



Grain Transportation Report

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WEEKLY HIGHLIGHTS

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Bulk Ocean Freight Rates Remain Fairly Stable

Despite bullish market sentiments by vessel owners, ocean freight rates for shipping bulk commodities—including grains—have remained relatively stable, since the beginning of the year. Rates have been fluctuating within a two dollar range. As of June 14, the rate for shipping grain, from the U.S. Gulf to Japan, was \$44 per metric ton (mt), 2 percent more than the beginning of the year. The rate from the Pacific Northwest (PNW) to Japan was \$25 per mt, 4 percent more than the beginning of the year. As of January 4, the Gulf-to-Japan rate was \$43 per mt; and the PNW-to-Japan rate was \$24 per mt. So far, the demand for bulk vessels has not caught up with the supply.

Corn and Soybeans Push Grain Inspections Higher

For the week ending June 14, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 2.9 million metric tons (mmt); up 15 percent from the previous week, up 27 percent from last year, and 53 percent above the 3-year average. Increased inspections were helped by a 18 percent increase in corn inspections and a 27 percent jump in soybean inspections. Pacific Northwest (PNW) grain inspections increased 19 percent from the past week, as demand from Asia increased, and Mississippi Gulf inspections increased 21 percent; due primarily to increased shipments to Europe, Africa, and Asia. Outstanding export sales are down for corn, wheat, and soybeans.

Weekly Upper Mississippi River Corn Barge Movements Near 9-year High

For the week ending June 16, downbound corn barge shipments through Mississippi River Locks 27 (located near St. Louis, MO) totaled 745 thousand tons, the highest weekly volume for Locks 27 since the week ending August 1, 2009. This reflects an increased demand for corn barge shipments, as well as the much improved navigation conditions on the Upper Mississippi River, during the first half of June. However, high water conditions have returned to northern portion of the Upper Mississippi River (St. Paul, MN to Rock Island, IL) and will likely result in some disruptions of barge traffic. Elsewhere on the inland waterways, disruptions on the Ohio River are expected to occur as recurrent operational difficulties at Locks and Dam 52 (Brookport, IL) may halt traffic for several days, starting on or about June 23. Locks and Dam 52 will be replaced with Olmsted Locks and Dam that is scheduled to be operational in the second half of 2018.

Snapshots by Sector

Export Sales

For the week ending June 7, **unshipped balances** of wheat, corn, and soybeans totaled 29 mmt, up 22 percent from the same time last year. Net weekly **wheat export sales** were .302 mmt, up significantly from the previous week. Net **corn export sales** were .936 mmt, up 12 percent from the previous week. Net **soybean export sales** were .520 mmt, up 215 percent from the previous week.

Rail

U.S. Class I railroads originated 23,347 **grain carloads** for the week ending June 9, up 4 percent from the previous week and last year, and up 15 percent from the 3-year average.

Average June shuttle **secondary railcar** bids/offers per car were \$363 above tariff for the week ending June 14, up \$200 from last week. There were no shuttle bids/offers this week last year and no non-shuttle bids/offers this week.

Barge

For the week ending June 16, **barge grain movements** totaled 1,191,930 tons, 18 percent higher than the previous week and up 110 percent from the same period last year.

For the week ending June 16, 759 grain barges **moved down river**, 110 barges more than the previous week. There were 615 grain barges **unloaded in New Orleans**, 27 percent lower than the previous week.

Ocean

For the week ending June 14, 30 **ocean-going grain vessels** were loaded in the Gulf, 17 percent less than the same period last year. Forty-seven vessels are expected to be loaded within the next 10 days, 13 percent less than the same period last year.

For the week ending June 14, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was \$44.00 per metric ton, 2 percent more than the previous week. The cost of shipping, from the PNW to Japan, was \$25.00 per metric ton, 2 percent more than the previous week.

Fuel

For the week ending June 18, the U.S. average **diesel fuel price** decreased 2 cents from the previous week, to \$3.24 per gallon, 76 cents higher than the same week last year.

Feature Article/Calendar

Agricultural Transportation Infrastructure Investment Workshops

Introduction

Throughout fiscal year 2018, USDA's Agricultural Marketing Service is collaborating with Washington State University (WSU) and Texas A&M Transportation Institute (TTI) and AgriLife Extension (AgriLife) to conduct research and hold workshops on methods for prioritizing transportation infrastructure investments that maintain the competitiveness of U.S. agricultural export supply chains. The workshops explore research findings and ways to strategically rank infrastructure needs for U.S. agricultural exports and improve producers' access to vital domestic and international markets. The WSU project examines the export supply chains for wheat, soybeans, broilers and tree nuts. The TTI project looks at export supply chains on the United States-Mexico border. This article provides more detail about the workshops led by these two Land-Grant Universities.

Outreach Efforts

USDA and its university collaborators are hosting the workshops in eight strategic locations to present preliminary results of the research and seek input from attendees, including agricultural stakeholders, local area policy makers, State DOTs, academic researchers, and transportation providers. The primary objective of the workshops is to help agricultural stakeholders, at all points along the supply chain, collectively improve market access through first-hand input with transportation infrastructure decision makers. Workshop topics included the importance of agricultural trade to the U.S. economy, a demonstration of current trends in U.S. agricultural and food trade, and the identification of commodity flows and supply chains for corn, sorghum, wheat, cotton, rice, broilers, tree nuts and fresh produce. Also covered, were the categorization of physical and administrative priorities for infrastructure planning, calculations of the impact of agricultural infrastructure projects, as well as open-forum discussions on the inputs calculated in the economic modelling employed to rank infrastructure projects beneficial for moving agricultural products to export markets.

Recent Delivery of Collaborative Results

On May 25, as part of the Freightweek STL Conference in St. Louis, MO, WSU presented preliminary findings from their research on the soybean export supply-chain. The supporting projects included a southern California railroad at the Los Angeles/Long Beach ports, the replacement of Merchants Bridge at St. Louis, MO, the double track rail expansion and new bridge construction at Sandpoint, ID, and the Olmstead Lock and Dam in the Ohio River. Some statistics presented at the event, related to infrastructure conditions and the value of agricultural supply-chains, were also [highlighted](#) by the American Journal of Transportation. WSU researchers presented the outcomes of a methodology developed to prioritize transportation infrastructure, for specific agricultural export supply-chains that span multiple geographic boundaries, jurisdictions and political landscapes; but not for promoting individual projects or picking winners and losers. The approach incorporated two effects of the infrastructure investment: (1) the regional economic impacts from construction activity, which were estimated using a "Computable General Equilibrium" model, developed by WSU, and (2) the impact to shippers related to improved capacity and cost savings. The outcomes revealed that the actual ranking of projects depends upon what criteria are most important and the weighting assigned to each.

During the workshop, WSU also introduced the [Freight DATA Warehouse \(FDW\)](#). FDW is an interactive website, hosted by WSU, that allows users access to historic data on shipping various commodities by a variety of modes, such as truck, rail, barge, and ocean freight. The data used to design the website were compiled from multiple sources including USDA, the U.S. Department of Transportation, the U.S. Department of Energy, the U.S. Army Corps of Engineers, and others.

At a workshop held on May 31, in Tucson, AZ, AgriLife presented current trends for agricultural export flows occurring across the U.S.-Mexico border. The presentation highlighted Arizona, California and Texas as important transportation hubs, and logistics points, for shipments of U.S. agricultural commodities to foreign markets. In 2016, 48 percent of fresh fruits and vegetable imports entered through Texas, 35 percent entered through Arizona, and 15

percent entered through California.¹ As of 2017, Mexico is the biggest importer of U.S. corn and rice and the second largest importer of U.S. fresh produce. Most corn exported to Mexico is transported by railroad through Texas, whereas most rice is transported via sea through Texas, and most fresh produce is exported by truck through Arizona. (See Table 1).

Table 1 Commodity Flows Across the U.S.-Mexico border in 2017

Commodity	Most Employed Mode of Transportation to Mexico	Mexico's rank as U.S. Importer	Most Frequent Exporting State
Corn	Rail (58%)	1 st	Texas
Rice	Sea (69%)	1 st	Texas
Fresh Produce	Truck (~99%)	2 nd	Arizona

Source: USDA, AMS and FAS; Texas A&M AgriLife Extension

During the workshop, TTI presented statistics related to Federal, State, and local infrastructure planning and included the breakdown of the budget suggested by the White House. Over the next 10 years, \$1.5 trillion will be invested in infrastructure, with \$200 billion allocated from Federal funds, and \$1.3 trillion coming from States, cities, counties, the private sector, and other sources.

TTI also presented the preliminary cost/benefit analysis of two projects in Arizona that impact grains and other agricultural products, such as fresh produce. The first project studied the improvement of SR189, also known as Mariposa Road, which is currently a five-lane undivided highway passing through 3-miles of urban roadways that link the U.S.-Mexico border with Interstate 19 in Nogales. This highway is congested, especially during the fresh produce peak season. The second project studied the expansion of U.S. 95, which is a federal highway that connects the second busiest border-crossing region of agricultural commodities in Yuma and San Luis—at southwestern Arizona—with California, Nevada, Oregon, Idaho and beyond, as it runs between international borders. The inputs in the modeling process included vehicle operating cost savings, business time and reliability cost savings, personal time and reliability cost savings, safety reduction value, shipper logistics productivity, and social and environmental value.

Upcoming Events

On July 25 and 26, the National Grain and Feed Association, Soy Transportation Coalition, and USDA, will host the 2018 Agricultural Transportation Summit: *Connecting Growing Supply with Growing Demand*, in Arlington, VA. During this summit, agricultural stakeholders will have an opportunity to interact with experts from the transportation industry, academia, USDA, U.S. Army Corps of Engineers, Surface Transportation Board, as well as government policymakers. These speakers will be discussing the importance of barge, rail, truck, and ocean vessel transportation to the competitiveness of U.S. agriculture.

On the afternoon of July 26, USDA will host an “Agricultural Transportation Infrastructure” workshop, which will present the overall research findings from WSU and TX A&M TTI/AgriLife Extension and input received from the eight customer-oriented workshops held this year. To register for the Agricultural Transportation Summit and/or the Agricultural Transportation Infrastructure workshop, please visit the official website:

<https://www.ngfa.org/upcoming-events/transportation-summit/>.

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¹ [Ribera, Luis A., Adcock, Flynn J., and C. Parr Rosson, III. U.S. Agricultural Supply Chains and Trade with Mexico.](#)

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
	Unit	Train	Shuttle		Gulf	Pacific
06/20/18	218	276	230	253	197	177
06/13/18	219	276	221	316	192	174

¹Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)

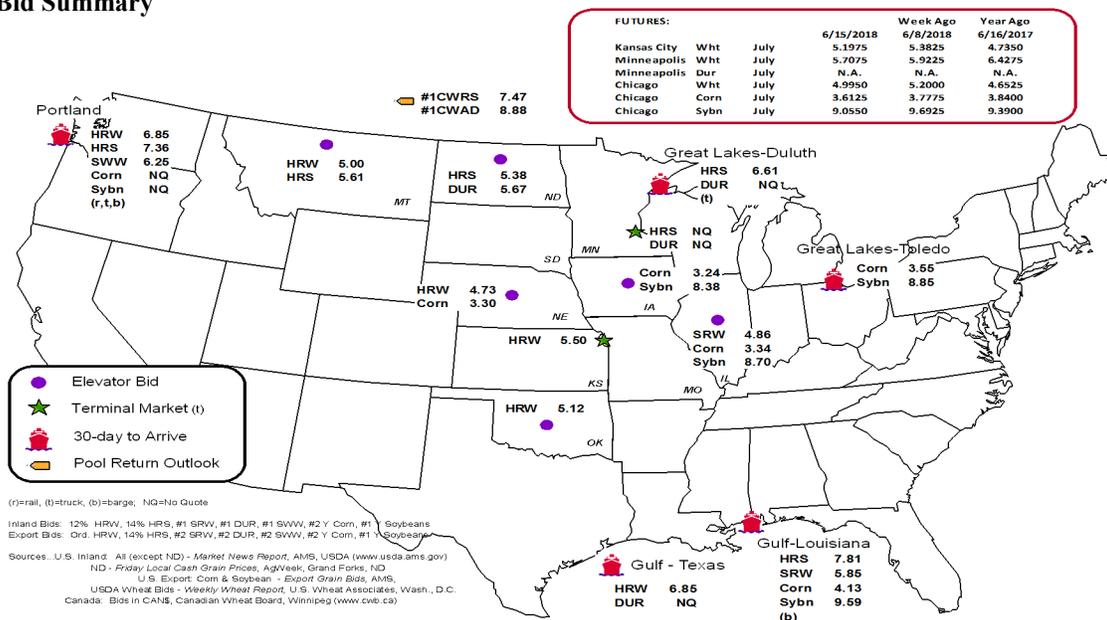
Commodity	Origin--Destination	6/15/2018	6/8/2018
Corn	IL--Gulf	-0.79	-0.84
Corn	NE--Gulf	-0.83	-0.88
Soybean	IA--Gulf	-1.21	-1.20
HRW	KS--Gulf	-1.35	-1.67
HRS	ND--Portland	-1.98	-2.11

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			
06/13/2018 ^p	236	465	6,628	304	7,633	6/9/2018	3,098
06/06/2018 ^r	443	116	7,149	298	8,006	6/2/2018	2,735
2018 YTD ^r	10,128	29,733	158,472	10,403	208,736	2018 YTD	52,248
2017 YTD ^r	14,324	45,430	146,621	11,062	217,437	2017 YTD	54,022
2018 YTD as % of 2017 YTD	71	65	108	94	96	% change YTD	97
Last 4 weeks as % of 2017 ²	148	22	109	196	96	Last 4wks % 2017	120
Last 4 weeks as % of 4-year avg. ²	378	24	167	193	136	Last 4wks % 4 yr	138
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.

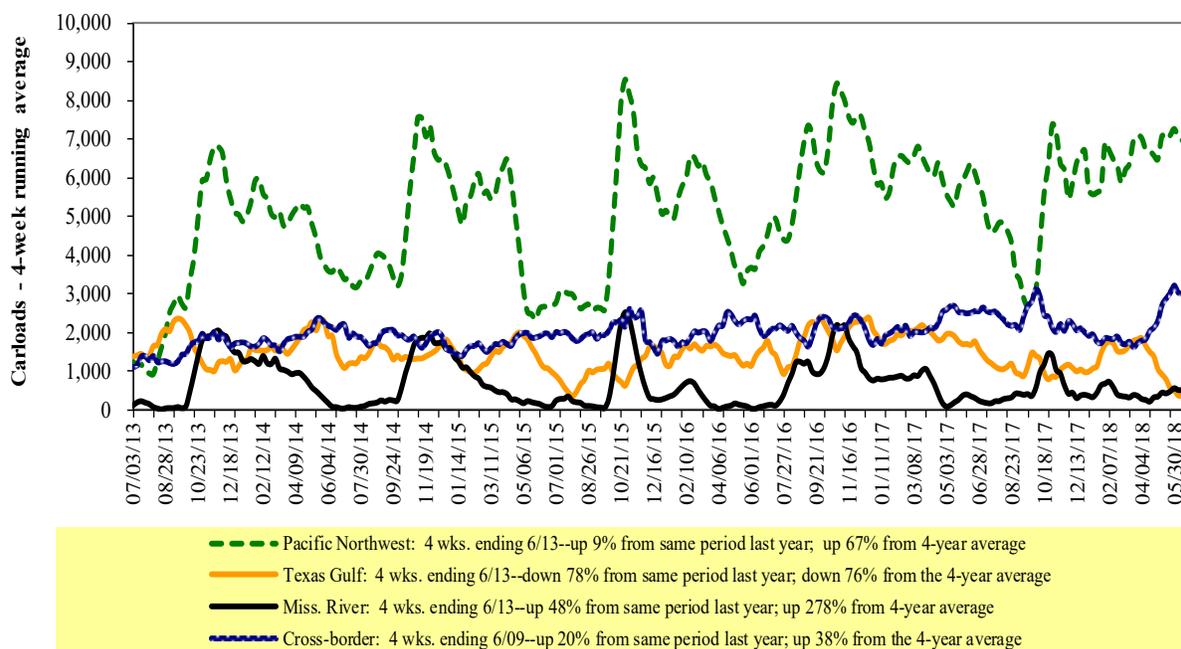
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

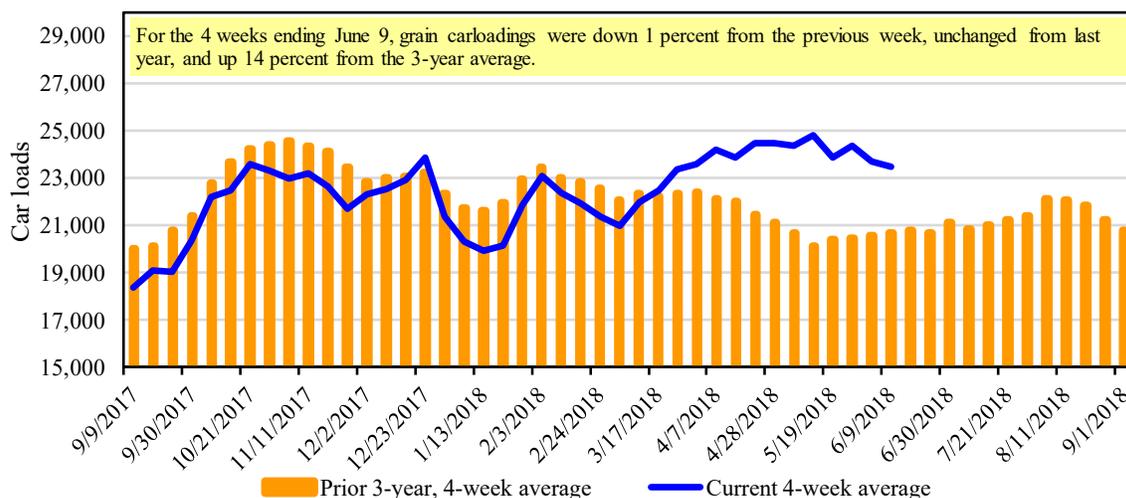
For the week ending: 6/9/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,916	2,602	13,127	821	4,881	23,347	3,666	5,184
This week last year	1,652	2,608	12,197	860	5,152	22,469	3,725	4,432
2018 YTD	44,773	57,313	286,242	21,821	121,146	531,295	86,543	105,665
2017 YTD	41,523	64,188	267,518	22,057	138,034	533,320	89,418	99,920
2018 YTD as % of 2017 YTD	108	89	107	99	88	100	97	106
Last 4 weeks as % of 2017*	119	91	101	113	95	100	111	113
Last 4 weeks as % of 3-yr avg.**	113	87	126	114	104	114	117	118
Total 2017	89,465	142,827	578,964	50,223	289,574	1,151,053	198,613	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: 6/14/2018		Delivery period							
		Jun-18	Jun-17	Jul-18	Jul-17	Aug-18	Aug-17	Sep-18	Sep-17
BNSF ³	COT grain units	no offer	n/a	1	0	no bids	0	no bids	no bids
	COT grain single-car ⁵	no offer	n/a	150	0	0	no bids	0	0
UP ⁴	GCAS/Region 1	no offer	n/a	no offer	no bids	no bids	no bids	n/a	no offer
	GCAS/Region 2	no offer	n/a	no offer	no bids	no bids	no bids	n/a	no offer

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.

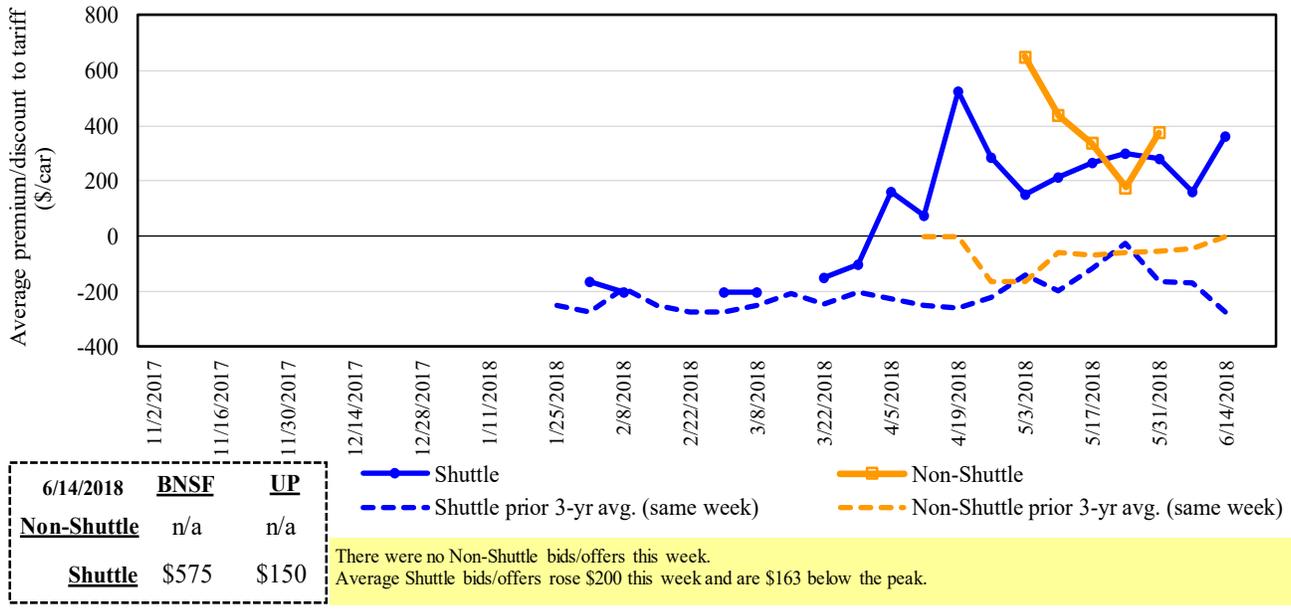
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

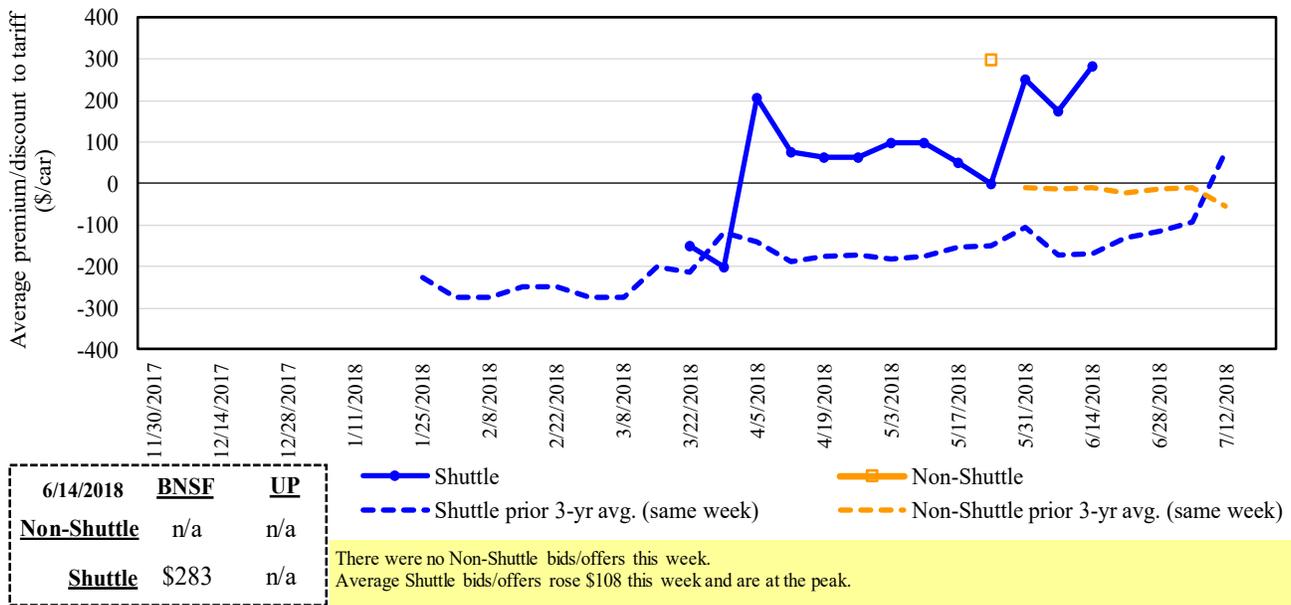
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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

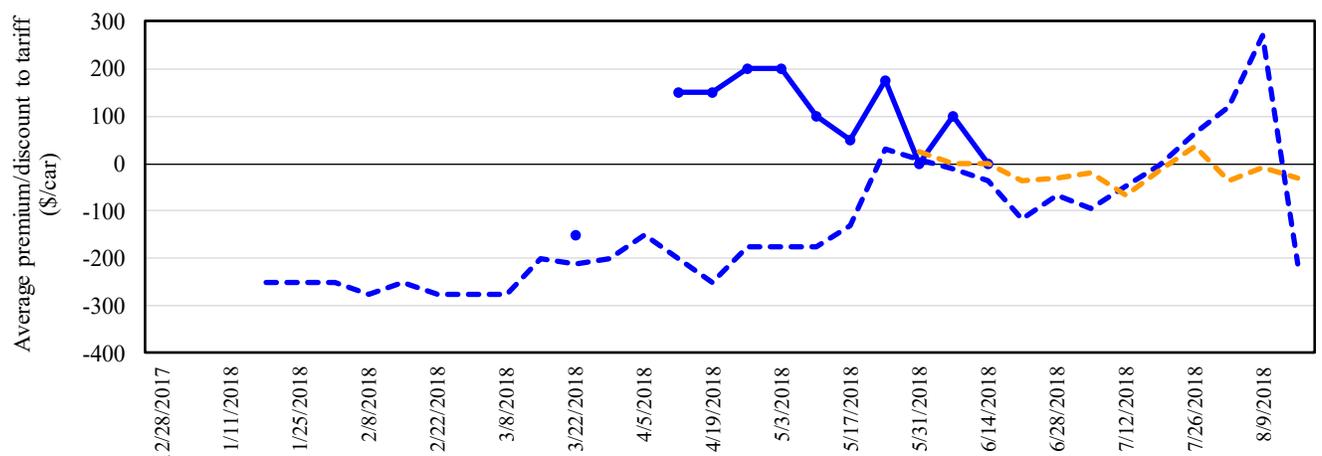
Figure 5
Bids/Offers for Railcars to be Delivered in July 2018, Secondary Market



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 August 2018, Secondary Market



6/14/2018	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	\$0

—●— Shuttle
- - - Shuttle prior 3-yr avg. (same week)
—■— Non-Shuttle
- - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers fell \$100 this week and are \$200 below the peak.

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: 6/14/2018		Delivery period					
		Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Non-shuttle	BNSF-GF	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2017	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	575	283	n/a	n/a	n/a	350
	Change from last week	275	(67)	n/a	n/a	n/a	0
	Change from same week 2017	n/a	358	n/a	n/a	n/a	n/a
	UP-Pool	150	n/a	0	50	850	n/a
	Change from last week	125	n/a	0	0	350	n/a
	Change from same week 2017	n/a	n/a	150	0	200	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

June, 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	\$101	\$39.57	\$1.08	1	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0	
	Wichita, KS	Los Angeles, CA	\$7,175	\$0	\$71.25	\$1.94	2	
	Wichita, KS	New Orleans, LA	\$4,540	\$178	\$46.85	\$1.28	2	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	0	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$195	\$49.76	\$1.35	2	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$271	\$52.56	\$1.43	3	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$201	\$41.03	\$1.04	9	
	Toledo, OH	Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5	
	Des Moines, IA	Davenport, IA	\$2,258	\$43	\$22.85	\$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	\$125	\$37.08	\$0.94	4	
	Des Moines, IA	Los Angeles, CA	\$5,327	\$365	\$56.52	\$1.44	6	
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$201	\$43.02	\$1.17	17	
	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	\$201	\$49.12	\$1.34	8	
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0	
	Wichita, KS	Galveston-Houston, TX	\$4,296	\$0	\$42.66	\$1.16	3	
	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	\$320	\$60.89	\$1.66	3	
	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	\$201	\$39.05	\$0.99	10	
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0	
	Des Moines, IA	Amarillo, TX	\$3,970	\$157	\$40.99	\$1.04	4	
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0	
	Council Bluffs, IA	Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2	
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
		Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0
		Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0
		Council Bluffs, IA	New Orleans, LA	\$4,775	\$232	\$49.72	\$1.35	8
Toledo, OH		Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3	
Grand Island, NE	Portland, OR	\$5,710	\$327	\$59.95	\$1.63	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: June, 2018			Fuel		Tariff plus surcharge per:		Percent
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	metric ton ³	bushel ³	change ⁴ Y/Y
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$139	\$69.17	\$1.88	1
	KS	Guadalajara, JA	\$7,309	\$338	\$78.13	\$2.12	1
	TX	Salinas Victoria, NL	\$4,292	\$85	\$44.72	\$1.22	1
Corn	IA	Guadalajara, JA	\$8,313	\$307	\$88.08	\$2.24	3
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$291	\$84.85	\$2.15	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$284	\$78.30	\$1.99	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$286	\$86.03	\$2.34	-5
	NE	Guadalajara, JA	\$8,692	\$312	\$92.00	\$2.50	-2
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$230	\$78.86	\$2.14	1
Sorghum	NE	Celaya, GJ	\$7,345	\$284	\$77.95	\$1.98	4
	KS	Queretaro, QA	\$7,819	\$174	\$81.67	\$2.07	4
	NE	Salinas Victoria, NL	\$6,452	\$140	\$67.35	\$1.71	5
	NE	Torreon, CU	\$6,790	\$221	\$71.63	\$1.82	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.

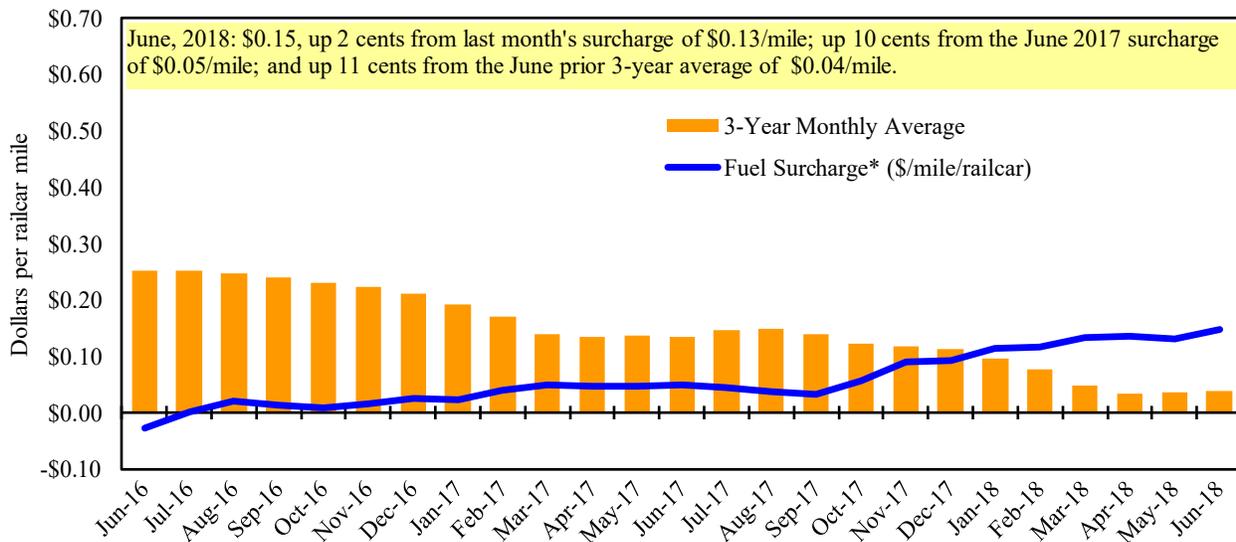
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V. railroad fuel surcharge policy as of 10/01/2009

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

¹Weighted by each Class I railroad's proportion of grain traffic for the prior year.

* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

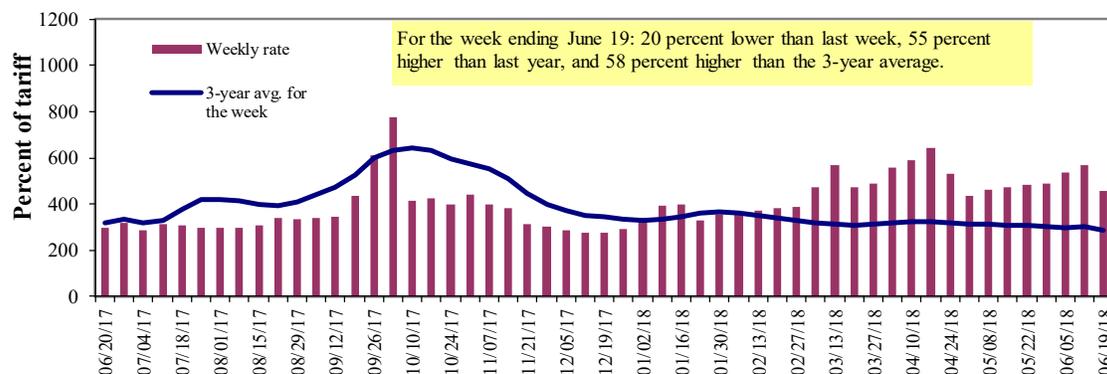
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	6/19/2018	526	474	456	350	370	395	306
	6/12/2018	593	573	568	424	410	410	368
\$/ton	6/19/2018	32.56	25.22	21.16	13.97	17.35	15.96	9.61
	6/12/2018	36.71	30.48	26.36	16.92	19.23	16.56	11.56
Current week % change from the same week:								
	Last year	54	68	55	77	90	103	73
	3-year avg. ²	35	41	58	49	60	71	51
Rate ¹	July	506	451	433	345	361	361	296
	September	556	534	519	443	499	499	431

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:
(Rate * 1976 tariff benchmark rate per ton)/100

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

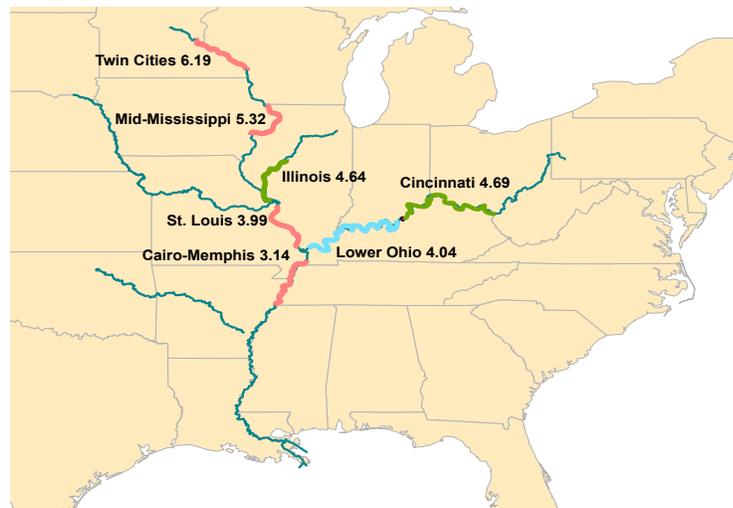
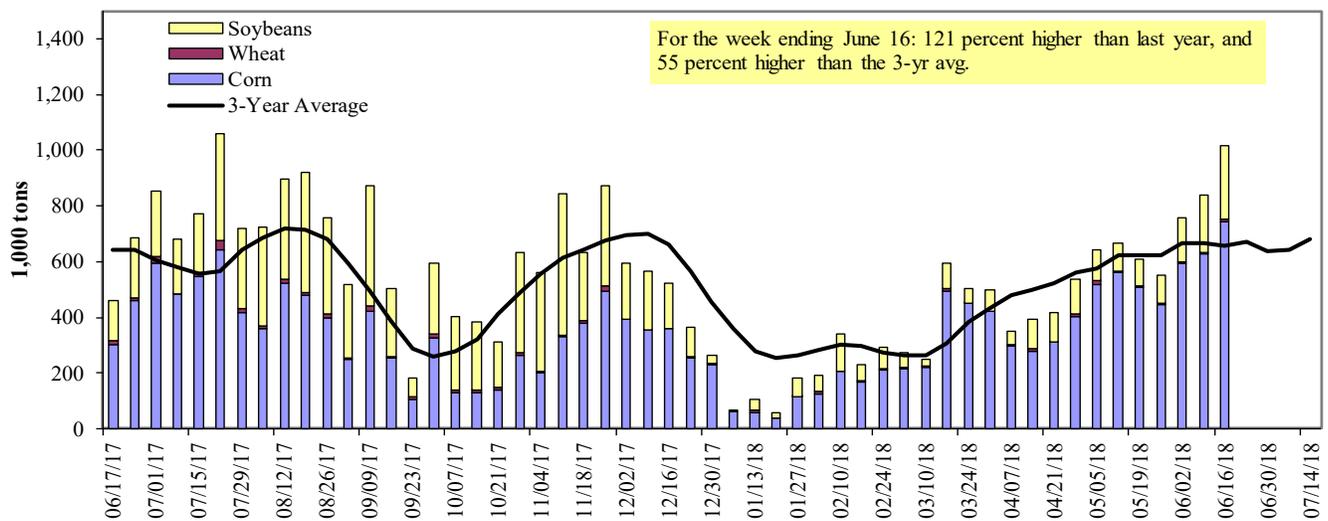


Figure 10

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

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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 06/16/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	323	5	138	2	467
Winfield, MO (L25)	487	6	207	0	700
Alton, IL (L26)	709	6	257	0	972
Granite City, IL (L27)	745	6	265	0	1,016
Illinois River (L8)	158	0	39	0	197
Ohio River (L52)	63	12	37	0	112
Arkansas River (L1)	0	11	53	0	64
Weekly total - 2018	807	30	355	0	1,192
Weekly total - 2017	331	36	194	5	567
2018 YTD ¹	10,484	710	5,136	63	16,393
2017 YTD	11,520	995	5,561	157	18,234
2018 as % of 2017 YTD	91	71	92	40	90
Last 4 weeks as % of 2017 ²	132	72	136	34	129
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.

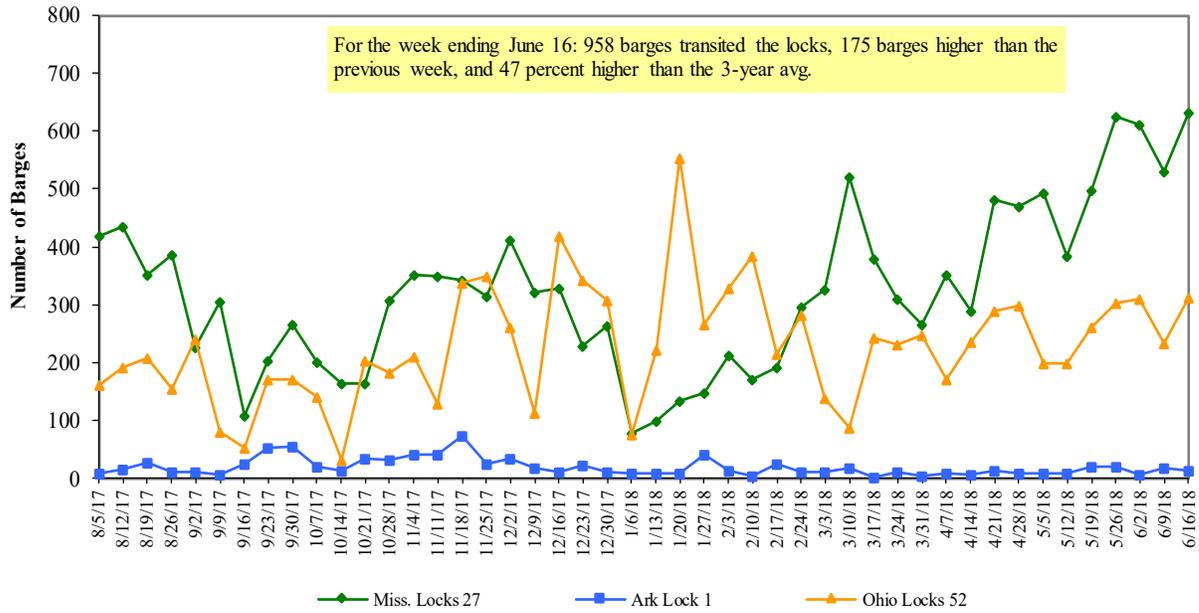
² As a percent of same period in 2017.

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

Source: U.S. Army Corps of Engineers

Figure 11

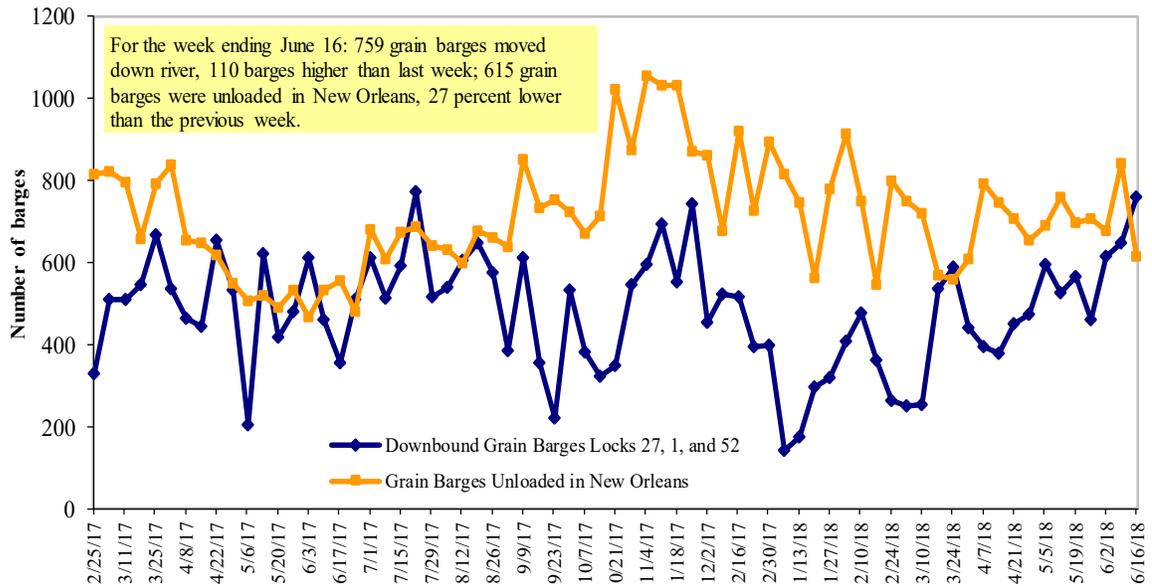
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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 6/18/2018 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.240	-0.024	0.701
	New England	3.290	-0.002	0.700
	Central Atlantic	3.397	-0.023	0.714
	Lower Atlantic	3.121	-0.027	0.694
II	Midwest ²	3.173	-0.026	0.762
III	Gulf Coast ³	3.016	-0.021	0.687
IV	Rocky Mountain	3.339	-0.005	0.714
V	West Coast	3.753	-0.016	0.971
	West Coast less California	3.473	-0.016	0.818
	California	3.976	-0.014	1.092
Total	U.S.	3.244	-0.022	0.755

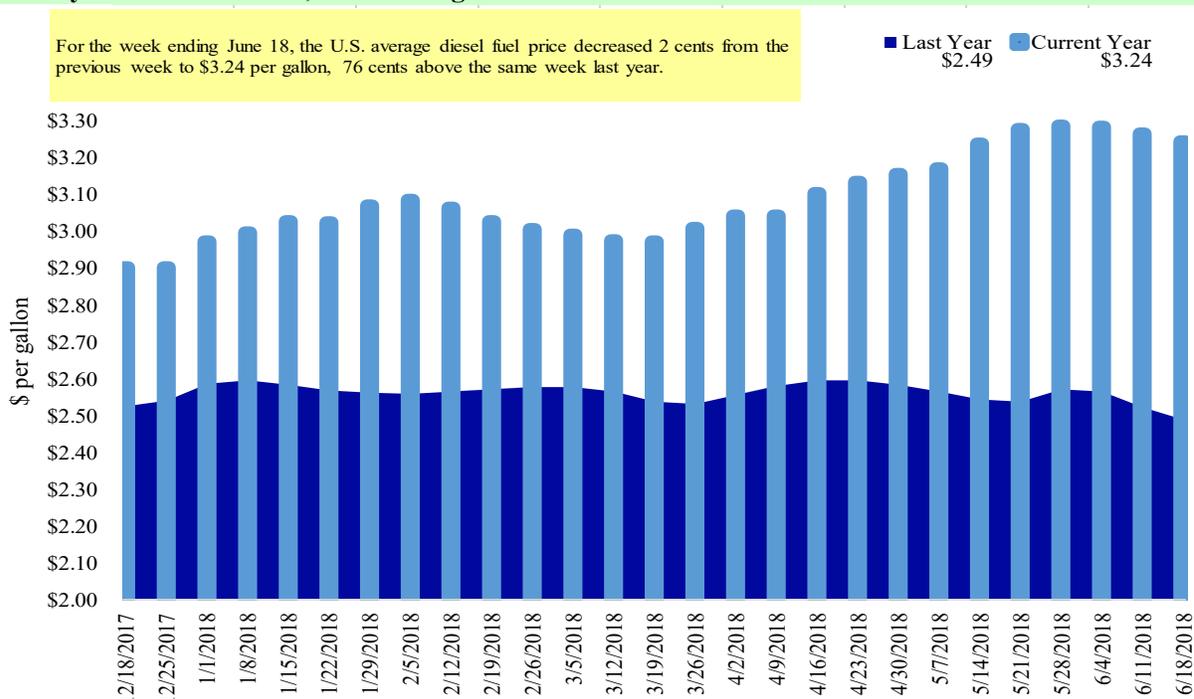
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
6/7/2018	948	524	1,377	1,265	103	4,217	15,828	8,948	28,993
This week year ago	2,122	616	1,816	1,531	179	6,264	10,547	6,973	23,784
Cumulative exports-marketing year²									
2017/18 YTD	67	78	113	52	0	310	40,409	47,202	87,920
2016/17 YTD	342	68	127	156	26	718	44,070	51,965	96,753
YTD 2017/18 as % of 2016/17	20	115	89	33	0	43	92	91	91
Last 4 wks as % of same period 2016/17	29	67	56	57	35	48	158	133	122
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

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 6/07/2018	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2014-2016
	2018/19	2017/18	2016/17		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				
Mexico	1,587	14,008	13,067	7	12,297
Japan	863	10,634	11,028	(4)	11,450
Korea	0	5,083	5,516	(8)	4,494
Colombia	0	4,260	4,122	3	4,179
Peru	23	2,816	2,860	(2)	2,693
Top 5 Importers	2,472	36,800	36,593	1	35,113
Total US corn export sales	3,311	56,237	54,617	3	49,308
% of Projected		96%	94%		
Change from prior week ²	240	936	601		
Top 5 importers' share of U.S. corn export sales	75%	65%	67%		71%
USDA forecast, June 2018	53,435	58,524	58,346	0	
Corn Use for Ethanol USDA forecast, June 2018	144,145	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 6/07/2018	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2014-2016
	2018/19 Next MY	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	1,458	28,678	35,957	(20)	31,881
Mexico	659	4,269	3,516	21	3,452
Indonesia	72	2,298	2,042	13	1,987
Japan	120	2,103	2,130	(1)	2,067
Netherlands	0	1,698	1,638	4	2,098
Top 5 importers	2,309	39,045	45,283	(14)	41,486
Total US soybean export sales	6,654	56,150	58,938	(5)	52,919
% of Projected	11%	100%	99%		
Change from prior week ²	291	520	340		
Top 5 importers' share of U.S. soybean export sales	35%	70%	77%		78%
USDA forecast, June 2018	62,398	56,267	59,237	95	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esquery/. The 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 6/07/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	652	461	41	2,620
Mexico	349	1,003	(65)	2,743
Philippines	540	555	(3)	2,395
Brazil	93	30	210	862
Nigeria	140	274	(49)	1,254
Korea	463	591	(22)	1,104
China	0	323	(100)	1,623
Taiwan	181	203	(11)	768
Indonesia	100	190	(47)	726
Colombia	25	152	(84)	635
Top 10 importers	2,542	3,780	(33)	14,729
Total US wheat export sales	4,527	6,982	(35)	22,804
% of Projected	18%	24%		
Change from prior week ²	302	461		
Top 10 importers' share of U.S. wheat export sales	56%	54%		65%
USDA forecast, June 2018	24,523	28,747	(15)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2016/17 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esquery/.

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

³ 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 06/14/18	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	291	254	115	5,633	7,385	76	65	88	14,805
Corn	557	449	124	10,322	7,685	134	127	194	10,928
Soybeans	146	132	111	4,962	4,448	112	181	526	13,246
Total	994	835	119	20,917	19,517	107	106	160	38,978
Mississippi Gulf									
Wheat	62	115	53	1,989	2,296	87	65	79	4,198
Corn	871	678	128	16,270	16,741	97	155	128	28,690
Soybeans	433	333	130	10,930	11,334	96	182	207	32,911
Total	1,366	1,127	121	29,189	30,370	96	150	137	65,800
Texas Gulf									
Wheat	39	36	106	1,853	3,476	53	32	44	6,354
Corn	0	38	0	375	376	100	380	185	733
Soybeans	44	12	377	67	0	n/a	n/a	n/a	292
Total	82	86	96	2,295	3,852	60	54	70	7,379
Interior									
Wheat	0	16	0	704	816	86	108	119	1,727
Corn	192	197	97	3,944	3,917	101	92	114	8,758
Soybeans	128	166	77	3,027	2,371	128	146	203	5,508
Total	320	378	85	7,674	7,104	108	109	139	15,993
Great Lakes									
Wheat	2	20	8	242	253	96	93	132	711
Corn	19	23	84	174	96	182	160	169	192
Soybeans	49	31	156	152	126	121	225	675	890
Total	69	74	93	568	475	120	144	211	1,793
Atlantic									
Wheat	0	0	n/a	64	37	172	0	0	46
Corn	0	0	n/a	67	5	n/a	n/a	514	32
Soybeans	62	7	851	1,032	877	118	266	323	2,001
Total	62	7	851	1,163	918	127	306	318	2,079
U.S. total from ports*									
Wheat	393	442	89	10,484	14,263	74	59	79	27,841
Corn	1,639	1,386	118	31,152	28,819	108	136	143	49,333
Soybeans	861	680	127	20,170	19,156	105	181	259	54,847
Total	2,893	2,508	115	61,806	62,237	99	119	141	132,021

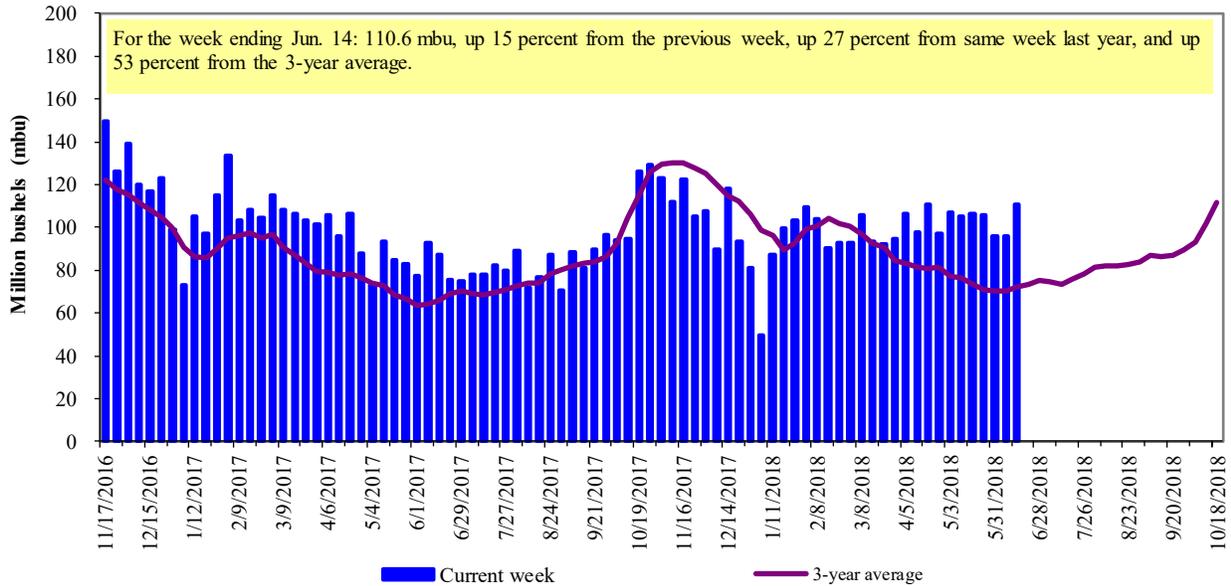
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2017.

Figure 14

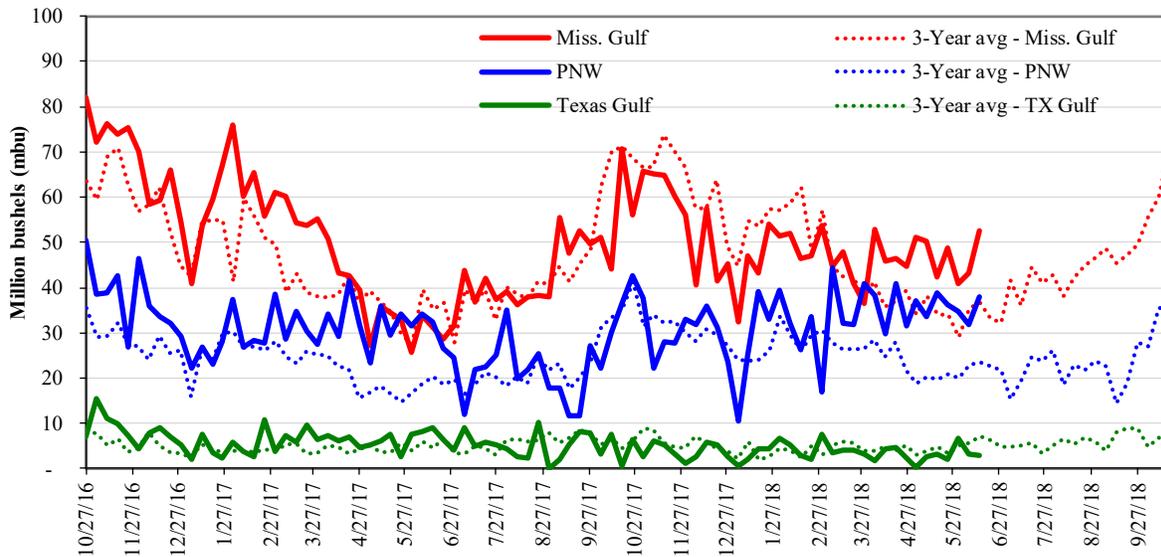
U.S. grain inspected for export (wheat, corn, and soybeans)



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

Figure 15

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



Week ending 06/14/18 inspections (mbu):		Percent change from:				
Mississippi Gulf:	52.5	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	38.0	Last Year (same week):	up 22	down 7	up 20	up 19
Texas Gulf:	3.0	3-yr avg. (4-wk. mov. Avg):	up 69	down 67	up 38	up 17
			up 55	down 43	up 42	up 74

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

Ocean Transportation

Table 17

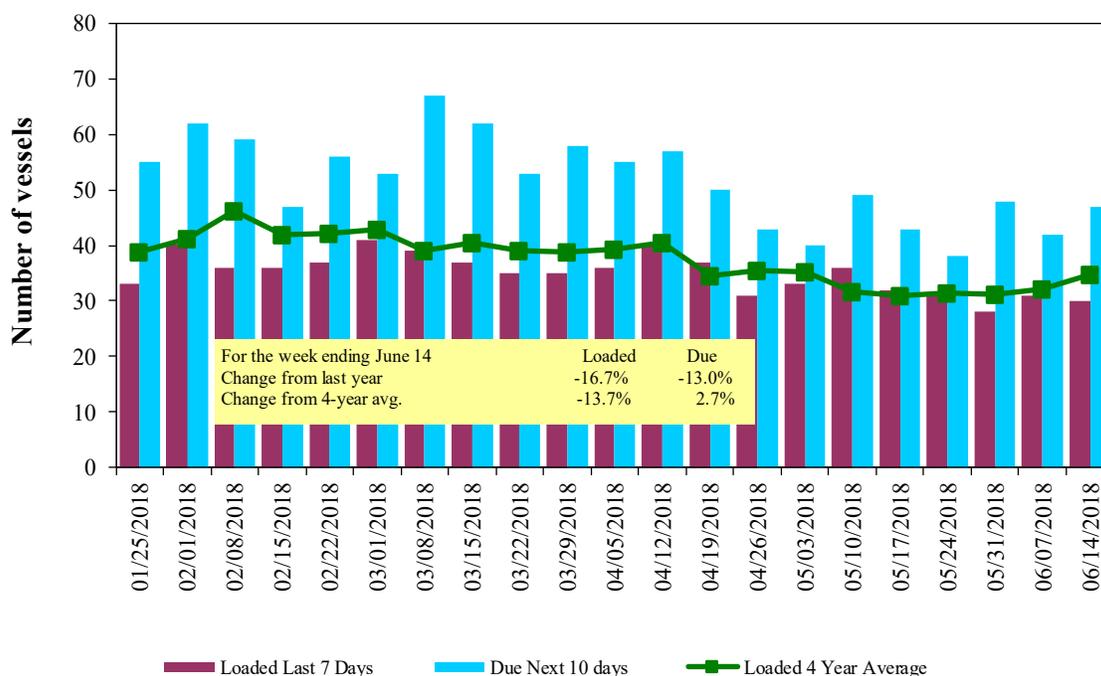
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
6/14/2018	23	30	47	21
6/7/2018	31	31	42	24
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

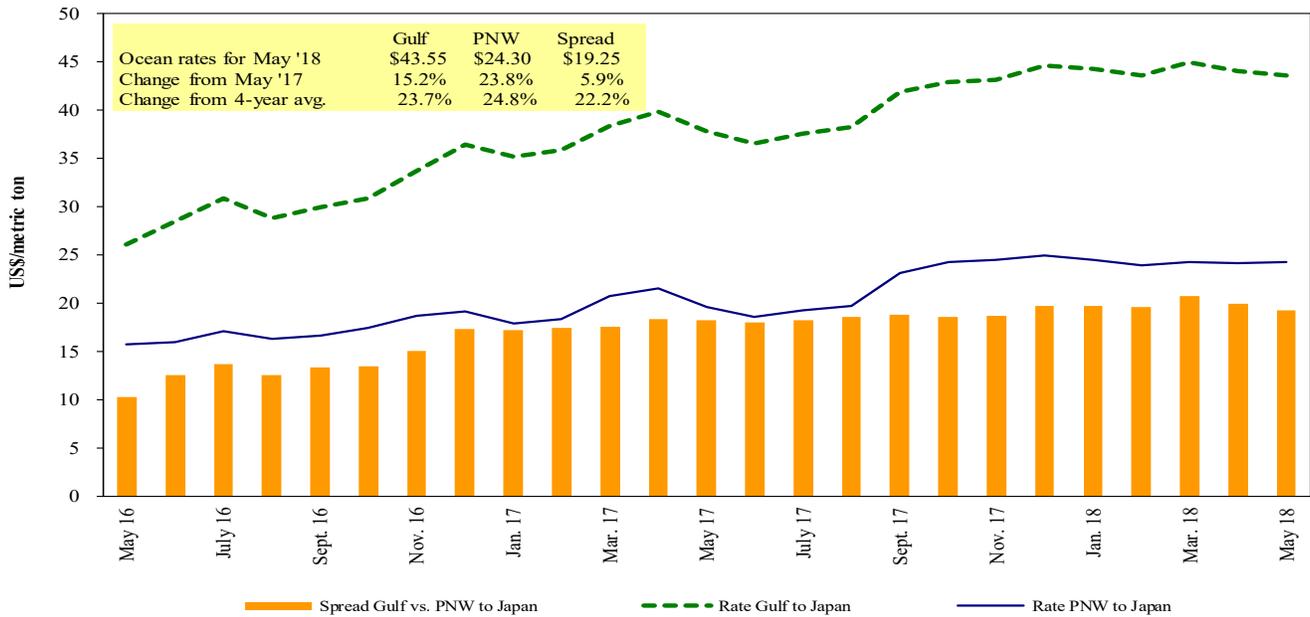
U.S. Gulf Vessel Loading Activity



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 06/16/2018

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	Jun 25/30	65,000	23.00
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	Jun 22/30	60,000	35.00
Brazil	China	Heavy Grain	Jun 22/30	60,000	33.75
Brazil	China	Heavy Grain	Jun 20/30	60,000	33.25
Brazil	China	Heavy Grain	Jun 20/26	60,000	32.50
Brazil	China	Heavy Grain	Jun 12/20	66,000	30.75
Brazil	China	Heavy Grain	May 26/Jun 2	66,000	31.50
Brazil	China	Heavy Grain	May 20/30	60,000	30.75
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

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

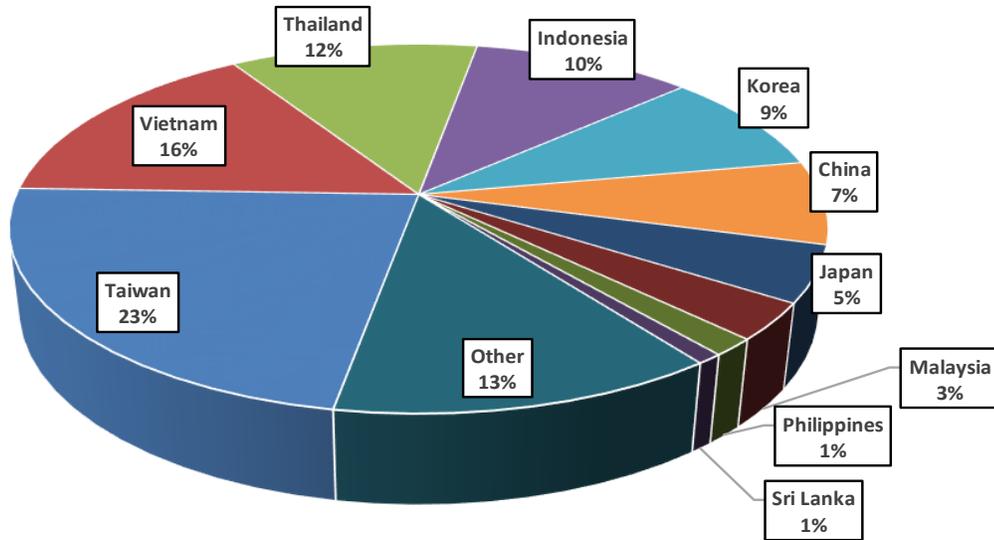
* 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-March 2018

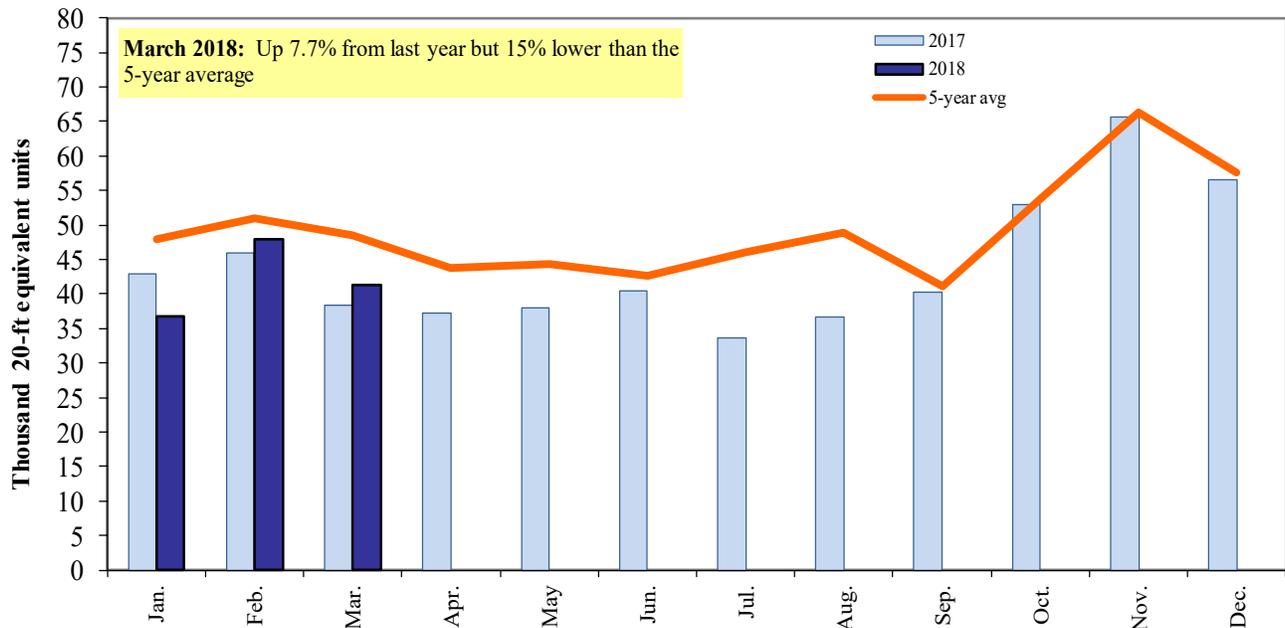


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

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