



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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WEEKLY HIGHLIGHTS

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Wheat and Corn Inspections Increase Notably

For the week ending January 25, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.69 million metric tons (mmt); up 1 percent from the previous week, down 12 percent from last year, and 10 percent above the 3-year average. The increase in inspections was helped by a jump in wheat and corn inspections, with each increasing 37 percent from the previous week. Soybean inspections, however, dropped 26 percent from the past week as demand from China decreased. Mississippi Gulf inspections rebounded from the past week, increasing 22 percent as shipments to Latin America and Asia remained strong. Pacific Northwest (PNW) grain inspections decreased 16 percent from the past week. Outstanding (unshipped) export sales were also up from the previous week for wheat and corn, but down for soybeans.

Milder Temperatures Continuing to Improve Inland Navigation Conditions

During late January, milder winter conditions have improved navigation conditions on the Mississippi and Illinois Rivers. However, some navigational aids on the Illinois River have been moved or are missing due to the rapid formation and disappearance of ice accumulations. For the week ending January 27, downbound grain shipments at Mississippi River Locks 27 were 180 thousand tons, 217 percent higher than the previous week. However, with the improved conditions, rock pinnacle removal between St. Louis and Cairo, IL, has resumed and is slowing traffic due to the complete closure of the river at that location. The removal is being done during daylight hours, and traffic is only allowed at night during non-work hours.

Soy Transportation Coalition Releases Infrastructure Priorities

On January 29, the Soy Transportation Coalition (STC)—which comprises 13 State soybean boards, the American Soybean Association, and the United Soybean Board—[published its "Top 10" infrastructure priorities](#). Among those listed are maintenance and rehabilitation of locks and dams, particularly for Locks and Dams 20 through 25; dredging the lower Mississippi River to 50 feet between Baton Rouge, LA, and the Gulf; ensuring the Columbia River shipping channel from Portland, OR, to the Pacific Ocean is maintained at no less than 43 feet; and permitting six-axle, 91,000-pound semis to operate on the interstate highway system. Soybeans are a growing source of the overall demand for grain transportation in the U.S., with a record 4.39 billion bushels produced in 2017, 8 percent higher than the prior 3-year average.

Snapshots by Sector

Export Sales

For the week ending January 18, **unshipped balances** of wheat, corn, and soybeans totaled 34.2 mmt; down 13 percent from the same time last year. Net weekly **wheat export sales** were .427 mmt; up significantly from the previous week. Net **corn export sales** were 1.45 mmt; down 23 percent from the previous week. Net **soybean export sales** were .616 mmt for the same period; down 50 percent from the previous week.

Rail

U.S. Class I railroads originated 23,251 **grain carloads** for the week ending January 20; up 6 percent from the previous week, down 5 percent from last year, and down 1 percent from the 3-year average.

Average February shuttle **secondary railcar** bids/offers per car were \$195 above tariff for the week ending January 25; up \$70 from last week, and \$880 lower than last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending January 27, **barge grain movements** totaled 530,850 tons; 7 percent higher than the previous week and down 26 percent from the same period last year.

For the week ending January 27, 320 grain barges **moved down river**; up 8 percent from last week. There were 780 grain barges **unloaded in New Orleans**; 38 percent higher than the previous week.

Ocean

For the week ending January 25, 33 **ocean-going grain vessels** were loaded in the Gulf; 27 percent less than the same period last year. Fifty-five vessels are expected to be loaded within the next 10 days; 18 percent less than the same period last year.

For the week ending January 25, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.75 per metric ton; 1 percent more than the previous week. The cost of shipping from the PNW to Japan was \$25.00 per metric ton; 2 percent more than the previous week.

Fuel

During the week ending January 29, average **diesel fuel prices** increased 5 cents from previous week at \$3.07 per gallon; 51 cents higher than the same week last year.

Recent Grain Disappearance Suggests Increased Demand for Truck Transportation

Total grain stocks on December 1 were at a record 18 billion bushels, up less than 1 percent from the prior year. However, disappearance remained on pace with last year despite fewer rail carloads of grain and grain barges unloaded in New Orleans during the fourth quarter of 2017. These factors suggest domestic truck movements are increasing.

U.S. grain producers operate within a highly competitive world market and changes in production or use across the globe will effect transportation flows in the U.S. The decision on whether to store grain or sell it—either in domestic or world markets—depends on many factors, from local demand to global supply. Changes in world grain markets will affect domestic grain marketing decisions and ultimately impact grain transportation demand in the U.S. This article looks at trends in world grain markets and in U.S. grain stocks to better understand recent grain transportation patterns in the U.S. It also provides an outlook for the year to come.

Recent Trends in U.S. Exports

While U.S. grain inspections were strong for the first half of calendar year 2017, third and fourth quarter inspections were down 21 and 22 percent, respectively, from the previous year. Compared to 2016, U.S. corn exports declined 0.24 million bushels (35 percent) in the third quarter and 0.14 million bushels (32 percent) in the fourth quarter, with most exports destined to East Asia. Fourth quarter soybean exports in 2017 were also down significantly (0.19 million bushels, 17 percent) from the same quarter in 2016 due to reduced exports to China. In each case, competition from Brazil played an important role. According to USDA's Foreign Agricultural Service (FAS), Brazil has seen record corn and soybean harvests. The large crops put downward pressure on corn and soybean prices, making Brazil more competitive with the U.S. Like the U.S., Brazil exports large volumes of corn to East Asia and soybeans to China, which explains why U.S. grain inspections were low during the second half of the year.*

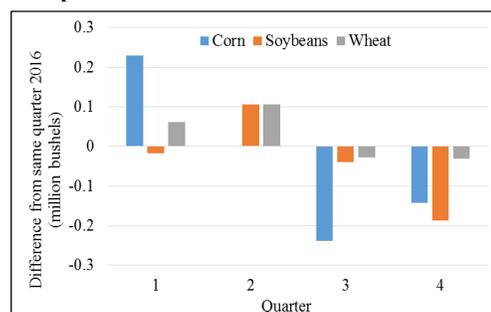
The decline in grain exports showed up in rail carloadings numbers as well as unloaded barges. In the fourth quarter of 2017, rail carloadings were down 11 percent from 2016 and down 6 percent from the prior 3 year average (GTR Figure 3). The number of barges unloaded in New Orleans in the fourth quarter was also down 14 percent from a year prior (GTR Figure 12). While these numbers, and the decline in exports, suggest the demand for grain transportation was down in the second half of 2017, grain exports are only one component of total transportation demand. Grain stocks data, along with an examination of grain used domestically, provides an indicator of total grain transportation demand.

Recent Grain Supplies and Movements

To quantify grain supplies and movement over the period, this section looks at September 1 grain stocks, post-September 1 grain production, and December 1 grain stocks. Comparing these data provides an indicator of grain transportation demand.

Reviewing USDA's National Agricultural Statistics Service (NASS) data on grain stocks and production over time provides snapshots of available grain volumes at different points during the year. NASS provides data on the amount of grain stored (i.e., stocks) as of four points during the year: March 1, June 1, September 1, and December 1.† These quarters align with the timing of crop production. For example, growers in the United States typically harvest wheat and other small grains after June 1, but before September. In the Midwest, most farmers harvest corn and soybeans in the fall, usually after September 1, and finish before December, although the harvesting of southern crops often starts and ends sooner. Therefore, Nationwide, September 1 grain stocks (the amount of grain already in storage as of that date)‡ plus the amount of grain harvested after September 1 (the amount of *new* grain added from corn, soybeans, and grain sorghum) indicates the total amount of grain available to draw from for movement for the remainder of the year until the next harvest (not including any grain imports). December 1 grain stocks then shed additional light on the amount of grain available, since it is later in time and the harvests of the various grains are complete. The difference between these two periods—called disappearance—gives an indication of grain movements and outflows, as grain is moved and used for food, feed, fuel, exports, and other purposes.

Figure 1: 2017 Quarterly Grain Exports Compared to a Year Prior.



USDA-AMS, Grain Transportation Report.

* USDA FAS, [Grain: World Markets and Trade \(September 2017\)](#) and [Oilseeds: World Markets and Trade \(January 2018\)](#).

† NASS collects this data by crop, by State, and also distinguishes between on- and off-farm. NASS publishes the data at the end of March, June, and September, and the middle of January.

‡ September 1 grain stocks include barley, "old crop" corn, oats, "old crop" grain sorghum, "old crop" soybeans, and wheat.

Figure 2 shows the sum of September 1 grain stocks and post-September 1 grain production (blue and orange bars combined), and it uses December 1 grain stocks (black line) to calculate disappearance during the period (gray bars). A few observations are worth noting in this figure. First, the sum of September 1 stocks and post-September 1 grain production was only slightly lower than last year, down 1 percent (9 percent above 2015). Second, December 1, 2017, grain stocks were also similar to the year before, up less than 1 percent. Lastly, disappearance over the period is comparable between 2017 and 2016, down about 0.3 million bushels or 4 percent.

Disappearance should correlate strongly with movements, as grain ultimately used away from the farm and elevator requires transportation. Given the year-to-year decline in fourth-quarter rail and barge movements, the steady disappearance numbers between 2017 and 2016 suggest a shift in transportation demand rather than an overall decrease. Rail and barge tend to support export grain movements, and U.S. grain exports (as measured by the quantity of grain inspected) are down. While exports dropped, domestic use increased compared to last year. As shown in Figure 3, according to preliminary projections from USDA’s Economic Research Service (ERS), the United States used 4.0 billion bushels of corn domestically from September through November, up 2 percent from 2016, and the United States crushed 14.8 million tons of soybeans from September through November (also up 2 percent).* Thus, increased movements to domestic markets may explain comparable disappearance levels from September to December, even though exports are down. According to AMS’ [Transportation of U.S. Grains: A Modal Share Analysis](#), trucks haul most domestic grain shipments (accounting for a 76 percent share from 2010 to 2014). Therefore, a boost in shipments to domestic markets may not be seen in the rail and barge numbers.

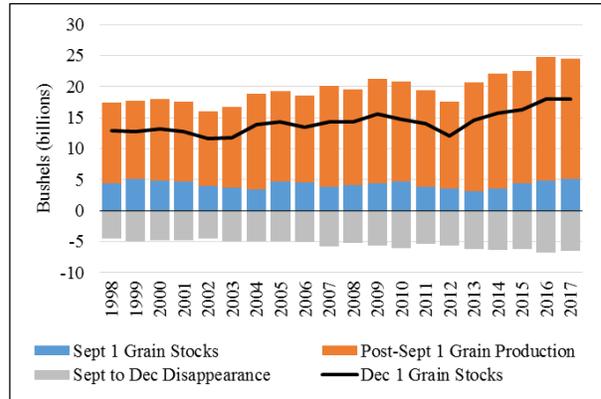
Outlook

Observations in USDA’s latest [January World Agricultural Supply and Demand Estimates report](#) also point to the possible shift from exports to domestic use. USDA projects a small (1 percent) decline in the amount of corn and soybeans used from September 1, 2017 through August 30, 2018 compared to a year ago. USDA forecasts domestic use (i.e., for food, feed, ethanol, etc.) of corn and soybeans to increase 2 and 3 percent, respectively, compared to last year, but exports are expected to fall 16 percent for corn and 1 percent for soybeans. Since total use of these crops is falling only marginally (about 1 percent), it suggests the total demand for grain transportation in 2017/18 may be comparable to last year (if only slightly muted); although shares among modes may change. Trucks haul most of the grain moved domestically, while railroads and barge freight dominate grain destined to export markets. All else equal, reductions in exports, along with boosts in the domestic use of corn and soybeans, may shift grain traffic over to trucks. This is a shift that seems to have begun, as indicated by the steady September-to-December grain disappearance, amid declining rail carloads, barges unloaded, and grains inspected for export.

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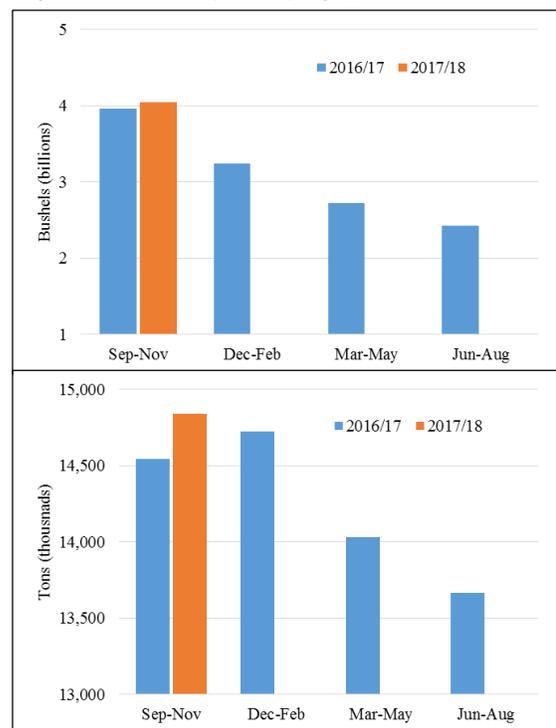
* USDA-ERS, Feed Grains: Yearbook Tables, January 19, 2018, and USDA-NASS, *Fats and Oils: Oilseed Crushings, Production, Consumption and Stocks* reports.

Figure 2: Fall and Winter Grain Supplies.



USDA-AMS analysis of NASS data.

Figure 3: Domestic Use of Corn (top) and Tonnage of Soybeans Crushed (bottom), by Quarter.



USDA-AMS analysis of ERS and NASS data. See ERS’ *Feed Grains: Yearbook Tables* and NASS’ *Fats and Oils: Oilseed Crushings, Production, Consumption and Stocks*

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
01/31/18	201	273	222	199	200	177
01/24/18	203	273	219	183	199	174

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)

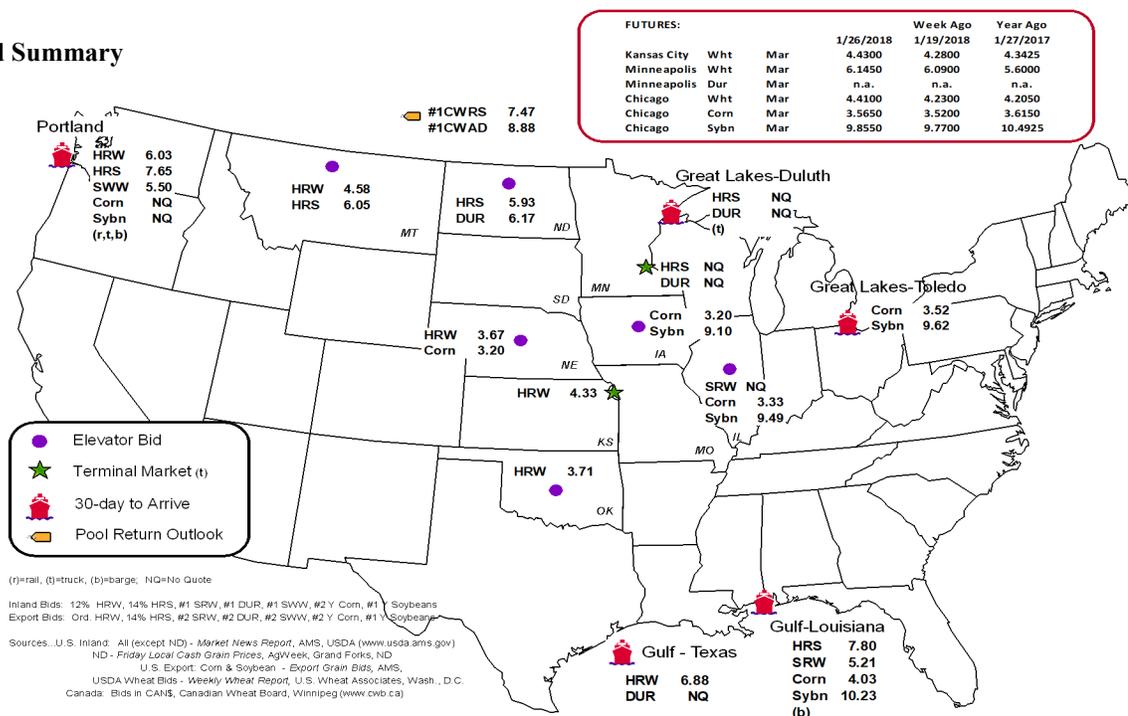
Commodity	Origin--Destination	1/26/2018	1/19/2018
Corn	IL--Gulf	-0.70	-0.63
Corn	NE--Gulf	-0.83	-0.78
Soybean	IA--Gulf	-1.13	-1.19
HRW	KS--Gulf	-2.55	-2.50
HRS	ND--Portland	-1.72	-1.65

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			
01/24/2018 ^p	973	1,719	5,675	338	8,705	1/20/2018	2,013
01/17/2018 ^r	975	1,675	6,996	235	9,881	1/13/2018	1,508
2018 YTD ^r	2,514	5,592	22,718	890	31,714	2018 YTD	6,824
2017 YTD ^r	3,301	7,132	22,542	3,416	36,391	2017 YTD	7,838
2018 YTD as % of 2017 YTD	76	78	101	26	87	% change YTD	87
Last 4 weeks as % of 2017 ²	76	78	101	26	87	Last 4wks % 2017	87
Last 4 weeks as % of 4-year avg. ²	67	97	104	26	91	Last 4wks % 4 yr	101
Total 2017	28,766	76,045	289,178	21,999	415,988	Total 2017	119,661
Total 2016	36,925	87,863	299,606	29,007	453,401	Total 2016	92,982

¹Data is incomplete as it is voluntarily provided

²Compared with same 4-weeks in 2017 and prior 4-year average.

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

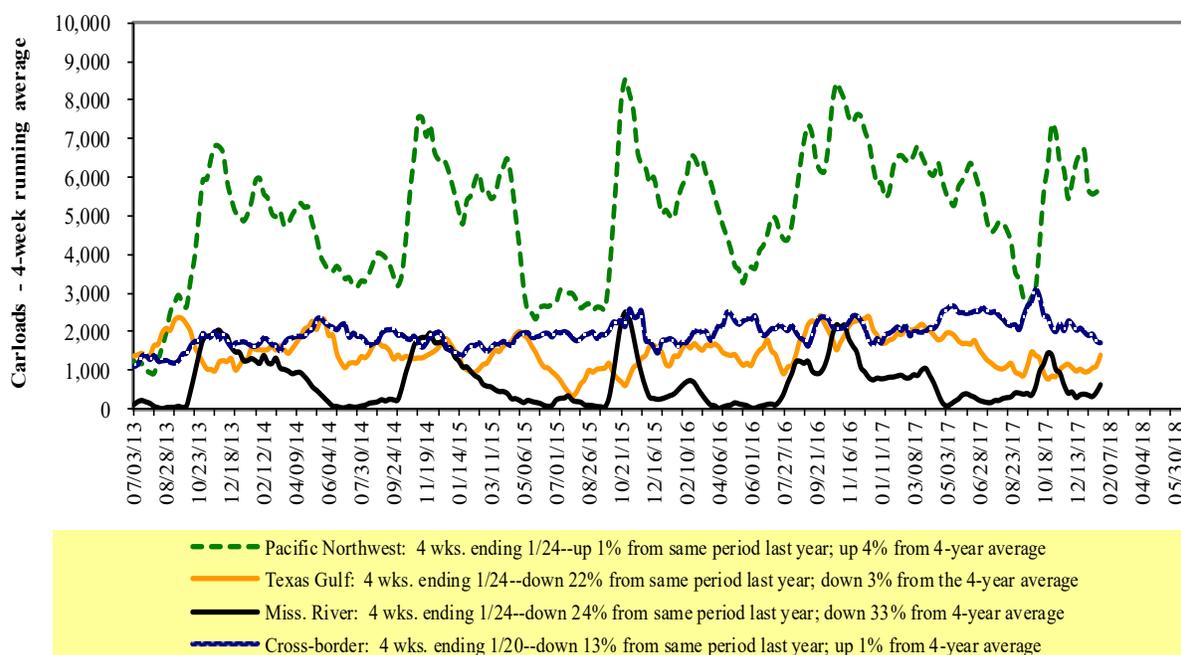
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

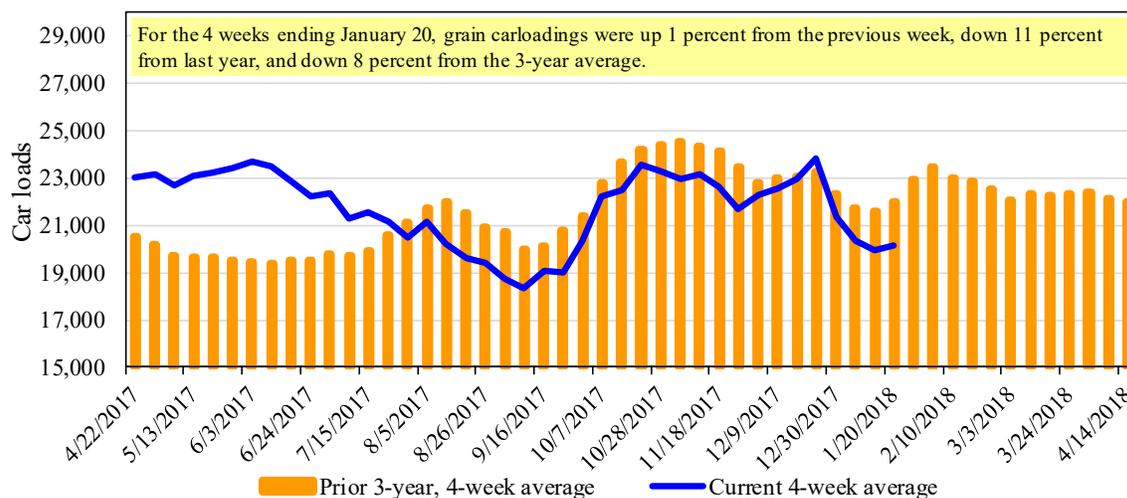
For the week ending: 1/20/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,030	2,587	12,400	753	5,481	23,251	4,326	4,867
This week last year	2,125	3,337	11,467	1,614	5,969	24,512	4,006	3,495
2018 YTD	5,659	7,382	33,875	2,923	15,007	64,846	10,675	12,445
2017 YTD	6,092	9,468	34,221	3,135	17,559	70,475	10,658	11,475
2018 YTD as % of 2017 YTD	93	78	99	93	85	92	100	108
Last 4 weeks as % of 2017*	89	78	94	96	85	89	100	100
Last 4 weeks as % of 3-yr avg.**	81	78	99	102	87	92	94	92
Total 2017	89,465	142,816	578,964	50,223	289,574	1,151,042	198,775	244,766

*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: 1/25/2018		Delivery period							
		Feb-18	Feb-17	Mar-18	Mar-17	Apr-18	Apr-17	May-18	May-17
BNSF ³	COT grain units	0	256	no bids	100	no bids	3	no bids	1
	COT grain single-car ⁵	0	443	no bids	270	no bids	52	no bids	28
UP ⁴	GCAS/Region 1	10	no bids	10	no bids	no bids	no bids	n/a	n/a
	GCAS/Region 2	10	76	10	no bids	no bids	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.

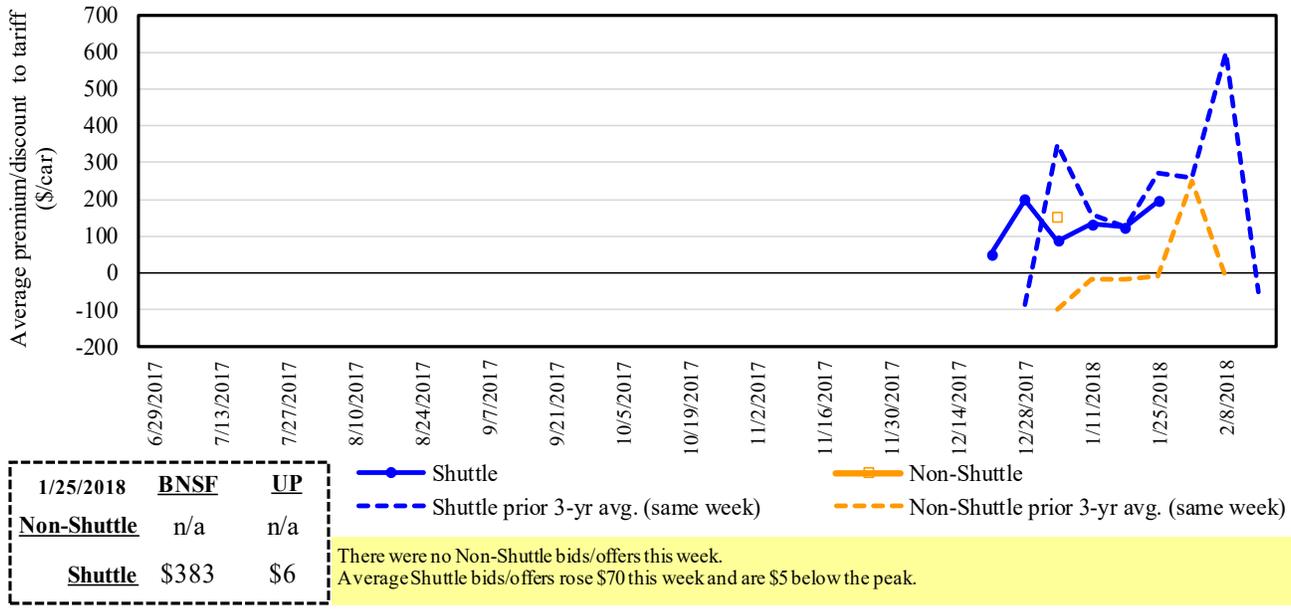
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

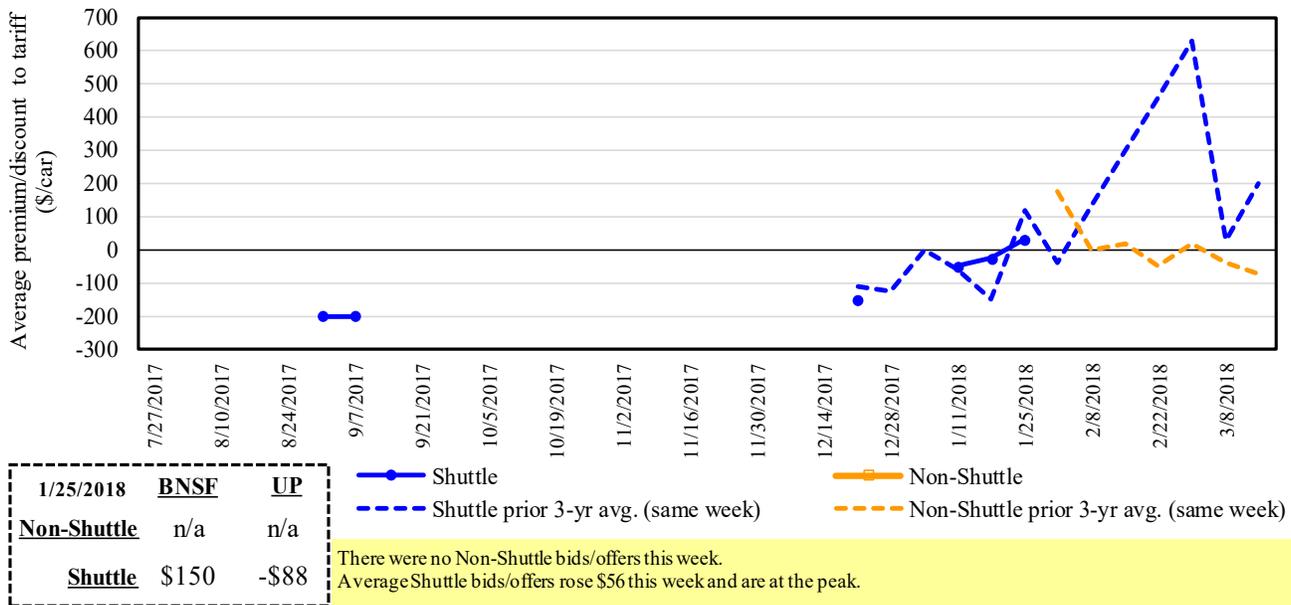
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in February 2018, Secondary Market



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

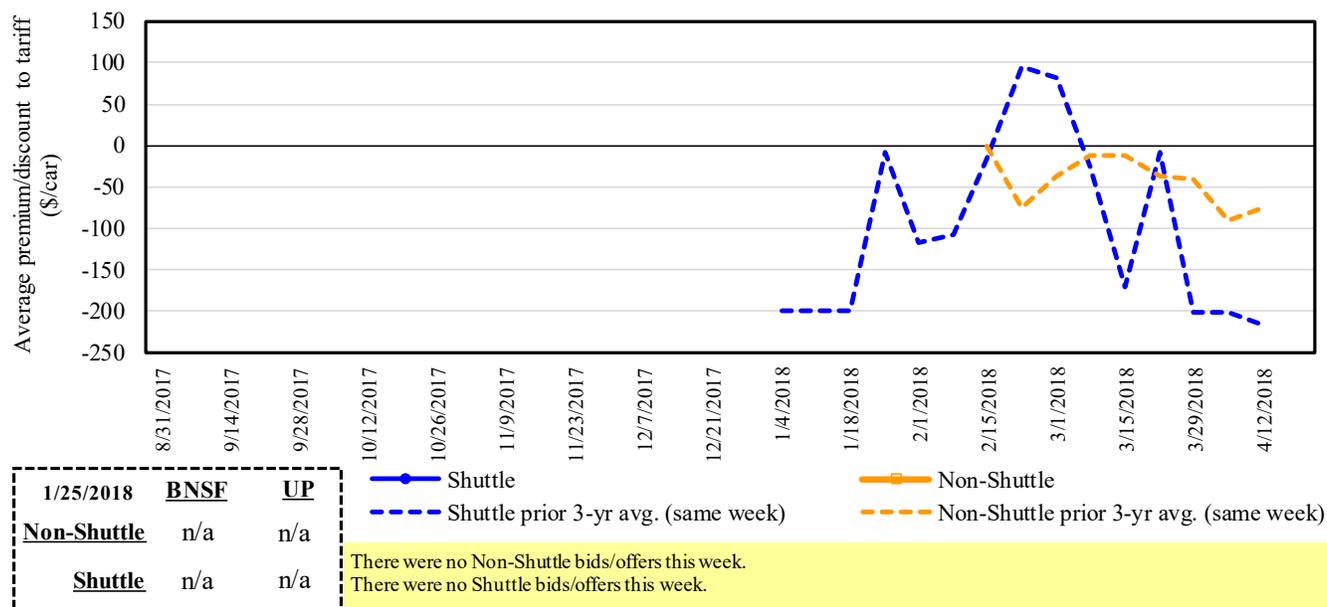
Figure 5
Bids/Offers for Railcars to be Delivered in March 2018, Secondary Market



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

Figure 6

Bids/Offers for Railcars to be Delivered in April 2018, 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: 1/25/2018		Delivery period					
		Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
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 2017	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 2017	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	383	150	n/a	n/a	n/a	n/a
	Change from last week	133	100	n/a	n/a	n/a	n/a
	Change from same week 2017	(1367)	(1000)	n/a	n/a	n/a	n/a
	UP-Pool	6	(88)	n/a	n/a	n/a	n/a
	Change from last week	6	13	n/a	n/a	n/a	n/a
	Change from same week 2017	(394)	(288)	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

February, 2018	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	bushel ²	Percent change Y/Y ⁴	
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,883	\$86	\$39.41	\$1.07	4	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0	
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1	
	Wichita, KS	New Orleans, LA	\$4,540	\$151	\$46.59	\$1.27	5	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	1	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$166	\$49.47	\$1.35	5	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$231	\$52.15	\$1.42	5	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$171	\$40.74	\$1.03	9	
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5	
	Des Moines, IA	Davenport, IA	\$2,258	\$36	\$22.78	\$0.58	1	
	Indianapolis, IN	Atlanta, GA	\$5,446	\$0	\$54.08	\$1.37	5	
	Indianapolis, IN	Knoxville, TN	\$4,540	\$0	\$45.08	\$1.15	5	
	Des Moines, IA	Little Rock, AR	\$3,609	\$106	\$36.90	\$0.94	3	
	Des Moines, IA	Los Angeles, CA	\$5,327	\$310	\$55.98	\$1.42	5	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$156	\$37.61	\$1.02	2	
	Toledo, OH	Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5	
	Indianapolis, IN	Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5	
	Indianapolis, IN	Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5	
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$171	\$48.82	\$1.33	7	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0	
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	2	
	Chicago, IL	Albany, NY	\$5,663	\$0	\$56.24	\$1.53	3	
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	0	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0	
	Northwest KS	Portland, OR	\$5,812	\$272	\$60.42	\$1.64	5	
	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0	
Corn	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0	
	Champaign-Urbana, IL	New Orleans, LA	\$3,731	\$171	\$38.75	\$0.98	9	
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0	
	Des Moines, IA	Amarillo, TX	\$3,970	\$134	\$40.75	\$1.04	3	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
	Council Bluffs, IA	Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
		Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0
		Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0
		Council Bluffs, IA	New Orleans, LA	\$4,775	\$197	\$49.38	\$1.34	7
Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3		
Grand Island, NE	Portland, OR	\$5,710	\$278	\$59.47	\$1.62	7		

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 lbs./bu., wheat and soybeans 60 lbs./bu.

³Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change ⁴ Y/Y	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Date: February, 2018							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$118	\$68.96	\$1.87	1
	KS	Guadalajara, JA	\$7,309	\$269	\$77.42	\$2.10	2
	TX	Salinas Victoria, NL	\$4,292	\$72	\$44.59	\$1.21	2
Corn	IA	Guadalajara, JA	\$8,313	\$248	\$87.47	\$2.22	2
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$244	\$84.38	\$2.14	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$238	\$77.83	\$1.98	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$230	\$85.47	\$2.32	-6
	NE	Guadalajara, JA	\$8,692	\$253	\$91.39	\$2.48	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$188	\$78.43	\$2.13	0
Sorghum	NE	Celaya, GJ	\$7,345	\$231	\$77.40	\$1.96	3
	KS	Queretaro, QA	\$7,819	\$148	\$81.40	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$119	\$67.13	\$1.70	5
	NE	Torreon, CU	\$6,790	\$182	\$71.23	\$1.81	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.

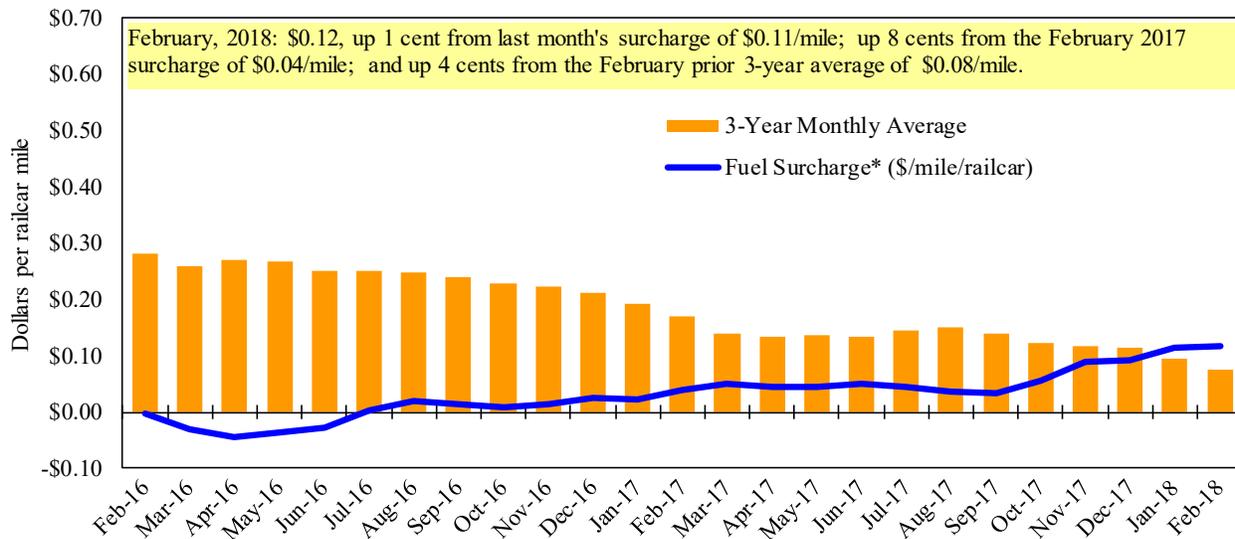
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

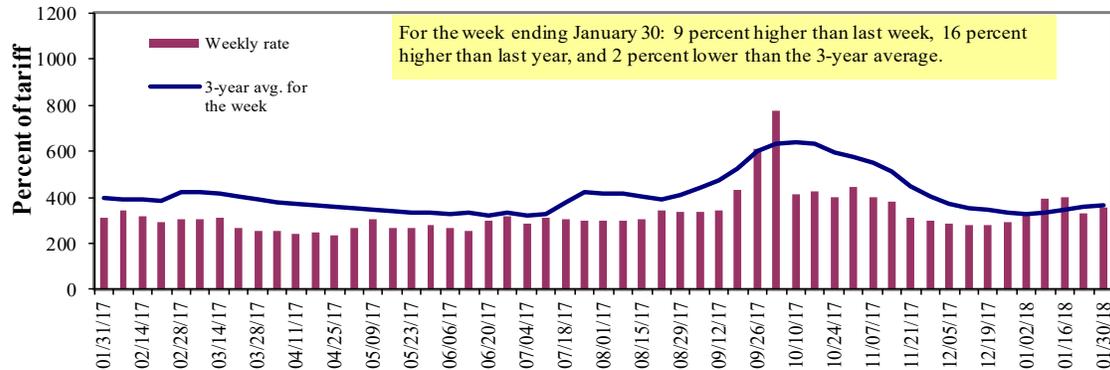
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	1/30/2018	-	-	358	288	308	308	210
	1/23/2018	-	-	329	266	265	265	185
\$/ton	1/30/2018	-	-	16.61	11.49	14.45	12.44	6.59
	1/23/2018	-	-	15.27	10.61	12.43	10.71	5.81
Current week % change from the same week:								
	Last year	-	-	16	30	10	10	-1
	3-year avg. ²	-	-	-2	10	8	8	-2
Rate ¹	February	-	-	340	253	275	275	200
	April	368	308	305	228	245	245	195

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" = closed

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.

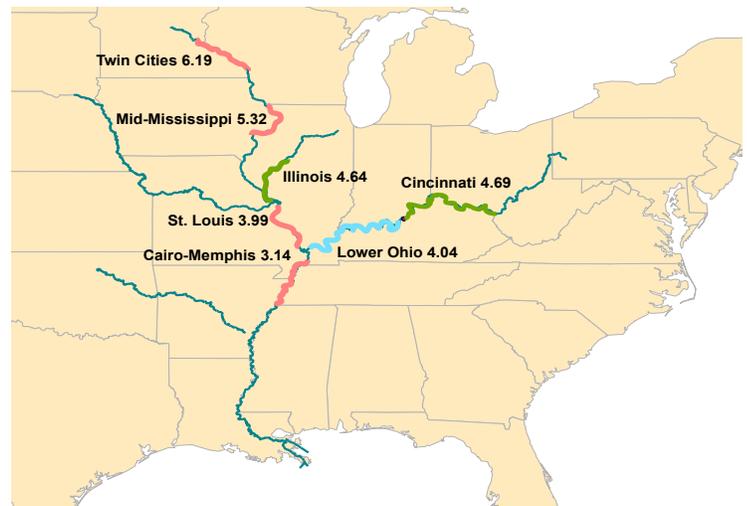
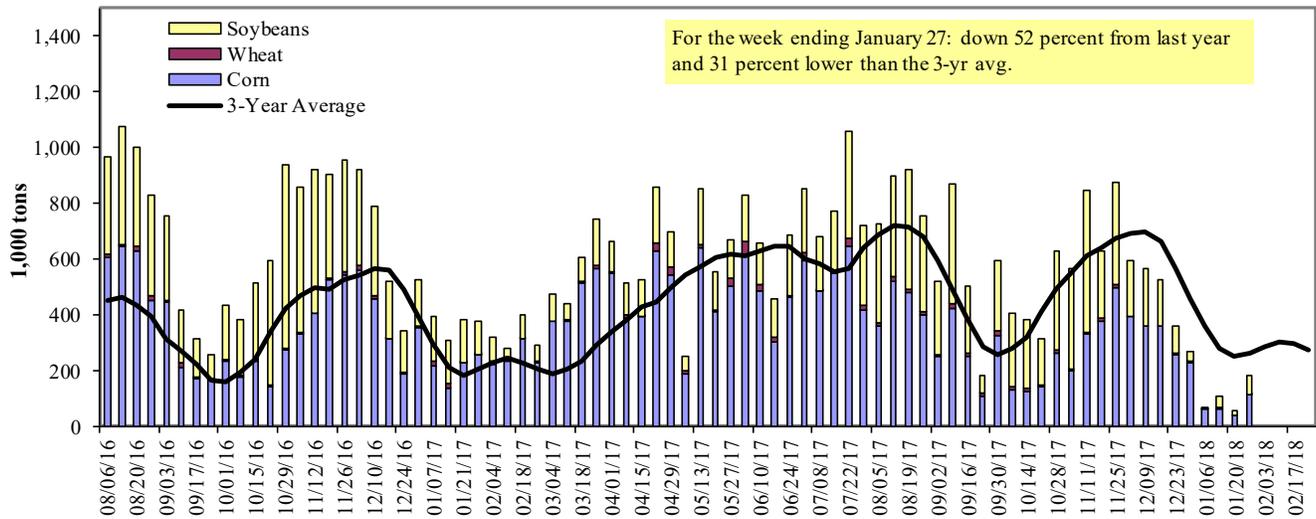


Figure 10

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 01/27/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	11	2	8	0	21
Alton, IL (L26)	120	2	66	0	187
Granite City, IL (L27)	113	2	66	0	180
Illinois River (L8)					
	80	0	40	0	120
Ohio River (L52)					
	76	0	216	4	296
Arkansas River (L1)					
	0	10	45	0	55
Weekly total - 2018	189	11	327	4	531
Weekly total - 2017	352	24	327	16	719
2018 YTD ¹	554	63	904	4	1,524
2017 YTD	1,225	136	1,376	71	2,808
2018 as % of 2017 YTD	45	46	66	5	54
Last 4 weeks as % of 2017 ²	45	46	66	5	54
Total 2017	22,242	2,210	16,123	360	40,936

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.

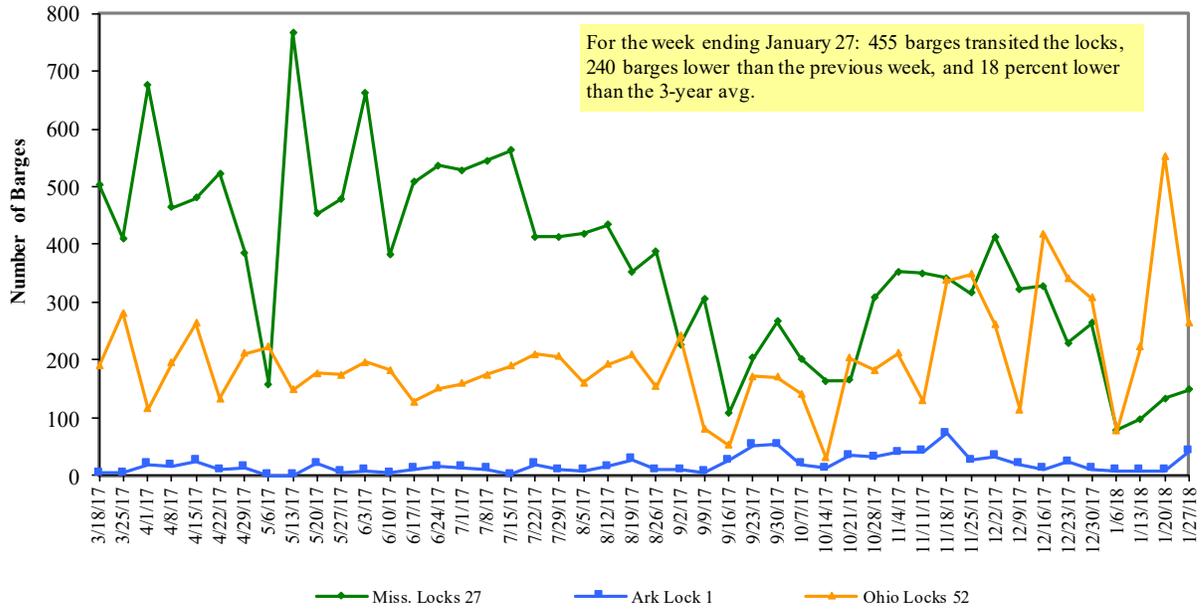
² As a percent of same period in 2017.

Note: Total may not add exactly, due to rounding.

Source: U.S. Army Corps of Engineers

Figure 11

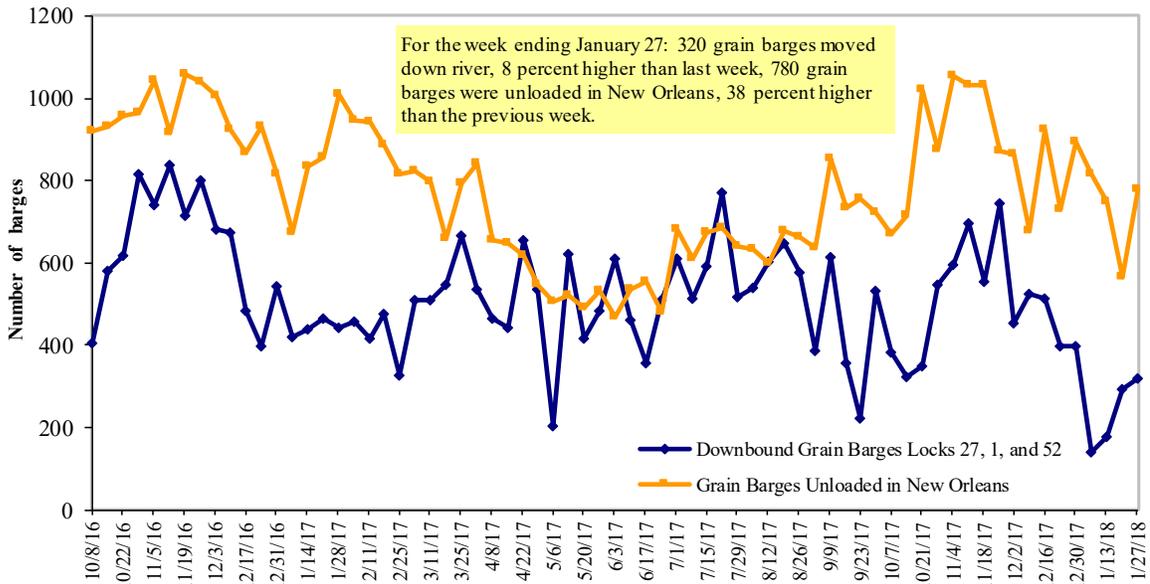
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 Prices, Week Ending 01/29/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.112	0.034	0.490
	New England	3.16	0.024	0.498
	Central Atlantic	3.306	0.030	0.536
	Lower Atlantic	2.968	0.039	0.458
II	Midwest ²	3.030	0.059	0.530
III	Gulf Coast ³	2.868	0.053	0.460
IV	Rocky Mountain	2.967	0.012	0.451
V	West Coast	3.434	0.039	0.589
	West Coast less California	3.12	0.037	0.376
	California	3.683	0.040	0.756
Total	U.S.	3.070	0.045	0.508

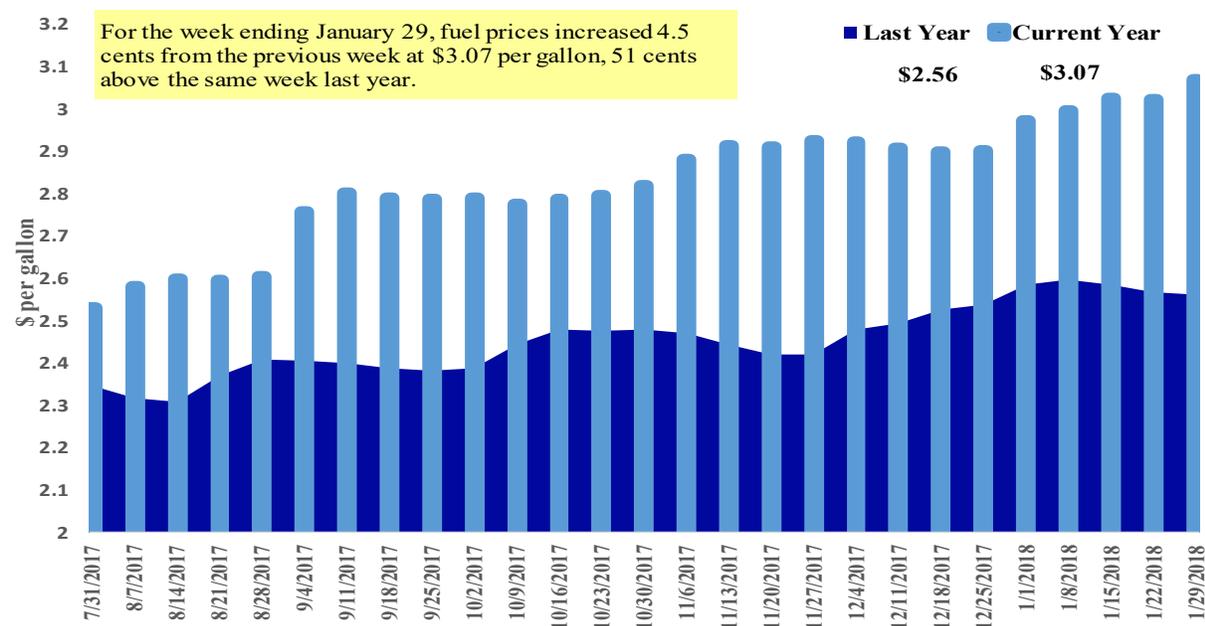
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
1/18/2018	2,038	726	1,456	1,099	58	5,378	17,637	11,163	34,177
This week year ago	2,184	628	2,522	1,312	137	6,783	20,162	12,464	39,409
Cumulative exports-marketing year²									
2017/18 YTD	6,025	1,325	3,805	3,375	214	14,744	12,765	32,073	59,582
2016/17 YTD	6,868	1,315	4,658	2,548	265	15,654	18,912	37,376	71,942
YTD 2017/18 as % of 2016/17	88	101	82	132	81	94	67	86	83
Last 4 wks as % of same period 2016/17	94	119	61	86	42	82	82	95	86
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,486

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for wheat, 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 1/18/2018			% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
Mexico	9,938	10,233	(3)	12,297
Japan	5,058	6,007	(16)	11,450
Korea	1,492	3,261	(54)	4,494
Colombia	2,173	2,509	(13)	4,179
Peru	1,841	1,933	(5)	2,693
Top 5 Importers	20,501	23,944	(14)	35,113
Total US corn export sales	30,401	39,074	(22)	49,308
% of Projected	62%	67%		
Change from prior week²	1,446	1,370		
Top 5 importers' share of U.S. corn export sales	67%	61%		71%
USDA forecast, January 2018	48,982	58,346	(16)	
Corn Use for Ethanol USDA forecast, January 2018	140,335	138,151	2	

¹ Based on FAS Marketing Year Ranking Reports for 2016/17 - 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/esquery/>. Total commitments change (net sales) 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 1/18/2018	Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	25,784	32,674	(21)	31,881
Mexico	2,451	2,427	1	3,452
Indonesia	1,086	1,193	(9)	1,987
Japan	1,319	1,422	(7)	2,067
Netherlands	756	887	(15)	2,098
Top 5 importers	31,396	38,603	(19)	41,486
Total US soybean export sales	37,376	43,236	(14)	52,919
% of Projected	64%	73%		
Change from prior week ²	616	539		
Top 5 importers' share of U.S. soybean export sales	84%	89%		78%
USDA forecast, January 2018	58,856	59,237	99	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³FAS 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 1/18/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,284	2,034	12	2,620
Mexico	2,430	2,326	4	2,743
Philippines	2,220	2,099	6	2,395
Brazil	111	1,107	(90)	862
Nigeria	1,016	1,153	(12)	1,254
Korea	1,316	1,118	18	1,104
China	817	1,023	(20)	1,623
Taiwan	929	845	10	768
Indonesia	1,002	848	18	726
Colombia	520	666	(22)	635
Top 10 importers	12,644	13,217	(4)	14,729
Total US wheat export sales	20,122	22,437	(10)	22,804
% of Projected	76%	78%		
Change from prior week ²	427	853		
Top 10 importers' share of U.S. wheat export sales	63%	59%		65%
USDA forecast, January 2018	26,567	28,747	(8)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>. Total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales³FAS 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 01/25/18	Previous Week ¹	Current Week as % of Previous	2018 YTD	2017 YTD	2018 YTD as % of 2017 YTD	Last 4-weeks as % of:		2017 Total
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	387	274	141	905	623	145	145	124	14,805
Corn	287	213	135	727	793	92	92	146	10,928
Soybeans	206	560	37	1,246	1,255	99	99	88	13,246
Total	881	1,047	84	2,878	2,670	108	108	109	38,978
Mississippi Gulf									
Wheat	58	61	94	290	219	133	133	129	4,198
Corn	592	315	188	1,521	2,147	71	71	81	28,690
Soybeans	756	778	97	2,866	3,507	82	82	82	32,911
Total	1,406	1,154	122	4,677	5,873	80	80	84	65,800
Texas Gulf									
Wheat	121	87	138	279	295	94	94	141	6,354
Corn	0	31	0	31	116	27	27	52	733
Soybeans	0	0	n/a	0	0	n/a	n/a	0	292
Total	121	118	102	310	411	75	75	89	7,379
Interior									
Wheat	34	23	145	90	167	54	54	82	1,727
Corn	97	151	64	485	474	102	102	112	8,733
Soybeans	108	117	93	382	435	88	88	98	5,496
Total	239	291	82	957	1,076	89	89	103	15,956
Great Lakes									
Wheat	11	0	n/a	19	0	n/a	n/a	n/a	711
Corn	0	0	n/a	0	0	n/a	n/a	n/a	192
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	890
Total	11	0	n/a	19	0	n/a	n/a	n/a	1,793
Atlantic									
Wheat	0	0	n/a	0	0	n/a	n/a	0	46
Corn	0	0	n/a	0	0	n/a	n/a	n/a	32
Soybeans	32	42	77	148	338	44	44	46	1,996
Total	32	42	77	148	338	44	44	44	2,075
U.S. total from ports									
Wheat	610	446	137	1,583	1,303	122	122	124	27,841
Corn	976	710	137	2,764	3,529	78	78	97	49,308
Soybeans	1,102	1,497	74	4,642	5,535	84	84	81	54,831
Total	2,689	2,652	101	8,989	10,368	87	87	91	131,980

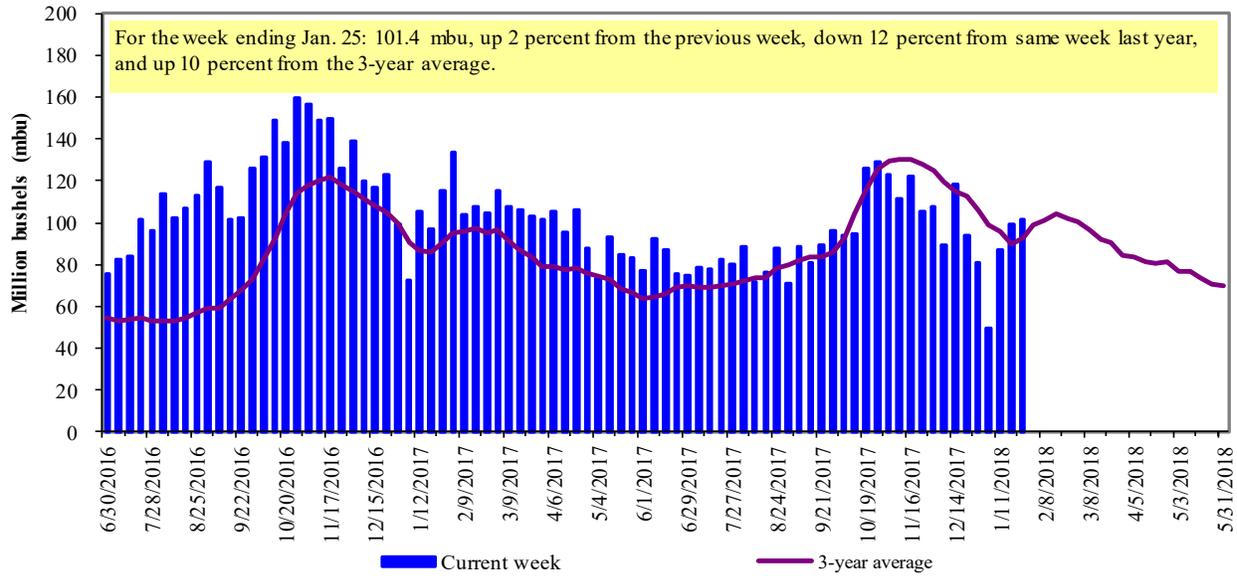
¹Data includes revisions from prior weeks; some regional and U.S. totals may not add exactly due to rounding.

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 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

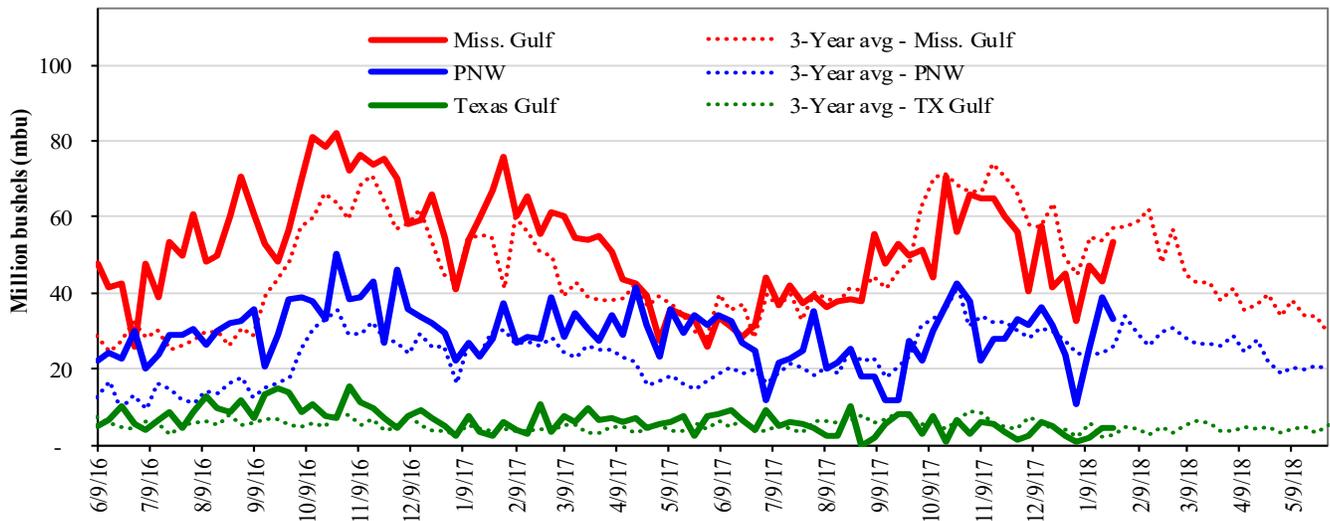
U.S. grain inspected for export (wheat, corn, and soybeans)



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 01/25/18 inspections (mbu):		Percent change from:				
Mississippi Gulf:	53.2	Last Week:	MS Gulf up 23	TX Gulf unchanged	U.S. Gulf up 21	PNW down 15
PNW:	33.1	Last Year (same week):	down 21	up 96	down 17	up 18
Texas Gulf:	4.4	3-yr avg. (4-wk. mov. Avg):	up 1	up 37	up 3	up 35

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

Ocean Transportation

Table 17

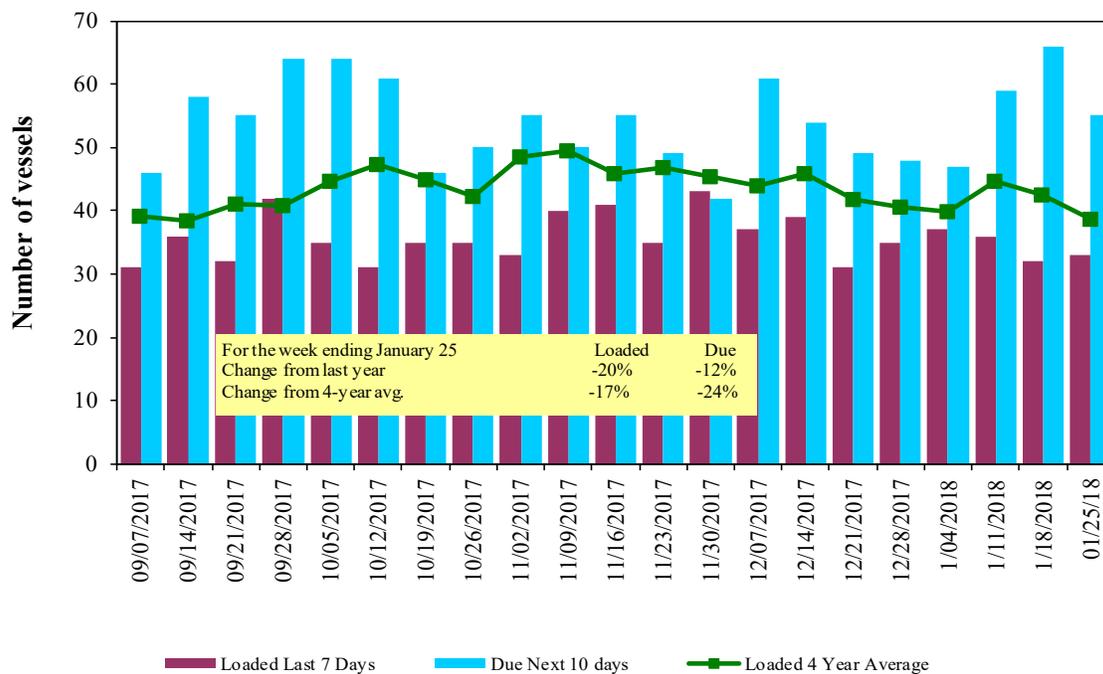
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/25/2018	55	33	55	21
1/18/2018	45	32	66	16
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

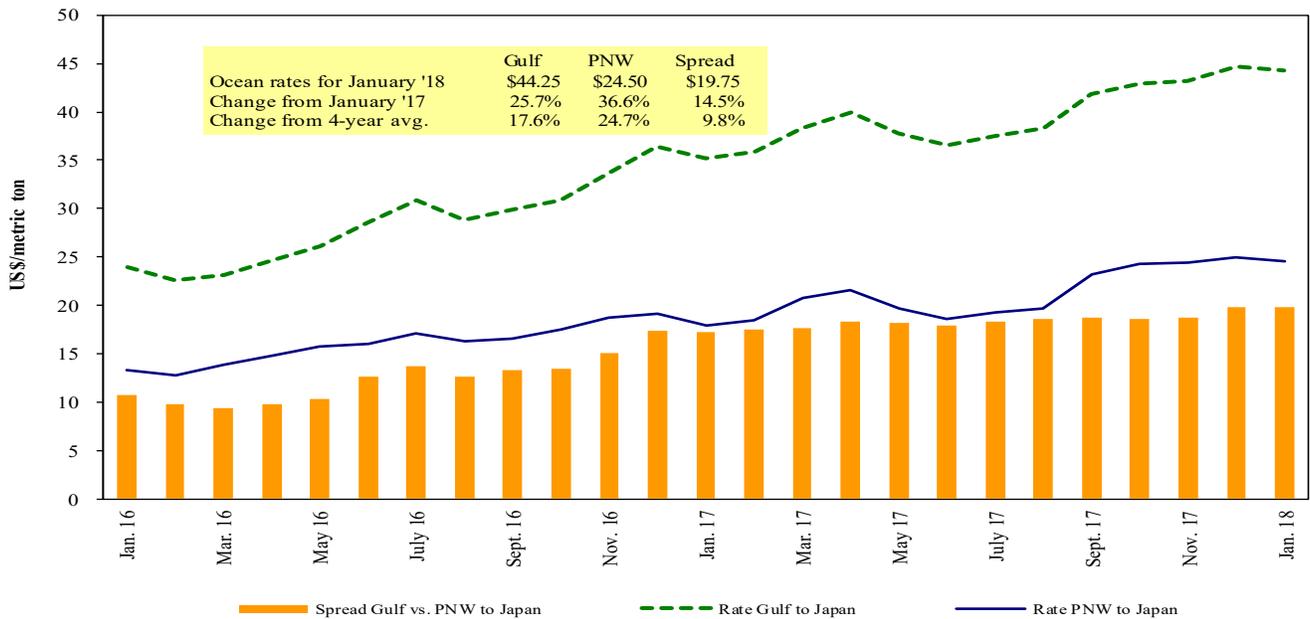
U.S. Gulf Vessel Loading Activity



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 01/27/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
Portugal	China	Heavy Grain	Feb/10	65,000	38.00
U.S. Gulf	China	Heavy Grain	Jan 1/10	60,000	45.50
Rouen	Morocco	Heavy Grain	Jan 6/12	30,000	15.00
U.S. Gulf	China	Heavy Grain	Dec 15/20	60,000	44.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	43.25
U.S. Gulf	China	Heavy Grain	Nov 27/Dec 5	47,700	40.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	Somalia	Sorghum	Dec 1/10	10,640	192.10*
PNW	China	Heavy Grain	Dec 23/30	60,000	22.25
PNW	China	Heavy Grain	Dec 15/24	60,000	23.75
PNW	South Korea	Heavy Grain	Dec 14/20	60,000	24.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	31.90
Brazil	S. Korea	Heavy Grain	Nov 22/29	63,000	33.25

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

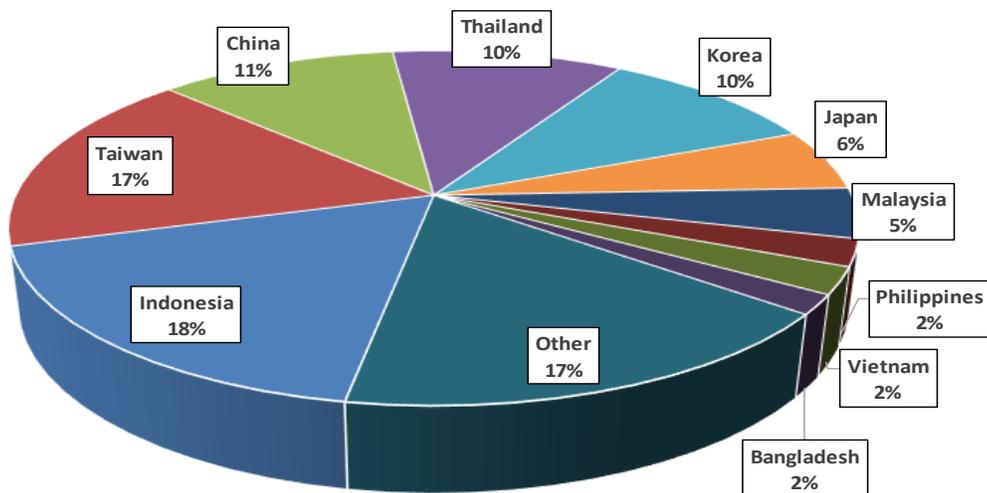
* 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2016, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2016 went to Asia, of which 10 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-September 2017

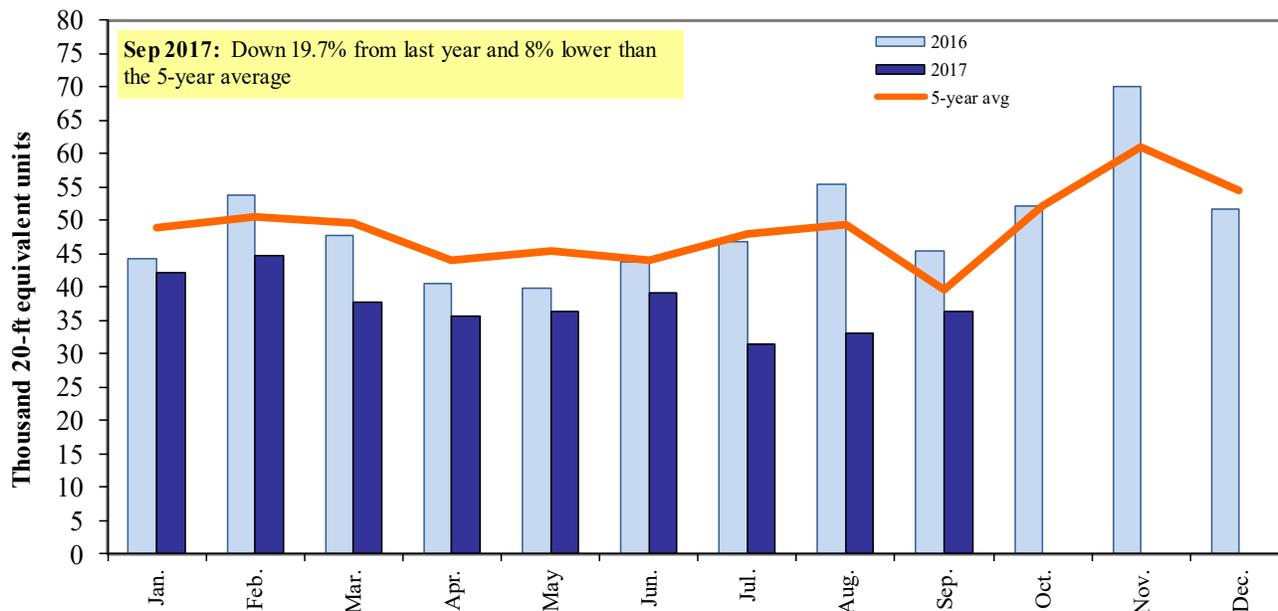


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

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