



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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May 10, 2018

WEEKLY HIGHLIGHTS

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CGB and Riverland Ag Announce Joint Grain Terminal in Savage, MN

On May 1, Consolidated Grain and Barge Co. (CGB) and Riverland Ag announced their joint ownership and operation of a grain terminal in Savage, MN. The terminal will receive, store, and ship wheat, corn, soybeans, rye and other products. The facility has 9.2 million bushels of grain storage, barge and rail shipping capabilities, high speed truck and rail receiving capacity, and connections with the Twin Cities and Western Railroad, BNSF Railway, Union Pacific Railroad, and Canadian Pacific Railway. The announcement says the new venture will allow for expansion into new grain markets and maximize volume from each company to lower cost per unit handled.

Corn Inspections Rebound; Total Inspections Well Above Average

For the week ending May 3, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.8 million metric tons (mmt); up 10 percent from the previous week, up 47 percent from last year, and 39 percent above the 3-year average. The increase in grain inspections was helped by a 29 percent jump in inspections of corn, with shipments to Asia increasing 48 percent from the past week. Inspections of wheat and soybeans decreased 16 and 17 percent, respectively, from the previous week. Grain inspections were up 14 percent in the Mississippi Gulf and up 16 percent in the Pacific Northwest (PNW). Current outstanding (unshipped) export sales have continued to fall from last week for corn, wheat, and soybeans.

Truck Fleets Rewarding Fuel-Efficient Drivers

The American Trucking Association has historically identified driver wages and fuel prices as two of the main operational costs impacting trucking company rates; including for bulk load shipments such as grain and fertilizer. Previously, fuel-efficiency was gauged by strictly monitoring the miles traveled per gallon. However, an article in the April edition of Transport Topics describes how some trucking fleets are now employing new technology to reward fuel-efficient drivers. New onboard technology gauges driver fuel-efficiency to support performance-based pay. Providers of this technology offer the possibility to monitor fuel-efficiency factors that rely on the driver's performance such as optimal equipment procurement, idling, speeding and excessive revolutions per minute. For more information, see: <http://www.ttnews.com/articles/fleets-implementing-tracking-technology-fairly-reward-fuel-efficient-drivers>.

Snapshots by Sector

Export Sales

For the week ending April 26, **unshipped balances** of wheat, corn, and soybeans totaled 34.2 mmt, up 32 percent from the same time last year. Net weekly **wheat export sales** were .235 mmt, down 21 percent from the previous week. Net **corn export sales** were 1.02 mmt, up 46 percent from the previous week. Net **soybean export sales** totaled .416 mmt, up 30 percent from the previous week.

Rail

U.S. Class I railroads originated 23,954 **grain carloads** for the week ending April 28; down 8 percent from the previous week, up 1 percent from last year, and up 13 percent from the 3-year average.

Average May shuttle **secondary railcar** bids/offers per car were \$192 above tariff for the week ending May 3, down \$408 from last week, and \$396 higher than last year. Average non-shuttle secondary railcar bids/offers per car were \$1,068 (only Union Pacific) above tariff. There were no non-shuttle bids/offers last week or this week last year.

Barge

For the week ending May 5, **barge grain movements** totaled 884,164 tons, 20 percent higher than the previous week, and up 172 percent from the same period last year.

For the week ending May 5, 595 grain barges **moved down river**, 122 barges more than the previous week. There were 690 grain barges **unloaded in New Orleans**, 5 percent higher than the previous week.

Ocean

For the week ending May 3, 33 **ocean-going grain vessels** were loaded in the Gulf, unchanged from the same period last year. Forty vessels are expected to be loaded within the next 10 days, 15 percent less than the same period last year.

For the week ending May 3, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.25 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was \$24.00 per metric ton, unchanged from the previous week.

Fuel

For the week ending May 7, the U.S. average **diesel fuel price** increased 1 cent from the previous week to \$3.17 per gallon, 61 cents higher than the same week last year.

Feature Article/Calendar

Increased Farm Values Pushed Up the Landed Costs to Mexico

The landed costs of shipping grain to Mexico, via the water (barge/rail to ocean) and land (rail) routes, rose during the first quarter of 2018, primarily due to increased farm values. Compared to the previous quarter (see table below), landed costs of shipping corn, soybeans, and wheat through the water route increased by 5, 3, and 14 percent, respectively. The landed costs of shipping the same commodities through the land route increased by 3, 3, and 13 percent, respectively, during the quarter. In addition to the 7 percent increase in barge rates, the farm values of waterborne corn, soybeans, and wheat increased by 6, 3, and 21 percent, respectively, compared to the previous quarter. The farm values of the same commodities transported via land rose by 5, 4, and 21 percent, respectively.

Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico										
	Water route (to Veracruz)					Land route (to Guadalajara)				
	\$/metric ton					\$/metric ton				
	2017 1 st qtr.	2017 4 th qtr.	2018 1 st qtr.	Percent change Yr. to Yr.	Qtr. to Qtr.	2017 1 st qtr.	2017 4 th qtr.	2018 1 st qtr.	Percent change Yr. to Yr.	Qtr. to Qtr.
Corn										
Origin	IL					IA				
Truck	11.14	14.39	13.87	24.5	-3.6	3.99	4.91	4.94	23.8	0.6
Rail ¹						85.83	87.27	87.60	2.1	0.4
Barge	15.81	19.59	20.97	32.6	7.0					
Ocean ²	14.27	14.26	13.97	-2.1	-2.0					
Total transportation cost ³	41.22	48.24	48.81	18.4	1.2	89.82	92.18	92.54	3.0	0.4
Farm Value ⁴	138.71	128.60	136.21	-1.8	5.9	133.33	125.58	131.23	-1.6	4.5
Landed Cost ⁵	179.93	176.84	185.02	2.8	4.6	223.15	217.76	223.77	0.3	2.8
Transport % of landed cost	23	27	26			40	42	41		
Soybeans										
Origin	IL					NE				
Truck	11.14	14.39	13.87	24.5	-3.6	3.99	4.91	4.94	23.8	0.6
Rail						93.68	91.23	91.51	-2.3	0.3
Barge	15.81	19.59	20.97	32.6	7.0					
Ocean	14.27	14.26	13.97	-2.1	-2.0					
Total transportation cost	41.22	48.24	48.81	18.4	1.2	97.67	96.14	96.45	-1.2	0.3
Farm Value	367.31	349.07	359.48	-2.1	3.0	346.74	329.10	341.72	-1.4	3.8
Landed Cost	408.53	397.31	408.29	-0.1	2.8	444.41	425.24	438.17	-1.4	3.0
Transport % of landed cost	10	12	12			22	23	22		
Wheat										
Origin	KS					KS				
Truck	3.99	4.91	4.94	23.8	0.6	3.99	4.91	4.94	23.8	0.6
Rail	40.59	41.42	41.42	2.0	0.0	76.06	77.46	77.75	2.2	0.4
Ocean	14.27	14.26	13.97	-2.1	-2.0					
Total transportation cost	58.85	60.59	60.33	2.5	-0.4	80.05	82.37	82.69	3.3	0.4
Farm Value	125.54	128.97	155.92	24.2	20.9	125.54	128.97	155.92	24.2	20.9
Landed Cost	184.39	189.56	216.25	17.3	14.1	205.59	211.34	238.61	16.1	12.9
Transport % of landed cost	32	32	28			39	39	35		

¹Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates. BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table.

²Source: O'Neil Commodity Consulting

³Transportation costs for Kansas wheat transported via water route were revised from previous estimates

⁴Source: USDA/NASS

⁵Landed cost is total transportation cost plus farm value

Barge rates were impacted by river conditions, during the first quarter. In early 2018, low water and ice delayed barge traffic, on portions of the Mississippi and Illinois rivers, and kept weekly tonnages below average (see April 26, 2018 [Grain Transportation Report](#)). Water levels changed drastically in the second half of February, when significant rain events caused high water conditions. The high water conditions also slowed traffic and kept weekly tonnages below average. High water conditions led to increased barge freight rates, as barge companies incurred extra operating costs to handle longer transit times of barge movements. Truck rates declined 4 percent for waterborne corn and soybeans but increased 1 percent for waterborne wheat and the land route. Tariff rail rates remained relatively the same, compared to the previous quarter. Total transportation costs increased 1 percent for waterborne corn and soybeans, and

remained unchanged for waterborne wheat. For the land route, total transportation costs remained relatively unchanged for corn, soybeans and wheat, compared to the previous quarter.

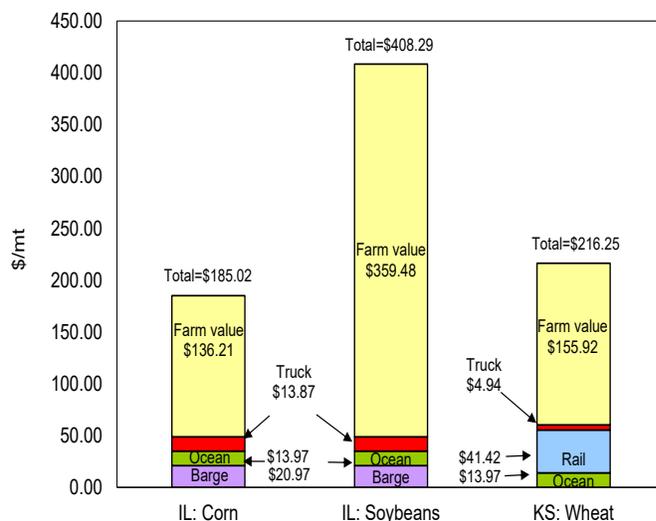
Year-to-year total transportation and landed costs were mixed. While year-to-year transportation costs increased for waterborne corn, soybeans, and wheat, landed costs increased for corn and wheat but remained the same for soybeans over the year. Similarly, year-to-year transportation costs increased for corn and wheat transported over the land route. However, while the landed cost for wheat increased over the year, landed cost for corn stayed the same. Soybean transportation and landed costs declined. During the quarter, the transportation share of the landed costs ranged from 12 to 28 percent for the water route and 22 to 41 percent for the land route (see table). Landed costs ranged from \$185 to \$408 per metric ton (mt) for the water route (see table and figure 1) and \$224 to \$438 per mt for the land route (see table and figure 2).

Market Analysis and Outlook

Between January and March of this year, Mexico imported 2.80 million metric tons (mmt) of corn, 0.90 mmt of soybeans and 0.72 mmt of wheat (FAS, GATS Data). The quantities of corn and wheat are less than during the same period last year. In contrast, the quantity of soybeans is more than during the same period a year ago. Mexico imported more corn, soybeans, and wheat from the United States during calendar year 2017, than in 2016. According to the USDA's Foreign Agricultural Service (FAS), Mexican grain imports are expected to increase ([USDA, FAS GAIN Report #: MX8010](#)). Total corn imports for marketing year (MY) 2018/19 are forecast at 16.8 mmt, a 5 percent increase over MY2017/18—driven by bullish demand for feed consumption.

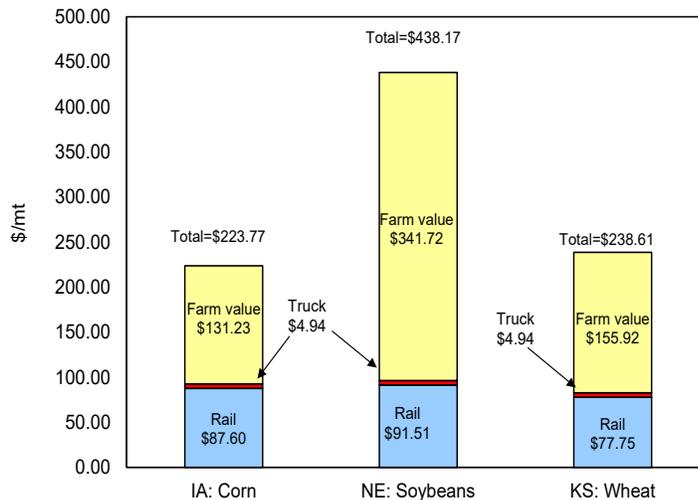
Similarly, Mexico's wheat imports for MY 2018/19 are forecast at 5.5 mmt, 6 percent more than the previous year ([USDA, FAS GAIN Report #: MX8010](#)). This increase is driven by greater demand from Mexico's domestic wheat flour industry and an insufficient domestic supply. Despite Mexico's efforts to source wheat from nontraditional suppliers, such as Russia and Ukraine, it imported 30 percent more wheat from the United States in 2017 than in the previous year. During the same period, imports from Russia and Ukraine fell by 32 and 22 percent, respectively. The quality of U.S. wheat and logistical advantages played a significant role in this shift. Based on a relatively positive outlook for Mexico's livestock sector and its population growth rate, oilseed imports from the U.S. are expected to increase by 2.3 percent in MY 2018/19 ([USDA, FAS GAIN Report #: MX8013](#)). The United States continues to be the largest supplier of soybeans to Mexico. surajudeen.olowolayemo@ams.usda.gov

Figure 1. Water route shipment costs (\$/mt) to Veracruz, Mexico



Source: USDA, Agricultural Marketing Service

Figure 2. Land route shipment costs (\$/mt) to Guadalajara, Mexico



Source: USDA, Agricultural Marketing Service

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators ¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
05/09/18	213	333	222	257	198	170
05/02/18	212	275	240	243	198	170

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)

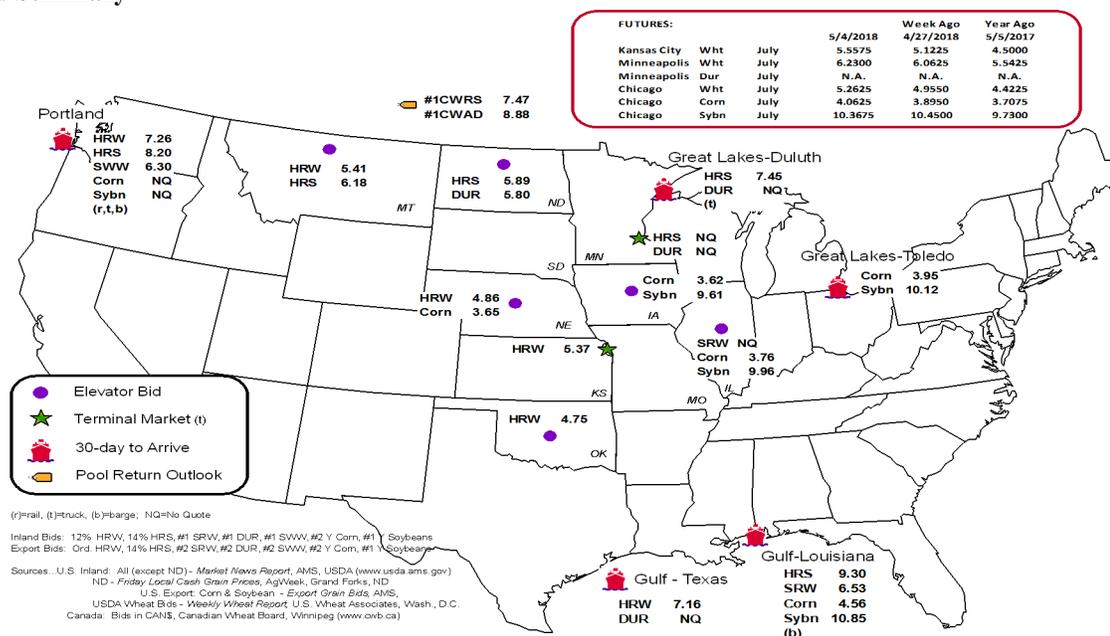
Commodity	Origin--Destination	5/4/2018	4/27/2018
Corn	IL--Gulf	-0.80	-0.89
Corn	NE--Gulf	-0.91	-0.98
Soybean	IA--Gulf	-1.24	-1.33
HRW	KS--Gulf	-1.79	-1.80
HRS	ND--Portland	-2.31	-2.26

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			
05/02/2018 ^p	126	573	6,637	572	7,908	4/28/2018	2,647
04/25/2018 ^r	691	1,316	6,338	927	9,272	4/24/2018	2,118
2018 YTD ^r	7,232	27,028	115,662	7,432	157,354	2018 YTD	33,612
2017 YTD ^r	12,378	35,299	110,283	10,152	168,112	2017 YTD	38,889
2018 YTD as % of 2017 YTD	58	77	105	73	94	% change YTD	86
Last 4 weeks as % of 2017 ²	458	52	116	257	109	Last 4wks % 2017	89
Last 4 weeks as % of 4-year avg. ²	120	55	147	222	125	Last 4wks % 4 yr	104
Total 2017	28,796	76,545	289,178	21,999	416,518	Total 2017	119,661
Total 2016	36,925	88,035	299,604	29,007	453,571	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.

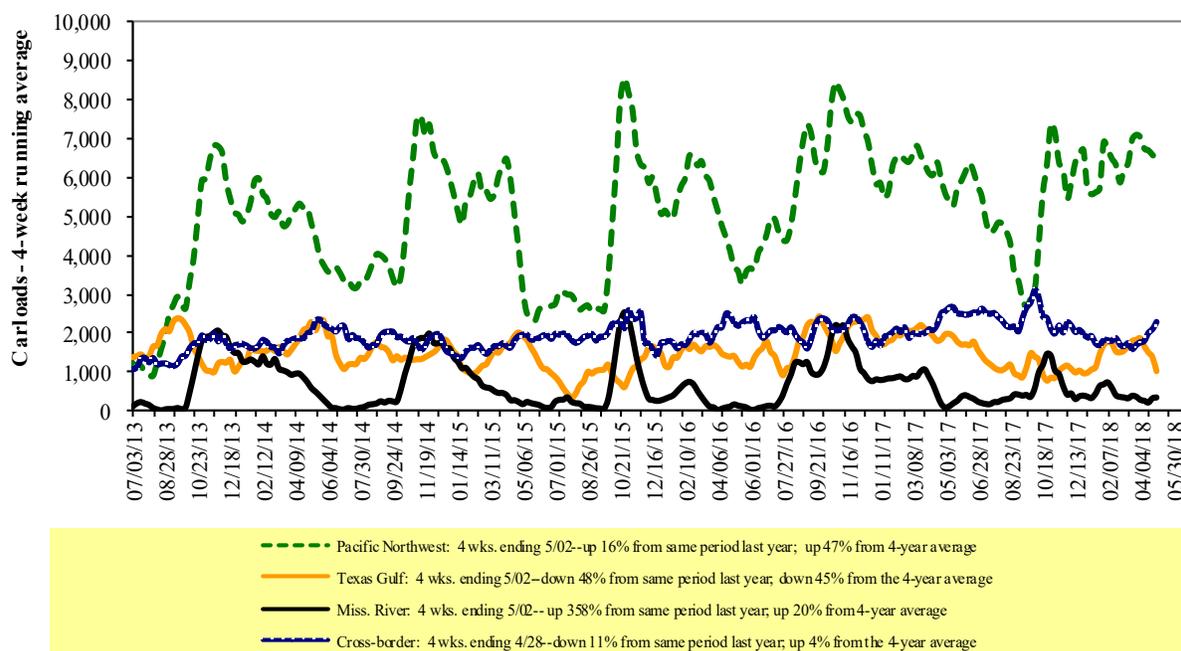
³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads to reflect switching between KCSM and Grupo Mexico.

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: 4/28/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,365	2,874	12,403	830	5,482	23,954	4,320	3,986
This week last year	1,449	2,454	13,510	1,075	5,220	23,708	3,041	4,082
2018 YTD	32,784	41,744	208,381	15,708	89,456	388,073	62,603	74,247
2017 YTD	31,751	47,744	193,639	16,695	104,320	394,149	67,117	73,009
2018 YTD as % of 2017 YTD	103	87	108	94	86	98	93	102
Last 4 weeks as % of 2017*	126	99	110	99	96	106	107	99
Last 4 weeks as % of 3-yr avg.**	121	96	127	104	105	116	113	104
Total 2017	89,465	142,744	578,964	50,223	289,574	1,150,970	198,633	244,766

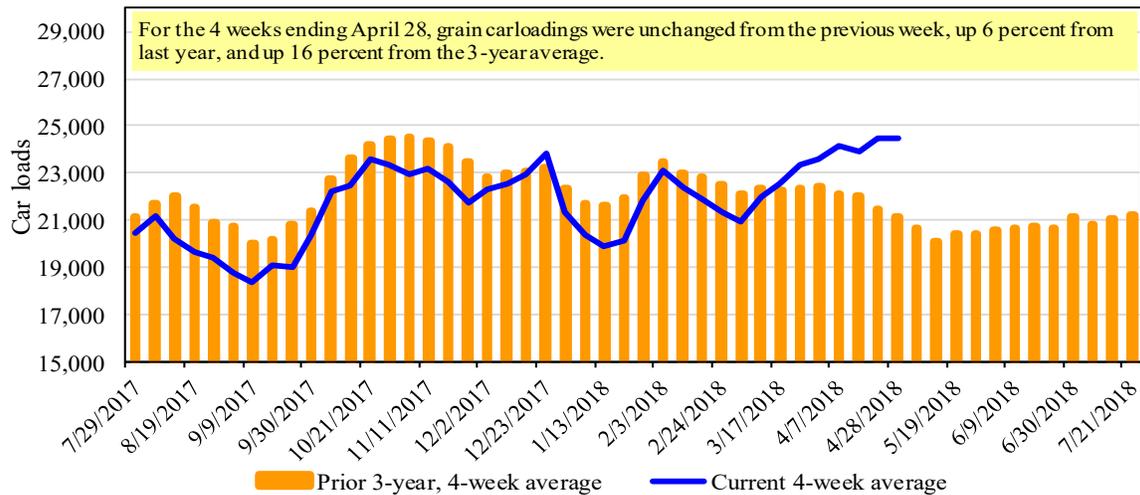
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 5/3/2018		Delivery period							
		May-18	May-17	Jun-18	Jun-17	Jul-18	Jul-17	Aug-18	Aug-17
BNSF ³	COT grain units	no offer	no bids	no offer	0	0	no bids	no bids	no bids
	COT grain single-car ⁵	no offer	0	no offer	0	0	0	0	no bids
UP ⁴	GCAS/Region 1	no offer	no bids	10	no bids	10	no bids	n/a	n/a
	GCAS/Region 2	no offer	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.

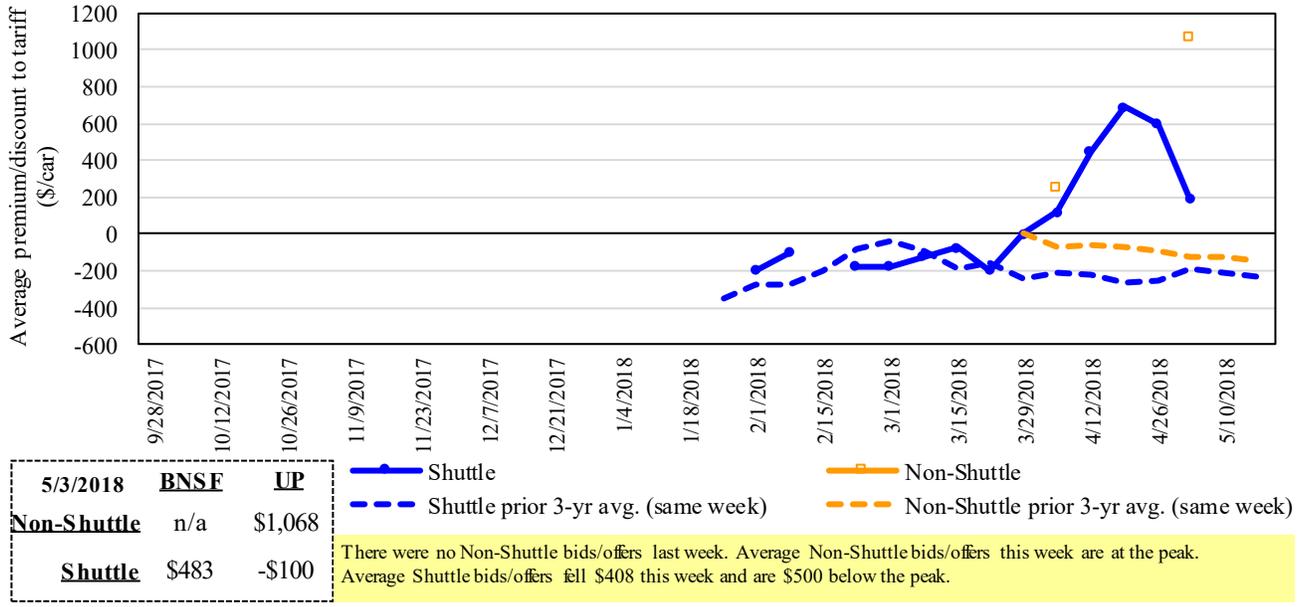
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

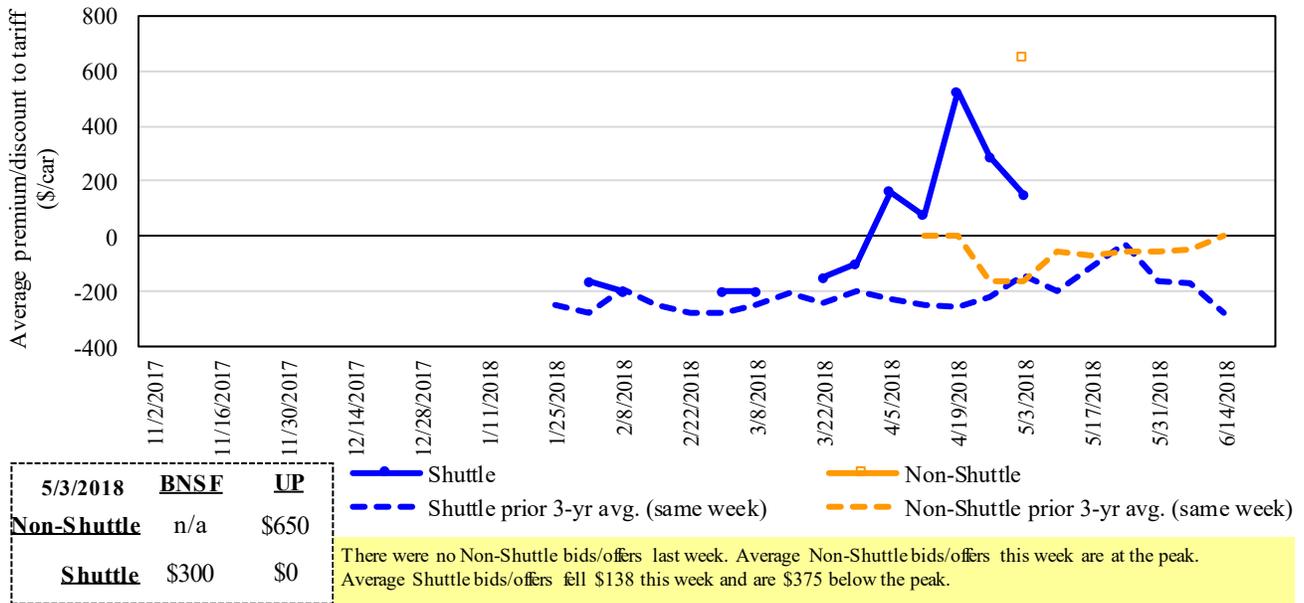
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



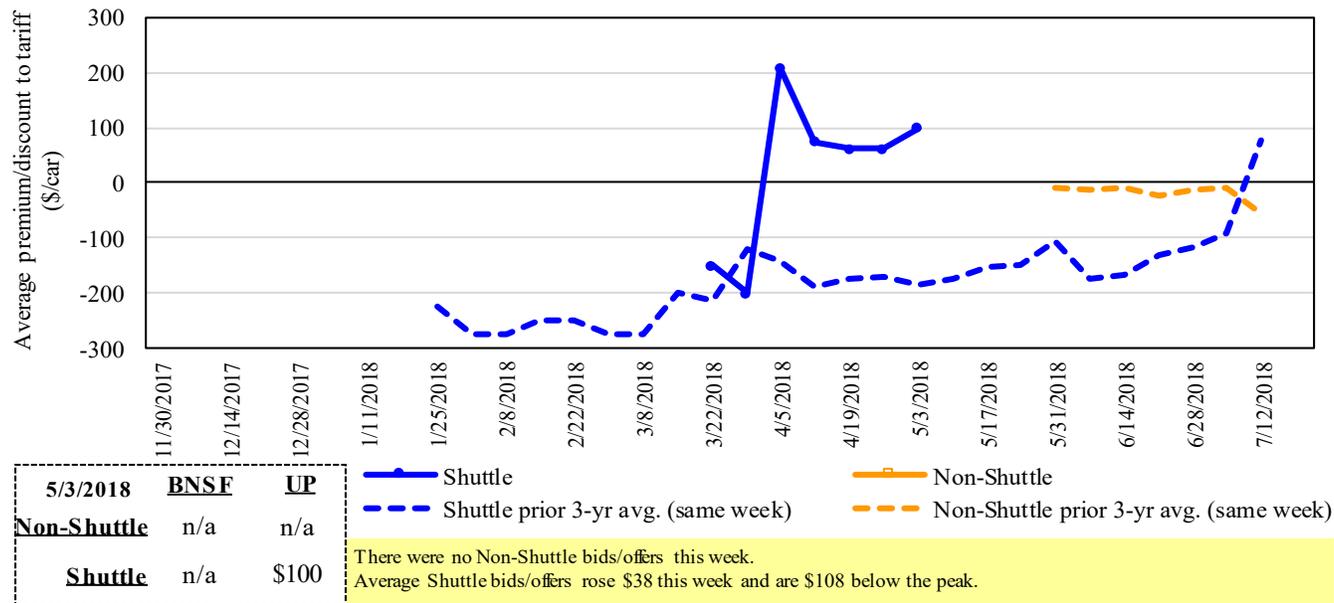
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in June 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 July 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:		Delivery period					
		May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-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	1068	650	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	483	300	n/a	n/a	n/a	n/a
	Change from last week	(517)	(200)	n/a	n/a	n/a	n/a
	Change from same week 2017	567	300	n/a	n/a	n/a	n/a
	UP-Pool	(100)	0	100	200	250	450
	Change from last week	(300)	(75)	37	0	0	100
	Change from same week 2017	225	250	263	n/a	n/a	(200)

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

May, 2018	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,883	\$91	\$39.46	\$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	\$160	\$46.68	\$1.27	5
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	1
	Northwest KS	Galveston-Houston, TX	\$4,816	\$176	\$49.57	\$1.35	5
	Amarillo, TX	Los Angeles, CA	\$5,021	\$244	\$52.29	\$1.42	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$181	\$40.83	\$1.04	9
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
	Des Moines, IA	Davenport, IA	\$2,258	\$38	\$22.80	\$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	\$113	\$36.96	\$0.94	3
	Des Moines, IA	Los Angeles, CA	\$5,327	\$328	\$56.16	\$1.43	5
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$171	\$42.72	\$1.16	16
	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	\$181	\$48.92	\$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	\$288	\$60.57	\$1.65	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	\$181	\$38.85	\$0.99	9
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0
	Des Moines, IA	Amarillo, TX	\$3,970	\$142	\$40.83	\$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
	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
Soybeans	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	\$209	\$49.49	\$1.35	7
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3
	Grand Island, NE	Portland, OR	\$5,710	\$295	\$59.63	\$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: May, 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	\$125	\$69.03	\$1.88	1
	KS	Guadalajara, JA	\$7,309	\$321	\$77.95	\$2.12	3
	TX	Salinas Victoria, NL	\$4,292	\$77	\$44.64	\$1.21	2
Corn	IA	Guadalajara, JA	\$8,313	\$287	\$87.87	\$2.23	2
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$265	\$84.58	\$2.15	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$258	\$78.03	\$1.98	3
	SD	Torreón, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$268	\$85.84	\$2.33	-5
	NE	Guadalajara, JA	\$8,692	\$292	\$91.79	\$2.50	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreón, CU	\$7,489	\$213	\$78.69	\$2.14	1
Sorghum	NE	Celaya, GJ	\$7,345	\$265	\$77.75	\$1.97	3
	KS	Queretaro, QA	\$7,819	\$157	\$81.49	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$126	\$67.20	\$1.71	5
	NE	Torreón, CU	\$6,790	\$205	\$71.47	\$1.81	4

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

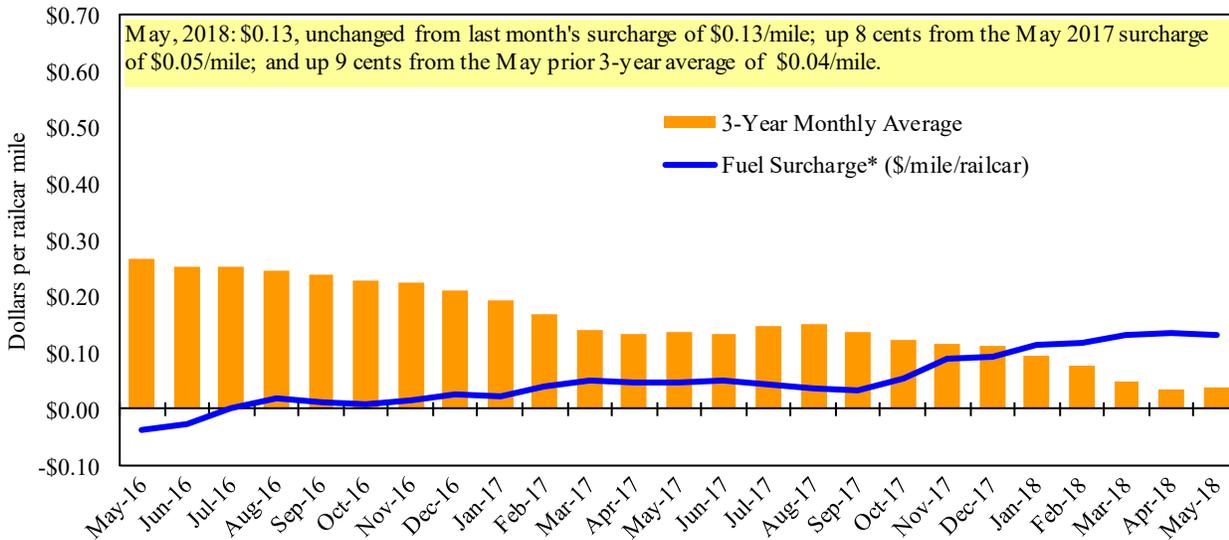
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

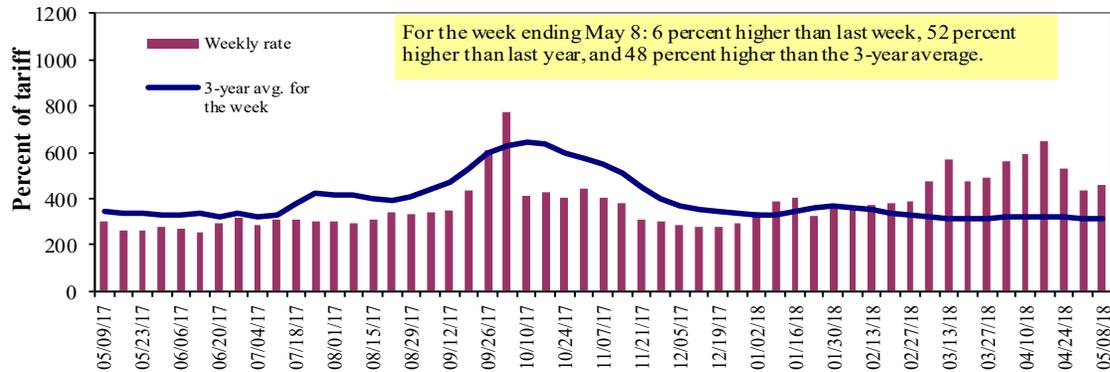
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	5/8/2018	-	-	463	350	330	330	308
	5/1/2018	-	438	438	350	392	392	338
\$/ton	5/8/2018	-	-	21.48	13.97	15.48	13.33	9.67
	5/1/2018	-	23.30	20.32	13.97	18.38	15.84	10.61
Current week % change from the same week:								
	Last year	-	-	52	75	61	61	71
	3-year avg. ²	-	-	48	55	49	49	49
Rate¹	June	493	445	438	325	325	325	288
	August	505	445	438	325	363	363	313

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" = no quote

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.

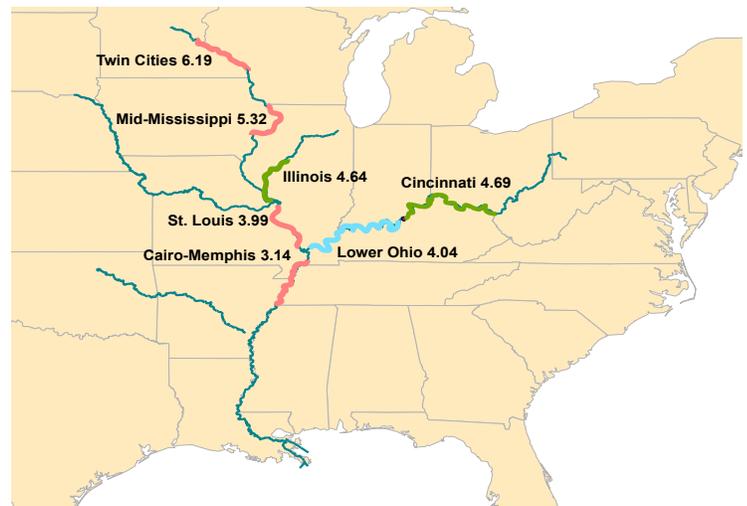
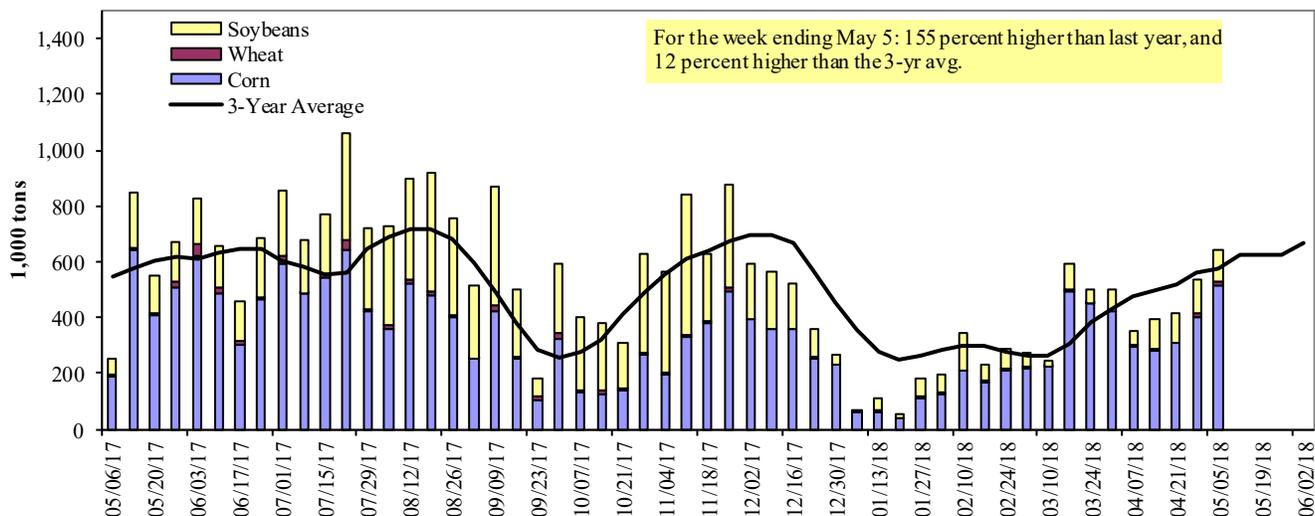


Figure 10

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 05/05/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	225	3	56	2	286
Winfield, MO (L25)	385	8	69	2	463
Alton, IL (L26)	504	8	104	2	618
Granite City, IL (L27)	516	16	110	2	643
Illinois River (L8)	119	0	43	0	162
Ohio River (L52)	83	14	52	0	149
Arkansas River (L1)	6	22	64	0	92
Weekly total - 2018	604	52	227	2	884
Weekly total - 2017	228	25	72	0	326
2018 YTD ¹	6,400	555	3,717	55	10,727
2017 YTD	8,281	766	4,371	135	13,553
2018 as % of 2017 YTD	77	72	85	41	79
Last 4 weeks as % of 2017 ²	98	64	118	166	101
Total 2017	22,242	2,210	16,123	360	40,936

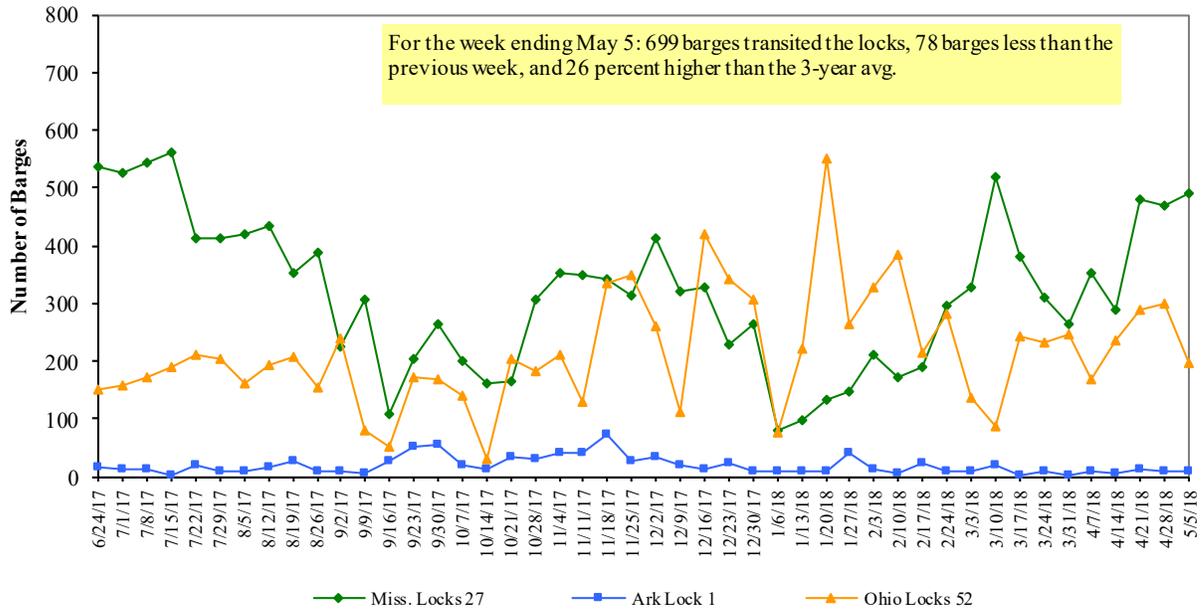
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2017.

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

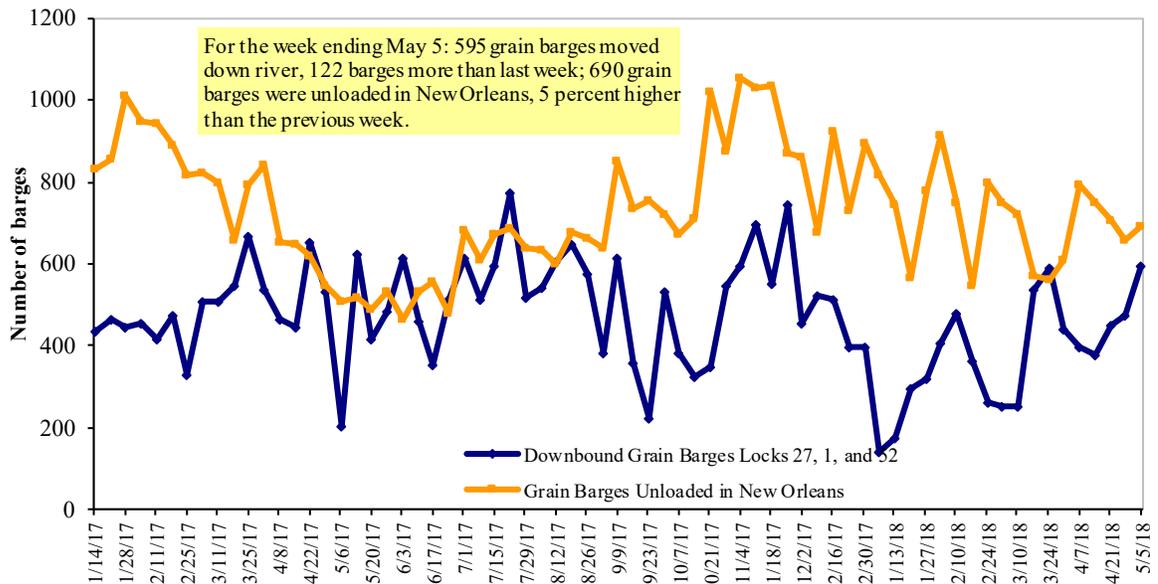
Source: U.S. Army Corps of Engineers

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 5/7/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.178	0.016	0.566
	New England	3.215	0.012	0.573
	Central Atlantic	3.336	0.015	0.583
	Lower Atlantic	3.061	0.019	0.554
II	Midwest ²	3.092	0.009	0.595
III	Gulf Coast ³	2.955	0.009	0.545
IV	Rocky Mountain	3.249	0.034	0.598
V	West Coast	3.662	0.022	0.816
	West Coast less California	3.409	0.015	0.662
	California	3.863	0.029	0.936
Total	U.S.	3.171	0.014	0.606

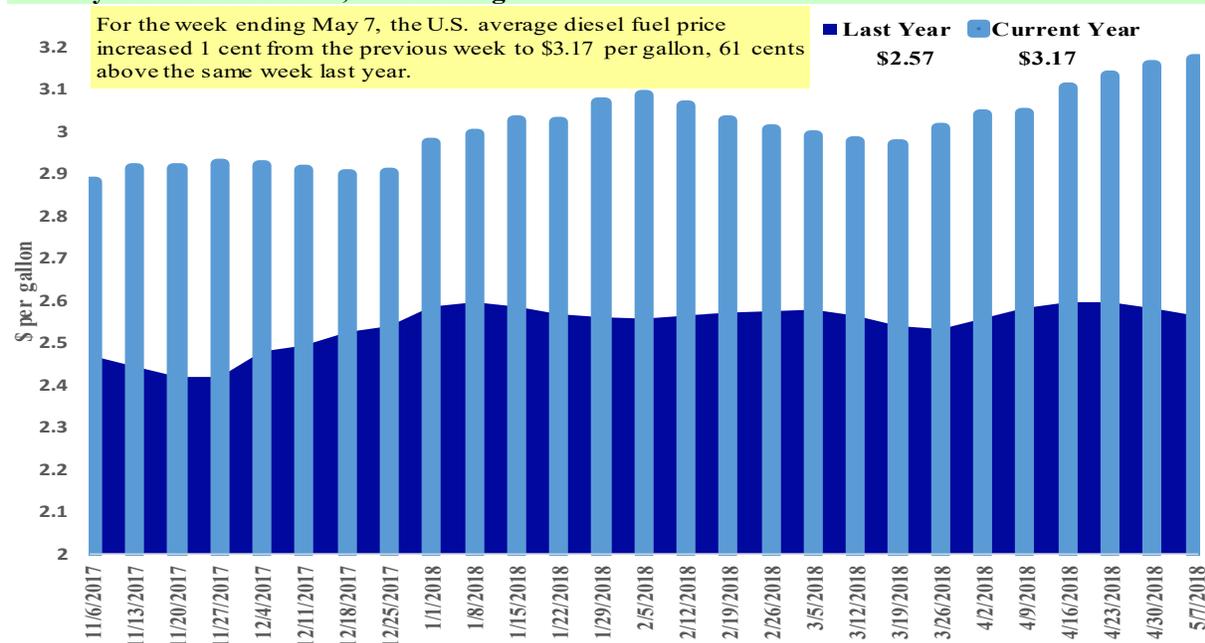
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
4/26/2018	738	412	932	749	22	2,852	20,091	11,285	34,229
This week year ago	1,664	287	1,325	1,117	124	4,517	14,603	6,834	25,954
Cumulative exports-marketing year²									
2017/18 YTD	8,529	2,093	5,135	4,522	372	20,651	30,910	43,485	95,047
2016/17 YTD	10,123	2,132	7,171	3,646	383	23,456	37,213	49,842	110,511
YTD 2017/18 as % of 2016/17	84	98	72	124	97	88	83	87	86
Last 4 wks as % of same period 2016/17	46	153	83	72	40	70	144	166	137
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 4/26/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			
Mexico	13,045	12,372	5	12,297
Japan	9,251	10,112	(9)	11,450
Korea	4,175	5,459	(24)	4,494
Colombia	3,805	3,914	(3)	4,179
Peru	2,596	2,664	(3)	2,693
Top 5 Importers	32,871	34,521	(5)	35,113
Total US corn export sales	51,002	51,816	(2)	49,308
% of Projected	90%	89%		
Change from prior week²	1,020	771		
Top 5 importers' share of U.S. corn export sales	64%	67%		71%
USDA forecast, April 2018	56,616	58,346	(3)	
Corn Use for Ethanol USDA forecast, April 2018	141,605	137,973	3	

(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/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 4/26/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
China	28,733	35,793	(20)	31,881
Mexico	4,049	3,395	19	3,452
Indonesia	1,963	1,846	6	1,987
Japan	1,840	1,944	(5)	2,067
Netherlands	1,320	1,553	(15)	2,098
Top 5 importers	37,905	44,531	(15)	41,486
Total US soybean export sales	54,770	56,676	(3)	52,919
% of Projected	97%	96%		
Change from prior week ²	416	319		
Top 5 importers' share of U.S. soybean export sales	69%	79%		78%
USDA forecast, April 2018	56,267	59,237	95	

(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 4/26/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18	2016/17		
	Current MY	Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	2,899	2,762	5	2,620
Mexico	2,946	3,183	(7)	2,743
Philippines	2,535	2,664	(5)	2,395
Brazil	128	1,215	(89)	862
Nigeria	1,188	1,603	(26)	1,254
Korea	1,485	1,389	7	1,104
China	900	1,419	(37)	1,623
Taiwan	1,134	1,045	9	768
Indonesia	1,130	1,087	4	726
Colombia	660	859	(23)	635
Top 10 importers	15,004	17,226	(13)	14,729
Total US wheat export sales	23,503	27,973	(16)	22,804
% of Projected	93%	97%		
Change from prior week ²	235	258		
Top 10 importers' share of U.S. wheat export sales	64%	62%		65%
USDA forecast, April 2018	25,204	28,747	(12)	

(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 05/03/18	Previous Week*	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	196	278	71	4,158	5,092	82	78	98	14,805
Corn	691	404	171	7,233	5,283	137	159	210	10,928
Soybeans	69	145	48	3,946	3,935	100	61	113	13,246
Total	957	827	116	15,338	14,310	107	109	147	38,978
Mississippi Gulf									
Wheat	70	34	207	1,549	1,696	91	72	91	4,198
Corn	912	829	110	11,558	13,298	87	138	126	28,690
Soybeans	343	298	115	8,867	10,349	86	108	158	32,911
Total	1,325	1,161	114	21,974	25,343	87	123	129	65,800
Texas Gulf									
Wheat	5	43	11	1,516	2,418	63	44	62	6,354
Corn	0	22	0	216	316	68	176	132	733
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	292
Total	5	65	7	1,732	2,734	63	50	68	7,379
Interior									
Wheat	37	17	210	528	636	83	116	121	1,727
Corn	235	191	123	2,756	2,724	101	104	129	8,758
Soybeans	103	175	59	2,150	1,816	118	139	178	5,508
Total	375	384	98	5,433	5,176	105	116	143	15,993
Great Lakes									
Wheat	37	41	92	135	110	123	140	128	711
Corn	44	3	n/a	70	45	157	157	139	192
Soybeans	0	0	n/a	0	53	0	0	0	890
Total	81	44	186	205	207	99	121	123	1,793
Atlantic									
Wheat	0	0	n/a	64	37	174	0	0	46
Corn	0	7	0	38	5	831	n/a	540	32
Soybeans	47	55	84	852	829	103	120	223	2,001
Total	47	62	75	953	871	109	143	169	2,079
U.S. total from ports*									
Wheat	345	413	84	7,950	9,988	80	73	90	27,841
Corn	1,883	1,456	129	21,870	21,671	101	140	147	49,333
Soybeans	561	674	83	15,815	16,982	93	103	157	54,847
Total	2,789	2,543	110	45,635	48,641	94	113	133	132,021

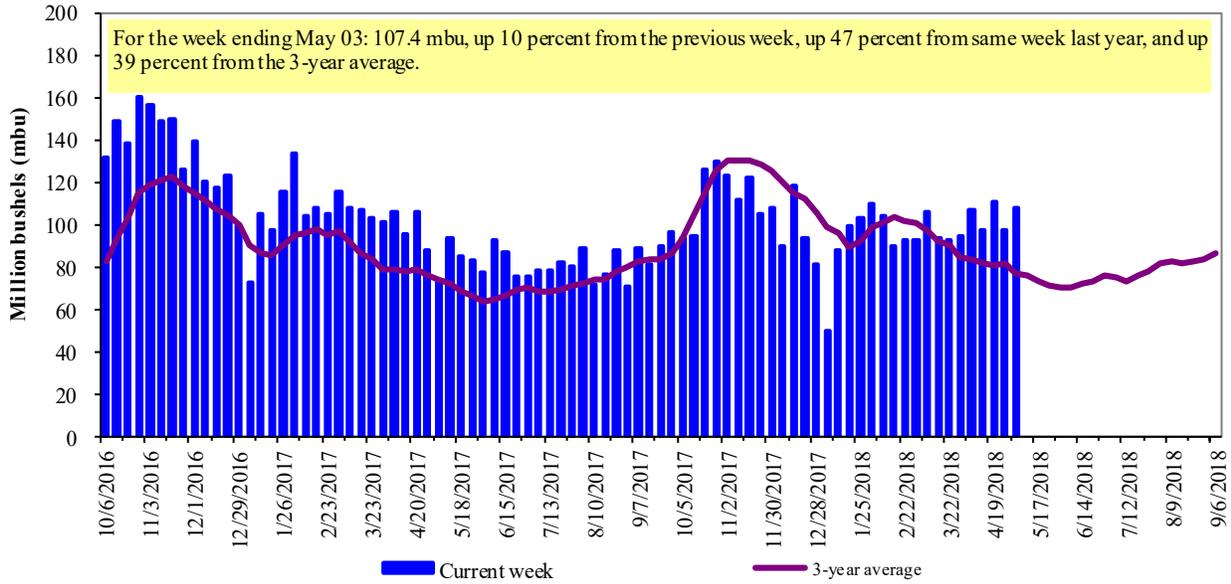
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

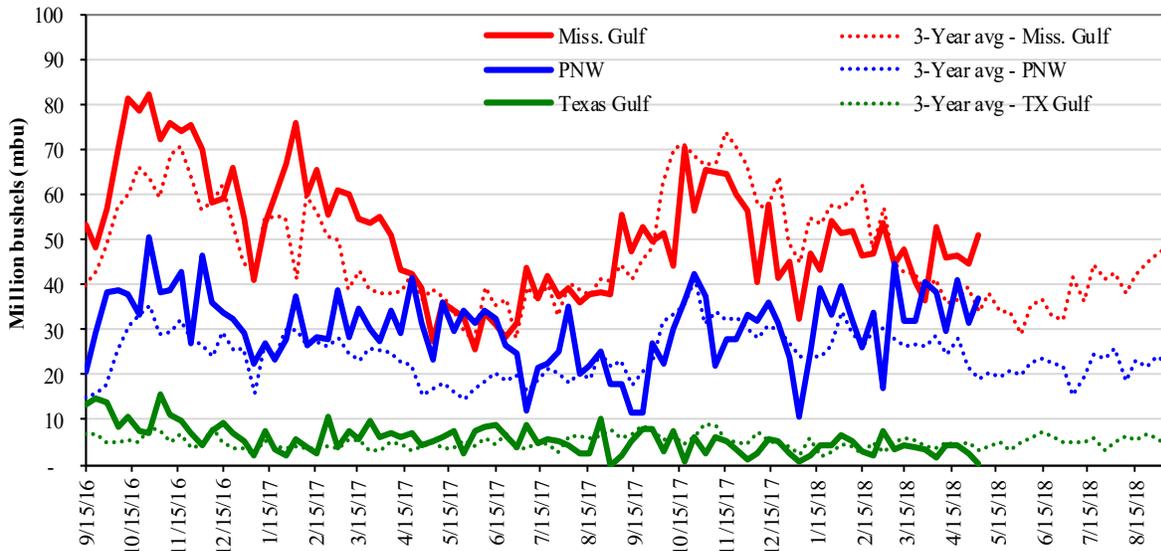
U.S. grain inspected for export (wheat, corn, and soybeans)



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)



<u>Week ending 05/03/18 inspections (mbu):</u>		<u>Percent change from:</u>			
Mississippi Gulf:	51.1	Last Week:	MS Gulf up 14	TX Gulf down 93	U.S. Gulf up 8
PNW:	37.0	Last Year (same week):	up 87	down 97	up 57
Texas Gulf:	0.2	3-yr avg. (4-wk. mov. Avg):	up 40	down 96	up 26
					up 59

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

Ocean Transportation

Table 17

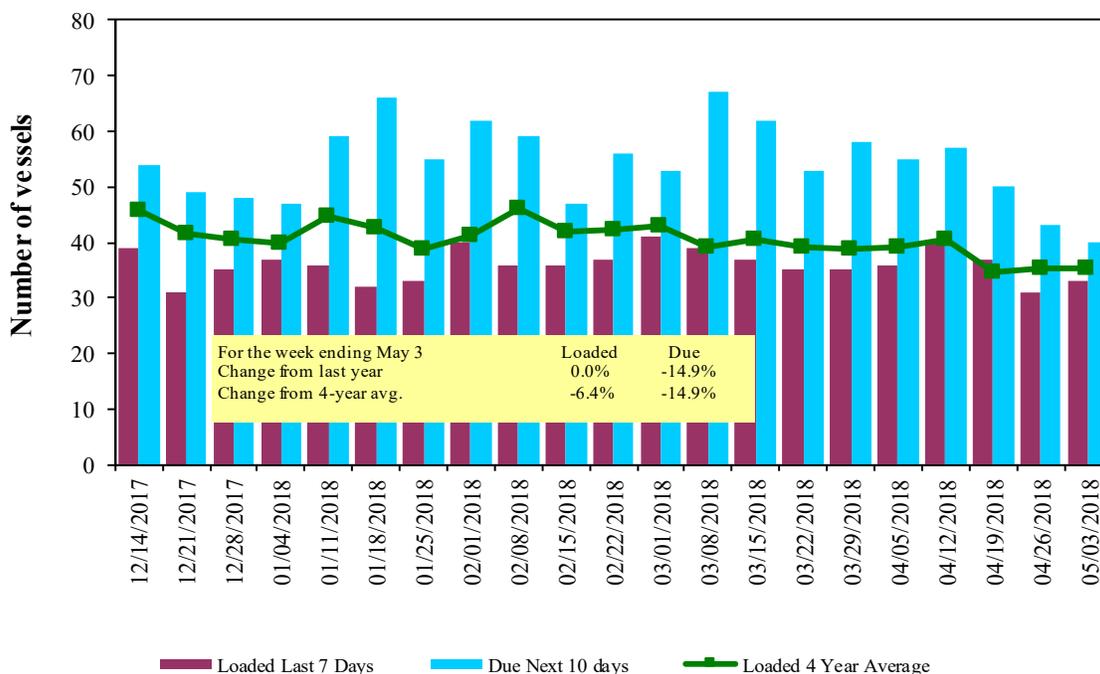
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
5/3/2018	43	33	40	30
4/26/2018	48	34	43	26
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

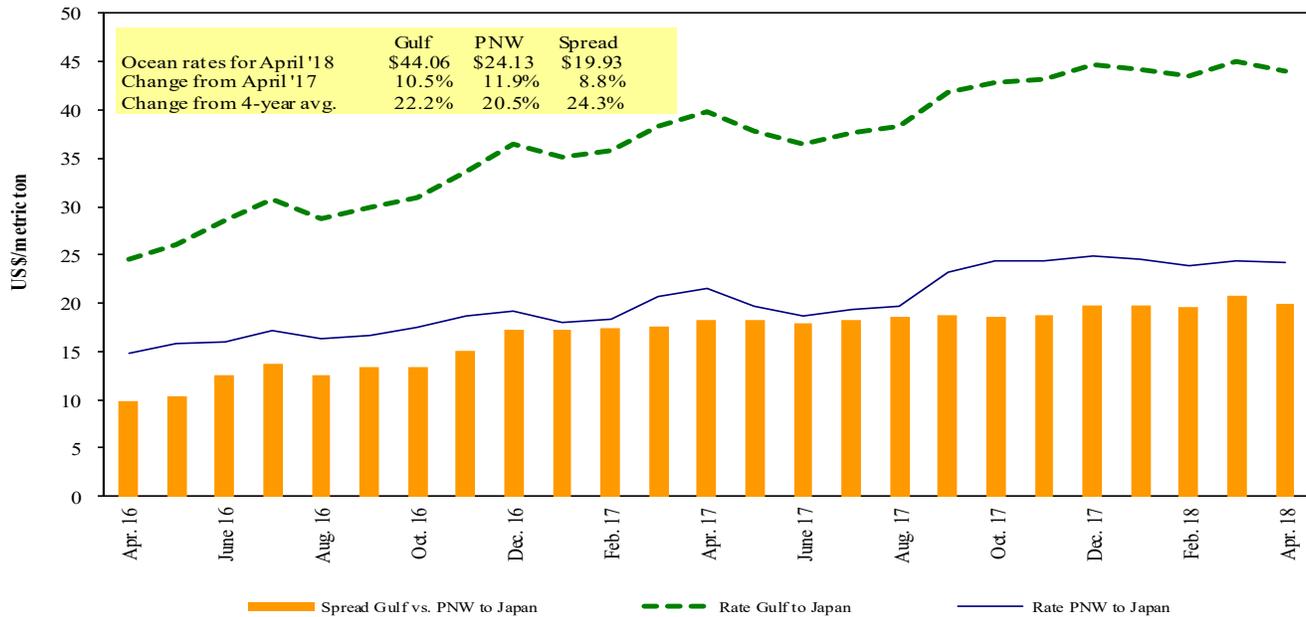
U.S. Gulf Vessel Loading Activity



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 05/05/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Djibouti	Sorghum	Apr 16/26	18,200	69.87*
U.S. Gulf	Rotterdam	Heavy Grain	Apr 17/30	65,000	21.00
U.S. Gulf	Somalia	Sorghum	Apr 16/26	40,000	130.77*
PNW	Bangladesh	Wheat	Apr 6/16	43,500	63.35*
Brazil	China	Heavy Grain	May 3/31	60,000	35.50
Brazil	China	Heavy Grain	Apr 25/30	60,000	35.00
Brazil	China	Heavy Grain	Apr 20/30	60,000	34.00
Brazil	China	Heavy Grain	Apr 3/12	66,000	36.25
Brazil	China	Heavy Grain	Mar 12/21	66,000	32.00
Brazil	China	Heavy Grain	Mar 1/10	66,000	30.00
EC S. America	China	Heavy Grain	Mar 15/24	60,000	33.50

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

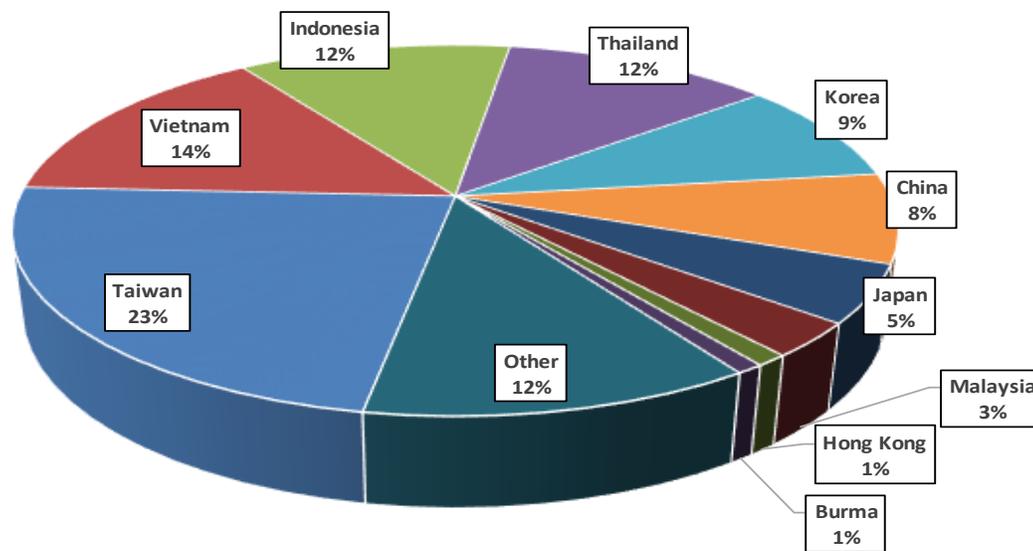
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2017, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2017 went to Asia, of which 10 percent were moved in containers. Approximately 93 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-February 2018

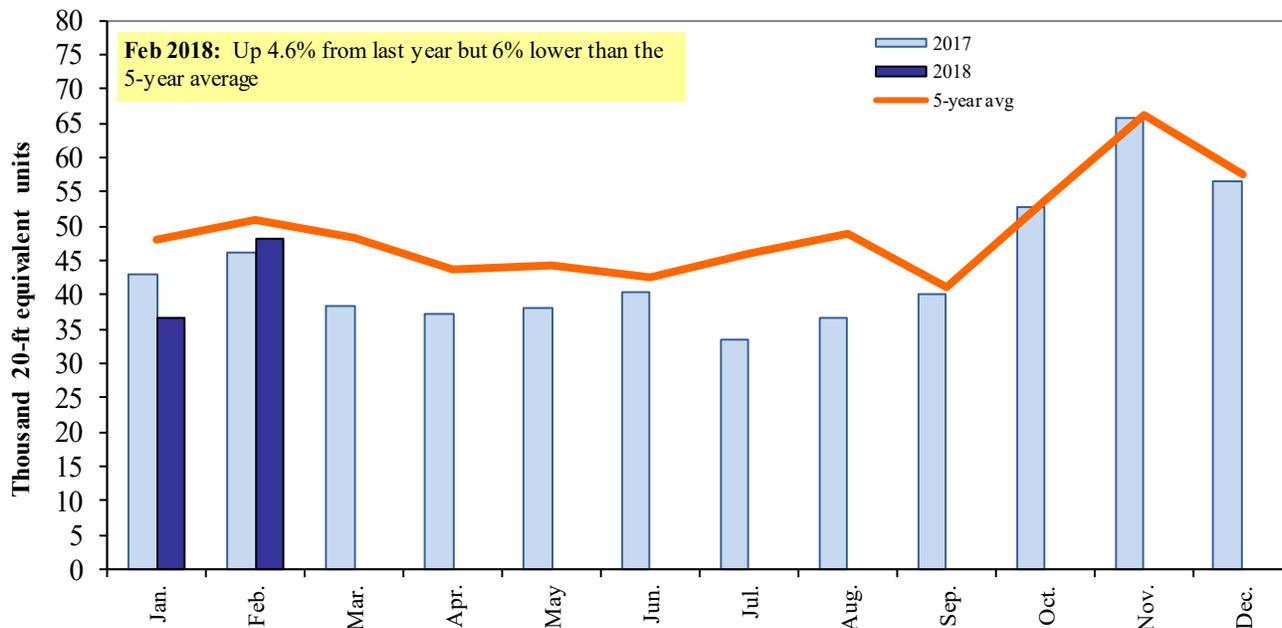


Service (PIERS) data

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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