



Grain Transportation Report

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



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August 24, 2017

WEEKLY HIGHLIGHTS

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Grain Inspections Increase from Previous Week

For the week ending August 17, **total inspections of grain** (corn, wheat, and soybeans) for export from major U.S. export regions reached 2 million metric tons (mmt), up 5 percent from the previous week, down 30 percent from the same time last year, and unchanged from the 3-year average. Wheat and soybean inspections increased 14 and 13 percent, respectively, from the previous week while corn inspections decreased 9 percent. Total Pacific Northwest (PNW) grain inspections increased 10 percent from the past week due primarily to notable increases in wheat and soybean shipments. Inspections in the Mississippi Gulf increased 5 percent. Outstanding (unshipped) export sales were up for wheat, but down for corn and soybeans.

The Port of Los Angeles Strives to Improve Efficiencies through "Digitization" . . .

GE Transportation is working with the Port of Los Angeles to provide a digital solution platform to help improve port efficiencies. The project was implemented a year ago as a test pilot with a portion of the port's terminals. Because of the success of the pilot, the port is now planning to expand the project to include all terminals and shipping lines, pending review by the Los Angeles City Council. The platform brings together multiple sources of data from the terminals, trucking companies, shipping lines, and government officials allowing shippers to better digitize the total supply chain.

. . . and Off-Dock Container and Chassis Storage

The Journal of Commerce reports the Port of Los Angeles is exploring an opportunity to repurpose surplus properties as near-dock yards for container and chassis storage. The properties would allow truckers to access some containers and chassis without entering the terminals' gates. Additionally, the properties would reduce overall congestion on the terminals by providing another avenue for equipment storage. The neighboring Port of Long Beach is also exploring this opportunity and potentially using these type of properties for full time chassis storage. The ports of Los Angeles and Long Beach are the busiest container ports in the country and the top export port region for containerized grain products.

Snapshots by Sector

Export Sales

For the week ending August 10, **unshipped balances** of wheat, corn, and soybeans totaled 13.8 mmt, down 22 percent from the same time last year. Net weekly **wheat export sales** were .634 mmt, up 37 percent from the previous week. Net **corn export sales** were .063 mmt, up 21 percent from the previous week, and net **soybean export sales** were .453 mmt, up significantly from the past week.

Rail

U.S. Class I railroads originated 19,080 **grain carloads** for the week ending August 12, down 8 percent from the previous week, down 24 percent from last year, and down 14 percent from the 3-year average.

Average September shuttle **secondary railcar** bids/offers per car were \$54 below tariff for the week ending August 17, down \$47 from last week, and \$1,060 lower than last year. Average non-shuttle secondary railcar bids/offers per car were \$16 below tariff, \$66 lower than last year. There were no non-shuttle bids/offers last week.

Barge

For the week ending August 19, **barge grain movements** totaled 1,006,928 tons, 8 percent higher than the last week, and down 12 percent from the same period last year.

For the week ending August 19, 649 grain barges **moved down river**, up 7 percent from last week, 677 grain barges were **unloaded in New Orleans**, up 13 percent from the previous week.

Ocean

For the week ending August 17, 35 **ocean-going grain vessels** were loaded in the Gulf, 10 percent less than the same period last year. Fifty-two vessels are expected to be loaded within the next 10 days, 40 percent less than the same period last year.

For the week ending August 17, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$39 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was \$20 per metric ton, unchanged from the previous week.

Fuel

During the week ending August 21, average **diesel fuel prices** remain unchanged from the previous week at \$2.60 per gallon, 23 cents above the same week last year.

Feature Article/Calendar

A Look at the Production, Use, and Transportation of U.S. Grain Sorghum

Grain sorghum (milo) is a versatile, high-energy, drought-tolerant crop with many uses. Traditionally, grain sorghum has been used for livestock feed in the United States, providing a similar feed value to that of corn. Sorghum stems and foliage are often used on-farm for green chop, hay, silage, and pasture. Additionally, humans around the world consume products derived from grain sorghum, a practice becoming increasingly popular in the United States in recent years.¹ The United States typically exports more than half of its domestic production, making shipments to other countries an important use for the grain. Transportation is essential to the U.S. supply chain for grain sorghum because it brings the crop from farms to commercial facilities and to domestic and international consumers. This article briefly discusses grain sorghum production in the United States, exports, and the use of railroad and barge transportation to transport sorghum.

Production of U.S. Grain Sorghum

Sorghum is the fourth largest crop harvested for grain in the United States behind the major commodities of corn, soybeans, and wheat, and contributes a smaller but important share of the Nation's grain transportation demand. The crop's water requirements are lower than other crops, making it relatively drought-tolerant and well-suited to dry climates. Grain sorghum production in the United States generally fell annually from relative highs in the mid-1980s, before increasing since 2011. More recently in the 2016/17 marketing year, U.S. farmers harvested 13.4 million tons of grain sorghum, 19 percent less than last year, but about on par with the prior 3-year average.

As shown in Figure 1, the center of the country produces most grain sorghum, stretching all the way from South Dakota to South Texas. Within this region, grain sorghum production is concentrated, with two States harvesting 80 percent of the total. Kansas led production in 2016/17 with 7.5 million (mil.) tons or 56 percent, followed by Texas (3.2 mil. tons, 24 percent), Colorado (0.6 mil. tons, 4 percent), Oklahoma (0.6 mil. tons, 4 percent), and South Dakota (0.4 mil. tons, 3 percent). Together, these States accounted for more than 90 percent of the annual production.

Use of U.S. Grain Sorghum

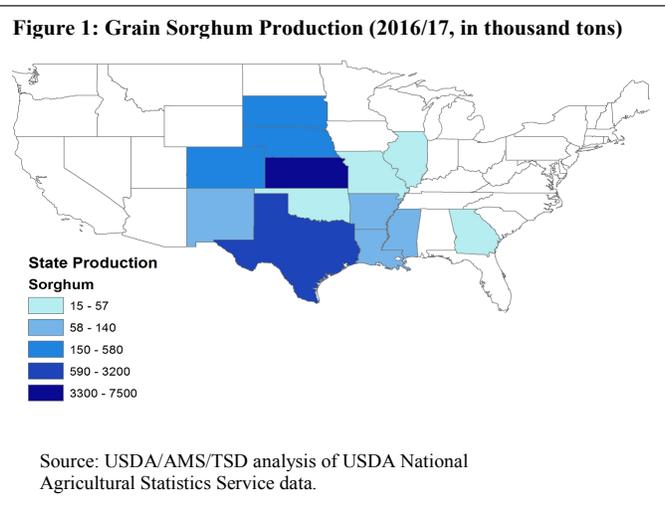
End-users consume grain sorghum in a variety of ways, such as for food production, feed for livestock, and exports. Over time, use by exports and industry (e.g., food, alcohol) has expanded, while the amount used for feed has declined.²

Exports—an important market for U.S. sorghum producers—have generally expanded in recent years, typically accounting for more than half of annual production. The market for U.S. grain sorghum exports is highly concentrated, with the vast majority typically going to East Asia, and smaller amounts to Mexico, Sub-Saharan Africa, and South Asia. In the 2015/16 marketing year, China—the major destination for U.S. sorghum exports—imported 7.7 million tons of U.S. grain sorghum (82 percent of the total), followed by Mexico (7 percent), Pakistan (2 percent), Sudan (2 percent), and South Africa (1 percent).³ Together, these five countries received 95 percent of the total U.S. sorghum exports in 2015/16.

Transportation of U.S. Grain Sorghum

The United States relies on multiple transportation modes to ensure delivery of sorghum to domestic markets and other countries. Truck, the predominant mode, hauled about 74 percent of the total grain sorghum tonnage annually from 2009 to 2013.⁴ Over the same span, railroads transported about 20 percent and barges 6 percent per year. The modal shares for rail and waterway are particularly high for export moves. For example, railroads haul about 36 percent and barges 14 percent of the export tonnage for grain sorghum. The following presents additional highlights on barge and rail transportation for grain sorghum, modes for which relatively more data exist.

Barge: Inland waterways represent a relatively low-cost means of moving grain sorghum from southern States with river-access to the Mississippi Gulf for export. In 2014, barges moved 1 million tons of U.S. grain sorghum, about an 8 percent share of production and a 10 percent share of exports for the year.⁵



¹ Sorghum can serve as a gluten-free substitute for wheat, rye, and barley.

² Source: USDA Economic Research Service, *Feed Grains: Yearbook Tables*, July 17, 2017.

³ Ibid.

⁴ Source: Sparger, Adam, and Nick Marathon, USDA Agricultural Marketing Service, *Transportation of U.S. Grains: A Modal Share Analysis*, June 2015.

⁵ Waterborne Commerce Statistics; U.S. Army Corps of Engineers; and USDA/FAS: <https://apps.fas.usda.gov/gats/default.aspx>.

Table 1 summarizes grain sorghum barge movements in 2014, with the first column (in blue) representing major origins and the first row (in green) representing major destinations. Most barge movements of grain sorghum in 2014 were on the Mississippi River system destined for the Mississippi Gulf. More specifically, about 83 percent of the tonnage of grain sorghum by barge originated in the Lower Mississippi River region (the portion of the Mississippi River downstream of Cairo, Illinois). Originations on the Arkansas River region contributed another 10 percent, and the Upper Mississippi River region (the portion of the Mississippi River above Cairo, IL, excluding the Ohio River) accounted for about 5 percent.

Table 1: Sorghum Barge Shipments, 2014 (in thousand tons)

Origin/Destination	Lower Mississippi	Others	Total
Arkansas River	106	2	108
Upper Mississippi	42	8	49
Lower Mississippi	880	5	886
Others	8	0	8
Total	1,036	15	1,051

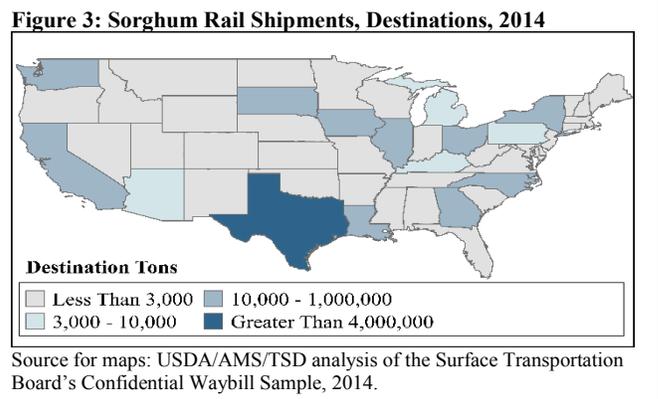
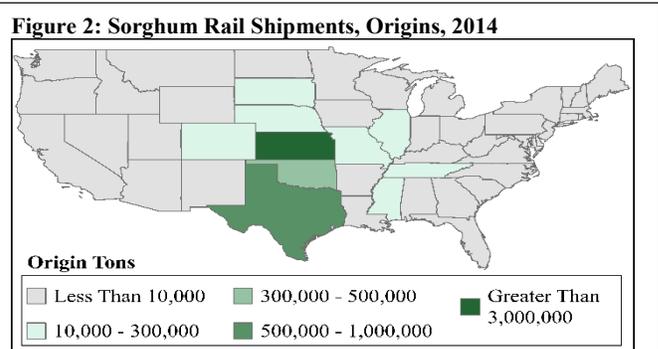
Source: Waterborne Commerce Statistics; U.S. Army Corps of Engineers.
 Note: "Others" category includes movements on the Ohio River, Mermentau River (in southern Louisiana), Houston Ship Channel, and other rivers.

Rail: After truck, rail is the next most prevalent provider of transportation for domestic sorghum shipments and exports. In 2014, railroads moved 4.8 million tons of grain sorghum, roughly a 40 percent share of production.⁶ Figures 2 and 3 provide visuals of sorghum shipments by rail in 2014, depicting the primary origin and destination locations.

Figure 2 shows that most of the sorghum shipped by rail originated from Midwestern and Southern States, corresponding to the major production areas in Figure 1. Kansas is the leading State, having shipped more than 65 percent of total grain sorghum by rail. Combining Kansas with Texas, Oklahoma, and South Dakota, these top four States shipped more than 94 percent of the total volume of grain sorghum by rail in 2014. Figure 3 shows the major rail destinations for sorghum shipments, which are also heavily concentrated geographically. Texas received more than 90 percent of sorghum shipments in 2014. Shipments to Texas likely reflect domestic use for livestock feed, direct rail shipments to Mexico, and export shipments out of the Gulf. None of the other destinations received more than 2 percent of total shipments, though they do show wider geographic distribution across the country, reflecting demand for domestic needs and exports from other ports.

In conclusion, its agronomic properties and numerous end use applications make grain sorghum a versatile crop. Along with truck, barge and rail support the movement of grain sorghum around the country to domestic consumers and ports for export. Barge plays a significant role shipping grain sorghum from southern States along the Mississippi River to the Mississippi Gulf for export. In addition, railroads help distribute the crop to both domestic and international consumers.

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⁶ Source: Surface Transportation Board, 2014 Carload Waybill data and USDA-NASS data.

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
08/23/17	174	261	208	190	174	142
08/16/17	376	257	205	171	165	135

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)

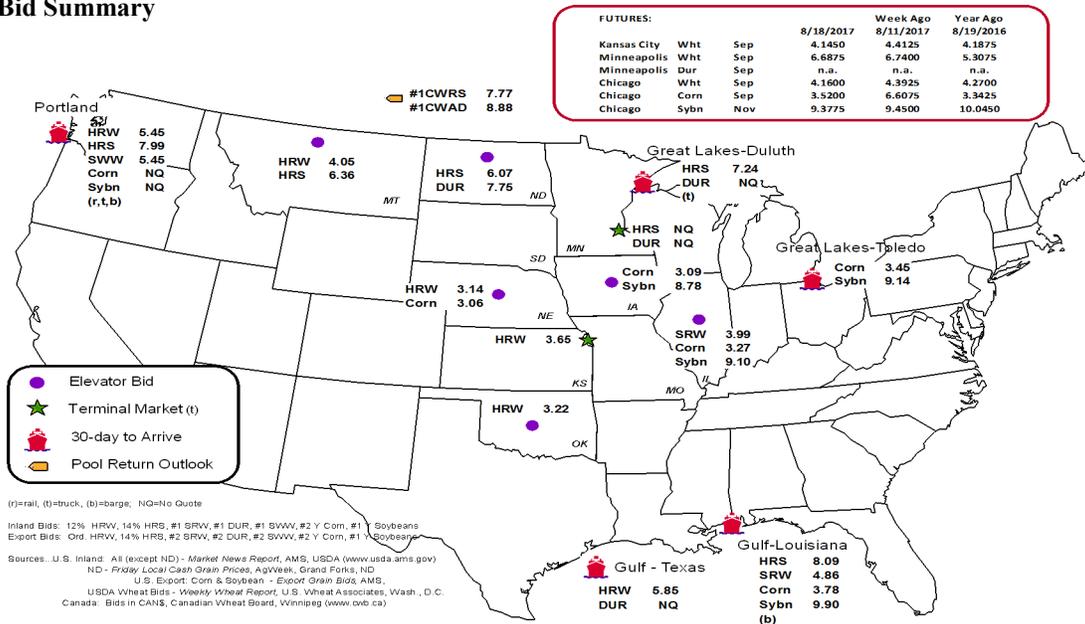
Commodity	Origin--Destination	8/18/2017	8/11/2017
Corn	IL--Gulf	-0.51	-0.52
Corn	NE--Gulf	-0.72	-0.69
Soybean	IA--Gulf	-1.12	-1.12
HRW	KS--Gulf	-2.20	-2.15
HRS	ND--Portland	-1.92	-2.15

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
	Gulf	Texas Gulf	Northwest	East Gulf			Mexico ³
08/16/2017 ^p	324	1,744	3,883	169	6,120	8/12/2017	1,919
08/09/2017 ^r	338	1,023	3,845	237	5,443	8/5/2017	1,952
2017 YTD ^r	16,394	56,636	188,418	12,747	274,195	2017 YTD	75,726
2016 YTD ^r	11,901	47,293	163,968	11,395	234,557	2016 YTD	67,509
2017 YTD as % of 2016 YTD	138	120	115	112	117	% change YTD	112
Last 4 weeks as % of 2016 ²	24	81	81	66	72	Last 4wks % 2016	115
Last 4 weeks as % of 4-year avg ²	77	83	134	106	115	Last 4wks % 4 yr	134
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.

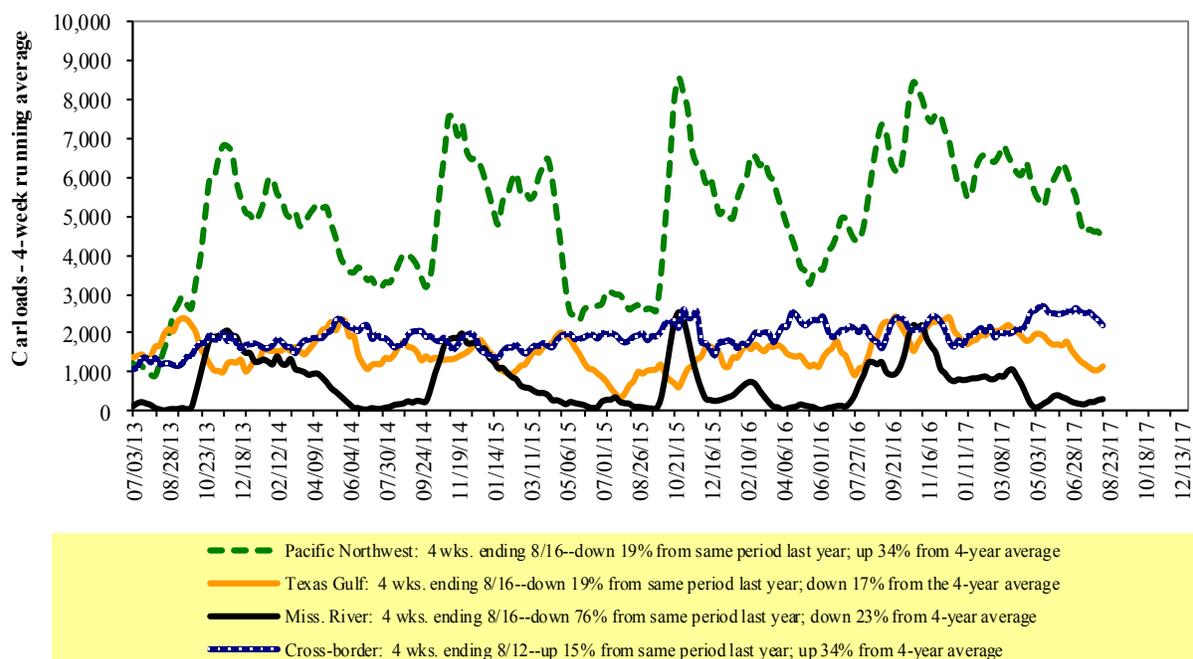
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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: 8/12/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,376	2,494	10,129	982	4,099	19,080	3,365	4,906
This week last year	1,501	2,530	13,518	533	7,159	25,241	4,304	4,596
2017 YTD	54,809	89,238	362,408	30,129	185,562	722,146	120,857	144,126
2016 YTD	55,246	89,568	344,873	27,138	171,536	688,361	106,185	136,154
2017 YTD as % of 2016 YTD	99	100	105	111	108	105	114	106
Last 4 weeks as % of 2016*	95	99	78	109	80	82	86	91
Last 4 weeks as % of 3-yr avg.**	75	96	96	107	86	92	86	90
Total 2016	95,179	151,024	590,779	45,246	300,836	1,183,064	193,930	234,738

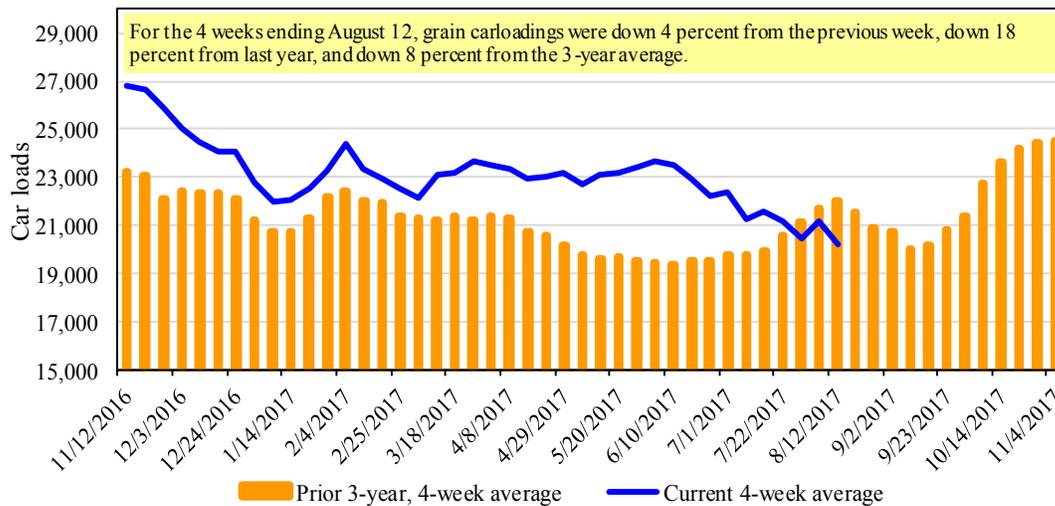
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 8/17/2017		Delivery period							
		Sep-17	Sep-16	Oct-17	Oct-16	Nov-17	Nov-16	Dec-17	Dec-16
BNSF ³	COT grain units	no bids	116	no bids	197	no offer	24	no bids	9
	COT grain single-car ⁵	no bids	206-400	0	213-255	no bids	134-225	0	12-133
UP ⁴	GCAS/Region 1	no bids	no offer	no bids	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bids	no offer	no bids	no offer	no offer	no offer	n/a	n/a

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

² Average premium/discount to tariff, last auction

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

⁴ UP - GCAS = Grain Car Allocation System

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

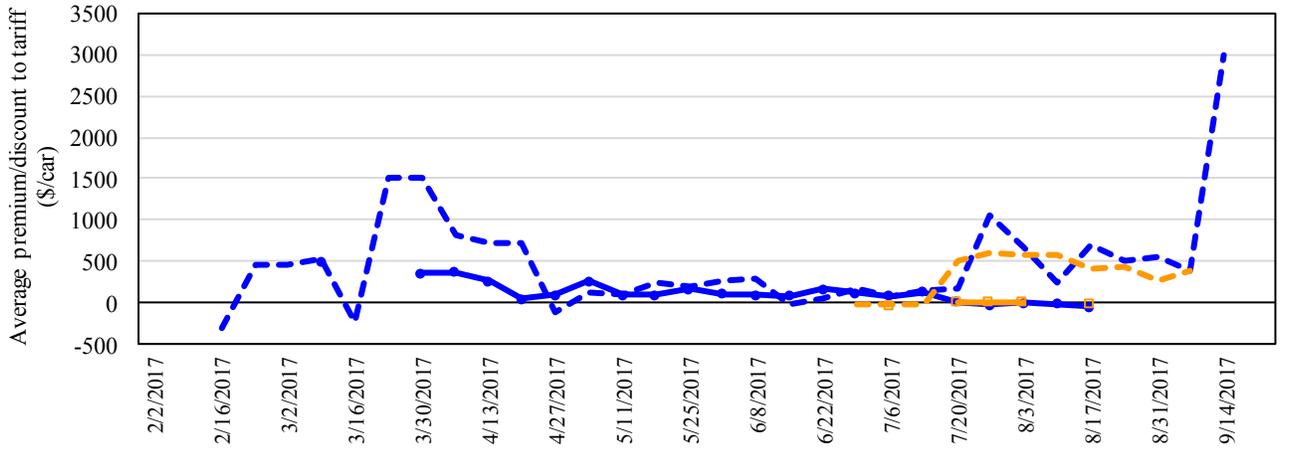
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

⁵ Range 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 September 2017, Secondary Market



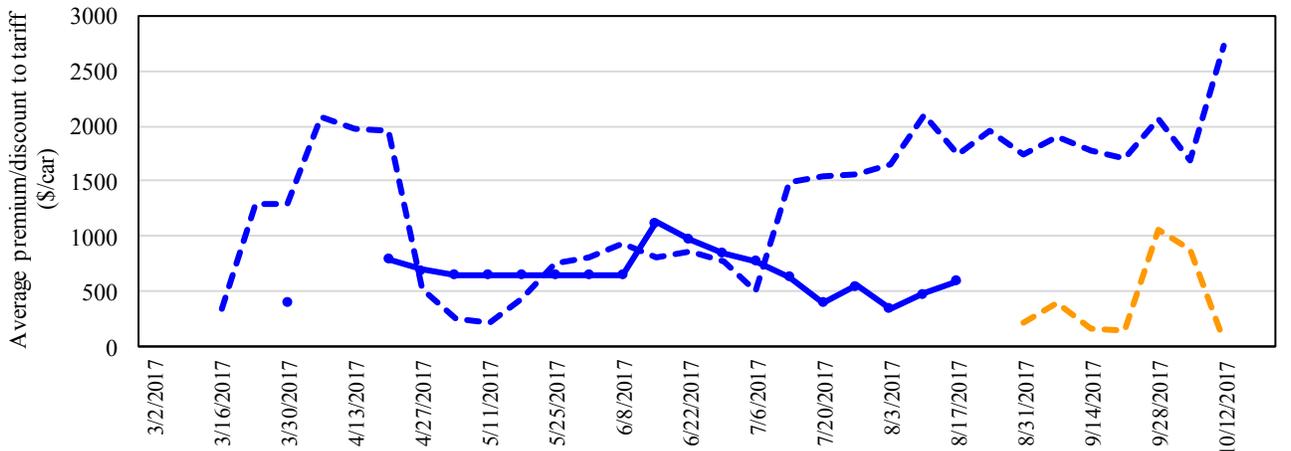
	8/17/2017	BNSF	UP
Non-Shuttle	-\$31		\$0
Shuttle	-\$85		-\$22

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

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are \$16 below the peak. Average Shuttle bids/offers fell \$47 this week and are \$554 below the peak.

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

Figure 5
Bids/Offers for Railcars to be Delivered in October 2017, Secondary Market



	8/17/2017	BNSF	UP
Non-Shuttle	n/a		n/a
Shuttle	\$700		\$500

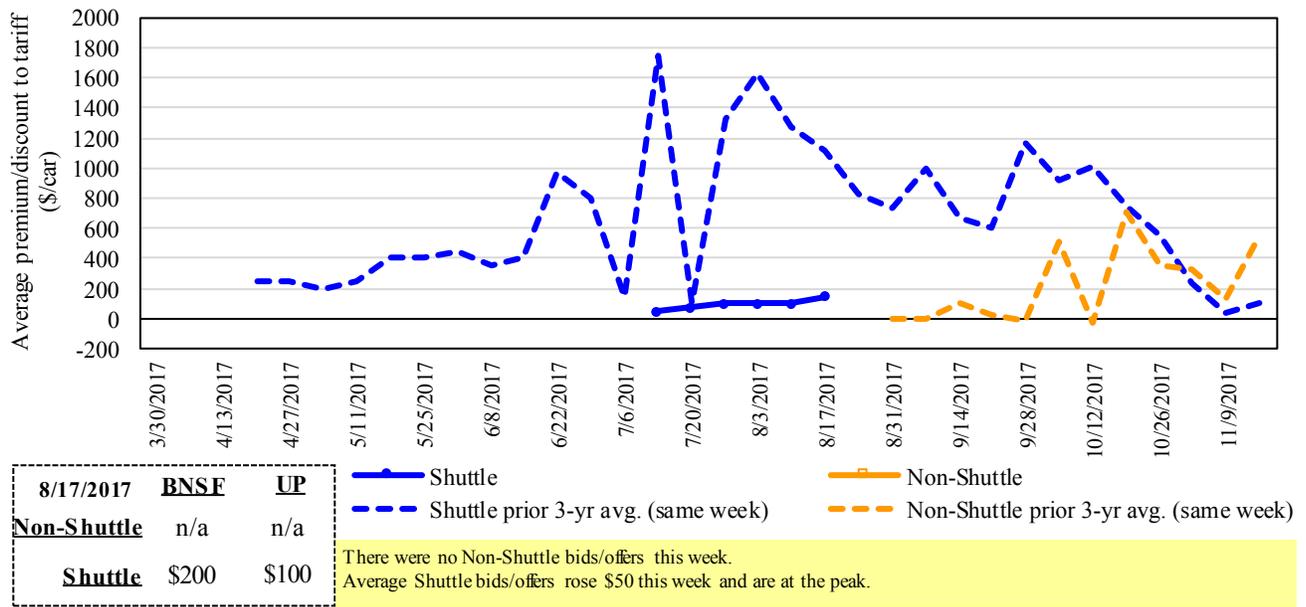
—●— Shuttle —□— Non-Shuttle
- - - Shuttle prior 3-yr avg. (same week) - - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers this week. Average Shuttle bids/offers rose \$119 this week and are \$525 below the peak.

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

Figure 6

Bids/Offers for Railcars to be Delivered in November 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: 8/17/2017		Delivery period					
		Sep-17	Oct-17	Nov-17	Dec-17	Jan-18	Feb-18
Non-shuttle	BNSF-GF	(31)	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 2016	(81)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	0	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 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(85)	700	200	(58)	n/a	n/a
	Change from last week	(95)	100	200	42	n/a	n/a
	Change from same week 2016	(1098)	(1050)	(1050)	n/a	n/a	n/a
	UP-Pool	(22)	500	100	(67)	n/a	n/a
	Change from last week	3	137	(100)	33	n/a	n/a
	Change from same week 2016	(1022)	(850)	(300)	(242)	n/a	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

August, 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	\$46	\$39.01	\$1.06	8	
	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	\$80	\$45.88	\$1.25	7	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5	
	Northwest KS	Galveston-Houston, TX	\$4,816	\$88	\$48.70	\$1.33	7	
	Amarillo, TX	Los Angeles, CA	\$5,021	\$122	\$51.07	\$1.39	7	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$91	\$37.45	\$0.95	1	
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	0	
	Des Moines, IA	Davenport, IA	\$2,258	\$19	\$22.61	\$0.57	4	
	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	\$56	\$35.65	\$0.91	3	
	Des Moines, IA	Los Angeles, CA	\$5,202	\$164	\$53.29	\$1.35	4	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,634	\$60	\$36.68	\$1.00	-4	
	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	\$91	\$45.54	\$1.24	3	
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	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	0	
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0	
	Northwest KS	Portland, OR	\$5,812	\$144	\$59.15	\$1.61	7	
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	\$91	\$35.47	\$0.90	1	
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	3	
	Des Moines, IA	Amarillo, TX	\$3,895	\$71	\$39.38	\$1.00	3	
	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	\$104	\$45.97	\$1.25	3	
Toledo, OH		Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	0	
Grand Island, NE	Portland, OR	\$5,460	\$147	\$55.68	\$1.52	2		

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

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 state	Destination region	Tariff rate/car ¹	Fuel		Percent change ⁴ Y/Y	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ / bushel ³		
Date: August, 2017							
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$63	\$68.39	\$1.86	2
	KS	Guadalajara, JA	\$7,309	\$246	\$77.19	\$2.10	7
	TX	Salinas Victoria, NL	\$4,292	\$37	\$44.24	\$1.20	4
Corn	IA	Guadalajara, JA	\$8,187	\$198	\$85.68	\$2.17	2
	SD	Celaya, GJ	\$7,580	\$0	\$77.45	\$1.97	1
	NE	Queretaro, QA	\$7,909	\$125	\$82.09	\$2.08	1
	SD	Salinas Victoria, NL	\$6,635	\$0	\$67.79	\$1.72	1
	MO	Tlalnepantla, EM	\$7,268	\$122	\$75.51	\$1.92	1
	SD	Torreon, CU	\$7,180	\$0	\$73.36	\$1.86	1
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$209	\$90.48	\$2.46	1
	NE	Guadalajara, JA	\$8,942	\$212	\$93.53	\$2.54	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	-5
	KS	Torreon, CU	\$7,489	\$142	\$77.96	\$2.12	2
Sorghum	NE	Celaya, GJ	\$7,164	\$177	\$75.01	\$1.90	-1
	KS	Queretaro, QA	\$7,608	\$78	\$78.53	\$1.99	1
	NE	Salinas Victoria, NL	\$6,213	\$63	\$64.12	\$1.63	1
	NE	Torreon, CU	\$6,607	\$129	\$68.83	\$1.75	0

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.

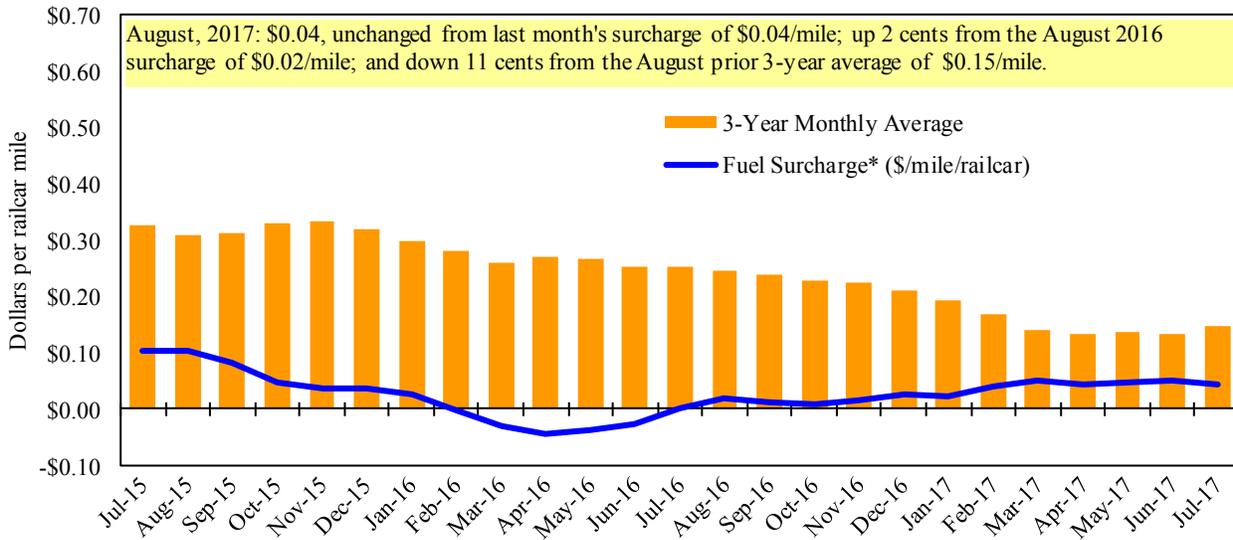
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

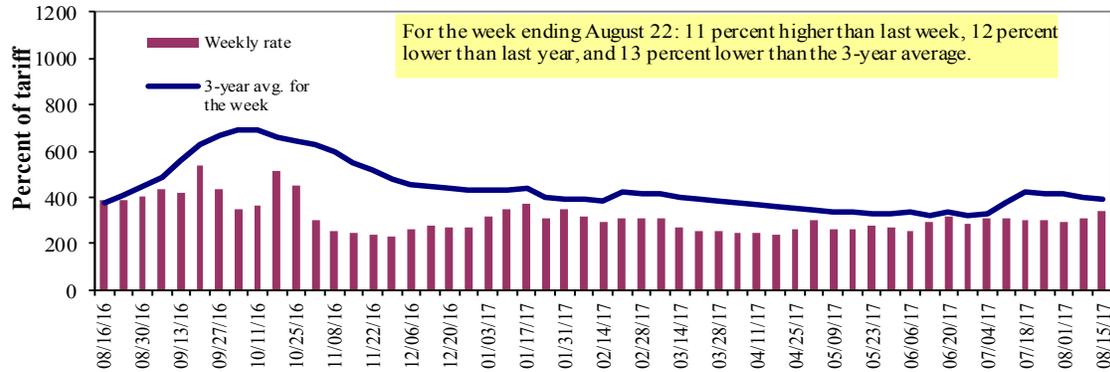
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	8/22/2017	417	334	342	235	292	292	203
	8/15/2017	408	308	308	210	250	250	185
\$/ton	8/22/2017	25.81	17.77	15.87	9.38	13.69	11.80	6.37
	8/15/2017	25.26	16.39	14.29	8.38	11.73	10.10	5.81
Current week % change from the same week:								
	Last year	-11	-20	-12	-12	-10	-10	-21
	3-year avg. ²	-13	-19	-13	-26	-18	-18	-33
Rate¹	September	425	378	365	263	363	363	250
	November	438	364	364	280	388	388	263

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.

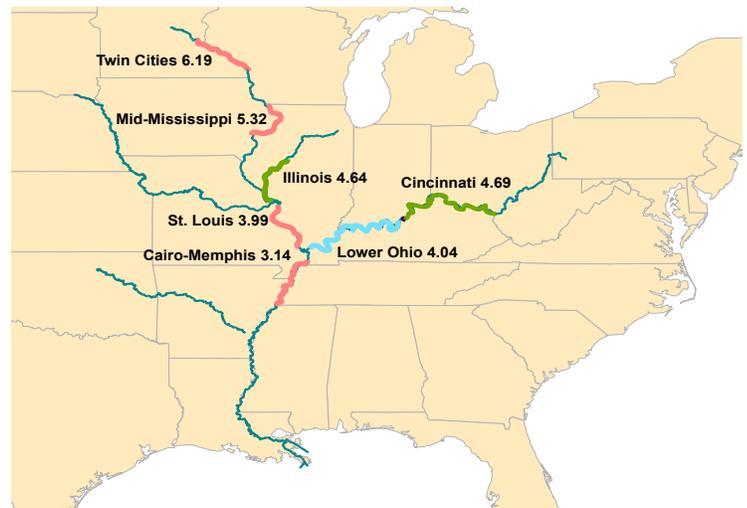
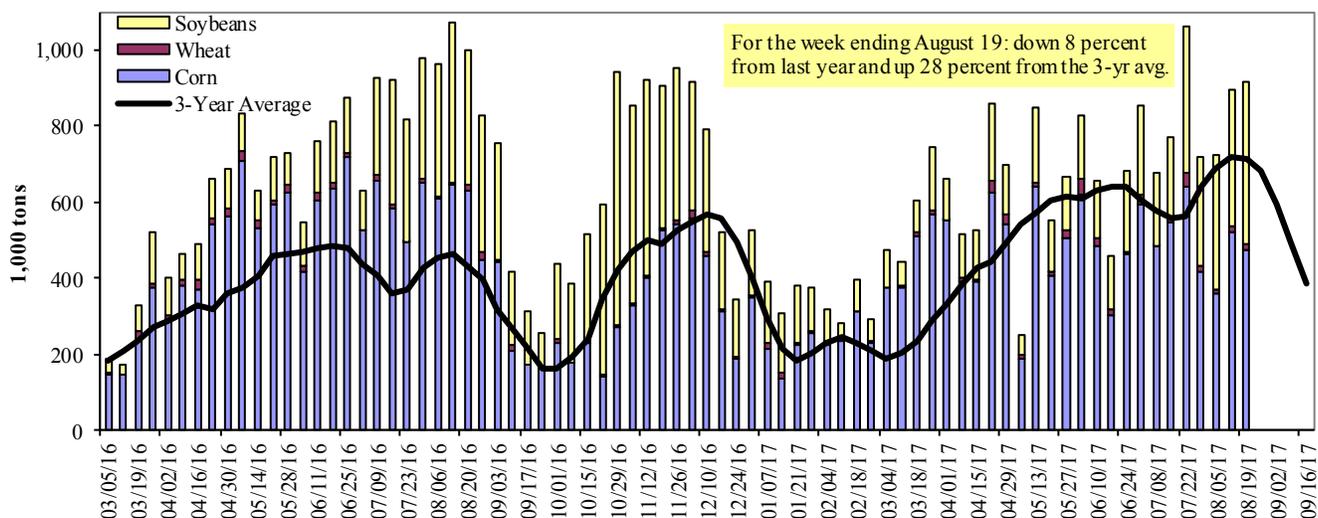


Figure 10

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 8/19/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	258	6	212	5	481
Winfield, MO (L25)	384	13	290	6	692
Alton, IL (L26)	447	8	410	2	866
Granite City, IL (L27)	477	13	429	2	920
Illinois River (L8)	61	0	81	0	142
Ohio River (L52)	14	32	27	0	73
Arkansas River (L1)	0	13	1	0	14
Weekly total - 2017	491	57	457	2	1,007
Weekly total - 2016	682	60	404	2	1,148
2017 YTD ¹	16,102	1,647	8,587	203	26,538
2016 YTD	16,828	1,499	7,760	183	26,269
2017 as % of 2016 YTD	96	110	111	111	101
Last 4 weeks as % of 2016 ²	63	98	97	239	77
Total 2016	24,136	2,030	16,668	344	43,178

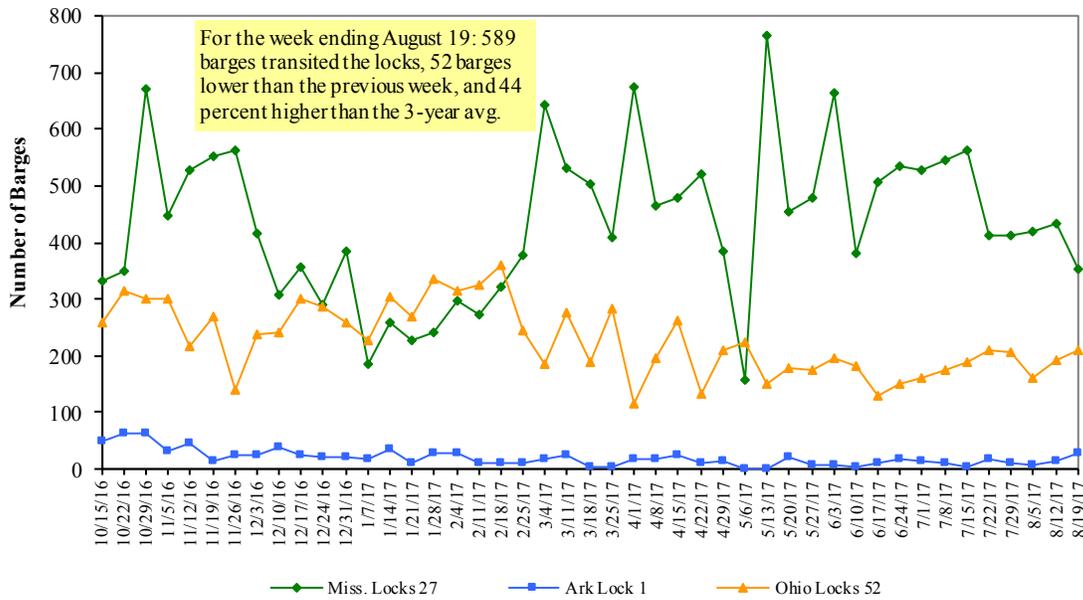
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

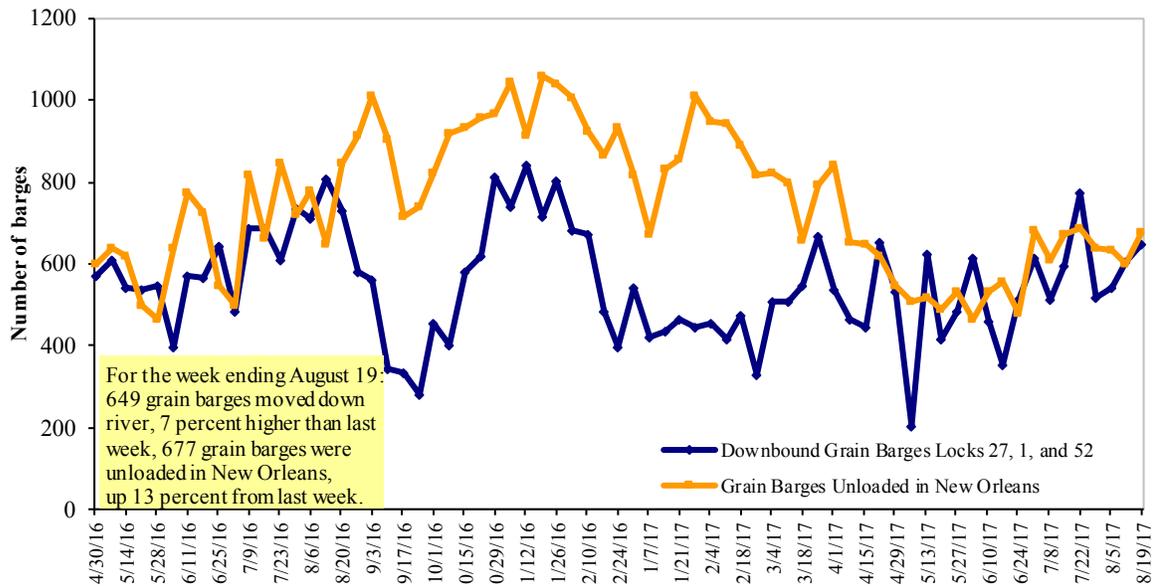
Source: U.S. Army Corps of Engineers

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 8/21/2017(US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.617	-0.007	0.250
	New England	2.616	-0.009	0.225
	Central Atlantic	2.756	-0.005	0.299
	Lower Atlantic	2.519	-0.008	0.225
II	Midwest ²	2.567	-0.003	0.225
III	Gulf Coast ³	2.410	-0.002	0.159
IV	Rocky Mountain	2.714	0.014	0.279
V	West Coast	2.883	0.006	0.260
	West Coast less California	2.786	-0.002	0.288
	California	2.930	0.012	0.238
Total	U.S.	2.596	-0.002	0.226

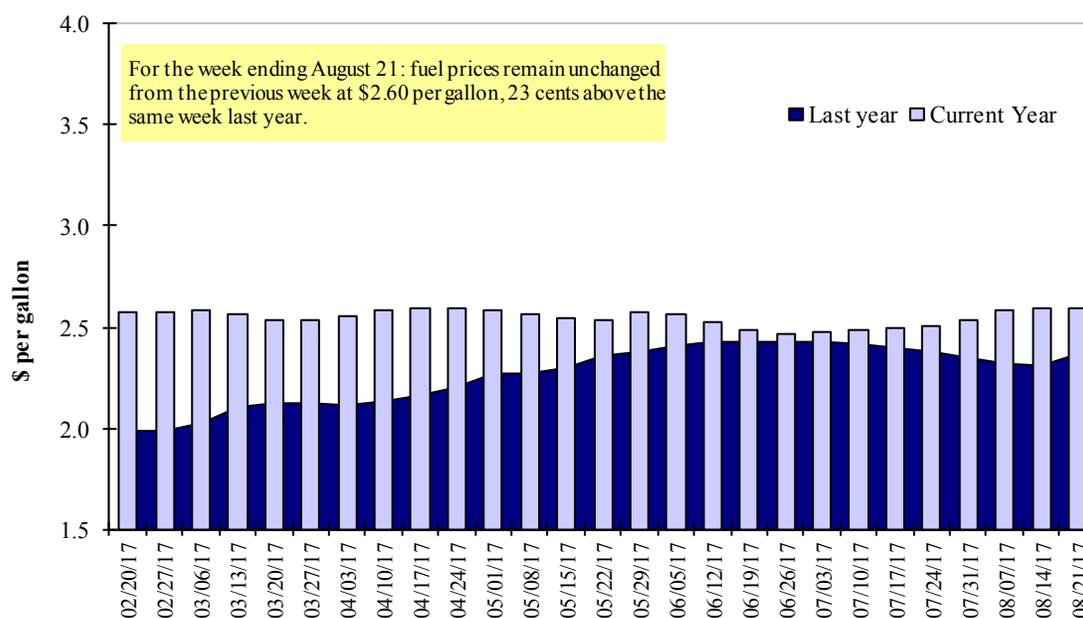
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
8/10/2017	1,664	608	1,416	1,444	102	5,234	3,483	5,108	13,824
This week year ago	2,330	621	1,953	1,093	120	6,117	6,744	4,794	17,654
Cumulative exports-marketing year²									
2016/17 YTD	2,402	521	1,580	1,323	101	5,928	52,991	56,076	114,994
2015/16 YTD	2,215	431	1,555	815	54	5,070	43,054	47,977	96,100
YTD 2016/17 as % of 2015/16	108	121	102	162	189	117	123	117	120
Last 4 wks as % of same period 2015/16	67	106	73	144	101	87	69	119	89
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

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 8/10/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2013-2015
	2017/18	2016/17	2015/16		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Mexico	2,746	13,898	12,794	9	11,204
Japan	752	12,057	10,692	13	11,284
Korea	1	5,717	3,284	74	3,931
Colombia	376	4,334	4,669	(7)	4,134
Peru	242	3,130	2,502	25	2,109
Top 5 Importers	4,117	39,136	33,940	15	32,662
Total US corn export sales	5,738	56,473	49,798	13	46,633
% of Projected	12%	100%	103%		
Change from prior week ²	672	63	167		
Top 5 importers' share of U.S. corn export sales	72%	69%	68%		70%
USDA forecast, August 2017	47,074	56,616	48,372	17	
Corn Use for Ethanol USDA forecast, August 2017	139,700	138,430	132,690	5	

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query-- <http://www.fas.usda.gov/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 8/10/2017	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2013-2015
	2017/18 Next MY	2016/17 Current MY	2015/16 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	3,490	36,664	29,423	25	29,033
Mexico	569	3,761	3,313	14	3,295
Indonesia	56	2,438	2,005	22	2,065
Japan	350	2,262	2,269	(0)	1,994
Netherlands	0	2,023	1,667	21	1,644
Top 5 importers	4,466	47,147	38,677	22	38,032
Total US soybean export sales	7,931	61,184	52,771	16	48,389
% of Projected	13%	104%	100%		
Change from prior week ²	899	453	101		
Top 5 importers' share of U.S. soybean export sales	56%	77%	73%		79%
USDA forecast, August 2017	60,627	58,583	52,916	11	

(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. (Carry over plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 8/10/2017	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2014-2016
	2017/18 Current MY	2016/17 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	985	923	7	2,620
Mexico	1,533	1,039	48	2,743
Philippines	1,247	956	31	2,395
Brazil	95	420	(77)	862
Nigeria	632	571	11	1,254
Korea	924	592	56	1,104
China	417	262	59	1,623
Taiwan	463	329	41	768
Indonesia	603	292	107	726
Colombia	278	338	(18)	635
Top 10 importers	7,177	5,722	25	14,729
Total US wheat export sales	11,161	11,186	(0)	24,485
% of Projected	42%	39%		
Change from prior week ²	634	490		
Top 10 importers' share of U.S. wheat export sales	64%	51%		60%
USDA forecast, August 2017	26,567	28,747	(8)	

(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 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 08/17/17	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	391	323	121	10,280	7,945	129	132	168	12,325
Corn	121	195	62	9,750	7,906	123	57	85	12,009
Soybeans	72	12	599	5,033	4,918	102	n/a	n/a	14,447
Total	583	530	110	25,063	20,770	121	89	132	38,782
Mississippi Gulf									
Wheat	102	114	89	3,145	2,385	132	111	93	3,480
Corn	408	367	111	21,498	20,300	106	74	79	31,420
Soybeans	493	476	104	14,445	13,806	105	66	146	35,278
Total	1,002	957	105	39,088	36,491	107	72	102	70,178
Texas Gulf									
Wheat	66	37	180	4,539	2,974	153	50	72	6,019
Corn	0	31	0	517	880	59	22	49	1,669
Soybeans	0	0	n/a	0	92	0	n/a	n/a	1,105
Total	66	68	98	5,056	3,946	128	41	67	8,792
Interior									
Wheat	54	42	130	1,227	848	145	110	119	1,543
Corn	135	134	100	5,170	4,469	116	106	121	7,197
Soybeans	99	99	100	3,117	2,612	119	97	165	4,577
Total	287	275	105	9,514	7,929	120	103	132	13,317
Great Lakes									
Wheat	0	23	0	418	530	79	31	32	1,186
Corn	11	14	78	140	332	42	17	31	584
Soybeans	35	21	164	243	159	153	53	159	910
Total	46	58	79	802	1,021	78	32	49	2,681
Atlantic									
Wheat	2	1	n/a	42	198	21	45	15	315
Corn	0	0	n/a	5	48	11	0	0	294
Soybeans	0	12	0	979	999	98	65	140	2,269
Total	2	13	12	1,025	1,245	82	43	45	2,878
U.S. total from ports²									
Wheat	614	539	114	19,650	14,880	132	99	117	24,867
Corn	674	742	91	37,080	33,935	109	67	83	53,173
Soybeans	699	620	113	23,817	22,587	105	71	157	58,587
Total	1,987	1,901	105	80,548	71,402	113	75	108	136,627

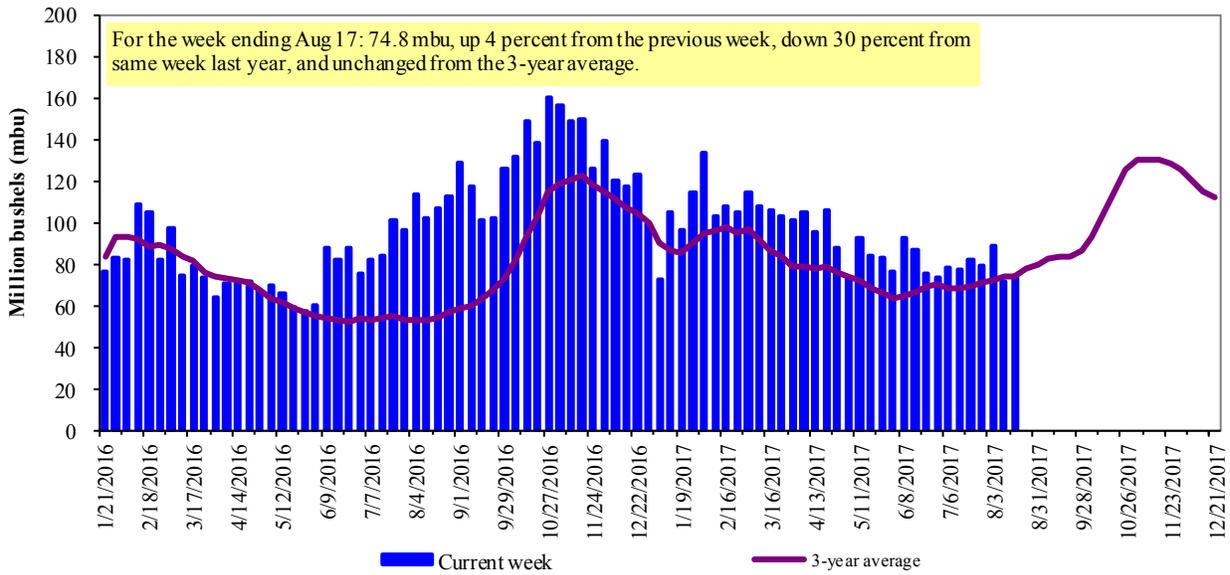
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

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

Figure 14

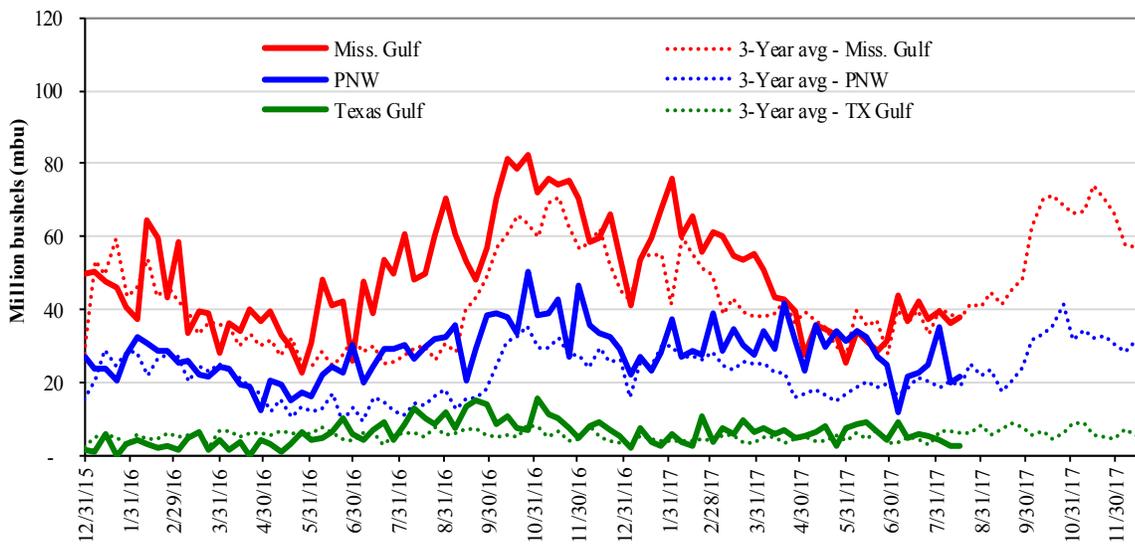
U.S. grain inspected for export (wheat, corn, and soybeans)



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

Figure 15

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



Week ending 08/17/17 inspections (mbu):		Percent change from:				
		Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Mississippi Gulf:	37.9	up 5	down 5	up 4	up 9	
PNW:	21.7	Last Year (same week):	down 24	down 76	down 33	down 27
Texas Gulf:	2.4	3-yr avg. (4-wk. mov. Avg):	up 1	down 55	down 6	up 11

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

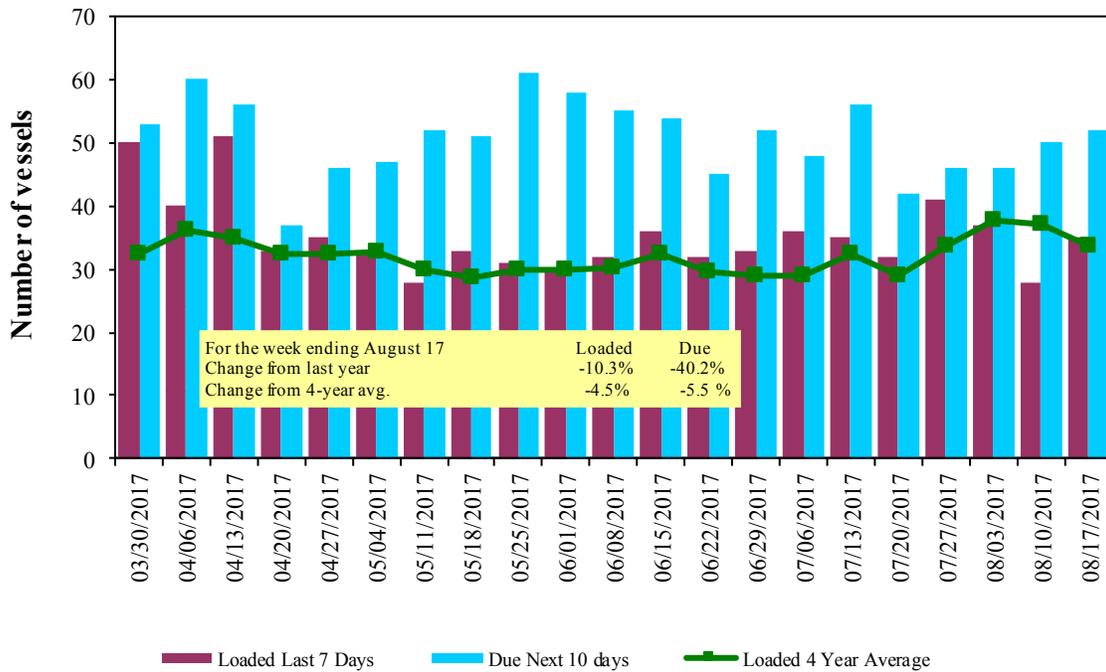
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/17/2017	33	35	52	11	n/a
8/10/2017	32	28	50	7	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

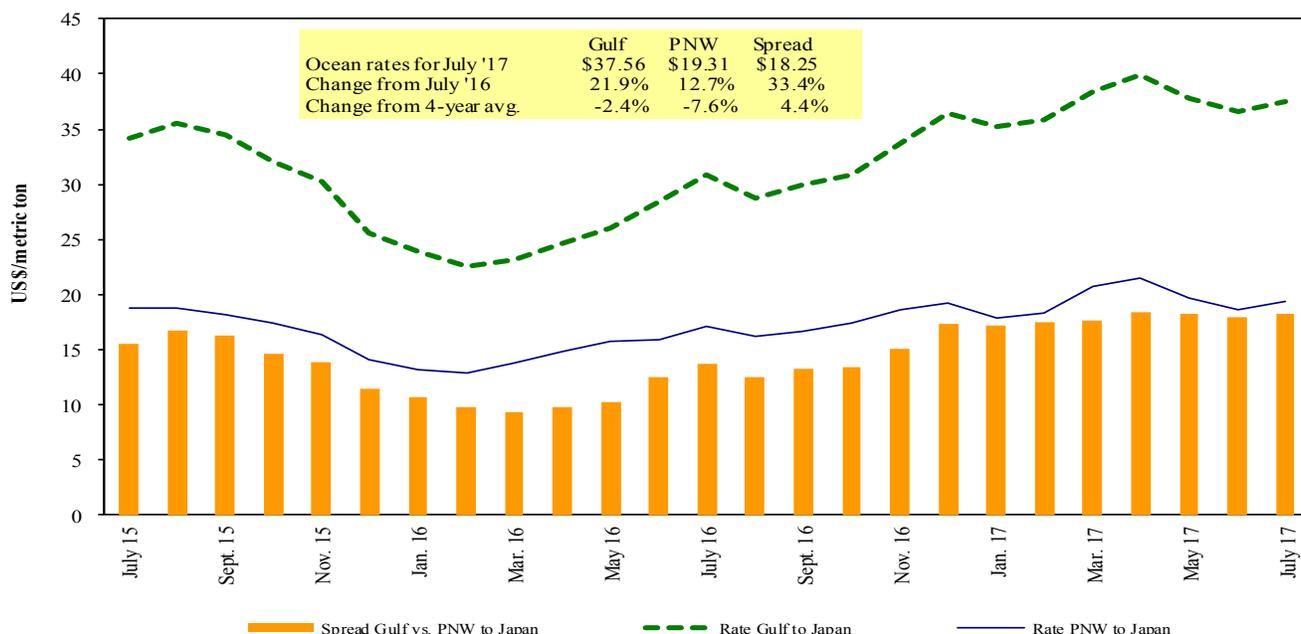
U.S. Gulf Vessel Loading Activity



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 08/19/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Aug 22/28	60,000	35.10
U.S. Gulf	China	Heavy Grain	Aug 10/20	60,000	34.50
U.S. Gulf	China	Heavy Grain	Aug 1/5	60,000	33.75
U.S. Gulf	China	Heavy Grain	Jul 20/30	60,000	32.95
U.S. Gulf	China	Heavy Grain	Jul 15/25	60,000	33.65
U.S. Gulf	Haiti	Wheat	Jul 3/13	20,000	80.00*
U.S. Gulf	Kenya	Sorghum	Aug 21/31	23,820	129.11*
PNW	Bangladesh	Wheat	Sept 29/Oct 9	13,620	58.00*
PNW	Taiwan	Wheat	Jun 9/23	48,425	29.70
Brazil	China	Heavy Grain	Aug 1/10	60,000	27.25
Brazil	China	Heavy Grain	Jul 15/30	60,000	22.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.00
Brazil	China	Heavy Grain	Jul 1/5	60,000	22.25
Brazil	China	Heavy Grain	Jun 20/30	60,000	24.00
Brazil	China	Heavy Grain	Jun 10/20	60,000	24.75
Brazil	China	Heavy Grain	May 20/30	60,000	25.50
Brazil	Iran	Heavy Grain	Jun 15/18	70,000	22.75
Brazil	Malaysia	Heavy Grain	Aug 15/24	65,000	23.75
EC S. America	China	Heavy Grain	May 20/30	60,000	29.75

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

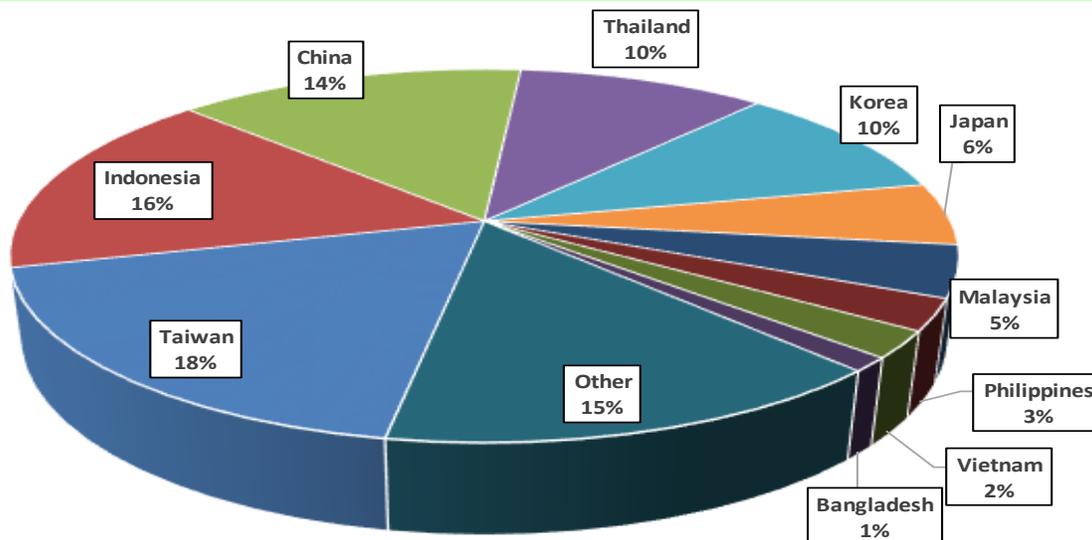
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-April 2017

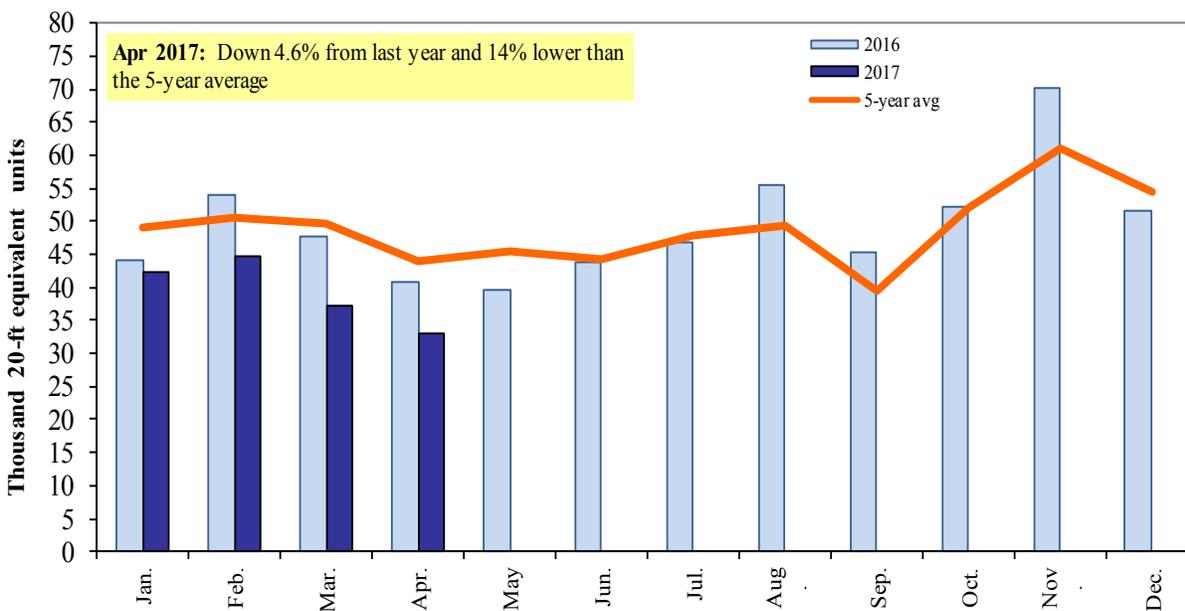


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

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

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Subscription Information: Send relevant information to GTRContactUs@ams.usda.gov for an electronic copy (*printed copies are also available upon request*).

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