



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service

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June 1, 2017

WEEKLY HIGHLIGHTS

Contents

Article/
Calendar

Grain
Transportation
Indicators

Rail

Barge

Truck

Exports

Ocean

Brazil

Mexico

Grain Truck/Ocean
Rate Advisory

Datasets

Specialists

Subscription
Information

The next
release is
June 8, 2017

Grain Barge Tonnages Drop in May Due to High Water

Persistent rainfall throughout the spring has caused high water conditions that have slowed and sometimes halted navigation on portions of the Nation's inland waterways. As of May 31, there are no lock closures due to high water levels. Grain barge traffic for May on the Upper Mississippi, Ohio, and Arkansas Rivers was 2.8 million tons, 16 percent lower than the 3-year average for May. However, even with the less-than-ideal navigation conditions, current spot barge freight rates for export grain at principle origins remain 1 to 17 percent below the 3-year average for the end of May. The Lower Mississippi River is also experiencing high water conditions causing daylight only transit in certain areas. Repair work that was scheduled to begin in early June at La Grange Lock on the Illinois River has been postponed until the water level on the river recede. When the La Grange repair work begins, the lock will be closed for 10 hours each day and opened to traffic for 14 hours each day, until the repairs are finished.

Grain Inspections Down Slightly but Remain Above Average

For the week ending May 25, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2.2 million metric tons (mmt), down 3 percent from the previous week, but up 43 percent from the same time last year and 24 percent above the 3-year average. Total inspections of corn were up 2 percent from the past week, with volumes remaining above 1 mmt. Wheat and soybean inspections, however, decreased 10 and 5 percent, respectively, from the past week. Pacific Northwest (PNW) grain inspections increased 15 percent from the previous week, as corn inspections jumped 28 percent. In the Mississippi Gulf region, grain inspections decreased 5 percent from the previous week. Outstanding export sales of grain remained lower for corn and wheat, but continued to increase for soybeans.

Strong Grain Carloads by Rail: Increase in Secondary Railcar Market

Average offers/bids in the secondary market for June rail shuttle service have increased the past two weeks since May 11 (**Figure 4**), which could reflect an increase in the demand for transportation from rail shippers. Since May 6, weekly grain carloads originated by U.S. Class I railroads have similarly increased. Typically, grain carloads decline in April and May, but they have remained well above-average for several weeks (**Figure 3**). According to the Association of American Railroads, year-to-date grain carloads were 11 percent above 2016 for the week ending May 20. Total carload traffic is up 7 percent so far in 2017 compared to last year, with coal seeing a 19 percent jump.

Snapshots by Sector

Export Sales

For the week ending May 18, **unshipped balances** of wheat, corn, and soybeans totaled 22.7 mmt, up 12 percent from the same time last year. Net weekly **wheat export sales** were .202 mmt, down 19 percent from the previous week. Net **corn export sales** were .457 mmt, down 35 percent from the previous week, and net **soybean export sales** were .473 mmt, up 33 percent from the past week.

Rail

U.S. Class I railroads originated 23,997 **grain carloads** for the week ending May 20, up 3 percent from the previous week, up 24 percent from last year, and up 20 percent from the 3-year average.

Average June shuttle **secondary railcar** bids/offers per car were \$307 above tariff for the week ending May 25, up \$269 from last week, and \$419 higher than last year. Average non-shuttle secondary railcar bids/offers per car were \$40 below tariff, down \$40 from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending May 27, **barge grain movements** totaled 785,420 tons, 20 percent higher than the last week, and down 7 percent from the same period last year.

For the week ending May 27, 482 grain barges **moved down river**, up 15 percent from last week, 533 grain barges were **unloaded in New Orleans**, up 9 percent from the previous week.

Ocean

For the week ending May 25, 31 **ocean-going grain vessels** were loaded in the Gulf, 11 percent more than the same period last year. Sixty-one vessels are expected to be loaded within the next 10 days, 22 percent more than the same period last year.

For the week ending May 25, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$37 per metric ton, 1 percent less than the previous week. The cost of shipping from the PNW to Japan was \$19 per metric ton, 3 percent less than the previous week.

Fuel

During the week ending May 29, **average diesel fuel prices** increased 3 cents from the previous week at \$2.57 per gallon, 19 cents higher than the same week last year.

Feature Article/Calendar

AMS-TSD Releases Profiles of Top U.S. Agricultural Ports, 2015

USDA's Agricultural Marketing Service recently published [Profiles of Top U.S. Agricultural Ports](#). In an easy to read fashion, this report summarizes the movements of agricultural imports and exports through U.S. ocean ports. The report provides summary information on cargo movements through the top 20 U.S. ports for agricultural trade, showing breakouts of the top containerized and bulk agricultural products moving through the individual ports. It also depicts the use of refrigeration, the top origin and destination markets, and the top shipping lines used. The data used for the report come from the Port Import Export Reporting Service (PIERS), which collects and aggregates bills of lading and manifest data to provide a view of agricultural trade by how it moves through the ocean transportation network.¹ This article provides a brief introduction of the top five ports in 2015. Readers seeking information on all 20 of the ports are encouraged to view the full publication on our website using the link provided above.

Top 5 U.S. Ports Moving Waterborne Agricultural Trade

In 2015, more than 186 million metric tons of waterborne agricultural cargo moved through U.S. seaports, which is an aggregation of both exports and imports. By volume, the top five ports moving waterborne agricultural trade were the New Orleans Ports Region² (36 percent of total U.S. waterborne agricultural trade), New York/New Jersey (6 percent), Kalama (5 percent), Houston (5 percent), and Los Angeles (4 percent). Table 1 summarizes the tonnages of total agricultural export and import, along with their percentages of the total, moved by these ports. Together, these five ports represent about 56 percent of the waterborne agricultural trade in 2015. Exports largely dominate U.S. agricultural trade, with imports only accounting for 24 percent. The New Orleans Port Region is the leading seaport, moving 46 percent of the total exports and 36 percent of total waterborne agricultural trade.

Table 1: Top 5 U.S. Ports Moving Waterborne Agricultural Trades, Total, and Shares

Rank	U.S. Ports	State	Imports (Metric Tons)	% of Total Import	Export (Metric Tons)	% of Total export	Total (Metric Tons)	Share
1	New Orleans Ports Region	LA	1,680,820	3.8%	65,846,219	46.3%	67,527,039	36%
2	New York/New Jersey	NY	8,661,345	19.7%	1,743,929	1.2%	10,405,273	6%
3	Kalama	WA	0	0.0%	8,736,975	6.1%	8,736,975	5%
4	Houston	TX	2,160,880	4.9%	6,433,753	4.5%	8,594,633	5%
5	Los Angeles	CA	2,564,535	5.8%	5,499,759	3.9%	8,064,294	4%

Source: PIERS, 2015.

Each of the major coastlines and their respective seaports offer unique opportunities and services for agricultural shippers. The grain industry takes advantage of the vast transportation system around the country to move grain and agricultural products through all major seaports.

Top U.S. Export and Import Ports

New Orleans moved the largest amount of agricultural trade in 2015, with 65.8 million metric tons (mmt) of exports and 8.6 mmt of imports. The ports in this area bring all modes of transportation (ocean, barge, rail, and truck) together by allowing ocean-going vessels to serve ports 228 miles upriver from the Gulf of Mexico through 11 individual ports. The Port of Kalama, located northwest of Portland, OR, is an important port for bulk exports through the Pacific Northwest (PNW). With an industrial area of about 7 miles of riverfront property adjacent to the deep-draft navigation channel of the Columbia River, Kalama handled 8.7 million metric tons of grain and animal feed exports in 2015. More than 99 percent of agricultural exports through New Orleans and Kalama moved in bulk vessels. The Port of Houston, ranked third for total waterborne agricultural exports in 2015 and is a 25-mile complex of public and private facilities located in the Gulf of Mexico. Houston moved more than 6.4 mmt of agricultural exports, about 17 percent of which were containerized and 31 percent were refrigerated.

Different from the Gulf seaports, the agricultural cargos shipped through Los Angeles, Long Beach, and Tacoma move primarily by container rather than bulk.³ The large population base and extensive transportation network in that region attracts a significant percentage of consumer import products, which are almost exclusively moved in

¹ The data are not considered official trade data, as only the waterborne portions of the trade are provided.

² Includes New Orleans, South Louisiana, St. Rose, Destrehan, Baton Rouge, Avondale, and Gramercy. Ports situated along the Mississippi River from Baton Rouge to Myrtle Grove, LA, are often referred to as "New Orleans" or the "New Orleans Port Region."

³ Since 2015, Tacoma and Seattle formed the Northwest Seaports Alliance: <https://www.nwseaportalliance.com/#/maps/overview>

containers. These imports leave a pool of empty containers used by the U.S. export market. West Coast ports also provide direct access to some of our country's largest export markets in Eastern Asian countries.

Table 2 and Table 3 show the top five U.S. export and import ports for agricultural products in 2015. These tables demonstrate that a variety of U.S. regions support U.S. agricultural trade and help meet domestic and global demand. The United States is the top supplier of grain and oilseeds globally and, as such, these products are among the top agricultural commodities exported from each of the ports listed. On the other hand, beverages (both alcoholic and non-alcoholic), wine, meat, fruit, and grocery items are major import commodities. While the Gulf and Pacific Northwest operate mostly as bulk ports for grain shipments, agricultural trade through major seaports on the East and West coasts are mostly high-valued containerized products.

Table 2: Top 5 U.S. Export Ports Moving Waterborne Agricultural Trades

Rank	U.S. Ports	Metric Tons (% of Share)	% of containers	% of Refrigerated	Top Export Commodities	Top Trade Partners
1	New Orleans Ports Region	65,846,219 (46%)	1%	1%	Grain Products, Soybeans, Animal feed	China, Japan, Mexico
2	Kalama	8,736,975 (6%)	0%	0%	Soybeans, Bulk grains, Grain Products	China, Japan, South Korea
3	Houston	6,433,753 (5%)	17%	31%	Bulk Grains, Candy Confections, Grain Products	Canada, China, Mexico
4	Los Angeles	5,499,759 (4%)	100%	14%	Animal Feed, Soybeans, Cotton	China, Japan, Taiwan
5	Tacoma	5,436,342 (4%)	55%	20%	Soybeans, Animal Feed, Grain Products	China, Japan, Taiwan

Source: PIERs, 2015.

Table 3: Top 5 U.S. Import Ports Moving Waterborne Agricultural Trades

Rank	U.S. Ports	Metric Tons (% of Share)	% of containers	% of Refrigerated	Top Import Commodities	Top Trade Partners
1	New York/New Jersey	8,661,344 (20%)	86%	23%	Non-Alcoholic Beverage, Wine, Beer/Ale	Italy, China, Brazil
2	Philadelphia	3,139,143 (7%)	56%	50%	Wine, Meat, Fruit	Canada, Australia, New Zealand
3	Los Angeles	2,564,535 (6%)	97%	40%	Fruit, Grocery Items, Non-Alcoholic Beverage	China, Thailand, Chile
4	Long Beach	2,509,078 (6%)	91%	32%	Non-Alcoholic Beverage, Beer/Ale, Grocery Items	China, New Zealand, Australia
5	Houston	2,160,880 (5%)	79%	32%	Beer/Ale, Guar Gum, Non-Alcoholic Beverage	India, Costa Rica, Belgium

Source: PIERs, 2015.

The top U.S. agricultural import ports are concentrated in the most populated regions of the country, such as the Northeast and California. The top two import ports of agricultural products, New York/New Jersey and Philadelphia (see Table 3), handled only about a quarter of the total U.S. waterborne agricultural imports in 2015 from a variety of origins including Europe, Eastern Asia, South America, and Australia. California seaports transported just over 10 percent of the imports mostly from Eastern Asian and southwestern Pacific countries (see Table 3).

Conclusion

The agricultural community uses ocean transportation networks extensively to serve its global customers. The *Profiles of Top U.S. Agricultural Ports* provides a view of the top 20 U.S. ocean ports moving U.S. agricultural export and import traffic, along with shipping lines used, and destination and origin countries.

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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			
05/24/2017 ^p	432	866	6,758	294	8,350	5/20/2017	2,366
05/17/2017 ^r	427	1,624	5,520	87	7,658	5/13/2017	2,681
2017 YTD ^r	13,382	39,711	127,931	10,670	191,694	2017 YTD	46,414
2016 YTD ^r	5,829	30,703	106,716	9,141	152,389	2016 YTD	43,295
2017 YTD as % of 2016 YTD	230	129	120	117	126	% change YTD	107
Last 4 weeks as % of 2016 ²	317	139	160	171	158	Last 4wks % 2016	108
Last 4 weeks as % of 4-year avg. ²	158	103	214	111	169	Last 4wks % 4 yr	131
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.

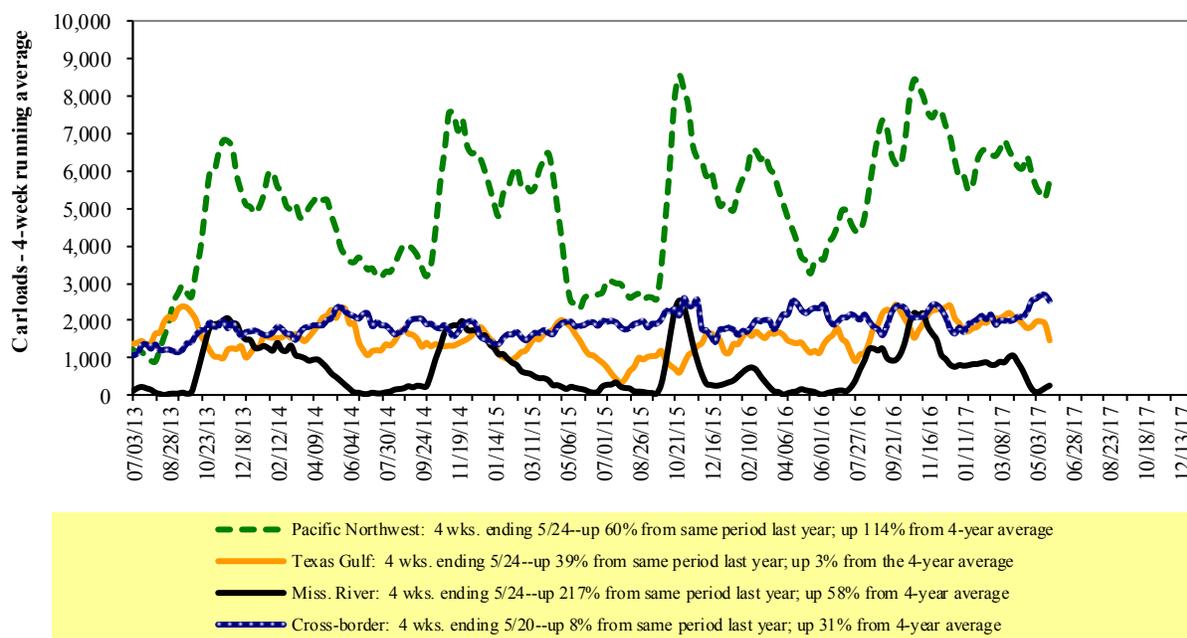
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

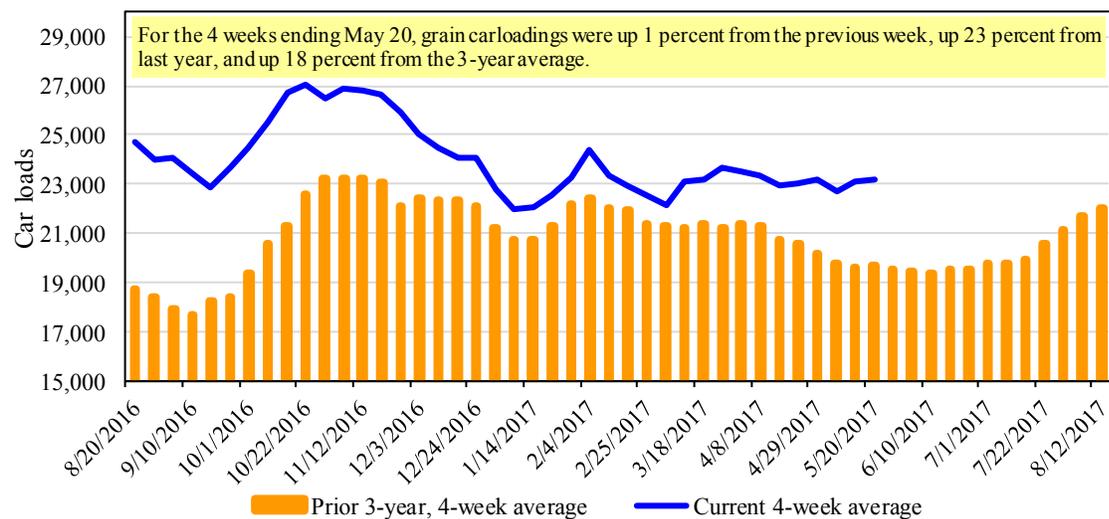
For the week ending: 5/20/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,536	2,932	13,033	892	5,604	23,997	3,995	4,728
This week last year	1,814	2,890	8,874	801	4,903	19,282	2,865	4,322
2017 YTD	36,507	55,710	229,777	19,460	121,771	463,225	79,517	86,995
2016 YTD	37,315	54,856	202,524	17,664	104,924	417,283	66,632	84,883
2017 YTD as % of 2016 YTD	98	102	113	110	116	111	119	102
Last 4 weeks as % of 2016*	89	98	150	103	107	123	130	114
Last 4 weeks as % of 3-yr avg**	85	90	141	101	110	118	95	94
Total 2016	95,179	151,006	590,779	45,246	300,836	1,183,046	193,959	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: 5/25/2017		Delivery period							
		Jun-17	Jun-16	Jul-17	Jul-16	Aug-17	Aug-16	Sep-17	Sep-16
BNSF ³	COT grain units	no bids	0	no bids	0	no bids	0	no bids	0
	COT grain single-car ⁵	0	0	no offer	0	0	0	0	0
UP ⁴	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	no bids	no offer	no offer	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.

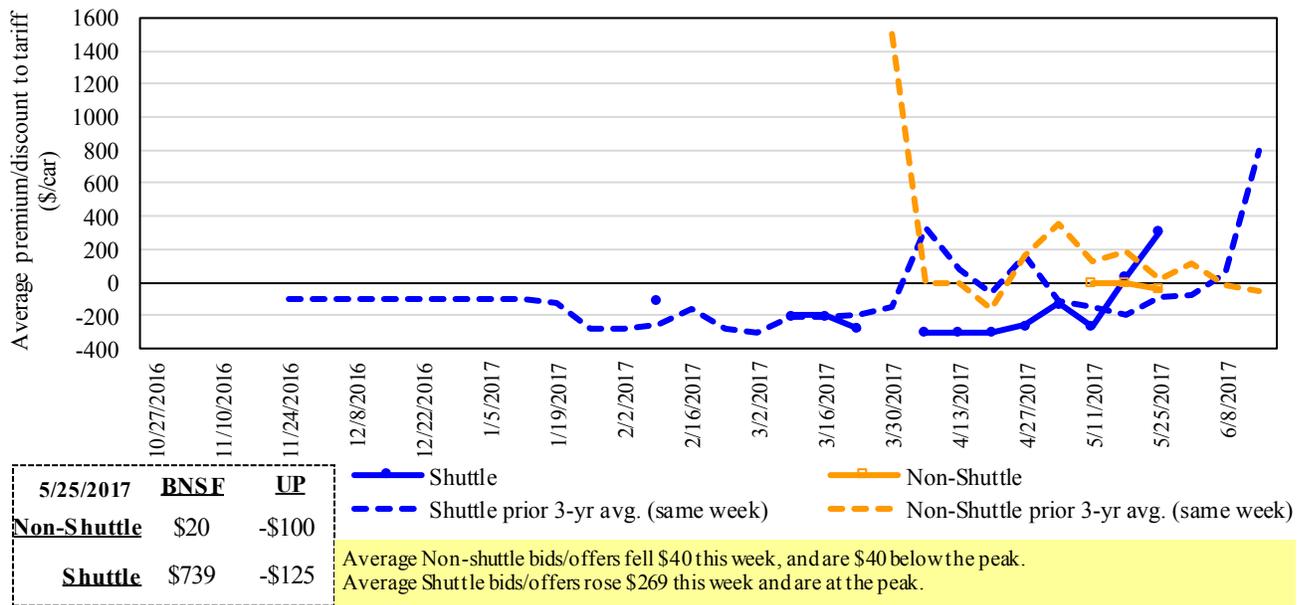
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

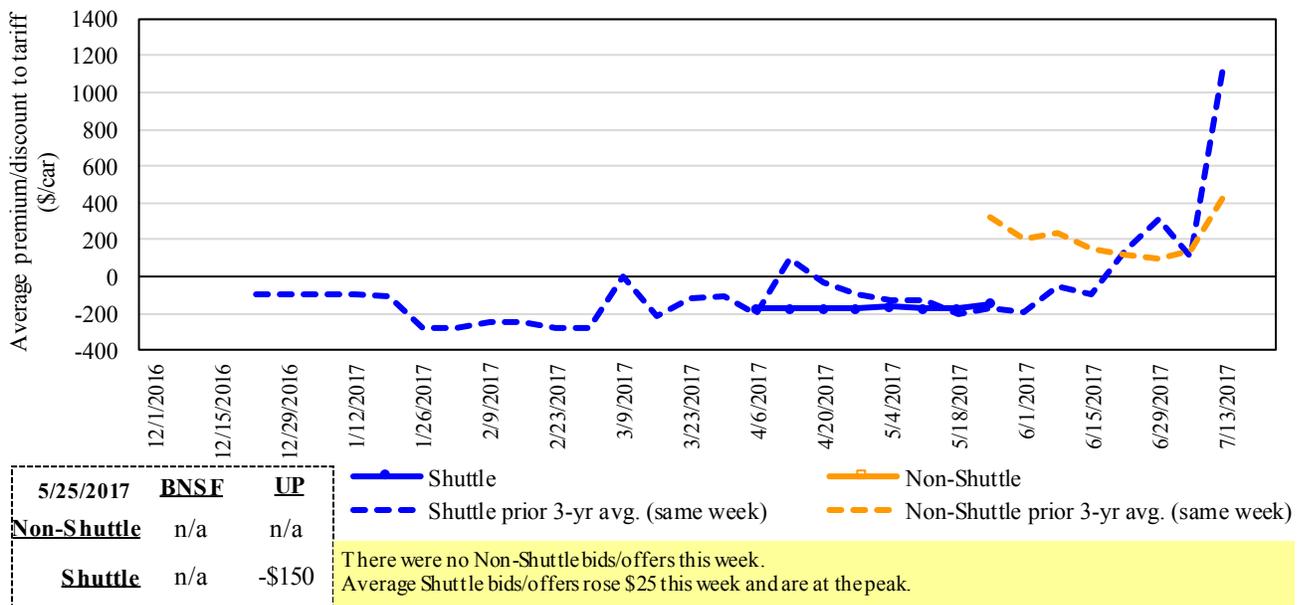
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



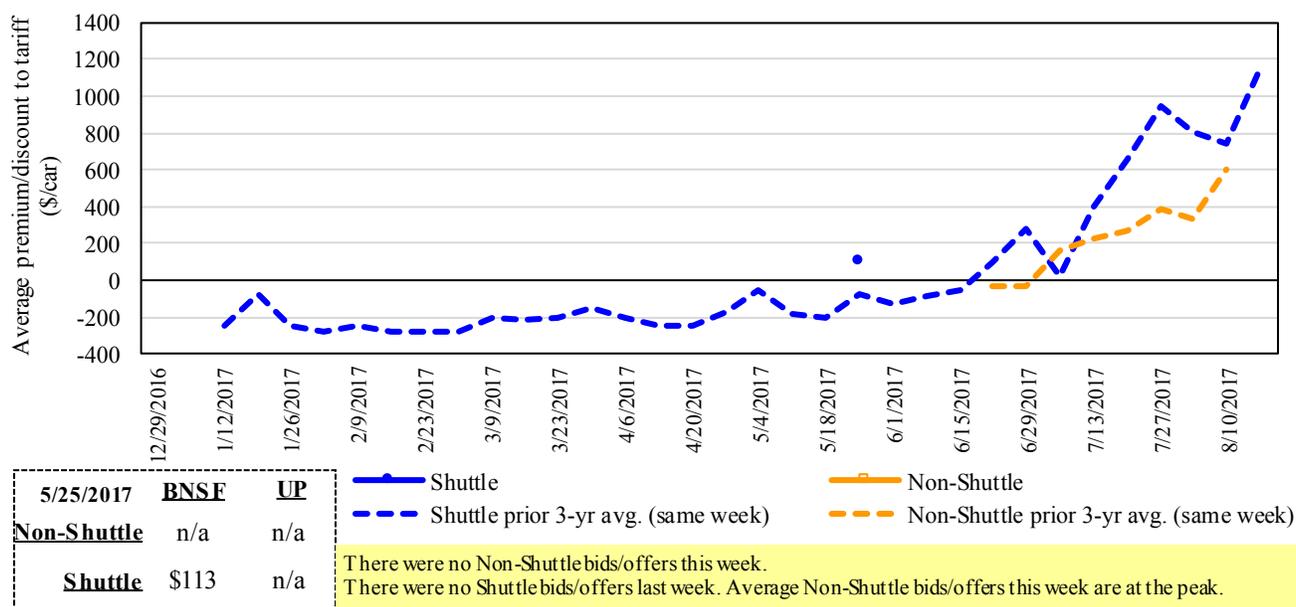
Non-shuttle bids include unit-train and single-car bids. n/a = not available.
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5
Bids/Offers for Railcars to be Delivered in July 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 August 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					
		5/25/2017	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17
Non-shuttle	BNSF-GF	20	n/a	n/a	n/a	n/a	n/a
	Change from last week	20	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(100)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(100)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	739	n/a	113	169	n/a	n/a
	Change from last week	439	n/a	n/a	69	n/a	n/a
	Change from same week 2016	839	n/a	n/a	(531)	n/a	n/a
	UP-Pool	(125)	(150)	n/a	n/a	650	n/a
	Change from last week	100	25	n/a	n/a	0	n/a
	Change from same week 2016	0	(50)	n/a	n/a	200	n/a

¹ Average 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

June, 2017	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	\$51	\$39.06	\$1.06	9	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	20	
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1	
	Wichita, KS	New Orleans, LA	\$4,540	\$89	\$45.97	\$1.25	9	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$98	\$48.79	\$1.33	9	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$136	\$51.21	\$1.39	9	
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	\$74	\$36.83	\$1.00	0	
	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	\$0	\$39.26	\$1.07	3	
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	8	
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	0	
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	2	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	2	
	Northwest KS	Portland, OR	\$5,812	\$160	\$59.30	\$1.61	9	
Corn	Minneapolis, MN	Portland, OR	\$5,000	\$0	\$49.65	\$1.26	0	
	Sioux Falls, SD	Tacoma, WA	\$4,960	\$0	\$49.26	\$1.25	0	
	Champaign-Urbana, IL	New Orleans, LA	\$3,481	\$101	\$35.57	\$0.90	3	
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	3	
	Des Moines, IA	Amarillo, TX	\$3,895	\$79	\$39.46	\$1.00	5	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
	Council Bluffs, IA	Stockton, CA	\$4,740	\$0	\$47.07	\$1.20	2	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	2
		Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	3
		Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	2
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 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

Sources: www.bnsf.com, www.cn.ca, www.csx.com, www.up.com

Table 8

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

Commodity	Origin		Tariff rate/car ¹	Fuel surcharge		Tariff plus surcharge per:		Percent change ⁴ Y/Y
	state	Destination region		per car ²	metric ton ³	bushel ³		
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0	
	OK	Cuautitlan, EM	\$6,631	\$70	\$68.46	\$1.86	3	
	KS	Guadalajara, JA	\$7,309	\$261	\$77.35	\$2.10	7	
	TX	Salinas Victoria, NL	\$4,292	\$43	\$44.29	\$1.20	5	
Corn	IA	Guadalajara, JA	\$8,187	\$212	\$85.82	\$2.18	3	
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	1	
	NE	Queretaro, QA	\$7,909	\$145	\$82.30	\$2.09	2	
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1	
	MO	Tlalnepantla, EM	\$7,268	\$142	\$75.71	\$1.92	2	
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	1	
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$223	\$90.63	\$2.46	2	
	NE	Guadalajara, JA	\$8,942	\$227	\$93.68	\$2.55	0	
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5	
	KS	Torreon, CU	\$7,489	\$152	\$78.07	\$2.12	2	
Sorghum	NE	Celaya, GJ	\$7,164	\$190	\$75.14	\$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	\$140	\$68.94	\$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.

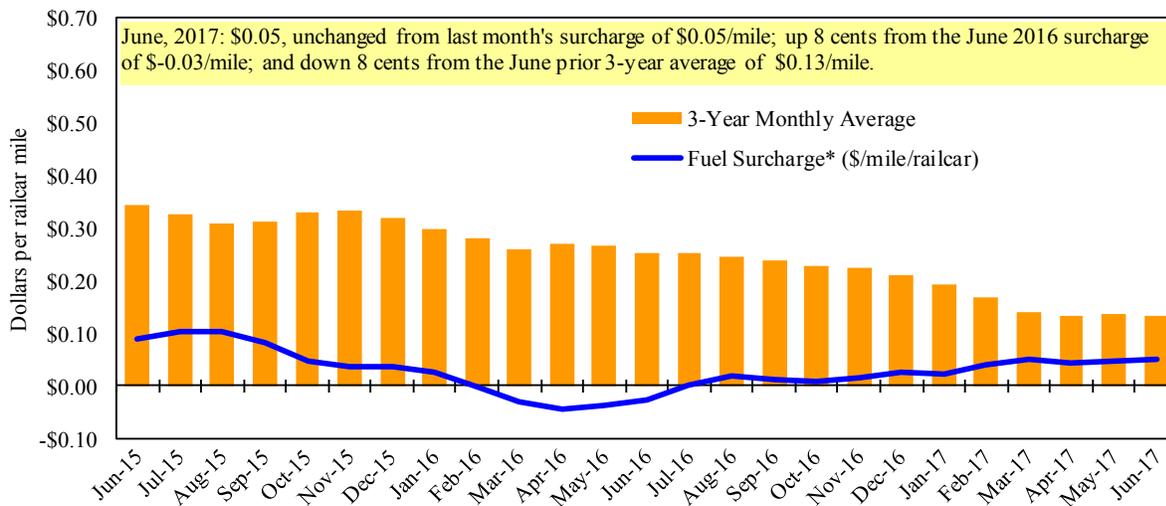
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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.

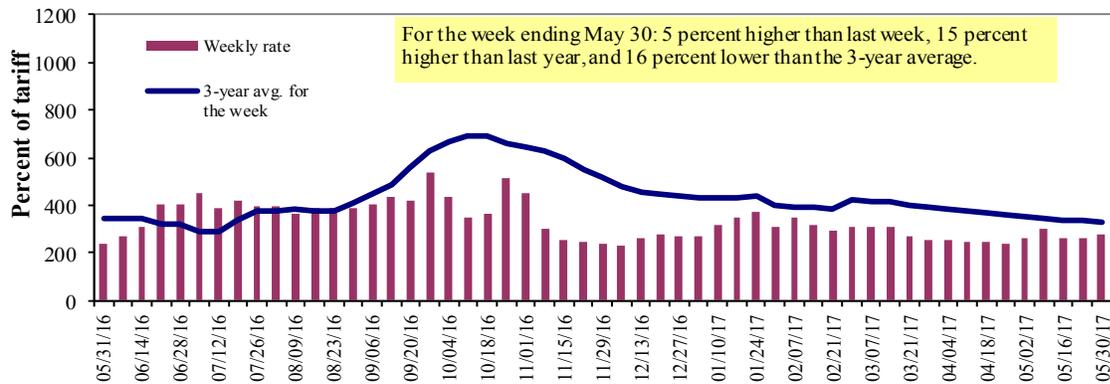
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	5/30/2017	333	288	278	200	213	213	173
	5/23/2017	323	270	263	180	207	207	167
\$/ton	5/30/2017	20.61	15.32	12.90	7.98	9.99	8.61	5.43
	5/23/2017	19.99	14.36	12.20	7.18	9.71	8.36	5.24
Current week % change from the same week:								
	Last year	5	14	15	15	28	28	2
	3-year avg. ²	-17	-15	-16	-11	-1	-1	-14
Rate¹	July	333	280	273	193	213	213	175
	September	415	368	368	303	375	375	280

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:

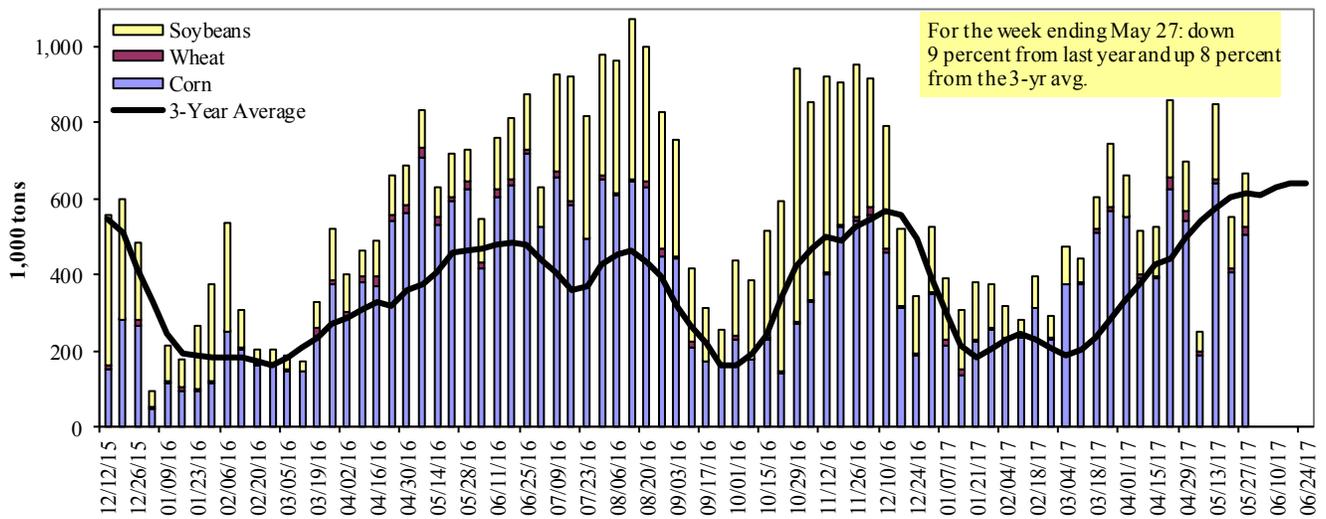
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$$

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 5/27/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	298	31	91	3	424
Winfield, MO (L25)	437	27	94	10	567
Alton, IL (L26)	514	26	135	10	684
Granite City, IL (L27)	504	25	139	10	678
Illinois River (L8)	117	22	63	0	201
Ohio River (L52)	50	4	55	0	108
Arkansas River (L1)	0	0	0	0	0
Weekly total - 2017	554	29	194	10	785
Weekly total - 2016	669	42	131	0	841
2017 YTD ¹	9,989	858	4,989	146	15,983
2016 YTD	9,213	727	4,268	119	14,327
2017 as % of 2016 YTD	108	118	117	123	112
Last 4 weeks as % of 2016 ²	71	59	128	19	78
Total 2016	24,136	2,030	16,668	344	43,178

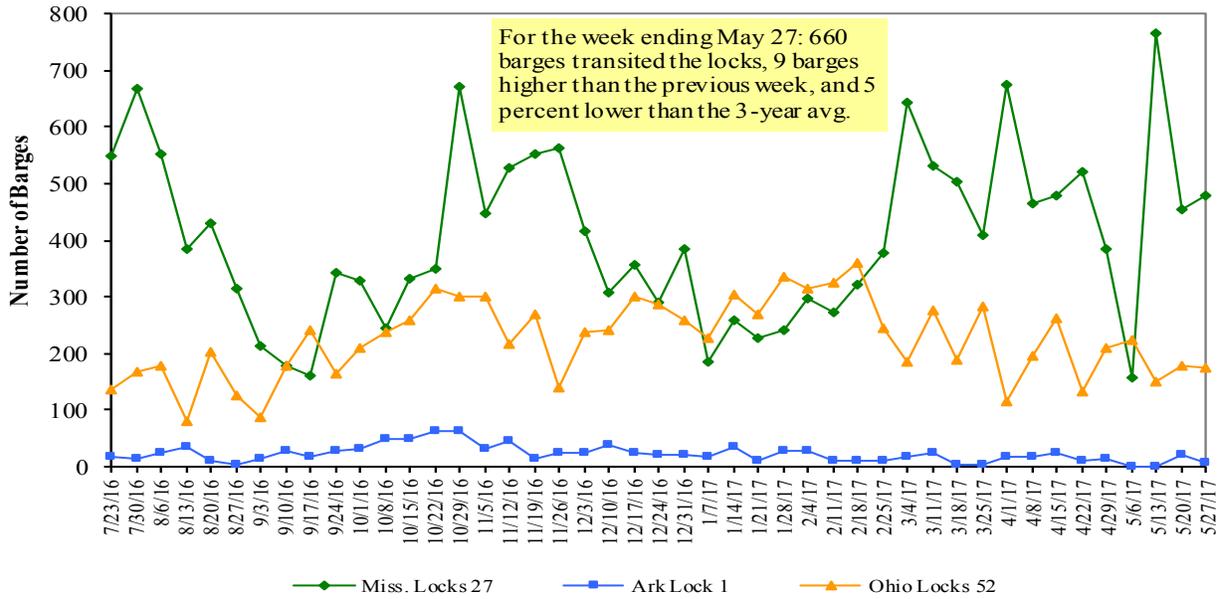
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

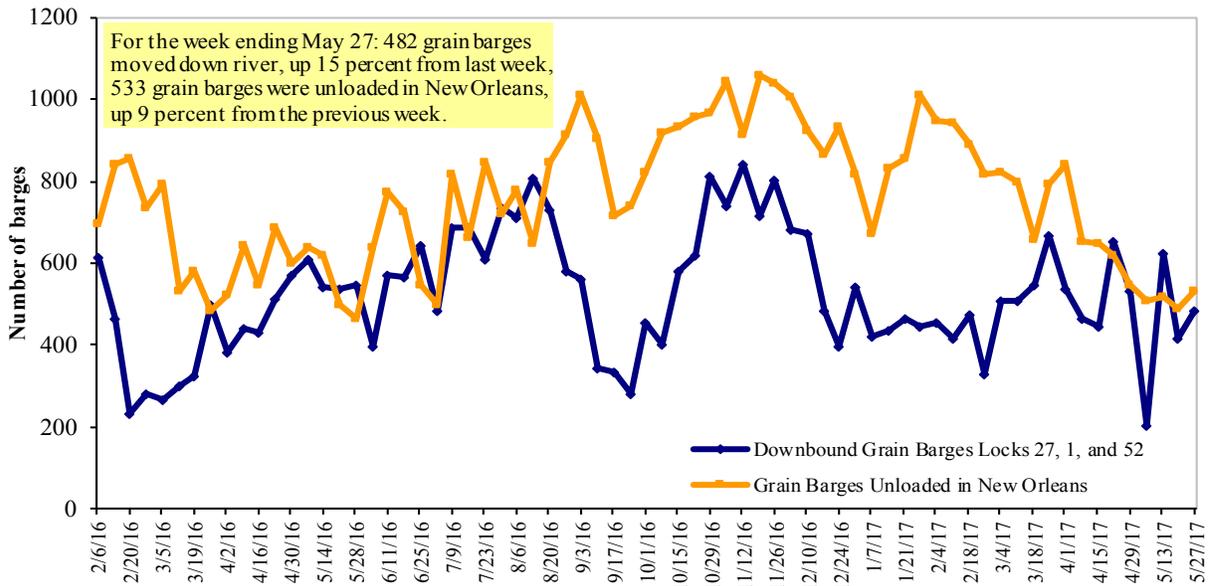
Source: U.S. Army Corps of Engineers

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 5/29/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.608	0.020	0.203
	New England	2.622	-0.004	0.180
	Central Atlantic	2.751	0.018	0.246
	Lower Atlantic	2.505	0.026	0.183
II	Midwest ²	2.512	0.044	0.170
III	Gulf Coast ³	2.423	0.039	0.169
IV	Rocky Mountain	2.661	0.032	0.286
V	West Coast	2.843	0.015	0.193
	West Coast less California	2.735	0.010	0.170
	California	2.931	0.019	0.213
Total	U.S.	2.571	0.032	0.189

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									
5/18/2017	999	306	853	699	83	2,940	12,724	7,018	22,682
This week year ago	573	158	700	425	44	1,899	13,794	4,596	20,288
Cumulative exports-marketing year²									
2016/17 YTD	10,923	2,241	7,718	4,134	442	25,458	40,532	50,810	116,800
2015/16 YTD	5,409	3,051	6,201	3,422	658	18,740	28,022	42,790	89,553
YTD 2016/17 as % of 2015/16	202	73	124	121	67	136	145	119	130
Last 4 wks as % of same period 2015/16	241	174	151	208	260	195	99	150	120
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 5/18/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2017/18 Next MY	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -				- 1,000 mt -
Mexico	1,312	12,663	11,843	7	11,204
Japan	546	10,582	8,924	19	11,284
Korea	0	5,589	1,926	190	3,931
Colombia	0	3,966	4,322	(8)	4,134
Peru	28	2,779	1,866	49	2,109
Top 5 Importers	1,886	35,579	28,881	23	32,662
Total US corn export sales	2,473	53,256	41,816	27	46,633
% of Projected	5%		87%		
Change from prior week ²	1	457	1,381		
Top 5 importers' share of U.S. corn export sales	76%	67%	69%		70%
USDA forecast, May 2017	47,710	56,616	48,295	17	
Corn Use for Ethanol USDA forecast, May 2017	139,700	138,430	132,690	5	

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/esrquery/. Total commitments change (net sales) from prior week could include revisions from previous
week's outstanding sales or accumulated sales.

³FAS 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 5/18/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2017/18	2016/17	2015/16		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	1,042	36,059	27,323	32	29,033
Mexico	229	3,455	3,163	9	3,295
Indonesia	2	1,928	1,647	17	2,065
Japan	186	2,032	2,084	(2)	1,994
Netherlands	0	1,553	1,353	15	1,644
Top 5 importers	1,459	45,027	35,570	27	38,032
Total US soybean export sales	2,885	57,828	47,386	22	48,389
% of Projected	5%	104%	90%		
Change from prior week ²	6	473	457		
Top 5 importers' share of U.S. soybean export sales	51%	78%	75%		79%
USDA forecast, May 2017	58,583	55,858	52,752	6	

(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/esrquery/. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 5/18/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg 2013-2015
	2017/18	2016/17	2015/16		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	257	2,831	2,519	12	2,743
Mexico	518	3,334	2,394	39	2,660
Philippines	492	2,687	2,164	24	2,156
Brazil	0	1,215	507	140	2,076
Nigeria	90	1,632	1,518	8	1,978
Korea	350	1,398	1,139	23	1,170
China	223	1,583	878	80	1,770
Taiwan	101	1,097	1,087	1	1,005
Indonesia	0	1,204	545	121	776
Colombia	30	858	672	28	679
Top 10 importers	2,059	17,838	13,424	33	17,013
Total US wheat export sales	3,454	28,398	20,639	38	24,485
% of Projected		101%	98%		
Change from prior week ²	343	202	(10)		
Top 10 importers' share of U.S. wheat export sales	60%	63%	65%		69%
USDA forecast, May 2017	27,248	28,202	21,117	34	

(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/esrquery/. Total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

Grain Inspections for Export by U.S. Port Region (1,000 metric tons)

Port Regions	For the Week Ending 05/25/17	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	350	326	108	6,226	4,874	128	148	157	12,325
Corn	472	370	128	6,545	3,533	185	173	197	12,009
Soybeans	71	85	83	4,159	4,425	94	1959	2344	14,447
Total	893	780	115	16,930	12,832	132	171	186	38,782
Mississippi Gulf									
Wheat	145	112	129	2,038	1,455	140	181	150	3,480
Corn	540	620	87	15,179	11,771	129	88	79	31,420
Soybeans	160	158	101	10,785	9,291	116	165	143	35,278
Total	845	891	95	28,003	22,517	124	105	93	70,178
Texas Gulf									
Wheat	71	210	34	2,832	1,158	245	197	130	6,019
Corn	0	0	n/a	347	377	92	47	57	1,669
Soybeans	0	0	n/a	0	92	0	n/a	0	1,105
Total	71	210	34	3,179	1,627	195	169	122	8,792
Interior									
Wheat	25	38	66	719	508	141	144	129	1,543
Corn	155	150	103	3,125	2,754	113	118	135	7,197
Soybeans	99	90	110	2,057	1,600	129	192	178	4,577
Total	279	278	100	5,901	4,862	121	137	145	13,317
Great Lakes									
Wheat	44	23	190	209	161	130	137	126	1,186
Corn	0	0	n/a	45	64	70	104	123	584
Soybeans	15	29	52	97	23	416	190	150	910
Total	59	52	113	350	249	141	136	129	2,681
Atlantic									
Wheat	0	0	n/a	37	182	20	0	0	315
Corn	0	0	n/a	5	14	38	n/a	0	294
Soybeans	8	10	79	877	850	103	238	200	2,269
Total	8	10	79	919	1,045	88	106	70	2,878
U.S. total from ports²									
Wheat	635	709	90	12,061	8,338	145	157	144	24,867
Corn	1,168	1,140	102	25,246	18,512	136	110	107	53,173
Soybeans	353	372	95	17,975	16,281	110	207	182	58,587
Total	2,156	2,221	97	55,282	43,132	128	132	126	136,627

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

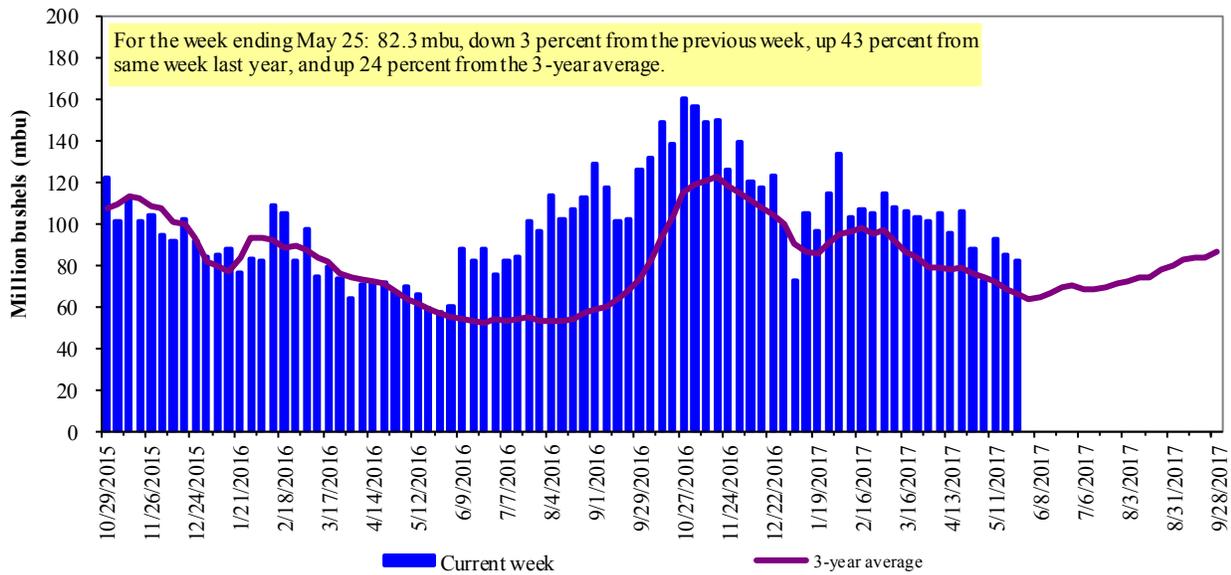
Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); YTD= year-to-date; n/a = not applicable

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)

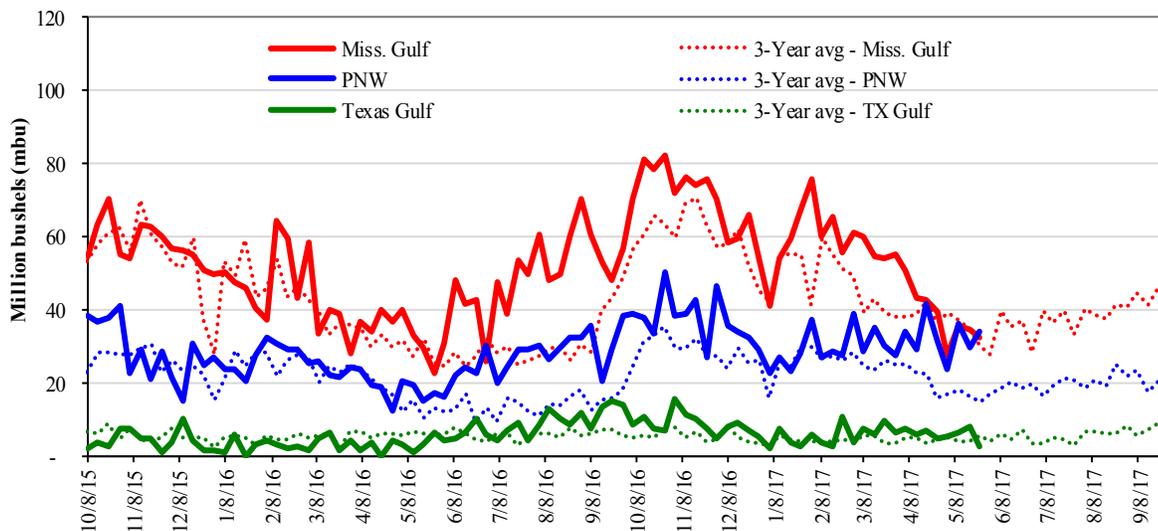


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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)



<u>Week ending 05/25/17 inspections (mbu):</u>	<u>Percent change from:</u>	<u>MS Gulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Mississippi Gulf: 32.5	Last Week:	down 5	down 66	down 17	up 15
PNW: 34.1	Last Year (same week):	up 42	down 59	up 20	up 100
Texas Gulf: 2.6	3-yr avg (4-wk. mov. Avg):	down 8	down 42	down 11	up 107

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

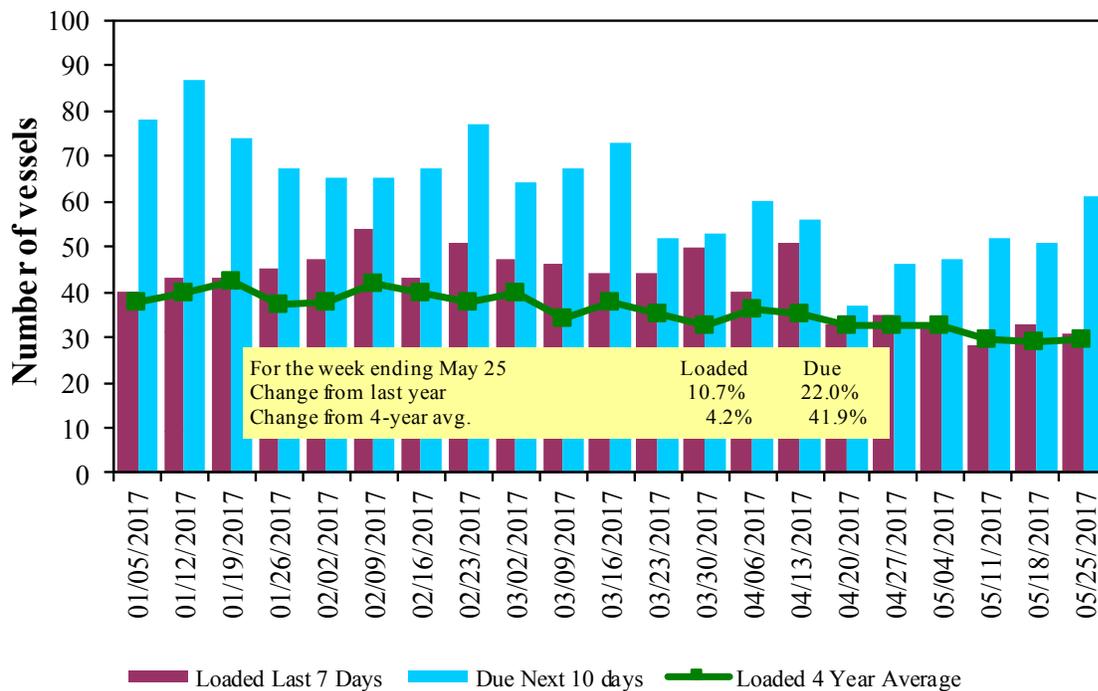
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
5/25/2017	39	31	61	23	n/a
5/18/2017	30	33	51	26	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

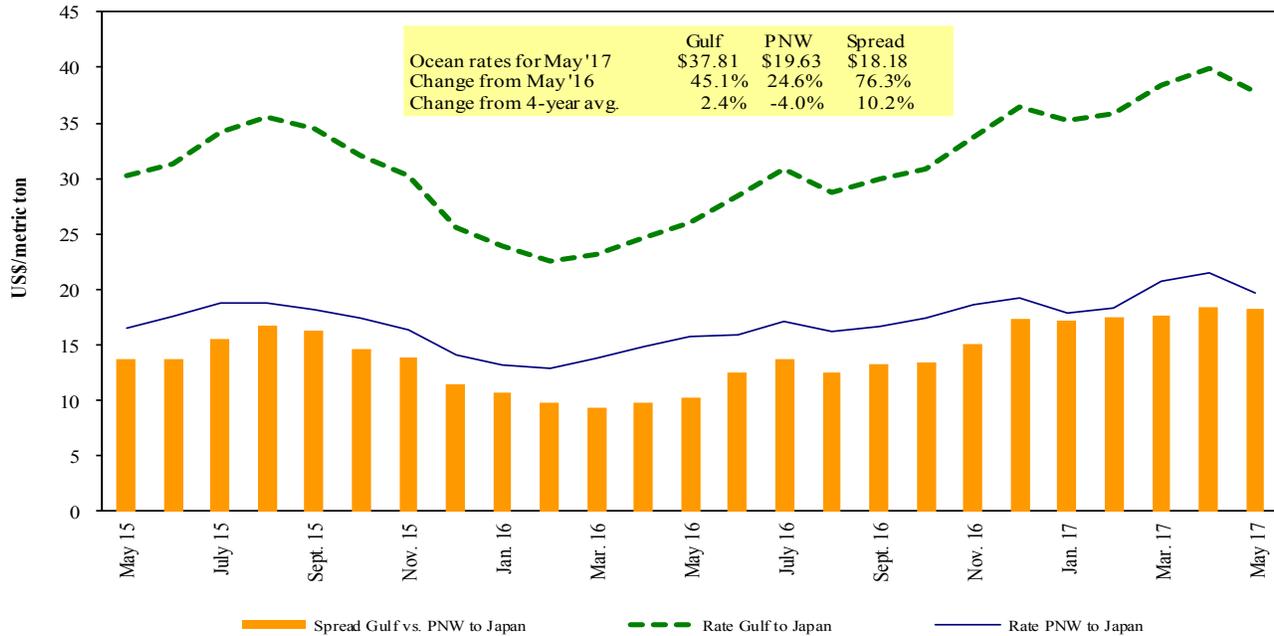
U.S. Gulf Vessel Loading Activity



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 05/27/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Algeria	Heavy Grain	Jun 1/10	60,000	21.00
U.S. Gulf	Cote d'Ivoire	Rice	Jun 19/29	6,000	93.33*
U.S. Gulf	Ghana	Rice	Jun 9/19	6,000	341.67*
U.S. Gulf	Ghana	Soybean Meal	Jun 9/19	5,000	86.75*
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	Jun 20/30	60,000	24.00
Brazil	China	Heavy Grain	May 20/30	60,000	25.50
Brazil	China	Heavy Grain	May 20/30	60,000	26.50
Brazil	China	Heavy Grain	May 5/15	60,000	29.25
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	May 1/5	60,000	23.50
EC S. America	China	Heavy Grain	May 20/30	60,000	29.75
River Plate	China	Heavy Grain	May 10/20	63,000	35.50
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*

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

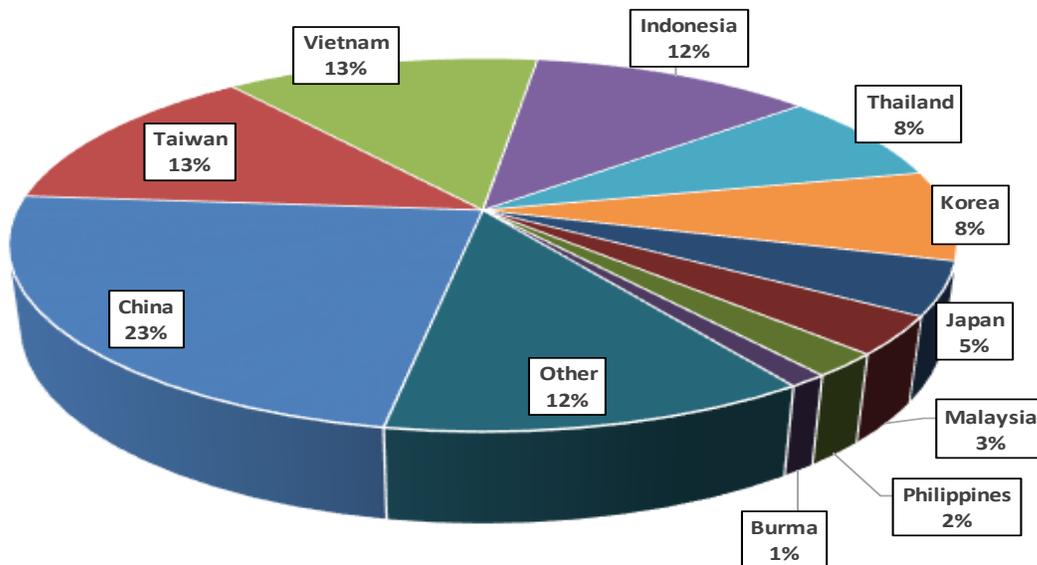
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

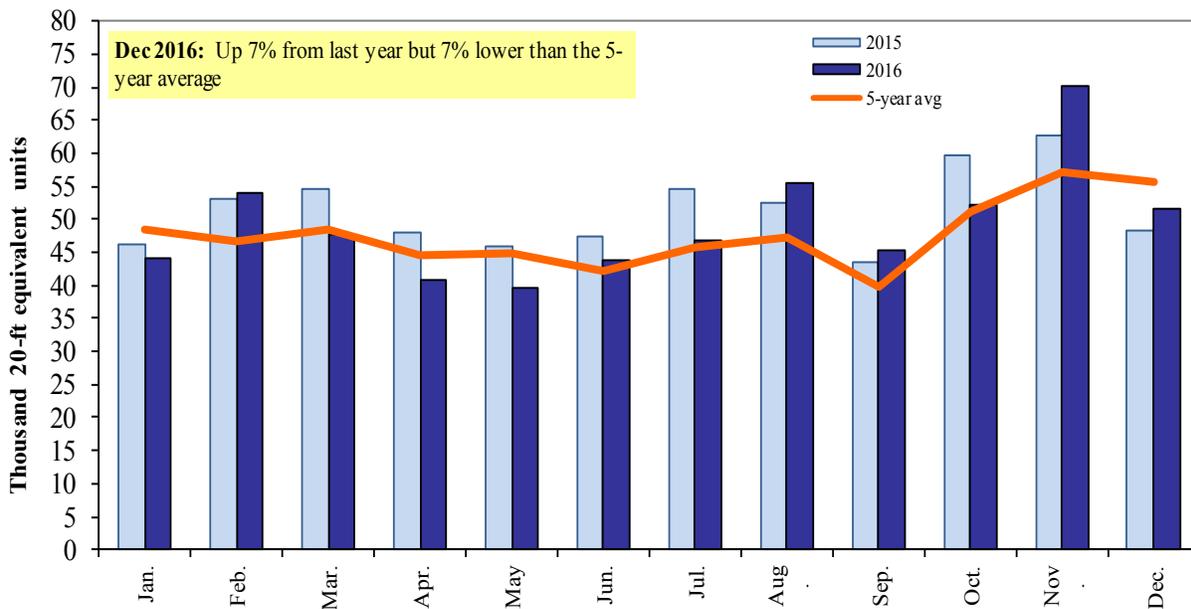


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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