



Grain Transportation Report

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

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December 29, 2016

WEEKLY HIGHLIGHTS

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FMC Allows THE Alliance to Become Effective

On December 14, the Federal Maritime Commission (FMC) voted to allow the most recent ocean container carrier alliance called the Transport High Efficiency Alliance (THE Alliance) to become effective December 19. FMC made no Request for Additional Information, clearing the way for the agreement to come into force within the initial 45-day review period. This FMC action enables ocean carriers Hapag-Lloyd, K line, MOL, NYK line, and Yang Ming Line to “charter and exchange space on one another’s vessels and to rationalize, coordinate and cooperate...in order to improve efficiency, save costs, and provide premium service.” THE Alliance is expected to involve 151 container vessels with capacities ranging from 3,000-14,500 twenty-foot equivalent units. THE Alliance will compete with the existing Ocean Alliance and 2M Alliance. In terms of tonnage, grain, oilseeds, and feed products represented approximately 40 percent of containerized agricultural exports in 2015.

Columbia–Snake River System Out for 14 Weeks of Repairs

The U.S. Army Corps of Engineers (Corps) initiated a plan to close all the navigation locks on the Columbia and Snake Rivers from December 12, 2016, through March 20, 2017. The closure would allow the Corps to conduct critical major repairs, routine maintenance, and improvements. The 14-week-long closure will affect all navigation locks, meaning no traffic will be able to pass during this time. This extended lock outage plan is a coordinated effort between the Corps’ Portland and Walla Walla districts. Building on a successful FY11 extended lock outage, the Corps has again been working closely with key river system stakeholders to enable them to plan ahead for the current shutdown. The Corps goal is to prioritize and accomplish urgently needed lock repairs along the Columbia and Snake Rivers while minimizing the impact lock closures have on river users. To maximize maintenance opportunities at all of the locks, additional work items may be added within the extended-outage schedule, dependent upon available resources. More information about the repairs and improvements to occur during the extended navigation lock outage is available on the [Corps’ webpage](#).

Corn and Wheat Inspections Rose, while Soybeans Declined

For the week ending December 22, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 3.24 million metric tons (mmt), up 3 percent from last week, up 31 percent from the same time last year, and up 25 percent from the prior-3-years average. Total corn and wheat inspections increased compared to the previous week, by 21 and 8 percent, respectively, while soybean inspections decreased 5 percent. Increased Mississippi Gulf inspections accounted for the increase in total corn and wheat, which rose by 47 and 153 percent, respectively, from the previous week in that region. Total Mississippi Gulf inspections rose by 10 percent, while Pacific Northwest (PNW) Inspections fell by 6 percent.

Snapshots by Sector

Export Sales

During the week ending December 15, **unshipped balances** of wheat, corn, and soybeans totaled 43.2 mmt, up 52 percent from the same time last year. Net weekly **wheat export sales** were .298 mmt, down 44 percent from the previous week. Net **corn export sales** were 1.25 mmt, down 17 percent from the previous week, and net **soybean export sales** were 1.81 mmt, down 6 percent from the past week.

Rail

U.S. Class I railroads originated 24,193 **grain carloads** for the week ending December 17, down 2 percent from the previous week, up 5 percent from last year, and up 5 percent from the 3-year average.

Average January shuttle **secondary railcar bids/offers** per car were \$425 above tariff for the week ending December 22, up \$275 from last week, and \$575 higher than last year. There were no non-shuttle secondary railcar bids/offers this week.

Barge

For the week ending December 24, **barge grain movements** totaled 640,124 tons, 16 percent lower than the last week, and down 22 percent from the same period last year.

For the week ending December 24, 397 grain barges **moved down river**, down 18 percent from last week, 932 grain barges were **unloaded in New Orleans**, up 8 percent from the previous week.

Ocean

For the week ending December 22, 47 **ocean-going grain vessels** were loaded in the Gulf, 9 percent more than the same period last year. Sixty-four vessels are expected to be loaded within the next 10 days, 9 percent more than the same period last year.

For the week ending December 22, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$35.50 per metric ton, 3 percent less than the previous week. The cost of shipping from the PNW to Japan was \$18.25 per metric ton, 5 percent less than the previous week.

Fuel

During the week ending December 26, U.S. average **diesel fuel prices** were up 1 cent from the previous week at \$2.54 per gallon, 31 cents higher than the same week last year.

Feature Article/Calendar

To Our Readers:

We sincerely appreciate our readers and their continued support this past year. Following the challenges experienced by the U.S. transportation system in 2014, and subsequent improvement in 2015, 2016 has been a remarkable year for grain exports, transportation, and logistics. Rail and barge grain movements have been strong throughout the year. During the second half of the year, weekly grain carloadings by rail were well above the prior 3-year average, at times reaching near-record weekly levels. As of week 50, total grain barge tonnages in 2016 reached 42 million tons, 19 percent higher than last year's total annual tonnage. Despite an uptick in the ocean freight rates during the year, grain exports and grain loading activities in the U.S. Gulf and the Pacific Northwest (PNW) have been strong throughout the year.

As part of our efforts to keep our readers abreast of current issues, we strived throughout the year to provide timely and insightful analysis relevant to grain transportation in the *Grain Transportation Report (GTR)*. In 2016, we also filed comments with the Surface Transportation Board (STB) concerning revised competitive switching rules and expanding access to rate relief for grain shippers. We always strive for continuous improvement in what we do at the Transportation Services Division. In this endeavor, we are in the process of making the data behind most of the tables and figures in the GTR more user-friendly, insightful, and interactive on our website in 2017.

2016 Agricultural Transportation Overview

Even with record corn and soybean crops, 2016 did not have major transportation problems sometimes associated with large crops. The year was marked by increased export demand and relatively low freight rates in truck, barge, and ocean transportation. Grain rail rates increased, but at a lower rate than in previous years. Key developments and observations in 2016 are highlighted below.

Supply and Demand: In the December *World Agricultural Supply and Demand Estimates* report, USDA projected the 2016/17 production of corn, soybeans, and wheat to reach 21.9 billion bushels (bbu), 10 percent above the previous year. Total grain exports are projected to remain unchanged at 4.3 bbu. Soybean exports are projected to reach 2.1 bbu, up 11 percent from last year while corn exports are expected to reach 2.2 bbu, up 18 percent from the previous year. Projected wheat exports are expected to increase 18 percent, to .975 bbu.

Rail: It has been a strong year for grain rail shipments. While carloadings started the year out normally, beginning in mid-June, the numbers rose significantly higher than recent years. Grain carloadings were well above the prior 3-year average for the remainder of the year. As highlighted in an earlier GTR, carloadings hit a record high during the week ending November 5 at 28,655 carloads, higher than they had been in almost a decade. These high volumes were associated with some increases in outstanding orders (backlogs) and higher auction market prices compared to 2015. However, the levels were much lower than the significant service problems and secondary market price spikes seen in 2013 and 2014.

According to STB service metrics, backlogged car orders for the months of October and November in 2016 were higher than the same months last year, averaging a weekly total of 2,450 cars in 2015 and 3,369 cars in 2016. However, both years were far below the 2014 October and November average weekly total of 18,815 cars. Secondary shuttle bids for service in October averaged \$1,052 in 2016, but only \$490 in 2015. However, again, both years were well below the average shuttle bid for service in October 2014 of \$3,088. The data indicates that 2016 was a year of relative high demand for grain rail service. At the same time, declines in total rail traffic, due primarily to declines in coal shipments, meant that the grain rail supply was capable of handling the high demand without significant issue.

Barge: As of week 51 (December 24), total grain barge tonnages in 2016 reached 42.4 million tons, 20 percent higher than last year's annual total. Furthermore, with one week remaining in the year, the year-to-date cumulative total grain tonnage moved during 2016 is already the highest since 2003, when the annual tons were 42.5 million tons. An additional 121 thousand or more tons for the last week of the year would meet or exceed the 2003 tonnages, however, would not be enough to exceed the 50.8 million tons shipped in 2002. By comparison, last year during the fourth quarter there was only 1 week when the weekly tonnages exceeded 1 million tons, whereas during the current fourth quarter this year, there were seven times when the weekly tonnage exceeded 1 million tons. In addition, there were 6 weeks during July and August when the weekly tonnages exceeded 1 million tons. Despite the strong demand for barge services, barge freight rates have been mostly below average for most of the year, indicating a plentiful supply of barges likely moderated rates. During late September, St. Louis barge rates for export grain peaked at 420 percent of tariff (\$16.76 per ton), 35 percent lower than the 5-year average for late September. Minneapolis- St. Paul barge rates for export grain peaked at 583 percent of tariff (\$36.09 per ton) during late October, 16 percent lower than the 5-year average for comparable period.

Ocean: Ocean freight rates for shipping bulk commodities, including grain, increased during the year due to strong iron ore and grain trade demand, but as of mid-December, rates still remained significantly below the historical highs of 2008 because the bulk shipping market is flooded with excess vessel supply.

Despite the increase in ocean freight rates, ocean-going grain vessel loading activity out of the U.S. Gulf and Pacific Northwest continued to be strong. As of December 15, the Gulf-to-Japan Panamax rate was \$36.75 per metric ton (mt)—46 percent more than the beginning of the year, but 12 percent less than the 4-year average. The Pacific Northwest-to-Japan rate was \$19.25 per mt—up 38 percent from the beginning of the year, but 13 percent less than the 4-year average.

Fuel: In 2016, U.S. on-highway diesel fuel prices hit an annual low of just under \$2 per gallon during the week of February 15. Average U.S. diesel prices had not been below \$2 per gallon since 2005. Prices increased steadily through the end of June then stabilized with a small jump at the end of the year to just over \$2.50 per gallon. However, prices remain well below the 5-year average by more than 90 cents per gallon. Low diesel fuel prices help keep costs low for all modes of transportation as well as on-farm operational costs.

Happy New Year

We are thankful for another great year and look forward to continuing to serve our readers in the years ahead. We sincerely hope the insight and analysis we provide have helped you to make informed transportation and marketing decisions. We thank all industry and government representatives who regularly and voluntarily provide us with the necessary information/data to produce this report. We wish you a healthy and prosperous New Year!

Sincerely,

[The Grain Transportation Report Team](#)

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean		
		Unit	Train	Shuttle	Gulf	Pacific	
12/28/16	170	261		226	152	159	129
12/21/16	170	261		215	154	164	137

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

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

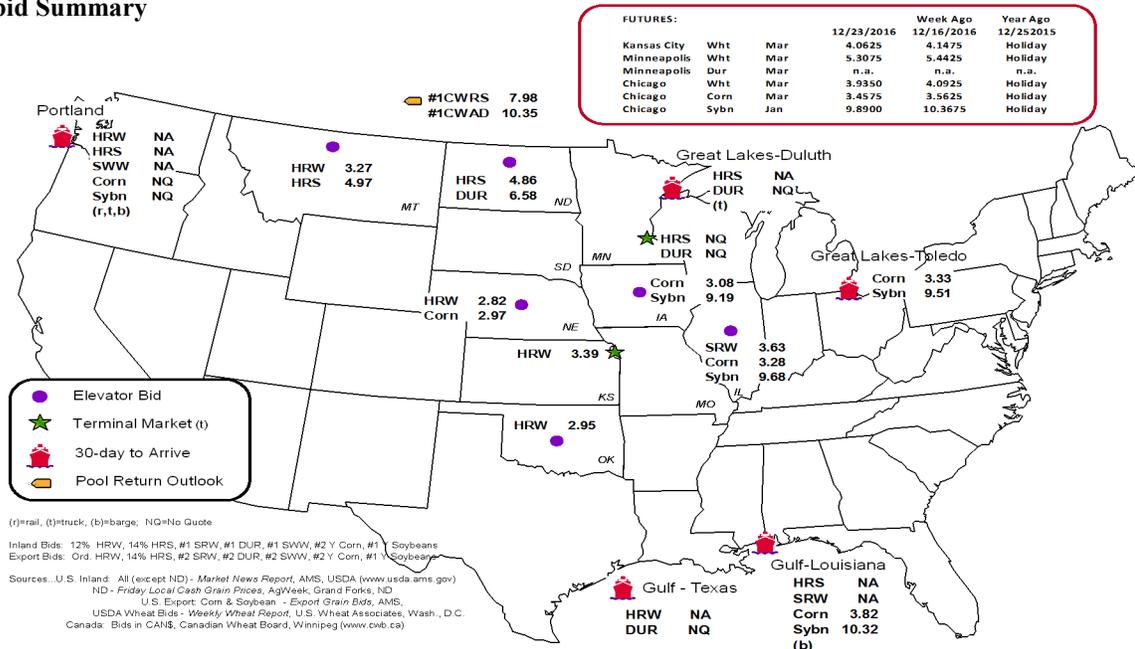
Commodity	Origin--Destination	12/23/2016	12/16/2016
Corn	IL--Gulf	-0.54	-0.53
Corn	NE--Gulf	-0.85	-0.83
Soybean	IA--Gulf	-1.13	-1.18
HRW	KS--Gulf	n/a	-1.97
HRS	ND--Portland	n/a	-2.10

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			
12/21/2016 ^p	733	1,926	6,637	701	9,997	12/17/2016	1,710
12/14/2016 ^r	803	2,373	5,781	972	9,929	12/10/2016	1,600
2016 YTD ^r	36,167	85,600	294,341	27,641	443,749	2016 YTD	105,264
2015 YTD ^r	28,782	59,535	234,571	26,328	349,216	2015 YTD	95,395
2016 YTD as % of 2015 YTD	126	144	125	105	127	% change YTD	110
Last 4 weeks as % of 2015 ²	328	150	124	148	138	Last 4wks % 2015	124
Last 4 weeks as % of 4-year avg. ²	70	180	133	102	128	Last 4wks % 4 yr	122
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

¹ Data is incomplete as it is voluntarily provided

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

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

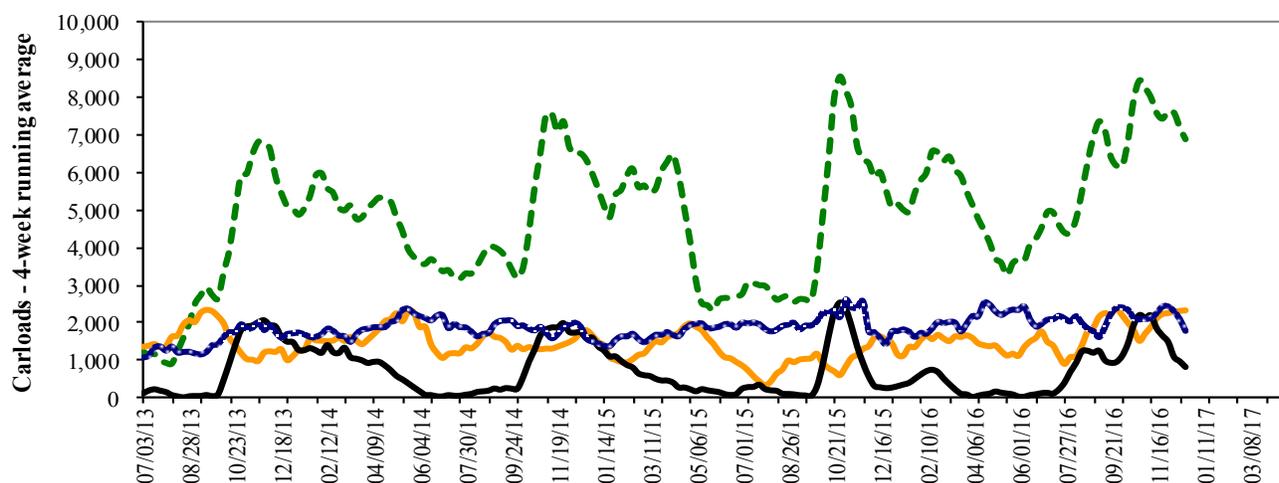
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



--- Pacific Northwest: 4 wks. ending 12/21--up 24% from same period last year; up 33% from 4-year average
--- Texas Gulf: 4 wks. ending 12/21--up 50% from same period last year; up 80% from 4-year average
--- Miss. River: 4 wks. ending 12/21--up 228% from same period last year; down 30% from 4-year average
--- Cross-border: 4 wks. ending 12/17--up 24% from same period last year; up 22% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

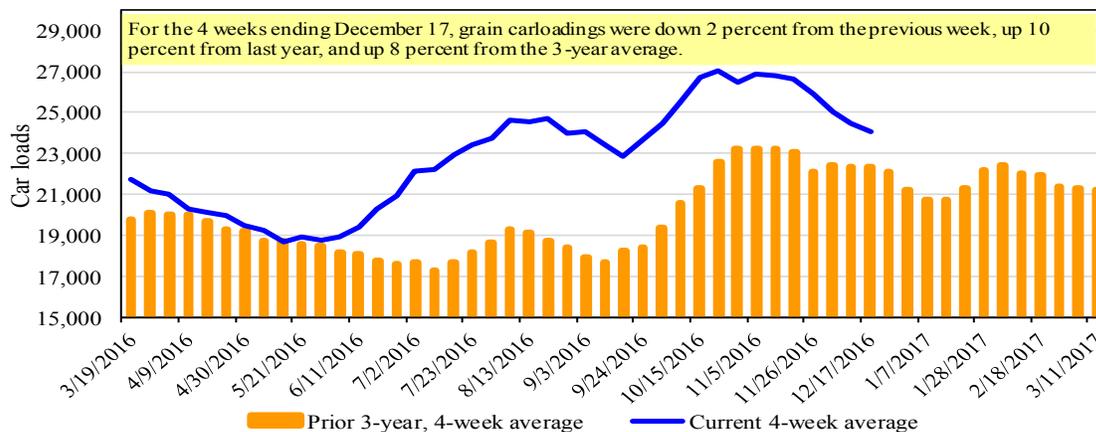
For the week ending: 12/17/2016	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,357	2,549	12,408	698	6,181	24,193	4,001	5,361
This week last year	2,072	3,081	11,336	886	5,596	22,971	4,679	5,662
2016 YTD	91,493	145,608	569,766	43,771	290,045	1,140,683	187,122	226,374
2015 YTD	100,584	144,618	517,247	44,285	259,007	1,065,741	205,727	229,193
2016 YTD as % of 2015 YTD	91	101	110	99	112	107	91	99
Last 4 weeks as % of 2015*	94	111	108	113	120	110	97	98
Last 4 weeks as % of 3-yr avg**	78	96	118	98	110	108	92	96
Total 2015	104,039	149,190	536,173	45,445	267,720	1,102,567	210,896	236,263

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

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

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

Figure 3

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

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

For the week ending: 12/22/2016		Delivery period							
		Jan-17	Jan-16	Feb-17	Feb-16	Mar-17	Mar-16	Apr-17	Apr-16
BNSF ³	COT grain units	34	no bids	6	no bids	3	no bids	no bids	no bids
	COT grain single-car ⁵	105	no bids	67	no bids	24	no bids	6	no bids
UP ⁴	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	no bids	no offer	no bids	n/a	n/a

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

² Average premium/discount to tariff, last auction

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

⁴ UP - GCAS = Grain Car Allocation System

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

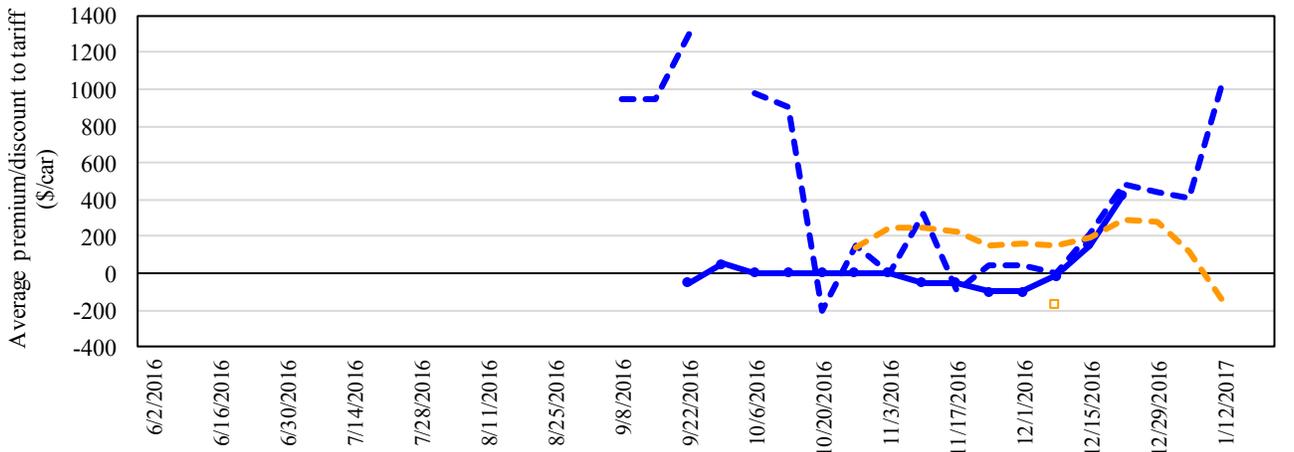
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

⁵ Range 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 January 2017, Secondary Market

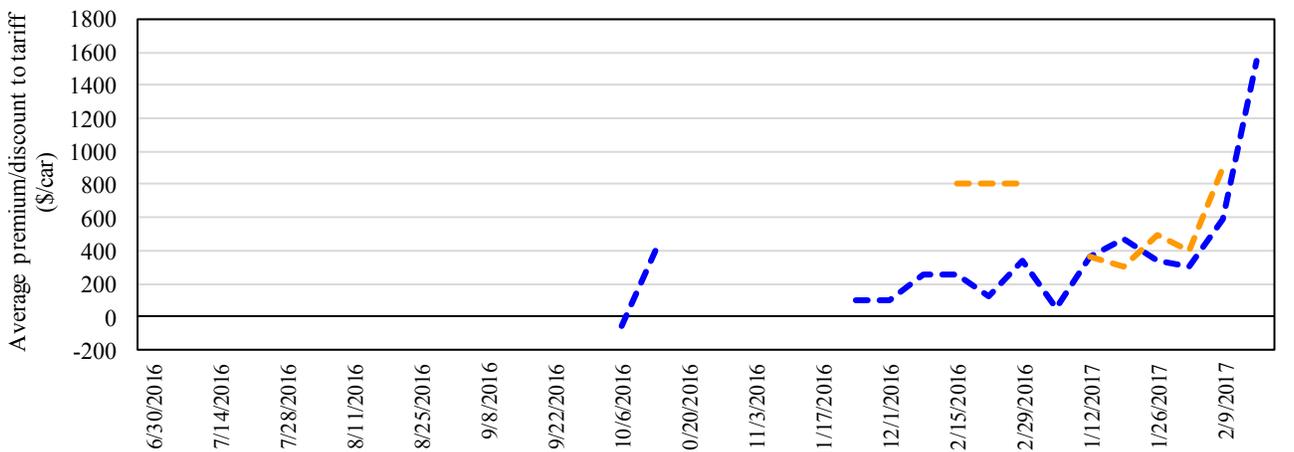


12/22/2016	BNSF	UP	Shuttle	Non-Shuttle
Non-Shuttle	n/a	n/a		
Shuttle	\$900	-\$50		

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers rose \$275 this week and are at the peak.

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

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

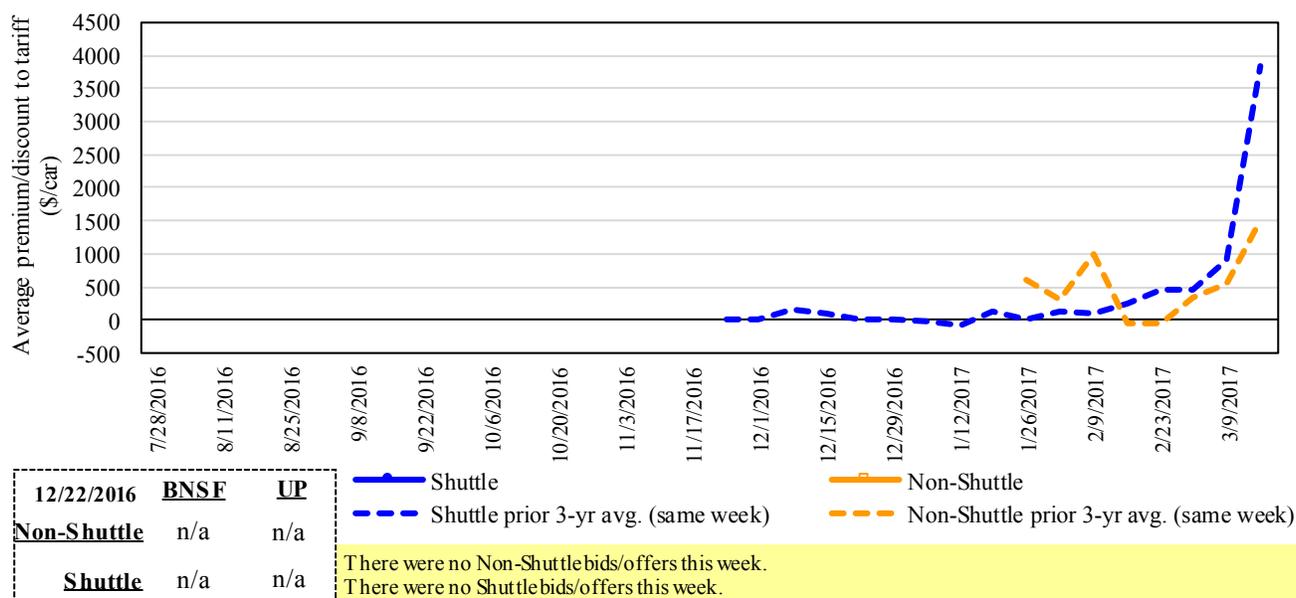


12/22/2016	BNSF	UP	Shuttle	Non-Shuttle
Non-Shuttle	n/a	n/a		
Shuttle	n/a	n/a		

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

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

Figure 6
Bids/Offers for Railcars to be Delivered in March 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					
		Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
12/22/2016							
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 2015	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 2015	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	900	n/a	n/a	n/a	n/a	n/a
	Change from last week	600	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	1100	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(50)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(50)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2015	50	n/a	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

December, 2016	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	\$40	\$37.84	\$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	\$71	\$44.48	\$1.21	4
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$13	\$64.28	\$1.75	0
	Northwest KS	Galveston-Houston, TX	\$4,676	\$78	\$47.21	\$1.28	3
	Amarillo, TX	Los Angeles, CA	\$4,875	\$109	\$49.49	\$1.35	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$80	\$37.35	\$0.95	0
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0
	Des Moines, IA	Davenport, IA	\$2,258	\$17	\$22.59	\$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	\$50	\$35.59	\$0.90	2
	Des Moines, IA	Los Angeles, CA	\$5,202	\$146	\$53.11	\$1.35	3
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,639	\$45	\$36.58	\$1.00	-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	\$80	\$45.44	\$1.24	2	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,953	-\$9	\$39.17	\$1.07	0
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$7	\$38.37	\$1.04	-2
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	-\$15	\$55.57	\$1.51	-1
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	-\$16	\$58.74	\$1.60	-1
	Northwest KS	Portland, OR	\$5,643	\$128	\$57.31	\$1.56	3
Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$19	\$49.47	\$1.26	-1
	Sioux Falls, SD	Tacoma, WA	\$4,960	-\$17	\$49.09	\$1.25	-1
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$80	\$35.37	\$0.90	0
	Lincoln, NE	Galveston-Houston, TX	\$3,700	-\$10	\$36.64	\$0.93	2
	Des Moines, IA	Amarillo, TX	\$3,895	\$63	\$39.30	\$1.00	2
	Minneapolis, MN	Tacoma, WA	\$5,000	-\$18	\$49.47	\$1.26	-1
	Council Bluffs, IA	Stockton, CA	\$4,740	-\$19	\$46.88	\$1.19	1
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	-\$17	\$55.44	\$1.51	1
	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	\$93	\$45.86	\$1.25	2
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0
Grand Island, NE	Portland, OR	\$5,460	\$131	\$55.52	\$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: December, 2016							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,596	\$56	\$67.97	\$1.85	1
	KS	Guadalajara, JA	\$7,077	\$143	\$73.77	\$2.01	1
	TX	Salinas Victoria, NL	\$4,197	\$32	\$43.21	\$1.17	1
Corn	IA	Guadalajara, JA	\$8,187	\$127	\$84.95	\$2.16	-2
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	-4
	NE	Queretaro, QA	\$7,909	\$105	\$81.89	\$2.08	0
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$102	\$75.31	\$1.91	0
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	-1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$131	\$89.69	\$2.44	0
	NE	Guadalajara, JA	\$8,942	\$136	\$92.75	\$2.52	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-6
	KS	Torreon, CU	\$7,489	\$96	\$77.49	\$2.11	1
Sorghum	NE	Celaya, GJ	\$7,164	\$117	\$74.39	\$1.89	-3
	KS	Queretaro, QA	\$7,608	\$70	\$78.44	\$1.99	0
	NE	Salinas Victoria, NL	\$6,213	\$56	\$64.05	\$1.63	0
	NE	Torreon, CU	\$6,607	\$90	\$68.43	\$1.74	-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

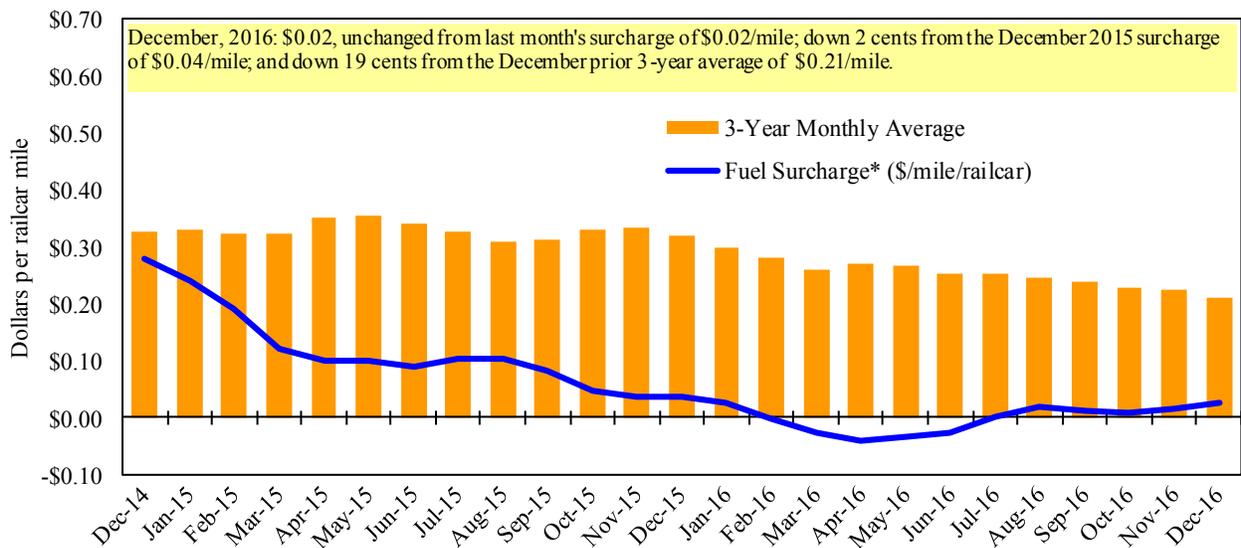
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

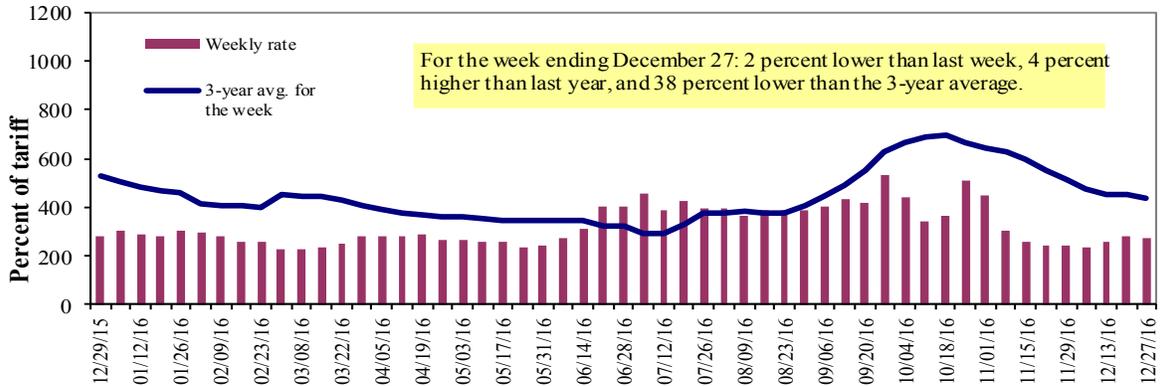
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	12/27/2016	-	-	273	185	213	213	165
	12/20/2016	-	-	278	188	220	220	168
\$/ton	12/27/2016	-	-	12.67	7.38	9.99	8.61	5.18
	12/20/2016	-	-	12.90	7.50	10.32	8.89	5.28
Current week % change from the same week:								
	Last year	-	-	-4	-	1	1	-3
	3-year avg. ²	-	-	-38	-40	-41	-41	-35
Rate¹	January	-	-	273	185	210	210	163
	March	-	278	255	185	195	195	155

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.

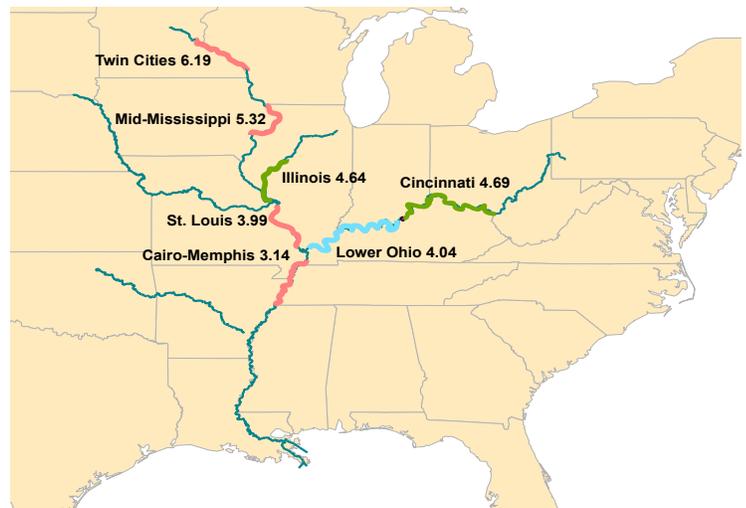
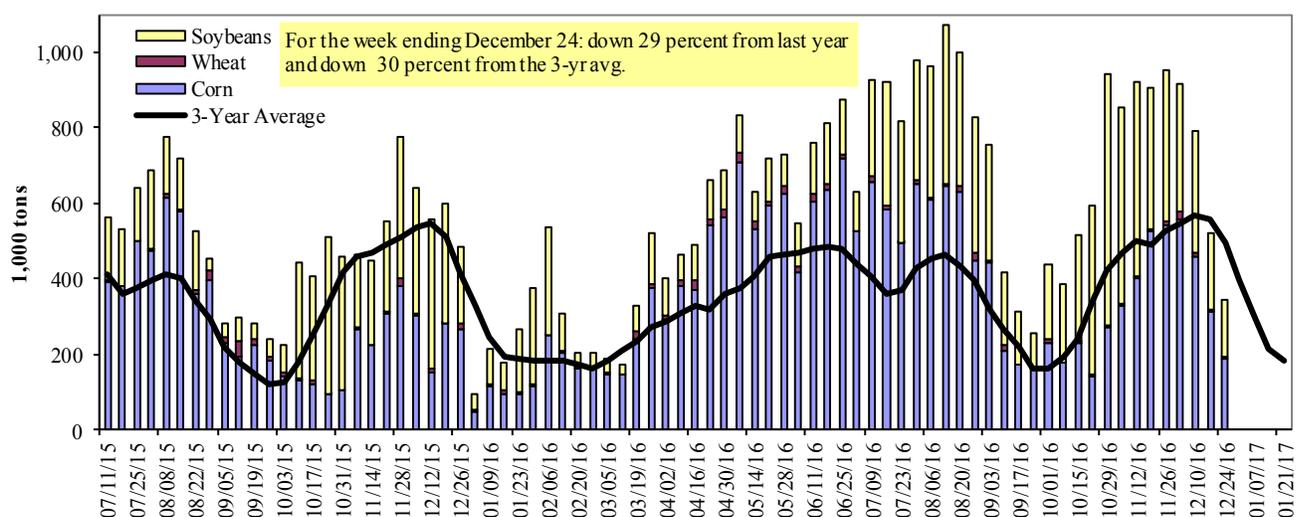


Figure 10

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 12/24/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	21	0	8	0	29
Alton, IL (L26)	180	6	138	0	324
Granite City, IL (L27)	186	6	151	0	343
Illinois River (L8)	183	6	68	0	257
Ohio River (L52)	39	15	167	9	230
Arkansas River (L1)	0	14	53	0	67
Weekly total - 2016	226	35	371	9	640
Weekly total - 2015	355	30	429	2	816
2016 YTD ¹	23,721	1,998	16,341	344	42,405
2015 YTD	19,091	1,678	13,968	359	35,096
2016 as % of 2015 YTD	124	119	117	96	121
Last 4 weeks as % of 2015 ²	133	142	85	93	104
Total 2015	19,215	1,686	14,191	359	35,451

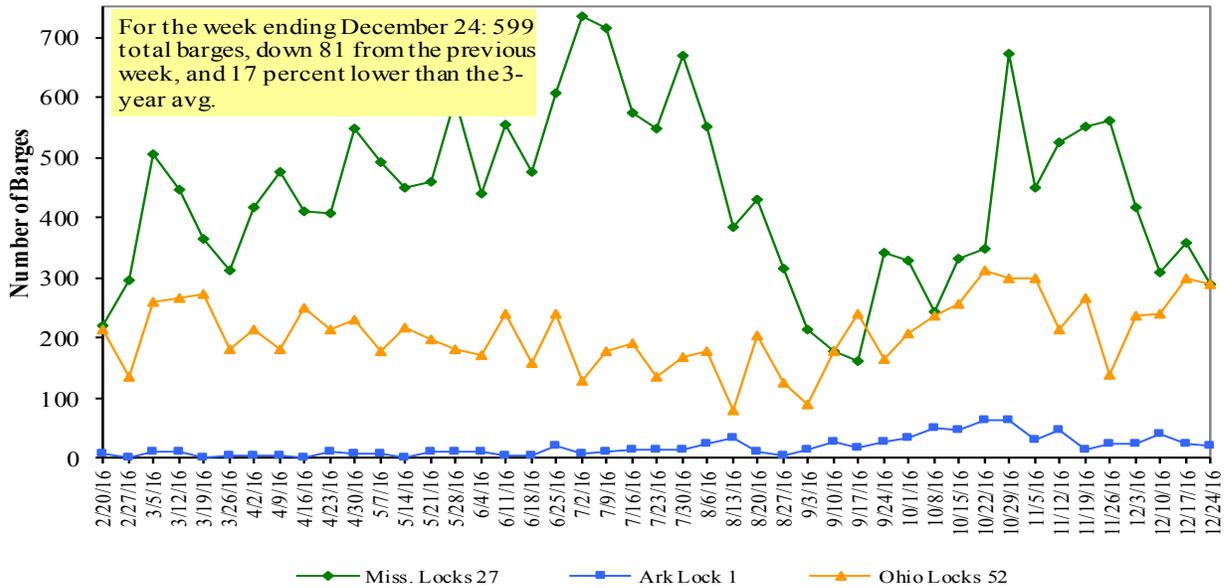
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

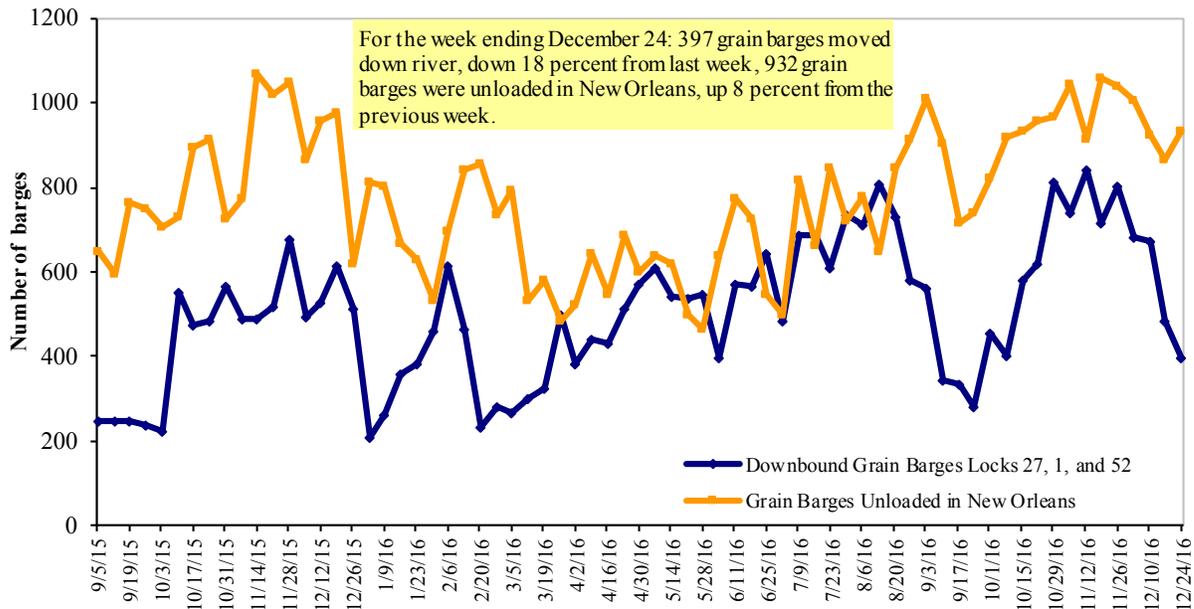
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 12/26/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.573	0.014	0.294
	New England	2.611	0.024	0.246
	Central Atlantic	2.687	0.020	0.275
	Lower Atlantic	2.478	0.008	0.317
II	Midwest ²	2.489	0.010	0.326
III	Gulf Coast ³	2.421	0.011	0.281
IV	Rocky Mountain	2.516	0.026	0.289
V	West Coast	2.807	0.019	0.340
	West Coast less California	2.727	0.022	0.409
	California	2.871	0.017	0.262
Total	U.S.	2.540	0.013	0.305

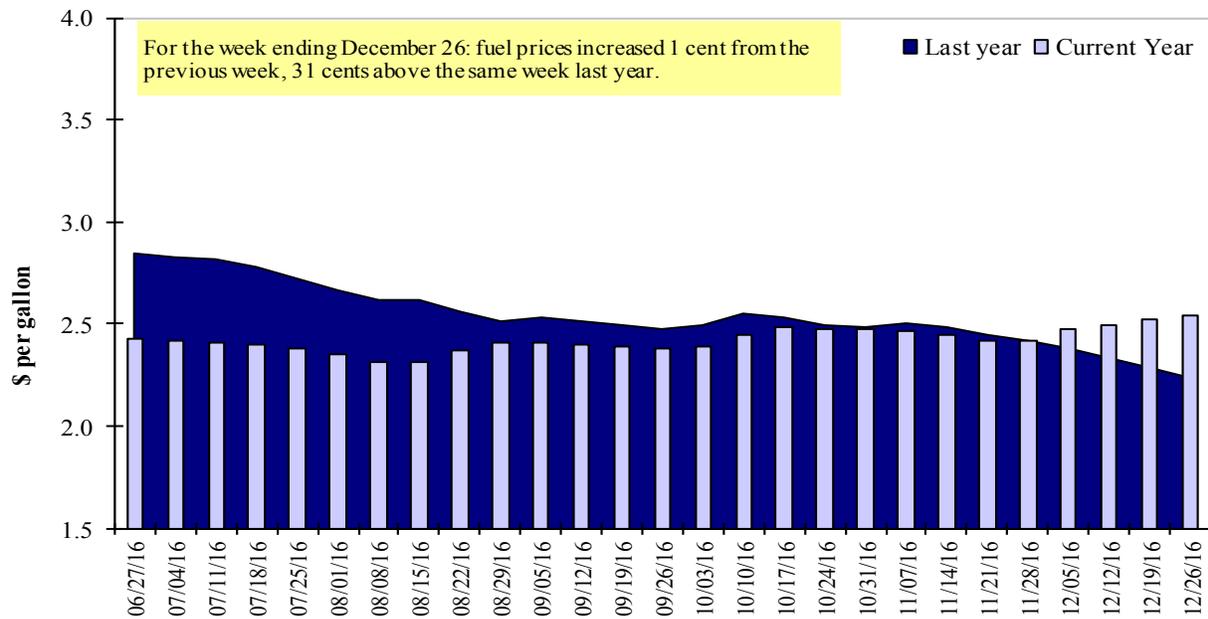
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
12/15/2016	1,994	644	2,435	1,094	149	6,316	19,634	17,289	43,239
This week year ago	1,344	592	1,471	1,008	69	4,483	11,008	12,978	28,469
Cumulative exports-marketing year²									
2016/17 YTD	6,153	1,132	4,084	2,284	230	13,882	14,711	29,622	58,215
2015/16 YTD	3,112	2,048	3,371	1,844	481	10,856	8,487	24,004	43,347
YTD 2016/17 as % of 2015/16	198	55	121	124	48	128	173	123	134
Last 4 wks as % of same period 2015/16	152	102	160	118	243	142	172	133	150
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 12/15/2016	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	4,883	2,985	64	11,284
Mexico	9,465	7,649	24	11,204
Korea	3,029	457	562	3,931
Colombia	2,132	1,802	18	4,134
Taiwan	1,678	357	370	1,912
Top 5 Importers	21,186	13,251	60	32,465
Total US corn export sales	34,345	19,494	76	46,633
% of Projected	61%	40%		
Change from prior week	1,251	804		
Top 5 importers' share of U.S. corn export sales	62%	68%		70%
USDA forecast, December 2016	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, December 2016	134,620	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 12/15/2016	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	29,821	22,188	34	29,033
Mexico	1,914	1,805	6	3,295
Indonesia	929	584	59	2,065
Japan	1,215	1,221	(1)	1,994
Taiwan	898	695	29	1,226
Top 5 importers	34,776	26,493	31	37,614
Total US soybean export sales	46,911	36,983	27	48,389
% of Projected	84%	70%		
Change from prior week	1,813	2,070		
Top 5 importers' share of U.S. soybean export sales	74%	72%		78%
USDA forecast, December 2016	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 12/15/2016	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	1,889	1,649	15	2,743
Mexico	1,942	1,601	21	2,660
Nigeria	1,053	1,303	(19)	1,978
Philippines	1,946	1,536	27	2,156
Brazil	1,107	359	209	2,076
Korea	1,016	960	6	1,170
Taiwan	734	787	(7)	1,005
Indonesia	699	194	259	776
Colombia	610	498	22	679
Thailand	607	382	59	618
Top 10 importers	11,602	9,269	25	15,861
Total US wheat export sales	20,198	15,339	32	24,485
% of Projected	76%	73%		
Change from prior week	298	370		
Top 10 importers' share of U.S. wheat export sales	57%	60%		65%
USDA forecast, December 2016	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 12/22/16	Previous Week ¹	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of:		2015 Total ²
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	241	251	96	12,086	10,671	113	132	125	10,985
Corn	119	167	71	11,819	7,232	163	568	193	7,232
Soybeans	493	487	101	14,078	11,386	124	134	131	11,809
Total	854	905	94	37,983	29,289	130	159	139	30,027
Mississippi Gulf									
Wheat	93	37	253	3,467	4,487	77	100	116	4,504
Corn	671	457	147	31,068	26,444	117	138	125	26,701
Soybeans	969	1,087	89	34,176	28,532	120	107	103	29,593
Total	1,733	1,581	110	68,711	59,463	116	115	110	60,797
Texas Gulf									
Wheat	129	149	87	5,878	3,692	159	149	139	3,724
Corn	38	41	94	1,669	596	280	334	254	596
Soybeans	22	55	40	1,105	864	128	112	87	864
Total	190	245	77	8,652	5,152	168	152	133	5,184
Interior									
Wheat	19	21	93	1,500	1,384	108	76	83	1,388
Corn	120	121	99	7,107	6,139	116	99	106	6,201
Soybeans	73	101	72	4,511	3,490	129	169	114	3,518
Total	213	243	87	13,118	11,013	119	115	106	11,106
Great Lakes									
Wheat	41	52	78	1,186	997	119	333	174	997
Corn	0	0	n/a	584	485	120	n/a	2785	485
Soybeans	42	0	n/a	910	733	124	175	80	733
Total	82	52	158	2,681	2,216	121	278	133	2,216
Atlantic									
Wheat	26	0	n/a	315	520	60	93	266	520
Corn	0	0	n/a	294	277	106	18	5	277
Soybeans	137	102	134	2,203	1,974	112	116	98	2,053
Total	163	102	159	2,812	2,771	101	114	101	2,850
U.S. total from ports²									
Wheat	548	509	108	24,433	21,752	112	133	128	22,118
Corn	949	787	121	52,541	41,173	128	162	136	41,492
Soybeans	1,738	1,833	95	56,983	46,980	121	118	109	48,570
Total	3,235	3,129	103	133,957	109,905	122	130	118	112,180

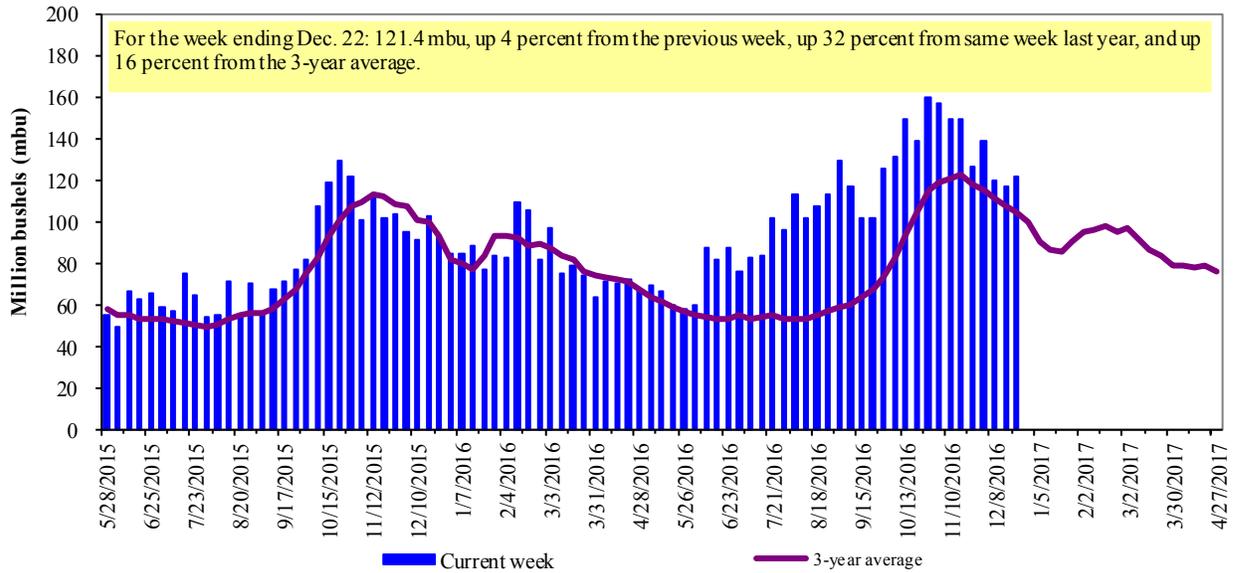
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

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

Figure 14

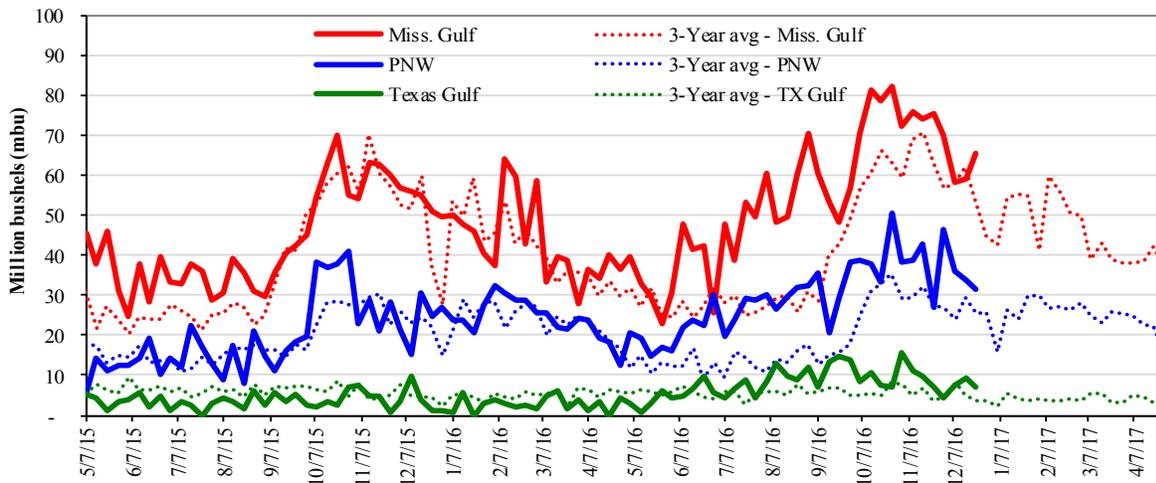
U.S. grain inspected for export (wheat, corn, and soybeans)



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

Figure 15

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



Week ending 12/22/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	65.5	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	31.7	Last Year (same week):	up 10	down 22	up 6	down 6
Texas Gulf:	7.1	3-yr avg. (4-wk. mov. Avg):	up 28	up 454	up 39	up 29
			up 14	up 33	up 16	up 20

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

Ocean Transportation

Table 17

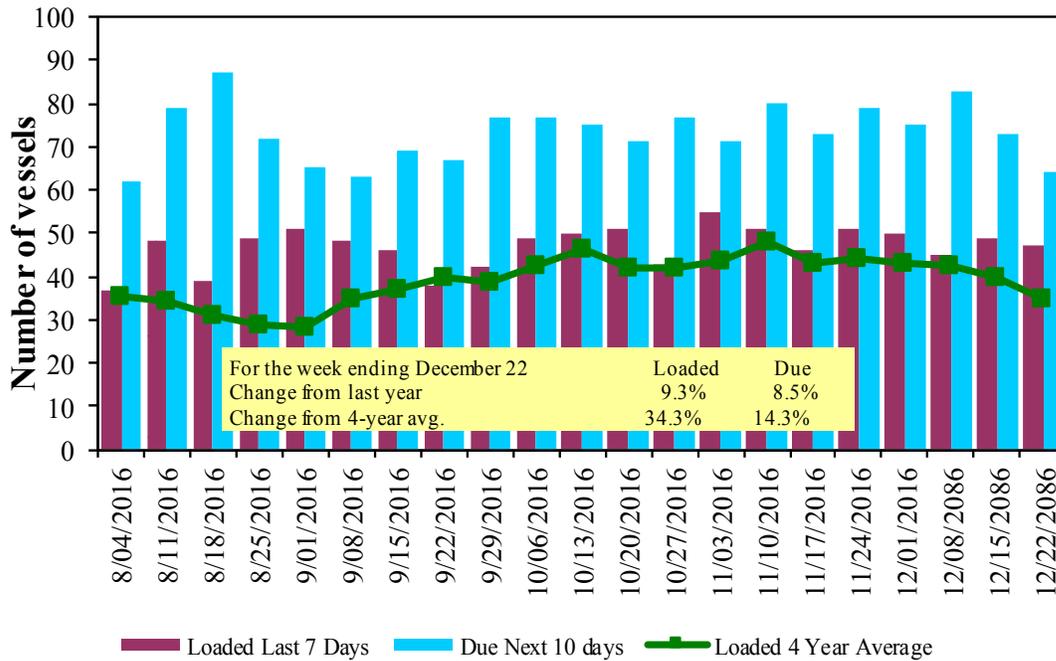
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
12/22/2016	52	47	64	26	n/a
12/15/2016	54	49	73	25	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

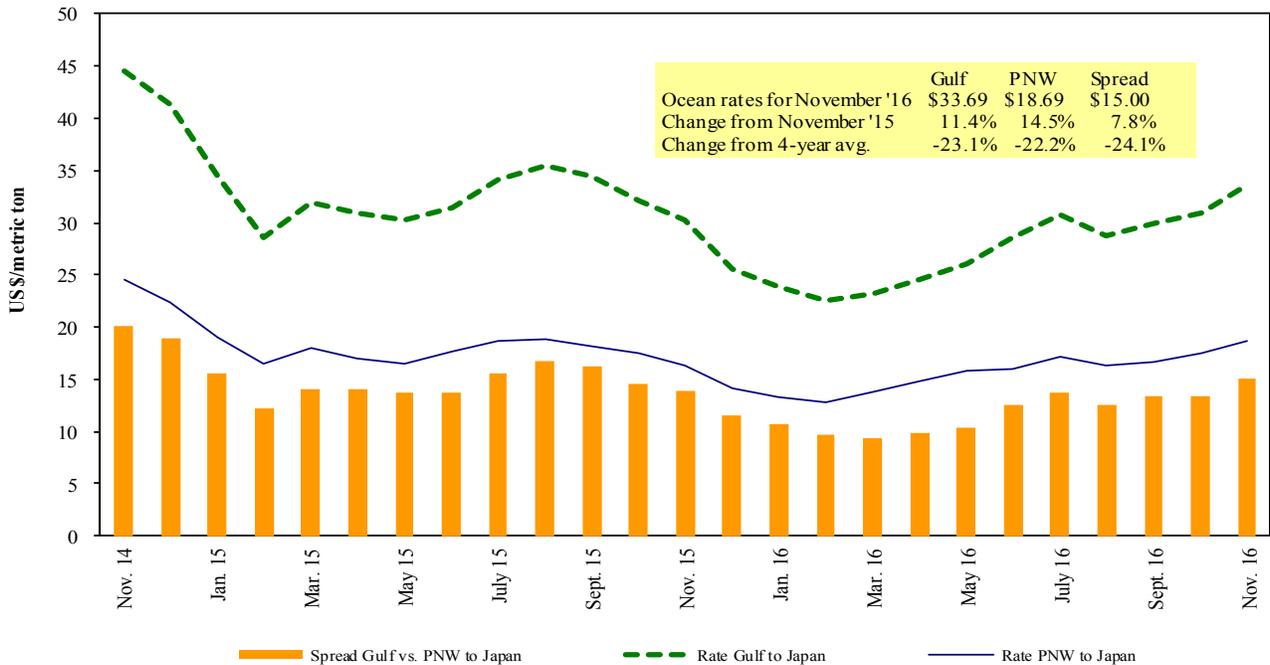
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 12/24/2016

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 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	China	Heavy Grain	Oct 20/30	65,000	27.50
U.S. Gulf	China	Heavy Grain	Oct 10/20	60,000	28.25
U.S. Gulf	China	Heavy Grain	Oct 5/15	66,000	28.00
U.S. Gulf	China	Heavy Grain	Sep 20/25	60,000	27.75
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*
PNW	Taiwan	Wheat	Sep 8/22	54,000	21.10
Black Sea	Spanish Mediterranean	Heavy Grain	Oct 14/18	60,000	9.35
Brazil	South Korea	Heavy Grain	Mar 15/Apr 15	65,000	23.50
River Plate	South Africa	Soybeans	Nov 1/14	25,000	24.00
River Plate	Algeria	Corn	Sep 24/28	40,000	19.50
Ukraine	Iran	Wheat	Oct 10/17	60,000	22.25

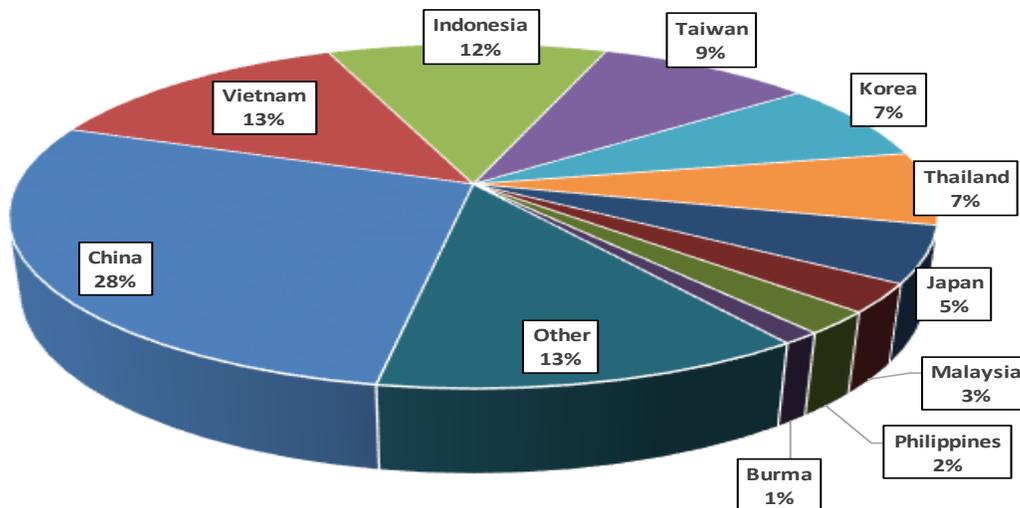
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

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

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-August 2016

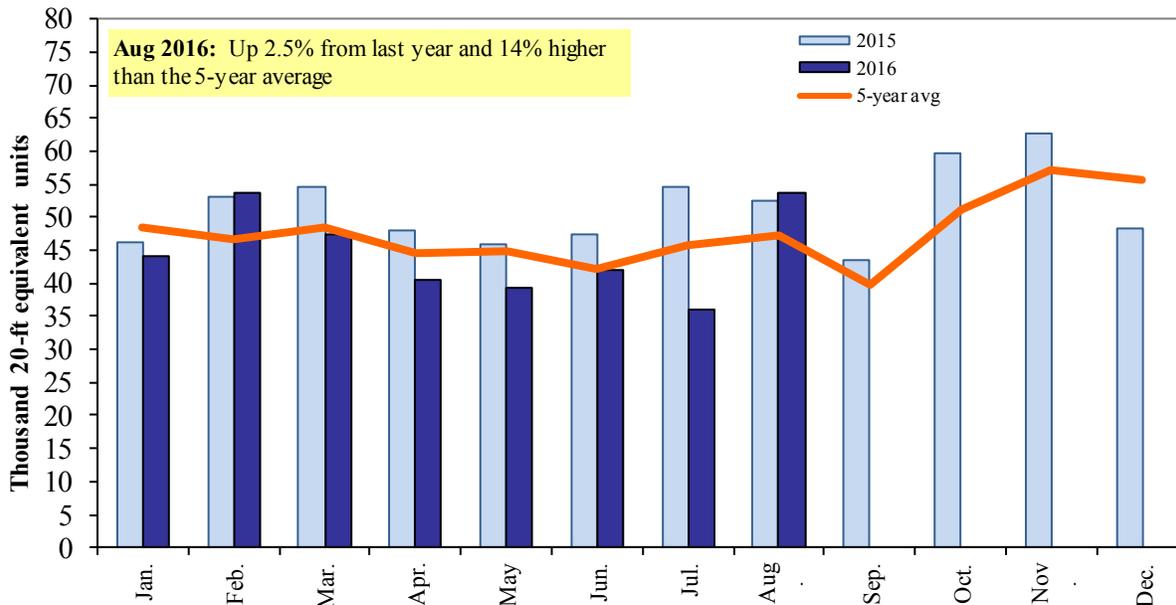


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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