the average December barge rate for St. Louis is about 200 percent of tariff (\$7.98 per ton). Similar patterns were observed for other major barge originating locations, except for the Ohio River, where rates have seen occasional increases due to delays caused by lock and dam repairs.

...and Secondary Railcar Markets Drop Since August

Weekly average October and November shuttle rates on the secondary railcar market fell from late August through November due to adequate railcar supply relative to a lower-than-expected demand. Rail shipments of grain over the past four weeks have been only 89 percent of last year's level. Compared to the previous year, weekly average October shuttle rates per car were almost \$1,000 less on BNSF and \$700 less on UP between August and October. Weekly average November shuttle rates per car were almost \$600 less on BNSF and \$200 less on UP between August and November. Average December shuttle **secondary railcar** bids/offers per car were \$141 below tariff for the week ending December 7, \$286 lower than last year. According to the December USDA *World Agricultural Supply and Demand Estimates*, there has been reduced soybean exports during September, October, and November due to stronger-than-expected competition from Argentina and Brazil.

Grain Inspections Lowest Since September

For the week ending December 7, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.28 million metric tons (mmt), down 21 percent from the previous week, down 29 percent from the same time last year, and 29 percent below the 3-year average. The drop in inspections was caused primarily by the typical slowdown in demand from Asia and Latin America during this period. Grain inspections were the lowest since the middle of September, with wheat inspections decreasing 23 percent from the previous week, and soybeans dropping 31 percent for the same period. Inspections of corn rebounded from the past week, increasing 9 percent. Pacific Northwest (PNW) inspections decreased 14 percent from the past week, and Mississippi Gulf grain inspections decreased 29 percent for the same period. Outstanding (unshipped) export sales were down for wheat and soybeans, but up for corn.

Snapshots by Sector

Export Sales

For the week ending November 30, **unshipped balances** of wheat, corn, and soybeans totaled 33.6 mmt, down 20 percent from the same time last year. Net weekly **wheat export sales** were .322 mmt, up 74 percent from the previous week. Net **corn export sales** were .876 mmt, up 46 percent from the previous week, and net **soybean export sales** were 2.0 mmt for the same period, up significantly from the previous week.

Rail

U.S. Class I railroads originated 25,712 **grain carloads** for the week ending December 2, up 37 percent from the previous week, up 3 percent from last year, and up 13 percent from the 3-year average.

There were no shuttle bids/offers last week and no non-shuttle bids/offers this week.

Barge

For the week ending December 9, **barge grain movements** totaled 811,802 tons, 14 percent higher than the previous week, and down 23 percent from the same period last year.

For the week ending December 9, 524 grain barges **moved down river**, up 15 percent from last week. 676 grain barges were **unloaded in New Orleans**, 22 percent lower than the previous week.

Ocean

For the week ending December 7, 37 **ocean-going grain vessels** were loaded in the Gulf, 18 percent less than the same period last year. Sixty-one vessels are expected to be loaded within the next 10 days, 27 percent less than the same period last year.

For the week ending December 7, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.25 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was \$24.75 per metric ton, unchanged from the previous week.

Fuel

During the week ending December 11, average **diesel fuel prices** decreased 1 cent from the previous week at \$2.91 per gallon, 42 cents above the same week last year.

Feature Article/Calendar

Study of Grain Basis Behavior during Transportation Disruptions

Basis, which is the difference between the local cash (spot) price and the futures price for a commodity, is an important and complex signaling mechanism in grain markets. Some have called it “the voice of the market,” since basis affects when and where many grain producers and shippers buy and sell grain.¹ Basis is mathematically expressed as: $\text{Basis} = \text{Cash Price} - \text{Futures Price}$.

Local cash prices reflect local supply and demand forces, while futures markets reflect global supply and demand forces. When local supplies are tight relative to demand, cash prices will rise, resulting in a more positive (or less negative) basis at that location. This is also known as the basis narrowing or strengthening. Crop merchandizers strengthen basis to increase the flow of grain. Conversely, basis widens or weakens when it becomes less positive (or more negative). Merchandizers weaken basis to slow the flow of grain. As the cash price falls relative to the futures price, the incentive to store grain increases.

Numerous factors influence basis, such as local storage capacity and crop quality, but transportation is usually one of the largest cost components, either directly through shipping costs or indirectly, for example, through transportation availability. Thus, disruptions to the transportation system can have serious impacts on basis. Researchers at Iowa State University (ISU) and North Dakota State University (NDSU) explored the interactions of transportation costs, transportation disruptions, and other variables on basis. This article presents highlights of an [AMS summary](#) of [their report](#), including an overview of the study’s methods and major results.²

Study Methods

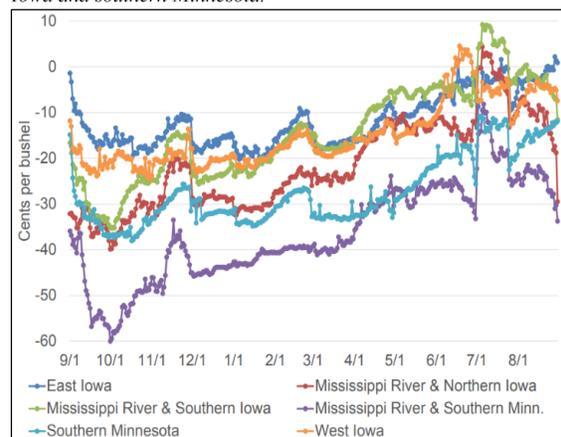
In order to better understand basis behavior and patterns, the researchers conducted both exploratory and regression analyses. In the first part, they examined basis patterns over time and across space. This involved, for instance, using cash price data from USDA’s Agricultural Marketing Service to generate a series of graphs plotting corn basis over time from the start to the end of the marketing year for several major corn markets (e.g., eastern Iowa, southern Minnesota, various locations on the Mississippi River, etc.). In addition, the researchers developed “heat maps” depicting the response in basis to changes in events, such as the disruptions caused by Hurricane Katrina in 2005 or the annual closure of the Upper Mississippi River to barge traffic.

The study also developed regression models to explore the relationships between various grain market and transportation variables on basis in the Corn Belt and major wheat markets in the Upper Plains. The researchers included factors representing shifts in futures contracts throughout the marketing year, local demand (e.g., ethanol and livestock), potential disruptions in the transportation system (e.g., hurricanes and closure of the Upper Mississippi), and transportation costs (e.g., diesel fuel prices, ocean freight rates, and rates in the secondary rail auction market), among others.

Study Results

The researchers visually demonstrated that basis varies over the course of the marketing year and by location. Figure 1 plots the average corn basis for multiple locations from September through August, the marketing year for corn. Two observations are notable: (1) basis tends to improve (or strengthen) in the months after harvest, since the filling of demand needs (from

Figure 1: Average corn basis for USDA-AMS reported prices for Iowa and southern Minnesota.



Source: Hart and Olson, 2017.

¹ Kluis, Alan. “Understanding Basis Signals in the Grain Markets.” *Corn and Soybean Digest*. March 31, 2000.

² Hart, Chad and Frayne Olson. *Analysis of Grain Basis Behavior during Transportation Disruptions and Development of Weekly Grain Basis Indicators for the USDA Grain Transportation Report*. Staff Report 17-SR 111. Center for Agricultural and Rural Development, Iowa State University. May 2017. This staff report received funding from USDA’s Agricultural Marketing Service through cooperative agreement number 14-TMXXX-IA-0028.

livestock, ethanol, exports, and other uses) decreases grain supplies, and (2) basis levels in southern and eastern Iowa tend to be higher than for southern Minnesota and northern Iowa due to their proximity to export terminals in the Gulf. Areas closer to demand centers generally face lower transportation costs and thus tend to have higher local demand and a stronger basis.

Figure 2 offers another visual of this typical pattern, where the orange/red coloring indicates a stronger (or narrower) basis, and the green/blue coloring indicates a weaker (or wider) basis. As the authors explained, “basis tends to be weak [green/blue] in areas where local supply is large relative to demand and strong [orange/red] where demand is large relative to local supply. One can think of basis as the price signal to move the crop towards the areas where crop demands are relatively stronger.” As a result, basis is normally stronger along the river and near the Gulf of Mexico. However, Hurricane Katrina significantly disrupted flows out of the Gulf, and consequently halted barge traffic, delaying shipments. Grain shippers faced increased costs implementing alternative transportation options. As a result, basis levels weakened across portions of Illinois, Missouri, and other areas to offset those financial impacts and slow down the flow of grain (Figure 3).

Most of the regression results aligned with expectations. For instance, demand factors (such as ethanol and livestock) had mostly positive and significant relationships with basis in Iowa, meaning that increases in local demand correspond to a stronger basis. Similarly, basis tended to increase with more demand (reflected by export levels) in the major wheat markets.

In terms of transportation disruptions, the hurricane impact was not significant across Iowa, but the winter closure impact was for most Iowa locations studied. Comparatively, the hurricane and winter disruption impacts had significant effects on basis for the Illinois locations, with the impact from hurricanes almost twice the size of winter disruptions. The authors explained, “Illinois is closer to the Gulf and further away from the winter river stoppages. The hurricane impact is also larger at the barge loading elevators along the Illinois River than it is for the country elevators,” reflecting the barge loading elevators’ greater reliance on river transportation to reach crop users.

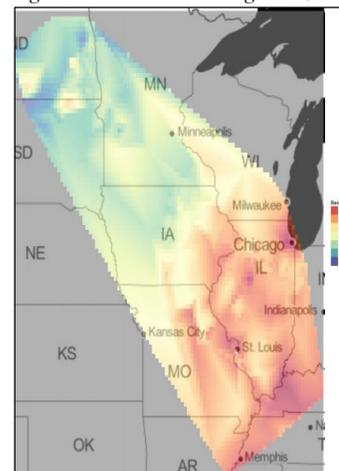
Transportation costs—diesel rates, ocean freight rates, rail tariff rates, and rates in the secondary rail auction market—were almost all significant across the sampled locations, Iowa, Illinois, North Dakota, and Montana. The study found that increases in transportation costs translate into weaker basis levels. In other words, “the results show that increases in the tariff rates, fuel surcharges, and the costs of transportation in the secondary markets have a direct, inverse impact on basis.” In one example, the researchers found that a \$1 change in the price of diesel was associated with a \$0.17 decrease in basis in east Iowa. The authors concluded that: “transportation costs are a major component in basis setting.” Further, they emphasized, “there are a number of factors that influence basis at any given time, and the influence of these factors on basis levels depends on the specific combination of crop, location, and time period.”

Overall, the study found that increased local production and higher transportation costs are associated with wider basis levels. In contrast, higher local usage, via ethanol or livestock, is associated with narrower basis levels. In addition, there are some distinct seasonal patterns to basis, which vary by region.

The study found mixed impacts from natural disasters, again depending on the region of the country. The variables chosen to model basis held the most explanatory power for regions closer to the major shipping channel, the Mississippi River system. This suggests that further research using additional variables is needed to explain changes in basis for regions farther away from the Mississippi River.

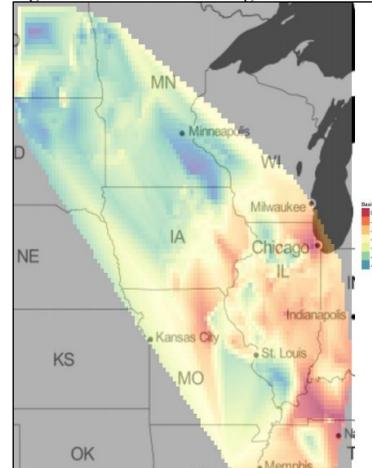
Peter.A.Caffarelli@ams.usda.gov, Adam.Sparger@ams.usda.gov, Jesse.Gastelle@ams.usda.gov, Matt.Chang@ams.usda.gov

Figure 2: Corn basis on August 23, 2005.



Source: Hart and Olson, 2017.

Figure 3: Corn basis on August 30, 2005.



Source: Hart and Olson, 2017.

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail	Barge	Ocean	
		Unit Train	Shuttle	Gulf	Pacific
12/13/17	195	264	207	198	176
12/06/17	196	272	213	198	176

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)

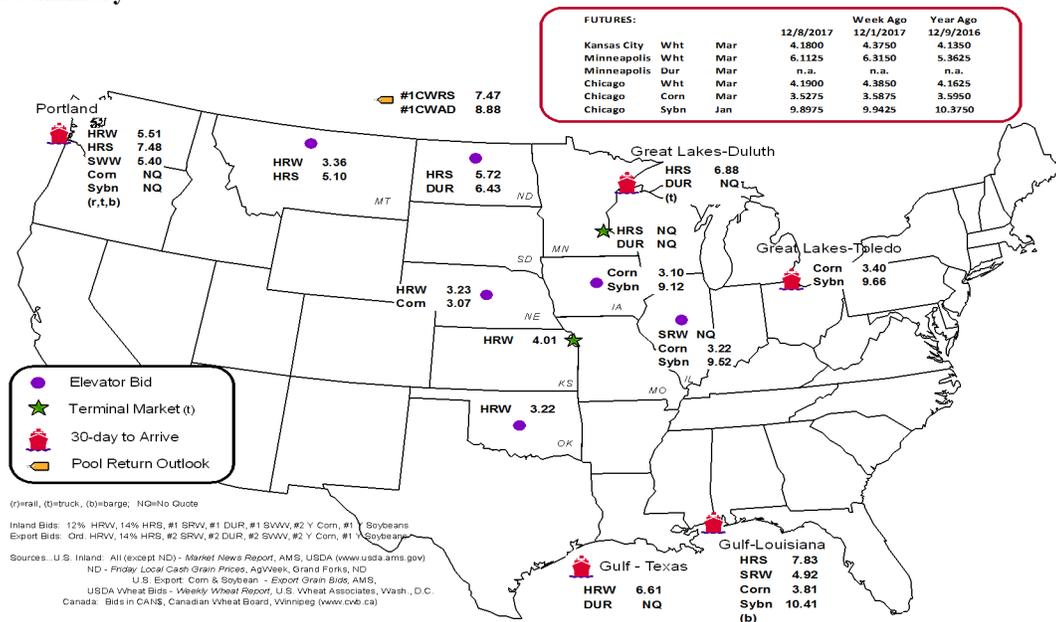
Commodity	Origin--Destination	12/8/2017	12/1/2017
Corn	IL--Gulf	-0.59	-0.63
Corn	NE--Gulf	-0.74	-0.82
Soybean	IA--Gulf	-1.29	-1.09
HRW	KS--Gulf	-2.60	-2.70
HRS	ND--Portland	-1.76	-1.66

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
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico ³
12/06/2017 ^p	453	790	7,460	291	8,994	12/2/2017	1,810
11/29/2017 ^f	127	893	5,038	187	6,245	11/25/2017	2,595
2017 YTD ^f	27,694	72,961	269,845	20,911	391,411	2017 YTD	113,519
2016 YTD ^f	34,631	81,301	281,923	25,968	423,823	2016 YTD	101,954
2017 YTD as % of 2016 YTD	80	90	96	81	92	% change YTD	111
Last 4 weeks as % of 2016 ²	41	47	77	35	64	Last 4wks % 2016	96
Last 4 weeks as % of 4-year avg ²	35	64	88	39	73	Last 4wks % 4 yr	111
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.

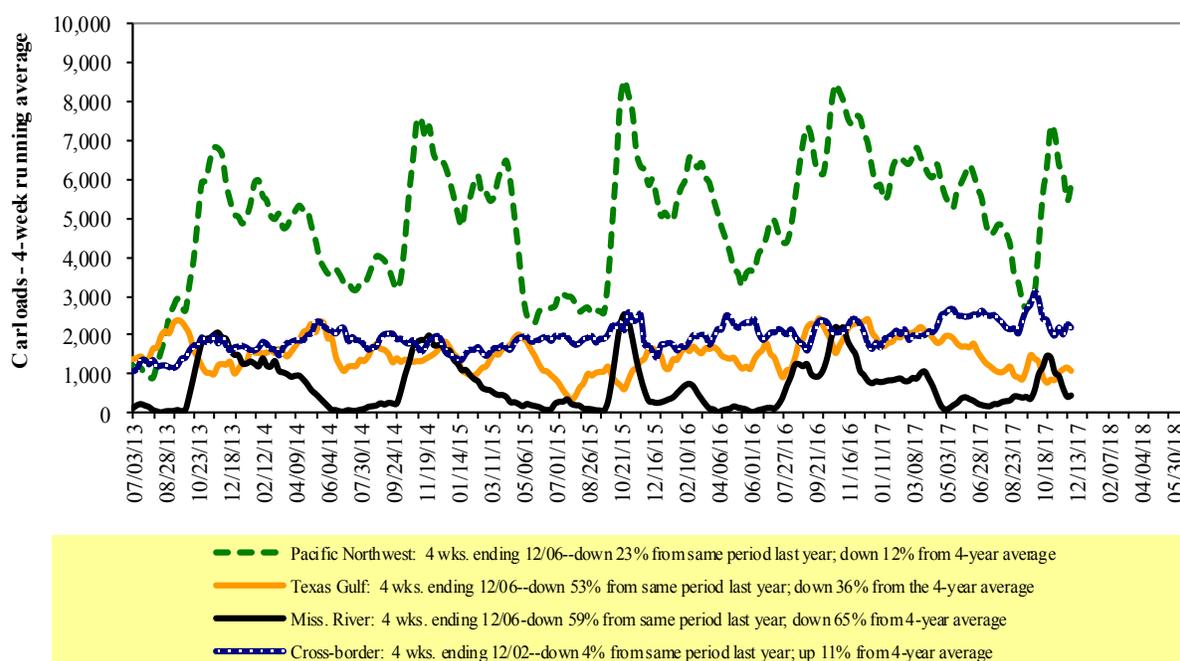
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

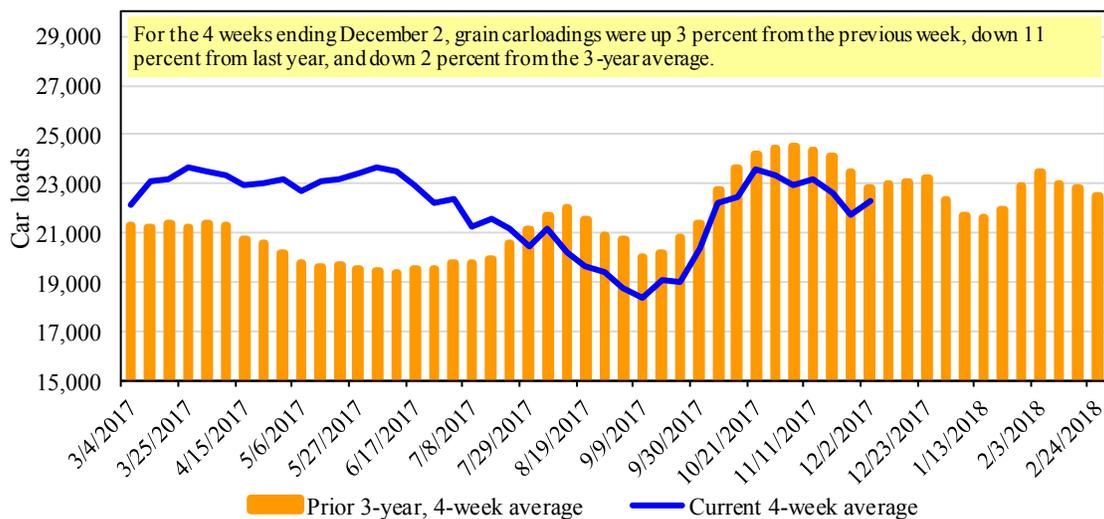
For the week ending: 12/2/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,104	3,122	13,660	1,139	5,687	25,712	3,227	5,141
This week last year	1,726	3,763	13,095	863	5,566	25,013	4,682	5,626
2017 YTD	82,446	132,985	533,370	46,768	269,933	1,065,502	184,627	225,950
2016 YTD	87,322	140,022	545,397	41,666	277,600	1,092,007	178,524	217,137
2017 YTD as % of 2016 YTD	94	95	98	112	97	98	103	104
Last 4 weeks as % of 2016*	103	85	90	114	82	89	88	95
Last 4 weeks as % of 3-yr avg**	96	91	103	111	90	98	86	100
Total 2016	95,179	151,006	590,779	45,246	300,836	1,183,046	193,725	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: 12/7/2017		Delivery period							
		Dec-17	Dec-16	Jan-18	Jan-17	Feb-18	Feb-17	Mar-18	Mar-17
BNSF ³	COT grain units	0	0	no bids	0	no bids	no bids	no bids	no bids
	COT grain single-car ⁵	0	11	0	4	no bids	no bids	no bids	no bids
UP ⁴	GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	41	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.

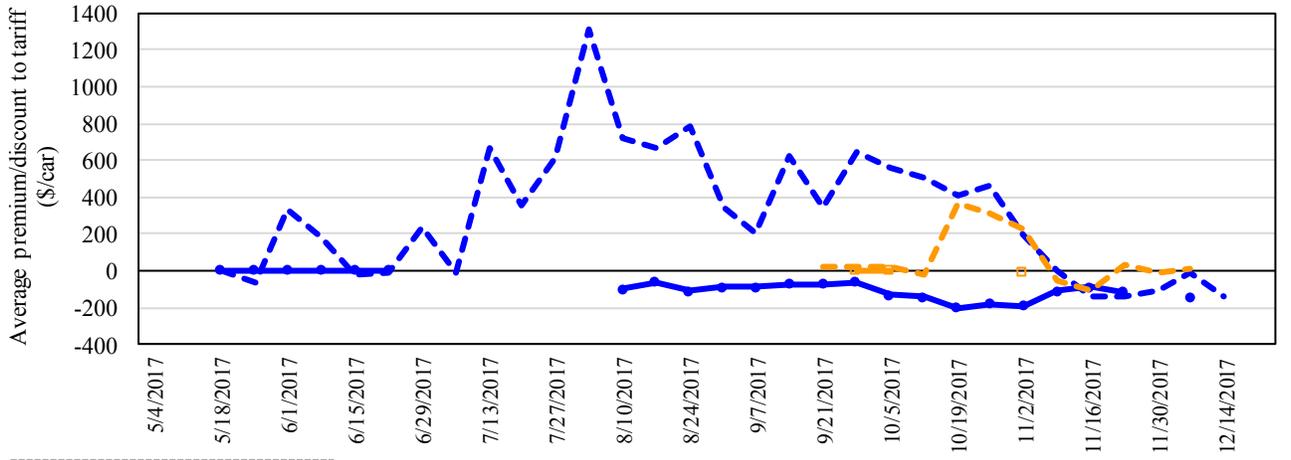
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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 December 2017, Secondary Market



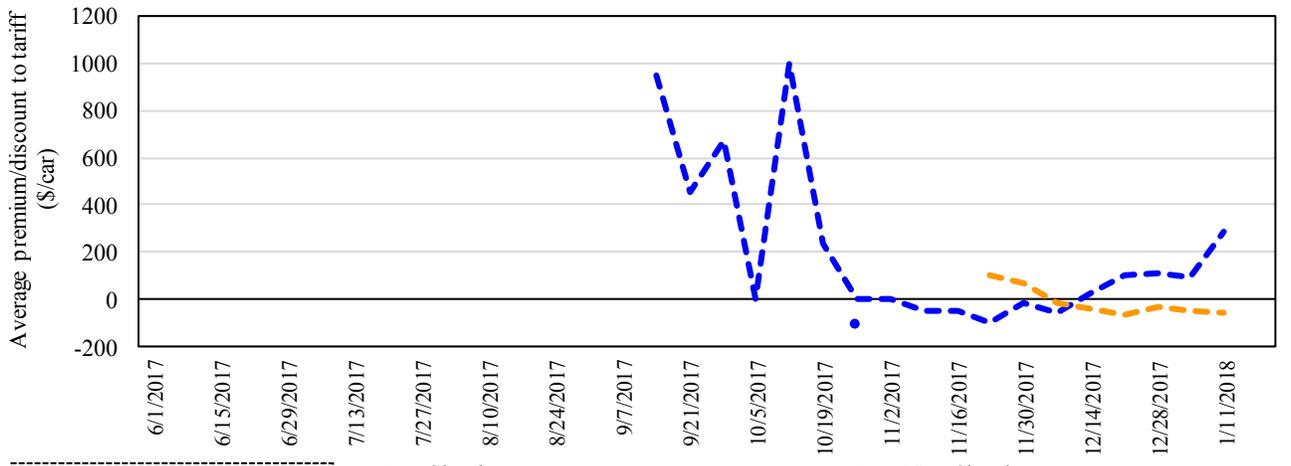
12/7/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	\$6	-\$288

—●— 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.
 There were no Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are \$141 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 January 2018, Secondary Market



12/7/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

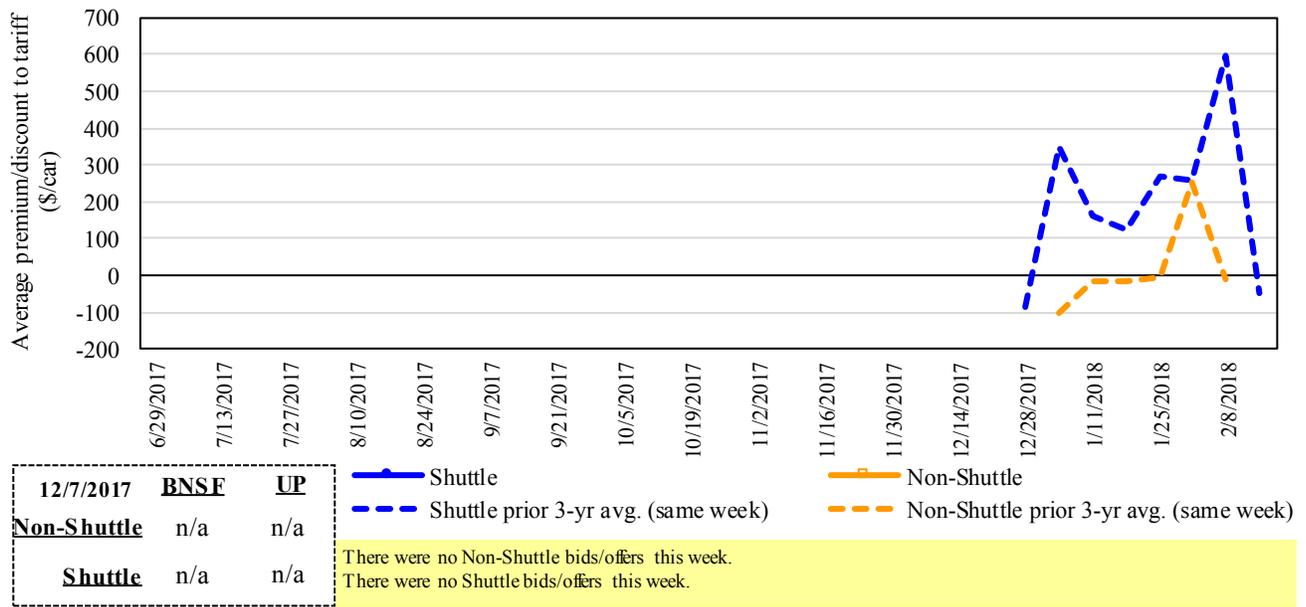
—●— Shuttle
- - - Shuttle prior 3-yr avg. (same week)
—□— Non-Shuttle
- - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week.
 There were no Shuttle bids/offers this week.

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 2018, Secondary Market



12/7/2017	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

— 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.
 There were no Shuttle bids/offers this week.

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: 12/7/2017		Delivery period					
		Dec-17	Jan-18	Feb-18	Mar-18	Apr-18	May-18
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	6	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	(285)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(288)	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	(288)	n/a	n/a	n/a	n/a	n/a

¹ Average 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

December, 2017	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴	
					metric ton	bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,883	\$71	\$39.26	\$1.07	4	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0	
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1	
	Wichita, KS	New Orleans, LA	\$4,540	\$125	\$46.32	\$1.26	4	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$137	\$49.18	\$1.34	4	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$190	\$51.75	\$1.41	5	
	Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$141	\$40.44	\$1.03	8
		Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
		Des Moines, IA	Davenport, IA	\$2,258	\$30	\$22.72	\$0.58	1
		Indianapolis, IN	Atlanta, GA	\$5,446	\$0	\$54.08	\$1.37	5
		Indianapolis, IN	Knoxville, TN	\$4,540	\$0	\$45.08	\$1.15	5
		Des Moines, IA	Little Rock, AR	\$3,609	\$88	\$36.71	\$0.93	3
	Soybeans	Des Moines, IA	Los Angeles, CA	\$5,327	\$255	\$55.43	\$1.41	4
Minneapolis, MN		New Orleans, LA	\$3,631	\$127	\$37.32	\$1.02	2	
Toledo, OH		Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5	
Indianapolis, IN		Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5	
Indianapolis, IN		Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5	
Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$141	\$48.52	\$1.32	7		
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0	
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	8	
	Chicago, IL	Albany, NY	\$5,663	\$0	\$56.24	\$1.53	3	
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	0	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0	
	Northwest KS	Portland, OR	\$5,812	\$224	\$59.94	\$1.63	5	
	Corn	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0
Sioux Falls, SD		Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0	
Champaign-Urbana, IL		New Orleans, LA	\$3,731	\$141	\$38.45	\$0.98	9	
Lincoln, NE		Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0	
Des Moines, IA		Amarillo, TX	\$3,970	\$110	\$40.52	\$1.03	3	
Minneapolis, MN		Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
Council Bluffs, IA		Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2	
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0	
	Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0	
	Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0	
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$162	\$49.03	\$1.33	7	
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3	
Grand Island, NE	Portland, OR	\$5,710	\$229	\$58.98	\$1.61	6		

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally 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 and soybeans 60 lbs./bu.

³Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change ⁴ Y/Y	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Date: December, 2017							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$98	\$68.75	\$1.87	1
	KS	Guadalajara, JA	\$7,309	\$285	\$77.59	\$2.11	5
	TX	Salinas Victoria, NL	\$4,292	\$60	\$44.46	\$1.21	3
Corn	IA	Guadalajara, JA	\$8,313	\$248	\$87.47	\$2.22	3
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$205	\$83.97	\$2.13	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$200	\$77.44	\$1.97	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$231	\$85.47	\$2.32	-5
	NE	Guadalajara, JA	\$8,692	\$250	\$91.37	\$2.48	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$180	\$78.36	\$2.13	1
Sorghum	NE	Celaya, GJ	\$7,345	\$226	\$77.36	\$1.96	4
	KS	Queretaro, QA	\$7,819	\$122	\$81.14	\$2.06	3
	NE	Salinas Victoria, NL	\$6,452	\$98	\$66.92	\$1.70	4
	NE	Torreon, CU	\$6,790	\$172	\$71.13	\$1.80	4

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.

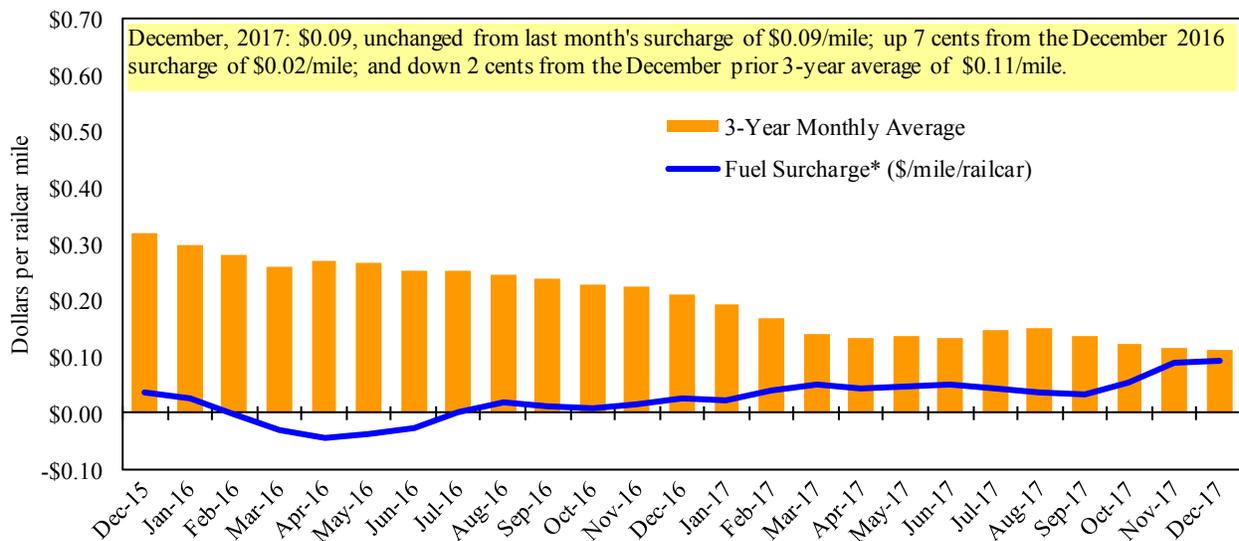
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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
Rate ¹	12/12/2017	-	-	278	208	300	300	175
	12/5/2017	-	-	285	195	268	268	173
\$/ton	12/12/2017	-	-	12.90	8.30	14.07	12.12	5.50
	12/5/2017	-	-	13.22	7.78	12.57	10.83	5.43
Current week % change from the same week:								
	Last year	-	-	7	11	35	35	3
	3-year avg. ²	-	-	-21	-17	4	4	-22
Rate ¹	January	-	-	300	218	245	245	175
	March	-	-	278	208	218	218	175

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

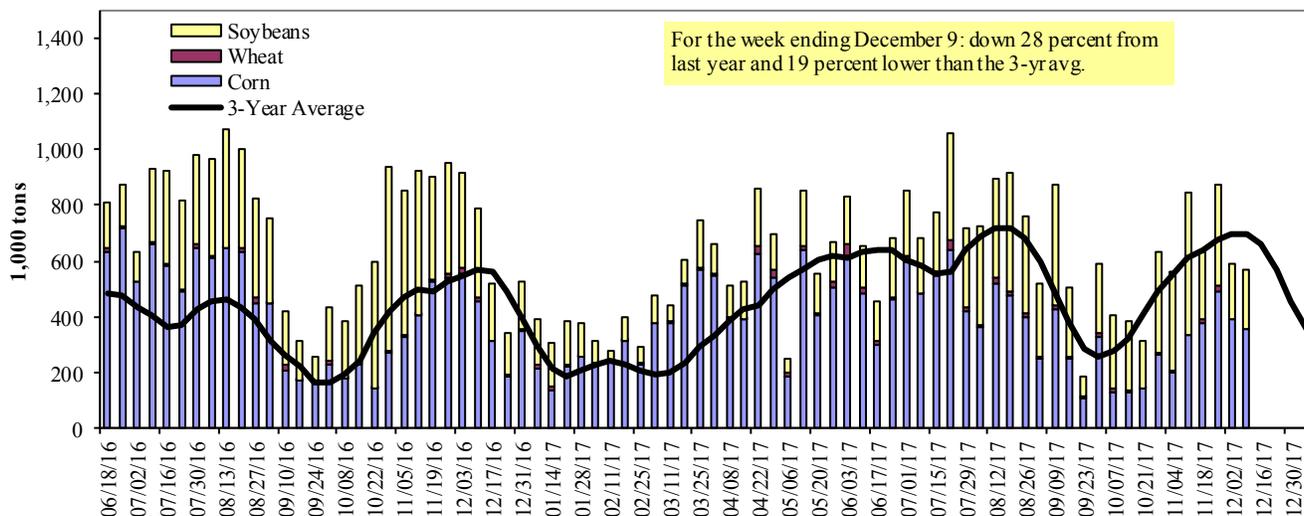
Calculating barge rate per ton:

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

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 12/9/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	120	0	79	0	198
Winfield, MO (L25)	150	0	170	8	328
Alton, IL (L26)	391	0	220	8	619
Granite City, IL (L27)	357	0	209	19	585
Illinois River (L8)	205	0	38	0	243
Ohio River (L52)	25	4	126	2	156
Arkansas River (L1)	0	6	66	0	71
Weekly total - 2017	381	9	400	21	812
Weekly total - 2016	513	29	514	2	1,057
2017 YTD ¹	21,214	2,123	15,200	344	38,880
2016 YTD	23,137	1,947	15,598	318	41,000
2017 as % of 2016 YTD	92	109	97	108	95
Last 4 weeks as % of 2016 ²	78	79	79	540	80
Total 2016	24,136	2,030	16,668	344	43,178

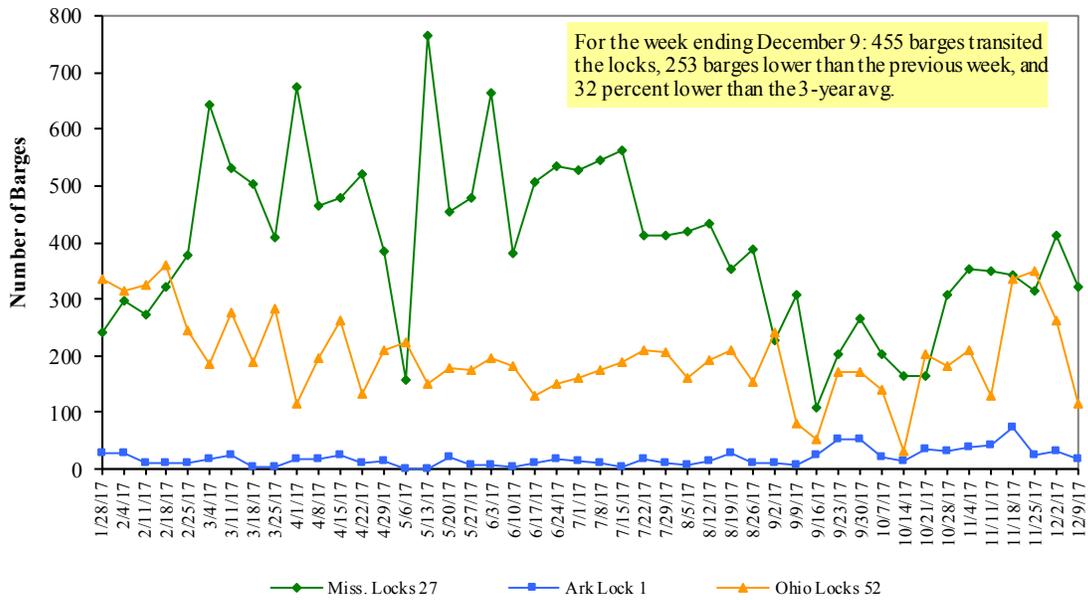
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

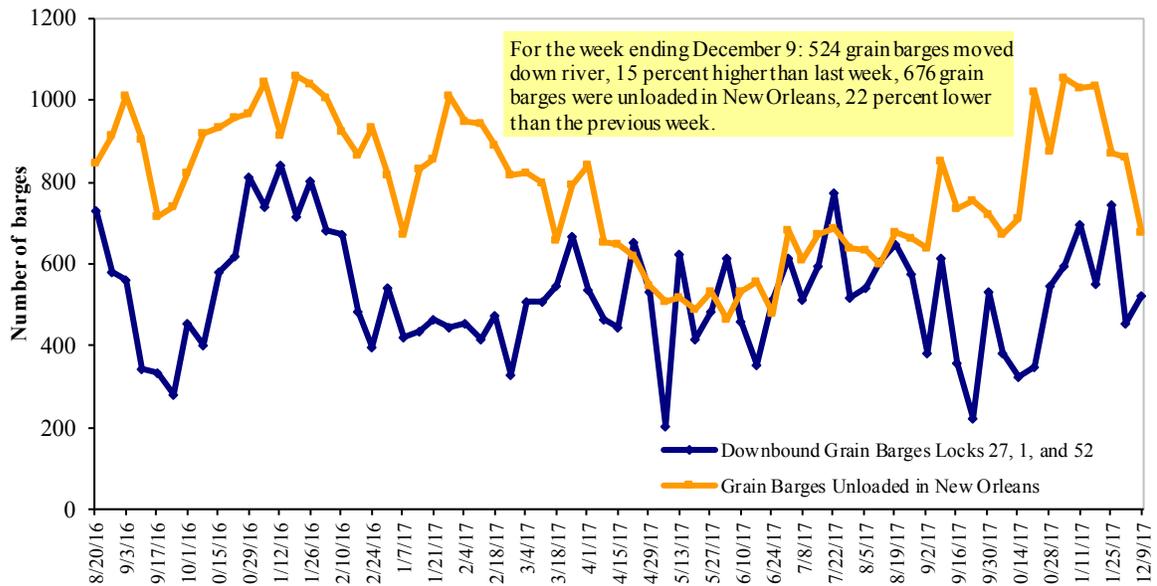
Source: U.S. Army Corps of Engineers

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 Prices, Week Ending 12/11/2017 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.901	-0.003	0.381
	New England	2.900	0.003	0.353
	Central Atlantic	3.060	-0.002	0.427
	Lower Atlantic	2.788	-0.006	0.359
II	Midwest ²	2.863	-0.014	0.417
III	Gulf Coast ³	2.705	-0.008	0.334
IV	Rocky Mountain	2.991	-0.028	0.544
V	West Coast	3.344	-0.029	0.572
	West Coast less California	3.072	-0.034	0.382
	California	3.560	-0.025	0.723
Total	U.S.	2.910	-0.012	0.417

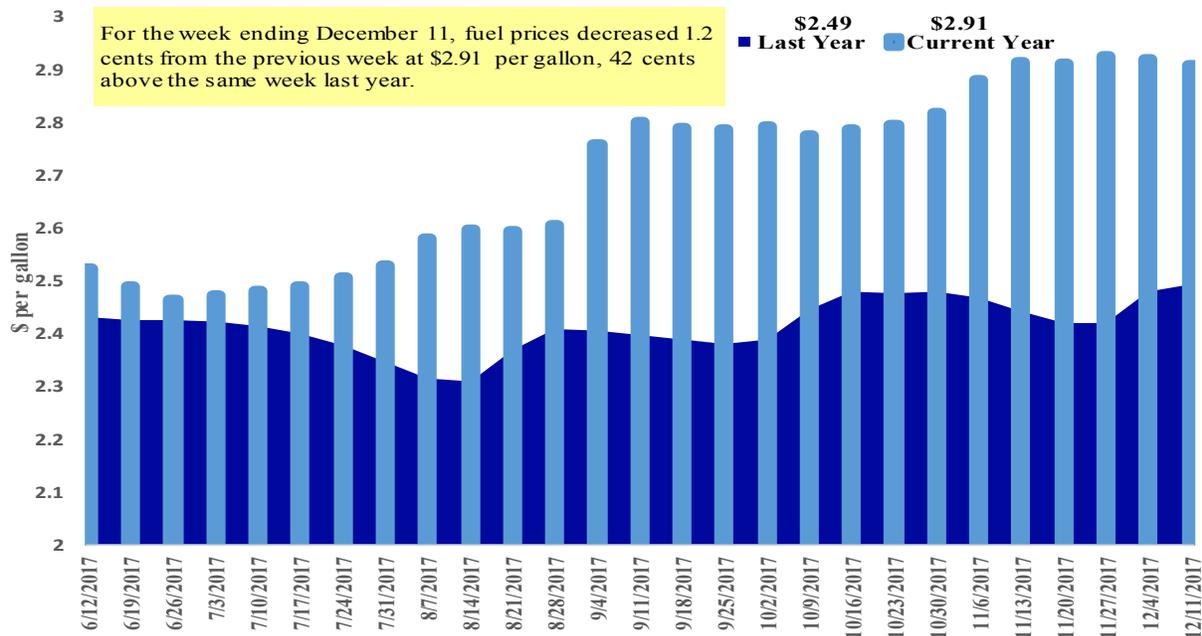
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
11/30/2017	1,989	545	1,579	1,280	58	5,450	14,813	13,302	33,564
This week year ago	2,084	559	2,304	1,186	188	6,320	18,484	17,160	41,964
Cumulative exports-marketing year²									
2017/18 YTD	4,925	1,099	3,145	2,665	202	12,036	8,087	23,040	43,163
2016/17 YTD	5,763	1,095	3,872	2,142	177	13,049	13,094	25,930	52,073
YTD 2017/18 as % of 2016/17	85	100	81	124	114	92	62	89	83
Last 4 wks as % of same period 2016/17	96	94	73	111	31	88	79	83	82
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,486

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for wheat, 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 11/30/2017			% change current MY from last MY	Exports ³ 3-year avg 2014-2016 - 1,000 mt -
	2017/18 Current MY	2016/17 Last MY		
Mexico	8,924	8,750	2	12,297
Japan	3,769	4,175	(10)	11,450
Korea	950	2,366	(60)	4,494
Colombia	1,548	1,908	(19)	4,179
Peru	1,402	1,459	(4)	2,693
Top 5 Importers	16,594	18,658	(11)	35,113
Total US corn export sales	22,899	31,578	(27)	49,308
% of Projected	47%	54%		
Change from prior week ²	876	1,495		
Top 5 importers' share of U.S. corn export sales	72%	59%		71%
USDA forecast, December 2017	48,982	58,346	(16)	
Corn Use for Ethanol USDA forecast, December 2017	140,335	138,151	2	

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 (net sales) 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 11/30/2017	Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	20,657	27,248	(24)	31,881
Mexico	1,854	1,855	(0)	3,452
Indonesia	815	764	7	1,987
Japan	969	1,113	(13)	2,067
Netherlands	656	449	0	2,098
Top 5 importers	24,951	31,429	(21)	41,486
Total US soybean export sales	36,342	43,090	(16)	52,919
% of Projected	59%	73%		
Change from prior week ²	1,947	1,392		
Top 5 importers' share of U.S. soybean export sales	69%	73%		78%
USDA forecast, December 2017	61,308	59,237	103	

(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 (net sales) 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 11/30/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,976	1,809	9	2,620
Mexico	2,122	1,867	14	2,743
Philippines	2,015	1,946	4	2,395
Brazil	111	1,081	(90)	862
Nigeria	812	855	(5)	1,254
Korea	1,219	1,010	21	1,104
China	782	733	7	1,623
Taiwan	789	734	7	768
Indonesia	807	654	23	726
Colombia	488	582	(16)	635
Top 10 importers	11,119	11,271	(1)	14,729
Total US wheat export sales	17,486	19,369	(10)	22,804
% of Projected	66%	67%		
Change from prior week ²	322	503		
Top 10 importers' share of U.S. wheat export sales	64%	58%		65%
USDA forecast, December 2017	26,567	28,747	(8)	

(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 (net sales) from prior week could include revisions from the previous
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 12/07/17	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
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	222	267	83	13,857	11,594	120	91	115	12,325
Corn	58	0	n/a	10,317	11,533	89	7	16	12,009
Soybeans	491	635	77	12,286	13,098	94	100	103	14,447
Total	771	901	86	36,460	36,224	101	78	96	38,782
Mississippi Gulf									
Wheat	27	65	42	4,064	3,338	122	80	77	3,480
Corn	413	443	93	27,757	29,939	93	84	101	31,420
Soybeans	622	991	63	30,107	32,120	94	78	76	35,278
Total	1,063	1,498	71	61,927	65,397	95	80	82	70,178
Texas Gulf									
Wheat	44	18	241	6,058	5,600	108	73	96	6,019
Corn	22	11	204	733	1,590	46	26	50	1,669
Soybeans	0	0	n/a	219	1,027	21	0	0	1,105
Total	66	29	228	7,010	8,217	85	42	55	8,792
Interior									
Wheat	40	37	108	1,641	1,458	113	90	114	1,543
Corn	153	136	113	8,315	6,854	121	122	168	7,197
Soybeans	132	117	113	5,187	4,327	120	105	106	4,577
Total	325	290	112	15,143	12,639	120	113	134	13,317
Great Lakes									
Wheat	0	45	0	641	1,094	59	30	47	1,186
Corn	0	0	n/a	189	584	32	18	51	584
Soybeans	22	32	68	847	868	98	55	57	910
Total	22	77	28	1,677	2,546	66	41	54	2,681
Atlantic									
Wheat	0	0	n/a	46	289	16	80	3	315
Corn	0	5	0	32	293	11	937	668	294
Soybeans	27	89	31	1,734	1,959	89	85	80	2,269
Total	27	94	29	1,813	2,541	71	86	79	2,878
U.S. total from ports									
Wheat	334	432	77	26,307	23,373	113	80	99	24,867
Corn	647	594	109	47,343	50,794	93	69	99	53,173
Soybeans	1,294	1,864	69	50,379	53,399	94	83	83	58,587
Total	2,275	2,890	79	124,029	127,565	97	79	88	136,627

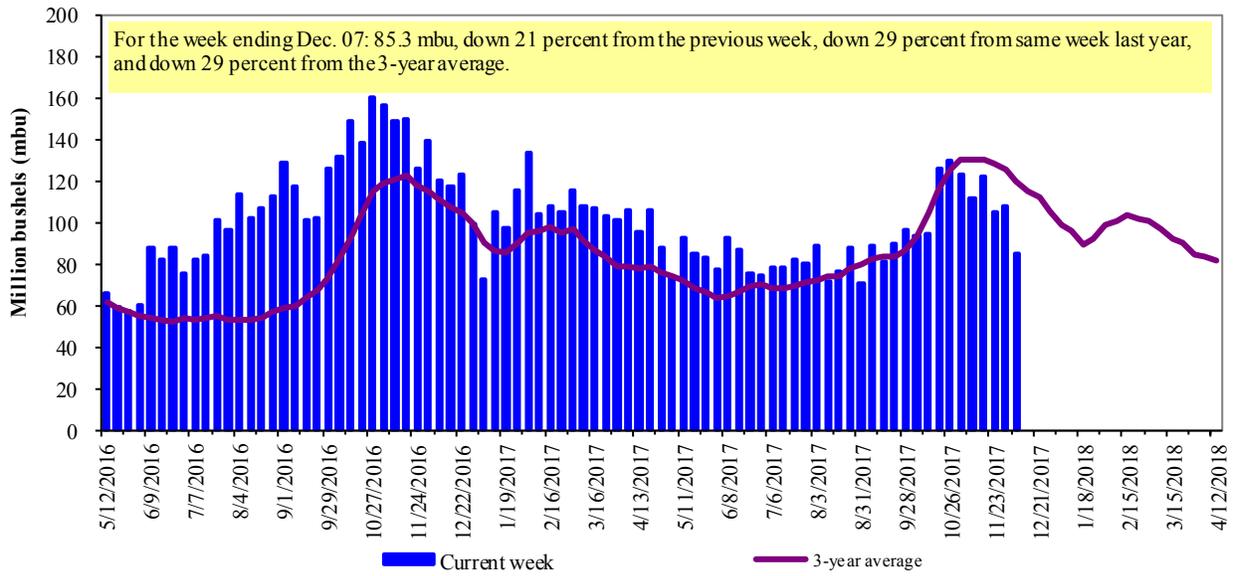
¹ Data includes revisions from prior weeks; some regional and U.S. totals may not add exactly due to rounding.

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)

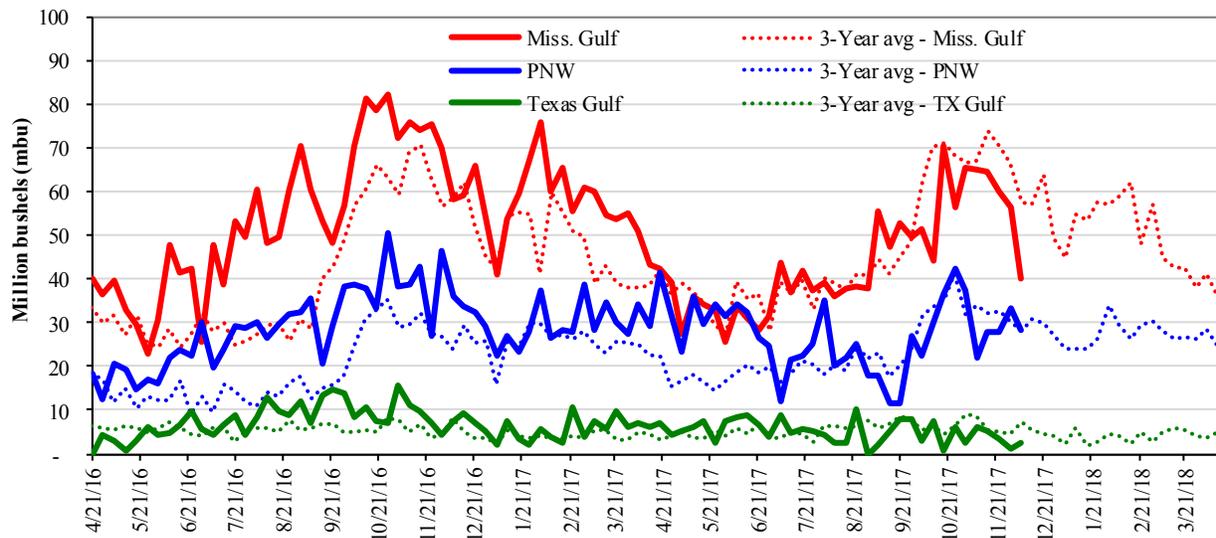


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 12/07/17 inspections (mbu):		Percent change from:				
Mississippi Gulf:	40.1	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	28.5	Last Year (same week):	down 29	up 127	down 26	down 14
Texas Gulf:	2.5	3-yr avg. (4-wk. mov. Avg):	down 31	down 68	down 35	down 20
			down 40	down 55	down 41	down 7

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

Ocean Transportation

Table 17

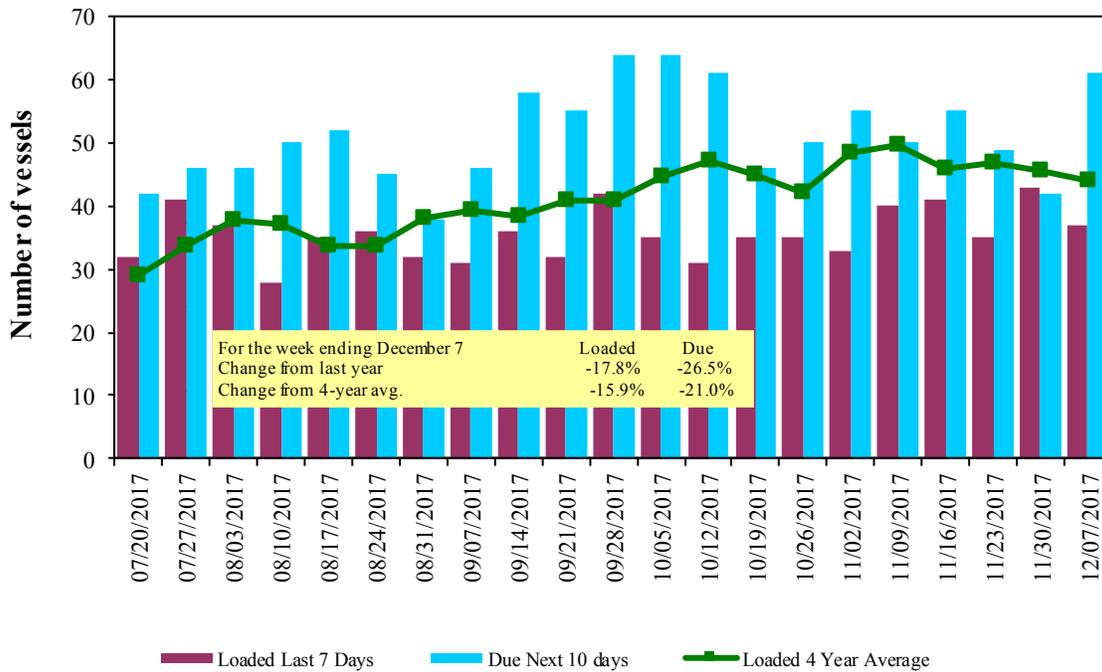
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/7/2017	38	37	61	9
11/30/2017	48	43	42	9
2016 range	(21..62)	(27..55)	(40..87)	(6..27)
2016 avg.	43	40	62	15

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

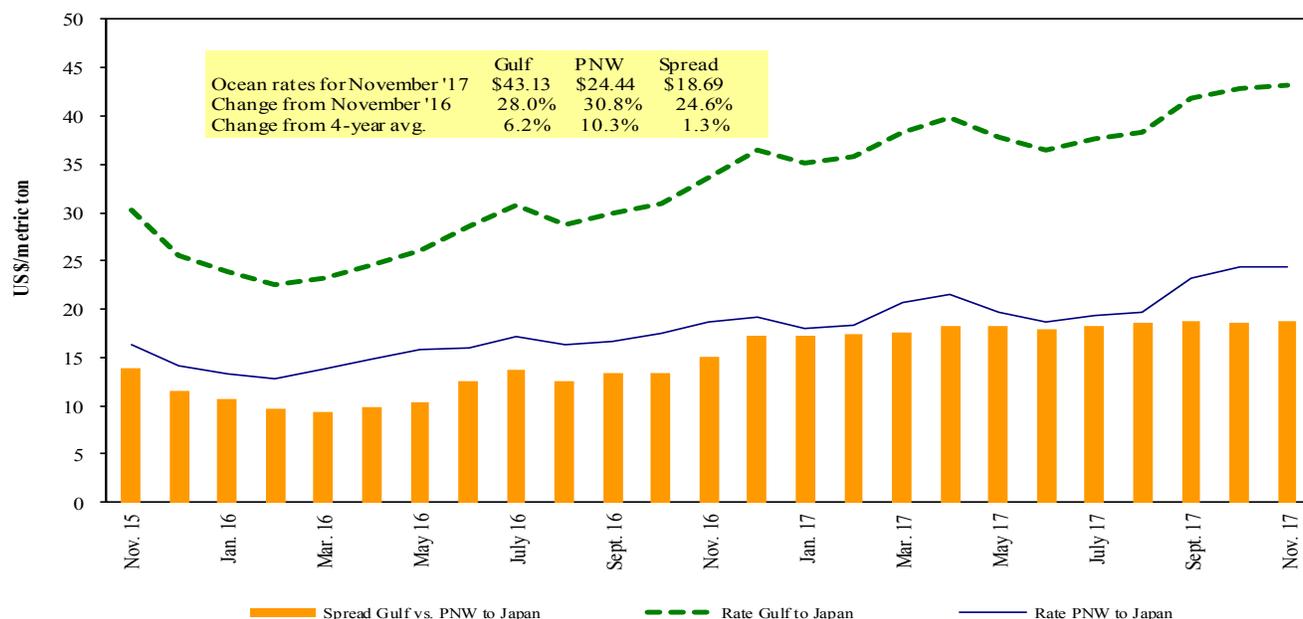
U.S. Gulf Vessel Loading Activity



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 12/09/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Dec 15/20	60,000	44.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	43.25
U.S. Gulf	China	Heavy Grain	Nov 27/Dec 5	47,700	40.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	China	Heavy Grain	Nov 10/15	66,000	40.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.75
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.50
U.S. Gulf	Dakar	Wheat	Nov 20/30	7,500	73.89*
U.S. Gulf	Somali	Sorghum	Dec 1/10	10,640	192.10*
PNW	China	Heavy Grain	Dec 15/24	60,000	23.75
PNW	Bangladesh	Wheat	Sep 29/Oct 9	13,620	58.00*
PNW	South Korea	Heavy Grain	Dec 14/20	60,000	24.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	31.90
Brazil	China	Heavy Grain	Nov 20/30	60,000	33.75
Brazil	China	Heavy Grain	Nov 1/10	60,000	31.90
Brazil	China	Heavy Grain	Oct 25/Nov 10	60,000	32.50
Brazil	S. Korea	Heavy Grain	Nov 22/29	63,000	33.25

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

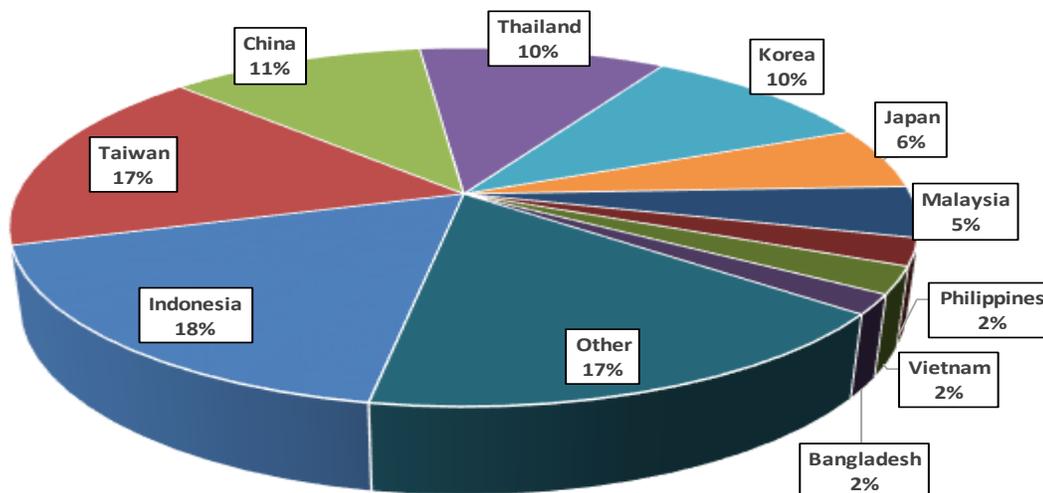
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-September 2017

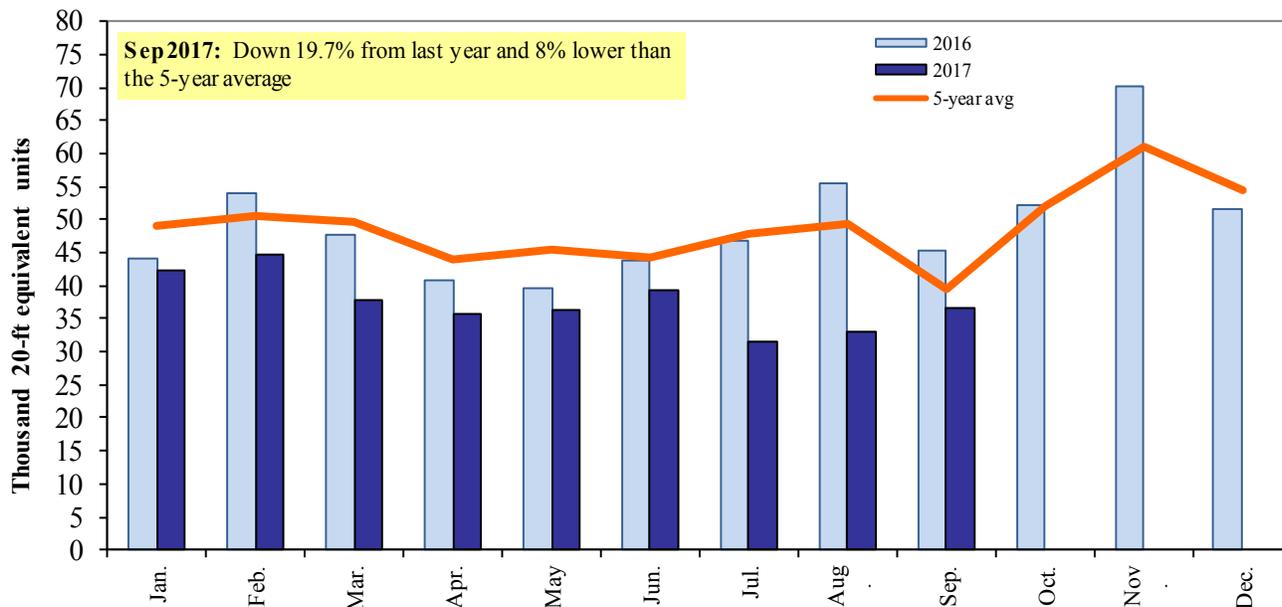


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

Contacts and Links

Coordinators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
Pierre Bahizi	pierre.bahizi@ams.usda.gov	(202) 690 - 0992
Adam Sparger	adam.sparger@ams.usda.gov	(202) 205 - 8701

Weekly Highlight Editors

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor	april.taylor@ams.usda.gov	(202) 720 - 7880
Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430

Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
-------------------------------	--	------------------

Rail Transportation

Adam Sparger	adam.sparger@ams.usda.gov	(202) 205 - 8701
Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
Jesse Gastelle	jesse.gastelle@ams.usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@ams.usda.gov	(202) 690 - 3244

Barge Transportation

Nicholas Marathon	nick.marathon@ams.usda.gov	(202) 690 - 4430
April Taylor	april.taylor@ams.usda.gov	(202) 720 - 7880
Matt Chang	matt.chang@ams.usda.gov	(202) 720 - 0299

Truck Transportation

April Taylor	april.taylor@ams.usda.gov	(202) 720 - 7880
Sergio Sotelo	sergioa.sotelo@ams.usda.gov	(202) 756 - 2577

Grain Exports

Johnny Hill	johnny.hill@ams.usda.gov	(202) 690 - 3295
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Ocean Transportation

Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@ams.usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@ams.usda.gov	(202) 720 - 7880

Subscription Information: Send relevant information to GTRContactUs@ams.usda.gov for an electronic copy (*printed copies are also available upon request*).

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