



Grain Transportation Report

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

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WEEKLY HIGHLIGHTS

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2018 Annual Maintenance Navigation Lock Closure For Columbia and Snake Rivers Begins in March

In March, the U.S. Army Corps of Engineers will close several locks on the Columbia and Snake Rivers for annual maintenance. The affected locks include: Bonneville Lock & Dam (L&D), The Dalles L&D, John Day L&D, and McNary L&D on the Columbia River; and Ice Harbor L&D, Lower Monumental L&D, Little Goose L&D and Lower Granite L&D on the Snake River. All these locks will close on March 3. Bonneville, McNary, Ice Harbor, and Lower Monumental will reopen on March 18, while The Dalles, John Day, Little Goose, and Lower Granite will reopen on March 25. The Columbia-Snake River System supports more than 49 million tons of international trade, as well as more than 40,000 local jobs connected to trade, according to the Pacific Northwest Waterways Association.

Union Pacific Begins Construction on Brazos Yard

The Union Pacific's (UP) new Brazos facility, which is currently under construction in Robertson County, TX, will be a classification yard able to switch up to 1,300 rail cars per day. Once completed, it will be one of the highest capacity yards on UP's network. In announcing the facility, UP noted the facility is poised to address customer demand and economic growth across the region and said the location is strategic for sending and receiving shipments across its network, including cross border movements. UP said the \$550 million rail yard is the largest capital investment in a single facility at any point during its history and will feature the latest operating efficiency, technology, and innovation.

Grain Inspections Up; Pacific Northwest Remains Above Average

For the week ending February 1, **total inspections of grain** (corn, wheat, and soybeans) for export, from all major U.S. export regions, reached 2.88 million metric tons (mmt); up 5 percent from the previous week, down 19 percent from last year, and 9 percent above the 3-year average. Inspections of corn and soybeans were up from the previous week, increasing 6 and 22 percent, respectively. Soybean shipments to Asia rebounded from the past week. Wheat inspections, however, dropped 26 percent from the past week. Pacific Northwest grain inspections increased 19 percent from the previous week and remained well above average. Mississippi Gulf inspections decreased 6 percent from the past week. Outstanding (unshipped) export sales were up from the previous week for corn, but down for wheat and soybeans.

Snapshots by Sector

Export Sales

For the week ending January 25, **unshipped balances** of wheat, corn, and soybeans totaled 33.9 mmt; down 13 percent from the same time last year. Net weekly **wheat export sales** were .289 mmt, down 32 percent from the previous week. Net **corn export sales** were 1.85 mmt; up 28 from the previous week. Net **soybean export sales** were .359 mmt for the same period; down 42 percent from the previous week.

Rail

U.S. Class I railroads originated 22,538 **grain carloads** for the week ending January 27; down 3 percent from the previous week, down 1 percent from last year, and down 2 percent from the 3-year average.

Average February shuttle **secondary railcar** bids/offers per car were \$66 above tariff for the week ending February 1; down \$129 from last week, and \$1,051 lower than last year. Average non-shuttle secondary railcar bids/offers were \$19 above tariff; \$231 lower than last year. There were no non-shuttle bids/offers last week.

Barge

For the week ending February 3, **barge grain movements** totaled 664,089 tons; 25 percent higher than the previous week and down 10 percent from the same period last year.

For the week ending February 3, 409 grain barges **moved down river**, up 28 percent from last week. There were 914 grain barges **unloaded in New Orleans**; 17 percent higher than the previous week.

Ocean

For the week ending February 1, 40 **ocean-going grain vessels** were loaded in the Gulf, 15 percent less than the same period last year. Sixty-two vessels are expected to be loaded within the next 10 days, 5 percent less than the same period last year.

For the week ending February 1, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.25 per metric ton; 1 percent less than the previous week. The cost of shipping from the PNW to Japan was \$24.50 per metric ton; 2 percent less than the previous week.

Fuel

During the week ending February 5, average **diesel fuel prices** increased 2 cents from previous week at \$3.09 per gallon; 53 cents higher than the same week last year

Feature Article/Calendar

Strong Bulk Shipments Pushed Ocean Freight Rates Up in 2017, but What Lies Ahead?

Ocean freight rates for shipping bulk commodities, including grains, increased in 2017 as compared to 2016 amid strong bulk shipment volumes. The average ocean freight rates for shipping bulk grain from the U.S. Gulf and Pacific Northwest (PNW) to Japan in 2017 were \$39.33 and \$21.05 per metric ton (mt); 39 and 32 percent higher than the previous year, respectively. The cost of shipping grain from the U.S. Gulf to Europe was \$15.47 per mt, 12 percent more than the previous year. However, with excess vessel supply still in the market, a slower pace of vessel deliveries is shrinking the gap between vessel supply and demand.

A Synopsis of 2017 Ocean Rates:

First Quarter - Ocean freight rates for shipping bulk grains increased during the first quarter of 2017 compared to the previous quarter, and the same period a year earlier, but were lower than the 4-year average. The rates for shipping bulk grain from the U.S. Gulf to Japan averaged \$36.45 per metric ton (mt); an 8 and 57 percent increase from the previous quarter and the same period last year, respectively, but 6 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest (PNW) to Japan averaged \$19.02 per mt; 3 and 43 percent above the previous quarter, and the same period last year, respectively, and a 10 percent decline from the 4-year average. The rise in ocean rates during the first quarter was partly due to strong grain movements and increased demand for other bulk commodities, such as coal and iron ore. Grain inspected for export, and ocean-going grain vessel loading activity in the U.S. Gulf and the PNW during the first quarter, surpassed the previous year's levels (March 23, 2017 [Grain Transportation Report \(GTR\)](#)). In addition, there was increasing demand for coal and iron ore/steel due to "restocking" in China (April 6, 2017 [GTR](#)).

Second Quarter - Ocean freight rates for shipping bulk grain for grain routes continued to increase during the second quarter, surpassing the previous quarter and the same period a year earlier. While rates from the Gulf to Japan were higher than the 4-year average, the rates from the Pacific Northwest (PNW) to Japan and the rates from the Gulf to Europe were less than the 4-year average. The rates for shipping a metric ton (mt) of grain from the United States Gulf to Japan averaged \$38.08; 5 percent above the previous quarter, 44 percent above same period last year, and 2 percent above the 4-year average. The rates for shipping from the PNW to Japan averaged 19.93 per mt, which was 5 and 29 percent more than the previous quarter and same period a year ago, respectively, but 3 percent less than the 4-year average. It cost \$14.49 per mt to ship grain from the U.S. Gulf to Europe. This was 2 percent less than the previous quarter, 6 percent more than last year, and 15 percent less than the 4-year average. The increase in ocean rates during the quarter was partly due to continued strong grain movements and grain vessel loading activity. Grain (wheat, corn, and soybeans) inspected for exports from all major U.S. ports reached 29.8 million metric tons; 23 percent above last year and 37 percent above the 5-year average (July 20, 2017 [GTR](#)). The U.S. Gulf loaded 447 ocean-going grain vessels during the quarter, compared to 437 during the same period last year. In the PNW, 272 ocean-going vessels were loaded or waiting to be loaded, compared to 172 vessels during the previous year.

Third Quarter - Strong iron ore, coal, and grain shipments continued to push up ocean freight rates during the quarter. Ocean freight rates for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan averaged \$39.23 during the quarter. This was 3 and 31 percent more than the previous quarter and same period a year ago, respectively, but unchanged from the 4-yr average. The cost of shipping from the Pacific Northwest (PNW) to Japan averaged \$20.71 per mt; 4 and 25 percent more than the previous quarter and same period a year ago, but 4 percent less than the 4-yr average. The cost of shipping from the U.S. Gulf to Europe, at \$15.03 per mt, was 4 percent higher than the previous quarter, unchanged from a year earlier, and 20 percent less than the 4-yr average. In August, increased construction activities in China led to high steel production, as steel prices reached their highest level since 2014 (October 26, 2017 [GTR](#)). The increased steel production depleted iron ore inventories at the ports to about 124 million tons at the end of August. This in turn led to increased demand for iron ore and coking coal imports by China. Steel consumption also improved in India and Europe. In addition to increased demand for iron and coking coal, there was also increasing demand for grains and other bulk products in some Asian countries, such as Japan and South Korea. In addition, United States corn exports to the European Union (EU) almost doubled during the first-half of 2017 compared to the same period last year due to high demand induced by low global corn prices.

Fourth Quarter - Ocean freight rates continued to increase through the fourth quarter (see table and graph below). The robust thermal coal and grain trade boosted the demand for Panamax vessels and pushed up the rates. The winter season increased the demand for thermal coal imports for restocking in European and Asian countries.

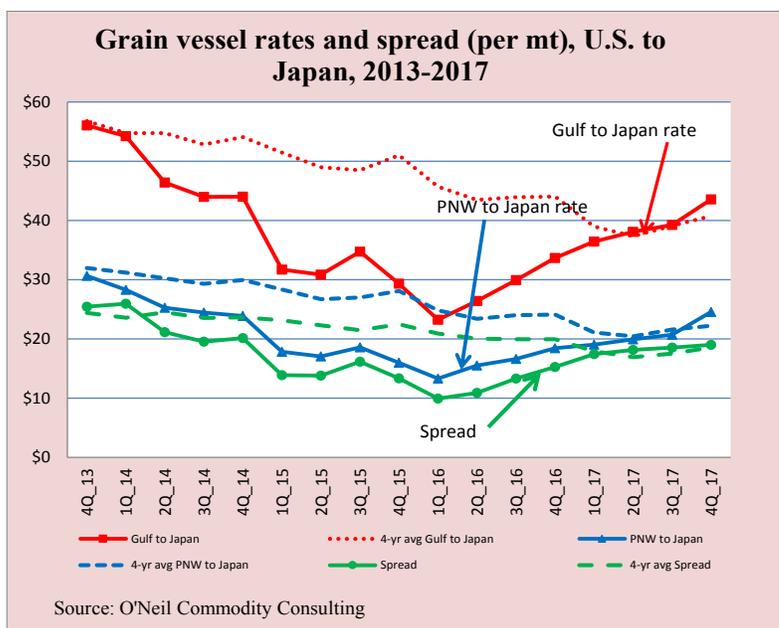
Ocean freight rates for grain routes during the fourth quarter 2017							
Route	Oct.	Nov.	Dec.	4th quarter 2017	Change from		
					3rd qtr '17	4th qtr '16	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	42.88	43.13	44.67	43.56	11	29	7
PNW to Japan	24.31	24.44	24.92	24.56	19	33	10
Spread	18.57	18.69	19.75	19.00	3	25	3
U.S. Gulf to Europe	17.31	17.13	18.33	17.59	17	19	-4

Source: O'Neil Commodity Consulting

Amid higher domestic prices and rising demand for heating in China, the demand for thermal coal imports remained strong. There was also increased demand for thermal coal imports in Japan and South Korea, which contributed to higher ocean rates. In October 2017, South Korea imported 27 percent more coal than in 2016. The grain trade was also strong during the fourth quarter. According to *Drewry Maritime Research*, Russian wheat exports to Saudi Arabia increased 20 percent in October 2017 compared to 2016. In addition, lowered import duties boosted corn, sorghum, and rye imports by the European countries.

Market Analysis and Outlook

Thus far in 2018, the ocean freight rates for shipping bulk grain from the U.S. Gulf and PNW to Japan during January averaged \$44.25 and \$24.50 per metric ton, respectively. These were relatively the same levels as the end of last quarter in 2017. Many factors potentially may influence the direction of ocean rates in 2018. For instance, policy in China will play a crucial role in the direction of dry bulk ocean freight rates, as they undertake efforts to curb pollution and restrict steel and aluminum production. Lower production levels will reduce imports of low grade iron ore and bauxite, at least in the short term. In addition, amid strong production and supply from the United States, Brazil, and Russia, there is a positive outlook for global grain trade, which may boost rates for Panamax ships. According to *Drewry Maritime Research*, there is a positive outlook for the dry bulk market in general. This may affect ship owners' decision for scrapping their ships even though scrap prices are high. Despite the currently low scheduled delivery of new ships, the slow rate of demolition and attractiveness of investments in newly built vessels may continue to tilt the demand-supply balance towards excess vessel supply. The dry bulk fleet remained relatively stable through December 2017 at about 817 million deadweight tonnage. The orderbook as a percent of fleet was also stagnant at 10 percent, indicating a stable growth rate in vessel fleet. However, the demand-supply gap may shrink in the long run as International Maritime Organization regulations speed up demolition. surajudeen.olowolayemo@ams.usda.gov



Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
02/07/18	207	274	217	202	198	174
01/31/18	206	273	222	199	200	177

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)

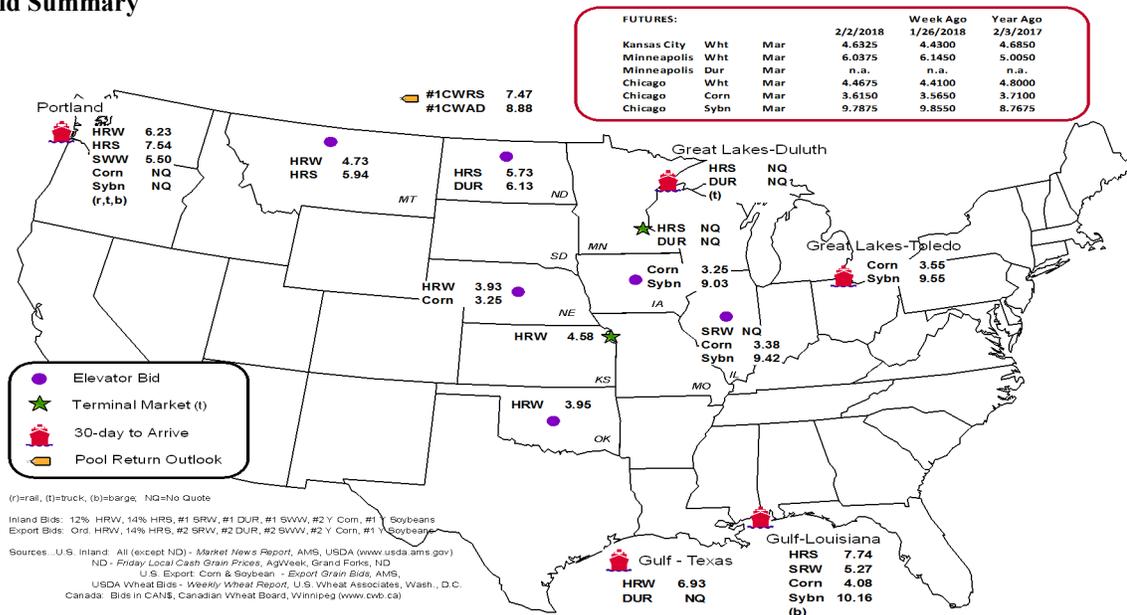
Commodity	Origin--Destination	2/2/2018	1/26/2018
Corn	IL--Gulf	-0.70	-0.70
Corn	NE--Gulf	-0.83	-0.83
Soybean	IA--Gulf	-1.13	-1.13
HRW	KS--Gulf	-2.35	-2.55
HRS	ND--Portland	-1.81	-1.72

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			
01/31/2018 ^p	521	1,099	7,999	256	9,875	1/27/2018	1,984
01/24/2018 ^r	973	1,719	5,789	338	8,819	1/20/2018	2,013
2018 YTD ^r	3,035	6,691	30,831	1,146	41,703	2018 YTD	8,808
2017 YTD ^r	4,227	9,235	30,360	4,052	47,874	2017 YTD	10,652
2018 YTD as % of 2017 YTD	72	72	102	28	87	% change YTD	83
Last 4 weeks as % of 2017 ²	81	80	109	32	95	Last 4wks % 2017	90
Last 4 weeks as % of 4-year avg. ²	74	99	117	32	102	Last 4wks % 4 yr	105
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

¹ Data is incomplete as it is voluntarily provided

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

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

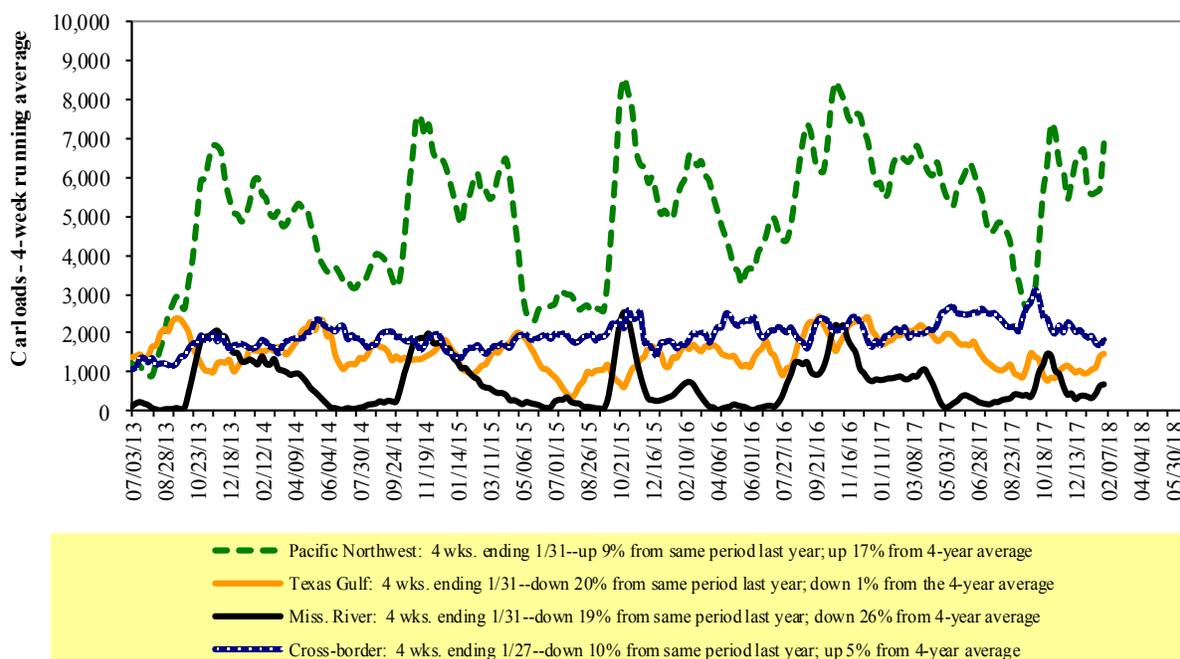
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

For the week ending: 1/27/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,871	2,353	11,561	1,164	5,589	22,538	3,358	4,019
This week last year	1,898	3,006	10,757	1,197	5,928	22,786	3,944	4,607
2018 YTD	7,530	9,735	45,436	4,087	20,596	87,384	14,033	16,464
2017 YTD	7,990	12,474	44,978	4,332	23,487	93,261	14,602	16,082
2018 YTD as % of 2017 YTD	94	78	101	94	88	94	96	102
Last 4 weeks as % of 2017*	94	78	101	94	88	94	96	102
Last 4 weeks as % of 3-yr avg**	86	78	103	109	92	95	94	95
Total 2017	89,465	142,829	578,964	50,223	289,574	1,151,055	198,775	244,766

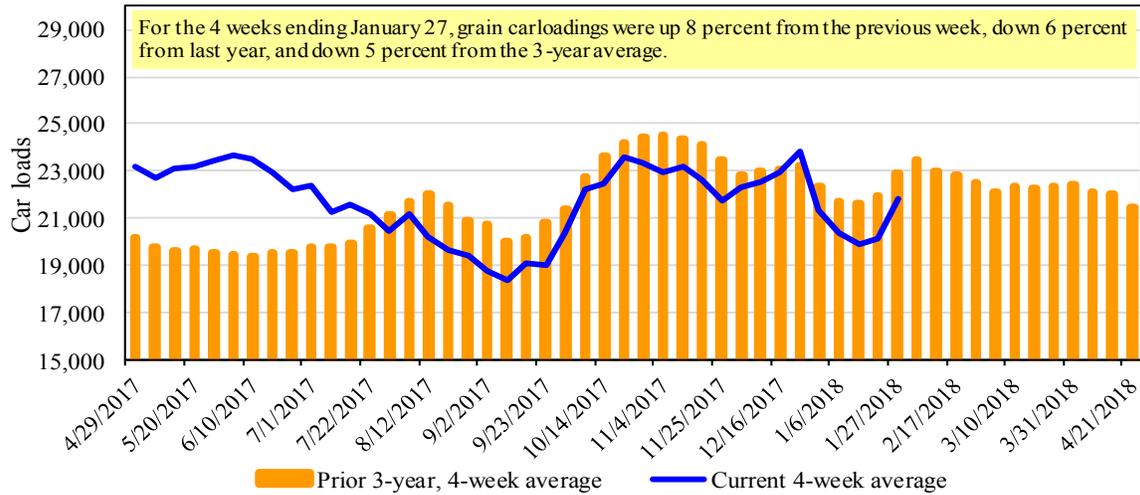
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 2/1/2018		Delivery period							
		Feb-18	Feb-17	Mar-18	Mar-17	Apr-18	Apr-17	May-18	May-17
BNSF ³	COT grain units	0	181	no bids	86	no bids	0	no bids	0
	COT grain single-car ⁵	0	435	0	203	0	36	0	27
UP ⁴	GCAS/Region 1	10	no bids	n/a	n/a				
	GCAS/Region 2	no bids	no bids	no bids	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.

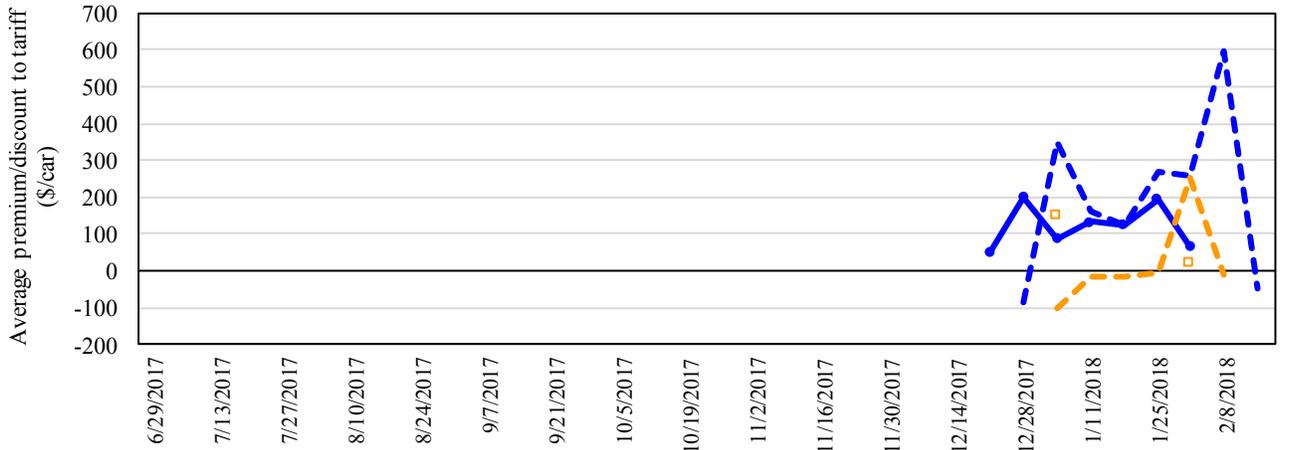
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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



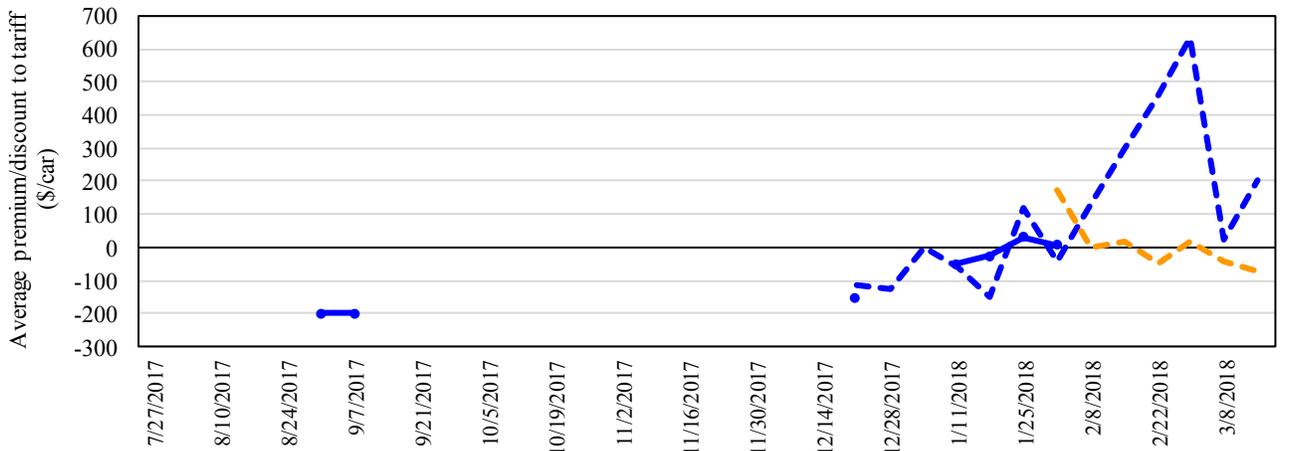
	2/1/2018	BNSF	UP
Non-Shuttle	-\$13	\$50	
Shuttle	\$231	-\$100	

—●— 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 last week. Average Non-Shuttle bids/offers this week are \$131 below the peak. Average Shuttle bids/offers fell \$129 this week and are \$134 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 2018, Secondary Market



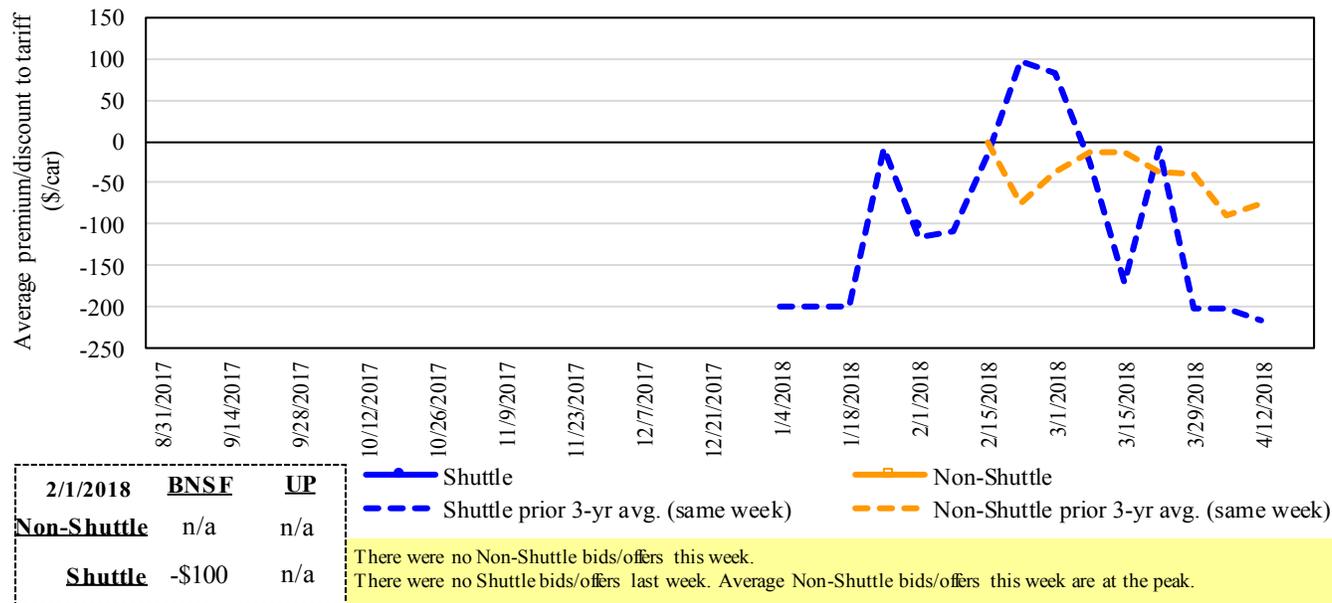
	2/1/2018	BNSF	UP
Non-Shuttle	n/a	n/a	
Shuttle	\$117	-\$100	

—●— 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 \$23 this week and are \$23 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 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: 2/1/2018		Delivery period					
		Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Non-shuttle	BNSF-GF	(13)	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	(413)	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	n/a	n/a	n/a	n/a	n/a	n/a
Change from same week 2017	(50)	n/a	n/a	n/a	n/a	n/a	
Shuttle	BNSF-GF	231	117	(100)	(200)	n/a	n/a
	Change from last week	(152)	(33)	n/a	n/a	n/a	n/a
	Change from same week 2017	(1769)	(661)	(225)	n/a	n/a	n/a
	UP-Pool	(100)	(100)	n/a	n/a	(163)	n/a
	Change from last week	(106)	(12)	n/a	n/a	n/a	n/a
Change from same week 2017	(333)	(50)	n/a	n/a	n/a	n/a	

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

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

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

Sources: Transportation and Marketing Programs/AMS/USDA

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

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

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

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

Date: February, 2018			Fuel		Percent		
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
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.

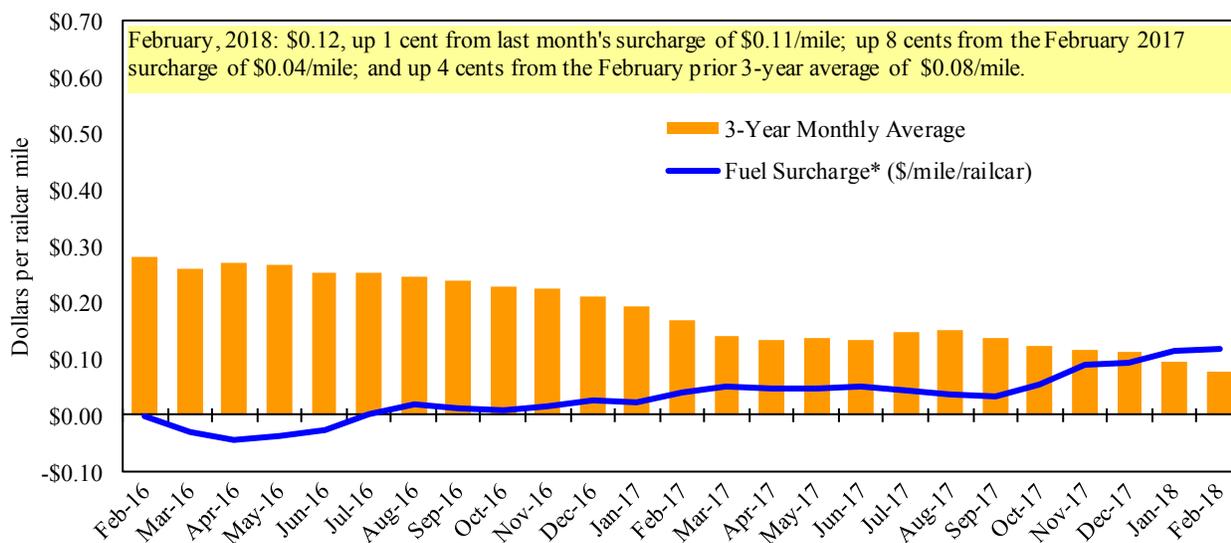
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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.

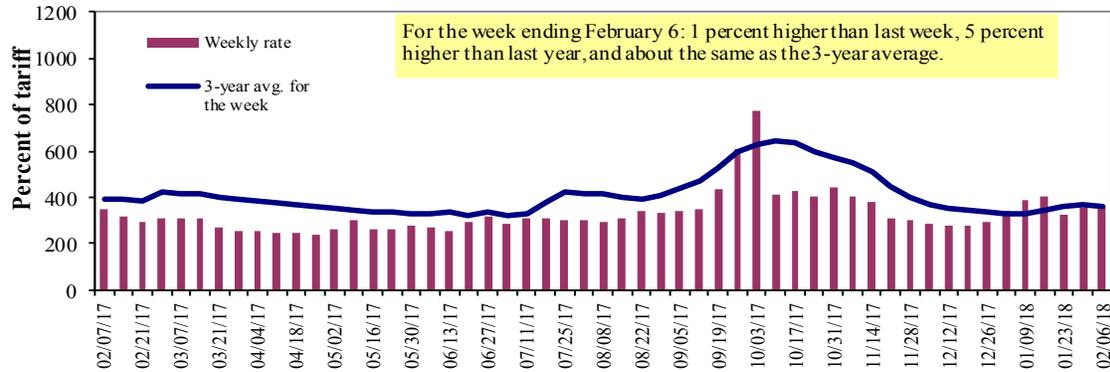
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: www.bnsf.com, www.cn.ca, www.cpr.ca, www.csx.com, www.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
Rate ¹	2/6/2018	-	-	363	278	338	338	215
	1/30/2018	-	-	358	288	308	308	210
\$/ton	2/6/2018	-	-	16.84	11.09	15.85	13.66	6.75
	1/30/2018	-	-	16.61	11.49	14.45	12.44	6.59
Current week % change from the same week:								
	Last year	-	-	5	14	25	23	8
	3-year avg. ²	-	-	0	6	19	18	0
Rate ¹	March	-	-	315	230	268	268	200
	May	368	320	303	225	240	240	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:

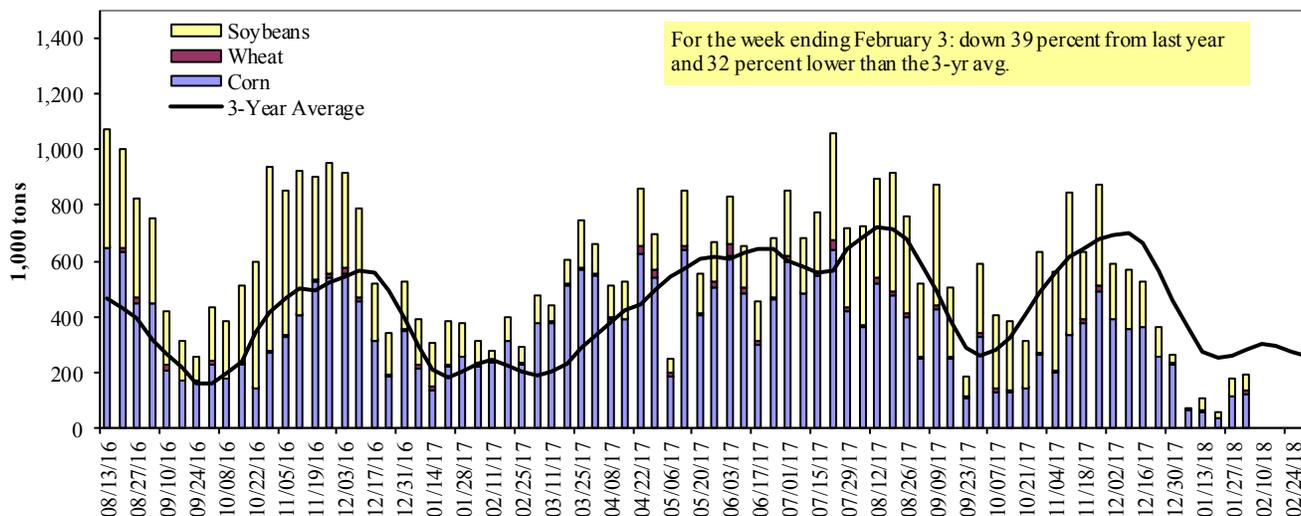
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$$

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



Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 02/03/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	3	0	2	0	5
Alton, IL (L26)	129	0	70	0	199
Granite City, IL (L27)	124	10	60	0	193
Illinois River (L8)	147	0	98	0	245
Ohio River (L52)	136	13	239	5	394
Arkansas River (L1)	0	25	52	0	77
Weekly total - 2018	260	48	351	5	664
Weekly total - 2017	376	33	326	7	742
2018 YTD ¹	815	110	1,255	9	2,188
2017 YTD	1,600	170	1,703	77	3,550
2018 as % of 2017 YTD	51	65	74	11	62
Last 4 weeks as % of 2017 ²	57	76	80	16	68
Total 2017	22,242	2,210	16,123	360	40,936

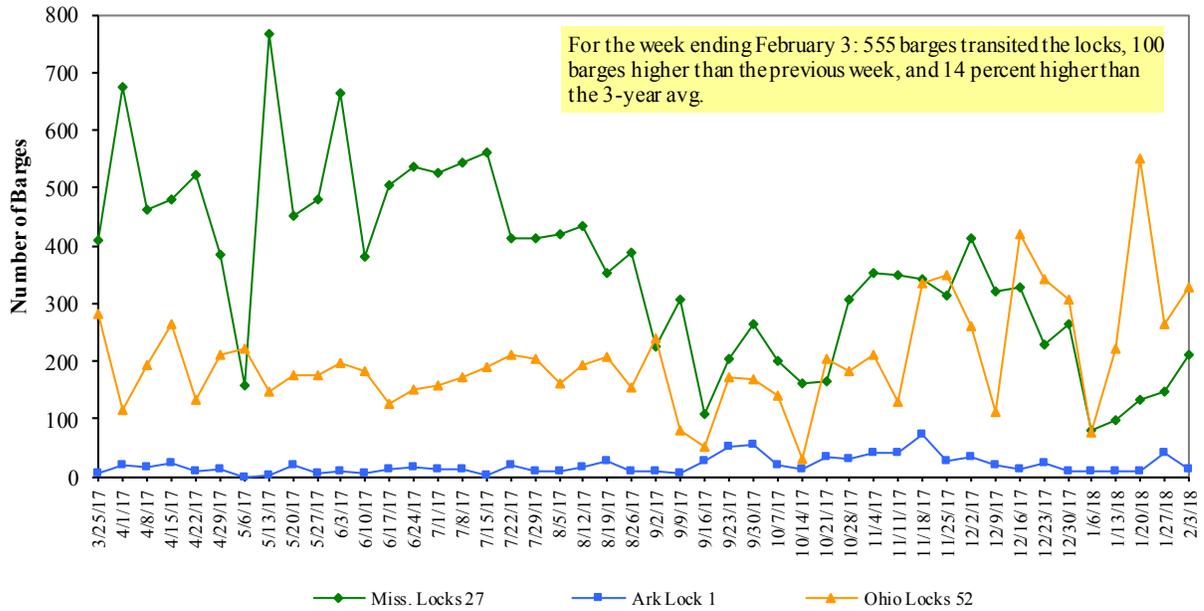
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2017.

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

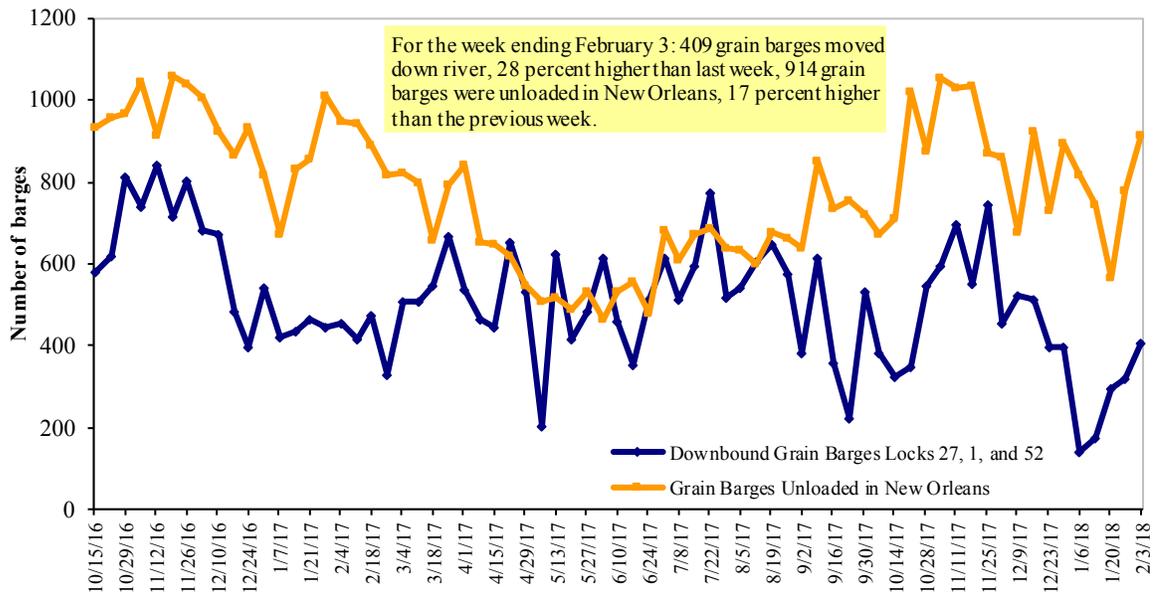
Source: U.S. Army Corps of Engineers

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 2/5/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.133	0.021	0.515
	New England	3.188	0.028	0.527
	Central Atlantic	3.324	0.018	0.561
	Lower Atlantic	2.988	0.020	0.480
II	Midwest ²	3.044	0.014	0.552
III	Gulf Coast ³	2.874	0.006	0.471
IV	Rocky Mountain	2.981	0.014	0.466
V	West Coast	3.460	0.026	0.604
	West Coast less California	3.144	0.024	0.396
	California	3.711	0.028	0.767
Total	U.S.	3.086	0.016	0.528

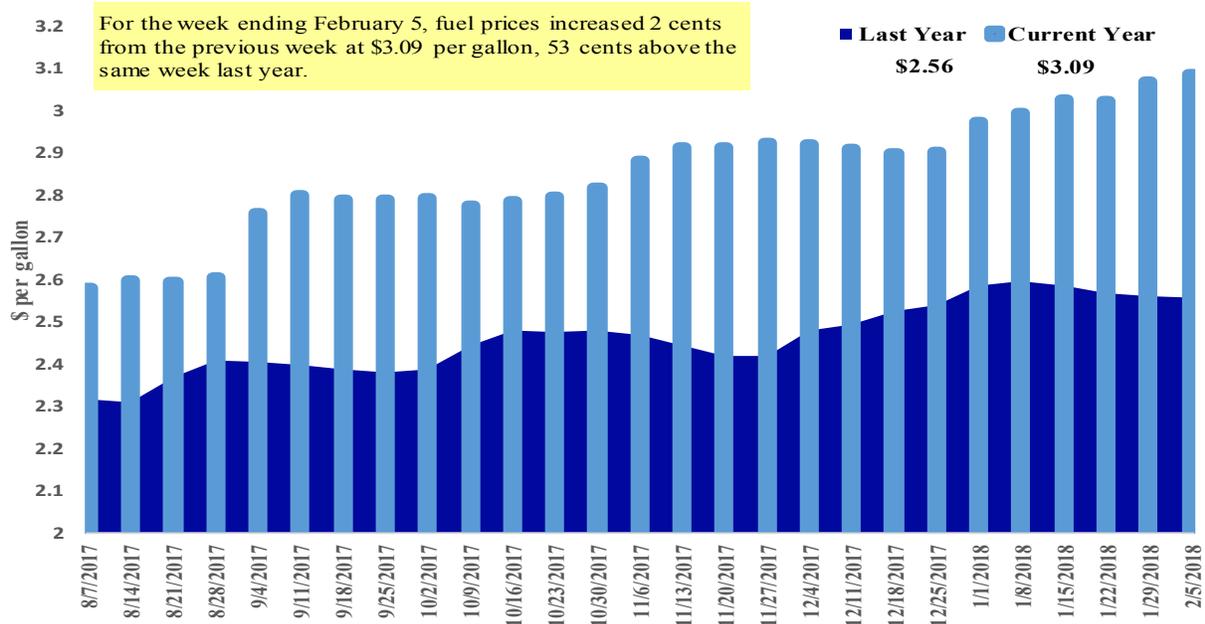
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
1/25/2018	2,033	695	1,420	916	88	5,152	18,441	10,302	33,894
This week year ago	2,245	640	2,553	1,335	137	6,910	20,541	11,563	39,014
Cumulative exports-marketing year²									
2017/18 YTD	6,249	1,371	3,914	3,511	214	15,259	13,811	33,293	62,363
2016/17 YTD	6,977	1,336	4,786	2,614	265	15,978	19,677	38,824	74,479
YTD 2017/18 as % of 2016/17	90	103	82	134	81	96	70	86	84
Last 4 wks as % of same period 2016/17	90	113	59	79	48	78	83	97	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 1/25/2018			% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
Mexico	10,254	10,302	(0)	12,297
Japan	5,348	6,185	(14)	11,450
Korea	1,624	3,306	(51)	4,494
Colombia	2,370	2,722	(13)	4,179
Peru	1,851	1,934	(4)	2,693
Top 5 Importers	21,448	24,449	(12)	35,113
Total US corn export sales	32,252	40,218	(20)	49,308
% of Projected	66%	69%		
Change from prior week²	1,851	1,144		
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/esrquery/>. 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 1/25/2018	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	26,241	33,254	(21)	31,881
Mexico	2,463	2,506	(2)	3,452
Indonesia	1,114	1,239	(10)	1,987
Japan	1,375	1,480	(7)	2,067
Netherlands	832	1,029	(19)	2,098
Top 5 importers	32,025	39,507	(19)	41,486
Total US soybean export sales	43,595	50,388	(13)	52,919
% of Projected	74%	85%		
Change from prior week ²	359	547		
Top 5 importers' share of U.S. soybean export sales	73%	78%		78%
USDA forecast, January 2018	58,856	59,237	99	

(n) indicates negative number.

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/esrquery/. Total commitments change (net sales) 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 1/25/2018	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	2,376	2,036	17	2,620
Mexico	2,495	2,404	4	2,743
Philippines	2,258	2,149	5	2,395
Brazil	111	1,122	(90)	862
Nigeria	1,016	1,153	(12)	1,254
Korea	1,316	1,118	18	1,104
China	847	1,023	(17)	1,623
Taiwan	929	889	5	768
Indonesia	1,005	848	19	726
Colombia	519	677	(23)	635
Top 10 importers	12,872	13,417	(4)	14,729
Total US wheat export sales	20,411	22,888	(11)	22,804
% of Projected	77%	80%		
Change from prior week ²	289	451		
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.

¹ Based on FAS Marketing Year Ranking Reports for 2016/17 - 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 (net sales) 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 02/01/18	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	161	387	41	1,066	1,050	101	117	127	14,805
Corn	389	287	136	1,116	917	122	141	218	10,928
Soybeans	496	206	240	1,741	1,713	102	107	97	13,246
Total	1,046	881	119	3,923	3,680	107	118	126	38,978
Mississippi Gulf									
Wheat	64	58	112	354	323	110	100	111	4,198
Corn	512	609	84	2,050	2,931	70	66	85	28,690
Soybeans	769	759	101	3,639	4,626	79	81	87	32,911
Total	1,346	1,426	94	6,043	7,879	77	76	88	65,800
Texas Gulf									
Wheat	186	121	154	464	423	110	114	176	6,354
Corn	0	0	n/a	31	144	22	27	38	733
Soybeans	0	0	n/a	0	0	n/a	n/a	0	292
Total	186	121	154	496	567	87	94	118	7,379
Interior									
Wheat	40	35	114	132	192	69	85	131	1,727
Corn	153	98	156	645	641	101	97	122	8,733
Soybeans	89	132	68	495	552	90	91	105	5,496
Total	283	265	107	1,272	1,385	92	93	116	15,956
Great Lakes									
Wheat	0	11	0	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	0	11	0	19	0	n/a	n/a	n/a	1,793
Atlantic									
Wheat	0	0	n/a	0	35	0	0	0	46
Corn	0	0	n/a	0	0	n/a	n/a	n/a	32
Soybeans	18	32	55	166	381	44	43	44	1,996
Total	18	32	55	166	416	40	39	41	2,075
U.S. total from ports									
Wheat	451	612	74	2,036	2,024	101	110	132	27,841
Corn	1,055	994	106	3,841	4,633	83	83	110	49,308
Soybeans	1,372	1,129	122	6,042	7,271	83	86	87	54,831
Total	2,878	2,735	105	11,919	13,928	86	88	100	131,980

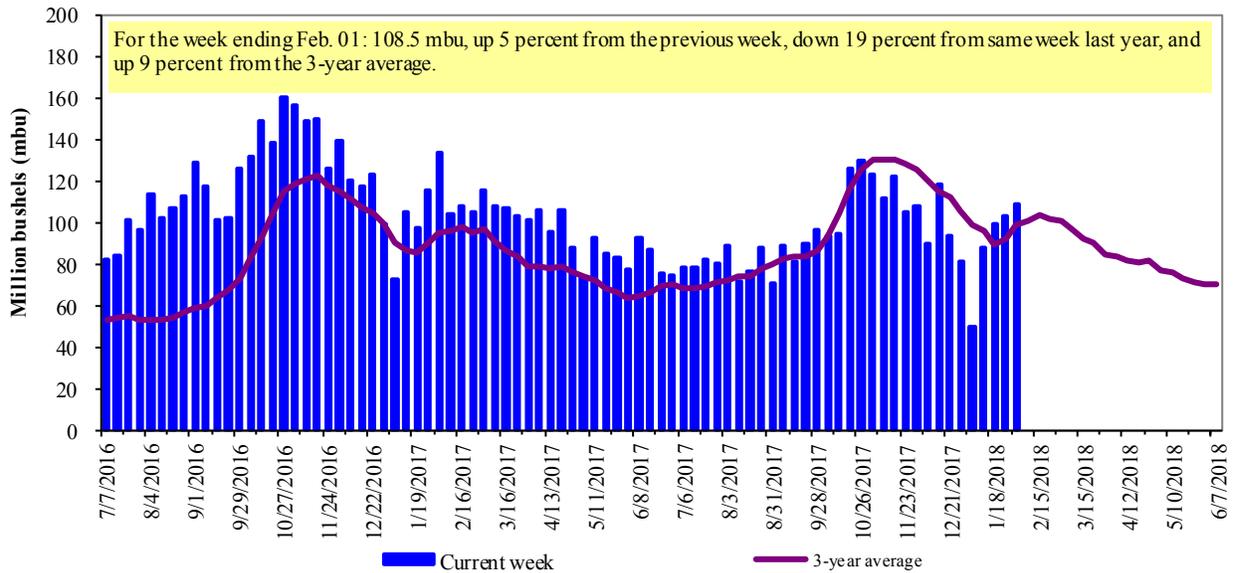
¹ Data includes revisions from prior weeks; some regional and U.S. totals may not add exactly due to rounding.

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)

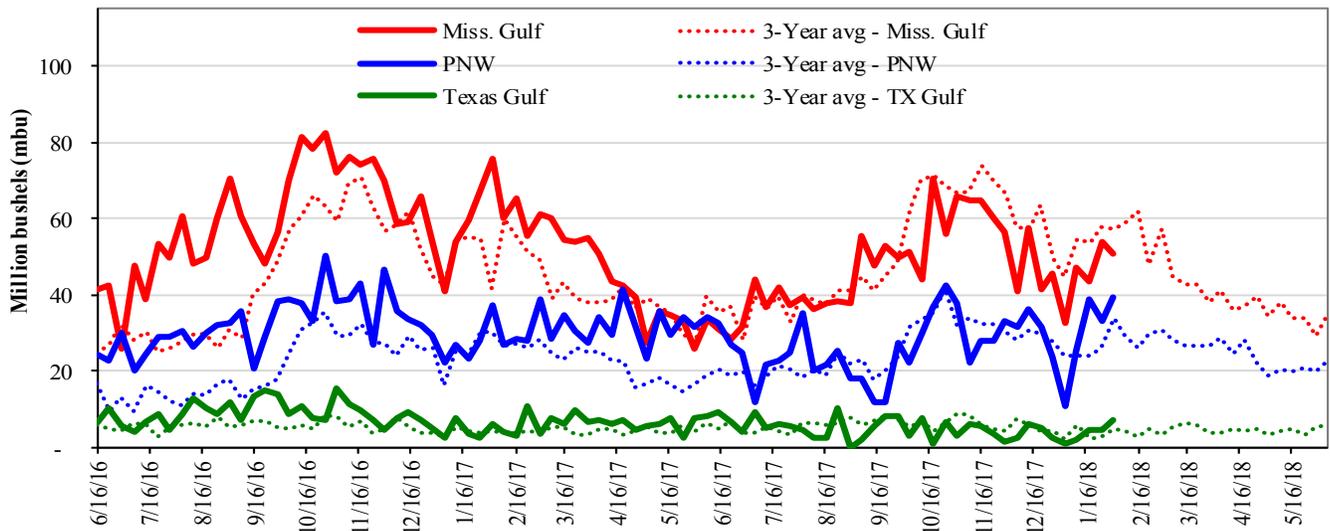


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 02/01/18 inspections (mbu):		Percent change from:				
		Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	50.8	down 6		up 54	down 1	up 19
PNW:	39.4	Last Year (same week):	down 33	up 17	down 29	up 5
Texas Gulf:	6.8	3-yr avg. (4-wk. mov. Avg):	down 9	up 80	down 3	up 46

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

Ocean Transportation

Table 17

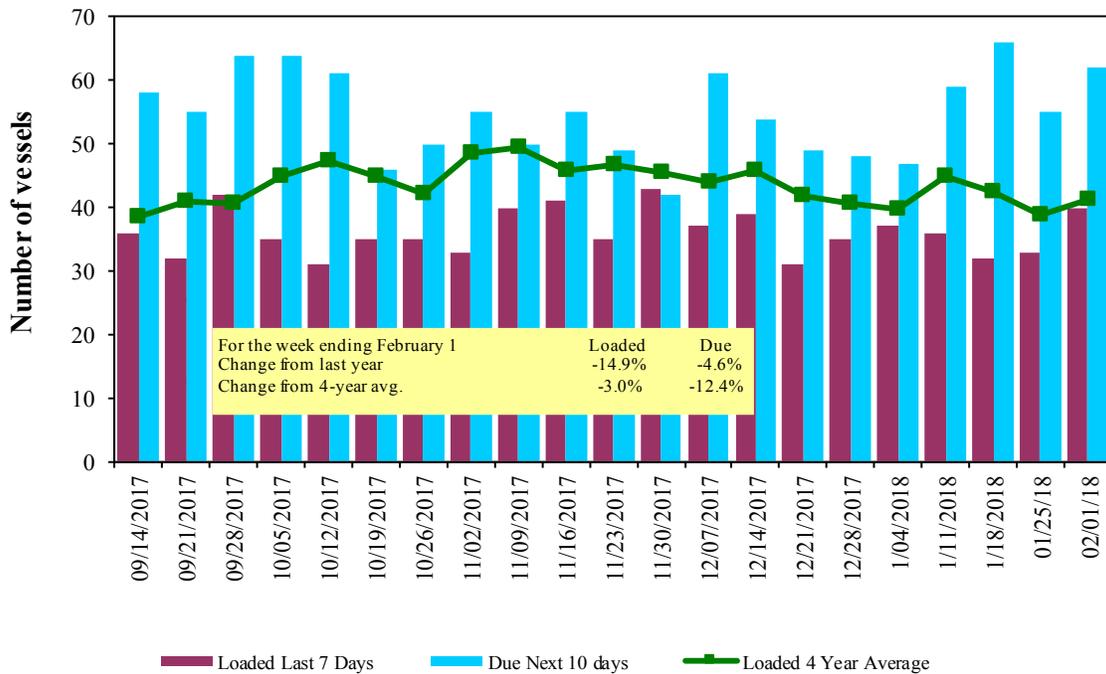
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
2/1/2018	62	40	62	15
1/25/2018	55	33	55	21
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

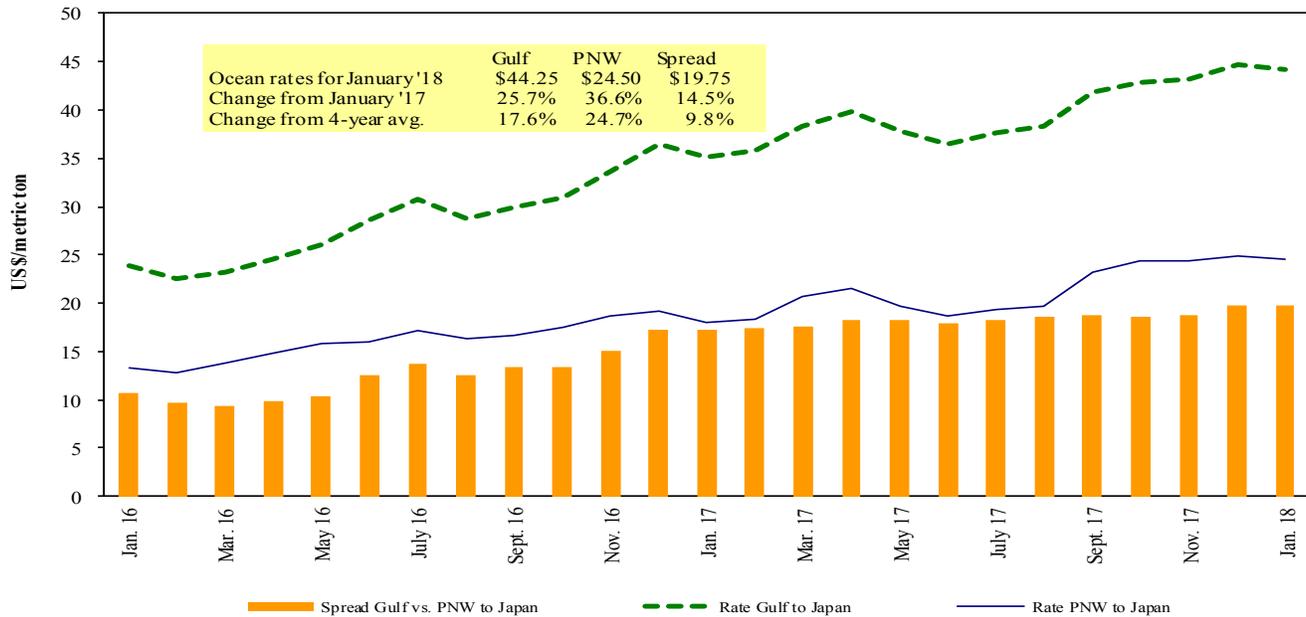
U.S. Gulf Vessel Loading Activity



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 02/03/2018

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	South 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

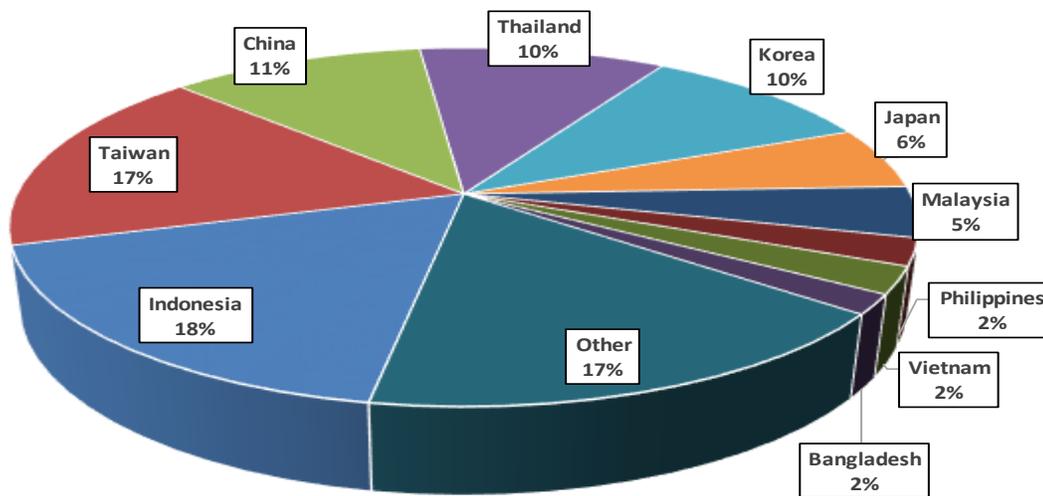
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

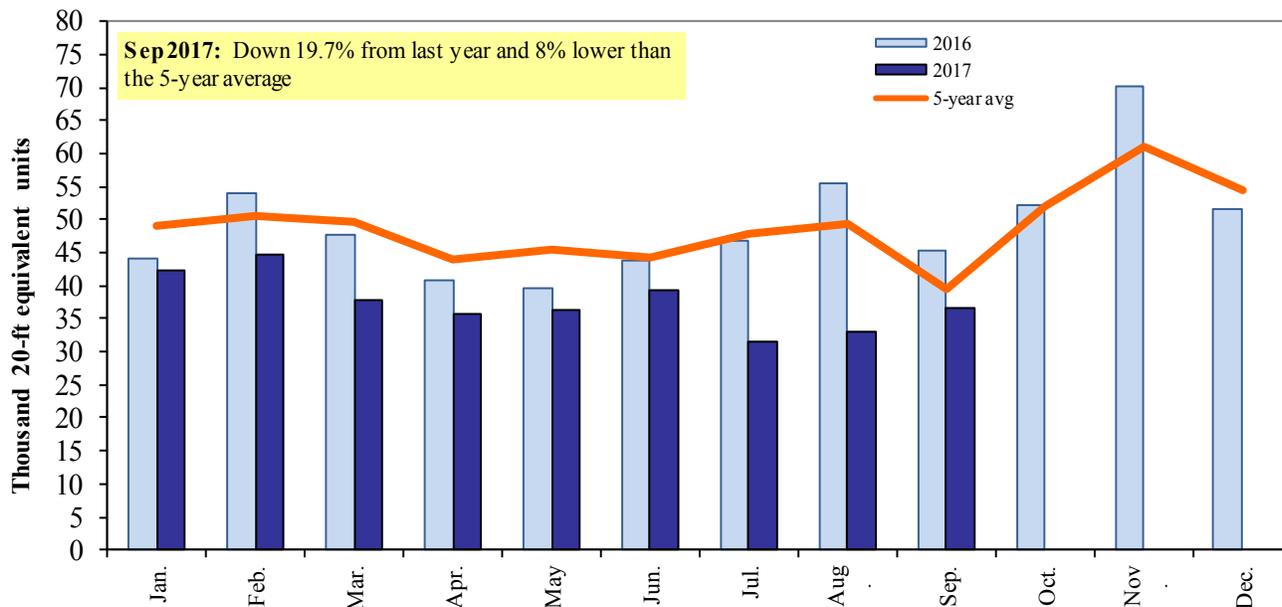


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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