



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

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April 20, 2017

WEEKLY HIGHLIGHTS

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Bulk Ocean Freight Rates Highest Since 2014

Ocean freight rates for shipping bulk grains reached the highest level since December 2014. As of April 13, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$40.25—64 percent above last year. The rate from the Pacific Northwest (PNW) to Japan was \$22.25 per mt—51 percent above last year. Since the beginning of the year, the Gulf-to-Japan rate has increased 15 percent from \$35 per mt and the PNW-to-Japan rate increased by 25 percent from \$17.75 per mt. The rates increases were driven by strong grain movements and increased demand for other bulk items such as coal, iron ore, and steel. However, according to the April 13 *Transportation and Export Report* by O'Neil Commodity Consulting, Inc., the Baltic Dry-bulk Freight Forward Agreement market remains inverted, indicating that traders are not as optimistic about rates remaining at these levels into the third and fourth quarters of 2017.

Total Grain Inspections Down but Corn and Wheat Increase

For the week ending April 13, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.5 million metric tons (mmt), down 13 percent from the previous week, but up 33 percent from the same time last year, and 21 percent above the 3-year average. Despite the decrease in total grain inspections, wheat and corn inspections increased 2 and 10 percent, respectively, from the previous week. Soybean inspections, however, dropped 52 percent from the past week due primarily to lower shipments to Asia. Grain inspections in the Pacific Northwest decreased 15 percent from the previous week, and Mississippi Gulf inspections decreased 16 percent for the same period. Outstanding export sales continued to fall for corn, wheat, and soybeans.

Container Carriers Negotiating New Contracts

April is traditionally the busy negotiation season for new contracts between ocean container carriers and beneficial cargo owners (BCOs). Cargo owners have approached this season cautiously because of the new carrier alliance structure implemented April 1 as well as the carrier merger and bankruptcy events of 2016. According to the Journal of Commerce (JOC), rates have followed normal patterns so far this year despite these uncertainties. Rates jumped briefly just before April 1 as BCOs increased cargo volumes to avoid possible delays from the new structure. Going forward, the JOC reports both carriers and BCOs are allowing for increased rates in the new contracts understanding rate levels of 2016 are unsustainable.

Snapshots by Sector

Export Sales

For the week ending April 6, **unshipped balances** of wheat, corn, and soybeans totaled 29.2 mmt, up 52 percent from the same time last year. Net weekly **wheat export sales** were .422 mmt, down 25 percent from the previous week. Net **corn export sales** were .738 mmt, down 35 percent from the previous week, and net **soybean export sales** were .402 mmt, down 3 percent from the past week.

Rail

U.S. Class I railroads originated 23,778 **grain carloads** for the week ending April 8, up 3 percent from the previous week, up 26 percent from last year, and up 14 percent from the 3-year average.

Average April shuttle **secondary railcar** bids/offers per car were \$225 below tariff for the week ending April 13, up \$94 from last week and unchanged from last year. Average non-shuttle secondary railcar bids/offers per car were \$63 below tariff, up \$63 from last week and unchanged from last year.

Barge

For the week ending April 15, **barge grain movements** totaled 695,362 tons, 2 percent lower than the last week, and up 2 percent from the same period last year.

For the week ending April 15, 443 grain barges **moved down river**, down 5 percent from last week, 649 grain barges were **unloaded in New Orleans**, down 1 percent from the previous week.

Ocean

For the week ending April 13, 51 **ocean-going grain vessels** were loaded in the Gulf, 55 percent more than the same period last year. Fifty-six vessels are expected to be loaded within the next 10 days, unchanged from the same period last year.

For the week ending April 13, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$40.25 per metric ton, 3 percent more than the previous week. The cost of shipping from the PNW to Japan was \$22.25 per metric ton, 6 percent above the previous week.

Fuel

During the week ending April 17, average **diesel fuel prices** increased 2 cents from previous week at \$2.60 per gallon, 43 cents higher than the same week last year.

Feature Article/Calendar

First Quarter Grain Inspections Reach Record High

According to USDA’s Grain Inspection, Packers and Stockyards Administration (GIPSA), during the first quarter of 2017 grain (corn, wheat, and soybeans) inspected for export from all U.S. ports reached a record 35.7 million metric tons (mmt), up 25 percent from the same quarter last year and 28 percent above the 5-year average (*see table*). First quarter corn inspections, driven by high supplies, were the second highest on record. Shipments of corn increased to Asia, Africa, and the Middle East. Total soybean inspections were down slightly from last year, but wheat inspections were the highest since 2012, due mainly to increased demand from Latin America, Asia, and Africa. The Gulf’s share of total grain exports continued to increase during the first quarter, as demand jumped for corn and wheat. The Pacific Northwest (PNW)’s share of total grain exports decreased slightly from last year (*see table*).

Gulf Inspections: First quarter grain inspections at all Gulf ports reached 21.8 mmt, up 31 percent from last year, and 34 percent above the 5-year average (*see table*). First quarter Gulf corn and soybean inspections increased significantly from last year, but wheat inspections in the Gulf were down slightly. Gulf grain inspections destined to Latin America jumped 105 percent from last year, and shipments to Asia increased 24 percent. Grain inspections destined for export to Africa from the Gulf decreased 67 percent from last year. U.S. Gulf rail deliveries of grain to port in the first quarter increased notably from last year (*see April 6, 2017 GTR, Table 3*). Barge movements of grain through the Mississippi River locks were also up significantly from last year during the first quarter.

First Quarter Total Grain Inspections By Ports, 2005-2017
(Includes Corn, Soybeans, and Wheat)

Year	U.S. Gulf	% of Average	PNW	% of Average	Atlantic & Lakes	% of Average	Interior	% of Average	U.S. Total	% of Average
1000 Metric Tons										
2005	16,165	99%	7,253	86%	436	52%	1,423	52%	25,277	89%
2006	17,693	109%	6,999	83%	419	50%	1,659	60%	26,770	95%
2007	18,246	112%	7,711	92%	538	64%	2,383	87%	28,879	102%
2008	20,115	123%	9,433	112%	663	79%	3,674	134%	33,885	120%
2009	17,519	107%	6,869	82%	512	61%	1,967	72%	26,867	95%
2010	19,298	118%	8,257	98%	711	85%	2,746	100%	31,012	110%
2011	21,714	133%	7,664	91%	761	91%	2,665	97%	32,804	116%
2012	15,692	96%	8,278	99%	475	57%	3,610	132%	28,055	99%
2013	12,492	77%	7,590	90%	884	106%	1,966	72%	22,932	81%
2014	19,626	120%	8,441	101%	984	118%	2,822	103%	31,874	113%
2015	16,976	104%	8,670	103%	910	109%	2,548	93%	29,105	103%
2016	16,700	102%	8,996	107%	925	111%	2,774	101%	29,395	104%
2017	21,836	134%	9,831	117%	695	83%	3,341	122%	35,703	126%
2012-2016 Avg.	16,297		8,395		836		2,744		28,272	

Source: USDA/GIPSA

PNW Inspections: First quarter grain inspections in the PNW totaled 9.8 mmt, up 9 percent from last year and 17 percent above the 5-year average (*see table*). First quarter rail deliveries of grain to PNW ports increased 7 percent from last year (*see April 6, 2017 GTR, Table 3*). PNW corn inspections jumped notably from last year, but soybean inspections decreased notably due to a 24 percent drop in PNW soybeans inspected for export to China. Wheat inspections increased moderately from last year.

Atlantic and Great Lakes Inspections: Atlantic and Great Lakes first quarter grain inspections decreased 24 percent from last year, to .695 mmt. Inspections of grain in the Atlantic and Great Lakes were 17 percent below the 5-year average. Corn, soybean, and wheat inspections were down in the Atlantic and Great Lakes, as shipments dropped primarily to Asia.

Interior Inspections: First quarter Interior grain inspections reached 3.3 mmt, up 21 percent from last year and 22 percent above the 5-year average. Inspections of corn in the Interior increased 18 percent from last year, due primarily to increased shipments to Mexico. Interior soybean inspections increased 15 percent from last year, due mainly to a 29 percent jump in shipments to Asia. Wheat inspections increased notably from last year, as shipments to Mexico more than doubled.

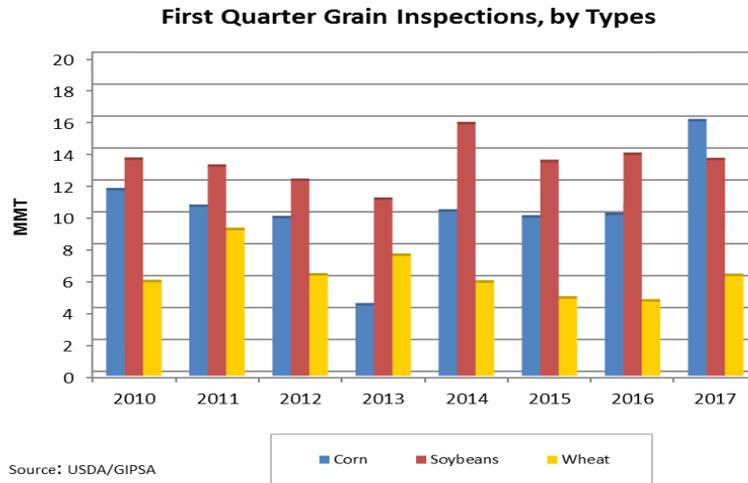
Corn and Soybean Inspections: First quarter corn inspections, the second highest on record since 1995, reached 15.9 mmt, up 58 percent from last year, and 79 percent above the 5-year average (see figure). First quarter corn inspections also surpassed soybean inspections for the first time since 2008. Gulf corn inspections during the first quarter increased 58 percent from last year in the Gulf, and increased 110 percent in the PNW as demand from Asia increased. U.S. corn supplies are up due to the large crop last year.

First quarter soybean inspections totaled 13.5 mmt, down 2 percent from last year and 2 percent above the 5-year average (see figure).

Total U.S. soybeans inspected for export to China decreased 7 percent from last year, accounting for 56 percent of total soybeans inspected. Gulf soybean inspections (8.6 mmt) increased 2 percent from last year and increased 9 percent above the 5-year average. PNW soybean inspections (3.1 mmt) decreased 29 percent from last year, and were 14 percent below the 5-year average.

Wheat Inspections: Wheat inspections in the first quarter reached 6.3 mmt, up 34 percent from last year, and 7 percent above the 5-year average (see figure). Wheat inspections were also the highest since 2013. U.S. wheat inspections increased primarily due to higher supplies, and increasing demand from major importers. Shipments of wheat increased significantly to Asia, Latin America, and Africa.

Market Outlook: In its April *World Agricultural Supply and Demand Estimates* forecast, USDA projects corn exports for the 2016/17 marketing year to increase 18 percent from last year, unchanged from the March estimate. Wheat exports are projected to increase 33 percent from last year (also unchanged from last month's estimate). The April forecast for 2016/17 soybean exports is up 5 percent from last year. Soybean and wheat export sales reports are in line with projections, indicating strong demand. Cumulative (shipped) marketing year-to-date export sales are above last year for soybeans, corn, and wheat (see *GTR Table 12*). Johnny.Hill@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
04/19/17	174	257	201		136	180	158
04/12/17	173	254	197		135	174	149

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)

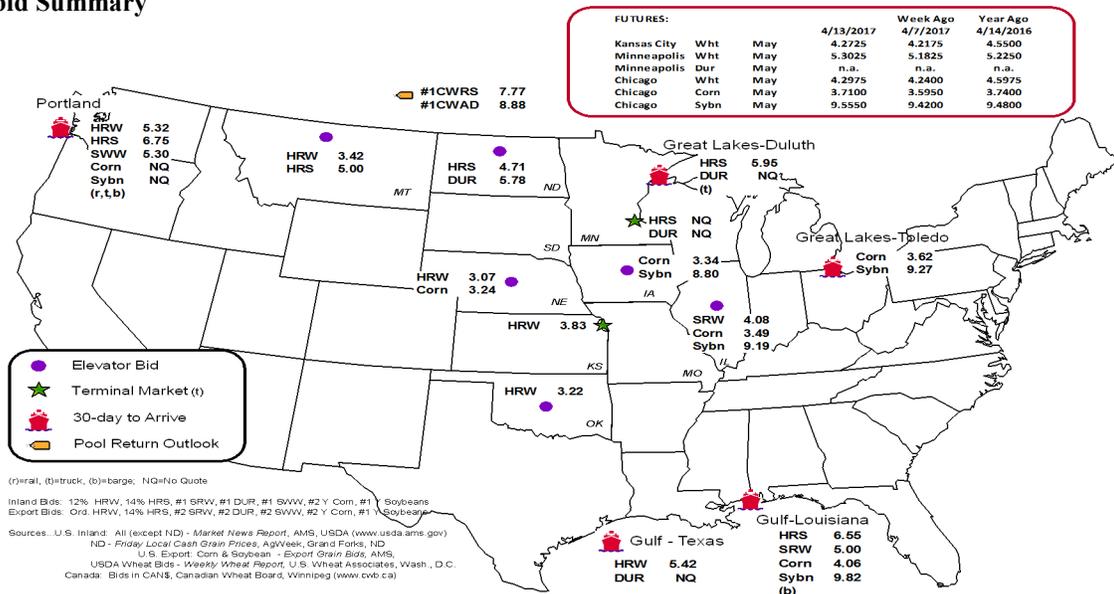
Commodity	Origin--Destination	4/14/2017	4/7/2017
Corn	IL--Gulf	-0.57	-0.58
Corn	NE--Gulf	-0.82	-0.81
Soybean	IA--Gulf	-1.02	-1.03
HRW	KS--Gulf	-1.59	-1.60
HRS	ND--Portland	-2.04	-2.11

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			
04/12/2017 ^p	1	1,777	6,027	243	8,048	4/8/2017	2,095
04/05/2017 ^r	402	1,784	6,666	474	9,326	4/1/2017	2,307
2017 YTD ^r	12,087	29,361	93,904	9,192	144,544	2017 YTD	30,689
2016 YTD ^r	5,255	22,989	84,821	8,169	121,234	2016 YTD	28,692
2017 YTD as % of 2016 YTD	230	128	111	113	119	% change YTD	107
Last 4 weeks as % of 2016 ²	1,455	130	126	134	137	Last 4wks % 2016	97
Last 4 weeks as % of 4-year avg. ²	194	118	127	106	127	Last 4wks % 4 yr	120
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2016 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.

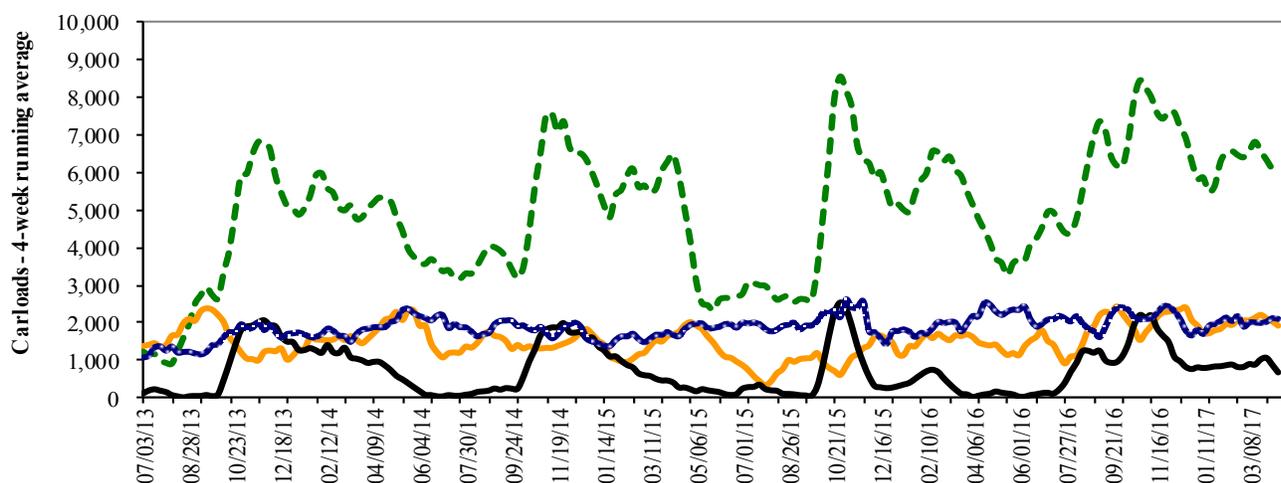
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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 4/12--up 26 from same period last year; up 27% from 4-year average
--- Texas Gulf: 4 wks. ending 4/12--up 30% from same period last year; up 18% from 4-year average
--- Miss. River: 4 wks. ending 4/12--up 135% from same period last year; up 94% from 4-year average
--- Cross-border: 4 wks. ending 4/8--down 3% from same period last year; up 20% from 4-year average

Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

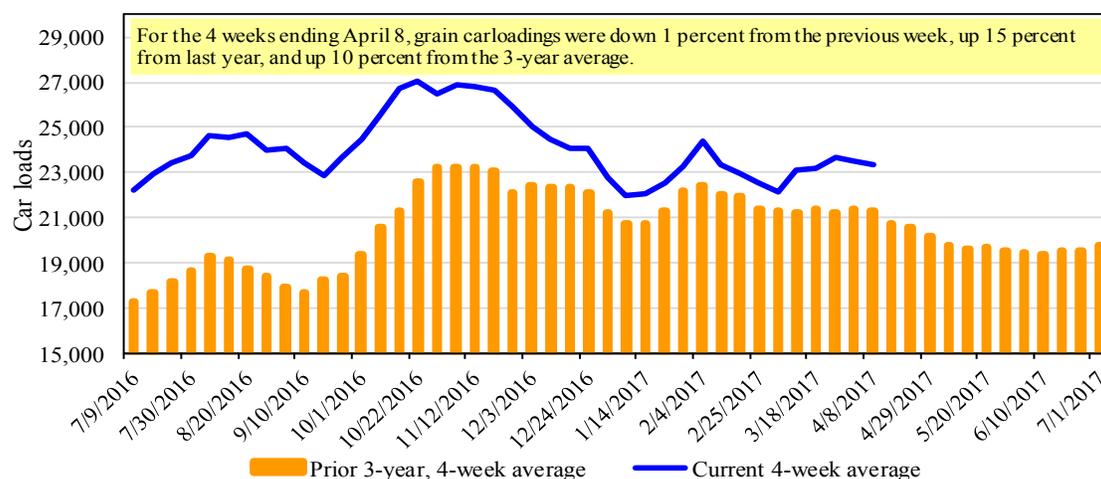
For the week ending: 4/8/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,062	2,879	11,591	887	6,359	23,778	4,558	4,526
This week last year	1,659	2,494	8,772	973	4,977	18,875	3,096	4,887
2017 YTD	26,923	39,671	157,650	13,741	87,268	325,253	55,631	59,269
2016 YTD	26,792	39,003	151,373	12,015	73,365	302,548	48,014	61,449
2017 YTD as % of 2016 YTD	100	102	104	114	119	108	116	96
Last 4 weeks as % of 2016*	104	109	113	112	128	115	124	95
Last 4 weeks as % of 3-yr avg.**	90	98	113	101	120	110	108	96
Total 2016	95,179	151,006	590,779	45,246	300,836	1,183,046	193,971	234,738

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

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

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

Figure 3

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

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

For the week ending: 4/6/2017		Delivery period							
		Apr-17	Apr-16	May-17	May-16	Jun-17	Jun-16	Jul-17	Jul-16
BNSF ³	COT grain units	no bids	no bids	no bids	no bids	no bids	0	no bids	0
	COT grain single-car ⁵	11	0	0	0	no bids	no bids	no bids	no bids
UP ⁴	GCAS/Region 1	no offer	no bids	n/a	n/a				
	GCAS/Region 2	no offer	no bids	n/a	n/a				

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

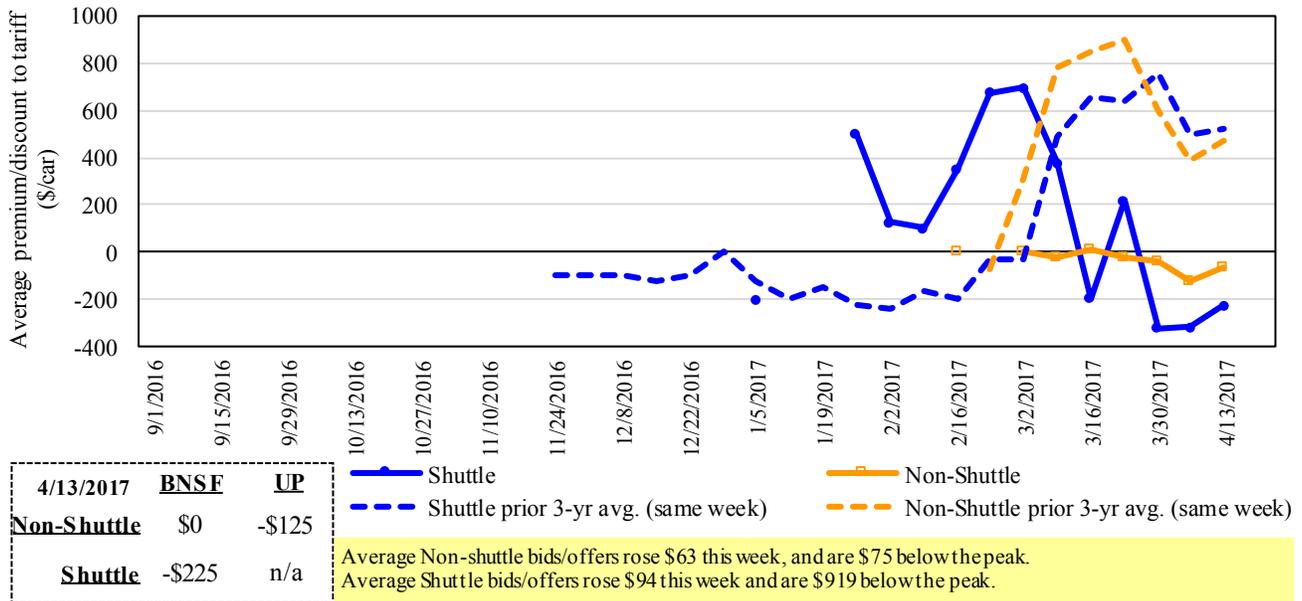
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

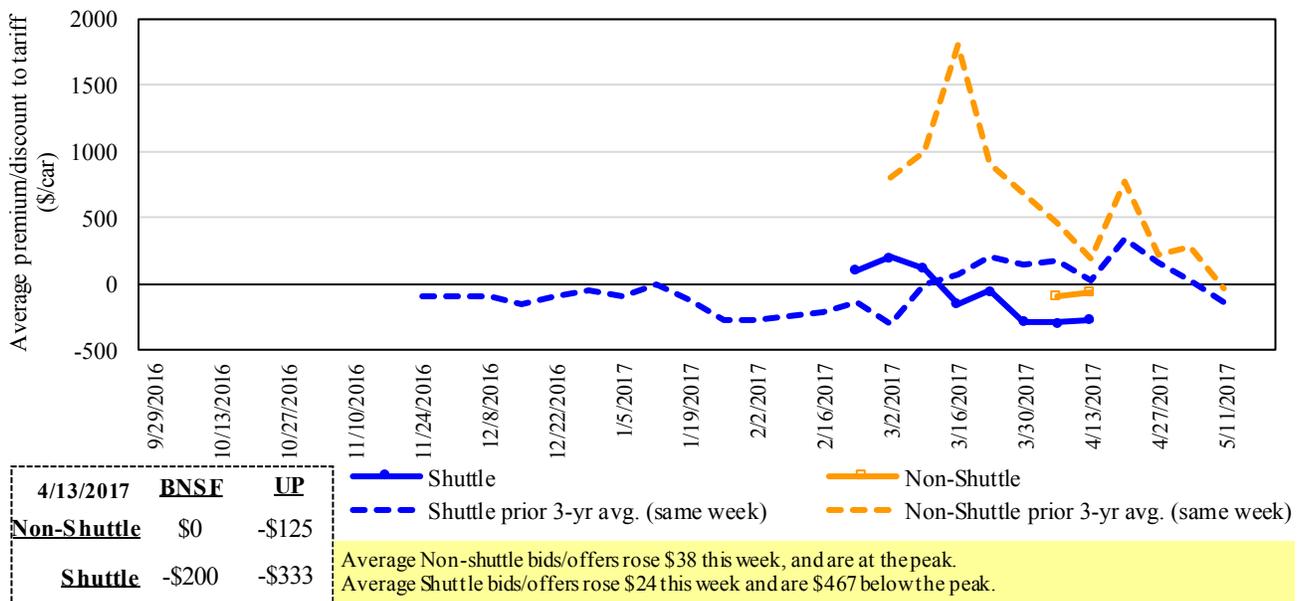
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



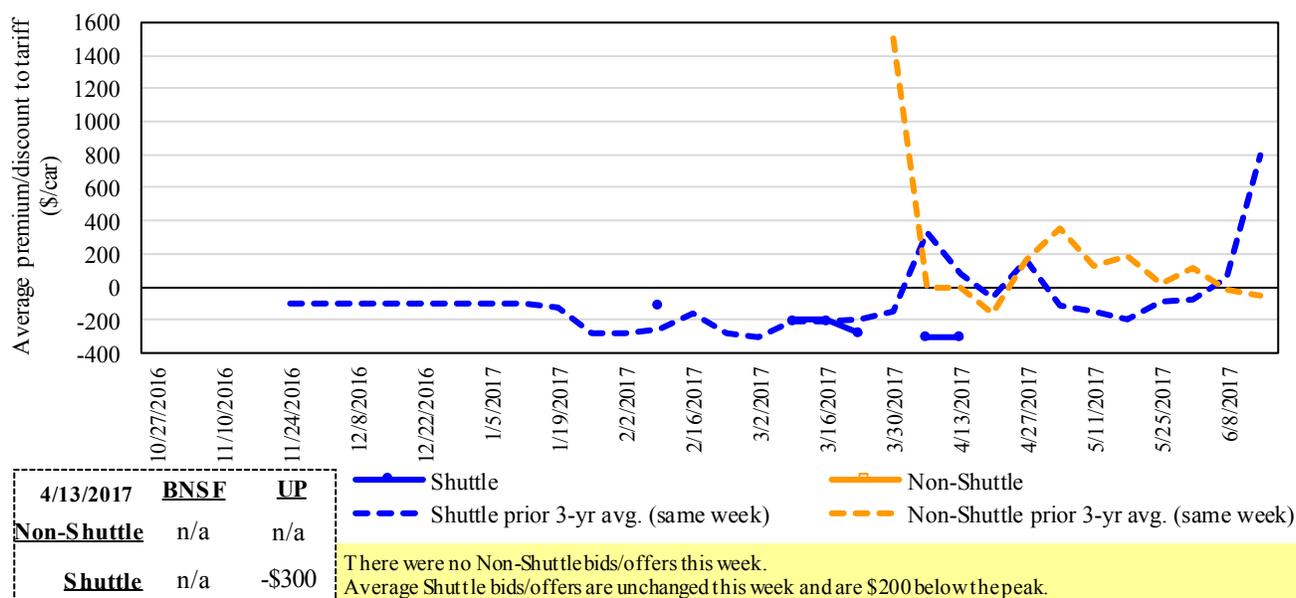
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in May 2017, 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 June 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					
		Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17
4/13/2017							
Non-shuttle	BNSF-GF	0	0	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 2016	25	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(125)	(125)	n/a	n/a	n/a	n/a
	Change from last week	0	(25)	n/a	n/a	n/a	n/a
	Change from same week 2016	(25)	(25)	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(225)	(200)	n/a	n/a	n/a	n/a
	Change from last week	13	31	n/a	n/a	n/a	n/a
	Change from same week 2016	(25)	(6)	n/a	n/a	n/a	n/a
	UP-Pool	n/a	(333)	(300)	(175)	n/a	n/a
	Change from last week	n/a	17	0	0	n/a	n/a
	Change from same week 2016	n/a	(138)	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

April, 2017	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,770	\$51	\$37.94	\$1.03	6
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$6	\$41.20	\$1.12	21
	Wichita, KS	Los Angeles, CA	\$6,950	\$31	\$69.32	\$1.89	3
	Wichita, KS	New Orleans, LA	\$4,408	\$89	\$44.66	\$1.22	6
	Sioux Falls, SD	Galveston-Houston, TX	\$6,686	\$25	\$66.64	\$1.81	6
	Northwest KS	Galveston-Houston, TX	\$4,676	\$98	\$47.40	\$1.29	6
	Amarillo, TX	Los Angeles, CA	\$4,875	\$136	\$49.76	\$1.35	6
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$101	\$37.55	\$0.95	3
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0
	Des Moines, IA	Davenport, IA	\$2,258	\$21	\$22.63	\$0.57	5
	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	\$63	\$35.72	\$0.91	4
	Des Moines, IA	Los Angeles, CA	\$5,202	\$182	\$53.47	\$1.36	7
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,634	\$67	\$36.75	\$1.00	-3
	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	\$101	\$45.64	\$1.24	5	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$18	\$39.43	\$1.07	6
	Wichita, KS	Galveston-Houston, TX	\$4,071	\$14	\$40.56	\$1.10	8
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0
	Grand Forks, ND	Portland, OR	\$5,611	\$30	\$56.02	\$1.52	6
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$32	\$59.21	\$1.61	6
	Northwest KS	Portland, OR	\$5,643	\$160	\$57.63	\$1.57	6
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$37	\$50.02	\$1.27	5
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$34	\$49.59	\$1.26	5
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$101	\$35.57	\$0.90	3
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$20	\$36.94	\$0.94	7
	Des Moines, IA	Amarillo, TX	\$3,895	\$79	\$39.46	\$1.00	5
	Minneapolis, MN	Tacoma, WA	\$5,000	\$37	\$50.02	\$1.27	5
	Council Bluffs, IA	Stockton, CA	\$4,740	\$38	\$47.45	\$1.21	8
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$34	\$55.95	\$1.52	7
	Minneapolis, MN	Portland, OR	\$5,650	\$37	\$56.47	\$1.54	8
	Fargo, ND	Tacoma, WA	\$5,500	\$30	\$54.92	\$1.49	6
	Council Bluffs, IA	New Orleans, LA	\$4,525	\$116	\$46.09	\$1.25	5
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0
Grand Island, NE	Portland, OR	\$5,460	\$164	\$55.85	\$1.52	5	

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: April, 2017							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,638	\$70	\$68.54	\$1.86	3
	KS	Guadalajara, JA	\$7,180	\$268	\$76.10	\$2.07	5
	TX	Salinas Victoria, NL	\$4,258	\$42	\$43.93	\$1.19	4
Corn	IA	Guadalajara, JA	\$8,187	\$220	\$85.90	\$2.18	0
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	-3
	NE	Queretaro, QA	\$7,909	\$138	\$82.23	\$2.09	2
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$135	\$75.64	\$1.92	2
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	-1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$232	\$90.72	\$2.47	2
	NE	Guadalajara, JA	\$8,942	\$235	\$93.77	\$2.55	0
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5
	KS	Torreon, CU	\$7,489	\$157	\$78.12	\$2.12	2
Sorghum	NE	Celaya, GJ	\$7,164	\$197	\$75.21	\$1.91	0
	KS	Queretaro, QA	\$7,608	\$87	\$78.62	\$2.00	2
	NE	Salinas Victoria, NL	\$6,213	\$70	\$64.19	\$1.63	2
	NE	Torreon, CU	\$6,607	\$144	\$68.98	\$1.75	1

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

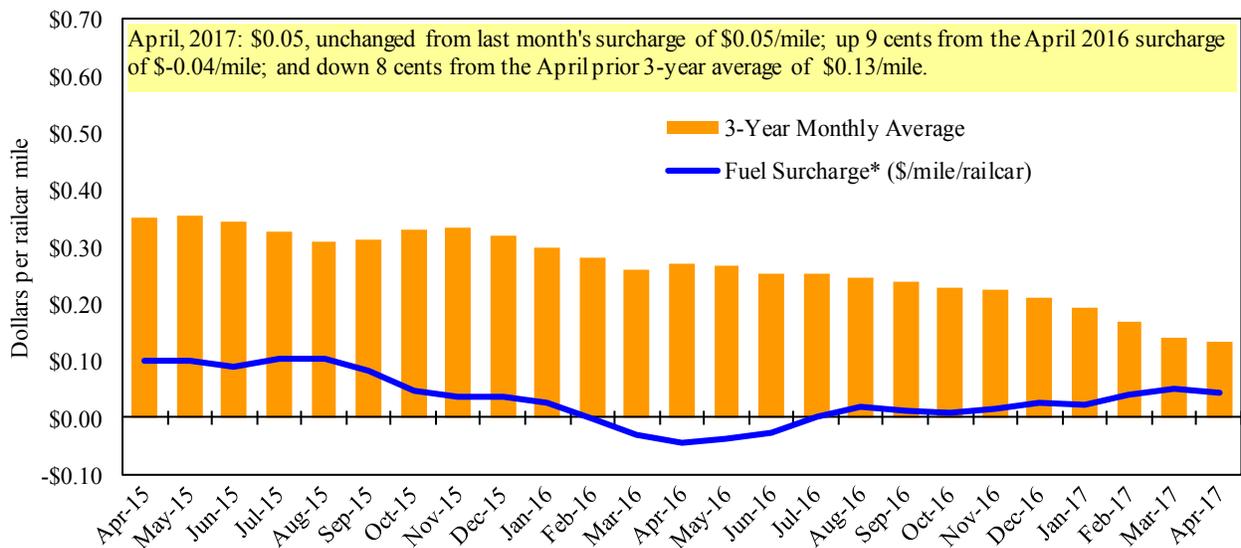
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

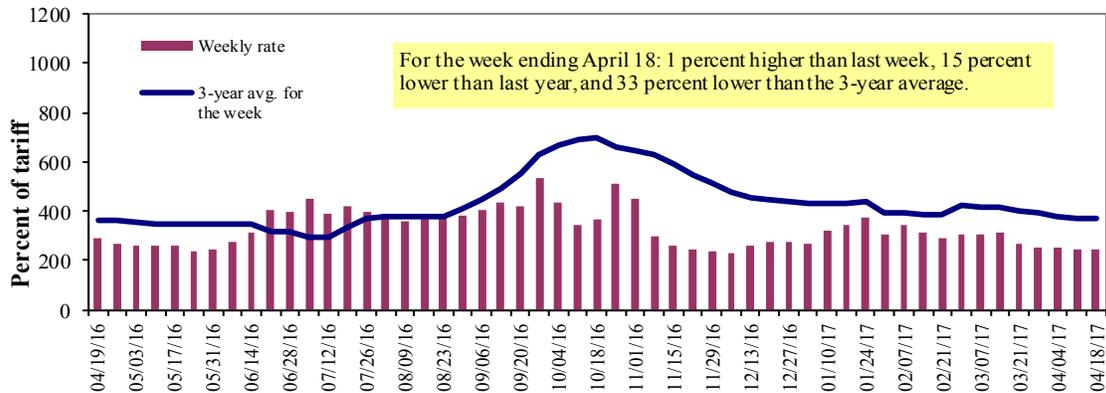
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	4/18/2017	293	245	245	175	173	173	160
	4/11/2017	298	243	243	175	178	178	160
\$/ton	4/18/2017	18.14	13.03	11.37	6.98	8.11	6.99	5.02
	4/11/2017	18.45	12.93	11.28	6.98	8.35	7.19	5.02
Current week % change from the same week:								
	Last year	-16	-18	-15	-22	-19	-19	-16
	3-year avg. ²	-30	-35	-33	-36	-40	-40	-33
Rate¹	May	295	245	245	173	173	173	160
	July	313	263	258	195	195	195	178

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

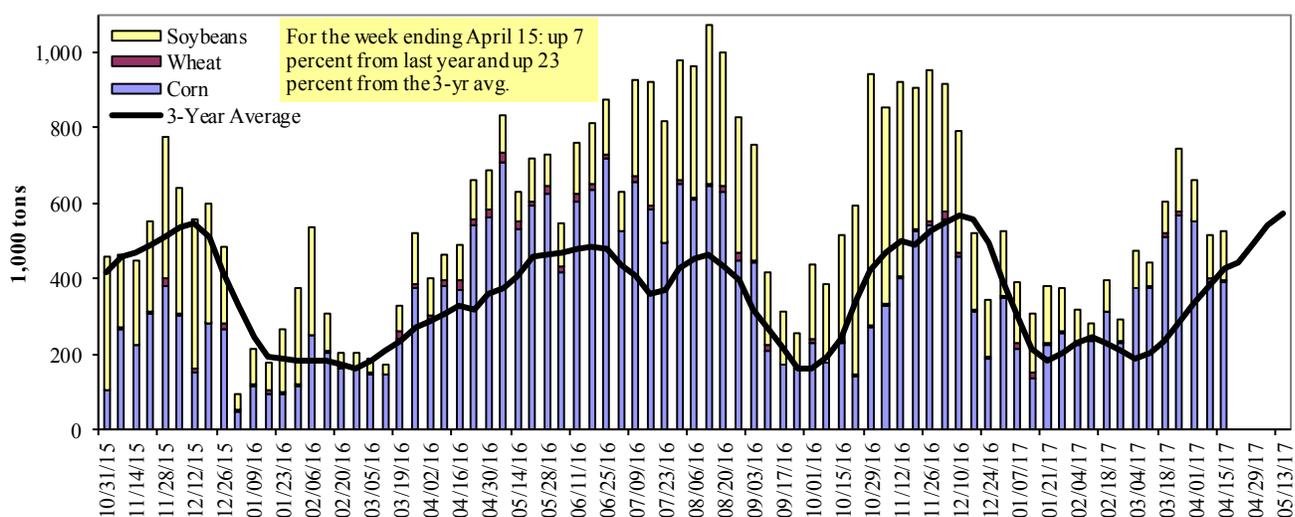
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton})/100$$

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 4/15/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	301	14	92	0	407
Winfield, MO (L25)	354	2	109	0	465
Alton, IL (L26)	406	2	123	0	530
Granite City, IL (L27)	392	3	129	0	523
Illinois River (L8)	33	0	13	0	46
Ohio River (L52)	55	20	44	0	119
Arkansas River (L1)	0	42	11	0	53
Weekly total - 2017	447	65	184	0	695
Weekly total - 2016	481	40	161	0	681
2017 YTD ¹	6,739	619	3,878	130	11,366
2016 YTD	5,173	434	3,462	47	9,116
2017 as % of 2016 YTD	130	143	112	277	125
Last 4 weeks as % of 2016 ²	118	126	126	109	120
Total 2016	24,136	2,030	16,668	344	43,178

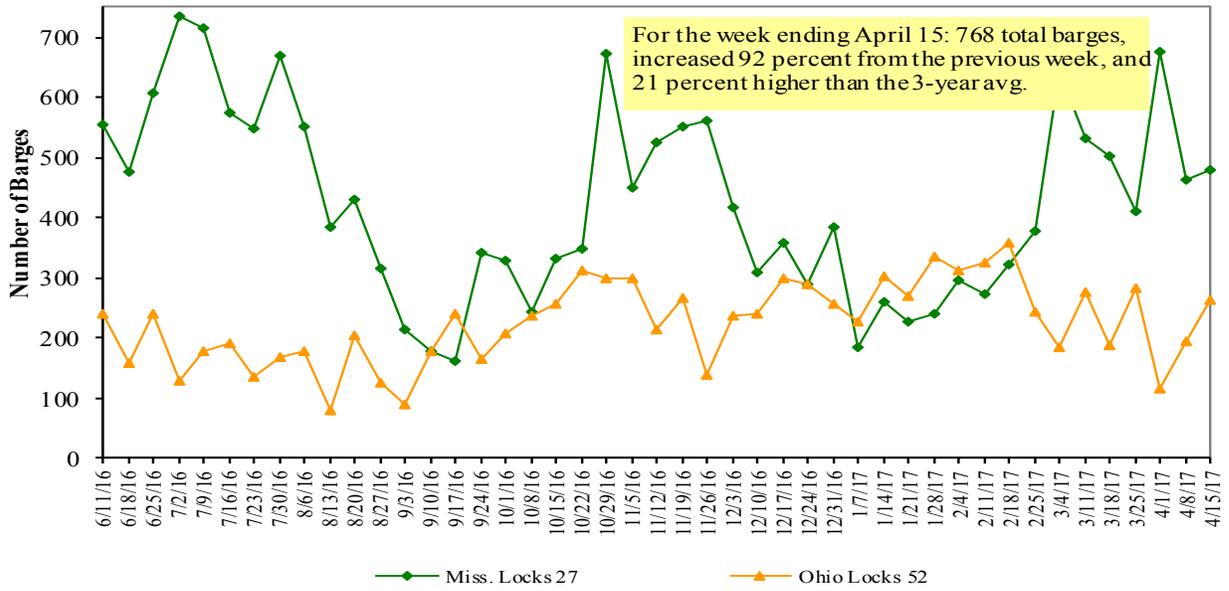
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

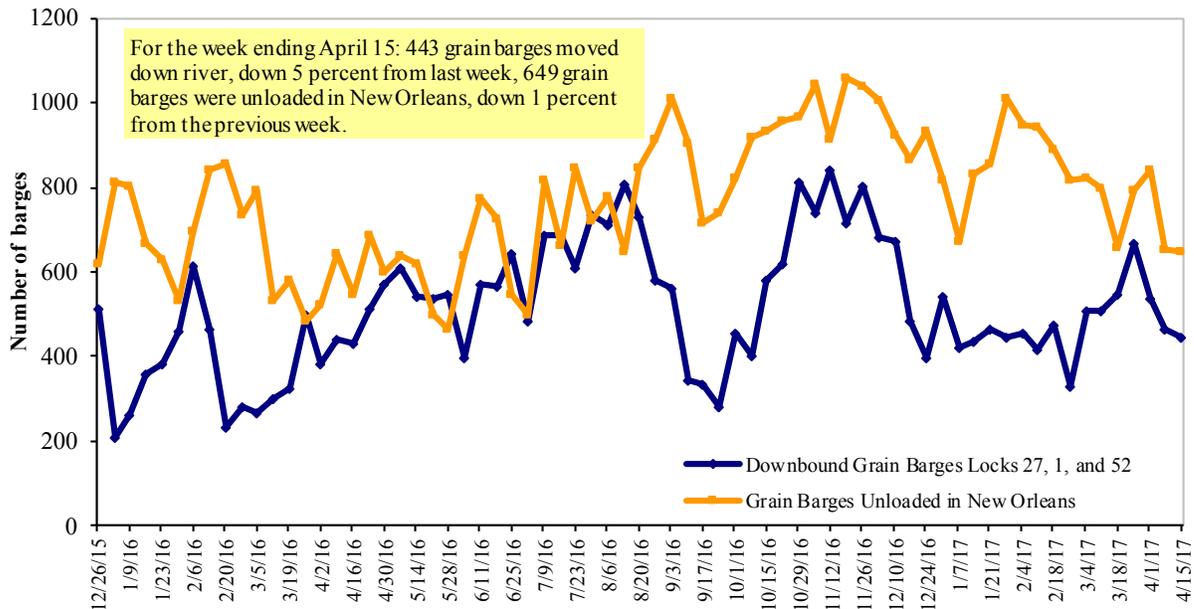
Source: U.S. Army Corps of Engineers

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



Source: U.S. Army Corps of Engineers

Figure 12
Grain Barges for Export in New Orleans Region



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

Truck Transportation

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

Table 11

Retail on-Highway Diesel Prices¹, Week Ending 4/17/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.631	0.011	0.411
	New England	2.638	-0.001	0.351
	Central Atlantic	2.783	0.022	0.458
	Lower Atlantic	2.522	0.006	0.396
II	Midwest ²	2.536	0.021	0.424
III	Gulf Coast ³	2.458	0.012	0.412
IV	Rocky Mountain	2.652	0.012	0.481
V	West Coast	2.877	0.015	0.506
	West Coast less California	2.791	0.019	0.540
	California	2.946	0.011	0.480
Total	U.S.	2.597	0.015	0.432

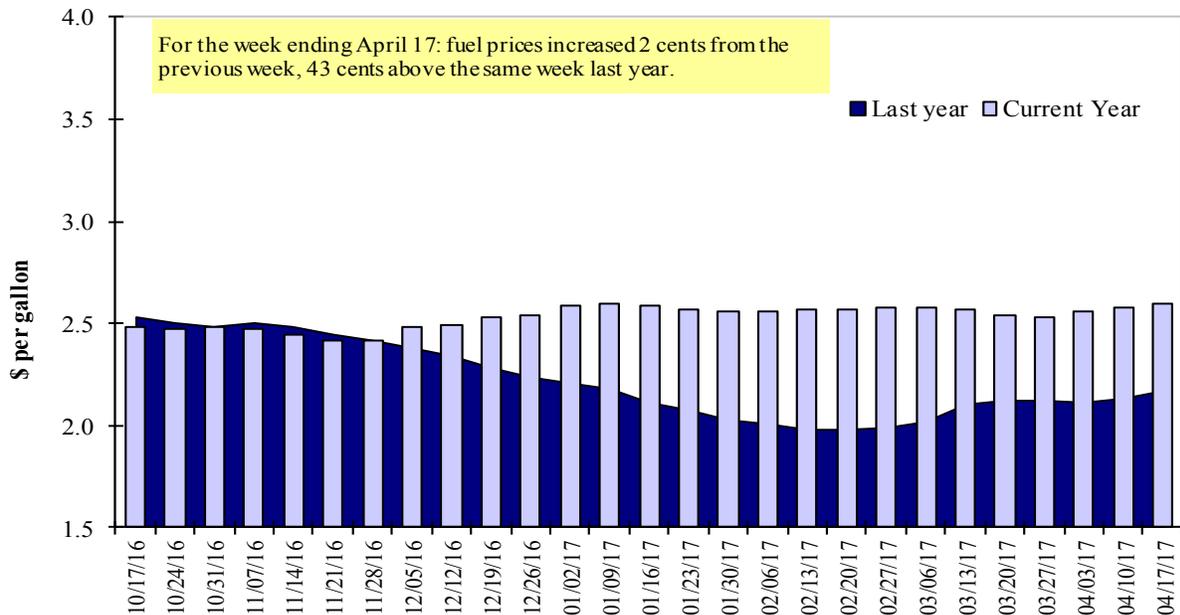
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
4/6/2017	1,971	492	1,818	1,348	130	5,760	16,096	7,350	29,205
This week year ago	717	369	1,166	655	112	3,018	12,743	3,410	19,171
Cumulative exports-marketing year²									
2016/17 YTD	9,288	1,917	6,569	3,329	377	21,479	33,204	48,140	102,823
2015/16 YTD	4,713	2,754	5,246	3,004	585	16,302	20,981	41,301	78,584
YTD 2016/17 as % of 2015/16	197	70	125	111	64	132	158	117	131
Last 4 wks as % of same period 2015/16	285	139	165	206	88	196	131	230	195
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 4/06/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	12,070	10,964	10	11,204
Japan	9,384	6,450	45	11,284
Korea	4,845	1,280	279	3,931
Colombia	3,826	3,861	(1)	4,134
Peru	2,438	1,481	65	2,109
Top 5 Importers	32,563	24,037	35	32,662
Total US corn export sales	49,300	33,724	46	46,633
% of Projected	87%	70%		
Change from prior week ²	738	1,136		
Top 5 importers' share of U.S. corn export sales	66%	71%		70%
USDA forecast, April 2017	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, April 2017	138,430	132,690	4	

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - 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 4/06/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	35,376	26,847	32	29,033
Mexico	3,320	2,960	12	3,295
Indonesia	1,707	1,378	24	2,065
Japan	1,817	1,886	(4)	1,994
Netherlands	1,323	1,353	(2)	1,644
Top 5 importers	43,544	34,424	26	38,032
Total US soybean export sales	55,490	44,711	24	48,389
% of Projected	101%	85%		
Change from prior week ²	402	382		
Top 5 importers' share of U.S. soybean export sales	78%	77%		79%
USDA forecast, April 2017	55,177	52,752	5	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - 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/esquery/>. 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. (Carry over plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 4/06/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2013-2015
	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,607	2,322	12	2,743
Mexico	3,081	2,214	39	2,660
Philippines	2,538	2,089	22	2,156
Brazil	1,184	427	177	2,076
Nigeria	1,501	1,429	5	1,978
Korea	1,281	1,131	13	1,170
China	1,346	714	89	1,770
Taiwan	1,040	990	5	1,005
Indonesia	1,004	459	119	776
Colombia	789	613	29	679
Top 10 importers	16,370	12,386	32	17,013
Total US wheat export sales	27,239	19,320	41	24,485
% of Projected	98%	91%		
Change from prior week ²	422	123		
Top 10 importers' share of U.S. wheat export sales	60%	64%		69%
USDA forecast, April 2017	27,929	21,117	32	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2015/16 - 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/esquery/>. Total commitments change (net sales) from prior week could include revisions from the previous 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 04/13/17	Previous Week ¹	Current Week as % of Previous	2017 YTD	2016 YTD	2017 YTD as % of 2016 YTD	Last 4-weeks as % of:		2016 Total
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	334	366	91	3,971	3,401	117	131	128	12,325
Corn	363	328	111	4,259	2,328	183	128	133	12,009
Soybeans	70	208	34	3,535	4,390	81	184	92	14,447
Total	768	902	85	11,764	10,119	116	136	122	38,782
Mississippi Gulf									
Wheat	202	101	199	1,449	999	145	196	116	3,480
Corn	717	672	107	11,560	7,729	150	134	124	31,420
Soybeans	207	563	37	9,488	8,598	110	179	167	35,278
Total	1,127	1,336	84	22,497	17,325	130	149	133	70,178
Texas Gulf									
Wheat	152	177	86	1,979	827	239	338	174	6,019
Corn	0	18	0	286	251	114	121	196	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
Total	152	195	78	2,265	1,170	194	288	176	8,792
Interior									
Wheat	18	30	63	530	384	138	117	107	1,543
Corn	217	165	132	2,047	1,780	115	116	131	7,197
Soybeans	101	128	79	1,501	1,211	124	128	137	4,577
Total	337	322	105	4,079	3,375	121	120	130	13,317
Great Lakes									
Wheat	0	19	0	27	11	258	185	177	1,186
Corn	0	0	n/a	0	0	n/a	n/a	0	584
Soybeans	0	26	0	26	0	n/a	n/a	1400	910
Total	0	46	0	53	11	508	435	218	2,681
Atlantic									
Wheat	0	0	n/a	37	126	29	3	2	315
Corn	0	0	n/a	5	14	38	114	14	294
Soybeans	74	11	651	767	805	95	140	163	2,269
Total	75	12	628	809	944	86	113	92	2,878
U.S. total from ports²									
Wheat	707	694	102	7,993	5,747	139	166	131	24,867
Corn	1,298	1,183	110	18,157	12,101	150	130	127	53,173
Soybeans	453	936	48	15,317	15,096	101	168	140	58,587
Total	2,458	2,813	87	41,467	32,944	126	146	131	136,627

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

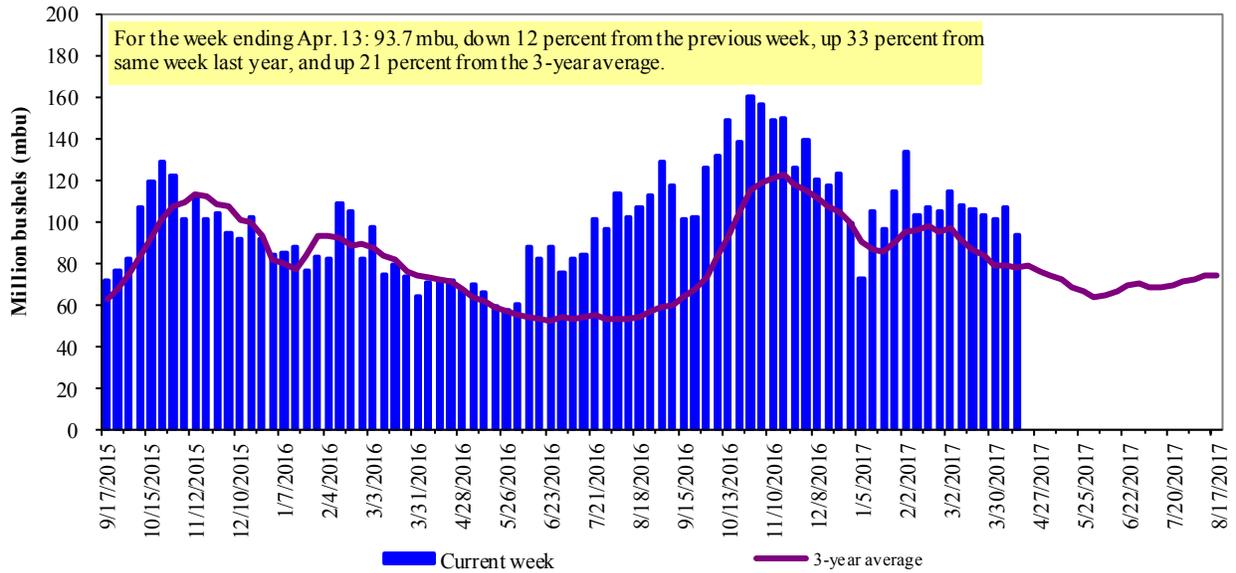
Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

² Total only includes regions shown above.

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

Figure 14

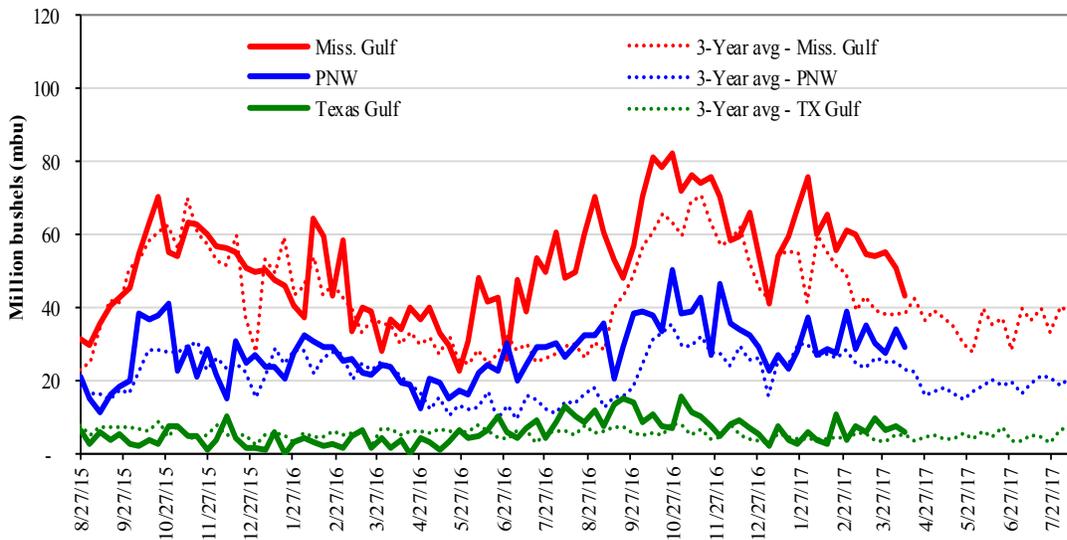
U.S. grain inspected for export (wheat, corn, and soybeans)



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

Figure 15

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



Week ending 04/13/17 inspections (mbu):		Percent change from:				
Mississippi Gulf:	43.3	Last Week:	down 15	down 22	down 16	down 14
PNW:	29.2	Last Year (same week):	up 27	up 66	up 30	up 50
Texas Gulf:	5.6	3-yr avg. (4-wk. mov. Avg):	up 13	up 37	up 15	up 18

Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)
¹The 3-year average is based on a 4-week running average

Ocean Transportation

Table 17

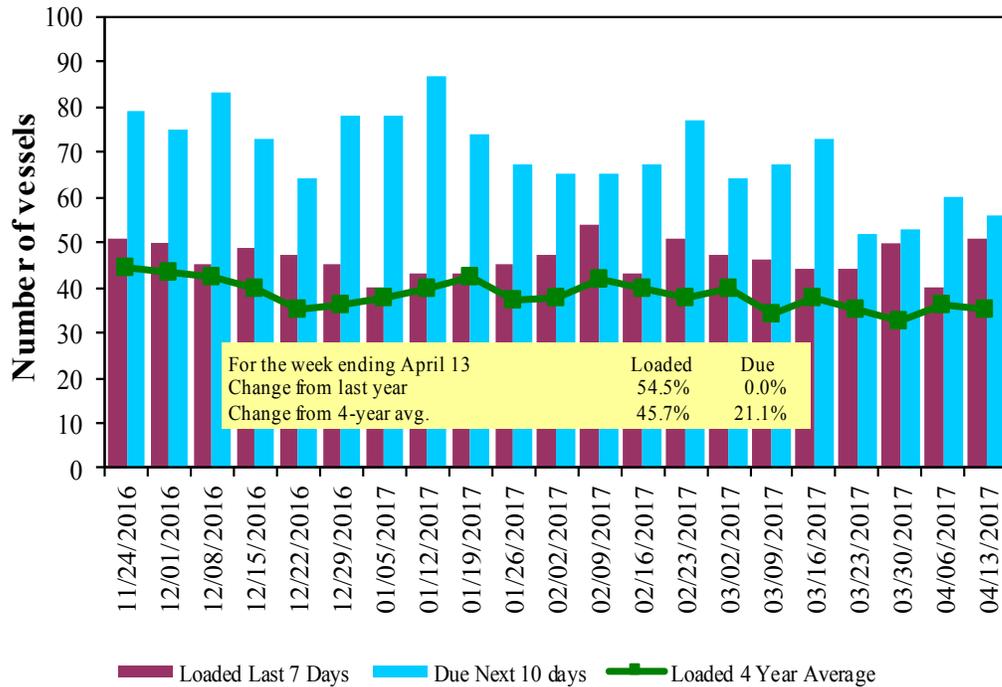
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
4/13/2017	38	51	56	20	n/a
4/6/2017	53	40	60	20	n/a
2016 range	(21..62)	(27..55)	(40..87)	(6..27)	n/a
2016 avg.	43	40	62	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

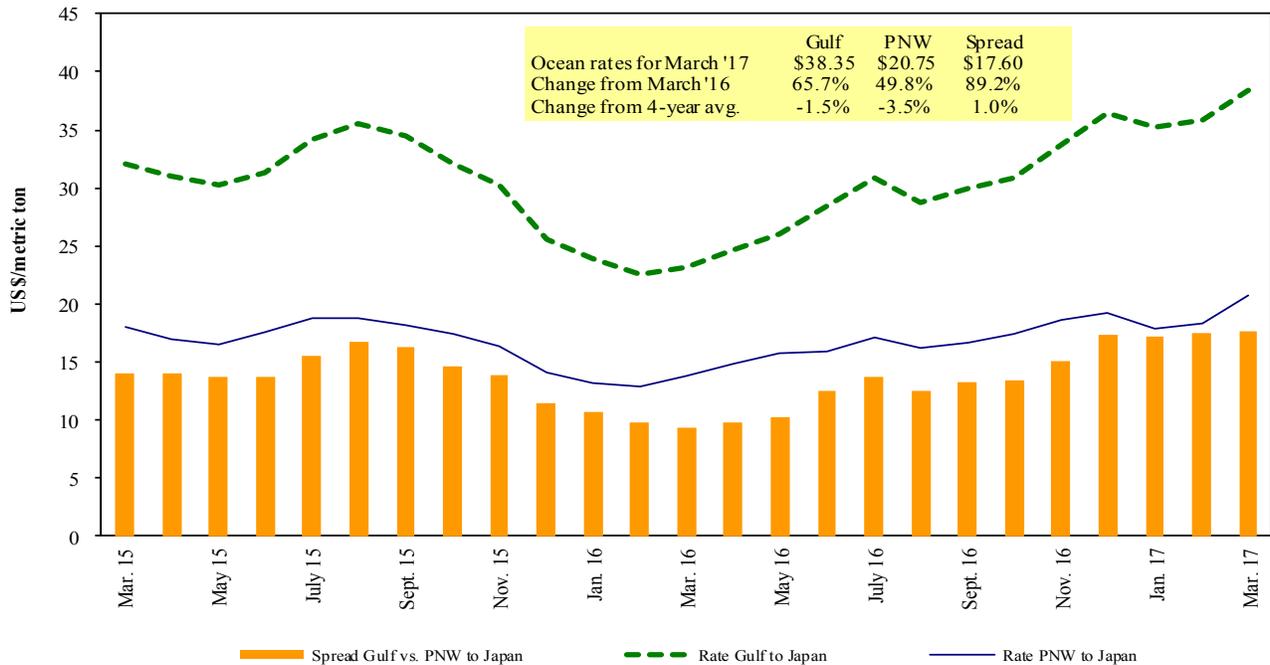
U.S. Gulf Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 04/08/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Cote d'Ivoire	Rice	Jun 19/29	6,000	93.33*
PNW	Taiwan	Wheat	Jun 9/23	48,425	29.70
PNW	Taiwan	Wheat	May 6/20	52,500	28.48
PNW	Taiwan	Wheat	Apr 19/May 3	50,350	29.12
Brazil	China	Heavy Grain	Apr 11/17	60,000	29.75
Brazil	China	Heavy Grain	Apr 10/15	60,000	31.00
Brazil	China	Heavy Grain	Mar 7/14	66,000	28.50
Brazil	China	Heavy Grain	May 1/5	60,000	23.50
Brazil	China	Heavy Grain	Mar 5/14	65,000	23.90 op 24.40
Brazil	South Korea	Heavy Grain	Mar 15/Apr 15	65,000	23.50
EC S. America	China	Heavy Grain	May 20/30	60,000	29.75
EC S. America	China	Heavy Grain	Mar 1/10	60,000	25.25
EC S. America	China	Heavy Grain	Feb 1/10	60,000	24.00
U.S. Gulf	Djibouti	Wheat	Mar 17/27	8,870	67.75*
U.S. Gulf	Berbera	Sorghum	Mar 17/27	34,860	47.75*
Bahia Blanca	Saudi Arabia	Barley	Mar 20/30	60,000	31.75
Brazil	China	Heavy Grain	Mar 21/30	60,000	26.30
Kavkaz	Tunisia	Wheat	Apr 3/10	25,000	16.75
Santos	Qingdao	Heavy Grain	Apr 1/15	60,000	29.50
Santos	China	Heavy Grain	Apr 10/15	60,000	28.00
U.S. Gulf	Conakry	Milled Rice	Apr 15/25	10,400	75.00*
U.S. Gulf	Northern China	Heavy Grain	Mar 15/20	53,000	39.00
Hamburg	Turkey	Wheat	Mar 5/10	60,000	12.50

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

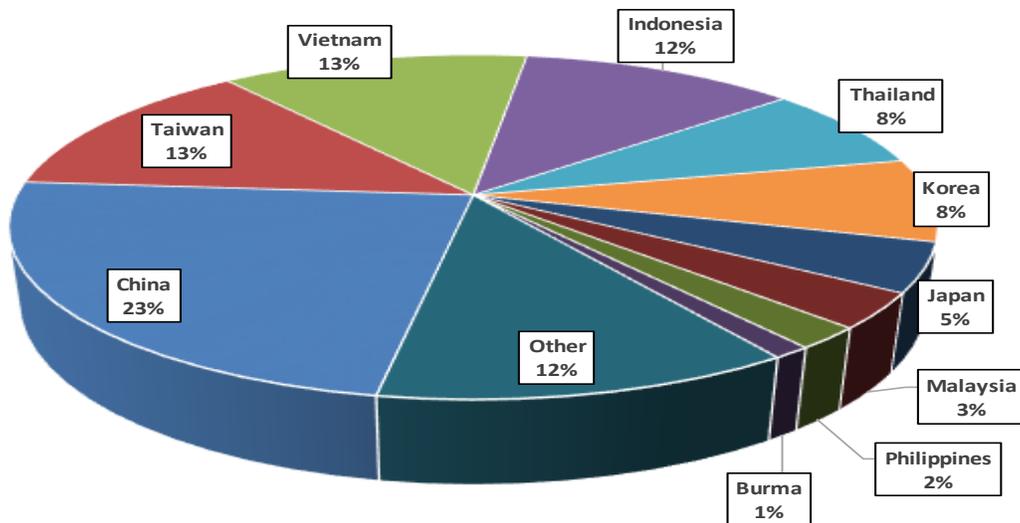
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

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

Figure 18

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

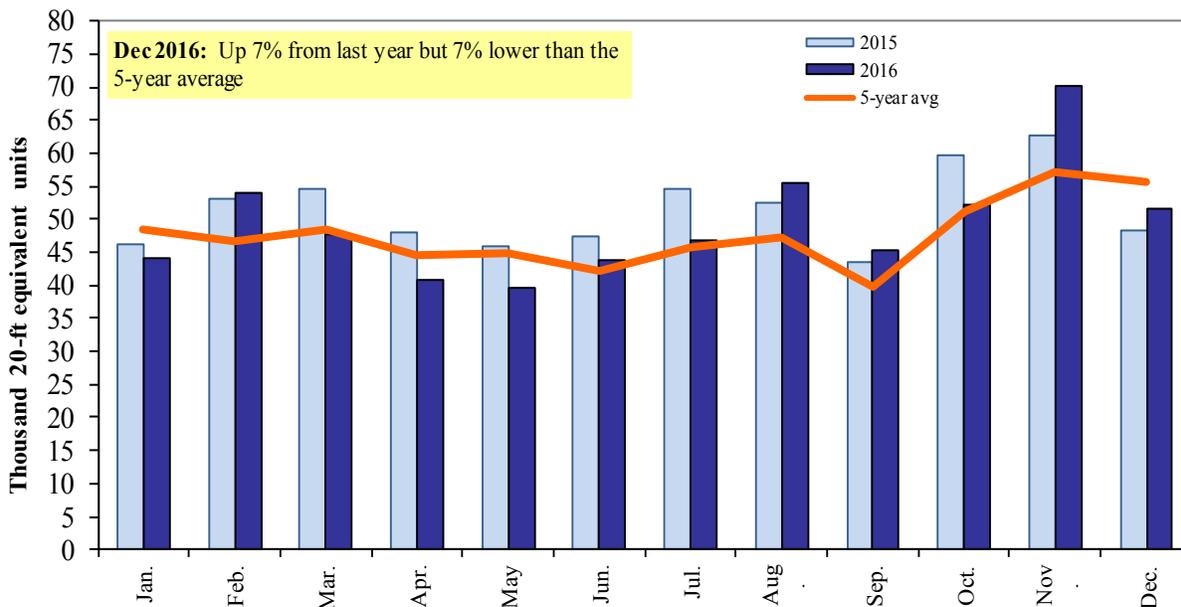


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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