



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

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Winter Storm Jonas Recovery Underway; Expect Delays

Following the at or near record snowfall in parts of the East, many, including the ports and railroads, are digging-out and working to restore service. Ports from New York to Norfolk were closed on Monday, and in some cases Tuesday as well, to clear terminals and ensure safe conditions for truck movements. Terminals reopened to heavy truck traffic and significant delays at many of the affected ports. In a service alert, Norfolk Southern said, "operations are extremely limited throughout the Northeast corridor, in particular between Wilmington and Baltimore. Traffic moving into the Conrail area within the state of New Jersey has been reduced to allow for recovery efforts. Areas in Virginia, West Virginia and Pennsylvania are recovering slowly. Customers should expect delays of 24-72 hours on traffic moving through these areas." CSX stated that several of the regions it serves are also impacted and to expect delays up to 48 hours.

Winter Flood Levels Continues to Decline

River levels are returning to normal operational levels on the Upper Mississippi River, however, water levels remain high on the entire lower Mississippi River. There have been several incidents of barges hitting bridges that span the Mississippi River. The Coast Guard has issued several restrictions in those areas that limit barge travel to daylight only. On January 10, the U.S. Army Corps of Engineers opened the Bonnet Carré Spillway, located above New Orleans, to keep river levels at New Orleans from rising further by diverting water out of the Mississippi River into Lake Pontchartrain. The Spillway will likely continue to be operational into early February.

Grain Inspections Recede

For the week ending January 21, **total inspections of grain** (corn, wheat, soybeans) for export from all major export regions reached 2.0 million metric tons (mmt), down 13 percent from the past week, 21 percent below last year, and 18 percent below the 3-year average. Wheat inspections continued to fall, decreasing 45 percent from the previous week as shipments dropped primarily to Asia. Soybean inspections dropped 11 percent from the past week. Corn inspections, however, increased 3 percent from the previous week. Pacific Northwest grain inspections dropped 15 percent from week-to-week while Mississippi Gulf grain inspections decreased 4 percent for the same period. Current outstanding export sales (unshipped) of grain were up for corn and wheat compared to the previous week, but were down for soybeans.

Snapshots by Sector

Export Sales

During the week ending January 14, **unshipped balances** of wheat, corn, and soybeans totaled 26 mmt, down 21 percent from the same time last year. Net weekly **wheat export sales** of .337 mmt were up 23 percent from the previous week. Net **corn export sales** were 1.16 mmt, up 73 percent from the previous week, and net **soybean export sales** of .909 mmt, down 14 percent from the past week.

Rail

U.S. Class I railroads originated 23,393 **carloads of grain** for the week ending January 16, up 11 percent from the previous week, down 7 percent from last year, and up 18 percent from the 3-year average.

Average February shuttle **secondary railcar bids/offers** per car were \$13 below tariff for the week ending January 21, up \$55 from last week, and \$288 higher than last year. Average non-shuttle secondary railcar bids/offers were \$63 below tariff, unchanged from last week, and \$63 lower than last year.

Barge

For the week ending January 23, **barge grain movements** totaled 606,350 tons, 3 percent higher than last week, and up 8 percent from the same period last year.

For the week ending January 23, 382 grain barges **moved down river**, up 6 percent from last week; 630 grain barges were **unloaded in New Orleans**, down 5 percent from the previous week.

Ocean

For the week ending January 21, 32 **ocean-going grain vessels** were loaded in the Gulf, 23.8 percent less than the same period last year. Fifty-six vessels are expected to be loaded within the next 10 days, 13.8 percent less than the same period last year.

For the week ending January 21, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$23.25 per metric ton (mt), down 5 percent from the previous week. The cost of shipping from the Pacific North West to Japan was \$13.00 per metric ton, down 3.7 percent from the previous week.

Fuel

During the week ending January 25, U.S. average **diesel fuel prices** decreased 4 cents from the previous week to \$2.07 per gallon—down \$0.80 from the same week last year.

Feature Article/Calendar

Grain Transportation Update

Despite a record soybean crop, the third highest corn crop, and a sizeable wheat crop, there were fewer transportation issues affecting the performance of the grain transportation system during the 2015/16 crop year¹ as compared to the previous year. Slow export demand, due to strong global supplies and a strong dollar, ultimately kept pressure off the transportation system. Record high inventories of crude oil supplies have kept diesel fuel prices low most of the year. Low fuel costs have offered relief for freight as well as agricultural production costs. Ocean-vessel activity has been strong and rates have been at their lowest levels since January 2009. Weather was a concern for barge operators as flooding slowed operations for periods throughout the year, however, annual tonnages were above average.

Corn Pulls Total Production Down

In the January World Agricultural Supply and Demand Estimates (WASDE) report, USDA reported lower production of corn but slightly higher soybean and wheat crops for the 2015/16 marketing year, causing total production (19.6 billion bushels)

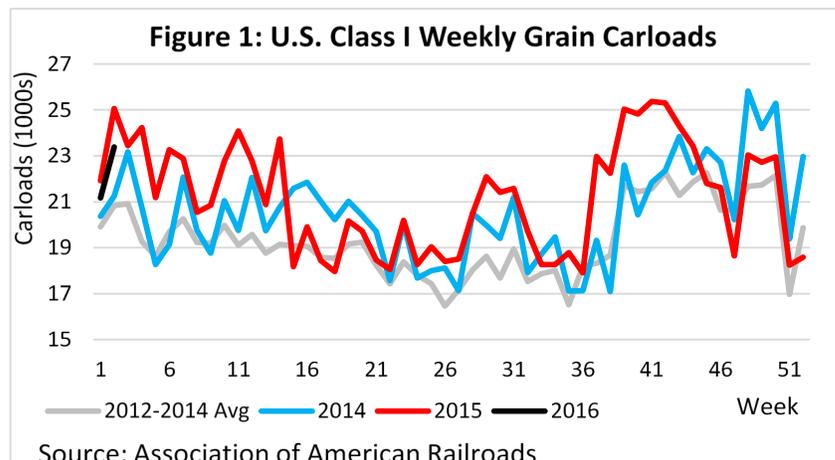
(bbu) to fall 3 percent lower than last year (See Table 1). Soybean exports are projected to reach 1.69 (bbu), down 8 percent from 2014/15. By January 14, 87 percent of the projected marketing-year soybean export sales had been recorded as export commitments, compared to 92 percent the same time last year (see Table 14 inside the Grain Transportation Report (GTR)). In terms of shipments, however, almost 65 percent of the projected marketing year total has already been shipped, 3 percentage points lower than this time last year. USDA projects 2015/16 corn exports to decrease 9 percent from last year. By January 14, 52 percent of the projected marketing year corn exports were reported as export commitments, 16 points lower than this time last year (see Table 13 in the GTR). In terms of corn shipments, 28 percent of the projected marketing year total exports have been shipped, 3 points lower than the same time last year. USDA projects wheat exports to decrease 6 percent from last year, with the pace of wheat exports a projected total 2 percentage points lower than last year this time.

Table 1. Major Grains: Production and Use, January 2016 WASDE, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2015/16 (Projected)					
Production	13,601	3,930	2,052	19,583	-2.9%
Exports	1,700	1,690	800	4,190	-8.1%
Domestic Use	11,870	2,021	1,183	15,074	0.1%
Ending Stocks/Use	13.3%	11.9%	47.5%		
United States 2014/15 (Estimated)					
Production	14,216	3,927	2,026	20,169	4.4%
Exports	1,864	1,843	854	4,561	-3.7%
Domestic Use	11,883	2,019	1,159	15,061	2.9%
Ending Stocks/Use	12.6%	4.9%	37.3%		
2013/14					
Production	13,829	3,358	2,135	19,322	
Exports	1,920	1,638	1,176	4,734	
Domestic Use	11,534	1,840	1,260	14,634	
Ending Stocks/Use	9.2%	2.6%	24.2%		

Grain exports, continue to be affected by abundant worldwide supplies and the strong dollar. Current outstanding (unshipped) balances of corn, soybeans, and wheat are lower than last year at this time, and exports of all three major grains for 2015/16 are projected to be lower than last year.

Slow Year for Railroads, but Strong Year for Grain Shippers

In general, 2015 was a slow year for U.S. Class I railroads. The Association of American Railroads (AAR) reported that total carloads (for all commodities) were down by 6 percent compared to 2014. A 12 percent decline in coal carloadings made up a significant portion of the overall decline. However, this was relatively good news for grain shippers. Carloads of grain increased by 3 percent over the 2014 total, and 2014 too was a strong year.

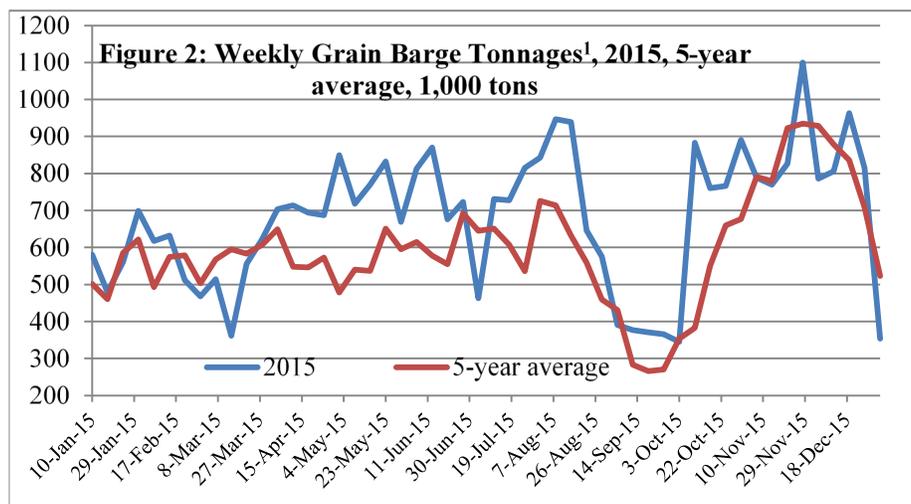


¹ The corn and soybean crop years begin on September 1; the wheat marketing year begins on June 1.

Grain carloads in 2015 were 9 percent above the prior 3-year average. Grain carloads also ended 2015 on a strong note, with fourth quarter grain carloads 10 percent above the previous quarter and 5 percent above the 3-year average for the fourth quarter. As of January 16, the average for the previous 4 weeks was 9 percent below the same 4-week period last year, but still 3 percent above the prior 3-year average. Rail service metrics tell a similar story. The decline in overall carloadings helped increased fluidity on the rail network. The major disruptions of 2013/2014 ended in the beginning of 2015. After April, terminal dwell times declined by 5 percent compared to the same months in 2014, while train speeds increased by 4 percent. Outstanding car orders fell from 16,637 reported on January 7, 2015 to 2,481 one year later on January 6, 2016, a decrease of 85 percent. Secondary railcar auction rates have generally been below zero throughout 2015. Secondary rates did rise somewhat for harvest months in October and November, but were considerably less than the previous year. Rail rates for grain are typically highest for service in October. In 2015, October bids for shuttle service in the secondary market averaged \$490, down 85 percent from the average 2014 October bid of \$3,088. Higher secondary railcar rates are an indicator of railcar scarcity, and the low 2015 rates illustrate a year of adequate supply.

Grain Barge Tonnages in 2015 Above Average Despite Adverse Navigation Conditions

In 2015, total grain barge tonnages¹ reached 35.5 million tons, about the same as last year's total of 35.1 million tons, and was 15 percent higher than the 5-year average. Figure 2 shows weekly tonnages were above levels for most of the year.



Weather has been a major concern for barge operators during 2015. Flood conditions hampered logistics at various times throughout the year. In addition, however, there were periods of low water during September and October that caused delays due to groundings and subsequent dredging activities. Repair work at Ohio River Locks and Dam 52, near Brookport, IL, also caused significant delays in September and October.

While barge logistics were less than ideal, barge rates were near average for most of the year until the beginning of corn and soybean harvest. Barge rates

peaked in late September and have since declined and been significantly below average. GTR figure 8 shows export grain barge rates for the Illinois River were 647 percent of tariff (\$30.02 per ton) in late September. As of January 26, Illinois River barge rates have dropped to 305 percent of tariff (\$14.15 per ton).

Dry-bulk Freight Market Continues Low Levels

Global ocean freight rates for shipping bulk commodities, including grain, continue to fall into the New Year and are currently at their lowest in 7 years. The basic reason for this market situation is quite simple: the world dry-bulk fleet is considerably bigger than global cargo demand. As of January 23, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$23.25 per metric ton (mt), a 32-percent decline from the same period last year, and 48 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest was \$13.00 per mt, a 30 percent decline from last year, and a 45 percent decline from the 4-year average. In the meantime, grain loading activity in the U.S. Gulf continues to be strong. During the past 8 weeks, an average of 40 ocean-going grain vessels were loaded per week, and 47 vessels were either being loaded or waiting to be loaded. An additional average of 59 vessels were expected to be loaded in the next 10 days. Ocean freight rates should continue to remain low at least in the near term until freight markets improve sufficiently to soak up the excess vessel capacity.

Low Crude Oil Prices Characterize 2015

Record low crude oil prices dominated the landscape of the fuel market in 2015. Crude oil prices fell more than \$15 over the year to around \$37 per barrel by the end of the year. As a result, diesel fuel prices fell more than \$1.00 per gallon in 2015, ending the year at \$2.24. Diesel prices have not been this low since 2009. Prices continued to fall into 2016. As of January 25, prices were \$2.07 per gallon. Crude oil prices fell to \$28 per barrel during the week of January 18. Inventories were strong throughout 2015, as U.S. ending stocks of crude oil and petroleum products rose nearly 250 million barrels over the year. The Energy Information Administration forecasts diesel fuel prices to average \$2.29 per gallon in 2016 and \$2.59 per gallon in 2017. GTRContactUs@ams.usda.gov

¹ As measured by down-bound tonnages at Mississippi River Locks 27, Ohio River Locks and Dam 52, and Arkansas River Lock and Dam 1. Data is provided by the U.S. Army Corps of Engineers

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

For the week ending	Truck	Rail	Barge		Ocean	
		Unit Train	Shuttle		Gulf	Pacific
01/27/16	139	273	218	169	104	92
01/20/16	142	268	222	156	110	96

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	1/22/2016	1/15/2016
Corn	IL--Gulf	-0.56	-0.56
Corn	NE--Gulf	-0.79	-0.79
Soybean	IA--Gulf	-1.27	-1.22
HRW	KS--Gulf	-1.45	-1.42
HRS	ND--Portland	-1.66	-1.58

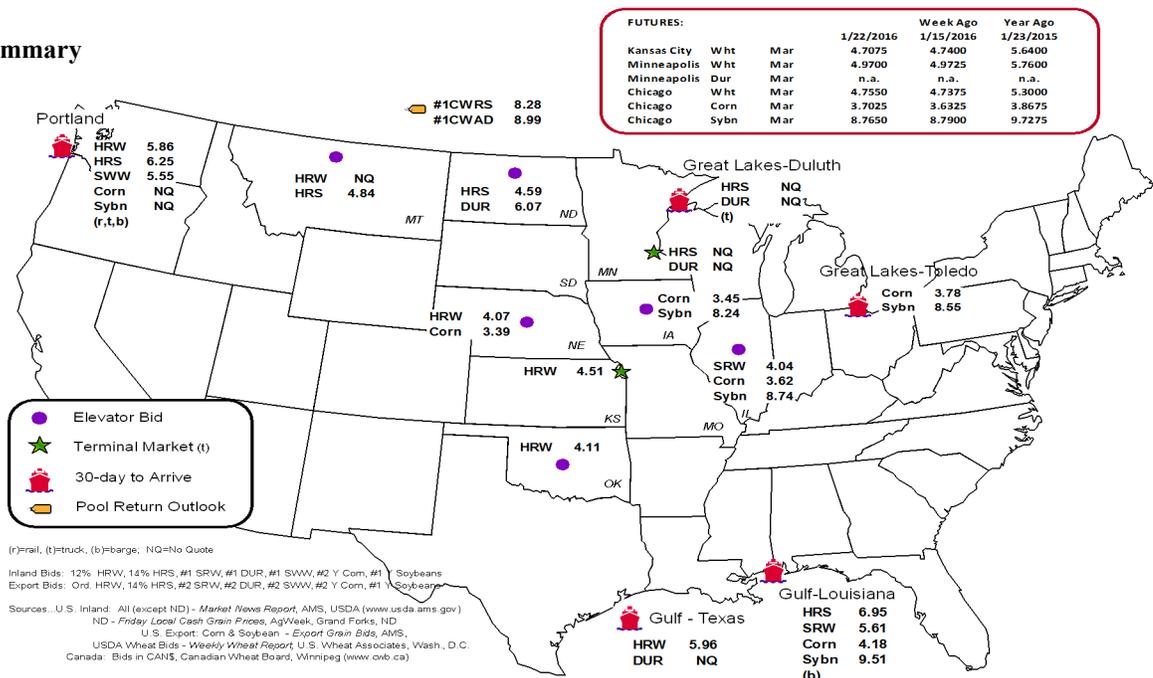
Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

n/a: quotes are not available due to the holiday

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			
1/20/2016 ^p	410	1,840	4,332	798	7,380	1/16/2016	1,417
1/13/2016 ^r	508	1,174	5,393	724	7,799	1/9/2016	1,851
2016 YTD ^r	1,277	4,091	15,336	2,016	22,720	2016 YTD	4,692
2015 YTD ^r	3,233	3,239	14,510	3,453	24,435	2015 YTD	4,071
2016 YTD as % of 2015 YTD	39	126	106	58	93	% change YTD	115
Last 4 weeks as % of 2015 ²	36	122	103	56	90	Last 4wks % 2015	127
Last 4 weeks as % of 4-year avg. ²	45	133	104	81	96	Last 4wks % 4 yr	111
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2015 and prior 4-year average.

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

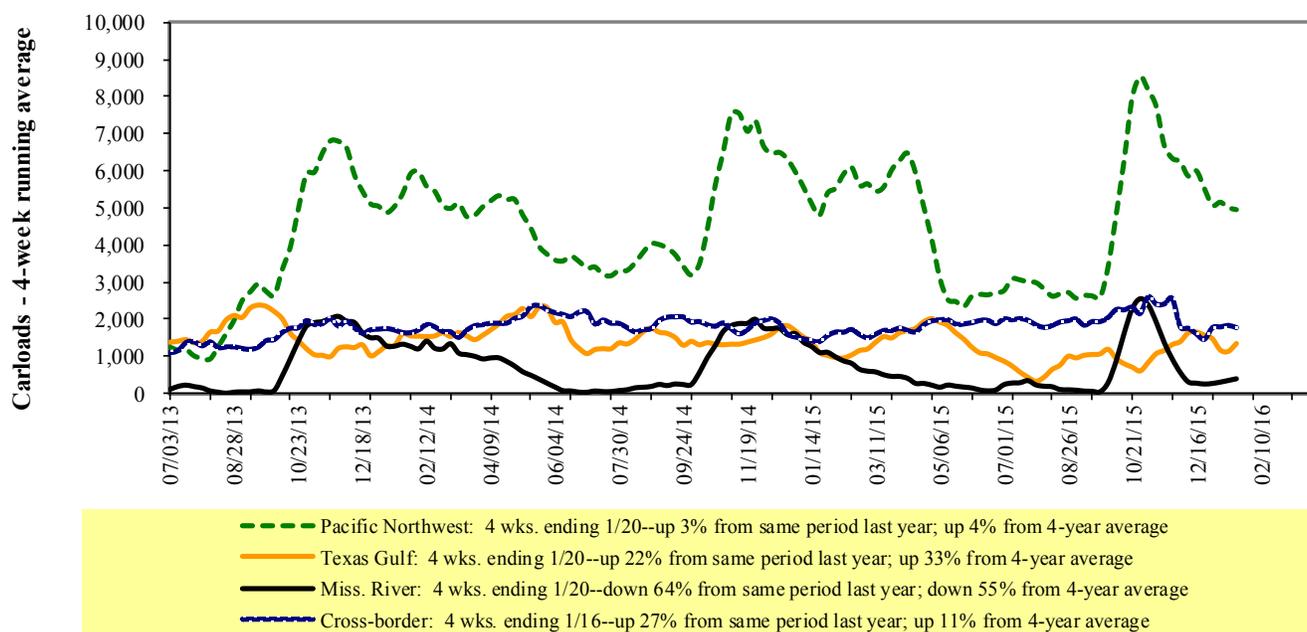
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

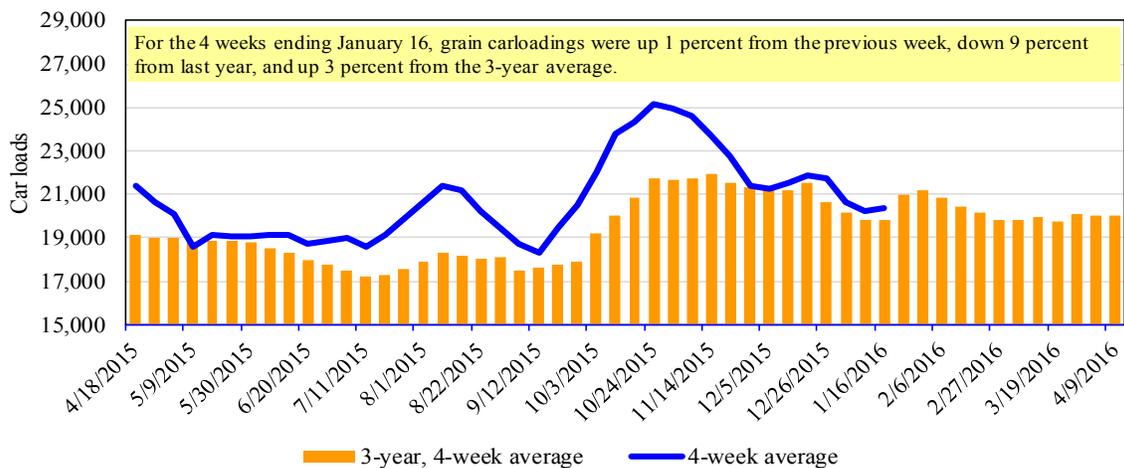
Class I Rail Carrier Grain Car Bulletin (grain carloads originated)

For the week ending:	East		West			U.S. total	Canada		
	1/16/2016	CSXT	NS	BNSF	KCS		UP	CN	CP
This week		2,167	2,829	11,760	1,239	5,398	23,393	3,240	4,013
This week last year		2,665	3,306	11,796	1,011	6,284	25,062	3,933	4,569
2016 YTD		4,337	5,702	22,388	1,993	10,134	44,554	6,851	8,397
2015 YTD		5,353	6,944	21,153	1,803	11,725	46,978	8,371	9,030
2016 YTD as % of 2015 YTD		81	82	106	111	86	95	82	93
Last 4 weeks as % of 2015*		81	81	103	94	80	91	72	83
Last 4 weeks as % of 3-yr avg.**		98	87	114	105	94	103	76	79
Total 2015		104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

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

**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

For the week ending:		<u>Delivery period</u>							
1/21/2016		Feb-16	Feb-15	Mar-16	Mar-15	Apr-16	Apr-15	May-16	May-15
BNSF ³	COT grain units	no bids	no offer	no bids	no offer	no bids	18	no bids	18
	COT grain single-car ⁵	0	no offer	0	1..55	no bids	0..51	22	0..29
UP ⁴	GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
	GCAS/Region 2	no bids	no offer	no bids	no offer	no bids	no offer	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.

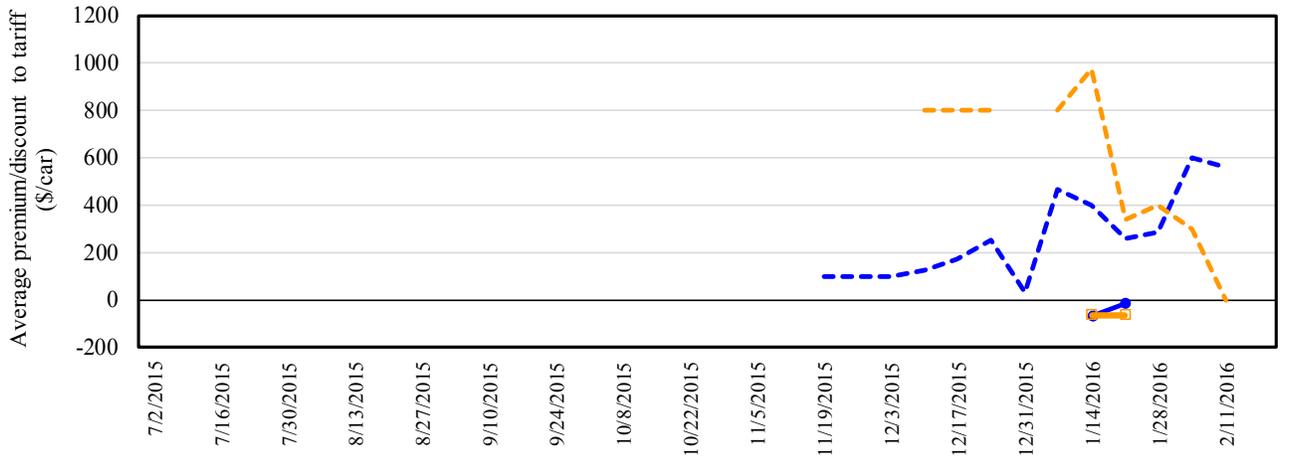
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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 February 2016, Secondary Market



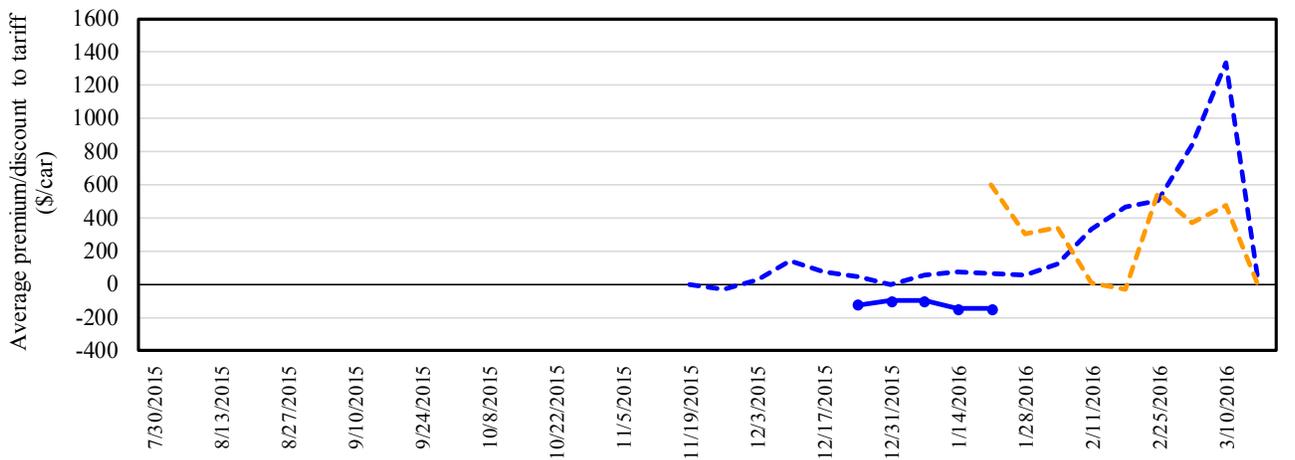
1/21/2016	BNSF	UP
Non-Shuttle	-\$25	-\$100
Shuttle	\$42	-\$67

Shuttle (solid blue line with circles)
 Shuttle prior 3-yr avg. (same week) (dashed blue line)
 Non-Shuttle (dashed orange line with squares)
 Non-Shuttle prior 3-yr avg. (same week) (dashed orange line)

Average Non-shuttle bids/offers are unchanged this week, and are at the peak.
 Average Shuttle bids/offers rose \$55 this week and are at 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 March 2016, Secondary Market



1/21/2016	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-\$150

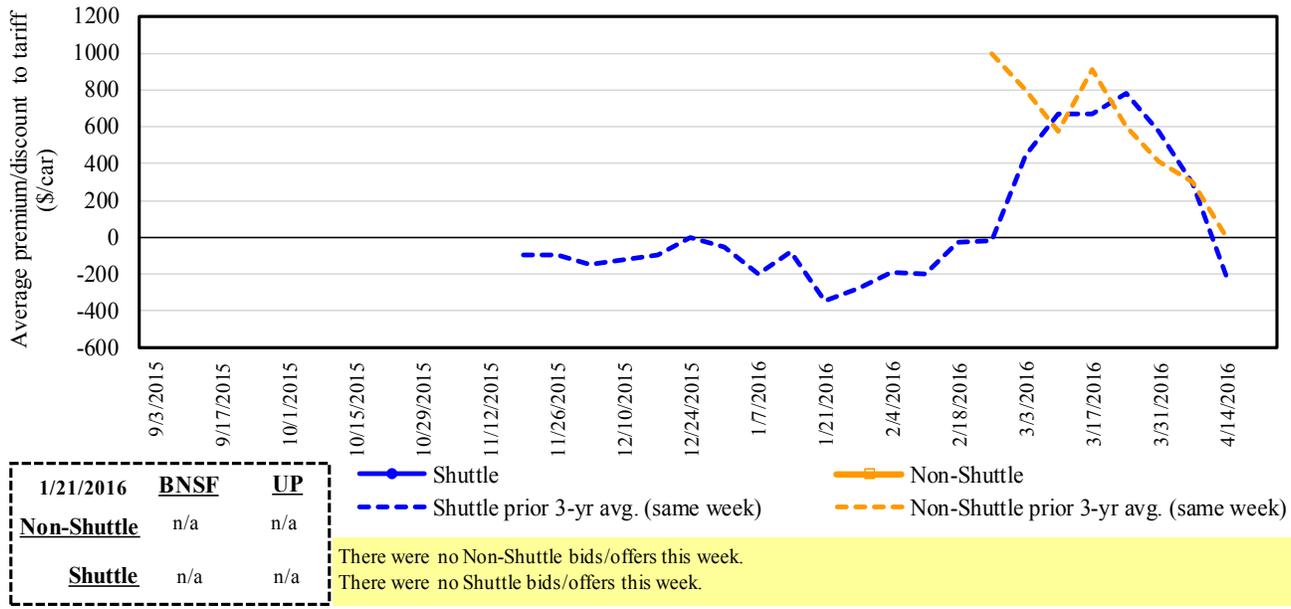
Shuttle (solid blue line with circles)
 Shuttle prior 3-yr avg. (same week) (dashed blue line)
 Non-Shuttle (dashed orange line with squares)
 Non-Shuttle prior 3-yr avg. (same week) (dashed orange line)

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers are unchanged this week and are \$50 below the peak.

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

Figure 6

Bids/Offers for Railcars to be Delivered in April 2016, Secondary Market



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

Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending:		Delivery period					
		Feb-16	Mar-16	Apr-16	May-16	Jun-16	Jul-16
Non-shuttle	BNSF-GF	(25)	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(100)	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	(100)	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	42	n/a	n/a	n/a	n/a	n/a
	Change from last week	105	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(67)	(150)	n/a	n/a	n/a	n/a
	Change from last week	4	0	n/a	n/a	n/a	n/a
	Change from same week 2015	233	50	n/a	n/a	n/a	n/a

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

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from James B. Joiner Co., Tradewest Brokerage Co.

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

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
1/1/2016						metric ton	bushel ²	
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$40	\$36.20	\$0.99	3	
	Grand Forks, ND	Duluth-Superior, MN	\$3,563	\$0	\$35.38	\$0.96	-3	
	Wichita, KS	Los Angeles, CA	\$6,950	\$0	\$69.02	\$1.88	4	
	Wichita, KS	New Orleans, LA	\$4,243	\$71	\$42.84	\$1.17	0	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	\$0	\$64.41	\$1.75	5	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$78	\$45.57	\$1.24	0	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$109	\$47.85	\$1.30	-2	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$80	\$37.35	\$0.95	3	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	2	
	Des Moines, IA	Davenport, IA	\$2,168	\$17	\$21.70	\$0.55	-2	
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$49.69	\$1.26	-1	
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	1	
Soybeans	Des Moines, IA	Little Rock, AR	\$3,444	\$50	\$34.70	\$0.88	0	
	Des Moines, IA	Los Angeles, CA	\$5,052	\$146	\$51.62	\$1.31	-4	
	Minneapolis, MN	New Orleans, LA	\$3,724	\$45	\$37.42	\$1.02	-10	
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	2	
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	3	
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	0	
	Champaign-Urbana, IL	New Orleans, LA	\$4,395	\$80	\$44.44	\$1.21	4	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	1	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$0	\$38.92	\$1.06	7	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	8	
	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	-9	
	Northwest KS	Portland, OR	\$5,478	\$128	\$55.67	\$1.52	-3	
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	-10	
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	-9	
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$80	\$35.37	\$0.90	3	
	Lincoln, NE	Galveston-Houston, TX	\$3,600	\$0	\$35.75	\$0.91	-5	
	Des Moines, IA	Amarillo, TX	\$3,795	\$63	\$38.31	\$0.97	-2	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	-10	
	Council Bluffs, IA	Stockton, CA	\$4,640	\$0	\$46.08	\$1.17	-6	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	\$0	\$54.52	\$1.48	-9
Minneapolis, MN		Portland, OR	\$5,510	\$0	\$54.72	\$1.49	-9	
Fargo, ND		Tacoma, WA	\$5,380	\$0	\$53.43	\$1.45	-8	
Council Bluffs, IA		New Orleans, LA	\$4,425	\$93	\$44.86	\$1.22	-6	
Toledo, OH		Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	3	
Grand Island, NE		Portland, OR	\$5,360	\$131	\$54.53	\$1.48	-6	

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

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel surcharge per car ²	Fuel surcharge		Percent change Y/Y ⁴
					Tariff plus surcharge per: metric ton ³	bushe ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,514	\$56	\$67.12	\$1.82	-7
	KS	Guadalajara, JA	\$6,995	\$116	\$72.66	\$1.98	-5
	TX	Salinas Victoria, NL	\$4,142	\$24	\$42.57	\$1.16	2
Corn	IA	Guadalajara, JA	\$8,397	\$111	\$86.93	\$2.21	-4
	SD	Celaya, GJ	\$7,840	\$0	\$80.11	\$2.03	-5
	NE	Queretaro, QA	\$7,879	\$49	\$81.01	\$2.06	-3
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	3
	MO	Tlalnepantla, EM	\$7,238	\$46	\$74.43	\$1.89	-3
	SD	Torreon, CU	\$7,240	\$0	\$73.98	\$1.88	0
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$112	\$89.55	\$2.43	2
	NE	Guadalajara, JA	\$9,142	\$118	\$94.61	\$2.57	0
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	0
	KS	Torreon, CU	\$7,439	\$85	\$76.88	\$2.09	0
Sorghum	NE	Celaya, GJ	\$7,404	\$104	\$76.70	\$1.95	-4
	KS	Queretaro, QA	\$7,563	\$70	\$77.98	\$1.98	5
	NE	Salinas Victoria, NL	\$6,168	\$56	\$63.59	\$1.61	5
	NE	Torreon, CU	\$6,827	\$82	\$70.60	\$1.79	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.

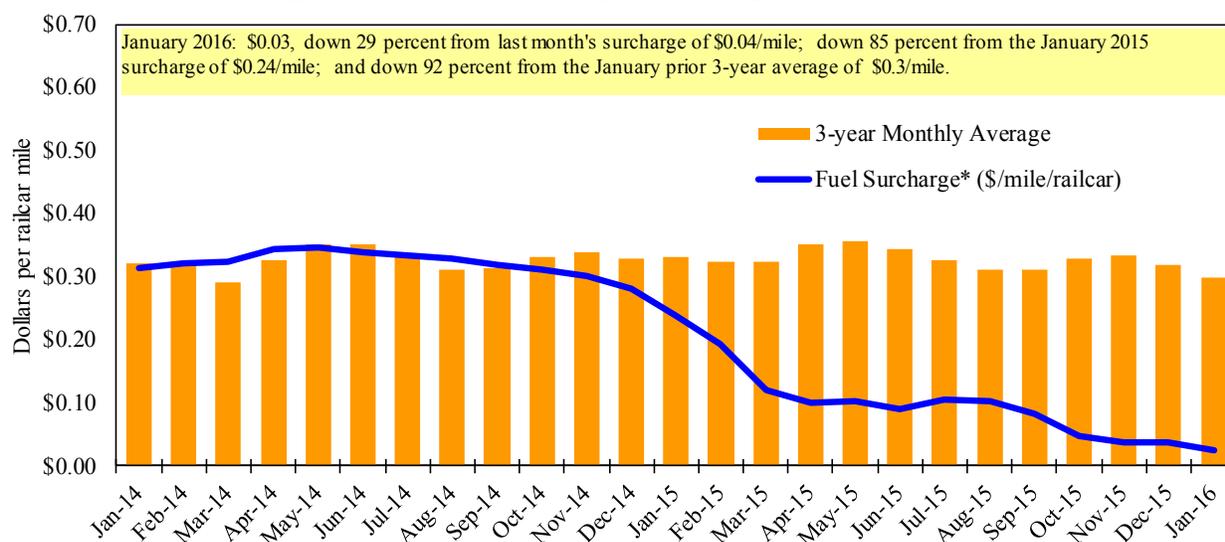
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

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

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted 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.

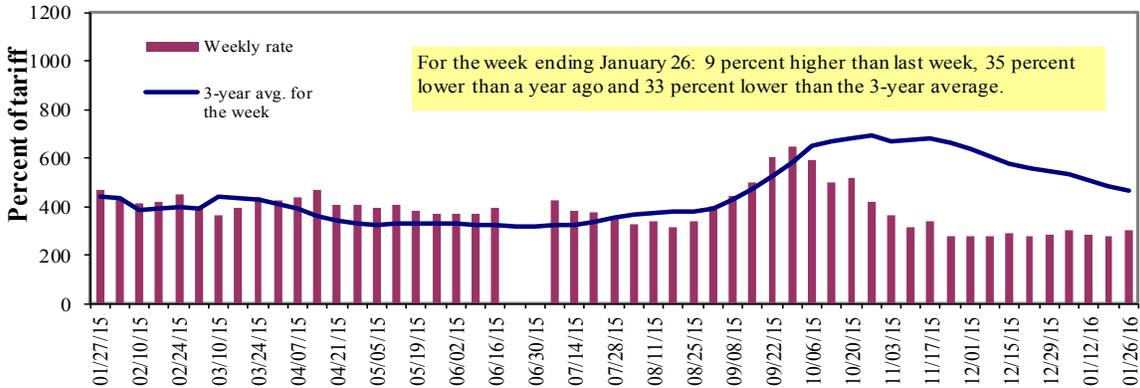
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.ksis.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	1/26/2016	-	-	305	198	203	205	170
	1/19/2016	-	-	280	188	205	205	163
\$/ton	1/26/2016	-	-	14.15	7.90	9.52	8.28	5.34
	1/19/2016	-	-	12.99	7.50	9.61	8.28	5.12
Current week % change from the same week:								
	Last year	-	-	-35	-46	-46	-45	-40
	3-year avg. ²	-	-	-33	-45	-43	-43	-32
Rate¹	February	-	-	278	190	198	198	165
	April	338	278	270	190	200	200	165

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; missing data due to winter closure or flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

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

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

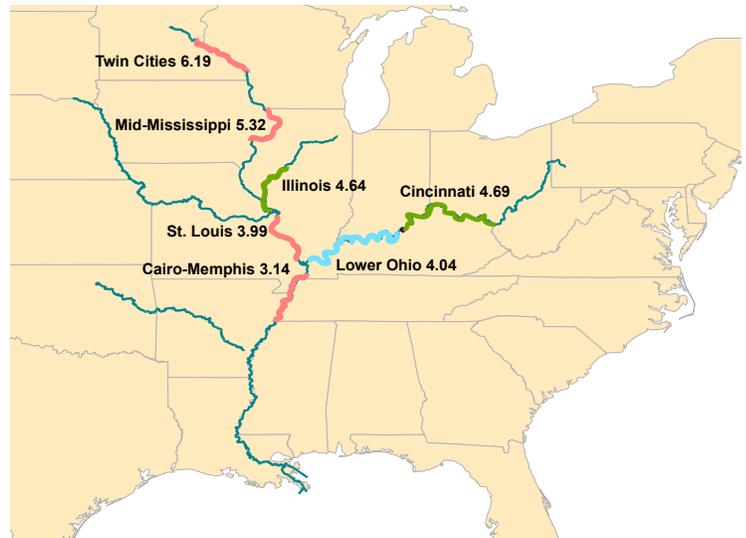
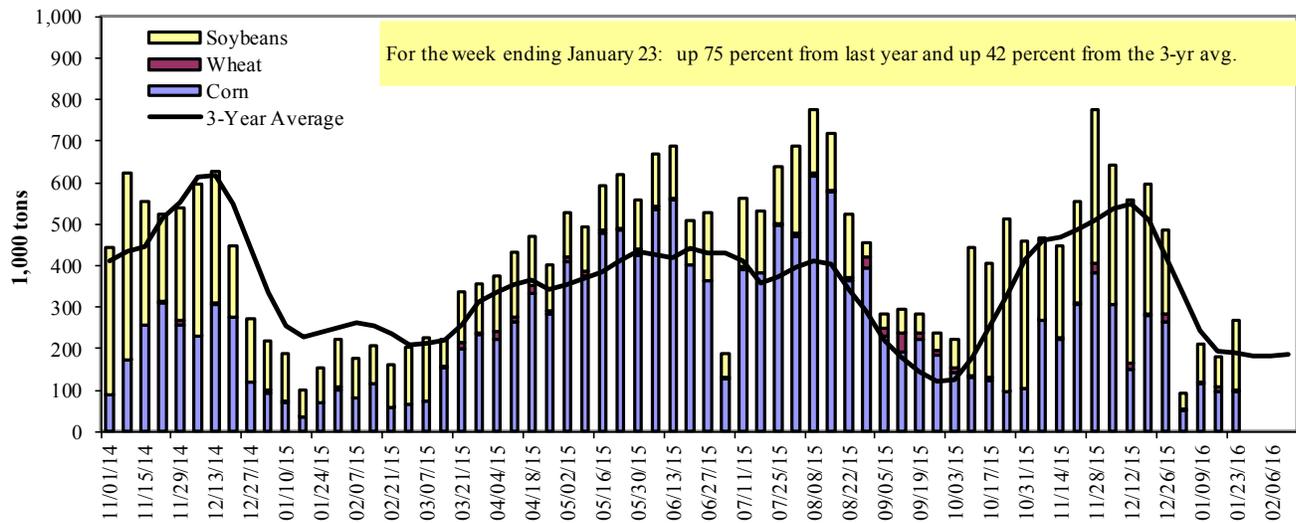


Figure 10

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



¹ The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 1/23/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	108	2	210	0	319
Granite City, IL (L27)	97	2	168	0	267
Illinois River (L8)	65	2	136	0	203
Ohio River (L52)	148	2	160	2	312
Arkansas River (L1)	0	6	22	0	28
Weekly total - 2016	245	9	350	2	606
Weekly total - 2015	233	13	315	0	561
2016 YTD ¹	739	36	852	2	1,629
2015 YTD	692	46	868	15	1,620
2016 as % of 2015 YTD	107	79	98	13	101
Last 4 weeks as % of 2015 ²	102	64	93	13	95
Total 2015 (revised 1/14/2016)	19,215	1,686	14,191	359	35,451

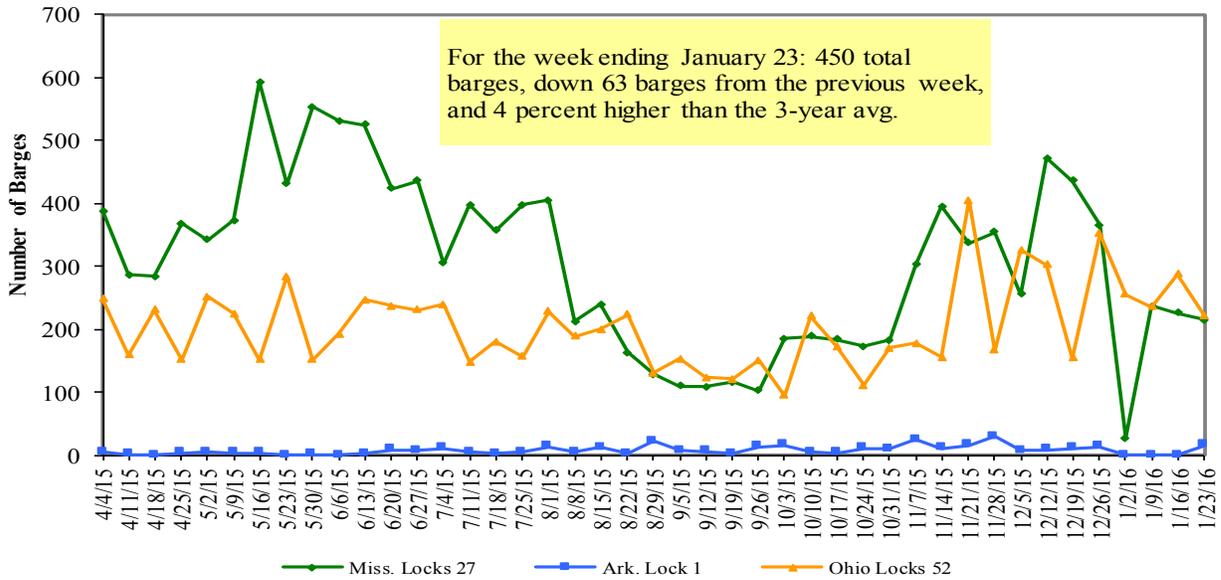
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

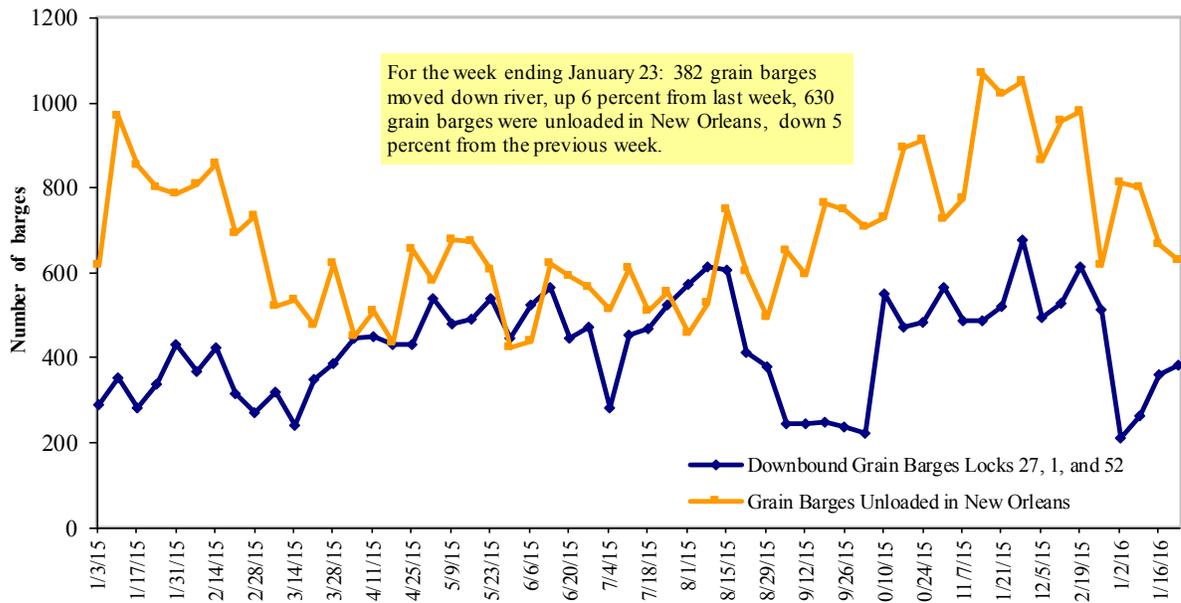
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 1/25/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.140	-0.034	-0.827
	New England	2.240	-0.037	-0.778
	Central Atlantic	2.264	-0.041	-0.814
	Lower Atlantic	2.025	-0.029	-0.845
II	Midwest ²	1.987	-0.036	-0.817
III	Gulf Coast ³	1.957	-0.057	-0.829
IV	Rocky Mountain	2.015	-0.063	-0.797
V	West Coast	2.325	-0.034	-0.617
	West Coast less California	2.160	-0.038	-0.603
	California	2.459	-0.030	-0.631
Total	U.S.	2.071	-0.041	-0.795

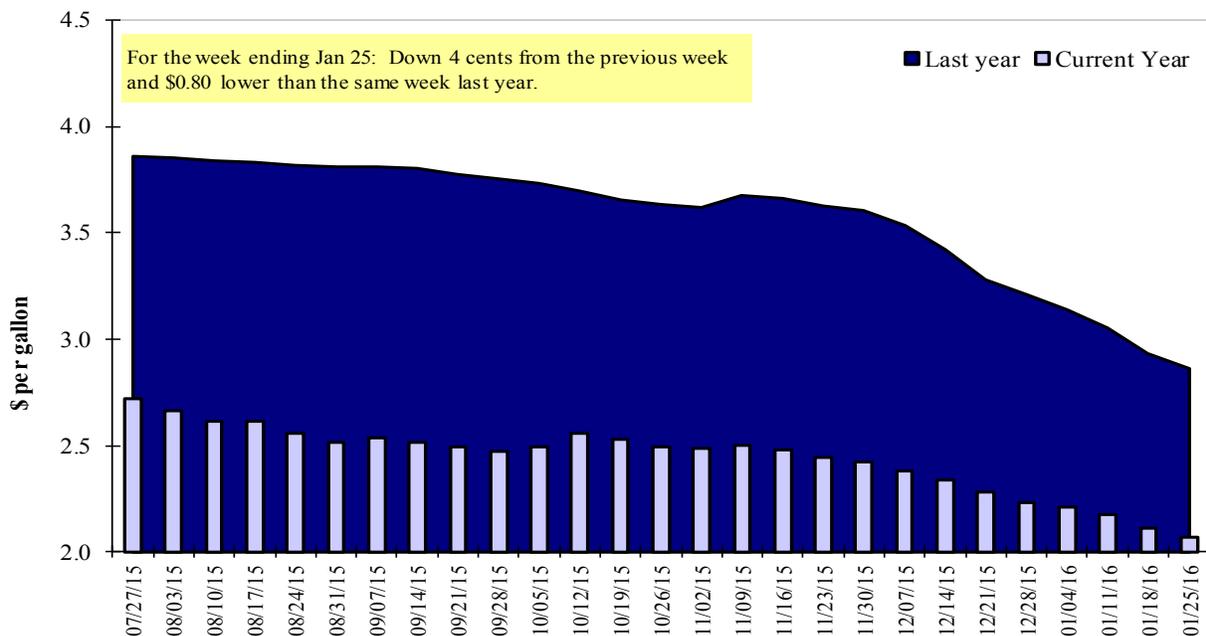
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
1/14/2016	1,158	634	1,417	932	81	4,222	11,669	10,102	25,993
This week year ago	1,485	797	1,817	929	87	5,116	16,569	11,313	32,998
Cumulative exports-marketing year²									
2015/16 YTD	3,460	2,172	3,875	2,146	542	12,194	10,611	30,037	52,842
2014/15 YTD	4,411	2,395	4,571	2,424	476	14,277	13,015	32,880	60,172
YTD 2015/16 as % of 2014/15	78	91	85	89	114	85	82	91	88
Last 4 wks as % of same period 2014/15	82	78	79	104	82	85	68	97	80
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for corn and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

Top 5 Importers¹ of U.S. Corn

For the week ending 1/14/2016	Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2011-2013
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	3,485	6,154	(43)	10,079
Mexico	8,553	7,064	21	8,145
Korea	596	1,488	(60)	2,965
Colombia	2,135	2,287	(7)	3,461
Taiwan	398	750	(47)	1,238
Top 5 Importers	15,167	17,742	(15)	25,887
Total US corn export sales	22,279	30,346	(27)	34,445
% of Projected	52%	64%		
Change from prior week	1,158	2,185		
Top 5 importers' share of U.S. corn export sales	68%	58%		75%
USDA forecast, January 2016	43,257	47,430	(9)	
Corn Use for Ethanol USDA forecast, January 2016	132,080	132,309	(0)	

(n) indicates negative number.

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

² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>

³ FAS 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 1/14/2016	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2011-13
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	24,892	27,765	(10)	24,211
Mexico	1,976	2,298	(14)	2,971
Indonesia	736	1,077	(32)	1,895
Japan	1,209	1,259	(4)	1,750
Taiwan	718	1,091	(34)	1,055
Top 5 importers	29,530	33,489	(12)	31,882
Total US soybean export sales	40,139	44,193	(9)	39,169
% of Projected	87%	88%		
Change from prior week	909	14		
Top 5 importers' share of U.S. soybean export sales	74%	76%		81%
USDA forecast, January 2016	46,049	50,218	(8)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>³FAS 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 1/14/2016	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2012-2014
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,794	2,585	(31)	3,113
Mexico	1,748	2,198	(20)	2,807
Nigeria	1,324	1,819	(27)	2,512
Philippines	1,776	1,917	(7)	2,105
Brazil	369	1,461	(75)	2,091
Korea	997	1,140	(13)	1,273
Taiwan	1,794	2,585	(31)	1,007
Indonesia	291	399	(27)	751
Colombia	516	526	(2)	662
Thailand	388	372		618
Top 10 importers	10,608	14,630	(27)	16,939
Total US wheat export sales	16,416	19,393	(15)	26,361
% of Projected	75%	83%		
Change from prior week	337	458		
Top 10 importers' share of U.S. wheat export sales	65%	75%		64%
USDA forecast, January 2016	21,798	23,270	(6)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>³FAS 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 01/21/16	Previous Week ¹	Current Week as % of Previous	2016 YTD ¹	2015 YTD ¹	2016 YTD as % of 2015 YTD	Last 4-weeks as % of		Total ¹ 2015
							2015	3-yr. avg.	
Pacific Northwest									
Wheat	109	228	48	633	577	110	123	122	10,943
Corn	121	59	205	238	296	81	60	74	7,232
Soybeans	317	354	90	960	1,090	88	92	106	11,814
Total	547	641	85	1,832	1,963	93	96	107	29,990
Mississippi Gulf									
Wheat	67	52	130	155	158	99	67	53	4,504
Corn	403	350	115	1,132	1,472	77	76	102	26,692
Soybeans	747	870	86	2,540	3,245	78	91	106	29,653
Total	1,218	1,271	96	3,827	4,874	79	86	102	60,849
Texas Gulf									
Wheat	0	55	0	79	90	87	83	37	3,724
Corn	0	32	0	32	32	99	99	102	656
Soybeans	0	63	0	63	148	42	30	40	800
Total	0	149	0	174	271	64	55	42	5,179
Interior									
Wheat	22	24	91	76	61	125	99	93	1,386
Corn	65	130	50	297	303	98	108	126	6,181
Soybeans	77	81	95	215	312	69	77	71	3,612
Total	164	235	70	588	677	87	104	81	11,179
Great Lakes									
Wheat	0	0	n/a	0	0	n/a	n/a	0	993
Corn	0	0	n/a	0	0	n/a	n/a	0	491
Soybeans	0	0	n/a	0	0	n/a	n/a	0	684
Total	0	0	n/a	0	0	n/a	n/a	0	2,168
Atlantic									
Wheat	0	1	n/a	30	1	n/a	2,887	356	462
Corn	0	0	n/a	0	0	n/a	n/a	0	277
Soybeans	118	55	216	219	285	77	90	112	2,026
Total	118	56	213	248	286	87	99	120	2,765
U.S. total from ports²									
Wheat	198	359	55	974	888	110	108	90	22,011
Corn	589	570	103	1,699	2,104	81	77	101	41,529
Soybeans	1,260	1,422	89	3,996	5,079	79	87	102	48,589
Total	2,047	2,352	87	6,669	8,070	83	87	100	112,129

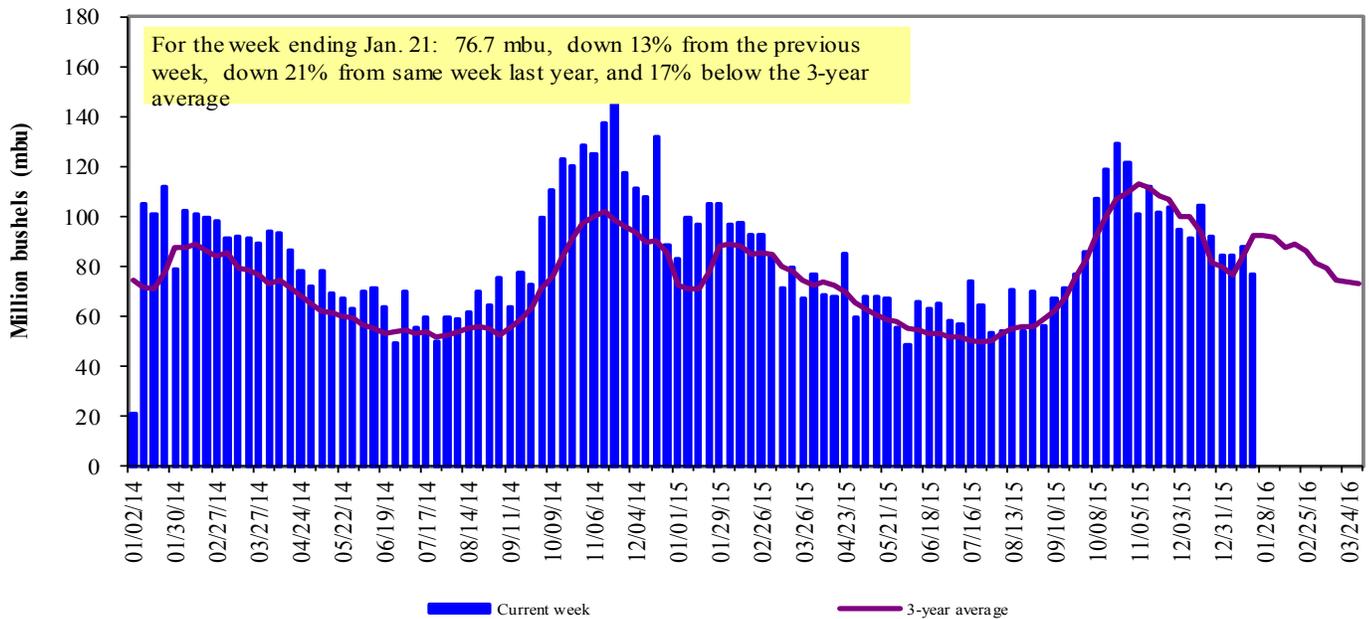
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2015.

Figure 14

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

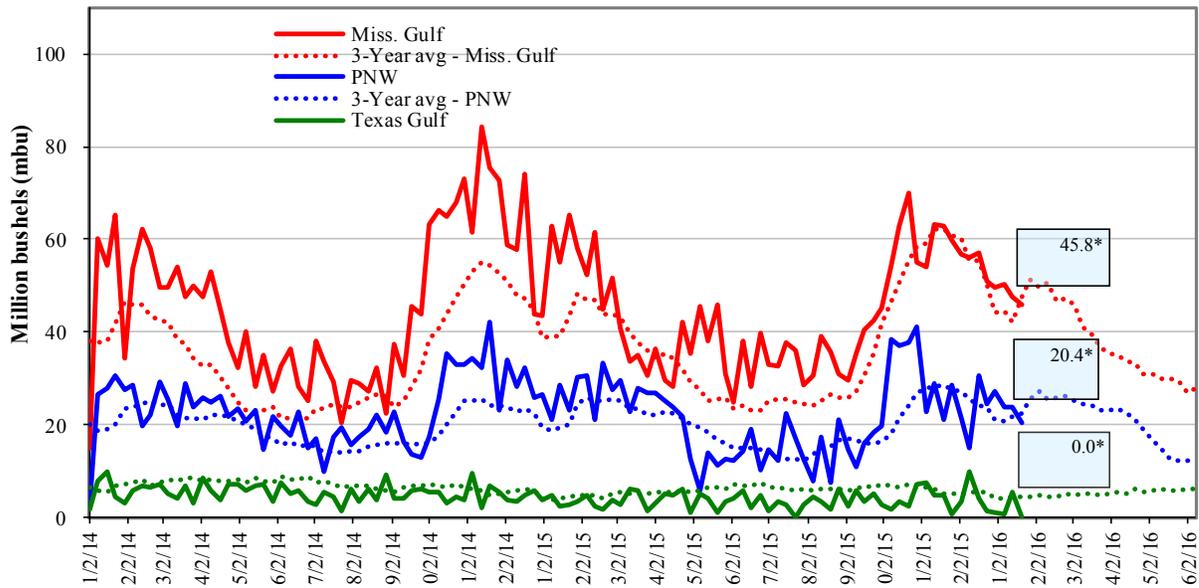


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

Note: 3-year average consists of 4-week running average

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); *mbu, this week.

January 21: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 4	down 100	down 14	down 14
Last year (same week)	down 30	down 100	down 33	down 12
3-yr avg. (4-wk mov. avg.)	down 4	down 100	down 12	down 9

Ocean Transportation

Table 17

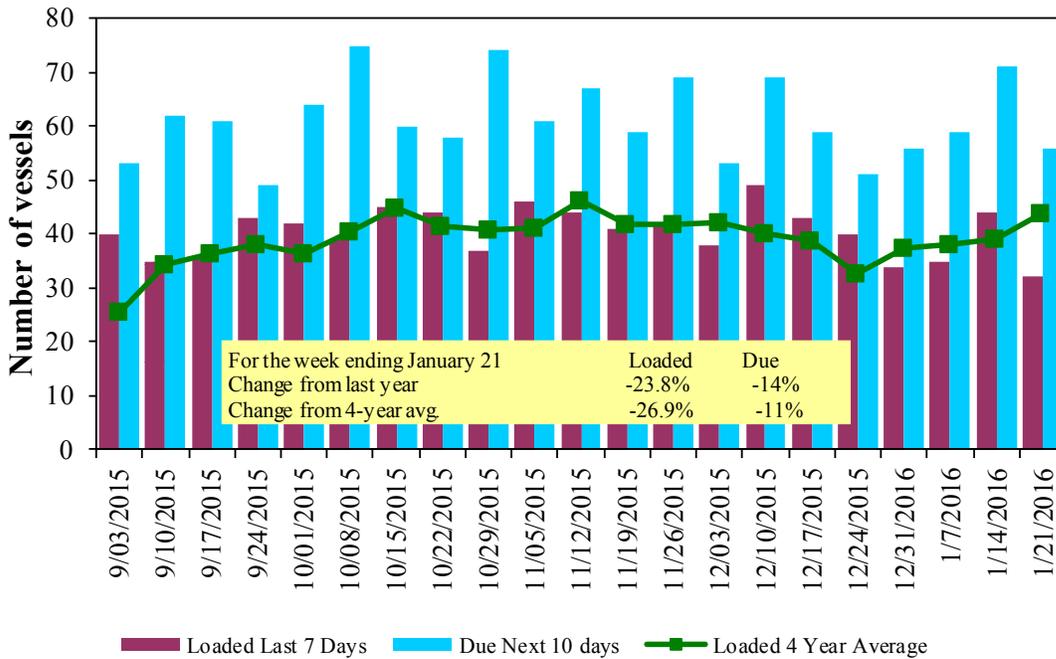
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
1/21/2016	52	32	56	18	n/a
1/14/2016	45	44	71	13	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

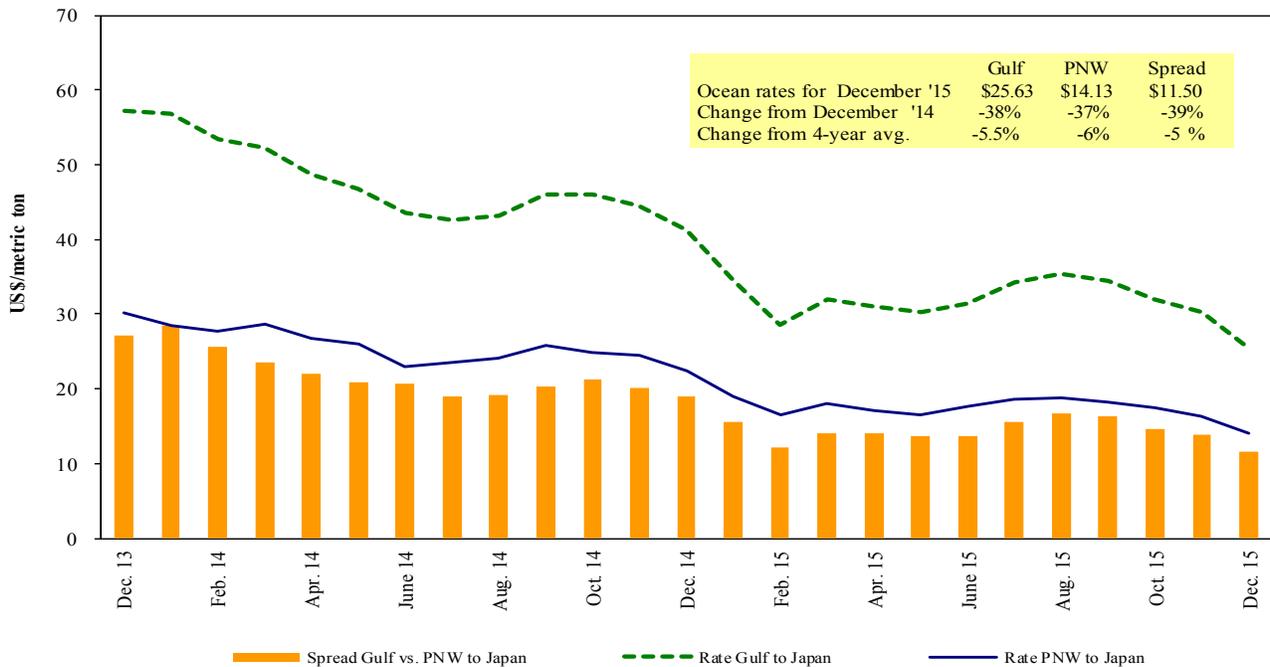


Source: Transportation & Marketing Programs/AMS/USDA

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 1/23/2016

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 10/20	60,000	21.50
Argentina	Morocco	Maize	Jan 9/14	25,000	16.75
U.S. Gulf	China	Heavy Grain	Jan 6/16	54,000	24.00
Argentina	Casablanca	Heavy Grain	Jan 11/16	25,000	17.00
PNW	Bangladesh	Wheat	Dec 7/16	20,040	33.93
Brazil	Japan	Grain	Dec 16/31	60,000	19.75
EC S America	China	Heavy Grain	Feb/Mar 16	60,000	18.50
France	Algeria	Wheat	Jan1/6	30,000	11.00
U.S Gulf	Mombasa	Sorghum	Jan 4/14	19,100	31.60
U.S Gulf	Mombasa	Sorghum	Jan 4/15	45,570	22.51
U.S. Gulf	China	Heavy Grain	Jan 15/25	54,000	22.50
Pacific NW	Djibuti	Wheat	Jan 15/25	46,150	38.25
Argentina	Vietnam	Heavy Grain	Jan 25/Feb 5	50,000	19.00
Brazil	Iran	Grain	Jan 25/Feb 5	55,000	17.90
Argentina	Capetown	Corn	Jan 25/30	40,000	12.50
U.S. Gulf	China	Heavy Grain	Jan 28/Feb 7	54,000	23.10
Brazil	China	Heavy Grain	Feb 15/20	60,000	12.60
Paranagua	China	Heavy Grain	Feb 1/10	60,000	15.00

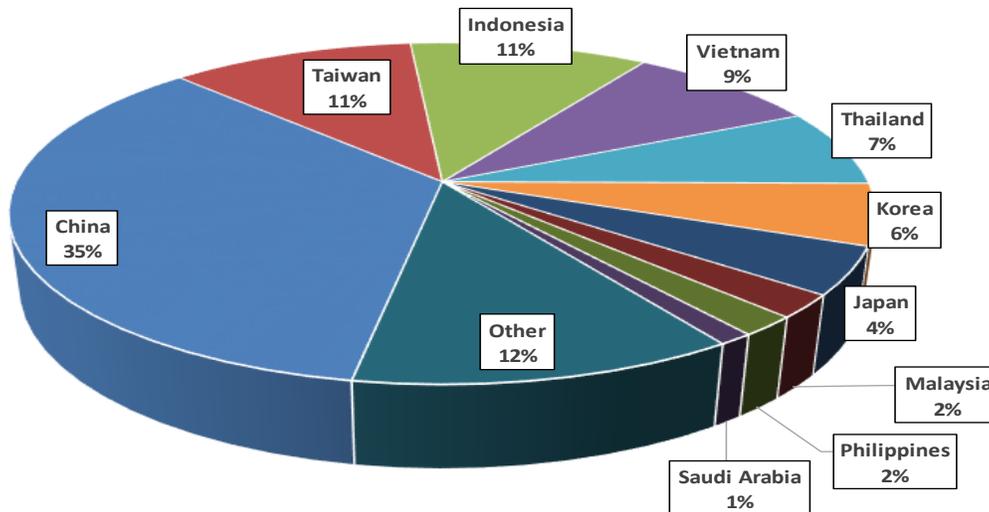
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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

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

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January-November 2015

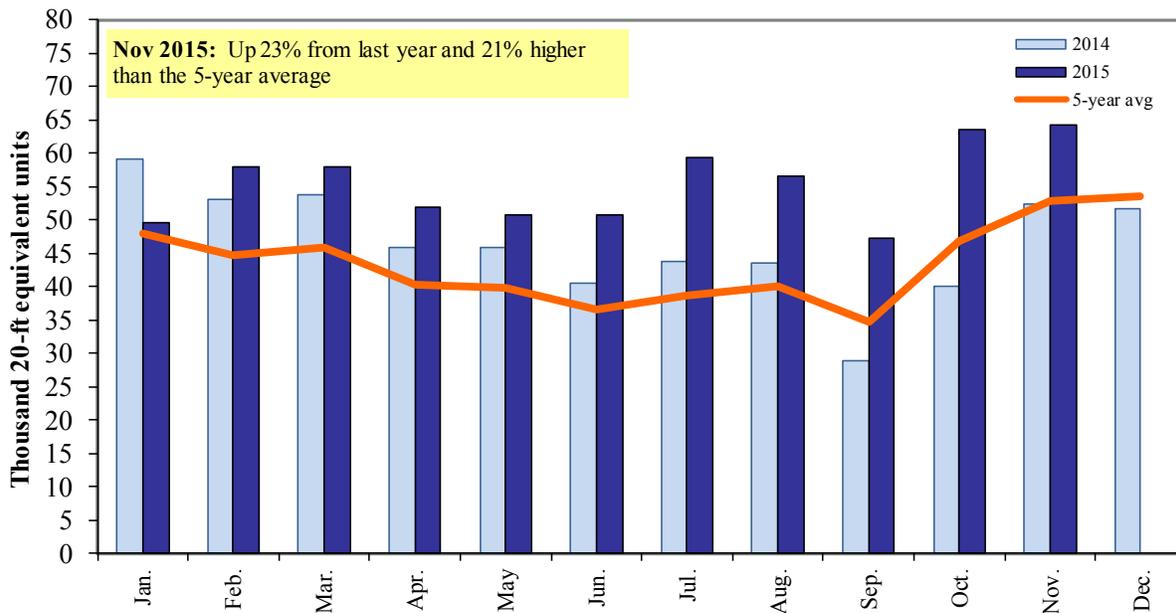


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

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