



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

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WEEKLY HIGHLIGHTS

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Rail Deliveries to Port Outpace Last Year

Year-to-date rail deliveries of U.S. grain to port for export are up noticeably from the same time last year (**Table 3**). Deliveries of grain are up mainly due to increasing demand from Asia and Latin America. Year-to-date rail deliveries of grain are up 23 percent in the Pacific Northwest (PNW); up 30 percent in the Texas Gulf; up 137 percent in the Mississippi Gulf; and up 18 percent in the Atlantic region. For the same period, increased rail deliveries can also be reflected in increased U.S. grain inspected for export, which is currently up 26 percent from last year (**Table 16**). In addition, cross-border movements of grain, which are shipped primarily to Mexico, are up 10 percent from last year, and Interior grain inspections are up 24 percent for the same period. Year-to-date grain inspections are up substantially in each of the other major export regions, with the exception of the Atlantic.

La Grange Lock Repairs Underway

On June 15, the U.S. Army Corps of Engineers began working on necessary repairs to La Grange Lock on the Illinois River. Presently, water levels are high enough to allow barge traffic to transit the site through the navigable pass. As of June 20, expected rainfall and water releases from upstream Peoria Lock and Dam will yield sufficient water levels to allow barges to continue to bypass the lock. However, by late-June or early July, water levels will likely recede and force all barge traffic through the lock chamber. While La Grange Lock repair work is underway, the lock will be closed 10 hours each day and opened to traffic for 14 hours each day, until the repairs are completed in mid-September. In addition, tows will be restricted to transiting the lock with sets of two barges side-by-side (70 feet) instead of the standard three barges side-by-side (105 feet).

Congestion Lessens at Seattle's Terminal 18

Last week, the Journal of Commerce reported that congestion was easing at Seattle Terminal 18, Seattle's largest container terminal. Traffic had increased substantially at the terminal in May, following the restructuring of global vessel-sharing alliances on April 1. It took time for the effects of the new rotations to take shape, with ports along the West Coast affected to varying degrees. According to the article, some shippers are still experiencing delays. In 2015, the Port of Seattle moved more than 5.2 million metric tons of waterborne agricultural export cargo, about 39 percent of which was containerized (see USDA-AMS's 2017 *Profiles of Top U.S. Agricultural Ports, Seattle, WA Export/Import Profile*). About 37 percent of Seattle's agricultural export cargo was animal feed in 2015.

Snapshots by Sector

Export Sales

For the week ending June 8, **unshipped balances** of wheat, corn, and soybeans totaled 23.8 million metric tons (mmt), down 9 percent from the same time last year. Net weekly **wheat export sales** were .373 mmt, down 19 percent from the previous week. Net **corn export sales** were .601 mmt, up 72 percent from the previous week, and net **soybean export sales** were .340 mmt, up 114 percent from the past week.

Rail

U.S. Class I railroads originated 22,409 **grain carloads** for the week ending June 10, down 2 percent from the previous week, up 10 percent from last year, and up 16 percent from the 3-year average.

Average July shuttle **secondary railcar** bids/offers per car were \$153 below tariff for the week ending June 15, up \$47 from last week, and \$91 lower than last year. Average non-shuttle secondary railcar bids/offers per car were \$25 below tariff, down \$13 from last week, and \$19 lower than last year.

Barge

For the week ending June 17, **barge grain movements** totaled 566,747 tons, 22 percent lower than the last week, and down 36 percent from the same period last year.

For the week ending June 17, 356 grain barges **moved down river**, down 23 percent from last week, 556 grain barges were **unloaded in New Orleans**, up 4 percent from the previous week.

Ocean

For the week ending June 15, 36 **ocean-going grain vessels** were loaded in the Gulf, 5 percent less than the same period last year. Fifty-four vessels are expected to be loaded within the next 10 days, 8 percent more than the same period last year.

For the week ending June 15, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$36.25 per metric ton, 1 percent more than the previous week. The cost of shipping from the PNW to Japan was \$18.50 per metric ton, 3 percent more than the previous week.

Fuel

During the week ending June 19, **average diesel fuel prices** decreased almost 4 cents from the previous week to \$2.49 per gallon, 6 cents higher than the same week last year.

Feature Article/Calendar

Grain Transportation Update: Mid-Year Review

The transportation sector has continued to see substantial shipments of grain through the first half of 2017. Year-to-date grain rail carloads are up compared to last year's volume despite persistent weather-related disruptions in the first quarter. First quarter grain barge deliveries in the Gulf have been at record levels, averaging 836 barges per week, 27 percent higher than the 5-year average. Year-to-date ocean-going grain vessel loading activity in the U.S. Gulf and Pacific Northwest (PNW) are above the same period last year. The ocean freight rates for shipping bulk grains have declined from the year-to-date peaks attained during April. Average diesel fuel prices have been fluctuating and are, so far, above the U.S. Energy Information Administration (EIA) forecast for the year. Grain truck usage index is above average during the 1st quarter (June 30, 2017 [Grain Truck and Ocean Rate Advisory](#)). However, demand for grain transportation may decline in the coming months relative to previous years, as USDA forecasts a drop in corn, soybean, and wheat production and exports.

Grain Production and Export Projections Decrease

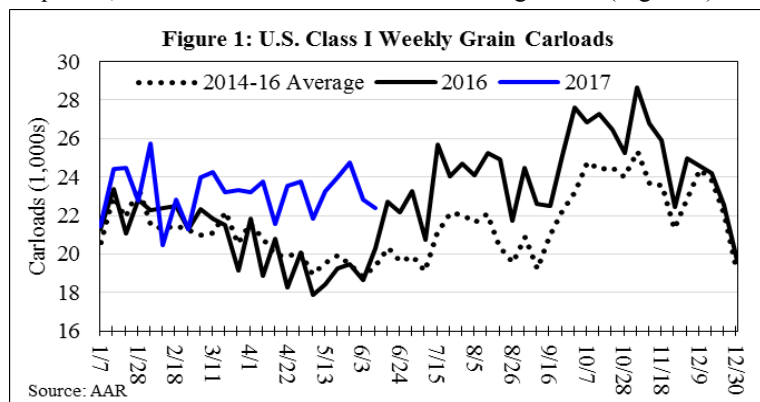
According to the June [World Agricultural Supply and Demand Estimates \(WASDE\)](#) report, USDA forecasts 2017/18 crop production to be 20.1 billion bushels (bbu) for corn, soybeans, and wheat, down 7 percent from the past year (Table 1).¹ USDA projects total grain exports to reach 5.3 bbu for the 2017/18 marketing year, 5 percent below last year. Exports of corn and wheat are projected to decrease 15 and 3 percent, respectively, from last year, but soybeans are expected to increase 5 percent. Outstanding (unshipped) export sales for the three major grains are 9 percent below the same time last year, but slightly above the 4-week average ([Table 12](#) of the [Grain Transportation Report \(GTR\)](#)). Based on USDA's projections for exports and domestic use, transportation demand for grain may fall for corn and wheat, but remain steady or increase for soybeans.

	Corn	Soybeans	Wheat	Total	Y/Y
<i>2017/18 (Projected)</i>					
Production	14,065	4,255	1,824	20,144	-7.4%
Exports	1,875	2,150	1,000	5,025	-5.4%
Domestic Use	12,425	2,085	1,191	15,701	0.3%
Ending Stocks/Use	16.5%	9.0%	49.0%		
<i>2016/17 (Estimated)</i>					
Production	15,148	4,307	2,310	21,765	11.1%
Exports	2,225	2,050	1,035	5,310	15.2%
Domestic Use	12,420	2,028	1,206	15,654	4.7%
Ending Stocks/Use	16.5%	9.0%	49.0%		
<i>2015/16</i>					
Production	13,602	3,926	2,062	19,590	
Exports	1,898	1,936	775	4,609	
Domestic Use	11,766	2,008	1,177	14,951	
Ending Stocks/Use	12.7%	9.2%	50.6%		

Grain Remains Strong for Railroads into 2017

Total carload traffic for U.S. Class I railroads is up 7 percent so far in 2017 compared to the same period last year, boosted by increases in coal, agricultural products, metallic ores and metals, and nonmetallic minerals. According to the Association of American Railroads (AAR), U.S. Class I railroads originated 12 percent more grain carloads this year (through June 10) over 2016. Grain carloadings rallied in early March, after railroads faced bouts of severe winter weather and precipitation during the first quarter, and have remained well above-average since (Figure 1).

In terms of other metrics, train speeds for grain have slowed in 2017 compared to 2016, likely reflecting increased traffic on the network. While train speeds for grain units on U.S. Class I railroads recovered from relative lows in February and March (as railroads worked through weather-related disruptions), they averaged 21.4 miles per hour over the past 8 weeks, 6 percent below the same period in 2016.² The secondary auction market for shuttle service reflected the service delays and



¹ As noted in the report, "Because planting is still underway in the Northern Hemisphere and remains several months away in the Southern Hemisphere, these projections are highly tentative."

² Data are for the week ending June 9, 2017. Source: Association of American Railroads, [Railroad Performance Measures data](#).

congestion to some degree, with above-average prices for railcar delivery during the months of February, March, and early April. However, prices for shuttle service in May and June were generally below average. Since January 2017, rail tariff rates for major U.S. origins and destinations have remained relatively constant for corn, soybeans, and wheat, with wheat rail rates increasing slightly from May to June ([Table 7](#) of the *GTR*).

2017 Grain Barge Traffic Above Average for First and Second Quarter

The number of grain barges unloaded and inspected for export (deliveries) at the Mississippi River-Gulf of Mexico was 39,337 in 2016 (Table 2). This was 18 percent higher than the 5-year average and the record annual total since record keeping began in 2005.¹ Barge deliveries for 2017 are off to a good start with an average of 836 per week for the first quarter, a record for that period. The number of second quarter grain barge deliveries was 552, 11 percent higher than the 5-year average. First and second quarter barge deliveries have been strong after a large crop and favorable winter navigation conditions. Weak first and second quarter movements occurred during 2013 when drought reduced the 2012/13 crop year harvest and made for poor navigation conditions during the beginning of 2013. Typically, barge deliveries are the highest in the fourth quarter, followed by the first quarter, then the third quarter, and the lowest number of deliveries during the second quarter.

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Annual Total
2012	626	441	501	723	29,798
2013	490	312	431	844	26,997
2014	760	569	528	874	35,513
2015	713	556	599	869	35,589
2016	689	608	777	952	39,337
Average	656	497	567	853	33,447
2017	836	552*			

Source: USDA/GIPSA
* as of June 17, 2017

Second quarter spot barge rates for the lower Illinois River were 264 percent of tariff (\$12.25 per ton), lower than last year’s 289 percent of tariff (\$13.41 per ton), and lower than the 5-year average of 333 percent of tariff (\$15.42 per ton). Current second quarter spot rates have been reported at being lower than average for other major grain-originating locations. Despite high water conditions that have persisted throughout the year, barge logistics and supply has been adequate, with no adverse effect on freight rates. The recent start of repair work at La Grange Lock on the Illinois River has the potential to limit barge logistics with a partial closure of that lock for the next 3 months. As of June 20, lower Illinois River barge rates were 295 percent of tariff (\$13.69 per ton), 16 percent higher than last week (see [La Grange Lock Repairs Underway highlight](#) on the first page).

Dry-Bulk Ocean Freight Market Could not Sustain Early Year Rates Increase

Ocean freight rates for shipping bulk commodities, including grain, rose during the early part of this year, and reached year-to-date peaks in April. However, the rates have declined since then. As of June 15, 2017, the ocean freight rate for shipping bulk grains from the U.S. Gulf to Japan was \$36.25 per metric ton (mt)—a 10 percent drop from the year-to-date peak of \$40.50 per mt on April 20. The rate for shipping bulk grains from the PNW to Japan was \$18.50 per mt—a 16 percent decline from the year-to-date peak of \$22.25 per mt on April 13. The bulk shipping market could not sustain the rally that occurred during the early part of the year, as excess vessel supply persists amid lagging demand for moving bulk materials (see June 15, 2017 *GTR*).

So Far, Diesel Prices Meet the 2017 Forecast

During the first half of 2017, diesel prices have fluctuated within the range of \$2.49 to \$2.60 per gallon. EIA previously forecasted this year’s average price per gallon to be nearly 40 cents above last year (see September 22, 2016 *GTR*); the average price during first 25 weeks of 2017 was 39 cents higher than the same period last year. EIA’s latest *Short Term Energy Outlook* reported that historic industrial and manufacturing activities are increasing their demand for distillate fuel oil. Diesel fuel prices could significantly impact the overall cost of transportation and consequently, grain truck usage. Stable fuel prices can remove an element of uncertainty in the overall supply chain. GTRContactUs@ams.usda.gov

¹ The number of weekly unloaded grain barges inspected for export is supplied by the USDA’s Grain Inspection, Packers & Stockyards Administration (GIPSA). This data set was initiated after Hurricane Katrina in 2005 to assess barge delivery performance after a major disruption, but the GTR continues to report the weekly data. 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		
06/21/17	167	263	204		164	162		131
06/14/17	169	261	202		142	161		128

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)

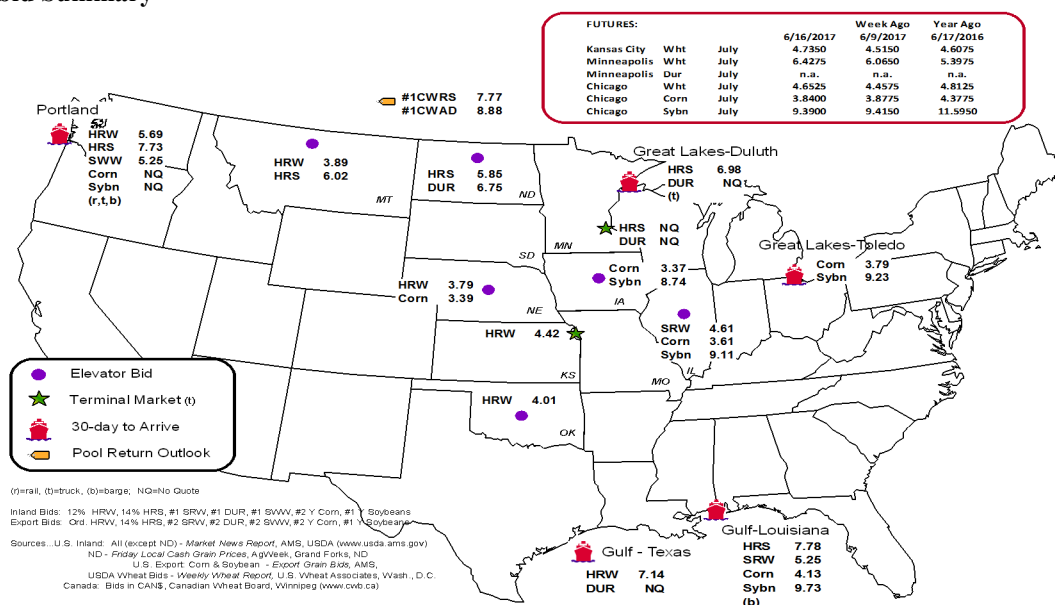
Commodity	Origin--Destination	6/16/2017	6/9/2017
Corn	IL--Gulf	-0.52	-0.51
Corn	NE--Gulf	-0.74	-0.76
Soybean	IA--Gulf	-0.99	-1.02
HRW	KS--Gulf	-2.72	-2.16
HRS	ND--Portland	-1.88	-2.06

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

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1
Grain Bid Summary



Rail Transportation

Table 3
Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
06/14/2017 ^p	231	1,635	6,260	n/a	8,126	6/10/2017	2,737
06/07/2017 ^r	270	1,842	6,308	n/a	8,420	6/3/2017	2,380
2017 YTD ^r	14,324	45,661	146,510	10,886	217,381	2017 YTD	54,022
2016 YTD ^r	6,054	35,064	118,665	9,264	169,047	2016 YTD	49,058
2017 YTD as % of 2016 YTD	237	130	123	118	129	% change YTD	110
Last 4 weeks as % of 2016 ²	559	112	155	231	149	Last 4wks % 2016	120
Last 4 weeks as % of 4-year avg. ²	375	120	222	97	190	Last 4wks % 4 yr	138
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

¹ Data is incomplete as it is voluntarily provided

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

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

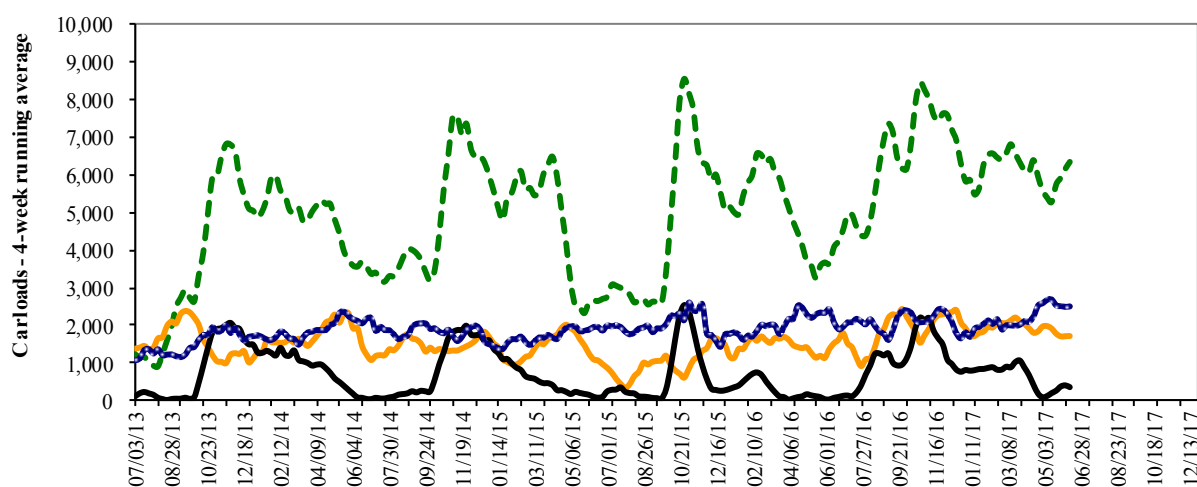
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



--- Pacific Northwest: 4 wks. ending 6/14--up 55% from same period last year; up 122% from 4-year average
--- Texas Gulf: 4 wks. ending 6/14--up 12% from same period last year; up 20% from the 4-year average
--- Miss. River: 4 wks. ending 6/14--up 459% from same period last year; up 275% from 4-year average
--- Cross-border: 4 wks. ending 6/10--up 20% from same period last year; up 38% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

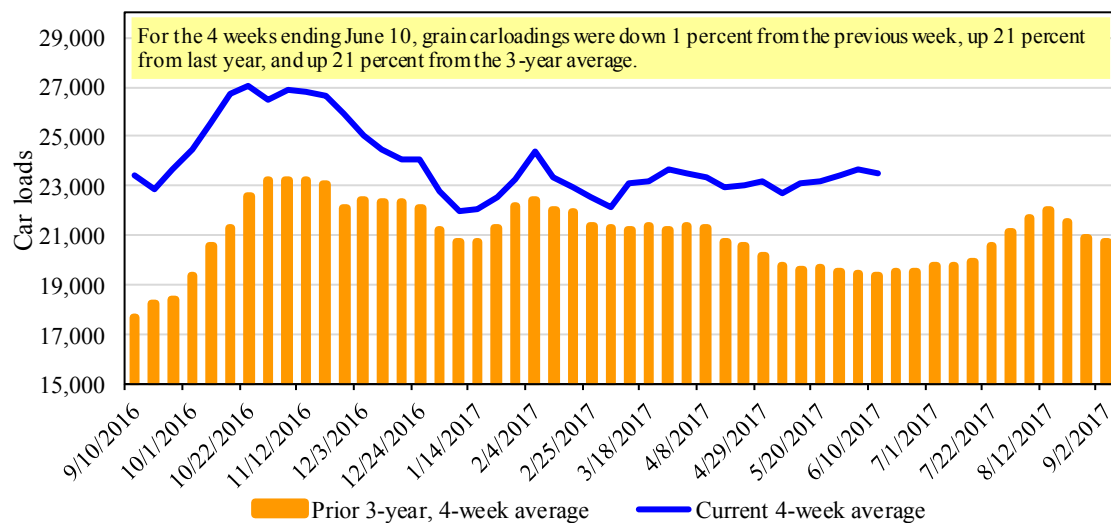
For the week ending: 6/10/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,652	2,548	12,197	860	5,152	22,409	3,737	4,432
This week last year	1,275	3,316	10,610	337	4,762	20,300	2,676	4,330
2017 YTD	41,523	64,080	267,518	22,057	138,034	533,212	89,588	99,920
2016 YTD	41,951	63,966	230,433	19,832	119,544	475,726	73,855	95,292
2017 YTD as % of 2016 YTD	99	100	116	111	115	112	121	105
Last 4 weeks as % of 2016*	102	94	138	118	112	121	139	120
Last 4 weeks as % of 3-yr avg.**	93	97	143	110	108	121	97	94
Total 2016	95,179	151,024	590,779	45,246	300,836	1,183,064	193,964	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: 6/15/2017		Delivery period							
		Jul-17	Jul-16	Aug-17	Aug-16	Sep-17	Sep-16	Oct-17	Oct-16
BNSF ³	COT grain units	0	0	0	0	no bids	0	no bids	0
	COT grain single-car ⁵	0	0	no bids	0-3	0	0-5	0	0-5
UP ⁴	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

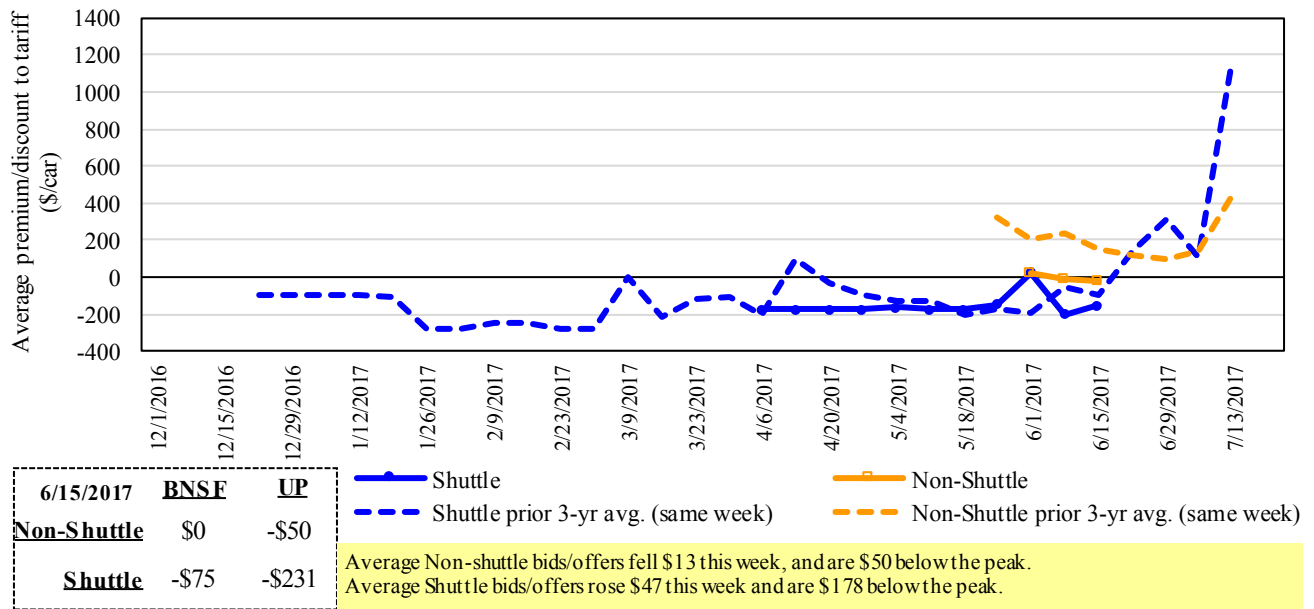
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

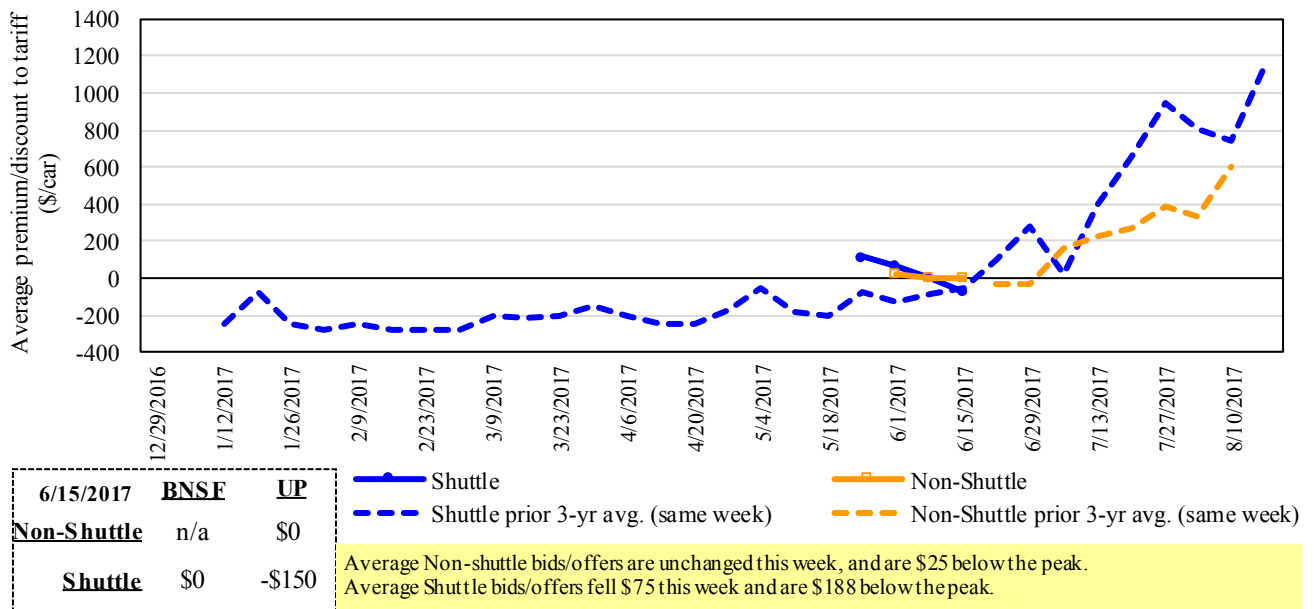
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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

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



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

Figure 6

Bids/Offers for Railcars to be Delivered in September 2017, Secondary Market

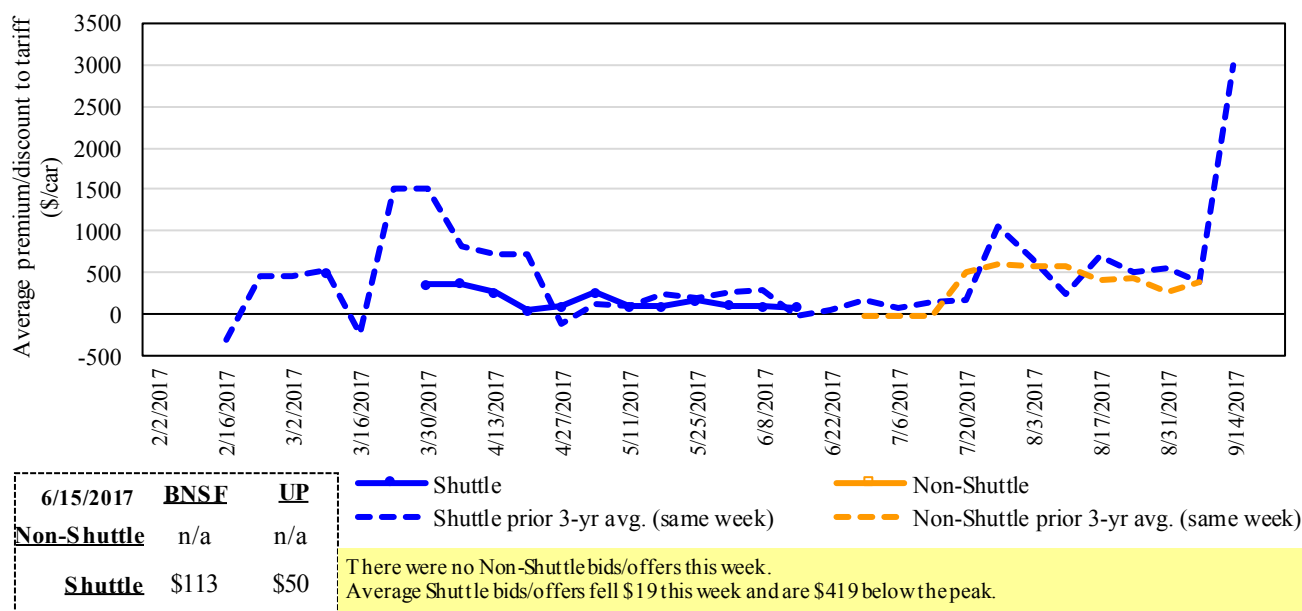


Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending:		Delivery period					
		Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17
6/15/2017							
Non-shuttle	BNSF-GF	0	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 2016	(50)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(50)	0	n/a	n/a	n/a	n/a
	Change from last week	(25)	0	n/a	n/a	n/a	n/a
	Change from same week 2016	13	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(75)	0	113	1600	n/a	0
	Change from last week	n/a	n/a	(38)	n/a	n/a	0
	Change from same week 2016	n/a	n/a	113	800	n/a	50
	UP-Pool	(231)	(150)	50	650	n/a	n/a
	Change from last week	(31)	(150)	0	0	n/a	n/a
	Change from same week 2016	(169)	(150)	0	150	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

June, 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	\$51	\$39.06	\$1.06	9	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	20	
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1	
	Wichita, KS	New Orleans, LA	\$4,540	\$89	\$45.97	\$1.25	9	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$98	\$48.79	\$1.33	9	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$136	\$51.21	\$1.39	9	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$101	\$37.55	\$0.95	3	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0	
	Des Moines, IA	Davenport, IA	\$2,258	\$21	\$22.63	\$0.57	5	
	Indianapolis, IN	Atlanta, GA	\$5,191	\$0	\$51.55	\$1.31	4	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	0	
	Des Moines, IA	Little Rock, AR	\$3,534	\$63	\$35.72	\$0.91	4	
	Des Moines, IA	Los Angeles, CA	\$5,202	\$182	\$53.47	\$1.36	7	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,634	\$74	\$36.83	\$1.00	0	
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	0	
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	0	
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	0	
	Champaign-Urbana, IL	New Orleans, LA	\$4,495	\$101	\$45.64	\$1.24	5	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	3	
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	8	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0	
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	2	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	2	
	Northwest KS	Portland, OR	\$5,812	\$160	\$59.30	\$1.61	9	
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	\$3,481	\$101	\$35.57	\$0.90	3	
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	3	
	Des Moines, IA	Amarillo, TX	\$3,895	\$79	\$39.46	\$1.00	5	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
	Council Bluffs, IA	Stockton, CA	\$4,740	\$0	\$47.07	\$1.20	2	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	2
		Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	3
		Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	2
Council Bluffs, IA		New Orleans, LA	\$4,525	\$116	\$46.09	\$1.25	5	
Toledo, OH		Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0	
Grand Island, NE	Portland, OR	\$5,460	\$164	\$55.85	\$1.52	5		

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

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

Sources: www.bnsf.com, www.cn.ca, www.csx.com, www.up.com

Table 8
Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico

Commodity	Origin		Tariff rate/car ¹	Fuel surcharge		Tariff plus surcharge per:		Percent change ⁴ Y/Y
	state	Destination region		per car ²	metric ton ³	bushel ³		
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0	
	OK	Cuautitlan, EM	\$6,631	\$70	\$68.46	\$1.86	3	
	KS	Guadalajara, JA	\$7,309	\$261	\$77.35	\$2.10	7	
	TX	Salinas Victoria, NL	\$4,292	\$43	\$44.29	\$1.20	5	
Corn	IA	Guadalajara, JA	\$8,187	\$212	\$85.82	\$2.18	3	
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	1	
	NE	Queretaro, QA	\$7,909	\$145	\$82.30	\$2.09	2	
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1	
	MO	Tlalnepantla, EM	\$7,268	\$142	\$75.71	\$1.92	2	
	SD	Torreón, CU	\$7,180	\$0	\$73.36	\$1.86	1	
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$223	\$90.63	\$2.46	2	
	NE	Guadalajara, JA	\$8,942	\$227	\$93.68	\$2.55	0	
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5	
	KS	Torreón, CU	\$7,489	\$152	\$78.07	\$2.12	2	
Sorghum	NE	Celaya, GJ	\$7,164	\$190	\$75.14	\$1.91	0	
	KS	Queretaro, QA	\$7,608	\$87	\$78.62	\$2.00	2	
	NE	Salinas Victoria, NL	\$6,213	\$70	\$64.19	\$1.63	2	
	NE	Torreón, CU	\$6,607	\$140	\$68.94	\$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

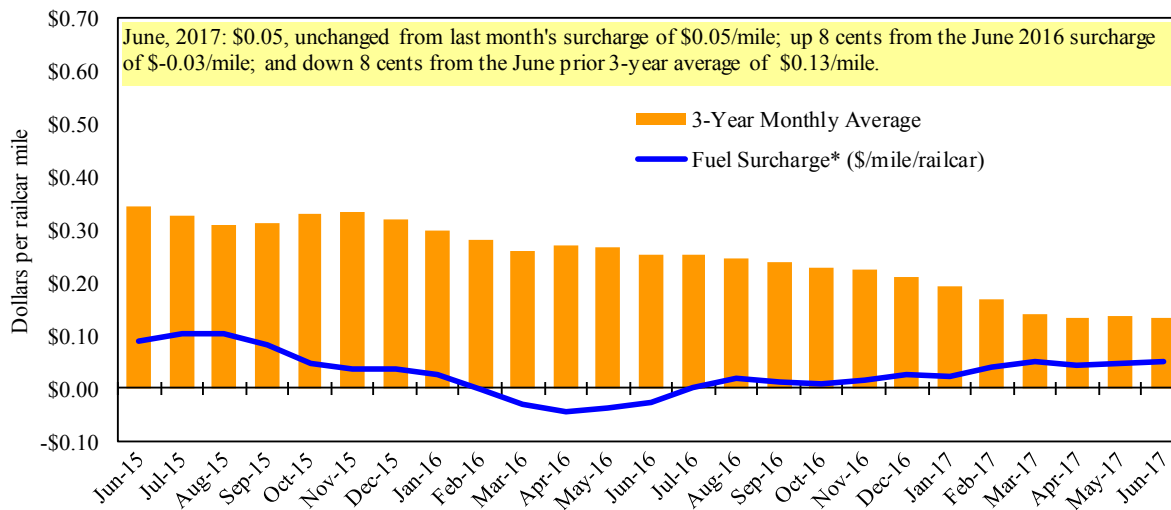
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

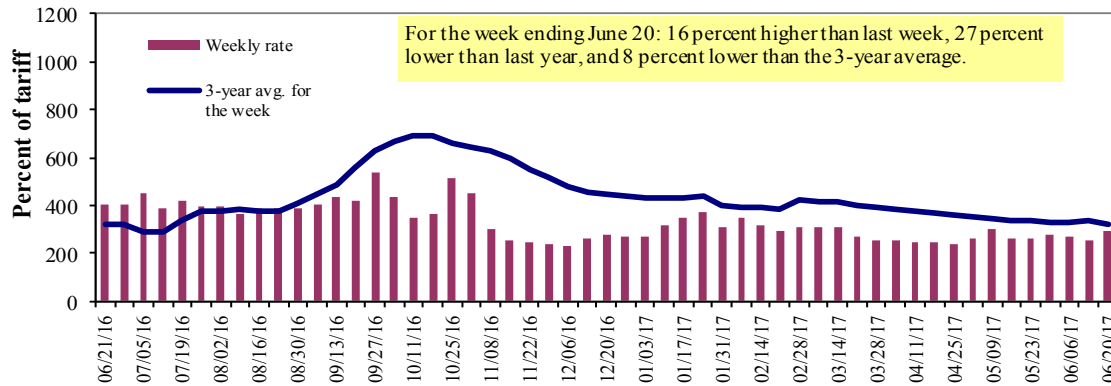
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	6/20/2017	343	283	295	198	195	195	178
	6/13/2017	318	260	255	183	193	193	168
\$/ton	6/20/2017	21.23	15.06	13.69	7.90	9.15	7.88	5.59
	6/13/2017	19.68	13.83	11.83	7.30	9.05	7.80	5.28
Current week % change from the same week:								
	Last year	-26	-32	-27	-34	-34	-34	-27
	3-year avg. ²	-19	-23	-8	-22	-19	-19	-17
Rate¹	July	343	288	293	193	195	195	178
	September	400	350	338	275	338	338	250

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds
Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

(Rate * 1976 tariff benchmark rate per ton)/100

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

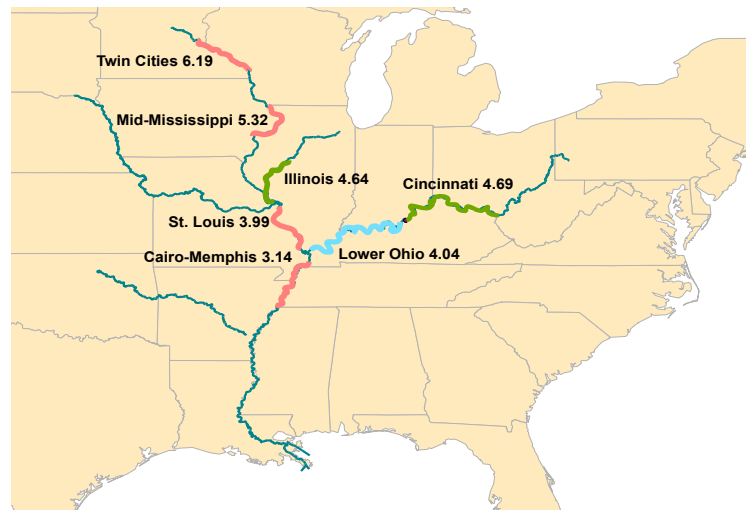
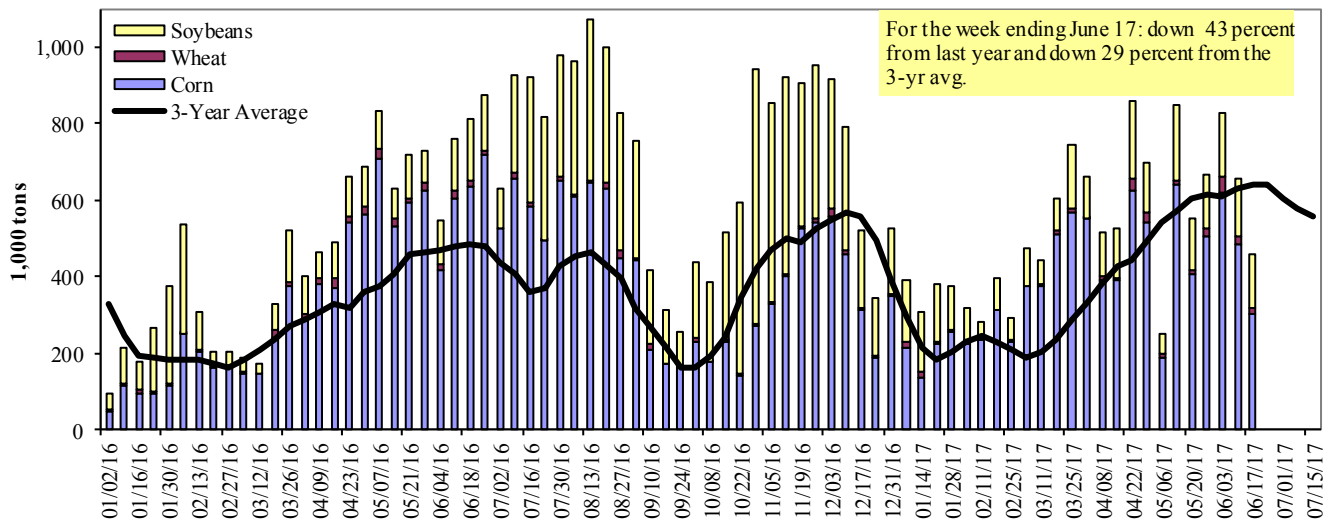


Figure 10

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 6/17/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	285	20	137	0	442
Winfield, MO (L25)	349	33	119	0	501
Alton, IL (L26)	321	14	129	0	465
Granite City, IL (L27)	303	14	142	0	459
Illinois River (L8)	70	10	41	0	120
Ohio River (L52)	28	9	39	5	82
Arkansas River (L1)	0	13	13	0	26
Weekly total - 2017	331	36	194	5	567
Weekly total - 2016	653	44	188	4	889
2017 YTD ¹	11,520	995	5,561	157	18,234
2016 YTD	10,941	861	4,777	146	16,724
2017 as % of 2016 YTD	105	116	116	108	109
Last 4 weeks as % of 2016 ²	87	94	120	75	94
Total 2016	24,136	2,030	16,668	344	43,178

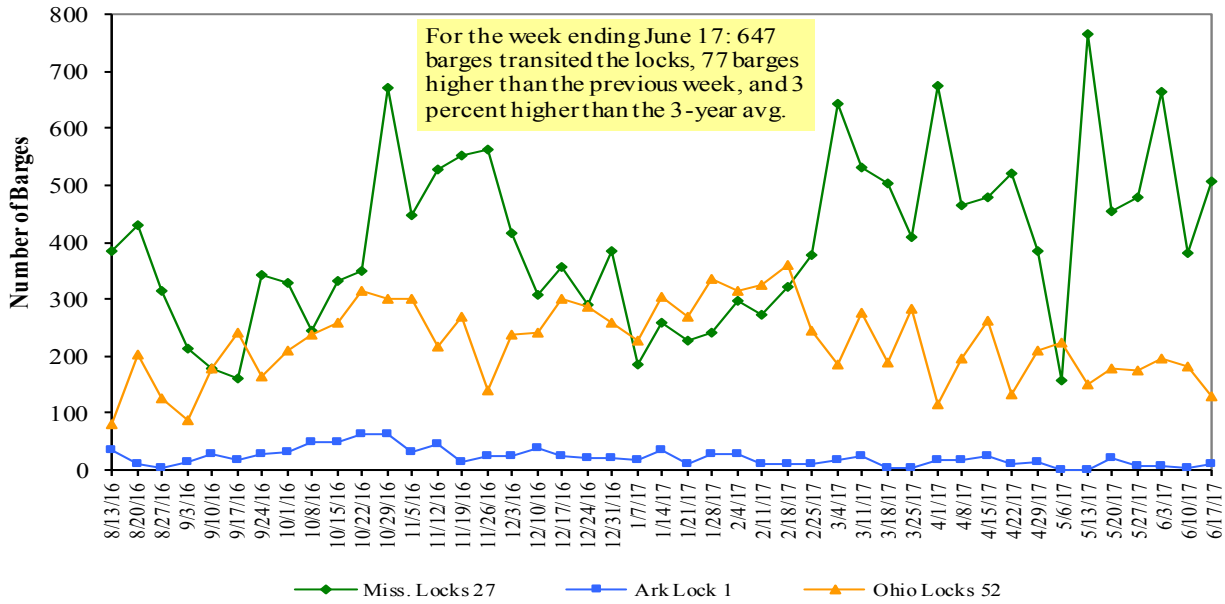
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

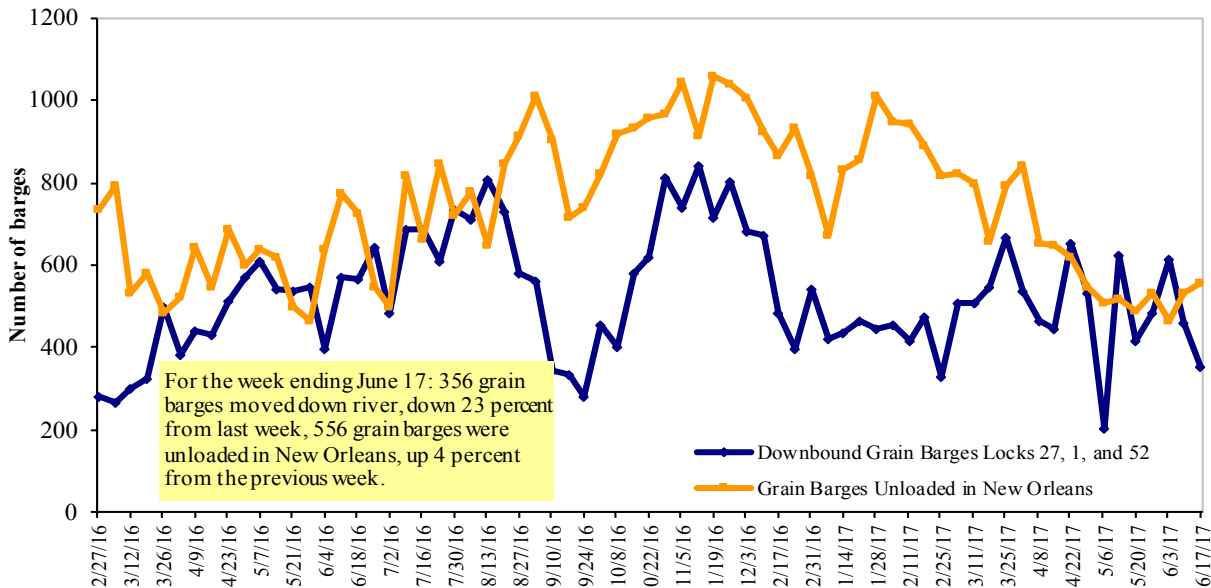
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 6/19/2017 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.539	-0.051	0.096
	New England	2.590	-0.036	0.096
	Central Atlantic	2.683	-0.054	0.141
	Lower Atlantic	2.427	-0.048	0.069
II	Midwest ²	2.411	-0.087	0.025
III	Gulf Coast ³	2.329	-0.082	0.033
IV	Rocky Mountain	2.625	-0.042	0.212
V	West Coast	2.782	-0.047	0.076
	West Coast less California	2.655	-0.058	0.049
	California	2.884	-0.039	0.098
Total	U.S.	2.489	-0.035	0.063

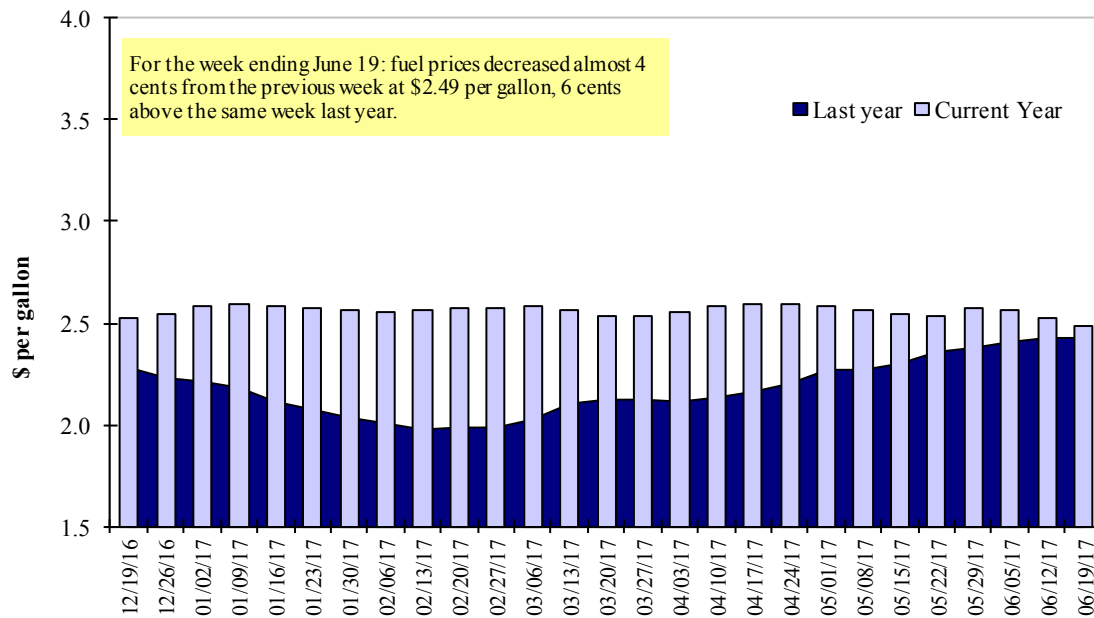
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export Balances¹									
6/8/2017	2,122	616	1,816	1,531	179	6,264	10,547	6,973	23,784
This week year ago	1,981	674	2,148	1,102	149	6,055	14,078	6,017	26,150
Cumulative exports-marketing year²									
2016/17 YTD	342	68	127	156	26	718	44,070	51,965	96,753
2015/16 YTD	216	64	120	70	3	472	31,466	43,253	75,191
YTD 2016/17 as % of 2015/16	158	107	106	224	883	152	140	120	129
Last 4 wks as % of same period 2015/16	78	65	60	100	85	75	82	118	88
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

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 6/08/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2017/18 Next MY	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -				- 1,000 mt -
Mexico	1,423	13,067	12,110	8	11,204
Japan	546	11,028	9,776	13	11,284
Korea	0	5,516	2,259	144	3,931
Colombia	7	4,122	4,427	(7)	4,134
Peru	28	2,860	1,977	45	2,109
Top 5 Importers	2,004	36,593	30,548	20	32,662
Total US corn export sales	2,755	54,617	44,634	22	46,633
% of Projected	6%	96%	92%		
Change from prior week ²	14	601	910		
Top 5 importers' share of U.S. corn export sales	73%	67%	68%		70%
USDA forecast, June 2017	47,710	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, June 2017	139,700	138,430	132,690	5	

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 6/08/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2017/18	2016/17	2015/16		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	1,102	35,957	27,393	31	29,033
Mexico	247	3,516	3,250	8	3,295
Indonesia	3	2,042	1,699	20	2,065
Japan	197	2,130	2,102	1	1,994
Netherlands	0	1,638	1,428	15	1,644
Top 5 importers	1,549	45,283	35,871	26	38,032
Total US soybean export sales	3,437	58,938	49,270	20	48,389
% of Projected	6%	106%	93%		
Change from prior week ²	314	340	817		
Top 5 importers' share of U.S. soybean export sales	45%	77%	73%		79%
USDA forecast, June 2017	58,583	55,858	52,752	6	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. The 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 6/08/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
		- 1,000 mt -		- 1,000 mt -
Japan	461	374	23	2,620
Mexico	1,003	662	51	2,743
Philippines	555	555	0	2,395
Brazil	30	142	(79)	862
Nigeria	274	266	3	1,254
Korea	591	335	76	1,104
China	323	196	65	1,623
Taiwan	203	149	36	768
Indonesia	190	25	660	726
Colombia	152	113	35	635
Top 10 importers	3,780	2,817	34	14,729
Total US wheat export sales	6,982	6,527	7	24,485
% of Projected	25%	31%		
Change from prior week ²	373	763		
Top 10 importers' share of U.S. wheat export sales	54%	43%		60%
USDA forecast, June 2017	28,202	21,117	34	

(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 06/15/17	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	490	419	117	7,385	5,666	130	141	164	12,325
Corn	304	338	90	7,685	4,377	176	159	175	12,009
Soybeans	69	148	46	4,448	4,425	101	n/a	n/a	14,447
Total	862	905	95	19,517	14,469	135	167	188	38,782
Mississippi Gulf									
Wheat	36	131	27	2,288	1,638	140	164	137	3,480
Corn	630	484	130	16,741	14,282	117	72	79	31,420
Soybeans	128	269	47	11,326	9,680	117	134	152	35,278
Total	794	885	90	30,354	25,600	119	87	94	70,178
Texas Gulf									
Wheat	247	223	111	3,476	1,515	229	143	158	6,019
Corn	0	0	n/a	376	440	85	32	31	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
Total	247	223	111	3,852	2,047	188	126	136	8,792
Interior									
Wheat	6	26	23	813	586	139	121	119	1,543
Corn	245	188	130	3,754	3,209	117	126	142	7,197
Soybeans	61	117	52	2,325	1,779	131	142	162	4,577
Total	312	331	94	6,892	5,573	124	130	145	13,317
Great Lakes									
Wheat	0	44	0	253	192	132	141	113	1,186
Corn	12	38	32	96	126	76	61	117	584
Soybeans	22	0	n/a	126	23	543	n/a	646	910
Total	35	83	42	475	341	140	126	143	2,681
Atlantic									
Wheat	0	0	n/a	37	182	20	62	1	315
Corn	0	0	n/a	5	14	38	n/a	0	294
Soybeans	11	4	244	905	874	104	108	160	2,269
Total	11	5	231	948	1,070	89	107	35	2,878
U.S. total from ports²									
Wheat	779	844	92	14,252	9,779	146	143	150	24,867
Corn	1,191	1,049	114	28,656	22,448	128	97	106	53,173
Soybeans	290	538	54	19,130	16,873	113	185	208	58,587
Total	2,260	2,431	93	62,038	49,100	126	119	129	136,627

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

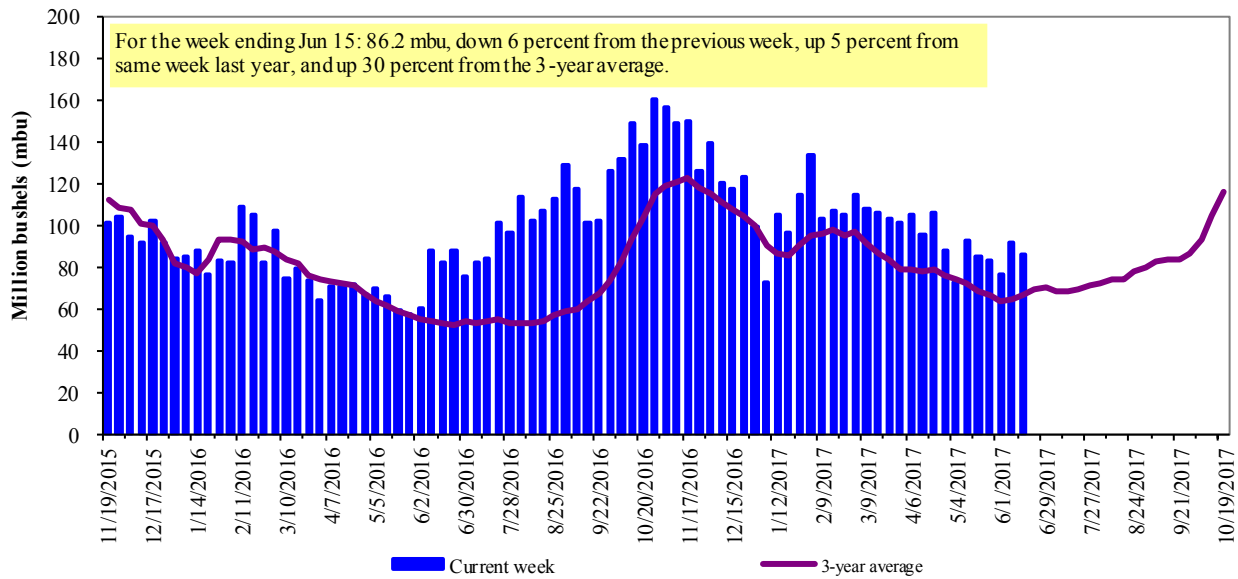
Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

² Total only includes regions shown above.

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)

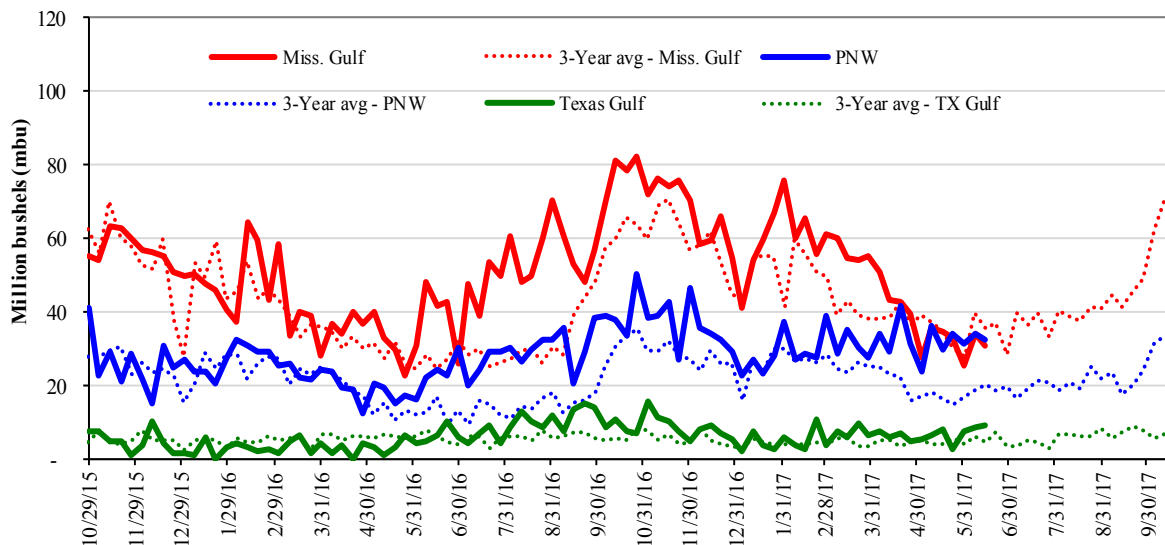


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)



<u>Week ending 06/15/17 inspections (mbu):</u>	<u>Percent change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Mississippi Gulf: 30.8	Last Week:	down 9	up 11	down 5	down 5
PNW: 32.5	Last Year (same week):	down 25	up 40	down 16	up 35
Texas Gulf: 9.1	3-yr avg (4-wk. mov. Avg):	down 7	up 78	up 5	up 84

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

¹The 3-year average is based on a 4-week running average

Ocean Transportation

Table 17

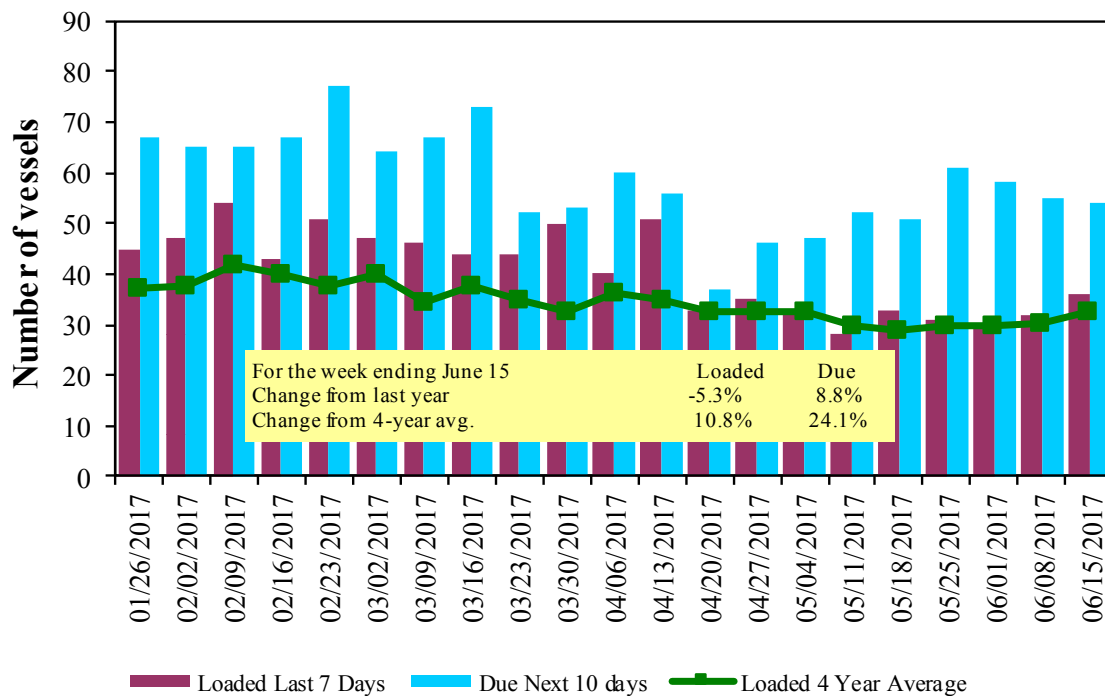
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
6/15/2017	40	36	54	21	n/a
6/8/2017	48	32	55	24	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg.	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

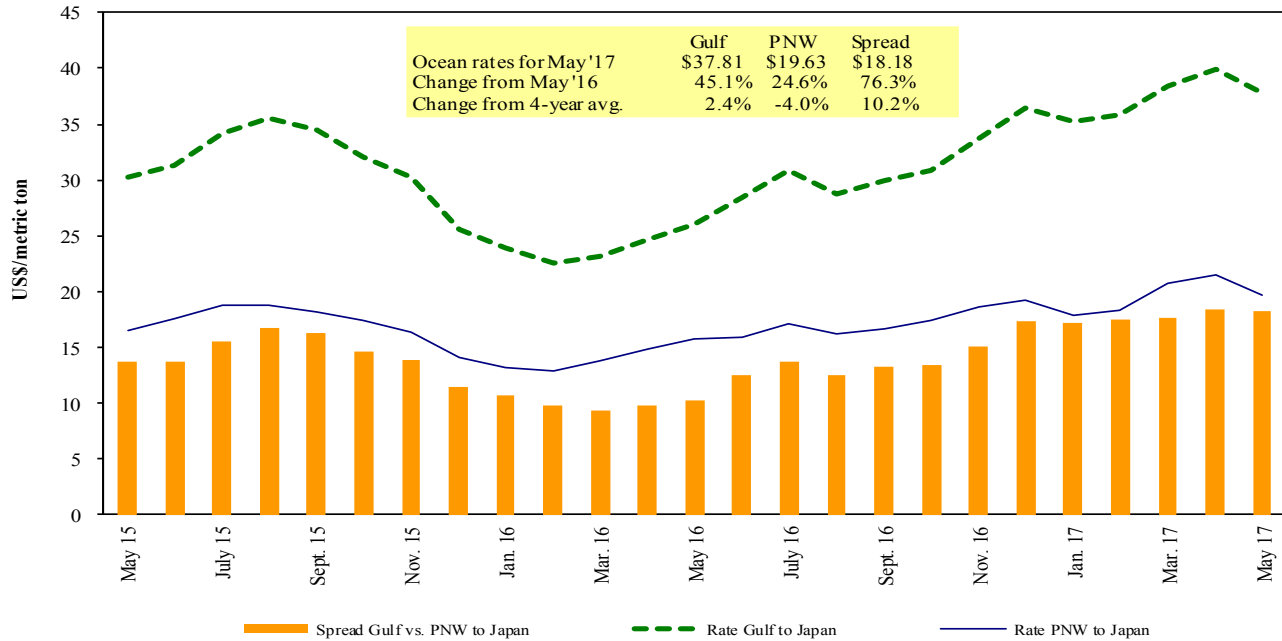
U.S. Gulf Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 06/17/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Cote d'Ivoire	Rice	Jun 19/29	6,000	93.33*
U.S. Gulf	Ghana	Rice	Jun 9/19	6,000	341.67*
U.S. Gulf	Ghana	Soybean Meal	Jun 9/19	5,000	86.75*
U.S. Gulf	Hiati	Wheat	Jul 3/13	20,000	80.00*
U.S. Gulf	Jordan	Wheat	Jun 19/28	50,000	36.00
PNW	Taiwan	Wheat	Jun 9/23	48,425	29.70
PNW	Taiwan	Wheat	May 6/20	52,500	28.48
PNW	Taiwan	Wheat	Apr 19/May 3	50,350	29.12
Brazil	China	Heavy Grain	Jul 15/30	60,000	22.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	24.00
Brazil	China	Heavy Grain	Jun 10/20	60,000	24.75
Brazil	China	Heavy Grain	May 20/30	60,000	25.50
Brazil	China	Heavy Grain	May 20/30	60,000	26.50
Brazil	Iran	Heavy Grain	Jun 15/18	70,000	22.75
EC S. America	China	Heavy Grain	May 20/30	60,000	29.75
River Plate	China	Heavy Grain	May 10/20	63,000	35.50

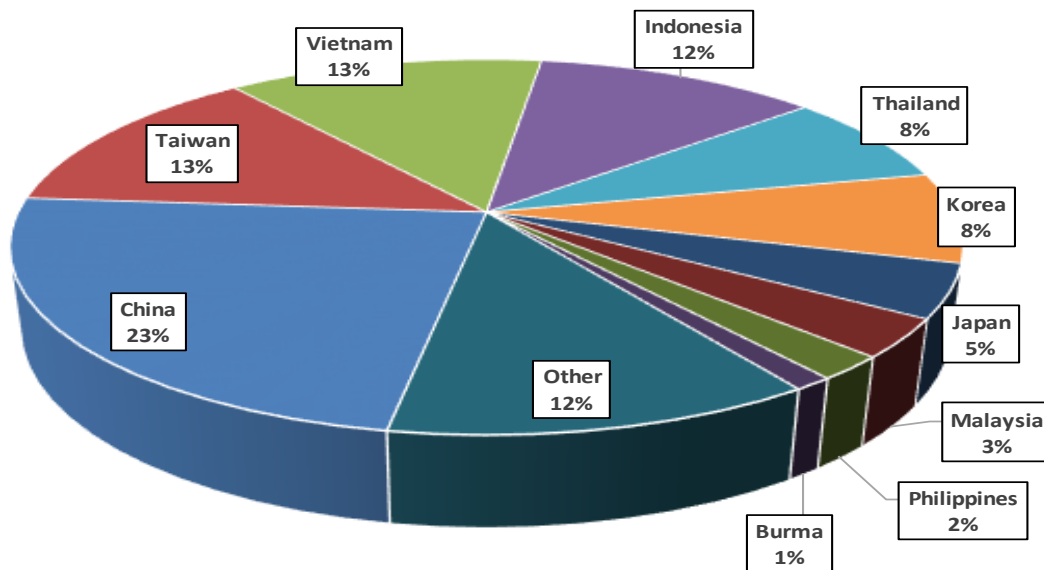
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

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

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-December 2016

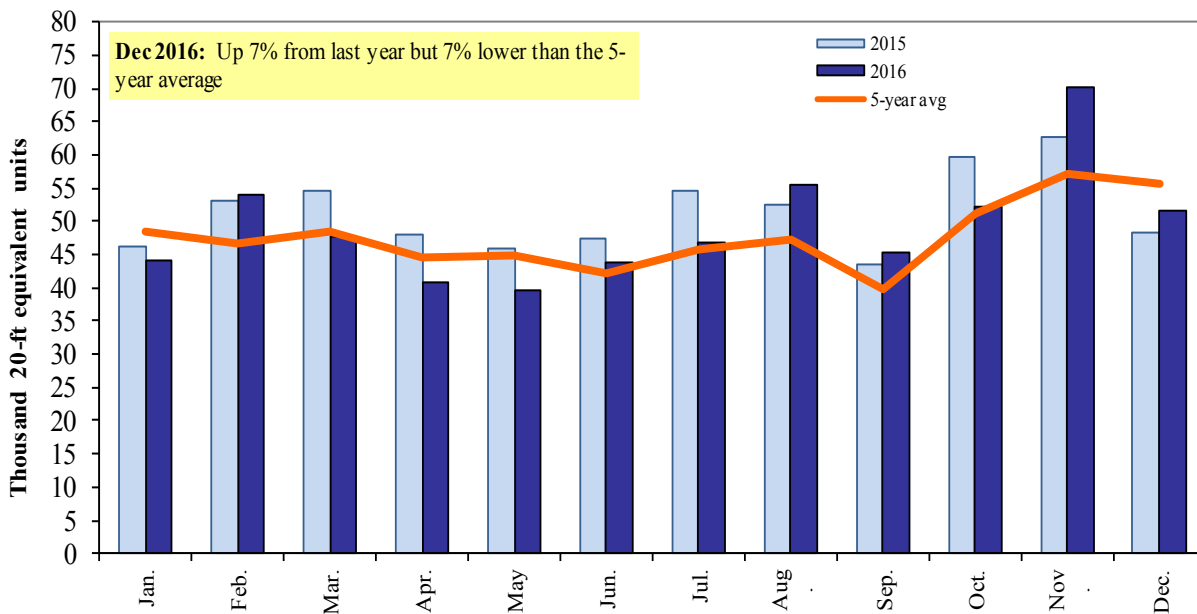


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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