



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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Mid-Willamette Valley Intermodal Center Opens in Oregon

On December 16, the [Mid-Willamette Valley Intermodal Center](#) opened in Millerburg, OR, where it will primarily serve the local agricultural community. Brought to the Center by trucks, cargo in international containers can then be transferred to Union Pacific rail cars arrived from the Midwest, as well as from Denver, CO, and Salt Lake City, UT. The rail cars will then head to marine terminals in Seattle and Tacoma, WA. The \$35.5 million, 64-acre Center was one of four projects to receive funding from the Oregon Department of Transportation's Connect Oregon program. The Center will reduce greenhouse gas emissions by substituting rail use for truck use. The Center will also give farmers alternative options for transporting goods to market, as well as reduce shipping costs, while boosting the local economy.

DOT Offers \$1.5 Billion in RAISE Grants for Transportation Projects

The U.S. Department of Transportation (DOT) recently announced \$1.5 billion in grant funding available through the Rebuilding American Infrastructure with Sustainability and Equity (RAISE) discretionary grant program for 2023. With lower eligibility requirements than other DOT grants, RAISE grants help complete critical freight transportation infrastructure projects at the State and local levels. Some key recipients of 2022 RAISE grants are as follows: North Dakota/Minnesota Community Bridge Connectivity Project, Fargo, ND (\$1.5 million); New Intermodal Facility, Port of Wilmington, NC (\$18+ million); Maritime Support Facility Access/Terminal Island Rail System, Port of Los Angeles, CA (\$20 million); and SH-37 BNSF Grade Separation and Multimodal Improvements, Moore, OK (\$10 million). (See the complete list of 2022 RAISE grant recipients [here](#).) The notice of funding opportunity for 2023 grants is [available here](#), and applications are due by February 28, 2023.

Two Midwest Lock and Dam Locations Have Major Closures Through March

On January 1, the main chambers of both the Melvin Price Lock and Dam (near St. Louis, MO) and Lock and Dam 27 (near Granite City, IL) are [closed for maintenance](#) and scheduled to remain closed through March 31. (However, icy conditions may slow the maintenance work at both Lock and Dam locations.) At both locations, all tows transiting the locks must use the 600-foot auxiliary chamber—a procedural change that significantly slows processing time, increasing tow delays. As of January 17, a 45-hour delay (9 tows) was reported at the Melvin Price Lock and Dam and a 38-hour delay (28 tows) at Lock and Dam 27. In 2022, 20.8 million tons of grain moved through Lock and Dam 27. In the first 2 weeks of 2023, 354,000 of grain moved through Lock and Dam 27—down 42 percent from last year and down 52 percent from the 3-year average ([GTR figure 9](#)).

Diesel Prices Drop For Second Week

Diesel prices dropped for a second week in the new year. For the week ending January 16, the U.S. average [diesel fuel price](#) decreased 2.5 cents from the previous week to \$4.524 per gallon, 79.9 cents above the same week last year. Diesel prices dropped in every region this week except for the Gulf Coast (1 cent increase) and the Rocky Mountain (3.2 cent increase) regions. In the Midwest, the average diesel price dropped by 1.6 cents to \$4.374 per gallon, but is still 77.1 cents above the same price last year.

Snapshots by Sector

Export Sales

For the week ending January 5, [unshipped balances](#) of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 30.56 million metric tons (mmt), down 26 percent from the same time last year and down 4 percent from last week. Net [corn export sales](#) for MY 2022/23 were 0.256 mmt, down 20 percent from last week. Net [soybean export sales](#) were 0.717 mmt, down 1 percent from last week. Net weekly [wheat export sales](#) were 0.091 mmt, up 92 percent from last week.

Rail

U.S. Class I railroads originated 22,089 [grain carloads](#) during the week ending January 7. This was a 20-percent increase from the previous week, 1 percent more than last year, and 4 percent fewer than the 3-year average.

Average January shuttle [secondary railcar bids/offers](#) (per car) were \$525 above tariff for the week ending January 12. This was \$481 less than last week and \$1,063 lower than this week last year.

Barge

For the week ending January 14, [barged grain movements](#) totaled 546,650 tons. This was 54 percent higher than the previous week and 11 percent higher than the same period last year.

For the week ending January 14, 388 grain barges [moved down river](#)—158 more than last week. There were 871 grain barges [unloaded](#) in the New Orleans region, 39 percent more than last week.

Ocean

For the week ending January 12, 31 [oceangoing grain vessels](#) were loaded in the Gulf—6 percent fewer than the same period last year. Within the next 10 days (starting January 13), 51 vessels were expected to be loaded—14 percent fewer than the same period last year.

As of January 12, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$52.25, 3 percent less than the previous week. The rate from the Pacific Northwest to Japan was \$28.25 per mt, 7 percent less than the previous week.

Feature Article/Calendar

An Update on Rail Issues for Grain

This past year has been exceptional for railroads and the Surface Transportation Board (STB). It included a potential national rail strike and extreme service issues, as well as STB activity on a potential Class I merger, emergency service orders, private railcar use, rail service issues, and, most recently, Union Pacific's (UP) use of embargoes to manage congestion. This article provides an update on rail service over the past year, discusses recent activity at STB, and highlights some possible issues on the horizon, which could impact grain transportation by rail.

A Review of Rail Service in 2022 and Early 2023

Rail service issues were a nearly constant challenge throughout 2022. Figure 1 shows the number of unfilled orders for empty grain cars in manifest service, which illustrates the progression of rail performance through the year. Service issues started early in 2022, even stretching back into late 2021. As concern grew over deteriorating rail service into March, STB held a hearing in April on urgent issues in freight rail service. Shippers and the Deputy Secretary of Agriculture described significant delays in railroads supplying empty cars, picking up loaded grain trains, and delivering grain trains to their destination. After the hearing, STB required U.S. Class I railroads to submit plans to improve their service, as well as weekly data to track their progress.

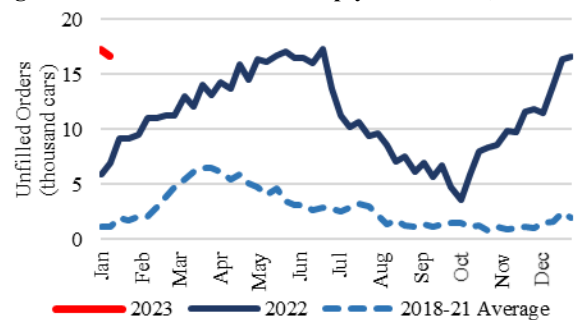
During spring, poor rail service stymied the flow of grain—reducing origin elevators' ability to buy grain from farmers and receivers' ability to have enough grain on-hand to feed their livestock and poultry. In one case in June, Foster Poultry Farms (Foster Farms) applied for an emergency service order from STB because unpredictable rail service undermined its ability to feed hundreds of thousands of cattle and millions of chickens. STB directed Union Pacific Railroad (UP) to deliver trains of corn to Foster Farms.

Toward the end of the summer, rail service did appear to improve some. Grain train speeds increased, origin dwell times for grain fell, and the number of unfilled empty car orders dropped significantly. Additionally, the new, weekly rail metrics that began with the April hearing have showed some improvement. For example, the percentage of manifest cars placed within 24 hours of the original estimated arrival (on-time arrivals) steadily increased throughout the year. Although service improved, output was still low: the number of grain cars originated by Class I railroads was 4 percent below the prior 3-year average from the beginning of July through mid-September.

More recently, despite the progress seen in some aspects of rail service, service for grain shippers still appeared problematic. Since the beginning of harvest, the number of unfilled orders for empty grain cars skyrocketed back to the high levels seen in spring (fig. 1). In fact, the number reached a new, all-time peak in the data reported on January 5, 2023. BNSF accounted for the majority of the increase in unfilled orders, but UP's unfilled orders have grown since harvest as well. Additionally, in December, Foster Farms submitted another request for an emergency service order from STB, based again on not receiving enough grain shipments from UP to feed its cattle and poultry. On December 30, STB directed UP to provide the service, but despite the order, UP still had delays in delivering the trains.

These issues have raised questions about whether the railroads are meeting their common carrier obligation.¹ Throughout the service crisis, UP's use of embargoes to manage congestion has grown substantially. Figure 2 (next page) shows the number of congestion/accumulation embargoes in effect each day between January 1, 2021 and January 13, 2023. On the one hand, embargoes and unfilled orders may prevent congestion from compounding, giving the railroads a chance to clear their tracks and terminals, and improve their other service metrics. On the other hand, improved train speeds and dwell times do little for shippers who are being denied service. The high levels of embargoes, the unfilled grain car orders, and the continued issues facing companies such as Foster Farms, all suggest there is more demand for rail service than the railroads are currently providing.

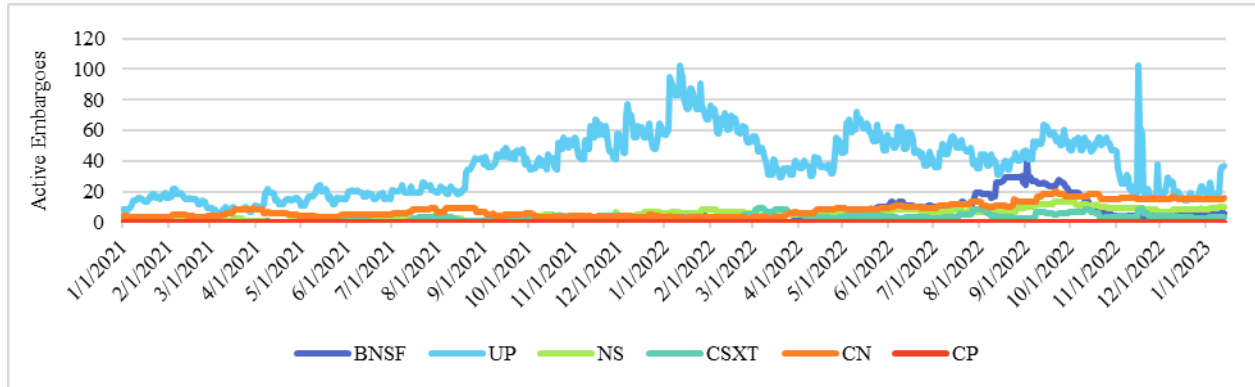
Figure 1: Unfilled Orders for Empty Grain Cars, 2018-23.



Source: USDA-AMS analysis Surface Transportation Board Rail Service Metrics.

¹ For additional background on this obligation, see [Railroads' Common Carrier Obligation: Its Legal and Economic Context](#) by Francis P. Mulvey and Michael F. McBride.

Figure 2: Class I Active Congestion Embargoes, January 1 2021 - January 13, 2023.



Source: USDA-AMS analysis RailInc, AAR Embargo System data, as of January 17, 2023.

On December 13-14, STB held an oversight hearing pertaining to UP’s use of embargoes, [citing](#) “a disturbing upward trend in their usage.” STB sought information on several parameters, including UP’s decision-making process for embargoes, explanations for the dramatic increase in their usage, how UP notifies shippers, and the extent to which UP considers shippers’ operational needs. Multiple agricultural companies and associations participated in the hearing. Following the hearing, on December 16, [UP indicated](#) it was “taking a hard look at our use of congestion-related embargoes” and “immediately pausing any additional embargoes under the pipeline inventory management program.” Figure 2 shows UP’s use of embargoes in December was well below their use earlier in the year, but it does not show a clear drop in their embargo use following the hearing. Instead, UP’s active embargoes have increased since the hearing.

Looking Ahead

On December 19, STB [finalized two rules](#) implementing two streamlined approaches for shippers and railroads to resolve rate disputes, worth up to \$4 million in relief over 2 years: a voluntary arbitration program and a procedure known as Final Offer Rate Review (FORR).² The voluntary arbitration program will begin only if all seven Class I carriers commit—by February 23, 2023—to participating for 5 years. If all Class I carriers commit, they will be exempt from the FORR procedure. The final rule establishing the arbitration program takes effect February 3, 2023, and the final rule establishing the FORR procedure takes effect March 6, 2023. [According to the STB Chair](#), “The two rules attempt to strike a balance between the competing interests of various stakeholders”—particularly, between shippers’ preference for FORR and the railroads’ preference for a voluntary arbitration program. Multiple railroads have challenged both proceedings in court and have asked STB to delay the 50-day window for when all seven Class I railroads must agree to participate.

STB was extremely active in 2022 and is slated to be busy again in 2023. There are several open proceedings, including multiple proposed rulemakings and the first potential Class I rail merger in over 20 years. According to a recent [U.S. Government Accountability Office report on precision-scheduled railroading](#), STB indicated it plans to issue a decision on reciprocal switching (an access provision where one railroad could use the facilities of another) in February 2023. STB is [targeting March 2023](#) for a decision on revisions to its regulations for service emergencies.³

The prognosis for service remains unclear. As noted earlier, some recent metrics—such as average origin dwell times for grain (which reached 47.1 hours for the week ending January 4, 54 percent above the 3-year average) and unfilled grain car orders in manifest service (which reached 17,300 cars for the same week, more than 5 times higher than the 3-year average)—were among the worst on record. Railroads have emphasized their commitment to hiring, and [some have recently stated an intention to shift](#) their focus to service and volume growth (as opposed to lower operating ratios). Although bids/offers for delivery of shuttle cars in January, February, and March have fallen in recent weeks ([GTR figs. 3, 4, and 5](#))—pointing to better alignment between car supply and demand (at least for shuttle service)—the aforementioned historically poor service metrics suggest major challenges could persist for the foreseeable future. PeterA.Caffarelli@usda.gov, Jesse.Gastelle@usda.gov

² Each is a procedure for shippers to challenge the reasonableness of railroad rates in smaller cases. They are similar in that they involve procedural constraints (as opposed to substantive limitations), have similar timeframes, and have the same monetary limits. They differ in a few key respects. Under FORR, STB would decide disputes, which would be public and set precedents on which to base future cases. In contrast, under the voluntary arbitration program, a group of three arbitrators would determine cases, and details from each arbitration case would be confidential and non-precedent-setting, though STB would publish quarterly reports.

³ In addition to these proposed rulemakings, STB is considering a petition from railroads to change its procedures for determining whether Class I carriers are revenue adequate and a petition from shippers for STB to adopt rules governing private railcar use by railroads. STB is also examining issues and data around first-mile/last-mile service.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Non-Shuttle	Shuttle		Gulf	Pacific
01/18/23	304	333	289	350	234	200
01/11/23	305	333	302	360	242	216

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); ocean = routes to Japan (\$/metric ton); n/a = not available due to holiday.

Source: USDA, Agricultural Marketing Service.

Table 2

Market Update: U.S. origins to export position price spreads (\$/bushel)

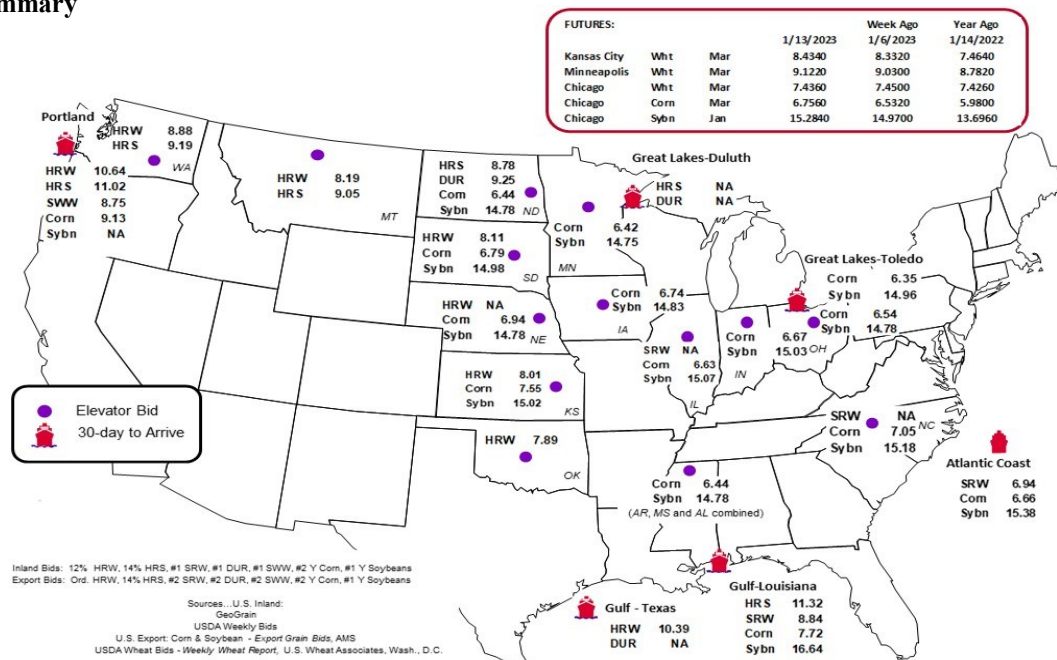
Commodity	Origin-destination	1/13/2023	1/6/2023
Corn	IL-Gulf	-1.09	-1.20
Corn	NE-Gulf	-0.78	-0.84
Soybean	IA-Gulf	-1.81	-1.78
HRW	KS-Gulf	-2.38	-2.38
HRS	ND-Portland	-2.24	-2.22

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

Source: USDA, Agricultural Marketing Service.

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

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 1/7/2023	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,325	2,689	10,702	1,460	4,913	22,089	4,968	3,918
This week last year	1,273	2,649	10,999	1,089	5,831	21,841	3,113	3,143
2023 YTD	2,325	2,689	10,702	1,460	4,913	22,089	4,968	3,918
2022 YTD	1,273	2,649	10,999	1,089	5,831	21,841	3,113	3,143
2023 YTD as % of 2022 YTD	183	102	97	134	84	101	160	125
Last 4 weeks as % of 2022*	118	126	88	104	92	96	151	124
Last 4 weeks as % of 3-yr. avg.**	114	116	84	119	91	93	124	104
Total 2022	93,313	130,118	570,232	66,338	296,945	1,156,946	214,564	214,010

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

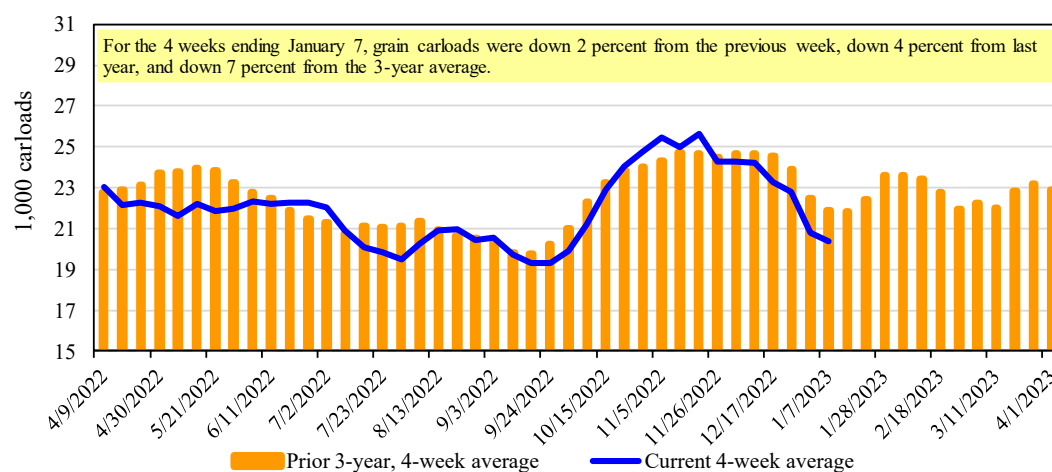
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 2

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 4

Railcar auction offerings¹ (\$/car)²

For the week ending: 1/12/2023		Delivery period							
		Jan-23	Jan-22	Feb-23	Feb-22	Mar-23	Mar-22	Apr-23	Apr-22
BNSF ³	COT grain units	no offer	no offer	no offer	103	no offer	no bids	34	0
	COT grain single-car	no offer	no offer	no offer	52	no offer	0	290	0
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a

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

² Average premium/discount to tariff, last auction. n/a = not available.

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

⁴ UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

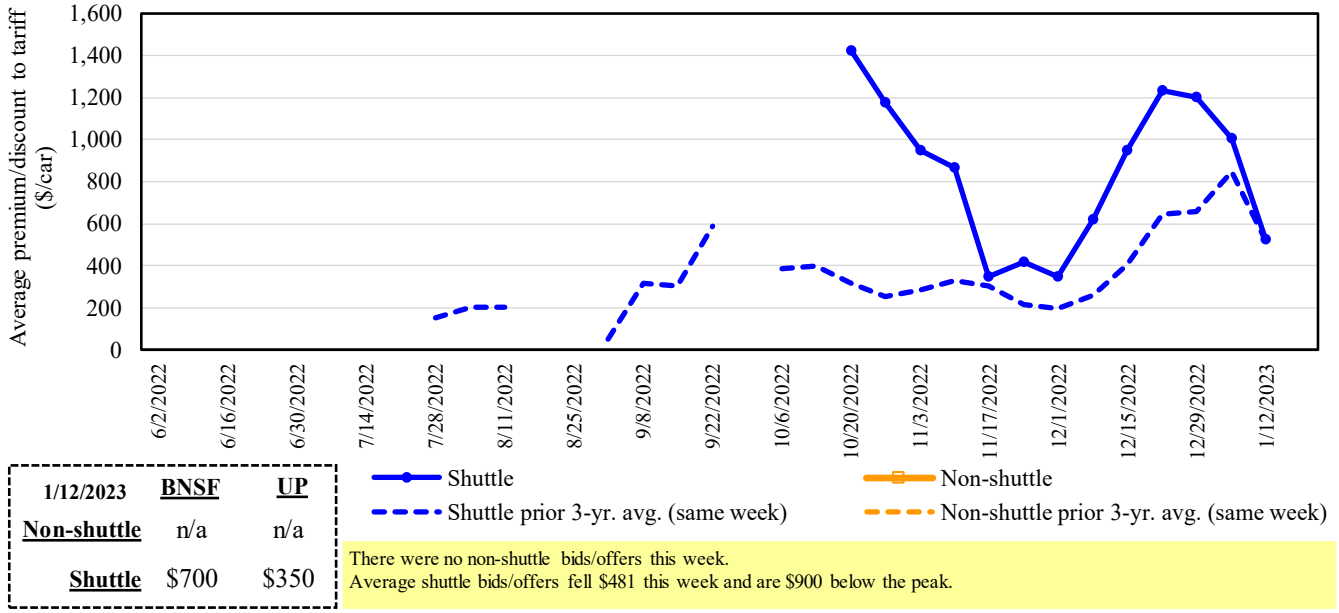
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

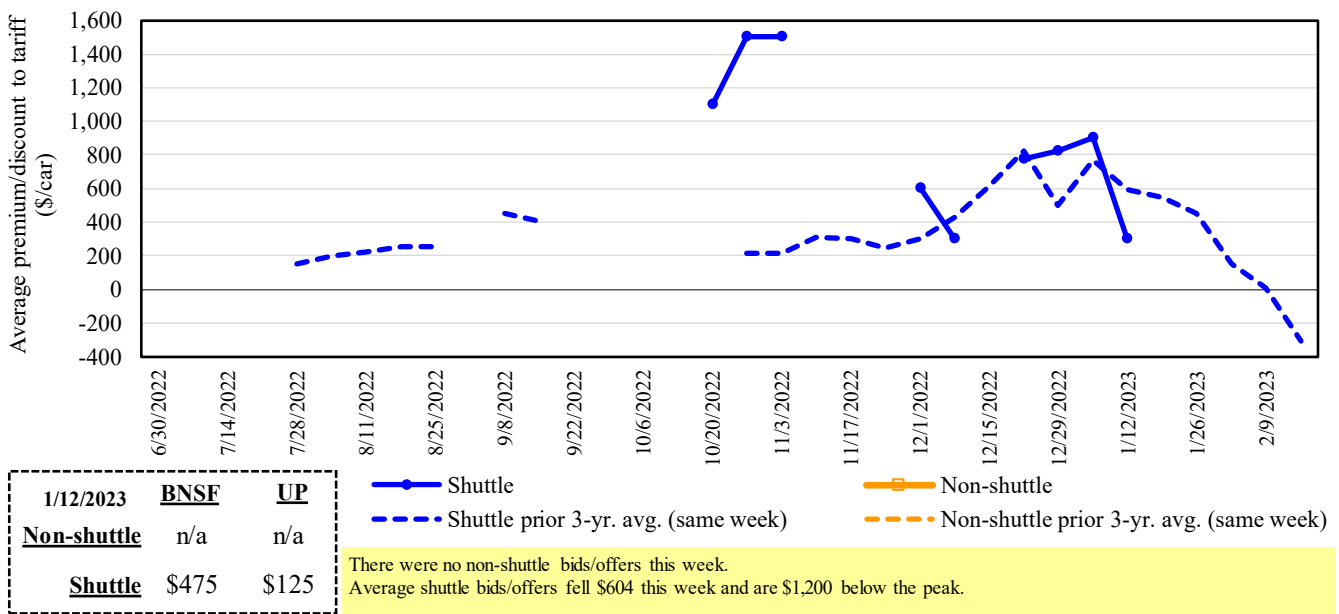
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 3
Secondary market bids/offers for railcars to be delivered in January 2023



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad
Source: USDA, Agricultural Marketing Service.

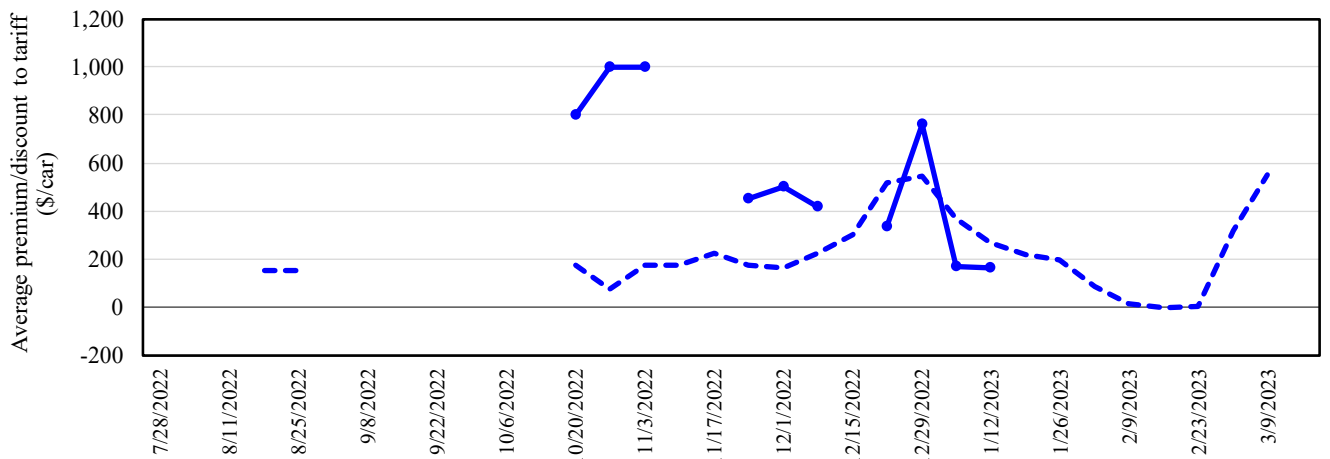
Figure 4
Secondary market bids/offers for railcars to be delivered in February 2023



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad
Source: USDA, Agricultural Marketing Service.

Figure 5

Secondary market bids/offers for railcars to be delivered in March 2023



1/12/2023	BNSF	UP		
Non-shuttle	n/a	n/a		
Shuttle	\$163	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.
 Average shuttle bids/offers fell \$4 this week and are \$838 below the peak.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad
 Source: USDA, Agricultural Marketing Service.

Table 5

Weekly secondary railcar market (\$/car)¹

For the week ending:		Delivery period					
		Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23
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 2022	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 2022	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	700	475	163	n/a	n/a	n/a
	Change from last week	187	167	(5)	n/a	n/a	n/a
	Change from same week 2022	(875)	(875)	(325)	n/a	n/a	n/a
	UP-Pool	350	125	n/a	n/a	n/a	n/a
	Change from last week	(1,150)	(1,375)	n/a	n/a	n/a	n/a
	Change from same week 2022	(1,250)	(1,208)	n/a	n/a	n/a	n/a

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

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool;

BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes 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. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 6

Tariff rail rates for unit and shuttle train shipments¹

January 2023	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	\$3,695	\$324	\$39.91	\$1.09	4
	Grand Forks, ND	Duluth-Superior, MN	\$3,858	\$152	\$39.82	\$1.08	9
	Wichita, KS	Los Angeles, CA	\$7,490	\$780	\$82.13	\$2.24	11
	Wichita, KS	New Orleans, LA	\$4,600	\$570	\$51.34	\$1.40	7
	Sioux Falls, SD	Galveston-Houston, TX	\$7,226	\$641	\$78.12	\$2.13	10
	Colby, KS	Galveston-Houston, TX	\$4,850	\$624	\$54.36	\$1.48	7
	Amarillo, TX	Los Angeles, CA	\$5,121	\$868	\$59.48	\$1.62	8
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$644	\$46.12	\$1.17	7
	Toledo, OH	Raleigh, NC	\$8,551	\$705	\$91.92	\$2.33	9
	Des Moines, IA	Davenport, IA	\$2,655	\$136	\$27.72	\$0.70	8
	Indianapolis, IN	Atlanta, GA	\$6,593	\$530	\$70.73	\$1.80	9
	Indianapolis, IN	Knoxville, TN	\$5,564	\$343	\$58.66	\$1.49	9
	Des Moines, IA	Little Rock, AR	\$4,250	\$401	\$46.18	\$1.17	11
	Des Moines, IA	Los Angeles, CA	\$6,130	\$1,167	\$72.46	\$1.84	13
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,856	\$1,001	\$48.23	\$1.31	19
	Toledo, OH	Huntsville, AL	\$7,037	\$503	\$74.87	\$2.04	8
	Indianapolis, IN	Raleigh, NC	\$7,843	\$715	\$84.99	\$2.31	10
	Indianapolis, IN	Huntsville, AL	\$5,689	\$339	\$59.87	\$1.63	9
	Champaign-Urbana, IL	New Orleans, LA	\$4,865	\$644	\$54.71	\$1.49	9
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,393	\$449	\$48.08	\$1.31	13
	Wichita, KS	Galveston-Houston, TX	\$4,311	\$349	\$46.28	\$1.26	4
	Chicago, IL	Albany, NY	\$7,090	\$666	\$77.02	\$2.10	10
	Grand Forks, ND	Portland, OR	\$6,051	\$775	\$67.79	\$1.84	13
	Grand Forks, ND	Galveston-Houston, TX	\$5,399	\$807	\$61.63	\$1.68	15
	Colby, KS	Portland, OR	\$5,923	\$1,023	\$68.98	\$1.88	6
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$944	\$65.58	\$1.67	18
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$864	\$64.39	\$1.64	17
	Champaign-Urbana, IL	New Orleans, LA	\$4,170	\$644	\$47.80	\$1.21	13
	Lincoln, NE	Galveston-Houston, TX	\$4,360	\$504	\$48.30	\$1.23	16
	Des Moines, IA	Amarillo, TX	\$4,670	\$504	\$51.38	\$1.31	11
	Minneapolis, MN	Tacoma, WA	\$5,660	\$936	\$65.51	\$1.66	18
	Council Bluffs, IA	Stockton, CA	\$5,580	\$968	\$65.03	\$1.65	18
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,350	\$864	\$71.64	\$1.95	15
	Minneapolis, MN	Portland, OR	\$6,400	\$944	\$72.93	\$1.98	16
	Fargo, ND	Tacoma, WA	\$6,250	\$769	\$69.70	\$1.90	14
	Council Bluffs, IA	New Orleans, LA	\$5,095	\$742	\$57.97	\$1.58	9
	Toledo, OH	Huntsville, AL	\$5,277	\$503	\$57.39	\$1.56	11
Grand Island, NE	Portland, OR	\$5,730	\$1,048	\$67.31	\$1.83	15	

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 pounds per bushel (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 (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 7

Tariff rail rates for U.S. bulk grain shipments to Mexico

Date: December 2021			Tariff rate plus		fuel surcharge per:		Percent
Commodity	Origin state	Destination region	Tariff rate per car ¹	Fuel surcharge per car ²	fuel surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,699	\$0	\$78.67	\$2.14	4
	OK	Cuautitlan, EM	\$6,900	\$230	\$72.85	\$1.98	6
	KS	Guadalajara, JA	\$7,619	\$719	\$85.19	\$2.32	7
	TX	Salinas Victoria, NL	\$4,420	\$138	\$46.57	\$1.27	4
Corn	IA	Guadalajara, JA	\$9,102	\$663	\$99.77	\$2.53	6
	SD	Celaya, GJ	\$8,300	\$0	\$84.81	\$2.15	2
	NE	Queretaro, QA	\$8,322	\$462	\$89.75	\$2.28	5
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,687	\$450	\$83.14	\$2.11	5
	SD	Torreón, CU	\$7,825	\$0	\$79.95	\$2.03	2
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$614	\$94.63	\$2.57	5
	NE	Guadalajara, JA	\$9,207	\$646	\$100.67	\$2.74	5
	IA	El Castillo, JA	\$9,510	\$0	\$97.17	\$2.64	1
	KS	Torreón, CU	\$8,109	\$466	\$87.61	\$2.38	5
Sorghum	NE	Celaya, GJ	\$7,932	\$597	\$87.15	\$2.21	6
	KS	Queretaro, QA	\$8,108	\$287	\$85.77	\$2.18	3
	NE	Salinas Victoria, NL	\$6,713	\$231	\$70.94	\$1.80	3
	NE	Torreón, CU	\$7,225	\$438	\$78.29	\$1.99	6

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; Y/Y = year over year.

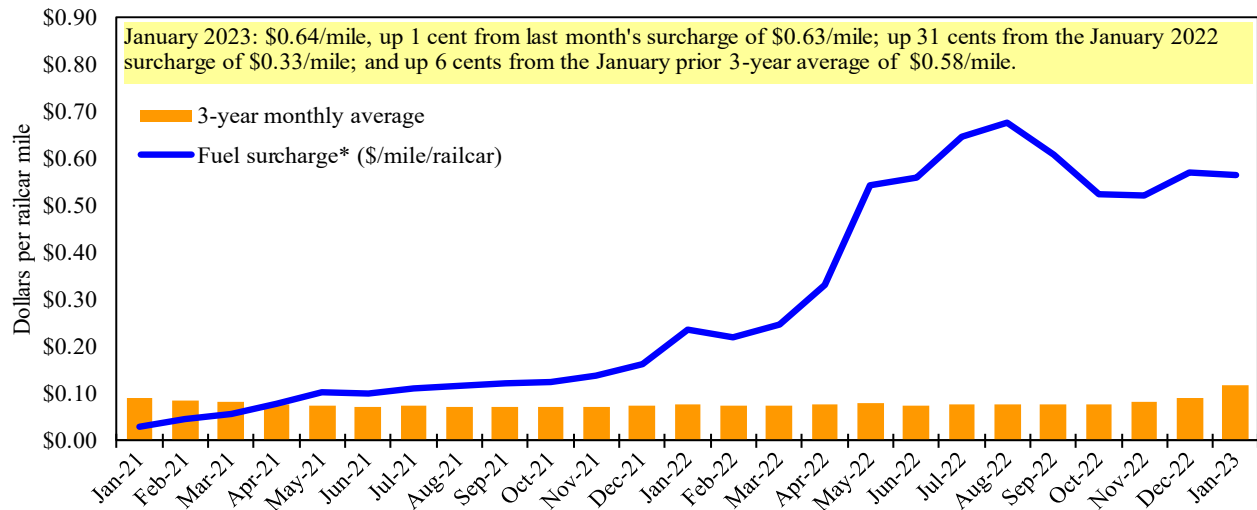
⁵As of January 1, 2022, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico.

As we incorporate the change, Table 8 updates will be delayed.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

Figure 6

Railroad fuel surcharges, North American weighted average¹



¹Weighted 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.

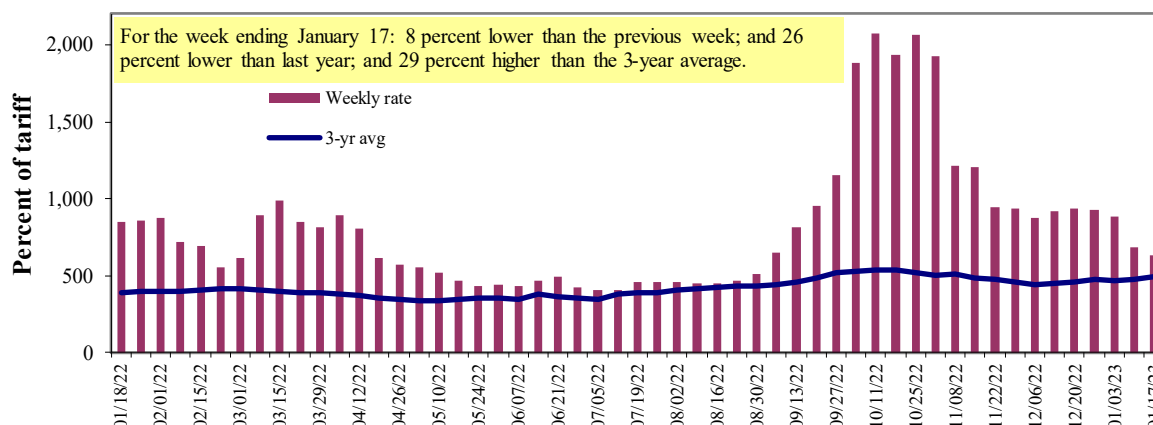
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 7

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: USDA, Agricultural Marketing Service.

Table 8

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	1/17/2023	-	-	630	483	527	527	372
	1/10/2023	-	-	684	541	594	594	444
\$/ton	1/17/2023	-	-	29.23	19.27	24.72	21.29	11.68
	1/10/2023	-	-	31.74	21.59	27.86	24.00	13.94
Current week % change from the same week:								
	Last year	-	-	-26	-34	-27	-27	-35
	3-year avg. ²	-	-	29	23	25	25	11
Rate ¹	February	-	-	568	439	478	478	360
	April	556	515	503	401	443	443	345

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" data not available.

Source: USDA, Agricultural Marketing Service.

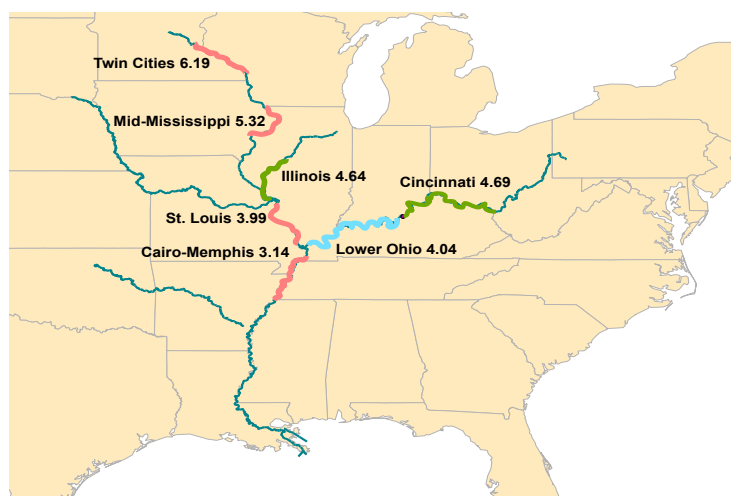
Figure 8

Benchmark tariff rates

Calculating barge rate per ton:

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

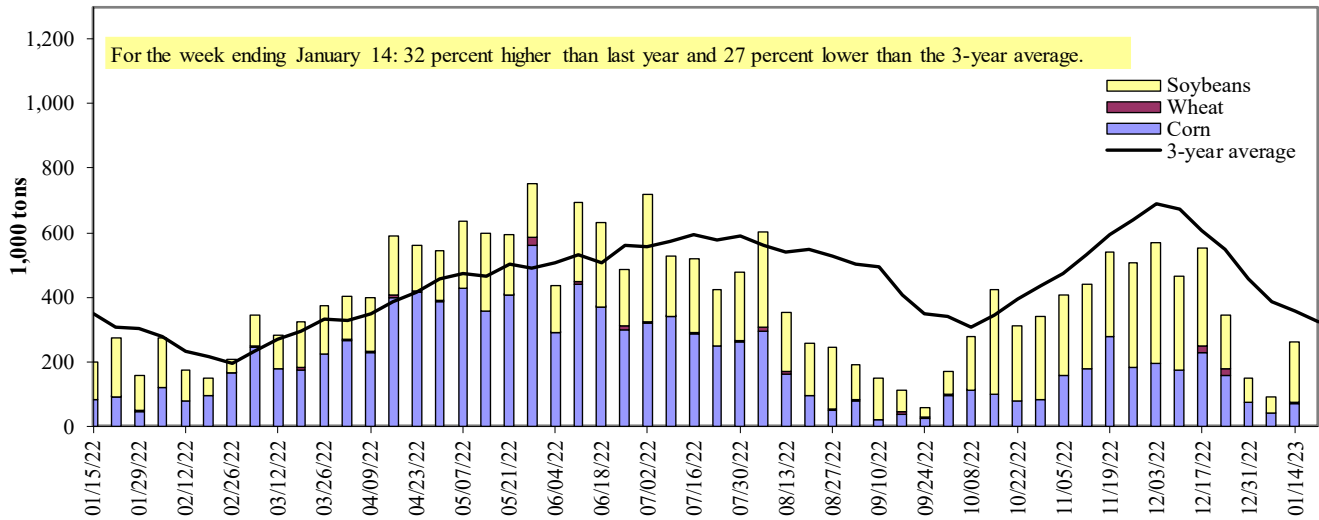
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



Map Credit: USDA, Agricultural Marketing Service

Figure 9

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



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

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Table 9

Barge grain movements (1,000 tons)

For the week ending 01/14/2023	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	2	0	13	0	14
Alton, IL (L26)	71	0	243	14	329
Granite City, IL (L27)	70	3	189	0	263
Illinois River (La Grange)	91	2	268	21	381
Ohio River (Olmsted)	98	0	146	5	250
Arkansas River (L1)	0	11	21	1	34
Weekly total - 2023	169	14	357	7	547
Weekly total - 2022	237	35	218	2	492
2023 YTD ¹	265	16	602	19	901
2022 YTD ¹	505	56	465	12	1,037
2023 as % of 2022 YTD	52	28	130	161	87
Last 4 weeks as % of 2022 ²	62	67	108	69	84
Total 2022	16,437	1,594	14,464	232	32,727

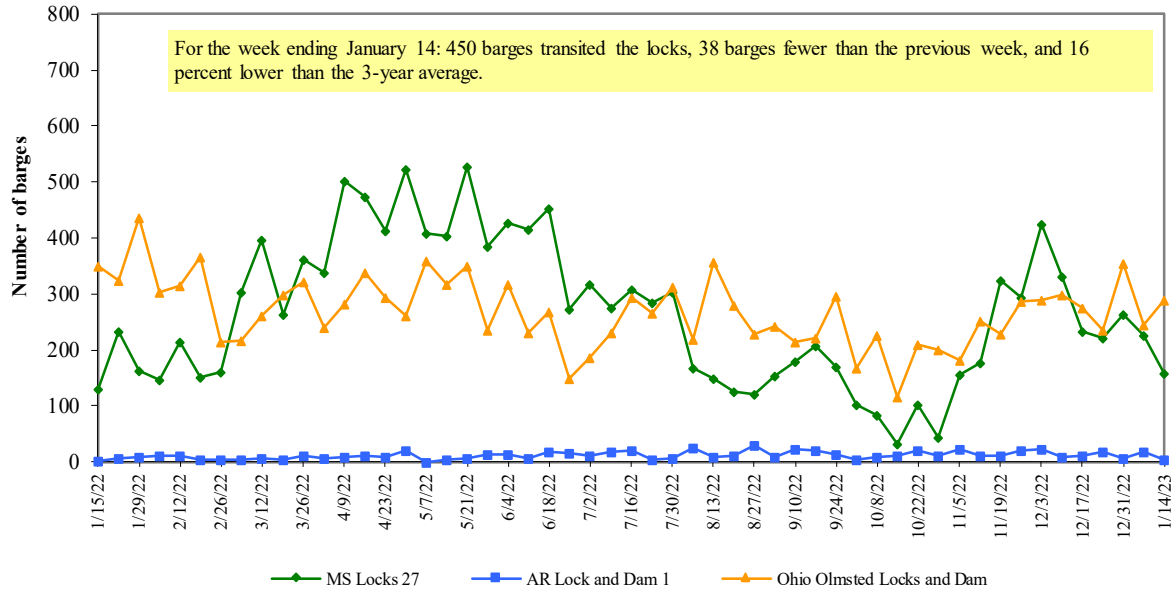
¹ Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

² As a percent of same period in 2022.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

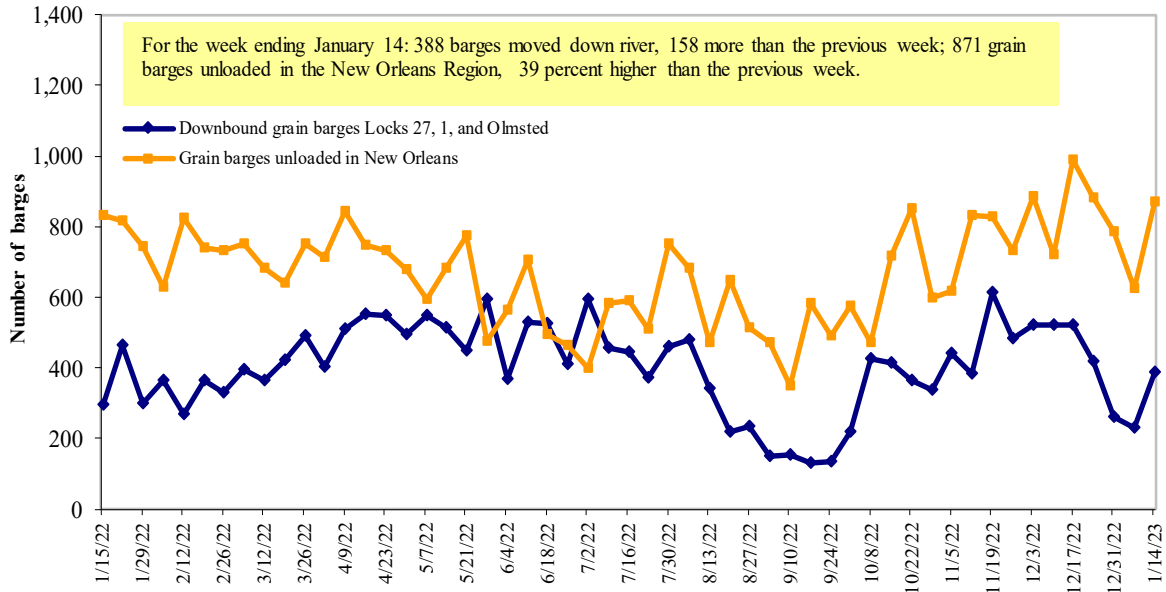
Source: U.S. Army Corps of Engineers.

Figure 10
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
 Source: U.S. Army Corps of Engineers.

Figure 11
Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
 Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

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 10

Retail on-highway diesel prices, week ending 1/16/2023 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.752	-0.060	1.033
	New England	5.081	-0.013	1.383
	Central Atlantic	5.039	-0.164	1.162
	Lower Atlantic	4.614	-0.027	0.990
II	Midwest	4.374	-0.016	0.771
III	Gulf Coast	4.224	0.001	0.761
IV	Rocky Mountain	4.729	0.032	1.051
V	West Coast	5.034	-0.046	0.583
	West Coast less California	4.688	-0.072	0.621
	California	5.430	-0.018	0.641
Total	United States	4.524	-0.025	0.799

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

Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

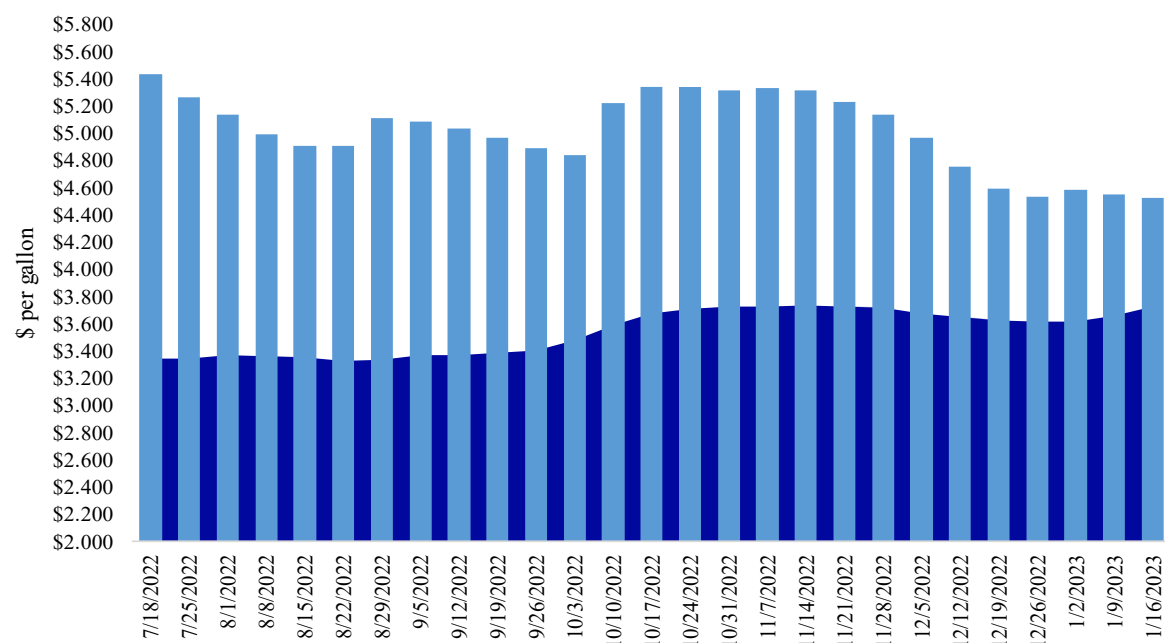
Source: U.S. Department of Energy, Energy Information Administration.

Figure 12

Weekly diesel fuel prices, U.S. average

For the week ending January 16, the U.S. average diesel fuel price decreased 2.5 cents from the previous week to \$4.524 per gallon, 79.9 cents above the same week last year.

■ Last year ■ Current year
\$3.725 \$4.524



Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

Grain Exports

Table 11

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									
1/5/2023	954	627	1,296	1,208	121	4,205	11,612	14,741	30,559
This week year ago	2,041	680	1,260	806	54	4,841	25,790	10,804	41,434
Cumulative exports-marketing year²									
2022/23 YTD	3,195	1,764	3,227	2,502	168	10,856	10,384	29,662	50,902
2021/22 YTD	4,318	1,698	3,077	2,101	113	11,307	15,665	31,634	58,605
YTD 2022/23 as % of 2021/22	74	104	105	119	149	96	66	94	87
Last 4 wks. as % of same period 2021/22	47	92	106	152	216	88	46	149	78
Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622
Total 2020/21	8,422	1,790	7,500	6,438	656	24,807	66,958	60,571	152,335

¹ Current unshipped (outstanding) export sales to date.

² Shipped export sales to date.

Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW = soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 12

Top 5 importers¹ of U.S. corn

For the week ending 1/05/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
	1,000 mt -			
Mexico	10887	12,304	(12)	15,227
China	3863	12,356	(69)	12,616
Japan	1728	4,194	(59)	10,273
Columbia	397	2,439	(84)	4,398
Korea	23	78	(70)	2,563
Top 5 importers	16,898	31,372	(46)	45,077
Total U.S. corn export sales	21,996	41,455	(47)	56,665
% of projected exports	45%	66%		
Change from prior week ²	256	458		
Top 5 importers' share of U.S. corn export sales	77%	76%		80%
USDA forecast January 2023	48,982	62,875	(22)	
Corn use for ethanol USDA forecast, January 2023	133,985	135,281	(1)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. 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 (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers¹ of U.S. soybeans

For the week ending 1/05/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
China	26,794	24,087	11	27,283
Mexico	3,375	3,161	7	4,929
Egypt	752	2,035	(63)	3,553
Japan	1,484	1,294	15	2,266
Indonesia	660	745	(11)	2,116
Top 5 importers	33,064	31,322	6	40,147
Total U.S. soybean export sales	44,404	42,437	5	54,231
% of projected exports	82%	72%		
change from prior week ²	717	736		
Top 5 importers' share of U.S. soybean export sales	74%	74%		74%
USDA forecast, January 2023	54,223	58,801	(8)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.

³FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

Top 10 importers¹ of all U.S. wheat

For the week ending 1/05/2023	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
Mexico	2,521	2,858	(12)	3,566
Philippines	1,695	2,447	(31)	2,985
Japan	1,720	1,899	(9)	2,453
China	747	848	(12)	1,537
Nigeria	663	1,595	(58)	1,528
Korea	1,005	986	2	1,459
Taiwan	603	714	(16)	1,106
Indonesia	299	67	346	711
Thailand	610	459	33	703
Colombia	412	488	(16)	621
Top 10 importers	10,275	12,363	(17)	16,669
Total U.S. wheat export sales	15,061	16,148	(7)	22,763
% of projected exports	71%	74%		
change from prior week ²	91	265		
Top 10 importers' share of U.S. wheat export sales	68%	77%		73%
USDA forecast, January 2023	21,117	21,798	(3)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; Marketing year (MY) = Jun 1 - May 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.

³FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number.

Source: USDA, Foreign Agricultural Service.

Table 15

Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 01/12/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of:		2022 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	231	104	221	335	269	125	104	54	9,836
Corn	201	66	305	267	340	79	75	95	9,614
Soybeans	284	211	135	494	701	70	60	71	14,178
Total	715	381	188	1,096	1,310	84	71	71	33,628
Mississippi Gulf									
Wheat	30	20	150	50	161	31	35	50	4,051
Corn	333	61	549	394	1,390	28	61	63	30,780
Soybeans	1,451	559	259	2,010	1,766	114	121	112	31,208
Total	1,814	640	283	2,454	3,317	74	96	94	66,040
Texas Gulf									
Wheat	31	0	n/a	31	92	34	40	38	3,421
Corn	0	0	n/a	0	0	n/a	0	0	648
Soybeans	52	0	n/a	52	0	n/a	n/a	89	685
Total	83	0	n/a	83	93	90	87	53	4,754
Interior									
Wheat	43	18	243	60	76	79	165	132	2,900
Corn	220	141	156	361	314	115	107	127	8,914
Soybeans	204	104	196	308	256	121	115	107	7,034
Total	467	263	178	729	646	113	116	119	18,848
Great Lakes									
Wheat	3	0	n/a	3	0	n/a	311	178	395
Corn	0	0	n/a	0	0	n/a	n/a	0	158
Soybeans	0	0	n/a	0	0	n/a	2	3	760
Total	3	1	n/a	3	0	n/a	101	94	1,312
Atlantic									
Wheat	0	0	n/a	0	4	0	0	0	168
Corn	7	5	152	12	10	114	151	453	302
Soybeans	139	76	183	215	104	206	198	192	2,857
Total	146	80	182	226	119	190	191	195	3,327
U.S. total from ports*									
Wheat	337	142	237	480	603	80	85	62	20,772
Corn	761	272	280	1,033	2,054	50	73	80	50,416
Soybeans	2,129	950	224	3,080	2,828	109	109	104	56,722
Total	3,227	1,365	236	4,592	5,485	84	94	91	127,910

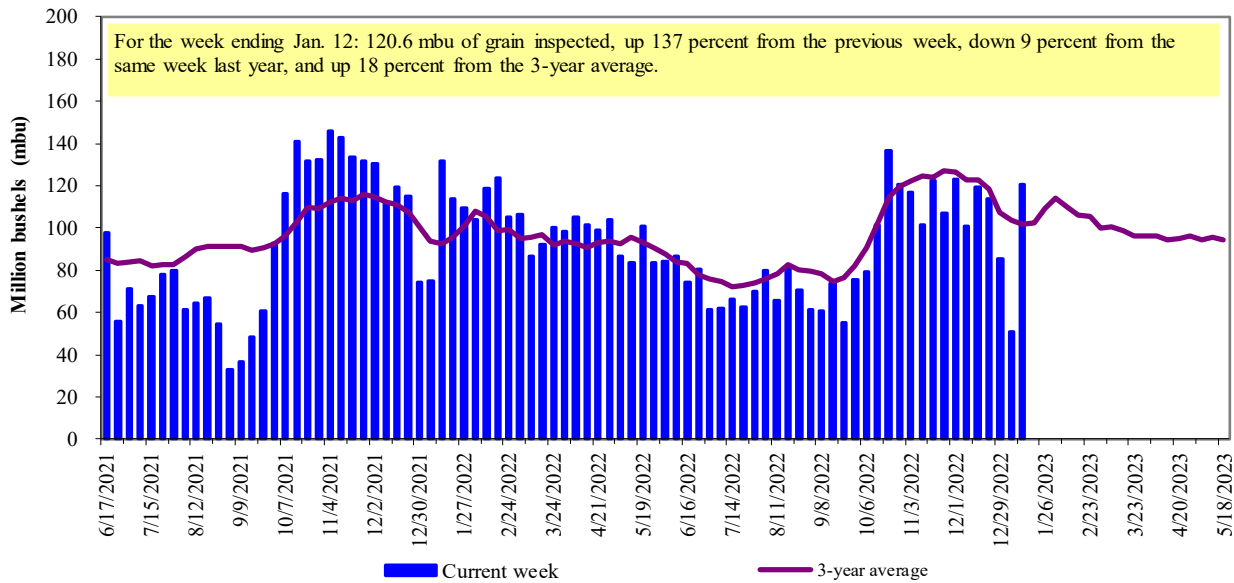
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

Figure 13

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

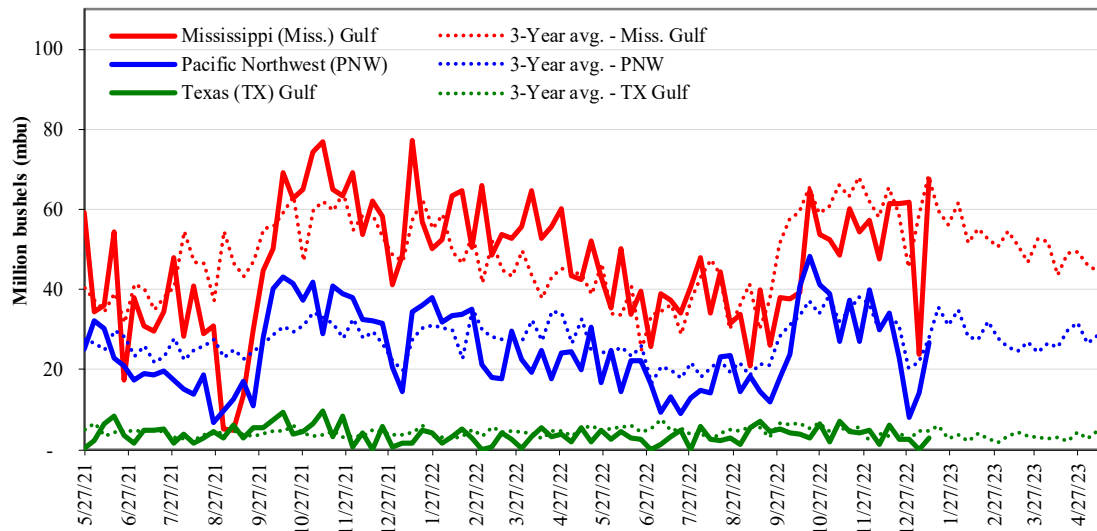


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending	01/12/23 inspections (mbu):	Percent change	MS Gulf	TX	U.S. Gulf	PNW
MS Gulf:	67.5	Last wk:	up 185	n/a	up 198	up 89
PNW:	26.8	Last Year (same wk):	down 12	up 84	down 10	down 22
TX Gulf:	3.0	3-yr avg. (4-wk. mov. Avg):	up 17	down 24	up 14	up 6

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

Weekly port region grain ocean vessel activity (number of vessels)

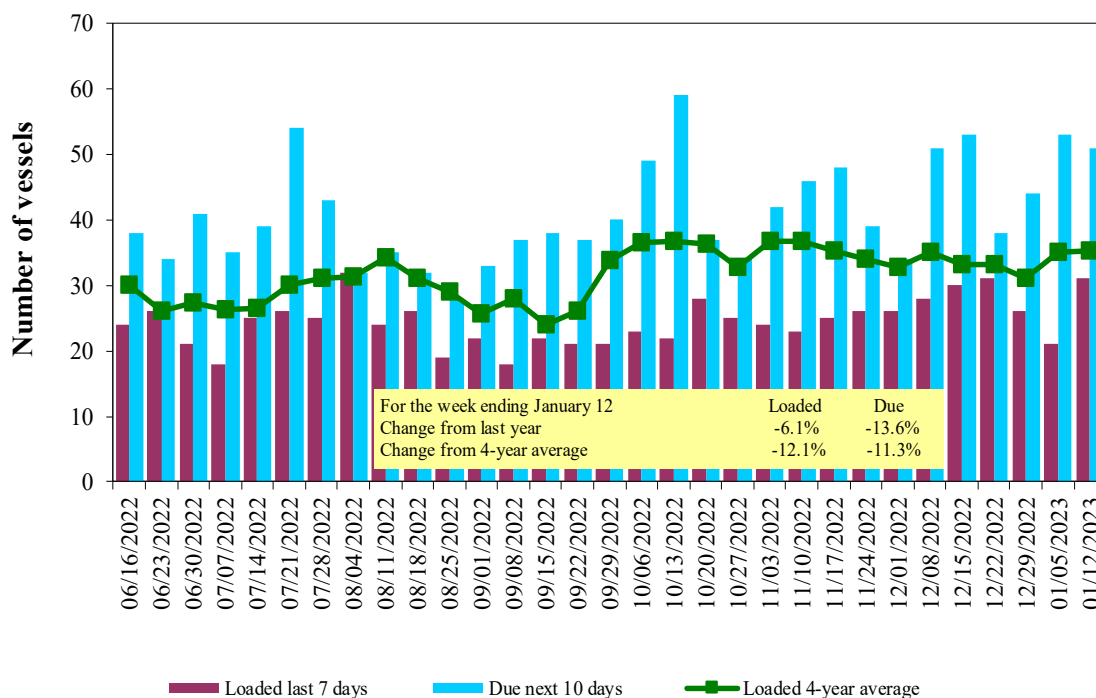
Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/12/2023	29	31	51	18
1/5/2023	26	21	53	16
2022 range	(14...61)	(18...39)	(28...62)	(5...23)
2022 average	30	28	44	13

Note: The data is voluntarily collected and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 15

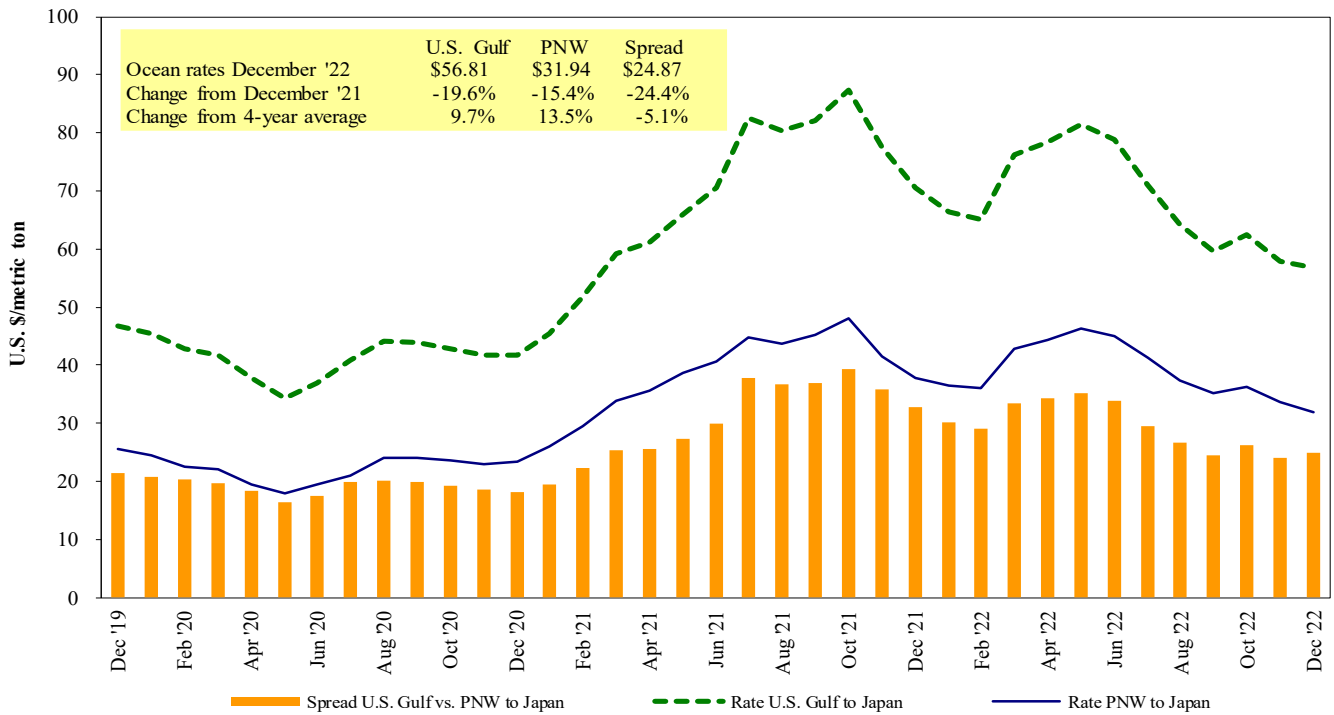
U.S. Gulf¹ vessel loading activity



¹U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source: USDA, Agricultural Marketing Service.

Figure 16

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 17

Ocean freight rates for selected shipments, week ending 01/14/2023

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
U.S. Gulf	Japan	Heavy grain	Jul 20/30, 2022	50,000	81.50
U.S. Gulf	Japan	Heavy grain	Jun 1/10, 2022	50,000	89.65
U.S. Gulf	Japan	Heavy grain	May 1/20, 2022	50,000	78.90
U.S. Gulf	S. China	Corn	Aug 1/10, 2022	68,000	71.00
U.S. Gulf	Djibouti	Sorghum	Oct 5/15, 2022	13,920	94.08*
U.S. Gulf	Djibouti	Wheat	Nov 5/15, 2022	22,500	102.88*
U.S. Gulf	Honduras	Soybean Meal	Feb 18/28, 2022	7,820	57.15*
U.S. Gulf	S. Korea	Heavy grain	Jun 1/Jul, 2022	55,000	82.75
U.S. Gulf	Sudan	Sorghum	Mar 1/10, 2022	35,790	149.97*
PNW	Yemen	Wheat	Jul 10/20, 2022	27,000	169.50*
Brazil	N. China	Heavy grain	Mar 18/27, 2022	64,000	56.85
Argentina	Taiwan	Corn	May 1/Jun, 2022	65,000	85.00
Australia	Vietnam	Heavy grain	Feb 24/Apr 9, 2023	60,000	20.80

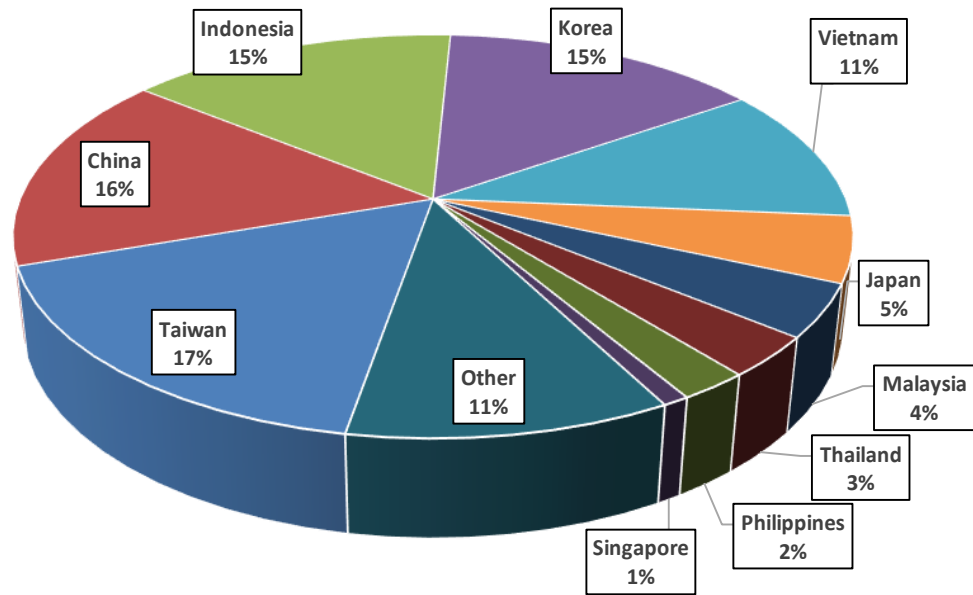
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

op = option.

In 2020, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 66 percent of U.S. waterborne grain exports in 2020 went to Asia, of which 14 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

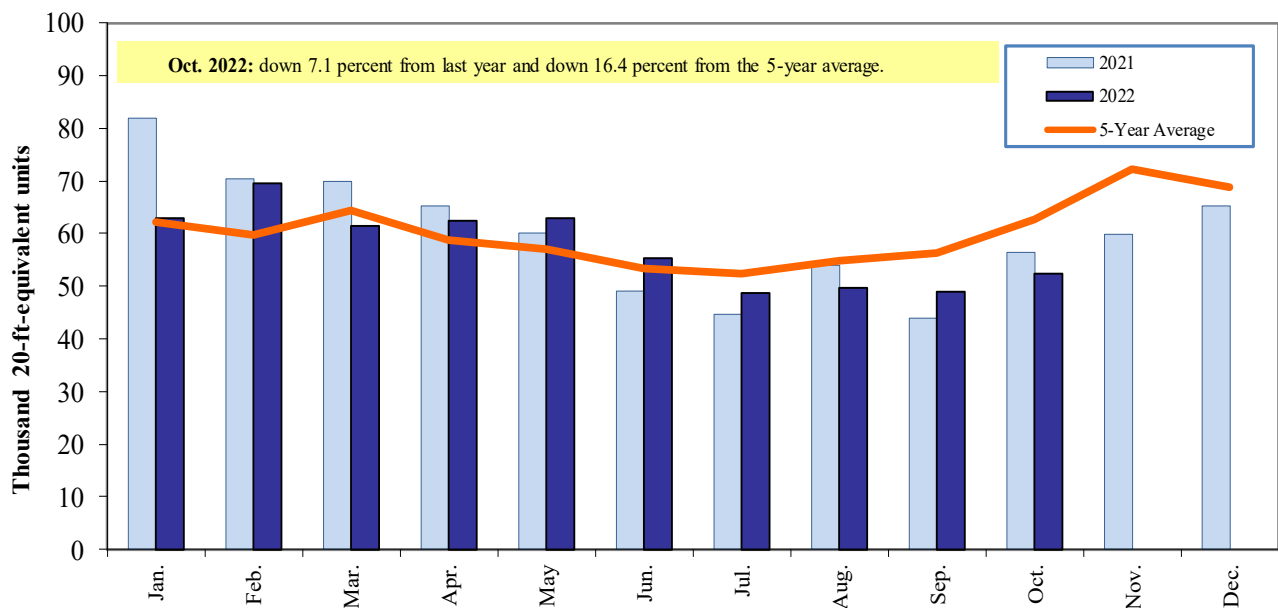
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Oct 2022



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '230330', '2304', and '230990'.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 18
Monthly shipments of U.S. containerized grain exports



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '230330', '2304', and '230990'.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

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