



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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January 26, 2017

WEEKLY HIGHLIGHTS

Contents

Article/
Calendar

Grain
Transportation
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean
Rate Advisory

Datasets

Specialists

Subscription
Information

The next
release is
Feb. 2, 2017

Total Grain Inspections Down

For the week ending January 19, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.53 million metric tons (mmt), down 9 percent from the previous week, up 24 percent from last year, and 11 percent above the 3-year average. Corn inspections increased 7 percent from the previous week, but inspections of wheat and soybeans decreased 28 and 13 percent, respectively, for the same period. Mississippi Gulf inspections increased 10 percent from the previous week, but Pacific Northwest (PNW) inspections decreased 14 percent for the same period. Outstanding export sales (unshipped) are up for corn but down for wheat and soybeans.

U.S. Retail Diesel Prices Are Forecast to Increase

Although gasoline consumption is expected to moderate slightly from 2016, the Energy Information Administration (EIA) projects higher crude oil prices and growing diesel consumption (see [Grain Transportation Report, dated January 12, 2017](#)) to drive retail diesel prices to average \$2.73 per gallon in 2017 and \$2.84 per gallon in 2018. According to EIA, the annual average diesel price in 2016 was \$2.31 per gallon, the lowest since 2004. Highway travel grew 2.6 percent in 2016, and EIA expects it to grow 1.1 percent in 2017.

Railroads Affected by Winter Weather

The Class I railroads in the western United States, BNSF Railway and Union Pacific Railway (UP), continue to respond to and recover from poor winter weather. As noted in the U.S. Department of Commerce and USDA's recent [Weekly Weather and Crop Bulletin](#), below normal temperatures occurred across the interior Northwest last week. Both railroads have reported repeated weather service disruptions due to weather delays in December and January, particularly in the Pacific Northwest, along the Northern Corridor, and in Northern California. Ice is especially troublesome to railroads because it can prevent crews from reaching trains, increase the risk of derailment, and create challenges for the braking systems of trains, all resulting in slower train speeds and turn times. The railroads also reported issues with washed-out track due to heavy rains and downed trees due to heavy snow. The Surface Transportation Board's backlog data reflect these service disruptions to some degree. For example, for the 4 weeks ending January 4, average backlogs increased by 136 cars for BNSF, 127 for Canadian Pacific, and 291 cars for UP, compared to the previous 4 weeks. These small increases in outstanding orders are likely partially due to the extreme weather.

Snapshots by Sector

Export Sales

During the week ending January 12, **unshipped balances** of wheat, corn, and soybeans totaled 39.2 mmt, up 51 percent from the same time last year. Net weekly **wheat export sales** were .243 mmt, down 38 percent from the previous week. Net **corn export sales** were 1.37 mmt, up 127 percent from the previous week, and net **soybean export sales** were .980 mmt, up noticeably from the past week.

Rail

U.S. Class I railroads originated 24,417 **grain carloads** for the week ending January 14, up 14 percent from the previous week, up 4 percent from last year, and up 6 percent from the 3-year average.

Average February shuttle **secondary railcar bids/offers** per car were \$833 above tariff for the week ending January 19, up \$83 from last week, and \$846 higher than last year. Average non-shuttle secondary railcar bids/offers per car were \$31 above tariff, unchanged from last week, and \$94 higher than last year.

Barge

For the week ending January 21, **barge grain movements** totaled 736,052 tons, 7 percent higher than the last week, and up 21 percent from the same period last year.

For the week ending January 21, 463 grain barges **moved down river**, up 6 percent from last week, 858 grain barges were **unloaded in New Orleans**, up 3 percent from the previous week.

Ocean

For the week ending January 19, 43 **ocean-going grain vessels** were loaded in the Gulf, 2 percent less than the same period last year. Seventy-four vessels are expected to be loaded within the next 10 days, 4 percent more than the same period last year.

For the week ending January 19, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$35.25 per metric ton, 1 percent higher than the previous week. The cost of shipping from the PNW to Japan was \$18 per metric ton, unchanged from the previous week.

Fuel

During the week ending January 23, U.S. average **diesel fuel prices** were down 2 cents from the previous week at \$2.57 per gallon, 50 cents higher than the same week last year.

Feature Article/Calendar

U.S. Grain Stocks: Looking Back at 2016 to Set the Stage for 2017

Grain storage and transportation are intimately related. The availability of storage gives farmers and elevators the flexibility to sell at any time of the year rather than selling at harvest. The use and scarcity of storage is therefore an essential factor in the demand for transportation. Stores of grain, or stocks, tend to rise the most during and immediately following harvests, especially for corn and soybeans in the fall. This makes the demand for transportation at harvest lower than it otherwise would be without storage. In the months preceding harvest, stocks tend to fall as grain farmers and elevators sell off old crop stocks, making the demand for transportation higher than it otherwise would be without storage. This article explores the relationship between storage, stocks, and transportation, explaining trends in rail and barge shipments over the past year. The article also discusses the most recent storage capacity and stocks data, both at the national and State levels.

Grain Stocks and Transportation over the Past Year

Both grain stocks and grain transportation showed unique patterns in 2016. Stocks were above average. Barge and rail shipments were also both above average and seasonally early. This section discusses the factors behind grain stocks and the relationship between stocks and the demand for transportation in order to explain the unique patterns observed in 2016.

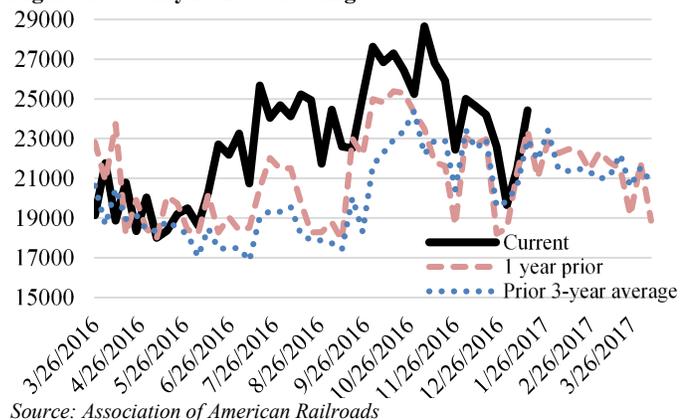
Production is an important factor behind grain storage demand and explains why grain stocks have been high in recent years. Grain production in the United States has followed an upward trend since a severe drought affected much of the Midwest in 2012, increasing every year except 2015, which saw a slight decrease from 2014. This has contributed to growing volumes held in both off-farm (commercial) and on-farm storage in early December, which follows the main corn and soybean harvests in the United States.

USDA's National Agricultural Statistics Service (NASS) collects data on the amount of grain stored (i.e., stocks) on- and off-farm at 4 points during the year: March 1, June 1, September 1, and December 1. Each snapshot is valuable in its own way. Since the corn and soybean harvests are mostly concluded by late November, "December 1" grain stocks give an indication of the "total grain supply" available for export and use during the marketing year (until next season's harvests begin). March 1 and June 1 then provide snapshots of how much grain remains in storage as time progresses during the marketing year.

In late 2015 and through much of 2016, the U.S. grain system retained above-average amounts of grain. According to NASS data, grain stocks on December 1, 2015 were 4 percent higher than the previous year.* As grain production in 2015 was down 2 percent from 2014 production, this was an early indication that farmers and commercial facilities were storing a large portion of their grain. Producers and merchandisers continued to hold substantial amounts of grain into March and June of 2016, with grain stocks up 6 percent and 13 percent, respectively, from the same time in 2015. In fact, grain stocks on June 1, 2016, were at their largest levels since the late 1980s (see [Grain Transportation Report \(GTR\), dated July 7, 2016](#)).

The effects of unusually large March and June stocks showed up in 2016 transportation patterns. Not only were rail and barge movements above average throughout the year, they were also early. While grain carloads by rail typically decline through mid-July, carloads began increasing in early June. Railroads hauled well-above-average grain carloads for the remainder of the year. These observations, particularly the early June activity in carloads, were likely the result of unusually high stocks (see Figure 1 and [GTR Figure 3](#)). Similar patterns in river traffic occurred throughout the year. Beginning in June, the number of barges unloaded at the New Orleans area export ports were consistently above the 3-year average

Figure 1: Weekly Rail Carloadings.



* Grain stocks include barley, corn, oats, sorghum, soybeans, and wheat. Data available from USDA-NASS [Grain Stocks](#) reports and [Quick Stats](#).

through November. During the third quarter, the number of grain barges unloaded at the Mississippi Gulf was up 52 percent compared to the prior 3-year average.*

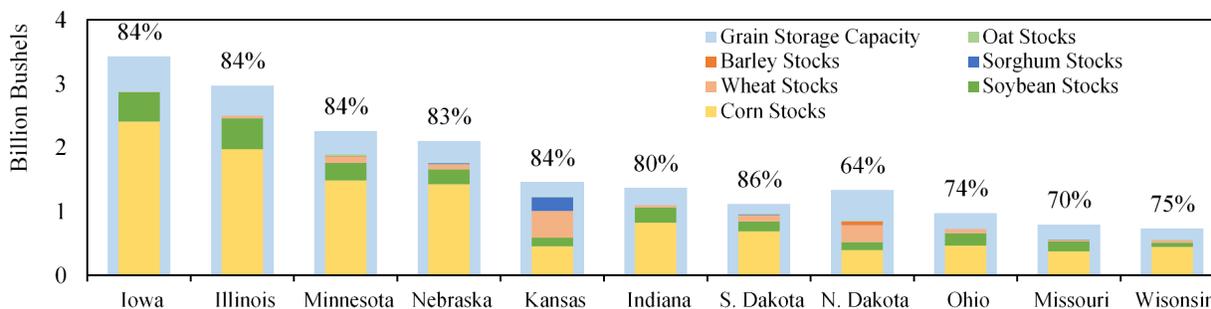
December 2016 Grain Stocks and Capacity

Given the observed trends in stocks and transportation throughout the first part of 2016, this section now turns to the December 1, 2016 stocks that will likely carry over into 2017.

Looking at trends in stocks relative to storage capacity can provide a sense of current storage constraints. Figure 2 shows national annual trends in December 1 grain stocks, grain storage capacity, and grain stocks as a percent of capacity. Grain stocks in December 2016 were 10 percent higher than they were at the same time in 2015. Total corn stocks were up 10 percent, soybean stocks were up 6 percent, and wheat stocks were up 19 percent. Total storage capacity was up 1 percent in 2016 over the previous year, with off-farm storage increasing less than 1 percent and on-farm storage increasing 2 percent. Given these changes, stocks continued their upward path as a percent of total capacity (Figure 2). Assuming similar production levels next season, these trends suggest that 2017 might be similar to 2016 with large stocks and relatively scarce storage. This implies emptying of bins may be needed throughout the first half of 2017 in order to make room for the 2017 harvests of corn, soybeans, wheat, and other crops. Similar to 2016, this could mean another strong year for grain transportation demand, with seasonal trends beginning earlier than is typical historically. However, it is worth noting that pressure from large grain supplies, especially in late spring and early summer, may be lessened somewhat as NASS has projected the 2017 U.S. winter wheat acreage to fall 10 percent from 2016 and 18 percent below 2015.†

The previous discussion largely focused on observations at the national level. A State-level examination is helpful for obtaining additional insights based on location. Figure 3 offers a glimpse of grain stocks in the December 2016 grain stocks report at the State level, illustrating the volume of total grain storage capacity (on- and off-farm), the types and volumes of the different grains in storage, and the ratio of grain stocks to grain storage (expressed as a percentage). Given the harvesting of corn and soybean is typically finished by the end of November, the December 1 report usually represents the largest amount of stocks carried over into 2017. Therefore, this provides an indication of the amount of stocks that may need to move prior to the beginning of the 2017 harvest. States with the greatest excess capacity will have less pressure to empty bins prior to harvest. Therefore, the relationship between stocks and capacity at the State level will give some indication of where any seasonally early transportation demand may occur.

Figure 3: December Grain Stocks (by Commodity) and Grain Storage Capacity in Top-Stock States, 2016.



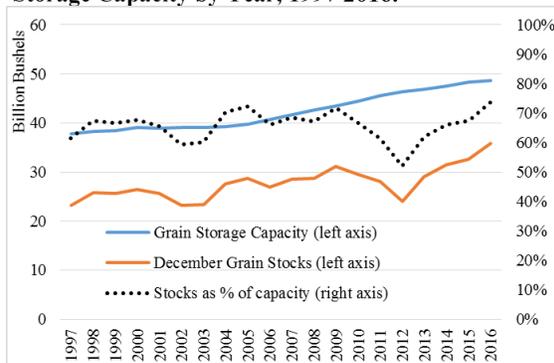
SOURCE: NATIONAL AGRICULTURAL STATISTICS SERVICE

The relationship between storage and transportation is complicated and depends on many factors like changes in basis, harvest projections, demand shifts, and temporary storage. The December 1-grain stock data suggests that, all else equal and absent unforeseen changes in normal production trends, transportation demand could be strong in the first half of 2017. Jesse.Gastelle@ams.usda.gov, PeterA.Caffarelli@ams.usda.gov

* Data on barges unloaded is obtained from USDA’s Grain Inspection, Packers and Stockyards Administration.

† USDA, National Agricultural Statistics Service, *Winter Wheat and Canola Seedings*, January 12, 2017. According to [the report](#), the planted area of winter wheat for harvest in 2017 is 32.4 million acres, representing “the second lowest United States acreage on record.” Indications of 2017 corn and soybean production are not currently available as of this writing.

Figure 2: National December Grain Stocks and Grain Storage Capacity by Year, 1997-2016.



Source: National Agricultural Statistics Service

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck		Rail		Barge	Ocean	
		Unit	Train	Shuttle		Gulf	Pacific
01/25/17	172		272	238	208	158	128
01/18/17	173		270	250	192	157	128

¹Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)

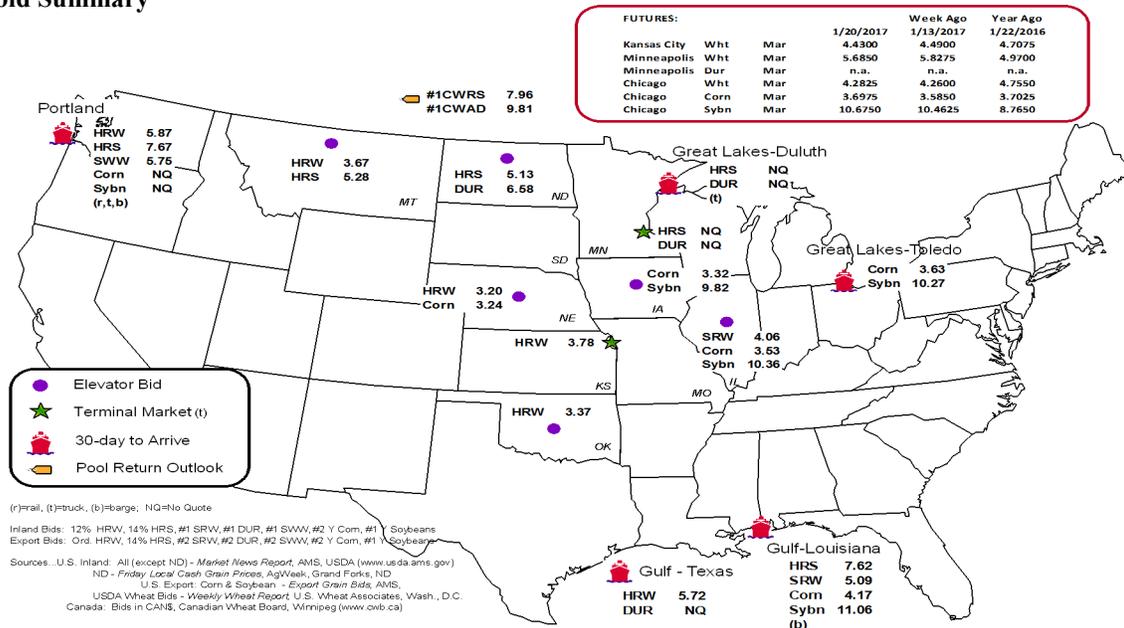
Commodity	Origin--Destination	1/20/2017	1/13/2017
Corn	IL--Gulf	-0.64	-0.60
Corn	NE--Gulf	-0.93	-0.90
Soybean	IA--Gulf	-1.24	-1.21
HRW	KS--Gulf	-1.94	-1.90
HRS	ND--Portland	-2.54	-2.30

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

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &		Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf				
01/18/2017 ^p	790	1,661	5,208	928	8,587	1/14/2017	2,559	
1/11/2017 ^r	732	1,602	5,909	742	8,985	1/7/2017	1,128	
2017 YTD ^r	2,429	5,211	16,402	2,443	26,485	2017 YTD	3,687	
2016 YTD ^r	1,277	4,188	15,338	2,016	22,819	2016 YTD	2,795	
2017 YTD as % of 2016 YTD	190	124	107	121	116	% change YTD	132	
Last 4 weeks as % of 2016 ²	206	118	111	138	119	Last 4wks % 2016	109	
Last 4 weeks as % of 4-year avg. ²	81	137	113	107	112	Last 4wks % 4 yr	131	
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982	
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736	

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 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.

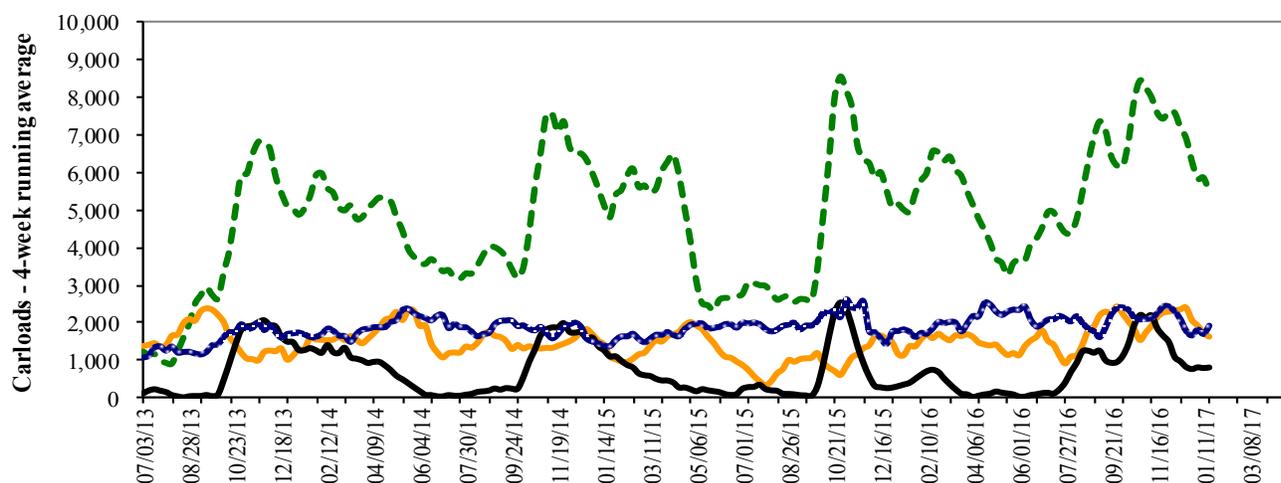
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



- - - Pacific Northwest: 4 wks. ending 1/18--up 11% from same period last year; up 13% from 4-year average
— Texas Gulf: 4 wks. ending 1/18--up 18% from same period last year; up 37% from 4-year average
— Miss. River: 4 wks. ending 1/18--up 106% from same period last year; down 19% from 4-year average
· · · Cross-border: 4 wks. ending 1/14--up 9% from same period last year; up 31% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

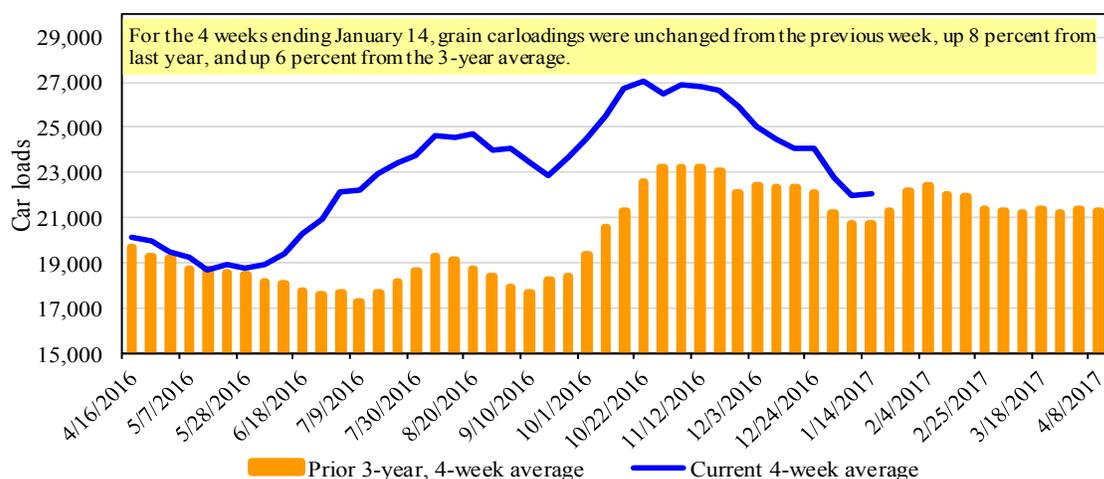
For the week ending: 1/14/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,958	3,056	12,702	885	5,816	24,417	3,337	4,103
This week last year	2,167	2,833	11,760	1,239	5,398	23,397	3,200	4,013
2017 YTD	3,967	6,061	22,754	1,521	11,590	45,893	6,662	7,980
2016 YTD	4,337	5,836	22,388	1,993	10,134	44,688	6,785	8,397
2017 YTD as % of 2016 YTD	91	104	102	76	114	103	98	95
Last 4 weeks as % of 2016*	98	110	106	95	119	108	114	106
Last 4 weeks as % of 3-yr avg.**	91	96	116	87	104	106	95	94
Total 2016	95,179	151,005	590,779	45,246	300,836	1,183,045	194,024	234,738

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

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

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

Figure 3

Total Weekly U.S. Class I Railroad Grain Car Loadings

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

For the week ending: 1/19/2017		Delivery period							
		Feb-17	Feb-16	Mar-17	Mar-16	Apr-17	Apr-16	May-17	May-16
BNSF ³	COT grain units	202	no bids	0	no bids	0	no bids	no bids	no bids
	COT grain single-car ⁵	339	0	203	0	41	no bids	37	22
UP ⁴	GCAS/Region 1	23	no bids	no bids	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	163	no bids	no bids	no bids	no offer	no bids	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

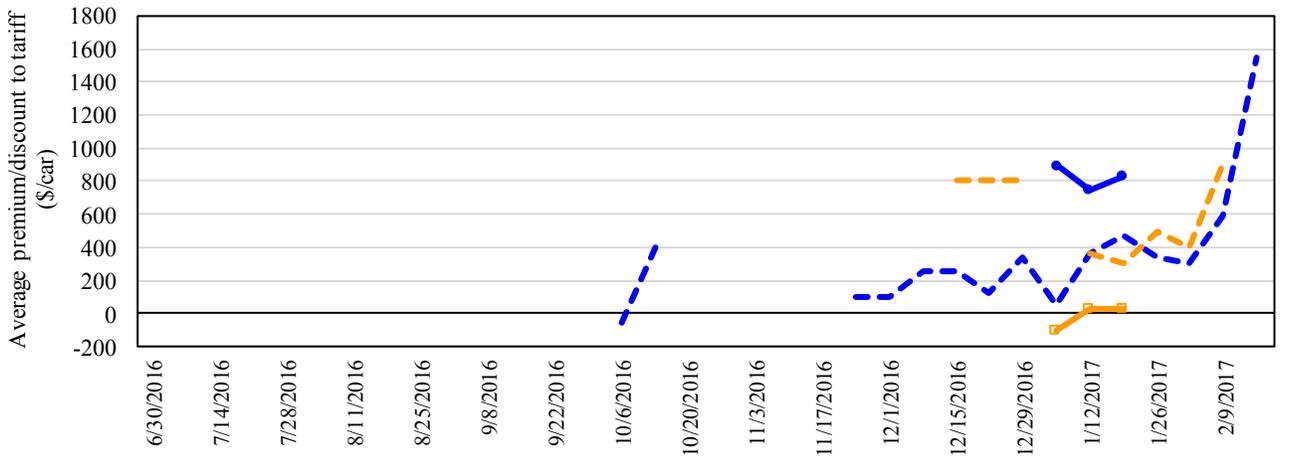
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

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

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



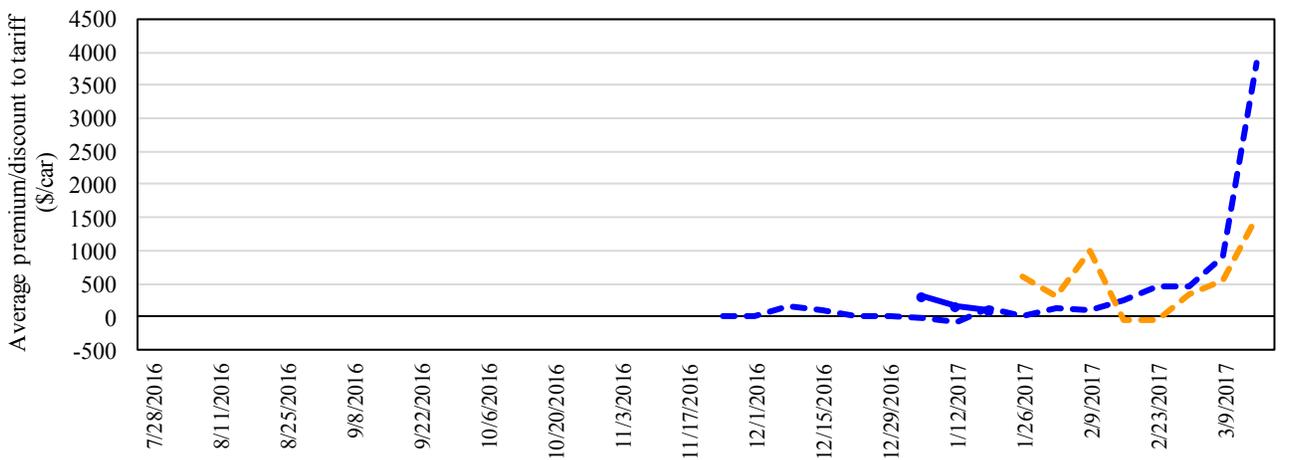
	1/19/2017	BNSF	UP
Non-Shuttle	\$0	\$63	
Shuttle	\$1,200	\$467	

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

Average Non-shuttle bids/offers are unchanged this week, and are at the peak.
 Average Shuttle bids/offers rose \$83 this week and are \$67 below the peak.

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

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



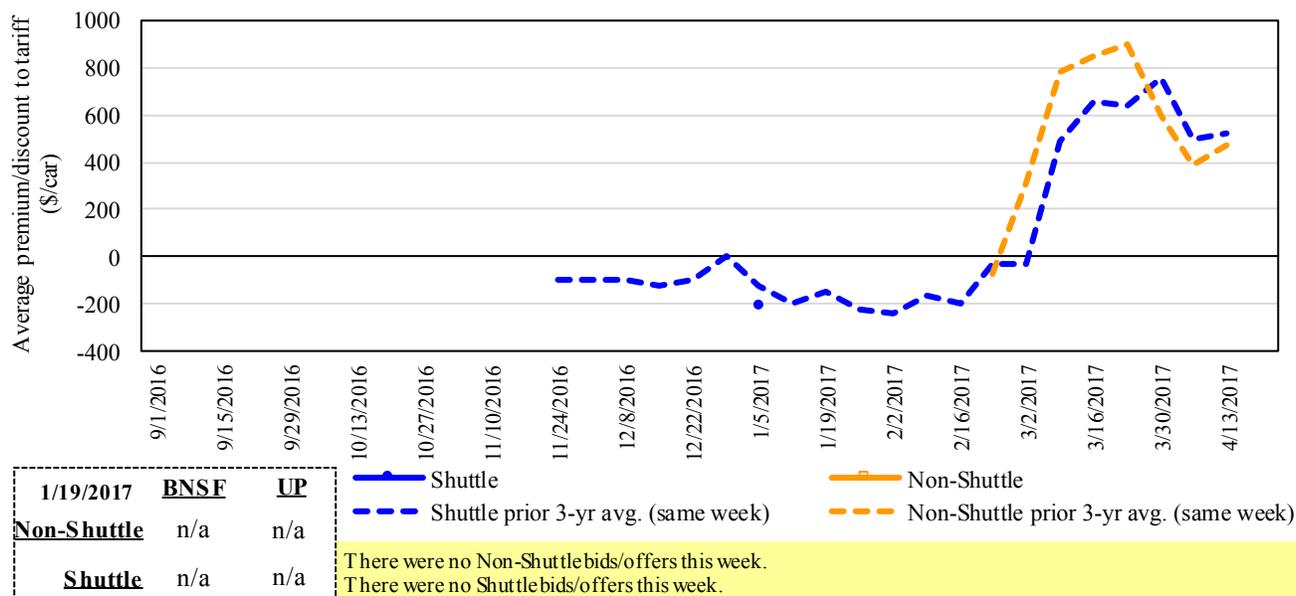
	1/19/2017	BNSF	UP
Non-Shuttle	n/a	n/a	
Shuttle	n/a	\$100	

—●— 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 \$50 this week and are \$200 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 2017, 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					
		1/19/2017	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Non-shuttle	BNSF-GF	0	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	25	n/a	n/a	n/a	n/a	n/a
	UP-Pool	63	n/a	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	163	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	1200	n/a	n/a	n/a	n/a	n/a
	Change from last week	200	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	1158	n/a	n/a	n/a	n/a	n/a
	UP-Pool	467	100	n/a	n/a	n/a	n/a
	Change from last week	(33)	(50)	n/a	n/a	n/a	n/a
	Change from same week 2016	534	250	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

January, 2017	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,770	\$35	\$37.79	\$1.03	4
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	-\$3	\$41.11	\$1.12	16
	Wichita, KS	Los Angeles, CA	\$6,950	-\$15	\$68.86	\$1.87	0
	Wichita, KS	New Orleans, LA	\$4,408	\$62	\$44.39	\$1.21	4
	Sioux Falls, SD	Galveston-Houston, TX	\$6,686	-\$13	\$66.27	\$1.80	3
	Northwest KS	Galveston-Houston, TX	\$4,676	\$68	\$47.11	\$1.28	3
	Amarillo, TX	Los Angeles, CA	\$4,875	\$95	\$49.35	\$1.34	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$70	\$37.25	\$0.95	0
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0
	Des Moines, IA	Davenport, IA	\$2,258	\$15	\$22.57	\$0.57	4
	Indianapolis, IN	Atlanta, GA	\$5,191	\$0	\$51.55	\$1.31	4
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	0
	Des Moines, IA	Little Rock, AR	\$3,534	\$44	\$35.53	\$0.90	2
	Des Moines, IA	Los Angeles, CA	\$5,202	\$128	\$52.93	\$1.34	3
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,639	\$37	\$36.51	\$0.99	-2
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	0
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	0
	Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	0
Champaign-Urbana, IL	New Orleans, LA	\$4,495	\$70	\$45.34	\$1.23	2	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,953	-\$9	\$39.17	\$1.07	0
	Wichita, KS	Galveston-Houston, TX	\$4,071	-\$7	\$40.36	\$1.10	4
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	-\$15	\$55.57	\$1.51	0
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	-\$16	\$58.74	\$1.60	0
	Northwest KS	Portland, OR	\$5,643	\$112	\$57.15	\$1.56	3
Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$19	\$49.47	\$1.26	0
	Sioux Falls, SD	Tacoma, WA	\$4,960	-\$17	\$49.09	\$1.25	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$70	\$35.27	\$0.90	0
	Lincoln, NE	Galveston-Houston, TX	\$3,700	-\$10	\$36.64	\$0.93	3
	Des Moines, IA	Amarillo, TX	\$3,895	\$55	\$39.23	\$1.00	2
	Minneapolis, MN	Tacoma, WA	\$5,000	-\$18	\$49.47	\$1.26	0
	Council Bluffs, IA	Stockton, CA	\$4,740	-\$19	\$46.88	\$1.19	2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	-\$17	\$55.44	\$1.51	2
	Minneapolis, MN	Portland, OR	\$5,650	-\$19	\$55.92	\$1.52	2
	Fargo, ND	Tacoma, WA	\$5,500	-\$15	\$54.47	\$1.48	2
	Council Bluffs, IA	New Orleans, LA	\$4,525	\$81	\$45.74	\$1.24	2
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0
	Grand Island, NE	Portland, OR	\$5,460	\$115	\$55.36	\$1.51	2

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

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

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

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

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel surcharge per car ²	Tariff plus surcharge per:		Percent change ⁴ Y/Y
					metric ton ³	bushel ³	
Date: January, 2017							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,638	\$49	\$68.32	\$1.86	2
	KS	Guadalajara, JA	\$7,180	\$260	\$76.01	\$2.07	5
	TX	Salinas Victoria, NL	\$4,258	\$29	\$43.80	\$1.19	3
Corn	IA	Guadalajara, JA	\$8,187	\$203	\$85.73	\$2.18	-1
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	-3
	NE	Queretaro, QA	\$7,909	\$99	\$81.82	\$2.08	1
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$97	\$75.25	\$1.91	1
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	-1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$217	\$90.56	\$2.46	1
	NE	Guadalajara, JA	\$8,942	\$217	\$93.58	\$2.54	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5
	KS	Torreon, CU	\$7,489	\$140	\$77.95	\$2.12	1
Sorghum	NE	Celaya, GJ	\$7,164	\$179	\$75.02	\$1.90	-2
	KS	Queretaro, QA	\$7,608	\$61	\$78.35	\$1.99	0
	NE	Salinas Victoria, NL	\$6,213	\$49	\$63.98	\$1.62	1
	NE	Torreon, CU	\$6,607	\$125	\$68.79	\$1.75	-3

¹Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

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

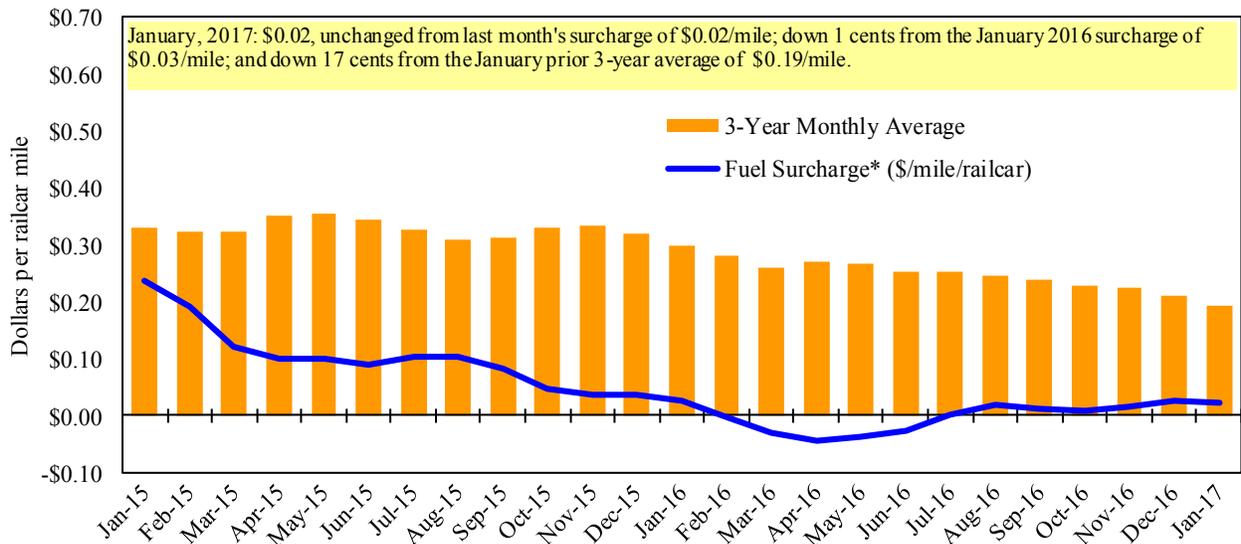
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹



¹ Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

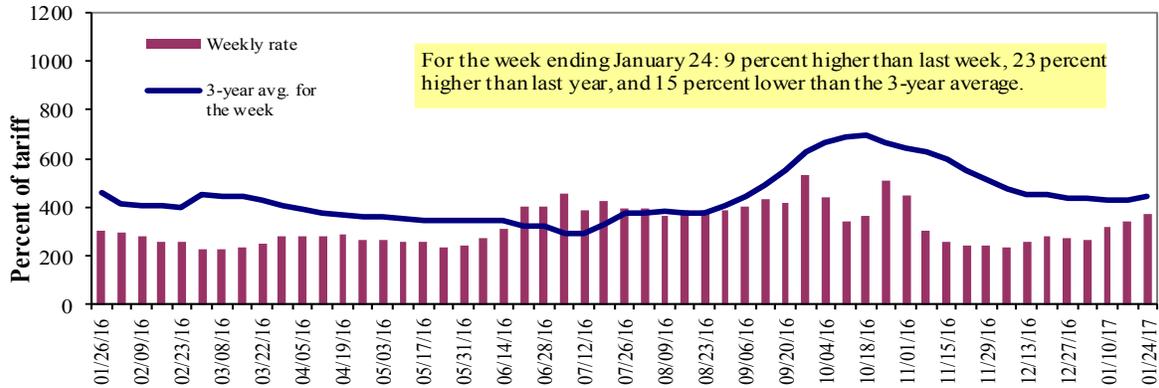
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.
Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	1/24/2017	-	-	375	300	300	300	250
	1/17/2017	-	-	345	215	235	235	193
\$/ton	1/24/2017	-	-	17.40	11.97	14.07	12.12	7.85
	1/17/2017	-	-	16.01	8.58	11.02	9.49	6.06
Current week % change from the same week:								
	Last year	-	-	23	52	48	46	47
	3-year avg. ²	-	-	-15	-8	-13	-13	10
Rate¹	February	-	-	305	220	233	233	195
	April	333	280	273	203	198	198	170

flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

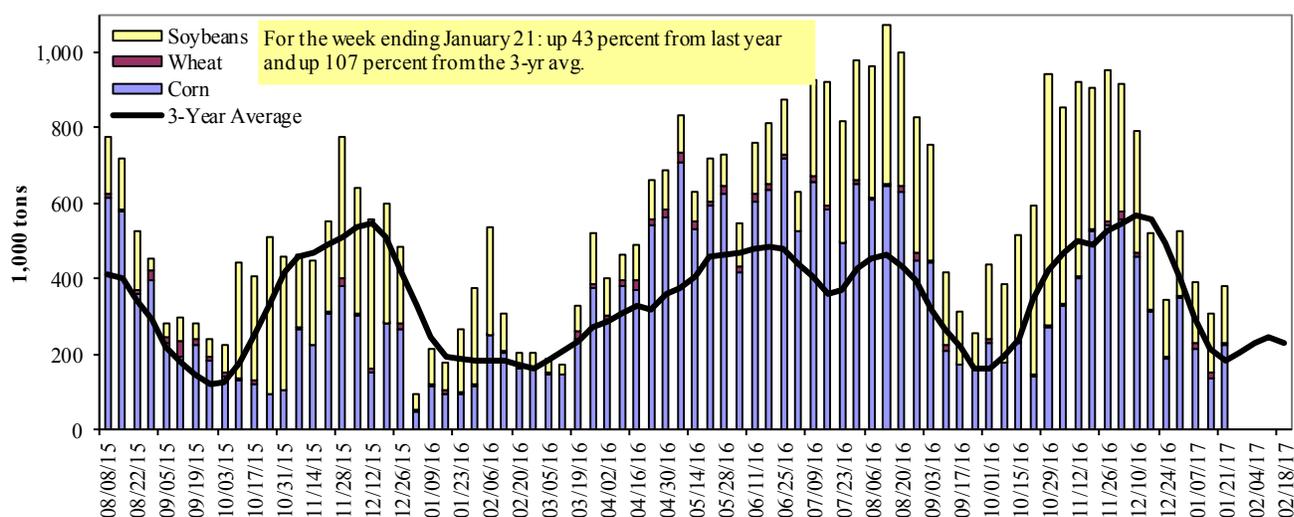
(Rate * 1976 tariff benchmark rate per ton)/100

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



Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 1/21/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	5	0	2	0	6
Alton, IL (L26)	223	3	139	11	376
Granite City, IL (L27)	225	5	152	11	392
Illinois River (L8)	206	3	73	0	283
Ohio River (L52)	121	0	159	0	280
Arkansas River (L1)	0	21	43	0	64
Weekly total - 2017	346	26	354	11	736
Weekly total - 2016	245	9	350	2	606
2017 YTD ¹	872	113	1,049	55	2,089
2016 YTD	739	36	852	2	1,629
2017 as % of 2016 YTD	118	314	123	2,884	128
Last 4 weeks as % of 2016 ²	149	340	128	2,884	144
Total 2016	24,136	2,030	16,668	344	43,178

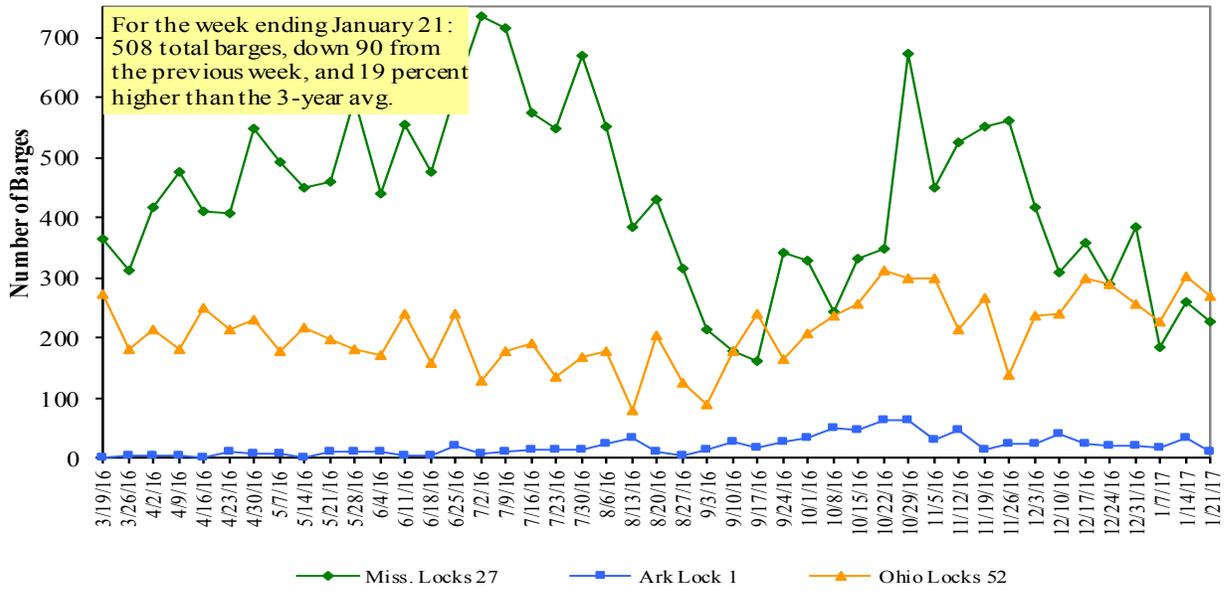
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

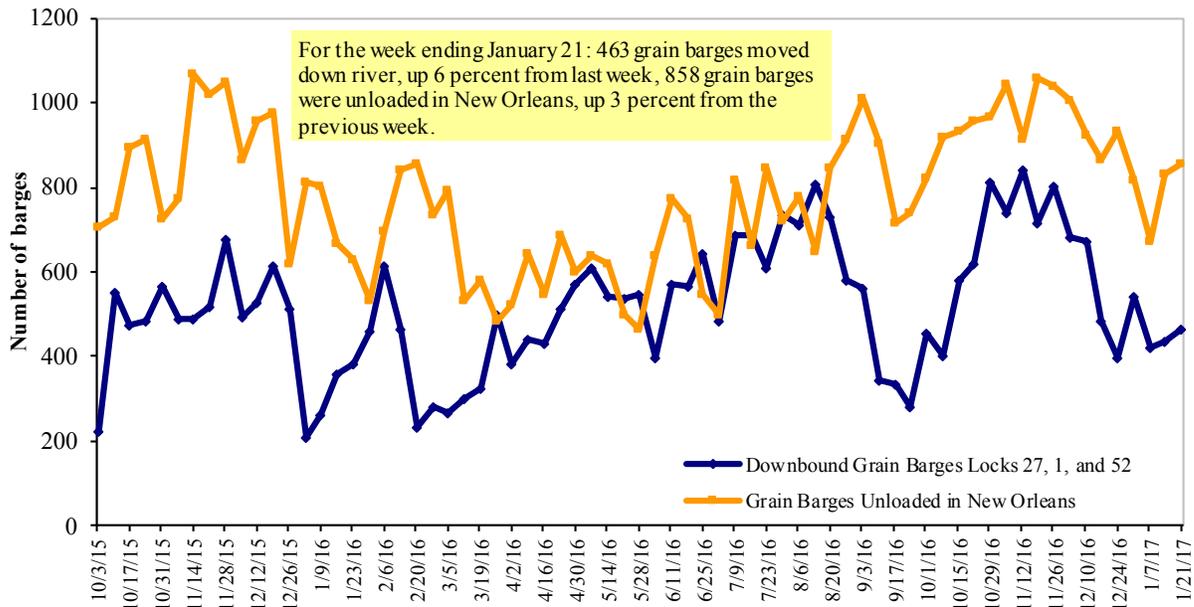
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 01/23/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.627	-0.009	0.487
	New England	2.676	0.001	0.436
	Central Atlantic	2.784	-0.020	0.520
	Lower Atlantic	2.507	-0.004	0.482
II	Midwest ²	2.512	-0.002	0.525
III	Gulf Coast ³	2.414	-0.015	0.457
IV	Rocky Mountain	2.532	-0.006	0.517
V	West Coast	2.846	-0.009	0.521
	West Coast less California	2.750	-0.005	0.590
	California	2.923	-0.014	0.464
Total	U.S.	2.569	-0.016	0.498

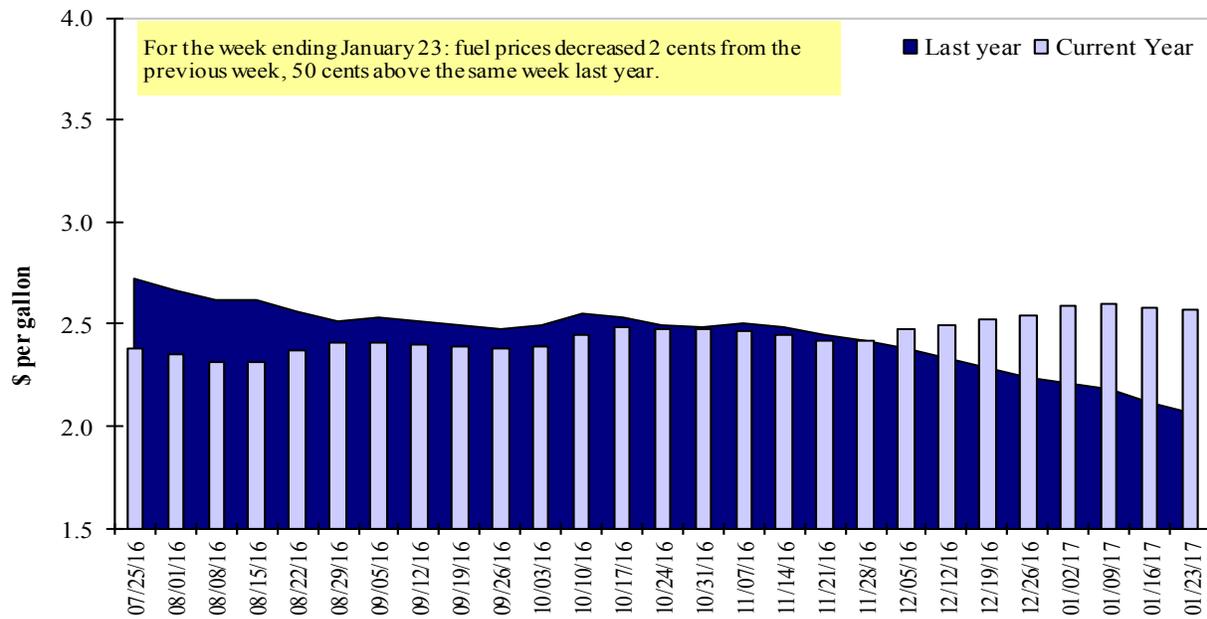
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
1/12/2017	1,967	618	2,427	1,075	139	6,226	19,770	13,187	39,183
This week year ago	1,158	634	1,417	932	81	4,222	11,669	10,102	25,992
Cumulative exports-marketing year²									
2016/17 YTD	6,769	1,283	4,544	2,499	263	15,357	17,934	36,115	69,405
2015/16 YTD	3,460	2,172	3,875	2,146	542	12,194	10,611	29,884	52,689
YTD 2016/17 as % of 2015/16	196	59	117	116	49	126	169	121	132
Last 4 wks as % of same period 2015/16	175	98	171	113	151	137	167	144	153
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,487
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155

¹ Current unshipped (outstanding) export sales to date

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

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

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

Table 13

Top 5 Importers¹ of U.S. Corn

For the week ending 1/12/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	5,715	3,485	64	11,284
Mexico	10,063	8,553	18	11,204
Korea	3,123	596	424	3,931
Colombia	2,338	2,135	9	4,134
Taiwan	1,943	398	389	1,912
Top 5 Importers	23,182	15,167	53	32,465
Total US corn export sales	37,704	22,279	69	46,633
% of Projected	67%	46%		
Change from prior week	1,368	1,827		
Top 5 importers' share of U.S. corn export sales	61%	68%		70%
USDA forecast, January 2017	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, January 2017	135,255	132,233	2	

(n) indicates negative number.

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

² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>. Total commitments change from prior week could include revisions from previous week's outstanding sales or accumulated sales.

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 1/12/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	32,323	24,892	30	29,033
Mexico	2,259	1,976	14	3,295
Indonesia	1,171	736	59	2,065
Japan	1,401	1,209	16	1,994
Taiwan	934	718	30	1,226
Top 5 importers	38,088	29,530	29	37,614
Total US soybean export sales	49,301	39,986	23	48,389
% of Projected	88%	76%		
Change from prior week	980	2,036		
Top 5 importers' share of U.S. soybean export sales	77%	74%		78%
USDA forecast, January 2017	55,858	52,752	6	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>. Total commitments change from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 1/12/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,034	1,794	13	2,743
Mexico	2,241	1,748	28	2,660
Nigeria	1,130	1,324	(15)	1,978
Philippines	2,046	1,776	15	2,156
Brazil	1,107	369	200	2,076
Korea	1,101	997	10	1,170
Taiwan	845	829	2	1,005
Indonesia	708	291	143	776
Colombia	647	516	25	679
Thailand	610	388	57	618
Top 10 importers	12,469	10,032	24	15,861
Total US wheat export sales	21,583	16,416	31	24,485
% of Projected	81%	78%		
Change from prior week	243	637		
Top 10 importers' share of U.S. wheat export sales	58%	61%		65%
USDA forecast, January 2017	26,567	21,117	26	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>. Total commitments change from prior week could include revisions from the previous week's outstanding and/or accumulated sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port Regions	For the Week Ending 01/19/17	Previous Week ¹	Current Week as % of Previous	2017 YTD*	2016 YTD*	2017 YTD as % of 2016 YTD	Last 4-weeks as % of:		2016 Total ²
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	146	104	141	393	633	62	65	75	12,325
Corn	258	253	102	685	238	287	367	287	12,009
Soybeans	206	354	58	839	960	87	87	89	14,447
Total	611	710	86	1,916	1,832	105	105	109	38,782
Mississippi Gulf									
Wheat	77	55	140	164	155	106	103	72	3,480
Corn	563	492	114	1,392	1,132	123	125	114	31,420
Soybeans	939	882	106	2,543	2,537	100	101	105	35,278
Total	1,579	1,429	110	4,099	3,825	107	108	106	70,178
Texas Gulf									
Wheat	58	173	33	260	79	330	363	190	6,019
Corn	28	31	89	85	32	265	265	164	1,669
Soybeans	0	0	n/a	0	63	0	0	0	1,105
Total	85	204	42	346	174	199	237	117	8,792
Interior									
Wheat	9	74	13	123	78	158	199	225	1,543
Corn	93	105	88	279	297	94	103	107	7,197
Soybeans	97	117	83	275	217	127	141	113	4,577
Total	199	296	67	676	591	114	128	121	13,317
Great Lakes									
Wheat	0	0	n/a	0	0	n/a	n/a	n/a	1,186
Corn	0	0	n/a	0	0	n/a	n/a	n/a	584
Soybeans	0	0	n/a	0	0	n/a	n/a	0	910
Total	0	0	n/a	0	0	n/a	n/a	0	2,681
Atlantic									
Wheat	0	0	n/a	0	30	0	0	0	315
Corn	0	0	n/a	0	0	n/a	n/a	0	294
Soybeans	52	141	37	204	217	94	92	98	2,269
Total	52	141	37	204	247	83	84	93	2,878
U.S. total from ports²									
Wheat	291	406	72	940	975	96	101	100	24,867
Corn	941	881	107	2,440	1,699	144	152	137	53,173
Soybeans	1,295	1,494	87	3,860	3,993	97	98	98	58,587
Total	2,527	2,781	91	7,240	6,668	109	111	108	136,627

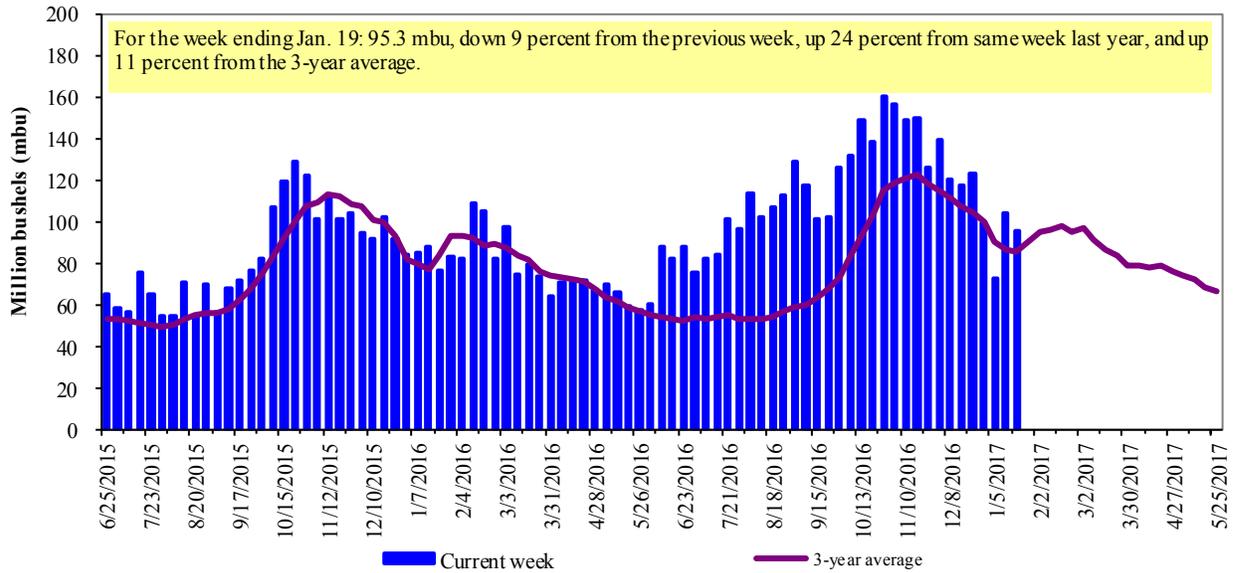
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 58 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2016.

Figure 14

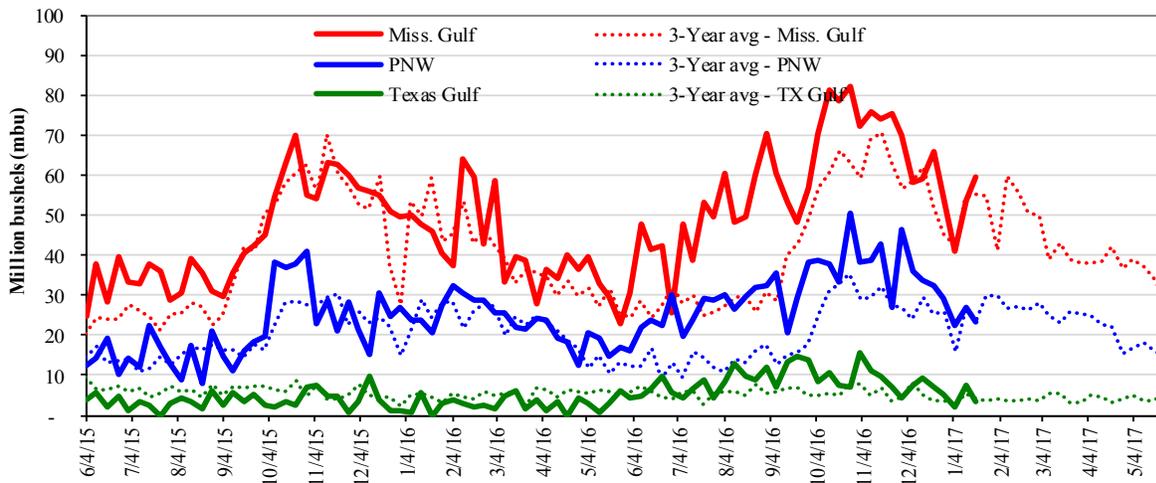
U.S. grain inspected for export (wheat, corn, and soybeans)



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)
 Note: 3-year average consists of 4-week running average

Figure 15

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



Week ending 01/19/17 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf: 59.5	Last Week:	up 11	down 58	up 2	down 14
PNW: 23.1	Last Year (same week):	up 30	n/a	up 37	up 13
Texas Gulf: 3.2	3-yr avg. (4-wk. mov. Avg):	up 21	down 17	up 18	unchanged

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

Ocean Transportation

Table 17

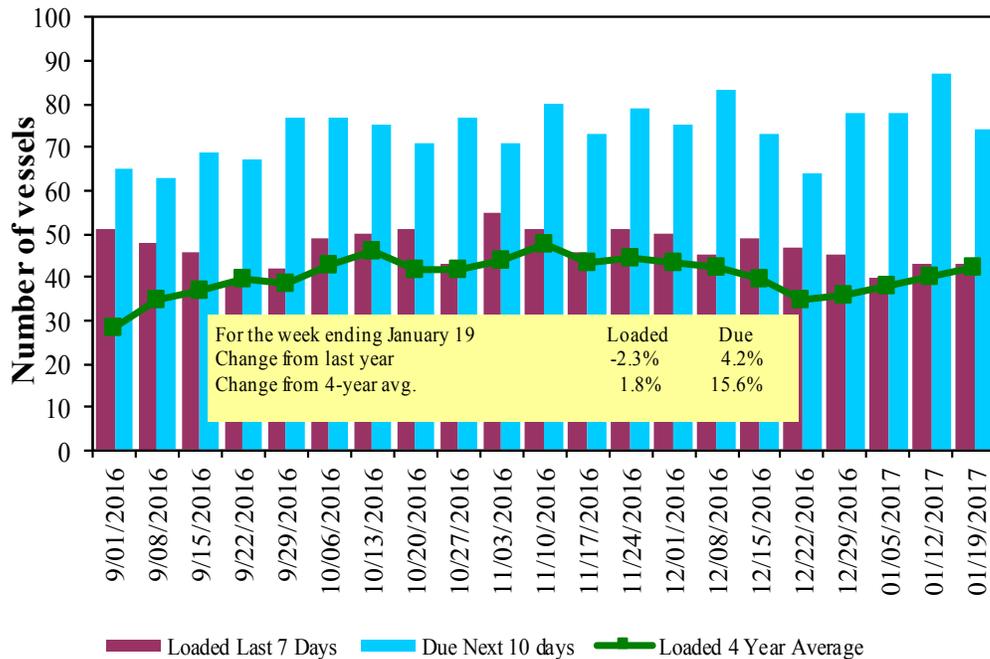
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
1/19/2017	64	43	74	28	n/a
1/12/2017	54	43	87	26	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg.	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

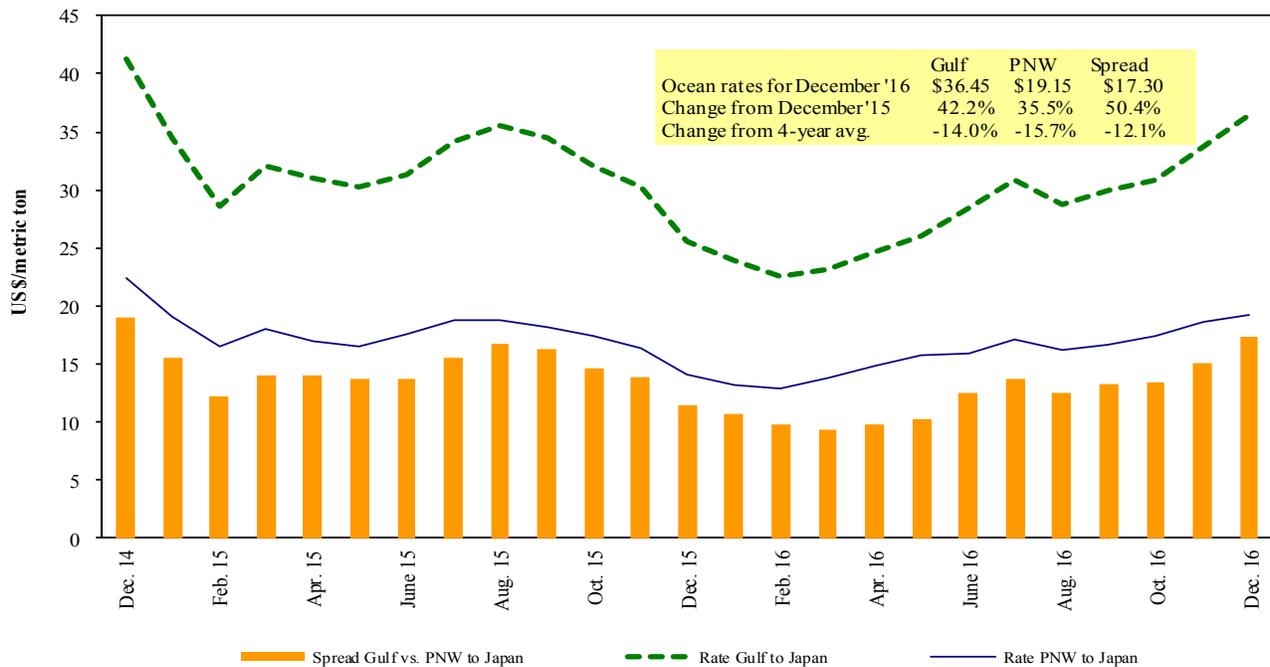
U.S. Gulf Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 1/21/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 15/25	55,000	34.00
U.S. Gulf	China	Heavy Grain	Dec 19/24	66,000	33.90
U.S. Gulf	China	Heavy Grain	Dec 15/24	65,000	34.50
U.S. Gulf	China	Heavy Grain	Dec 14/20	53,000	34.00
U.S. Gulf	China	Heavy Grain	Dec 12/20	63,000	36.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	63,000	35.75
U.S. Gulf	China	Heavy Grain	Dec 5/15	60,000	35.75
U.S. Gulf	China	Heavy Grain	Dec 1/10	60,000	35.35
U.S. Gulf	China	Heavy Grain	Nov 20/30	50,000	31.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	50,000	29.00
U.S. Gulf	Kenya	Sorghum	Jan 5/15	23,420	56.75
PNW	Bangladesh	Wheat	Dec 1/10	12,500	160.33*
Vancouver	China	Heavy Grain	Nov 1/10	50,000	31.50
PNW	Bangladesh	Wheat	Nov 1/10	12,500	163.55*
Brazil	China	Heavy Grain	Feb 8/18	60,000	23.85
Brazil	China	Soybeans	Feb 1/10	60,000	24.20
Brazil	South Korea	Heavy Grain	Mar 15/Apr 15	65,000	23.50
EC S, America	China	Heavy Grain	Feb 1/10	60,000	24.00
River Plate	South Africa	Soybeans	Nov 1/14	25,000	24.00

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

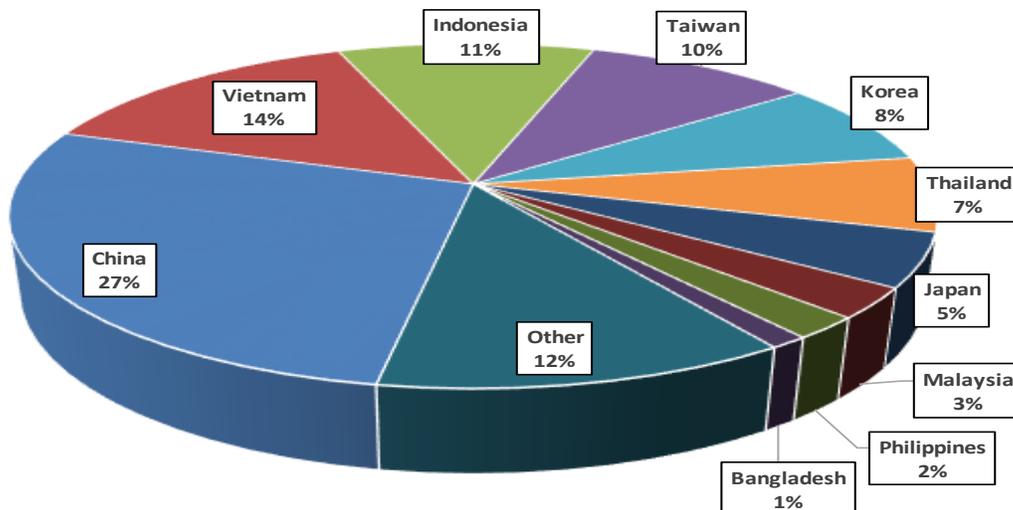
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Source: Maritime Research Inc. (www.maritime-research.com)

In 2015, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 64 percent of U.S. waterborne grain exports in 2015 went to Asia, of which 12 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, January-October 2016

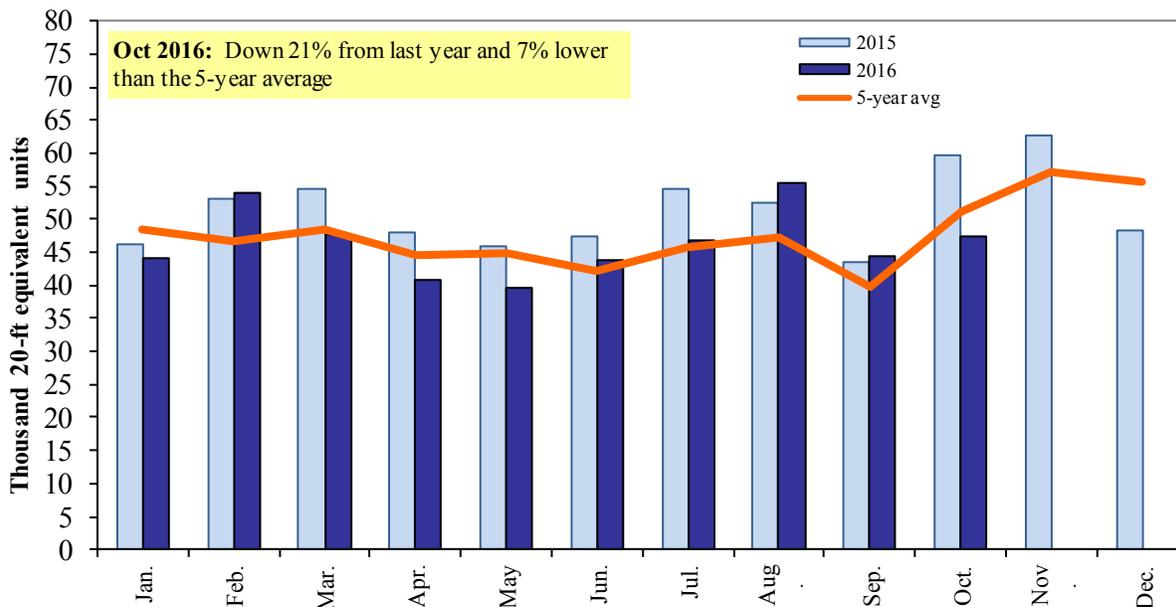


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

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

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