



Grain Transportation Report

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

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December 20, 2018

WEEKLY HIGHLIGHTS

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Grain Inspections Increase; Wheat Highest Since 2017

For the week ending December 13, **total inspections of grain** (corn, wheat, and soybeans), for export from all major U.S. export regions, reached 2.61 million metric tons (mmt); up 15 percent from the previous week, down 17 percent from last year, and down 10 percent from the 3-year average. Inspections of wheat jumped 52 percent from the previous week, the highest since late September 2017. Demand for U.S. wheat remained strong from Asia and Latin America. Corn and soybean inspections were up 1 and 10 percent, respectively, from the previous week. Pacific Northwest grain inspections increased 24 percent from the previous week, and Mississippi Gulf inspections increased 11 percent for the same period. Outstanding export sales (unshipped) are up from the previous week for wheat, but down for corn and soybeans.

Heading into Winter, Minor Grain Barge Traffic Delays Reported

For the first half of December, ice accumulations have not been an issue on the Illinois River and lower portions of the Upper Mississippi River. The St. Louis area of the Mississippi River is operating under normal conditions; however, some dredging activity during night time hours has caused some delays. The Ohio and Lower Mississippi Rivers are experiencing high water levels, causing some delays and restrictions of barge tow sizes. For the week ending December 15, there were 816 grain barges unloaded in New Orleans, 3 percent higher than last week, but 12 percent lower than the 3-year average.

U.S. Department of Transportation Announces Recipients of \$1.5 Billion In "BUILD" Grants

Last week, the U.S. Department of Transportation (DOT) announced the recipients of the Better Utilizing Investment to Leverage Development (**BUILD**) grants. The funds span 91 infrastructure projects in 49 states and the District of Columbia. DOT Secretary Elaine Chao indicated that highway and bridge projects received the largest share (69 percent) of the total \$1.5 billion appropriated by Congress. Rail, transit, and port projects received about \$165 million, \$141 million, and \$146 million, respectively. The maximum award for this round of BUILD Transportation grants is \$25 million and, as specified in the FY 2018 Appropriations Act, no more than \$150 million can be awarded to a single State. At least 30 percent of funds must be awarded to projects located in rural areas.

Snapshots by Sector

Export Sales

For the week ending December 6, **unshipped balances** of wheat, corn, and soybeans totaled 28.3 mmt, down 17 percent from the same time last year. Net weekly **wheat export sales** were .754 mmt, up 6 percent from the previous week. Net **corn export sales** were .903 mmt, down 23 percent from the previous week. Net **soybean export sales** were .792 mmt, down 11 percent from the past week

Rail

U.S. Class I railroads originated 23,082 **grain carloads** for the week ending December 8, up 3 percent from the previous week, down 3 percent from last year, and down 3 percent from the 3-year average.

Average December shuttle **secondary railcar** bids/offers per car were \$263 below tariff for the week ending December 13, down \$147 from last week, and down \$117 from last year. Average non-shuttle secondary railcar bids/offers per car were \$0, up \$50 from last week, and down \$100 from last year.

Barge

For the week ending December 15, **barge grain movements** totaled 853,616 tons, 9 percent higher than the previous week and up 5 percent from the same period last year.

For the week ending December 15, 550 grain barges **moved down river**, 47 barges more than the previous week. There were 816 grain barges **unloaded in New Orleans**, 3 percent higher than the previous week.

Ocean

For the week ending December 13, 33 **ocean-going grain vessels** were loaded in the Gulf, 15 percent less than the same period last year. Sixty-six vessels are expected to be loaded within the next 10 days, 22 percent more than the same period last year.

For the week ending December 13, the ocean freight rate for shipping bulk grain, from the Gulf to Japan, was \$48.00 per metric ton. The cost of shipping, from the PNW to Japan, was \$25.75 per metric ton.

Fuel

For the week ending December 17, the **U.S. average diesel fuel price** decreased 4 cents, from the previous week, to \$3.121 per gallon, 22 cents above the same week last year.

Feature Article/Calendar

Precision Scheduled Railroading, Operating Ratios, and Grain Service Metrics

In September, Union Pacific Railroad (UP) announced its plans to move toward a precision scheduled railroading (PSR) operating model, with rollout beginning October 1, 2018. Norfolk Southern (NS) also recently announced it would implement a version of PSR. The operational changes by these two railroads follow a similar transition at CSX in 2017. Railroads say PSR is an approach to operations that focuses on efficiency and cutting costs through greater asset utilization. PSR reflects a broader trend in the railroad industry to reduce operating ratios (operating costs/revenue).¹ Opponents of PSR believe it results in decreased service, in the form of arbitrary reductions in delivery and pulling of trains from facilities, as a result of major reductions in locomotives, crews, and customer service personnel. Proponents of PSR believe it can deliver both greater efficiency and service to rail customers.

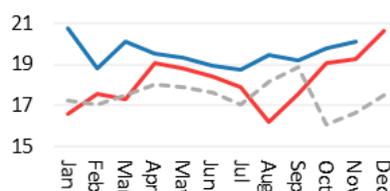
Critics of PSR and operating ratio cuts argue railroads have been too exclusively focused on cutting costs and raising rates (in part, through higher accessorial fees), and have not been focused enough on providing quality service. Shippers maintain that cutting operating ratios frequently means sacrificing service and shipper-interests for short-term investor interests. Shippers express concern that focusing too heavily on cutting ostensibly under-used assets leaves railroads, and the service they offer shippers, vulnerable to surges in rail demand resulting from unexpected market changes; setting up a “do less with less” situation over the longer term.²

In contrast, supporters of precision railroading and operating ratio cuts argue it enables them to do “more with less.” For example, part of precision railroading involves a focus on running fewer, but longer, general-purpose trains. Railroads argue doing so reduces congestion, requires less labor and fewer locomotives, and reduces car dwell time. Critics say longer trains are less safe. Supporters believe PSR and lower operating ratios mean providing both a better return on investment for shareholders, as well as better service for shippers.

This article looks at the Surface Transportation Board’s (STB) rail service metrics to assess grain rail service performance in 2018, as well as how CSX service has been affected by its transition to PSR. The article first analyzes CSX service during and after the PSR transition period, and then looks at rail service in 2018 across all Class I railroads.

The CSX Transition to Precision Scheduled Railroading

Figure 1: Average Weekly CSX Grain Train Speeds (MPH)



Source: Surface Transportation Board

Figure 2: Average Weekly CSX Terminal Dwell Times (Hours)

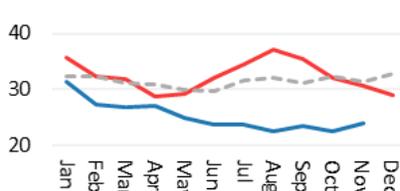
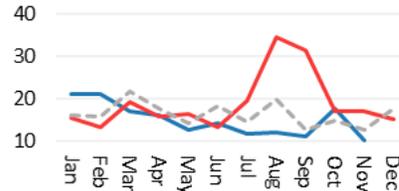


Figure 3: Average Weekly CSX Grain Origin Dwell Times (Hours)



— 2018 — 2017 - - - 2016

The late E. Hunter Harrison joined CSX in March of 2017 and immediately announced plans to implement PSR. Harrison had previously implemented the model at the Illinois Central, Canadian National (CN) and Canadian Pacific (CP). Service metrics started in 2017, at relatively normal levels, but around March, grain train speeds began declining while terminal dwell times began rising. In June, origin dwell times began rising. By August, all three metrics had reached their respective lowest/highest points in 2017, well below/above the same point in previous years. During this time, multiple shipper groups complained to STB about CSX service, including a letter from Secretary of Agriculture Sonny Perdue that emphasized the costs of poor rail service to agricultural shippers.³ Figures 1-3 support shipper’s concerns about PSR by showing the decline in CSX’s grain train speeds, increase in terminal

¹ For example, UP cited a 55 percent operating ratio as an objective of its new PSR plan, and CSX targeted a 60 percent operating ratio by 2020 through continued implementation of PSR. In its third quarter 2018 earnings call, Norfolk Southern Railway indicated intentions to overhaul operations and said it will release details on PSR adoption in February 2019. In its most recent earnings call, Kansas City Southern Railway said it is open to implementing PSR principles, noting that UP is an important interchange partner.

² See the National Grain and Feed Association [letter \(dated March 10, 2018\)](#) to the STB on rail service issues.

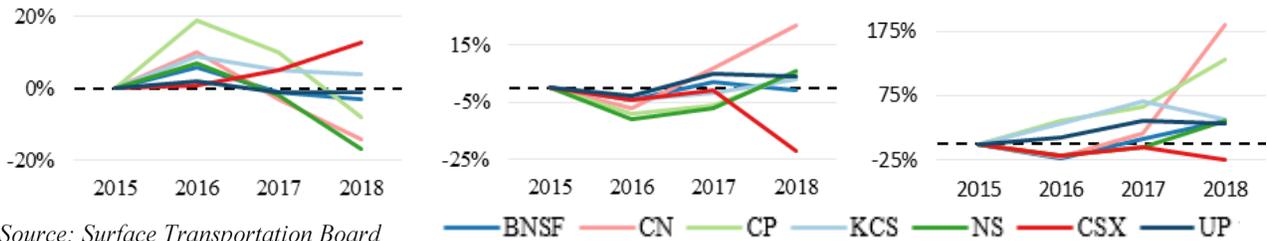
³ See Secretary Perdue’s [letter \(dated September 7, 2017\)](#) to the STB. STB’s Ex Parte 742 contains testimony from other stakeholders on CSX rail service.

dwell times, and increase in grain origin dwell times, respectively. The red line in each figure shows performance during 2017 compared to 2016 in the grey, dashed line.

CSX’s performance in 2018, however, shows significant improvement. The bright blue lines in Figures 1-3 show that after the rough transition period, lasting through October of 2017, CSX’s performance has since improved significantly. Throughout 2018, CSX’s train speeds and terminal dwell times have consistently been better than previous years. Origin dwell times took the longest to decline after the transition but have been below average since March. CSX’s January to October total grain carloads were up 8 percent from 2017, but down 4 percent from 2016.

Grain Rail Service in 2018

Figure 4: Change in Train Speeds (from 2015) Figure 5: Change in Terminal Dwell (from 2015) Figure 6: Change in Origin Dwell (from 2015)



Source: Surface Transportation Board

Until recent weeks, rail service for grain throughout 2018 has been below average compared to recent years across all Class I railroads.

Figures 4-6 show grain train speeds, terminal dwell times, and grain origin dwell times for each railroad. Each line shows the percentage change from 2015 for that railroad. In 2018, average train speeds have been low and dwell times have been high. CSX, represented by the red line in each of the charts, stands out with generally better metrics in contrast to the other railroads’ performance in 2018.

Railroads have cited labor shortages as an important factor behind 2018 service issues. At the same time, total rail traffic has been high. Poor performance in 2018 supports shipper concerns that years of operating ratio cuts may have reduced the railroads’ ability to respond to unexpected changes in the demand for rail service and the overall economy, including growth in total traffic.

Conclusions

While critics and supporters of PSR and operating ratio cuts disagree on the respective merits, the data are nuanced. On one hand, Figures 4-6 illustrate the concerns shippers have been raising over service and Wall Street-led efforts to cut operating ratios. These concerns are likely to persist if the economy stays strong and the demand for rail traffic remains high. On the other hand, CSX performance data demonstrate not all efforts to cut operating ratios always result in poorer service.

According to its metrics, CSX’s service appears to have improved (on average) since implementing PSR. However, there are important limitations to these metrics. First, the data only reflect averages and, therefore, are not reflective of outlier situations. Second, finer-grain service details are also lost in these aggregates, which can hide local problems. For instance, during the CSX transition, shippers complained CSX began only offering service at limited, specified intervals. Such changes represent worse service for those shippers but might show up as faster speeds and reduced dwell times overall. Finally, CSX grain carloads are above 2017 but below 2016 levels, adding ambiguity to whether CSX is, in fact, doing more with less.

While some railroads believe PSR can help them deliver better service and lower operating ratios, many shippers believe lower operating ratios do not always imply railroad efficiency or better customer service. Moreover, shipper testimony during the CSX transition revealed the need for railroads who are planning significant operational changes to communicate with shippers long before changes happen. An open communication channel allows shippers to express their concerns and resolve issues.

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Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail	Barge	Ocean	
		Unit Train	Shuttle	Gulf	Pacific
12/19/18	209	297	232	215	183
12/12/18	212	276	216	215	184

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 Program/AMS/USDA

n/a = not available

Table 2

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

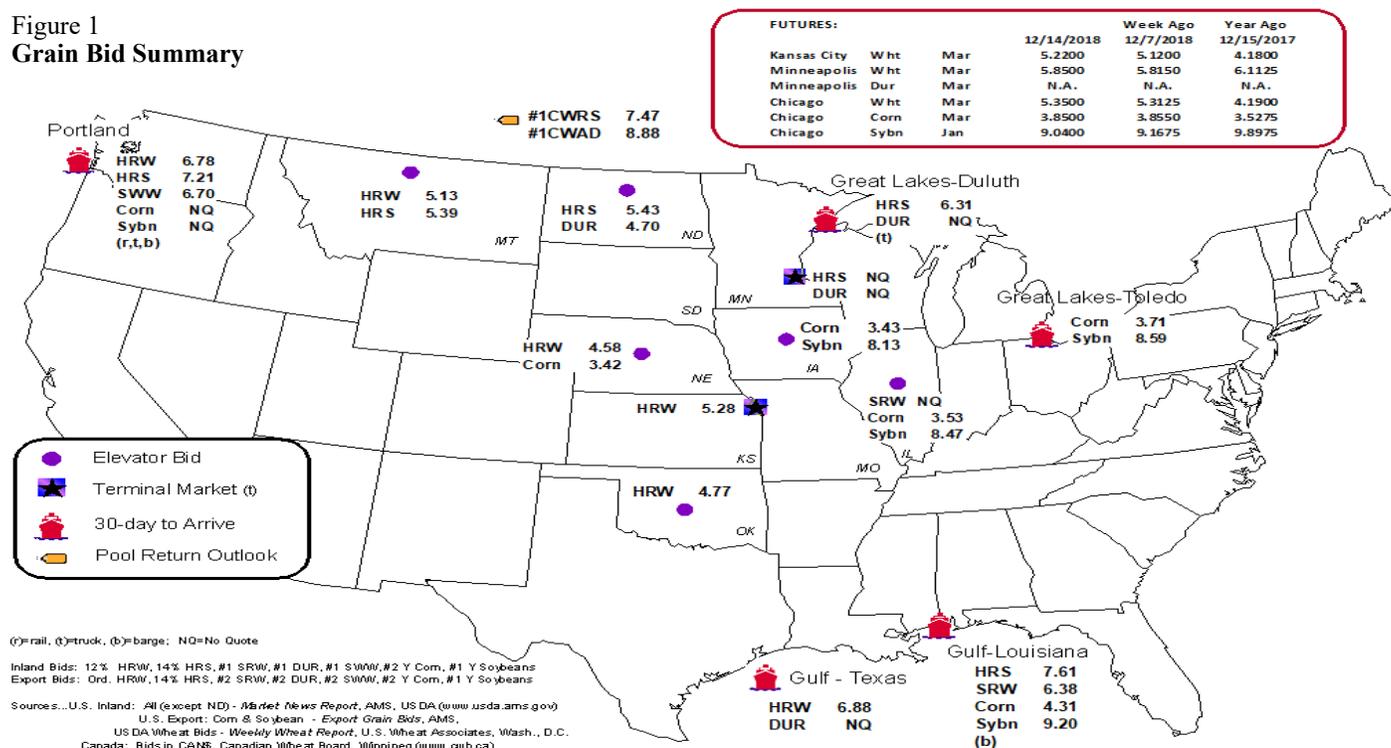
Commodity	Origin--Destination	12/14/2018	12/7/2018
Corn	IL--Gulf	-0.78	-0.77
Corn	NE--Gulf	-0.89	-0.90
Soybean	IA--Gulf	-1.07	-1.06
HRW	KS--Gulf	-1.60	-1.70
HRS	ND--Portland	-1.78	-1.84

Note: nq = no quote; n/a = not available

Source: Transportation & Marketing Program/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			
12/12/2018 ^p	1	702	6,005	339	7,047	12/8/2018	2,842
12/05/2018 ^r	220	369	4,225	320	5,134	12/1/2018	2,931
2018 YTD ^f	21,816	44,785	300,744	20,669	388,014	2018 YTD	124,404
2017 YTD ^f	28,054	74,491	276,965	21,310	400,820	2017 YTD	115,224
2018 YTD as % of 2017 YTD	78	60	109	97	97	% change YTD	108
Last 4 weeks as % of 2017 ²	54	44	78	108	74	Last 4wks % 2017	147
Last 4 weeks as % of 4-year avg. ²	20	29	77	48	62	Last 4wks % 4 yr	155
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.

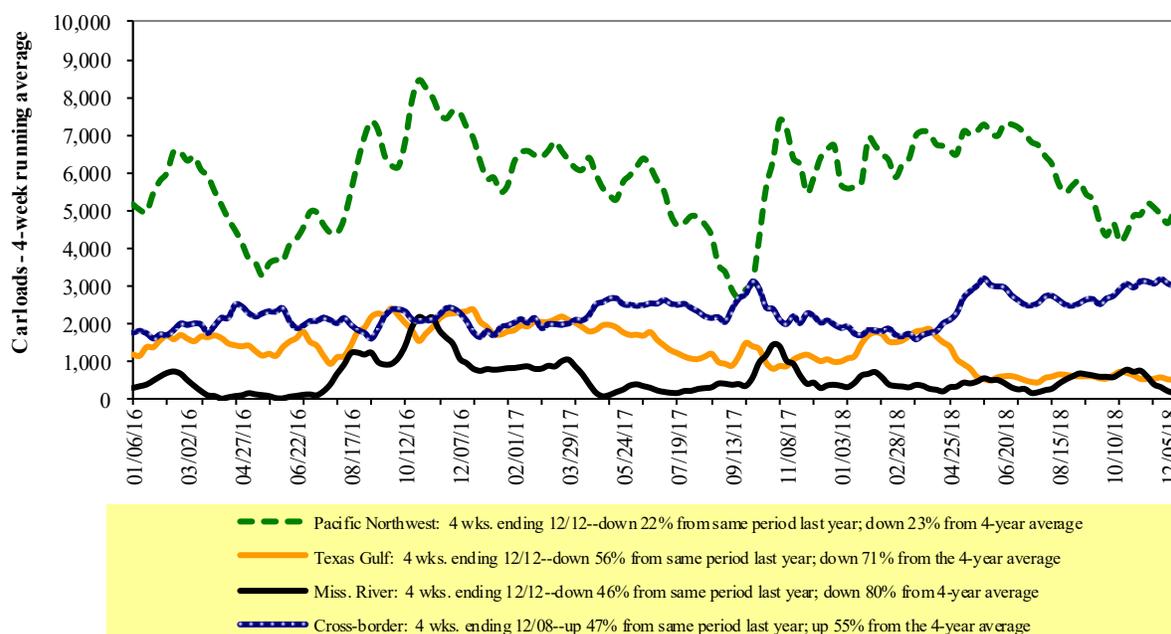
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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: 12/8/2018	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,510	2,683	13,504	1,032	4,353	23,082	4,065	4,614
This week last year	1,842	2,809	12,993	1,070	5,006	23,720	3,675	5,850
2018 YTD	94,379	124,907	600,375	45,800	253,493	1,118,954	199,789	230,973
2017 YTD	84,288	135,823	546,363	47,838	274,939	1,089,251	187,961	231,800
2018 YTD as % of 2017 YTD	112	92	110	96	92	103	106	100
Last 4 weeks as % of 2017*	90	95	102	97	98	99	119	95
Last 4 weeks as % of 3-yr avg.**	95	89	103	106	91	98	108	97
Total 2017	89,465	142,733	578,964	50,223	289,574	1,150,959	198,428	244,766

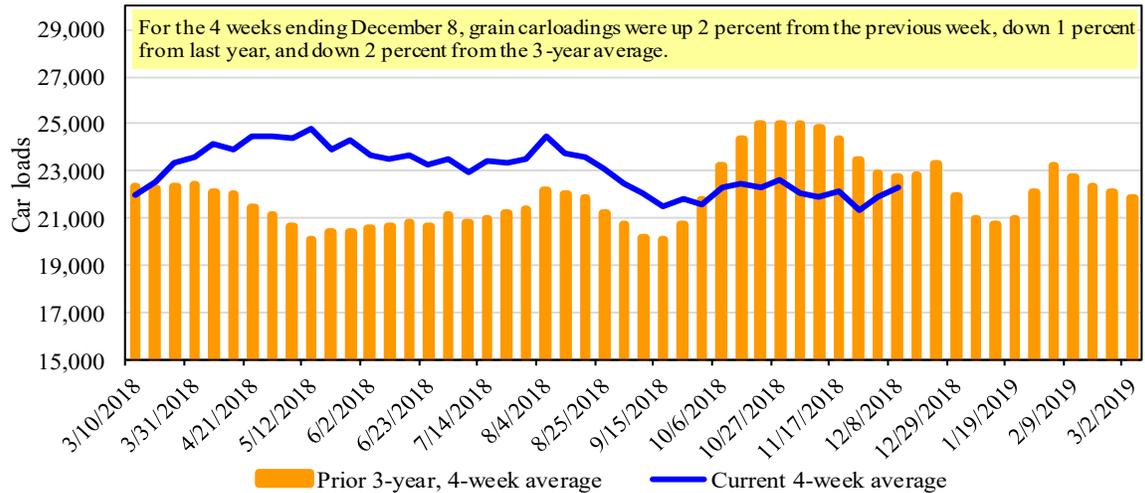
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 12/13/2018		Delivery period							
		Dec-18	Dec-17	Jan-19	Jan-18	Feb-19	Feb-18	Mar-19	Mar-18
BNSF ³	COT grain units	620	no bids	-60	0	6	no bids	6	no bids
	COT grain single-car ⁵	no offer	0	103	1	61	0	11	0
UP ⁴	GCAS/Region 1	no offer	no offer	no bid	no bids	no bid	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no bid	10	10	10	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.

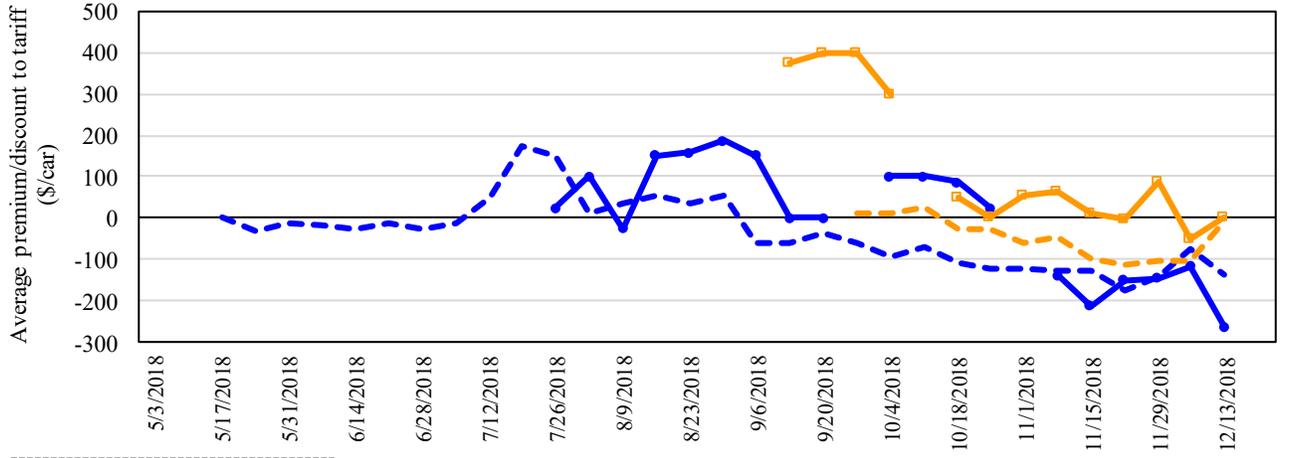
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Program/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 December 2018, Secondary Market



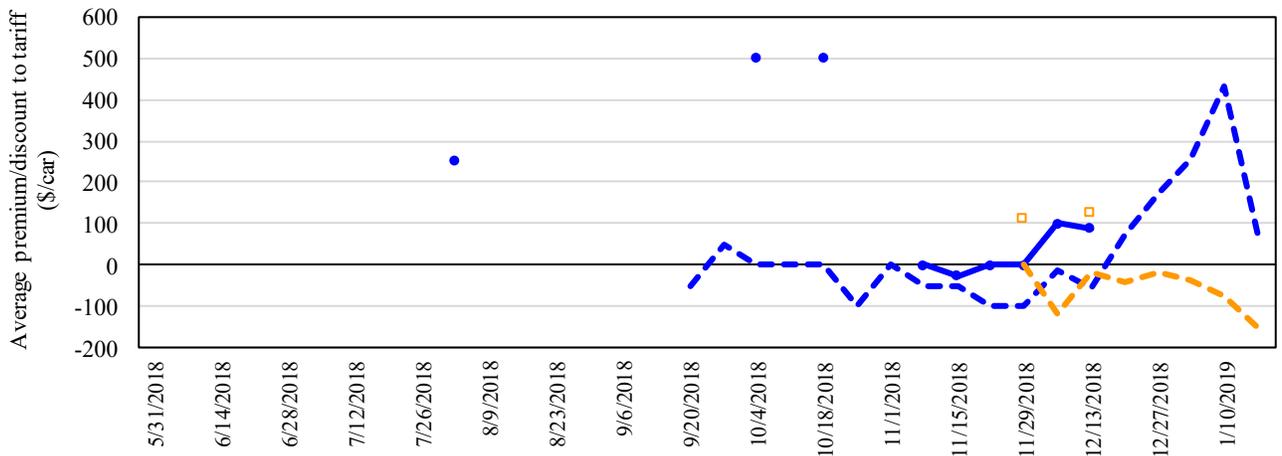
12/13/2018	BNSF	UP
Non-Shuttle	n/a	\$0
Shuttle	-\$175	-\$350

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

Average Non-shuttle bids/offers rose \$50 this week, and are \$400 below the peak.
 Average Shuttle bids/offers fell \$147 this week and are \$450 below the peak.

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

Figure 5
Bids/Offers for Railcars to be Delivered in January 2019, Secondary Market



12/13/2018	BNSF	UP
Non-Shuttle	n/a	\$125
Shuttle	\$175	\$0

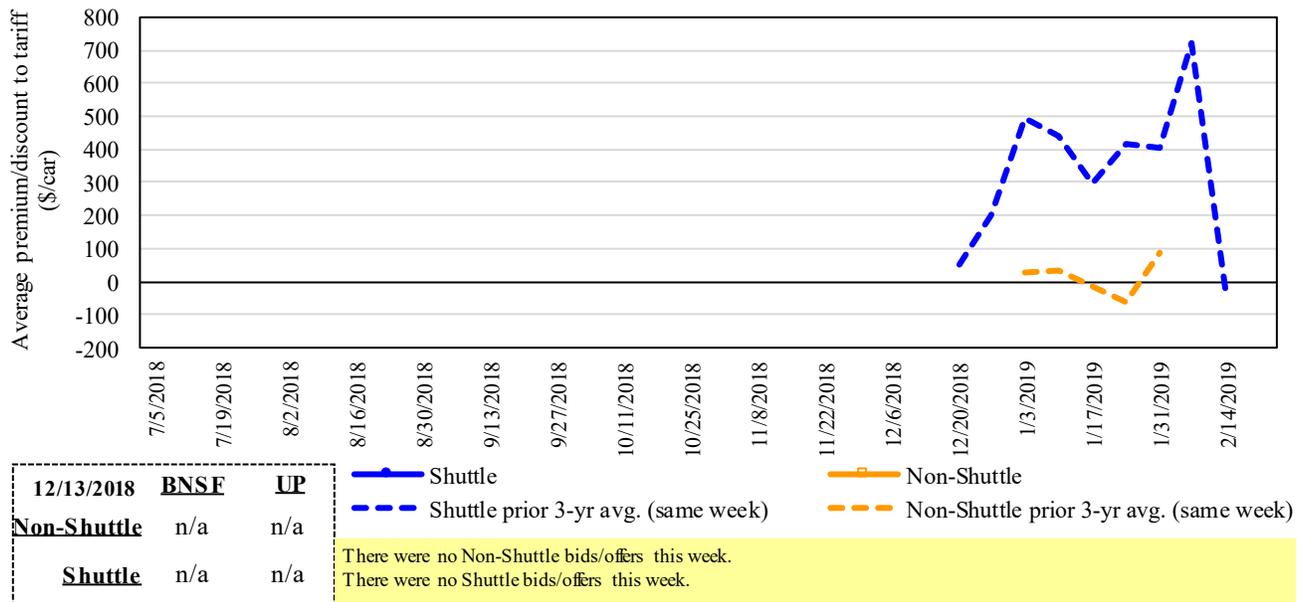
— Shuttle
 - - Shuttle prior 3-yr avg. (same week)
 — Non-Shuttle
 - - Non-Shuttle prior 3-yr avg. (same week)

There were no Non-Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are at the peak.
 Average Shuttle bids/offers fell \$13 this week and are \$413 below the peak.

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

Figure 6

Bids/Offers for Railcars to be Delivered in February 2019, Secondary Market



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

Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending:		Delivery period					
		Dec-18	Jan-19	Feb-19	Mar-19	Apr-19	May-19
Non-shuttle	12/13/2018						
	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	0	125	n/a	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
Change from same week 2017	(100)	100	n/a	n/a	n/a	n/a	
Shuttle	BNSF-GF	(175)	175	n/a	n/a	n/a	n/a
	Change from last week	(150)	(25)	n/a	n/a	n/a	n/a
	Change from same week 2017	(58)	150	n/a	n/a	n/a	n/a
	UP-Pool	(350)	0	n/a	n/a	n/a	n/a
	Change from last week	(144)	0	n/a	n/a	n/a	n/a
	Change from same week 2017	(175)	200	n/a	n/a	n/a	n/a

¹Average premium/discount to tariff, \$/car-last week

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,
n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Program/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

December, 2018	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel ²	Percent change Y/Y ⁴
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$132	\$40.86	\$1.11	4
	Grand Forks, ND	Duluth-Superior, MN	\$4,268	\$0	\$42.38	\$1.15	3
	Wichita, KS	Los Angeles, CA	\$7,175	\$0	\$71.25	\$1.94	2
	Wichita, KS	New Orleans, LA	\$4,540	\$231	\$47.38	\$1.29	2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,911	\$0	\$68.63	\$1.87	2
	Northwest KS	Galveston-Houston, TX	\$4,816	\$254	\$50.34	\$1.37	2
	Amarillo, TX	Los Angeles, CA	\$5,121	\$353	\$54.36	\$1.48	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$262	\$42.32	\$1.07	5
	Toledo, OH	Raleigh, NC	\$6,581	\$0	\$65.35	\$1.66	4
	Des Moines, IA	Davenport, IA	\$2,258	\$55	\$22.97	\$0.58	1
	Indianapolis, IN	Atlanta, GA	\$5,646	\$0	\$56.07	\$1.42	4
	Indianapolis, IN	Knoxville, TN	\$4,704	\$0	\$46.71	\$1.19	4
	Des Moines, IA	Little Rock, AR	\$3,609	\$163	\$37.46	\$0.95	2
	Des Moines, IA	Los Angeles, CA	\$5,327	\$474	\$57.61	\$1.46	4
Soybeans	Minneapolis, MN	New Orleans, LA	\$4,131	\$268	\$43.68	\$1.19	17
	Toledo, OH	Huntsville, AL	\$5,459	\$0	\$54.21	\$1.48	3
	Indianapolis, IN	Raleigh, NC	\$6,698	\$0	\$66.51	\$1.81	4
	Indianapolis, IN	Huntsville, AL	\$4,937	\$0	\$49.03	\$1.33	4
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$262	\$49.72	\$1.35	2
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$4,078	\$0	\$40.50	\$1.10	3
	Wichita, KS	Galveston-Houston, TX	\$4,296	\$0	\$42.66	\$1.16	3
	Chicago, IL	Albany, NY	\$5,896	\$0	\$58.55	\$1.59	4
	Grand Forks, ND	Portland, OR	\$5,736	\$0	\$56.96	\$1.55	2
	Grand Forks, ND	Galveston-Houston, TX	\$6,056	\$0	\$60.14	\$1.64	2
	Northwest KS	Portland, OR	\$5,912	\$416	\$62.84	\$1.71	5
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	4
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	4
	Champaign-Urbana, IL	New Orleans, LA	\$3,800	\$262	\$40.33	\$1.02	5
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	5
	Des Moines, IA	Amarillo, TX	\$4,060	\$205	\$42.35	\$1.08	5
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	4
	Council Bluffs, IA	Stockton, CA	\$5,000	\$0	\$49.65	\$1.26	4
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	3
	Minneapolis, MN	Portland, OR	\$5,800	\$0	\$57.60	\$1.57	3
	Fargo, ND	Tacoma, WA	\$5,650	\$0	\$56.11	\$1.53	3
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$302	\$50.41	\$1.37	3
	Toledo, OH	Huntsville, AL	\$4,634	\$0	\$46.02	\$1.25	6
	Grand Island, NE	Portland, OR	\$5,710	\$426	\$60.93	\$1.66	3

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

Date: December, 2018			Fuel			Percent	
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,284	\$0	\$74.43	\$2.02	-2
	OK	Cuautitlan, EM	\$6,743	\$181	\$70.75	\$1.92	3
	KS	Guadalajara, JA	\$7,371	\$441	\$79.82	\$2.17	3
	TX	Salinas Victoria, NL	\$4,329	\$110	\$45.36	\$1.23	2
Corn	IA	Guadalajara, JA	\$8,528	\$407	\$91.30	\$2.32	4
	SD	Celaya, GJ	\$7,880	\$0	\$80.51	\$2.04	2
	NE	Queretaro, QA	\$8,207	\$377	\$87.70	\$2.23	4
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	2
	MO	Tlalnepantla, EM	\$7,573	\$367	\$81.13	\$2.06	5
	SD	Torreón, CU	\$7,480	\$0	\$76.43	\$1.94	2
Soybeans	MO	Bojay (Tula), HG	\$8,284	\$377	\$88.49	\$2.41	4
	NE	Guadalajara, JA	\$8,842	\$411	\$94.54	\$2.57	3
	IA	El Castillo, JA	\$9,110	\$0	\$93.08	\$2.53	2
	KS	Torreón, CU	\$7,714	\$305	\$81.93	\$2.23	5
Sorghum	NE	Celaya, GJ	\$7,527	\$377	\$80.76	\$2.05	4
	KS	Queretaro, QA	\$8,000	\$226	\$84.05	\$2.13	4
	NE	Salinas Victoria, NL	\$6,633	\$182	\$69.62	\$1.77	4
	NE	Torreón, CU	\$6,962	\$292	\$74.12	\$1.88	4

¹Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

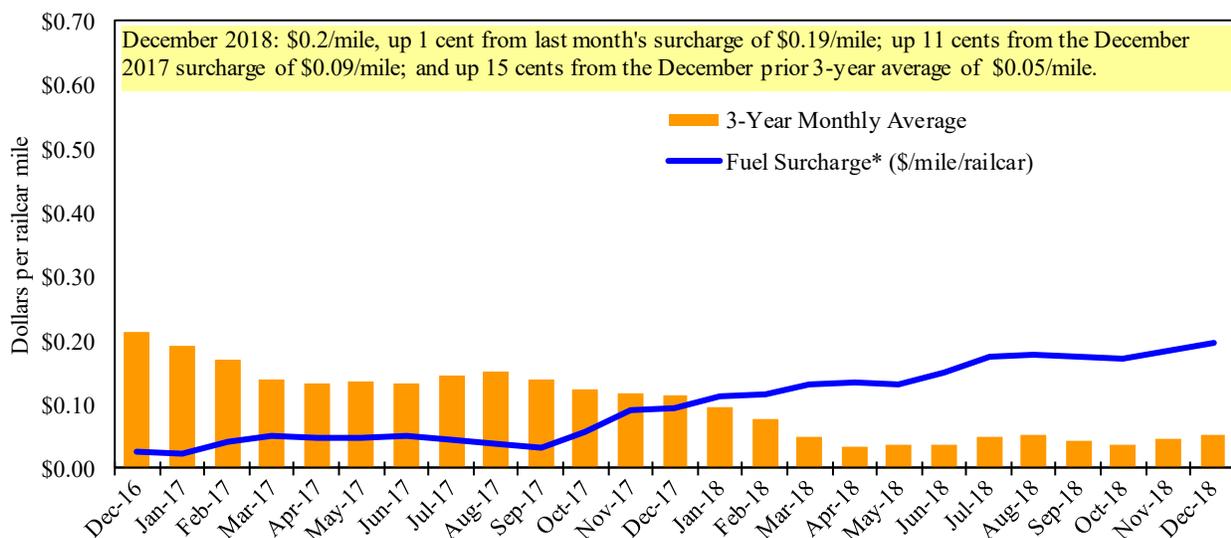
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage change calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

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

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

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Program/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	12/18/2018	-	-	450	300	400	400	270
	12/11/2018	-	-	413	340	300	300	280
\$/ton	12/18/2018	-	-	20.88	11.97	18.76	16.16	8.48
	12/11/2018	-	-	19.16	13.57	14.07	12.12	8.79
Current week % change from the same week:								
	Last year	-	-	62	35	49	49	47
	3-year avg. ²	-	-	65	55	67	70	58
Rate ¹	January	-	-	408	273	338	338	258
	March	-	-	388	268	300	300	245

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" n/a due to closure

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.

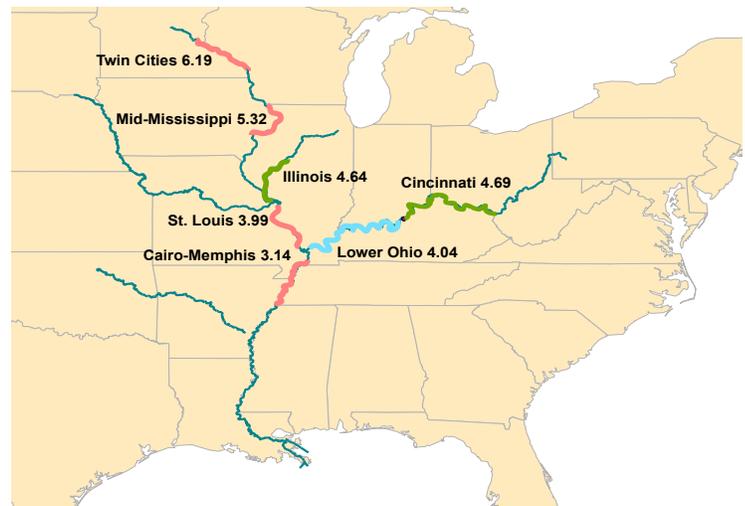
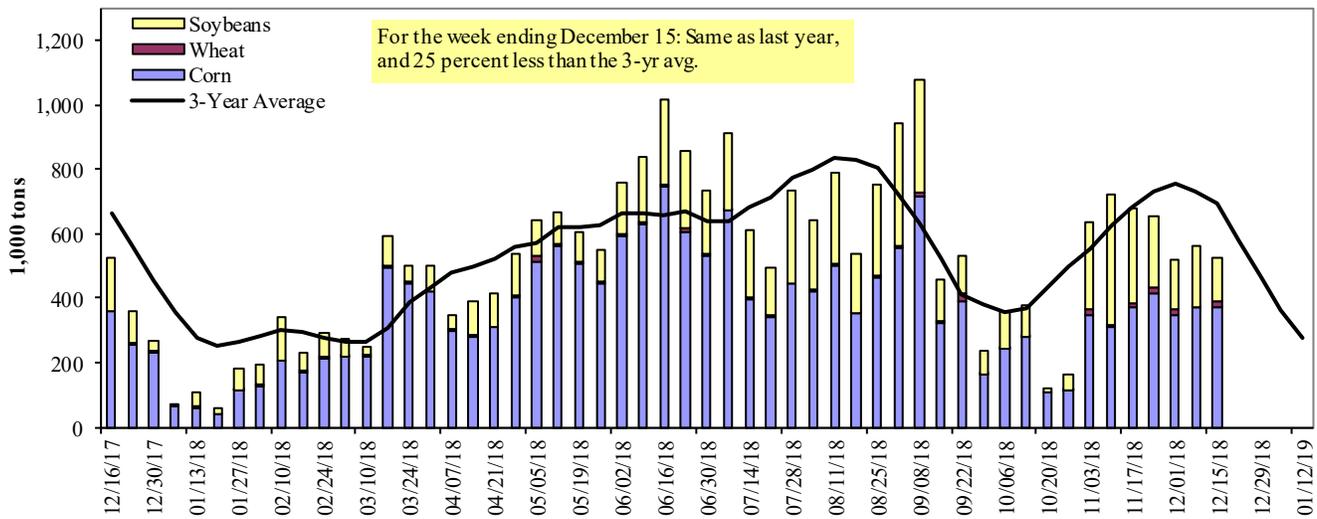


Figure 10

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 12/15/2018	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	2	0	2
Winfield, MO (L25)	159	8	54	9	230
Alton, IL (L26)	366	11	125	12	515
Granite City, IL (L27)	374	14	136	14	539
Illinois River (L8)	203	0	56	0	260
Ohio River (OLMSTED)	118	15	130	0	263
Arkansas River (L1)	0	8	43	0	52
Weekly total - 2018	492	38	310	14	854
Weekly total - 2017	404	16	380	10	810
2018 YTD ¹	22,562	1,619	12,355	130	36,666
2017 YTD	21,618	2,139	15,580	353	39,690
2018 as % of 2017 YTD	104	76	79	37	92
Last 4 weeks as % of 2017 ²	104	202	77	54	92
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.

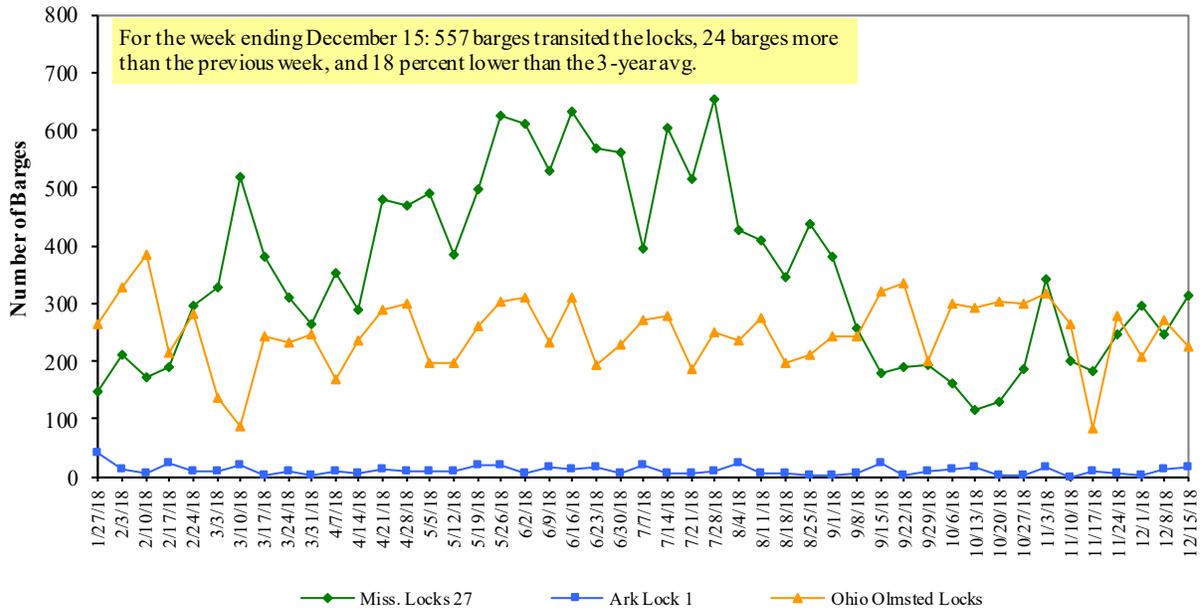
² As a percent of same period in 2017.

Note: 1. Total may not add exactly, due to rounding.

2. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

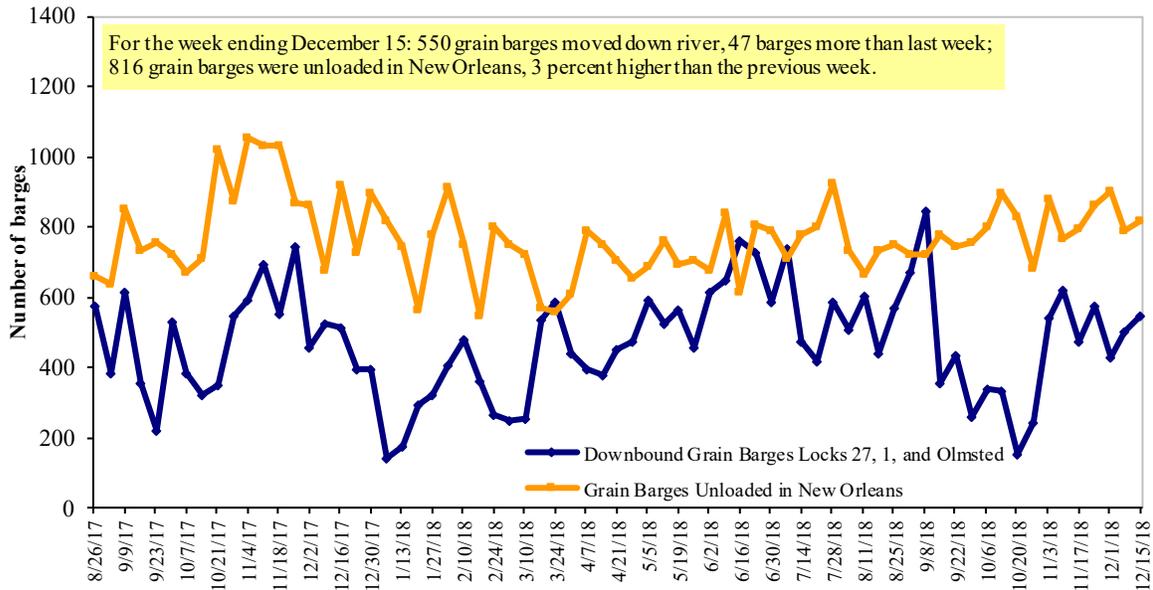
Source: U.S. Army Corps of Engineers

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



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 12/17/2018 (US \$/gallon)

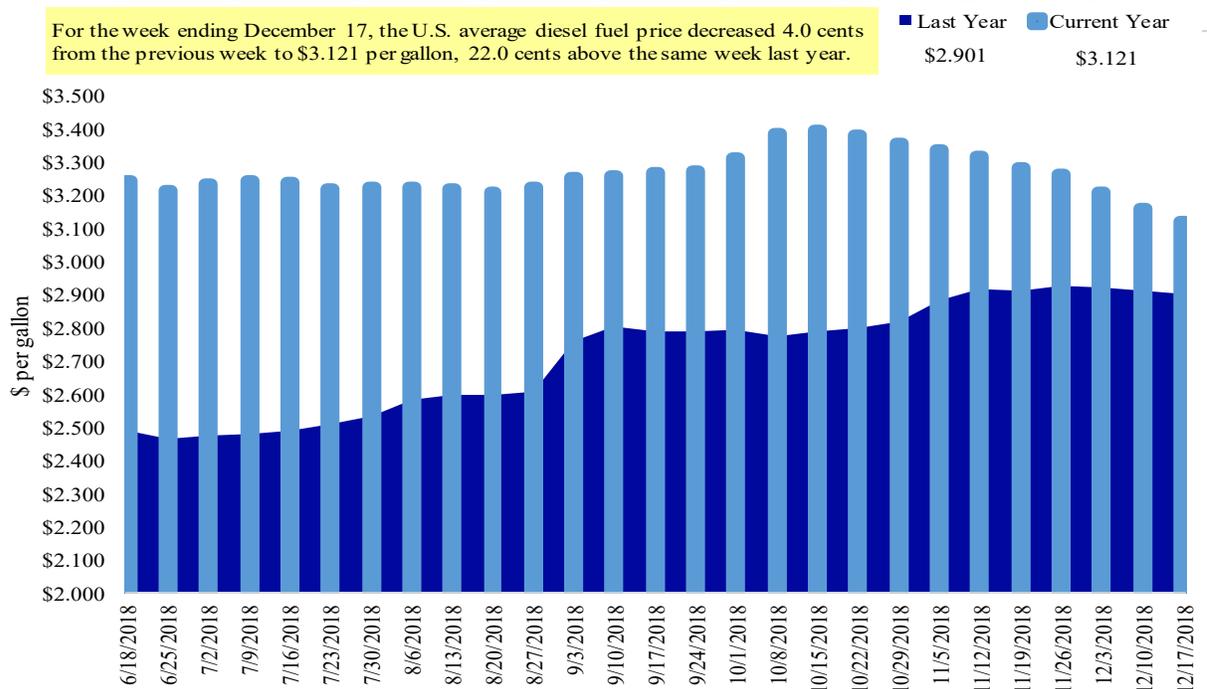
Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.165	-0.029	0.268
	New England	3.276	-0.019	0.352
	Central Atlantic	3.342	-0.026	0.282
	Lower Atlantic	3.021	-0.032	0.243
II	Midwest	3.018	-0.048	0.165
III	Gulf Coast	2.900	-0.034	0.203
IV	Rocky Mountain	3.178	-0.061	0.220
V	West Coast	3.604	-0.048	0.277
	West Coast less California	3.313	-0.044	0.269
	California	3.835	-0.052	0.283
Total	U.S.	3.121	-0.040	0.220

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

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									
12/6/2018	1,801	888	1,845	1,114	140	5,789	11,930	10,626	28,346
This week year ago	2,146	560	1,706	1,267	59	5,738	14,989	13,493	34,220
Cumulative exports-marketing year²									
2018/19 YTD	3,146	1,221	3,269	2,667	266	10,568	15,721	14,314	40,603
2017/18 YTD	5,024	1,112	3,227	2,764	211	12,337	8,777	24,161	45,276
YTD 2018/19 as % of 2017/18	63	110	101	97	126	86	179	59	90
Last 4 wks as % of same period 2017/18	72	137	108	90	254	95	79	83	83
2017/18 Total	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for corn, soybeans, and 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 12/06/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-year avg 2015-2017
	2018/19	2017/18		
	Current MY	Last MY		
	- 1,000 mt -			
Mexico	8,730	8,947	(2)	13,691
Japan	5,386	3,952	36	11,247
Korea	2,219	1,015	119	4,754
Colombia	1,699	1,675	1	4,678
Peru	1,235	1,442	(14)	2,975
Top 5 Importers	19,268	17,031	13	37,344
Total US corn export sales	27,651	23,766	16	53,184
% of Projected	44%	38%		
Change from prior week²	903	867		
Top 5 importers' share of U.S. corn export sales	70%	72%		70%
USDA forecast, December 2018	62,341	62,036	0	
Corn Use for Ethanol USDA forecast, December 2018	142,240	142,367	(0)	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2017/18 - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query-- <http://www.fas.usda.gov/esrquery/>. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales.

³ FAS Marketing Year Ranking Reports - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 12/06/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg. 2015-2017
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
China	524	21,529	(98)	31,228
Mexico	3,420	1,924	78	3,716
Indonesia	833	713	17	2,250
Japan	1,180	1,121	5	2,145
Netherlands	1,131	586	93	2,209
Top 5 importers	7,087	25,874	(73)	41,549
Total US soybean export sales	24,941	37,654	(34)	55,113
% of Projected	48%	65%		
Change from prior week ²	792	1,382		
Top 5 importers' share of U.S. soybean export sales	28%	69%		75%
USDA forecast, December 2018	51,771	58,011	89	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2017/18 - 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 12/06/2018	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2015-2017
	2018/19 Current MY	2017/18 Last MY		
	- 1,000 mt -			- 1,000 mt -
Mexico	2,003	2,205	(9)	2,781
Japan	1,949	2,006	(3)	2,649
Philippines	2,269	2,070	10	2,441
Korea	1,104	1,224	(10)	1,257
Nigeria	840	809	4	1,254
Indonesia	626	856	(27)	1,076
Taiwan	702	852	(18)	1,066
China	0	782	(100)	944
Colombia	427	221	93	714
Thailand	754	537	40	618
Top 10 importers	10,673	11,561	(8)	14,800
Total US wheat export sales	16,357	18,075	(10)	22,869
% of Projected	60%	74%		
Change from prior week ²	754	589		
Top 10 importers' share of U.S. wheat export sales	65%	64%		65%
USDA forecast, December 2018	27,248	24,550	11	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports for 2017/18 - 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 12/13/18	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	389	286	136	12,685	14,332	89	99	133	14,805
Corn	272	179	152	19,381	10,480	185	536	318	10,928
Soybeans	83	135	61	7,719	12,704	61	10	11	13,246
Total	744	600	124	39,785	37,517	106	73	80	38,978
Mississippi Gulf									
Wheat	97	64	152	3,764	4,122	91	143	115	4,198
Corn	466	541	86	32,717	28,083	117	131	126	28,690
Soybeans	794	621	128	26,987	31,280	86	82	72	32,911
Total	1,357	1,225	111	63,468	63,485	100	98	88	65,800
Texas Gulf									
Wheat	146	0	n/a	3,001	6,143	49	103	76	6,354
Corn	0	29	0	730	733	100	87	44	733
Soybeans	0	0	n/a	69	292	23	0	0	292
Total	146	29	506	3,800	7,168	53	79	50	7,379
Interior									
Wheat	39	60	64	1,586	1,676	95	119	151	1,727
Corn	131	112	117	8,437	8,532	99	88	111	8,758
Soybeans	94	104	91	6,516	5,308	123	97	115	5,508
Total	264	277	95	16,539	15,516	107	94	117	15,993
Great Lakes									
Wheat	48	63	77	872	686	127	162	134	711
Corn	0	0	n/a	404	192	210	0	0	192
Soybeans	0	20	0	1,172	847	138	200	121	890
Total	48	82	58	2,448	1,724	142	176	116	1,793
Atlantic									
Wheat	0	0	n/a	69	46	149	0	0	46
Corn	0	0	n/a	133	32	412	101	241	32
Soybeans	55	52	106	1,992	1,867	107	85	73	2,001
Total	55	52	106	2,194	1,946	113	85	71	2,079
U.S. total from ports*									
Wheat	718	473	152	21,977	27,005	81	109	119	27,841
Corn	869	861	101	61,803	48,052	129	154	147	49,333
Soybeans	1,026	931	110	44,454	52,298	85	62	57	54,847
Total	2,613	2,265	115	128,234	127,355	101	90	87	132,021

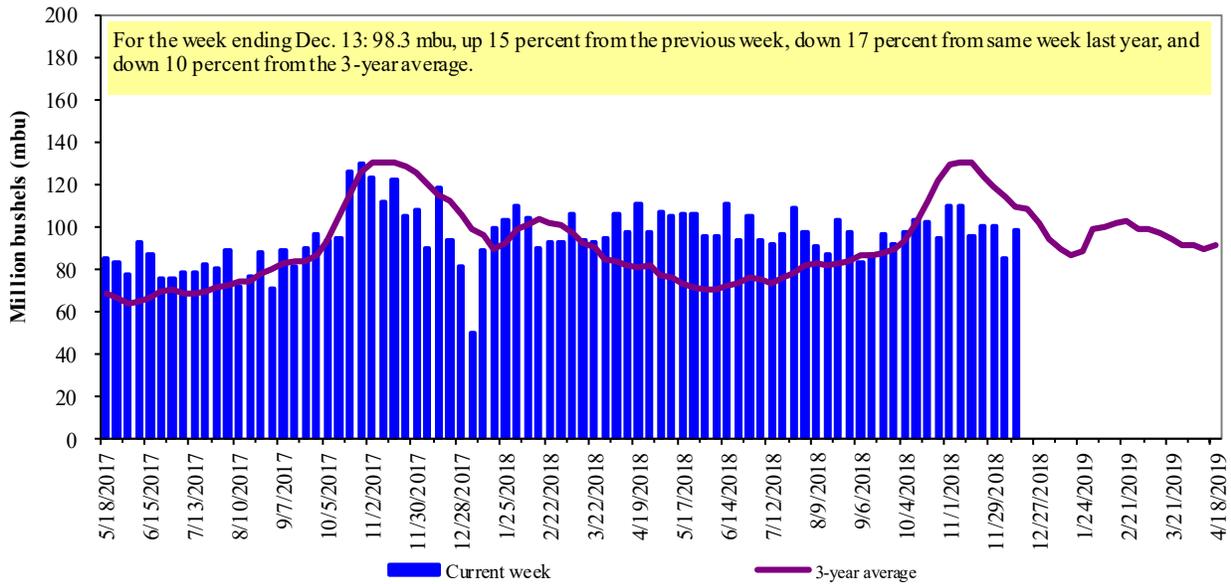
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

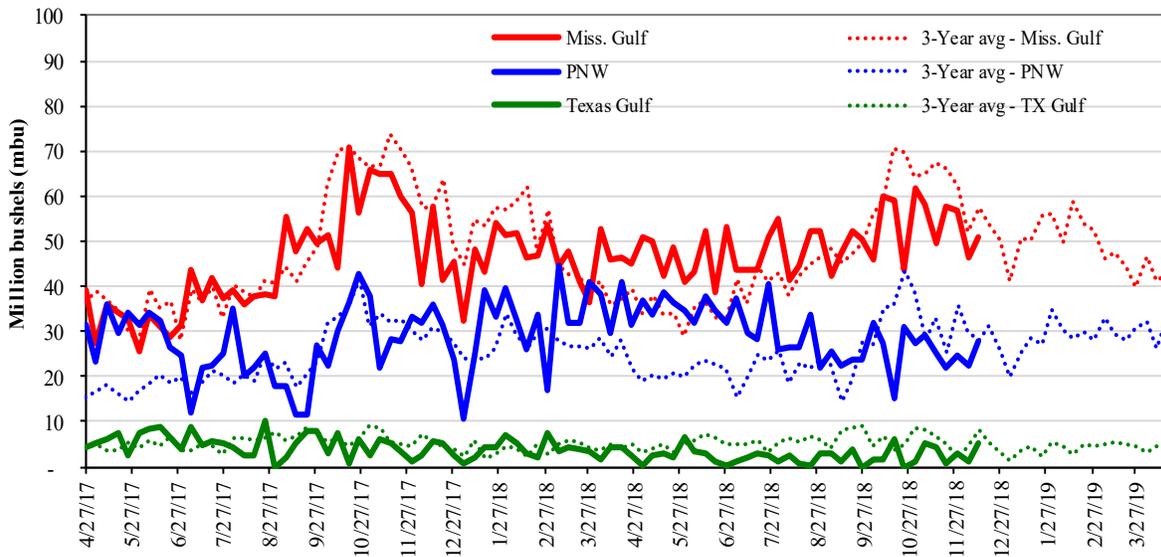


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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 12/13/18 inspections (mbu):		Percent change from:			
Mississippi Gulf:	51.1	Last Week:	up 10	up 373	up 19
PNW:	28.0	Last Year (same week):	down 11	down 8	down 11
Texas Gulf:	5.4	3-yr avg. (4-wk. mov. Avg):	down 14	up 7	down 12
					down 6

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

Ocean Transportation

Table 17

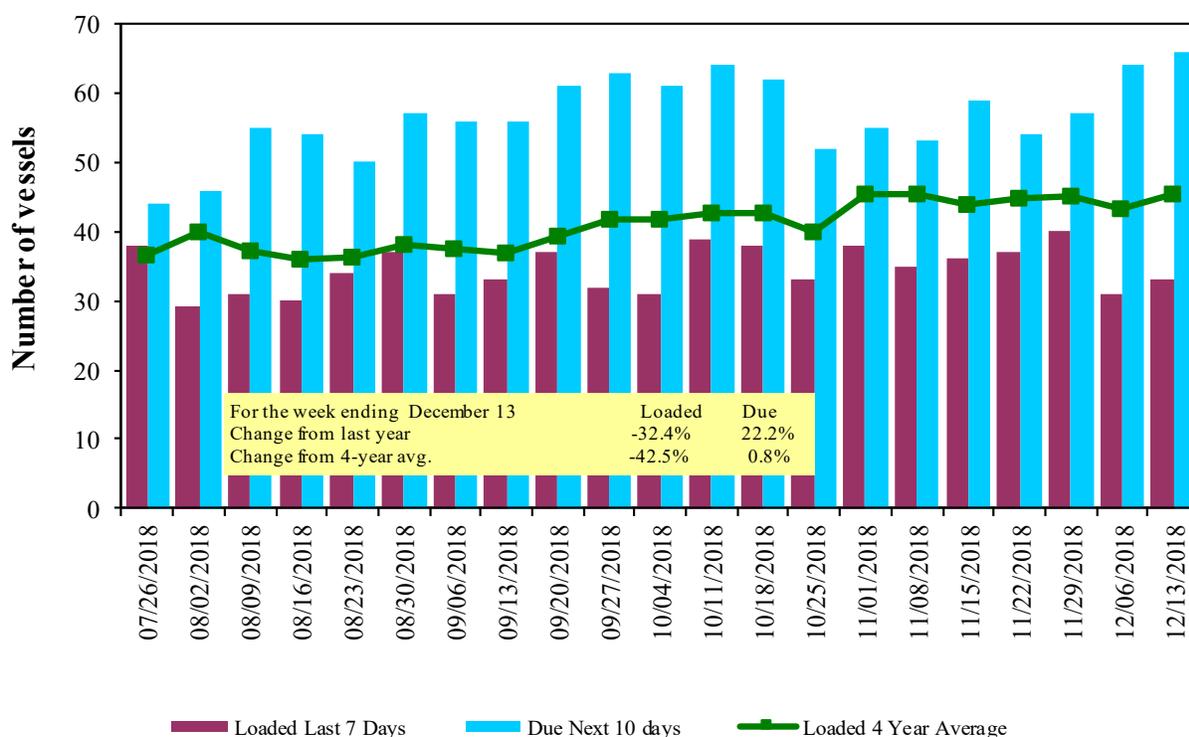
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/13/2018	23	33	66	15
12/6/2018	26	31	64	18
2017 range	(25..66)	(28..54)	(37..87)	(5..44)
2017 avg.	46	38	56	20

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

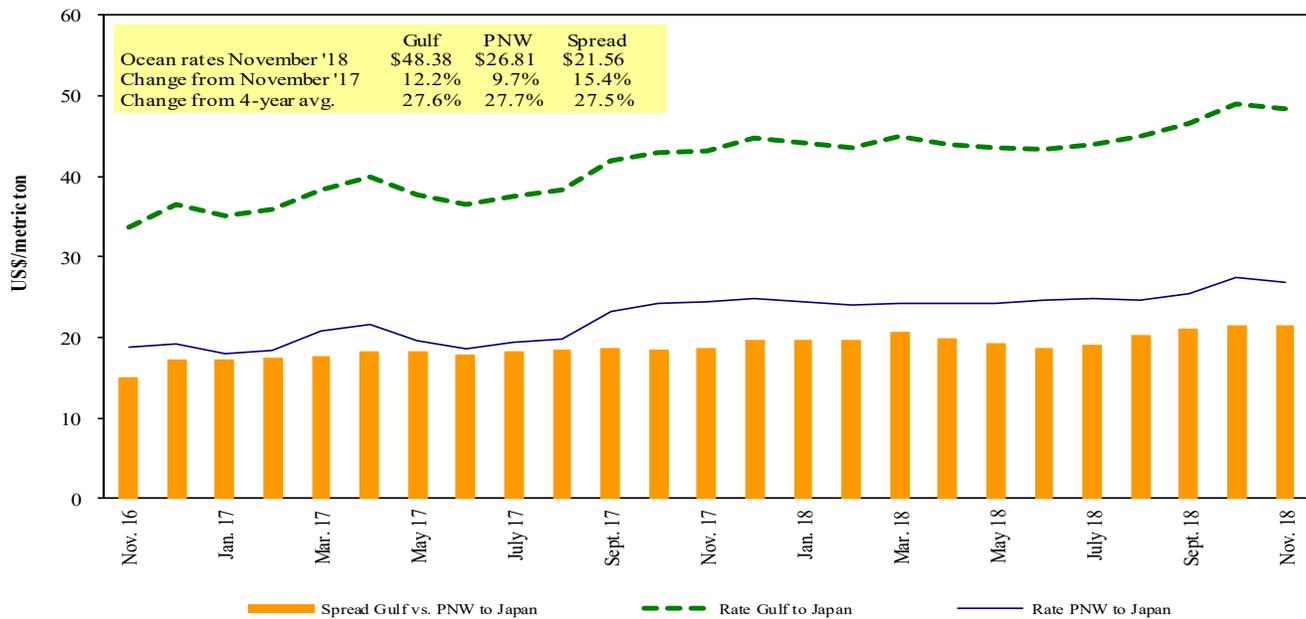
U.S. Gulf Vessel Loading Activity



Source: Transportation & Marketing Program/AMS/USDA
 U.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 12/15/2018

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Djibouti	Wheat	Dec 27/Jan 7	9,800	113.11*
U.S. Gulf	Pt. Sudan	Sorghum	Dec 7/17	30,430	71.88*
U.S. Gulf	Djibouti	Wheat	Nov 2/12	21,470	85.44*
U.S. Gulf	Djibouti	Wheat	Oct 1/15	25,340	77.65*
U.S. Gulf	Honduras	Soybean Meal	Oct 1/10	12,500	85.00*
PNW	Taiwan	Heavy Grain	Sep 15/Oct 31	63,000	25.00
Brazil	China	Heavy Grain	Dec 15/20	60,000	37.50
Brazil	China	Heavy Grain	Dec 1/10	60,000	36.25
Brazil	China	Heavy Grain	Nov 20/30	60,000	38.00
Brazil	China	Heavy Grain	Nov 1/10	60,000	34.00
Brazil	China	Heavy Grain	Oct 5/15	60,000	33.75
Brazil	China	Heavy Grain	Sep 25/30	60,000	34.50
Brazil	China	Heavy Grain	Sep 10/20	60,000	35.75
Brazil	China	Heavy Grain	Aug 21/30	60,000	36.00
Brazil	China	Heavy Grain	Aug 18/28	60,000	36.00
Brazil	Malaysia	Heavy Grain	Aug 17/24	65,000	31.00
Brazil	S.Korea	Heavy Grain	Nov 5/10	66,000	43.00

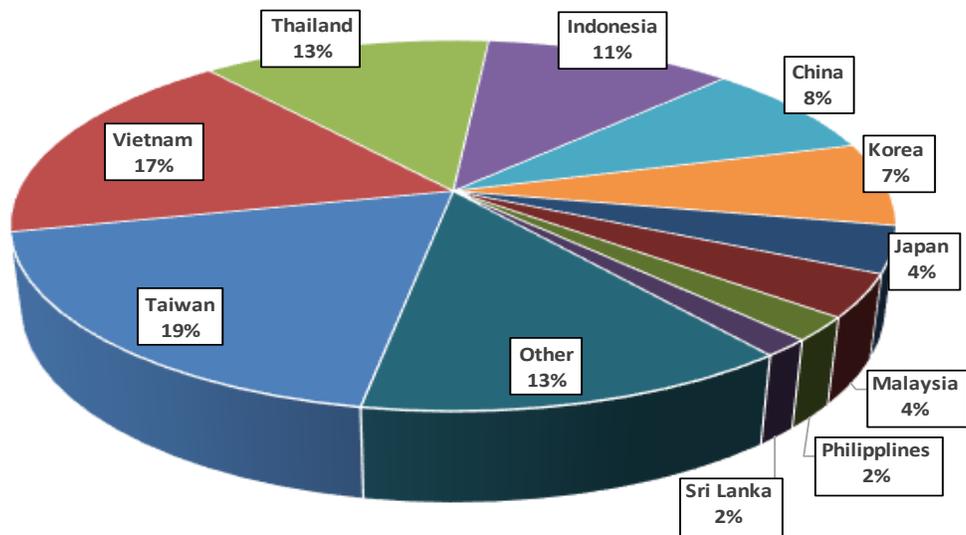
Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicated; op = option

*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.

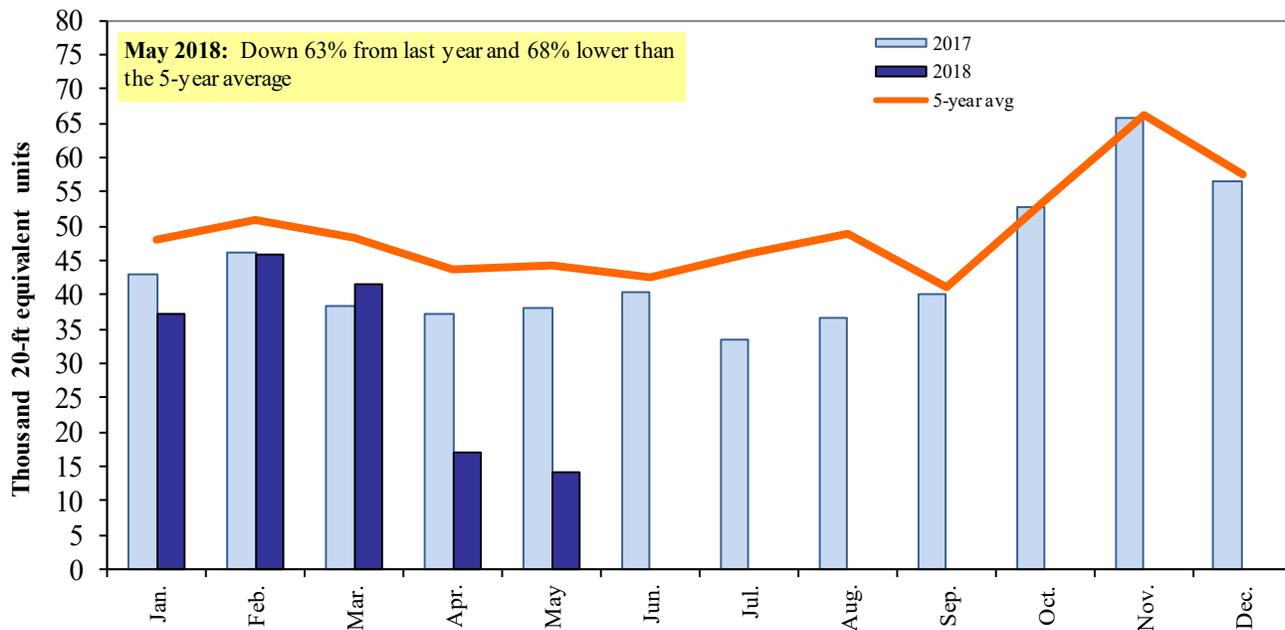
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-May 2018



Service (PIERS) data

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

Figure 19
Monthly Shipments of Containerized Grain to Asia



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

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

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