

Grain Transportation Report

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

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December 28, 2017

WEEKLY HIGHLIGHTS

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Cold Weather May Impact Barge Logistics

Much of the central and eastern United States is experiencing extremely cold weather and sub-freezing temperatures that may form significant ice accumulations on the Upper Mississippi and Illinois Rivers. The ice formations can restrict lock transit and narrow navigation channels. As a result of the freeze-up, river levels have dropped, especially at St. Louis, MO, where the river gage is forecast to drop from 2.0 feet on December 26 to -2.2 feet by January 4. Gage height is a measurement of river elevation the U.S. Army Corps of Engineers (Corps) uses at various locations on individual rivers and refers to the number of feet above or below a reference point on the river bank. It does not refer to the depth of the river and varies by location. The Corps, U.S. Coast Guard and river representatives have formed a joint committee that places restrictions (e.g., depth of draft for barges) on river traffic when the gage at St. Louis declines to -3.5 feet. In the event of possible extreme low water levels, the Corps has procedures to release water from upstream dams that have the potential to increase water levels.

Soybean, Wheat, and Corn Inspections All Decline from Previous Week

For the week ending December 21, total inspections of grain (corn, wheat, and soybeans) for export from all major U.S. export regions fell to 2.47 million metric tons (mmt), down 22 percent from the previous week, down 25 percent from the same time last year, and down 18 percent from the 3-year average. The decrease in total grain inspections consisted of a 28 percent decline in soybean inspections, a 21 percent decline in wheat inspections, and a 4 percent decline in corn inspections. Mississippi Gulf grain inspections declined 30 percent, and Pacific Northwest (PNW) inspections declined 15 percent.

Transportation Board Annual Meeting: January 7 to 11

The [Transportation Research Board's 97th Annual Meeting](#) will be held January 7-11, 2018 in Washington, DC. The meeting program covers all transportation modes and has over 5,000 presentations in nearly 800 sessions and workshops. These sessions and workshops address topics of interest to policy makers, administrators, practitioners, researchers, and representatives of government, industry, and academic institutions. A number of presentations focus on agricultural and grain transportation, including those organized under the following sessions (among others): "From Farm to Table: Multimodal Opportunities and Challenges of Moving the World's Food," "Trade, Food, and Freight—How Changing Trends in Production and Consumption Affect Movement of Food Exports and Imports," and "Agriculture Commodity Data: Challenges and Applications."

Snapshots by Sector

Export Sales

For the week ending December 14 **unshipped balances** of wheat, corn, and soybeans totaled 35.5 mmt, down 18 percent from the same time last year. Net weekly **wheat export sales** were .796 mmt, up 35 percent from the previous week. Net **corn export sales** were 1.6 mmt, up 80 percent from the previous week, and net **soybean export sales** were 1.7 mmt for the same period, up 20 percent from the previous week.

Rail

U.S. Class 1 railroads originated 23,571 **grain carloads** for the week ending December 16, down 1 percent from the previous week, down 3 percent from last year, and down 1 percent from the 3-year average.

Average January shuttle **secondary railcar** bids/offers per car were \$27 below tariff for the week ending December 21, up \$60 from last week, and \$452 lower than last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending December 23, **barge grain movements** totaled 630,186 tons, 22 percent lower than the previous week, and down 2 percent from the same period last year.

For the week ending December 23, 396 grain barges **moved down river**, down 23 percent from last week. 728 grain barges were **unloaded in New Orleans**, 21 percent lower than the previous week.

Ocean

For the week ending December 21, 31 **ocean-going grain vessels** were loaded in the Gulf, 34 percent less than the same period last year. Forty-nine vessels are expected to be loaded within the next 10 days, 23 percent less than the same period last year.

For the week ending December 21, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$44.25 per metric ton, down 3 percent from the previous week. The cost of shipping from the PNW to Japan was \$24.75 per metric ton, down 2 percent from the previous week.

Fuel

During the week ending December 25, average **diesel fuel prices** increased 0.2 cents from the previous week at \$2.90 per gallon, 36 cents above the same week last year.

Feature Article/Calendar

To Our Readers:

We sincerely appreciate our readers and their continued support this past year. USDA's *Grain Transportation Report* (GTR) team recognizes the U.S. grain business is highly competitive, fast paced, and ever evolving. We know the industry's need for timely and high quality information is essential for making good transportation and marketing decisions and that an efficient and well informed grain industry is critical to U.S. agriculture and our Nation's economy. Thus, our team aspires to provide the U.S. grain industry with up-to-date, timely, and insightful information throughout the year in the [GTR](#) to assist the industry in making sound decisions. In addition to the GTR, we also provide other timely information and analysis relevant to the transportation of agricultural products. For example, our staff gave several [presentations](#) at conferences and stakeholder groups to emphasize the importance of transportation to agriculture. In addition, several cooperating universities also wrapped-up research funded by AMS, such as a study [modeling the transportation costs](#) of international containerized soybean exports and a study of [grain basis behavior during transportation disruptions](#).

Overall Recap

A quick high-level recap of the year shows that a majority of the Midwest experienced a relatively mild winter in 2017 with occasional periods of record warmth accompanied by brief episodes of rain or snow, with fewer than normal delays and disruptions. However, there were weather-related rail disruptions in the west and Upper Plains States during the early part of the year. This temporarily reduced carloads and increased the number of outstanding car orders. In the spring, barge traffic saw disruptions with high water conditions and delays caused by lock and dam repairs. The impact of Hurricane Harvey later in the year slowed traffic in the Texas Gulf.

Despite the logistics issues grain transportation overcame many obstacles in 2017, but nevertheless fell short of reaching the levels achieved in 2016. For example, year-to-date (through December 16, 2017) grain carloads originated by U.S. Class I railroads are 2.5 percent lower than a year ago. As of week 51, total grain barge tonnages in 2017 reached 42.4 million tons, 5 percent lower than last year's total annual tonnage.

Despite an uptick in the ocean freight rates during the year, grain exports and grain loading activities in the U.S. Gulf and the Pacific Northwest (PNW) were strong throughout the year. Year-to-date ocean-going grain vessels, loaded or waiting to load in the U.S. Gulf and PNW, were 2,338 and 959—4 and 30 percent more than the previous year, respectively.

2017 Agricultural Transportation Overview

Even with a record soybean crop and near-record corn crop, late 2017 did not have major transportation problems sometimes associated with large crops. Key developments and observations in 2017 are highlighted below.

Grain Inspections: U.S. inspections of grain for export were strong during the first half of 2017, but began to slow down after that period, despite the fall harvest of corn and soybeans. Year-to-date inspections of corn and soybeans are down 7 and 5 percent, respectively, from last year due in part to increased export competition, but wheat inspections are up 13 percent.

Rail: With high grain stocks in December 2016 (see [January 26, 2017 GTR](#)), U.S. Class I rail grain shipments set monthly volume records in March and May of 2017 at 117,988 and 116,679 carloads, respectively. However, the high premiums in the secondary railcar market that began with the 2016 record corn and soybean harvest (and continued through March of 2017) did not reemerge with the 2017 harvest. Compared to the previous year, weekly average October shuttle rates per car were almost \$1,000 less on BNSF Railway (BNSF) and \$700 less on Union Pacific Railway (UP) between August and October. Weekly average November shuttle rates per car were almost \$600 less on BNSF and \$200 less on UP between August and November. By the end of November, average secondary shuttle rates were trading at a \$100 to \$300 discount to the tariff rate, indicating surplus capacity for grain railcars. Contributing factors to railcar availability during this year's harvest included reduced soybean exports and the slower pace and smaller harvest of this year's corn crop. As a result, weekly grain carloadings averaged only 89 percent of the comparable amount recorded for last year between October and the first half of December. In addition, railroads did not experience any major transportation disruptions during the 2017 harvest, which helped keep the supply of grain cars balanced with shipper demand.

Railroads also dealt with various weather-related disruptions in 2017. Beginning in late 2016 and continuing through the first quarter of 2017, the western railroads—BNSF, UP, and Canadian Pacific Railway—faced severe winter conditions, with heavy snow, track washouts, and landslides (see [February 23, 2017 GTR](#)). Much of this was concentrated in the Upper Great Plains and Pacific Northwest region. In late August and early September, Hurricanes Harvey and Irma temporarily affected rail operations in the Texas Gulf and Florida, but despite these challenges, rail service for the 2017 grain harvest was relatively smooth

Barge: The Midwest experienced a relatively mild winter with occasional periods of record warmth accompanied by brief episodes of rain or snow. This resulted in generally normal navigation conditions throughout early 2017. However, by spring, persistent rainfall caused high water conditions that slowed and sometimes halted navigation on portions of the Nation's inland waterways. Continued rain produced constant high water throughout much of June. As July began, falling river levels throughout the Midwest caused navigation delays as river operations adjusted to the lower water levels. At Ohio River Locks and Dam (L&D) 52, structural problems began that would impact navigation for the rest of the year. In addition, on-going repairs at La Grange L&D on the Illinois River would also slow traffic. During December, dredging activities to remove underwater rock formations delayed barge traffic on the Mississippi River between St. Louis and the mouth of the Ohio River. As of week 51 (December 23), calendar-year-to-date grain barge tonnages on the locking portions of the Mississippi, Ohio, and Arkansas Rivers reached 40.3 million tons, 5 percent lower than last year's 51-week total. However, from September through November (first quarter of 2017-18 crop year), marketing year-to-date tonnages amounted to 5.9 million tons, 15 percent lower than the same period a year ago. The recent decline is due in part to stronger than expected competition from South America in the soybean market.

Ocean: Ocean freight rates for shipping bulk commodities, including grain, increased during the year due to strong iron ore and grain trade demand, but as of mid-December, rates still remained significantly below the historical highs of 2008 because the bulk shipping market is flooded with excess vessel supply. Despite the increase in ocean freight rates, ocean-going grain vessel loading activity out of the U.S. Gulf and Pacific Northwest continued to be strong. As of December 14, the Gulf-to-Japan Panamax rate was \$45.50 per metric ton (mt)—24 percent more than the same period a year earlier, and 13 percent above the 4-year average. The Pacific Northwest-to-Japan rate was \$25.25 per mt—up 31 percent from the beginning of the year, and 2 percent above the 4-year average.

Happy New Year

We are thankful for another great year and look forward to continuing to serve our readers in the years ahead. We sincerely hope the insight and analysis we provide have helped you to make informed transportation and marketing decisions. We thank all industry and government representatives who regularly and voluntarily provide us with the necessary information and data to produce this report. We wish you a healthy and prosperous New Year!

Sincerely,

[*The Grain Transportation Report Team*](#)

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
12/27/17	195	272	212	163	198	176
12/20/17	195	264	218	154	203	179

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)

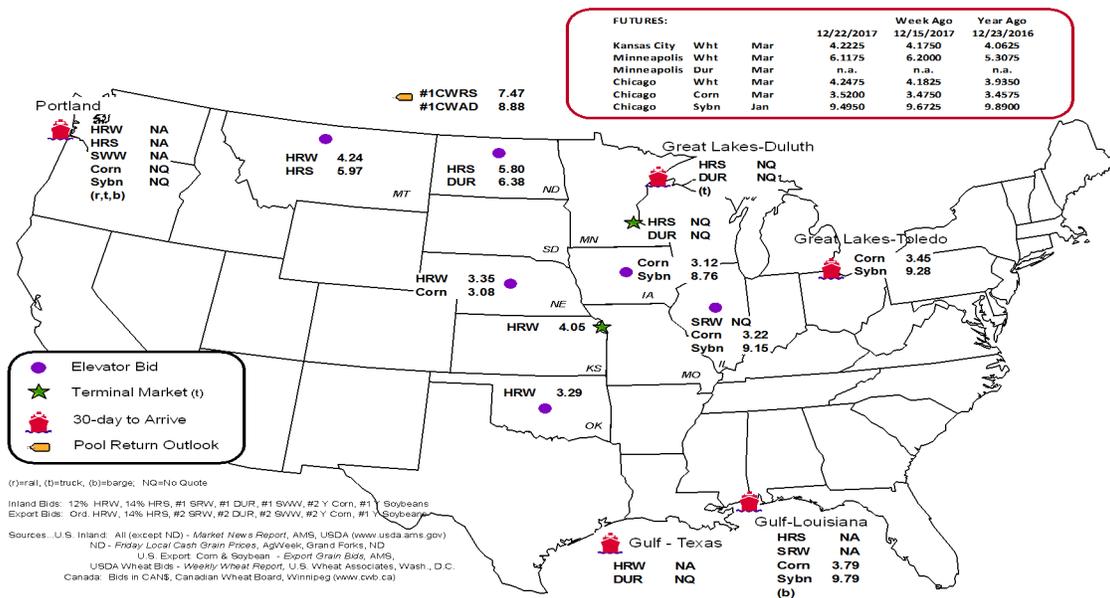
Commodity	Origin--Destination	12/22/2017	12/15/2017
Corn	IL--Gulf	-0.57	-0.54
Corn	NE--Gulf	-0.71	-0.69
Soybean	IA--Gulf	-1.03	-1.01
HRW	KS--Gulf	n/a	-2.57
HRS	ND--Portland	n/a	-1.69

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
12/20/2017 ^p	518	1,447	6,794	413	9,172	12/16/2017	2,264
12/13/2017 ^r	360	1,021	7,120	399	8,900	12/9/2017	1,705
2017 YTD ^r	28,572	75,429	283,759	21,723	409,483	2017 YTD	117,488
2016 YTD ^r	36,167	85,728	294,447	27,825	444,167	2016 YTD	105,264
2017 YTD as % of 2016 YTD	79	88	96	78	92	% change YTD	112
Last 4 weeks as % of 2016 ²	45	44	96	32	75	Last 4wks % 2016	117
Last 4 weeks as % of 4-year avg ²	34	59	109	33	85	Last 4wks % 4 yr	131
Total 2016	36,925	86,992	299,932	28,728	452,577	Total 2016	92,982
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2016 and prior 4-year average.

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

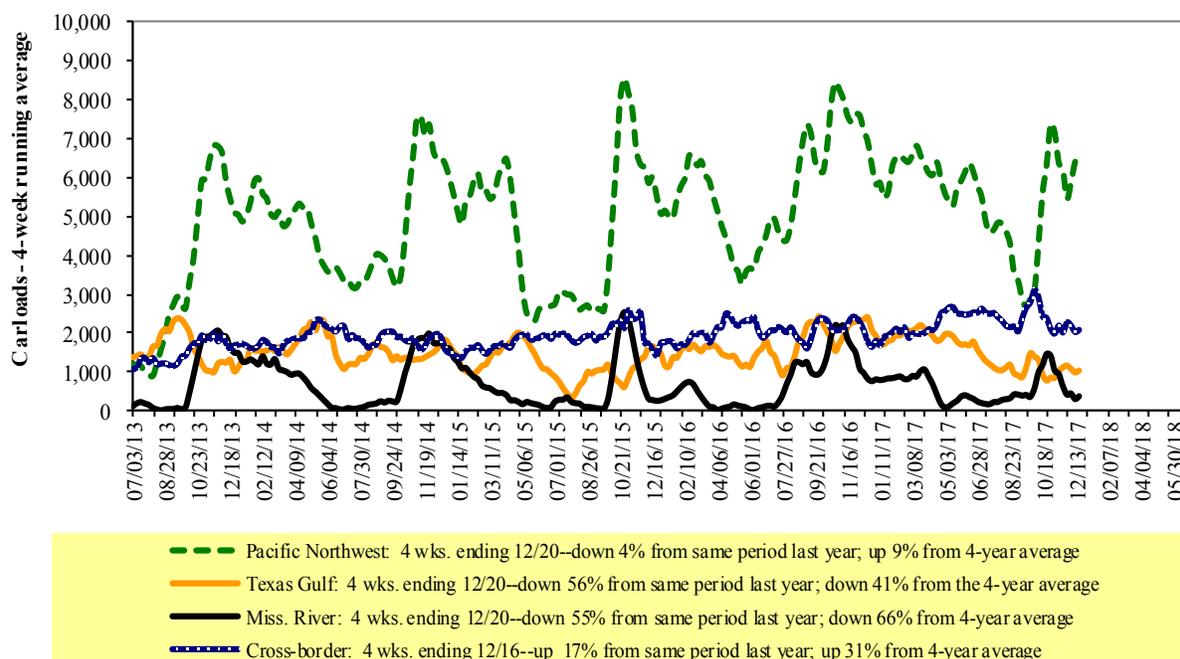
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

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

For the week ending: 12/16/2017	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,039	2,467	12,338	1,262	5,465	23,571	3,705	4,922
This week last year	2,357	2,722	12,408	698	6,181	24,366	3,945	5,361
2017 YTD	86,327	138,276	558,701	49,100	280,404	1,112,808	192,021	236,722
2016 YTD	91,493	145,758	569,766	43,771	290,045	1,140,833	186,690	226,374
2017 YTD as % of 2016 YTD	94	95	98	112	97	98	103	105
Last 4 weeks as % of 2016*	104	90	99	116	84	95	83	104
Last 4 weeks as % of 3-yr avg**	92	91	107	119	89	99	77	102
Total 2016	95,179	151,021	590,779	45,246	300,836	1,183,061	193,658	234,738

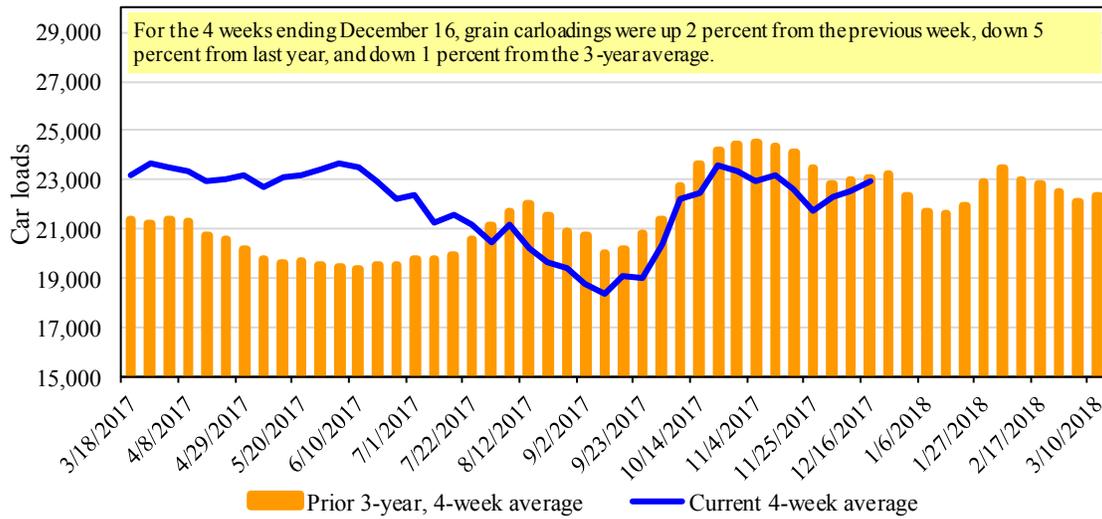
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 12/21/2017		Delivery period							
		Jan-18	Jan-17	Feb-18	Feb-17	Mar-18	Mar-17	Apr-18	Apr-17
BNSF ³	COT grain units	no bids	34	no bids	6	no bids	3	no bids	no bids
	COT grain single-car ⁵	0	105	0	67	0	24	0	6
UP ⁴	GCAS/Region 1	no bids	no bids	no bids	no bids	no offer	no offer	n/a	n/a
	GCAS/Region 2	no bids	no bids	no bids	no bids	no offer	no offer	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - GCAS = Grain Car Allocation System

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

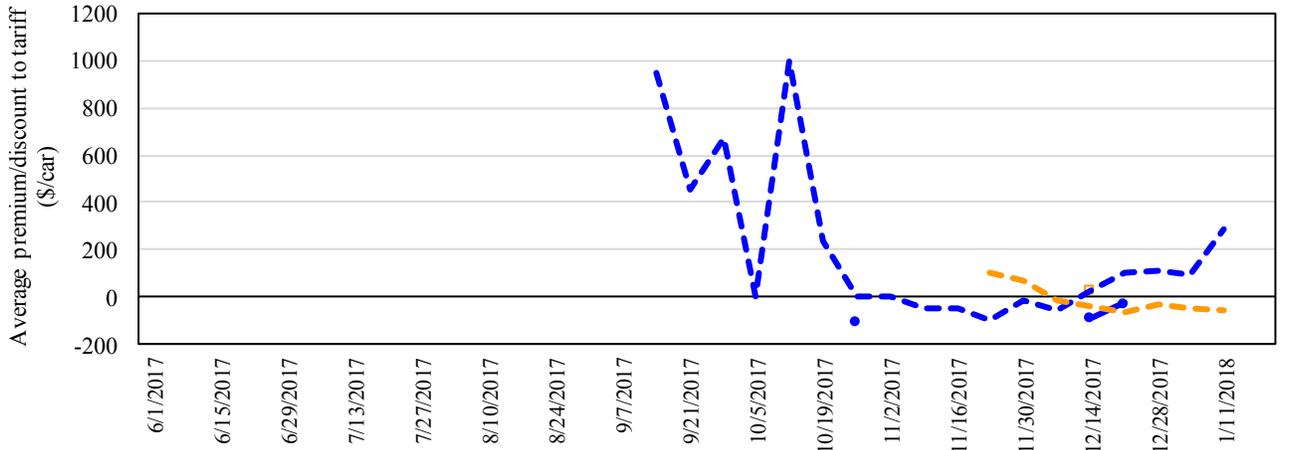
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

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

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



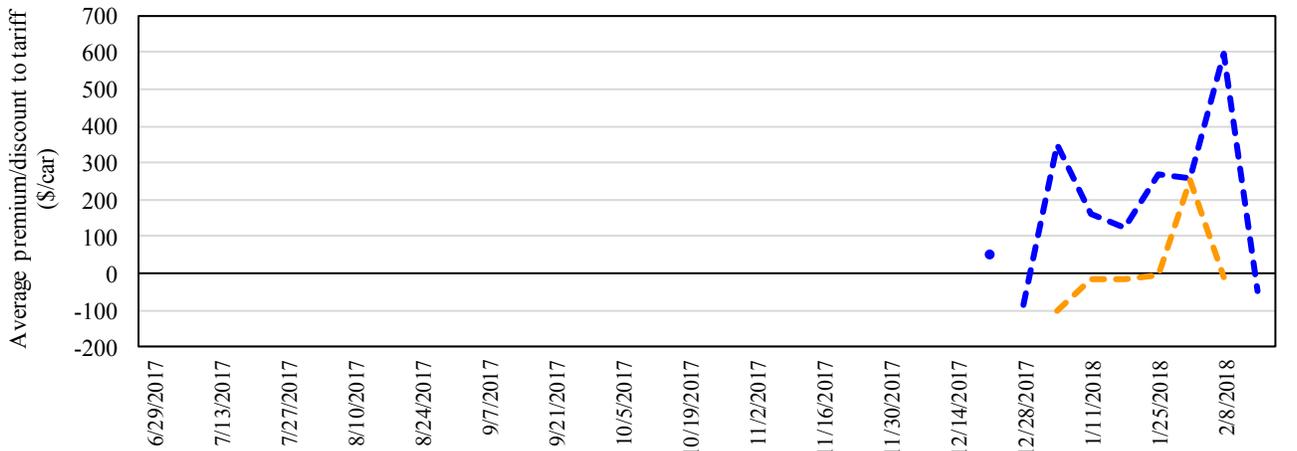
	12/21/2017	BNSF	UP
Non-Shuttle	n/a	n/a	n/a
Shuttle	\$83		-\$138

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

There were no Non-Shuttle bids/offers this week.
 Average Shuttle bids/offers rose \$60 this week and are at 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 February 2018, Secondary Market



	12/21/2017	BNSF	UP
Non-Shuttle	n/a	n/a	n/a
Shuttle	\$50		n/a

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

There were no Non-Shuttle bids/offers this week.
 There were no Shuttle bids/offers last week. Average Non-Shuttle bids/offers this week are at 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 March 2018, Secondary Market

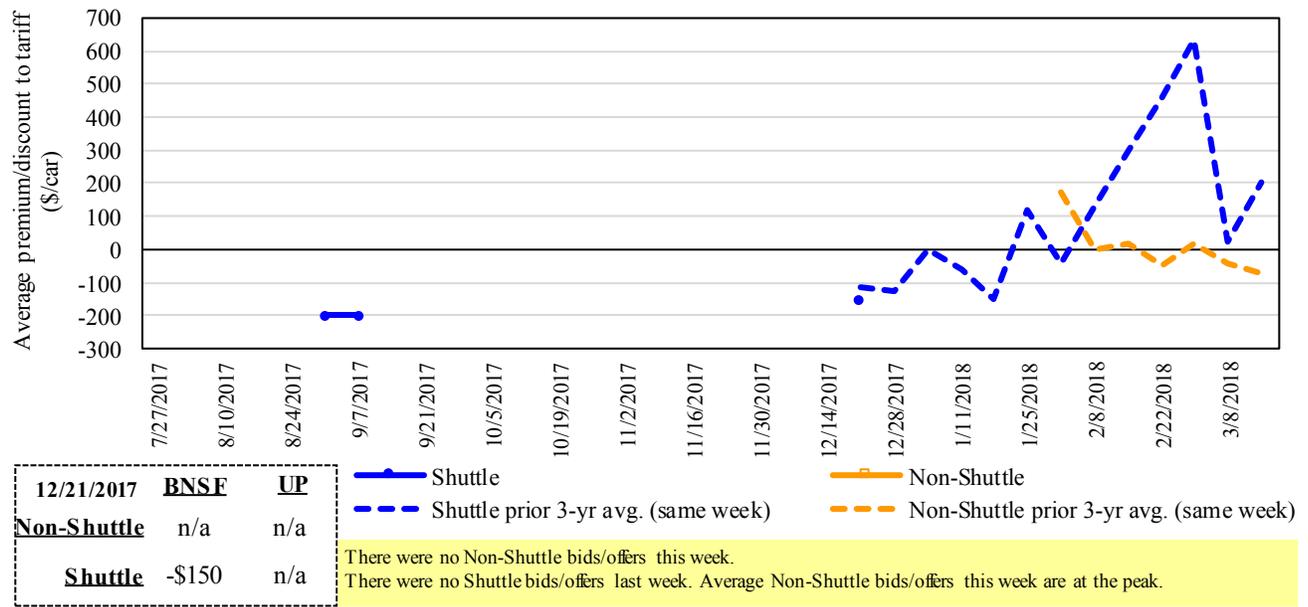


Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending: 12/21/2017		Delivery period					
		Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18
Non-shuttle	BNSF-GF	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	83	50	(150)	n/a	n/a	n/a
	Change from last week	58	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	(817)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(138)	n/a	n/a	n/a	n/a	n/a
	Change from last week	62	n/a	n/a	n/a	n/a	n/a
	Change from same week 2016	(88)	n/a	n/a	n/a	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

December, 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	\$71	\$39.26	\$1.07	4
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$0	\$41.14	\$1.12	0
	Wichita, KS	Los Angeles, CA	\$7,050	\$0	\$70.01	\$1.91	1
	Wichita, KS	New Orleans, LA	\$4,540	\$125	\$46.32	\$1.26	4
	Sioux Falls, SD	Galveston-Houston, TX	\$6,786	\$0	\$67.39	\$1.83	5
	Northwest KS	Galveston-Houston, TX	\$4,816	\$137	\$49.18	\$1.34	4
	Amarillo, TX	Los Angeles, CA	\$5,021	\$190	\$51.75	\$1.41	5
	Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,931	\$141	\$40.44	\$1.03
Toledo, OH		Raleigh, NC	\$6,344	\$0	\$63.00	\$1.60	5
Des Moines, IA		Davenport, IA	\$2,258	\$30	\$22.72	\$0.58	1
Indianapolis, IN		Atlanta, GA	\$5,446	\$0	\$54.08	\$1.37	5
Indianapolis, IN		Knoxville, TN	\$4,540	\$0	\$45.08	\$1.15	5
Des Moines, IA		Little Rock, AR	\$3,609	\$88	\$36.71	\$0.93	3
Des Moines, IA		Los Angeles, CA	\$5,327	\$255	\$55.43	\$1.41	4
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$127	\$37.32	\$1.02	2
	Toledo, OH	Huntsville, AL	\$5,287	\$0	\$52.50	\$1.43	5
	Indianapolis, IN	Raleigh, NC	\$6,460	\$0	\$64.15	\$1.75	5
	Indianapolis, IN	Huntsville, AL	\$4,764	\$0	\$47.31	\$1.29	5
	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$141	\$48.52	\$1.32	7
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$0	\$39.26	\$1.07	0
	Wichita, KS	Galveston-Houston, TX	\$4,171	\$0	\$41.42	\$1.13	8
	Chicago, IL	Albany, NY	\$5,663	\$0	\$56.24	\$1.53	3
	Grand Forks, ND	Portland, OR	\$5,611	\$0	\$55.72	\$1.52	0
	Grand Forks, ND	Galveston-Houston, TX	\$5,931	\$0	\$58.90	\$1.60	0
	Northwest KS	Portland, OR	\$5,812	\$224	\$59.94	\$1.63	5
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	\$3,731	\$141	\$38.45	\$0.98	9
	Lincoln, NE	Galveston-Houston, TX	\$3,700	\$0	\$36.74	\$0.93	0
	Des Moines, IA	Amarillo, TX	\$3,970	\$110	\$40.52	\$1.03	3
	Minneapolis, MN	Tacoma, WA	\$5,000	\$0	\$49.65	\$1.26	0
	Council Bluffs, IA	Stockton, CA	\$4,820	\$0	\$47.86	\$1.22	2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,600	\$0	\$55.61	\$1.51	0
	Minneapolis, MN	Portland, OR	\$5,650	\$0	\$56.11	\$1.53	0
	Fargo, ND	Tacoma, WA	\$5,500	\$0	\$54.62	\$1.49	0
	Council Bluffs, IA	New Orleans, LA	\$4,775	\$162	\$49.03	\$1.33	7
	Toledo, OH	Huntsville, AL	\$4,352	\$0	\$43.22	\$1.18	3
Grand Island, NE	Portland, OR	\$5,710	\$229	\$58.98	\$1.61	6	

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements.

²Approximate load per car = 111 short tons (100.7 metric tons): corn 56 lbs./bu., wheat and soybeans 60 lbs./bu.

³Regional economic areas are defined by the Bureau of Economic Analysis (BEA)

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

Table 8

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

Date: December, 2017			Fuel				Percent
Commodity	Origin state	Destination region	Tariff rate/car ¹	surcharge per car ²	Tariff plus surcharge per:		change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	0
	OK	Cuautitlan, EM	\$6,631	\$98	\$68.75	\$1.87	1
	KS	Guadalajara, JA	\$7,309	\$285	\$77.59	\$2.11	5
	TX	Salinas Victoria, NL	\$4,292	\$60	\$44.46	\$1.21	3
Corn	IA	Guadalajara, JA	\$8,313	\$248	\$87.47	\$2.22	3
	SD	Celaya, GJ	\$7,700	\$0	\$78.68	\$2.00	2
	NE	Queretaro, QA	\$8,013	\$205	\$83.97	\$2.13	3
	SD	Salinas Victoria, NL	\$6,743	\$0	\$68.90	\$1.75	2
	MO	Tlalnepantla, EM	\$7,379	\$200	\$77.44	\$1.97	3
	SD	Torreon, CU	\$7,300	\$0	\$74.59	\$1.89	2
Soybeans	MO	Bojay (Tula), HG	\$8,134	\$231	\$85.47	\$2.32	-5
	NE	Guadalajara, JA	\$8,692	\$250	\$91.37	\$2.48	-1
	IA	El Castillo, JA	\$8,960	\$0	\$91.55	\$2.49	0
	KS	Torreon, CU	\$7,489	\$180	\$78.36	\$2.13	1
Sorghum	NE	Celaya, GJ	\$7,345	\$226	\$77.36	\$1.96	4
	KS	Queretaro, QA	\$7,819	\$122	\$81.14	\$2.06	3
	NE	Salinas Victoria, NL	\$6,452	\$98	\$66.92	\$1.70	4
	NE	Torreon, CU	\$6,790	\$172	\$71.13	\$1.80	4

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

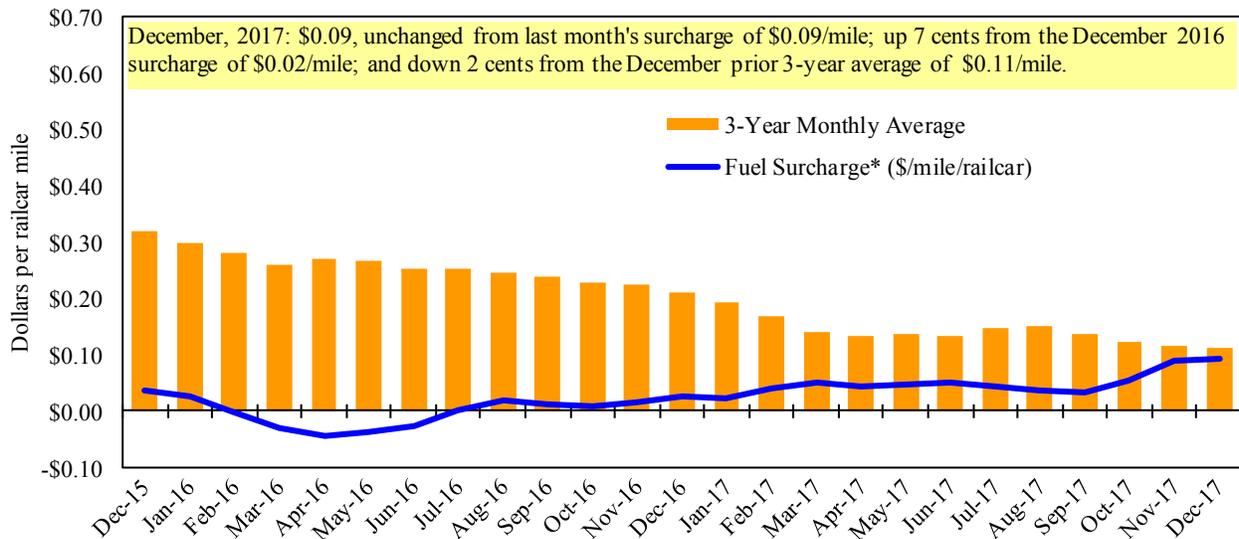
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

⁴Percentage change calculated using tariff rate plus fuel surcharge

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average¹

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

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

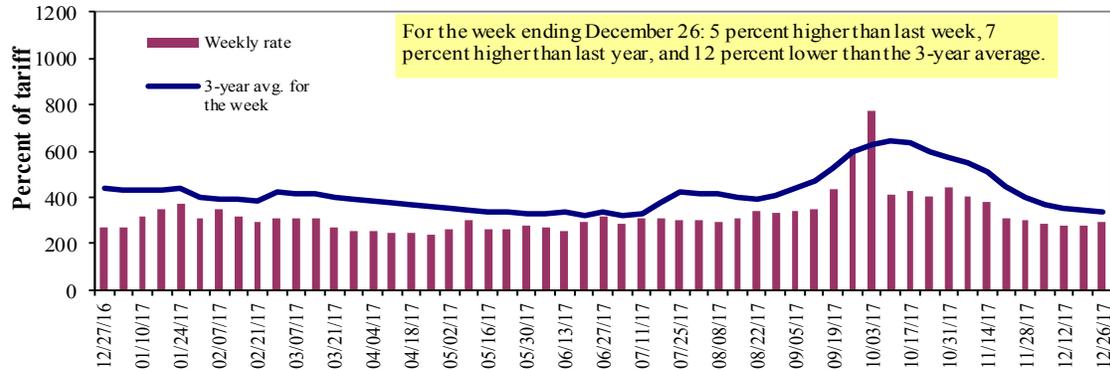
** CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate ¹	12/26/2017	-	-	293	223	266	266	193
	12/19/2017	-	-	278	222	269	269	183
\$/ton	12/26/2017	-	-	13.60	8.90	12.48	10.75	6.06
	12/19/2017	-	-	12.90	8.86	12.62	10.87	5.75
Current week % change from the same week:								
	Last year	-	-	7	20	25	25	17
	3-year avg. ²	-	-	-12	4	-5	-5	-7
Rate ¹	January	-	-	316	228	250	250	190
	March	-	320	295	220	228	228	188

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" = closed

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

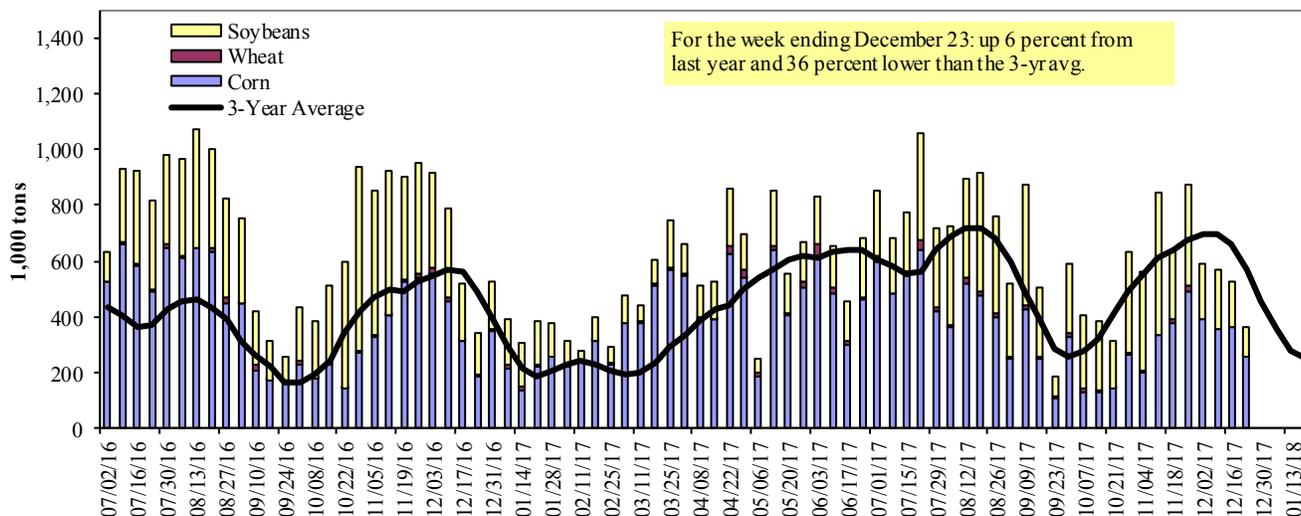
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$$

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 12/23/2017	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	66	5	18	0	89
Alton, IL (L26)	269	6	97	0	372
Granite City, IL (L27)	254	6	102	0	362
Illinois River (L8)	207	3	63	0	274
Ohio River (L52)	49	22	156	5	232
Arkansas River (L1)	0	15	21	0	36
Weekly total - 2017	302	44	279	5	630
Weekly total - 2016	226	35	371	9	640
2017 YTD ¹	21,920	2,182	15,859	359	40,320
2016 YTD	23,721	1,998	16,341	344	42,405
2017 as % of 2016 YTD	92	109	97	104	95
Last 4 weeks as % of 2016 ²	89	71	78	199	84
Total 2016	24,136	2,030	16,668	344	43,178

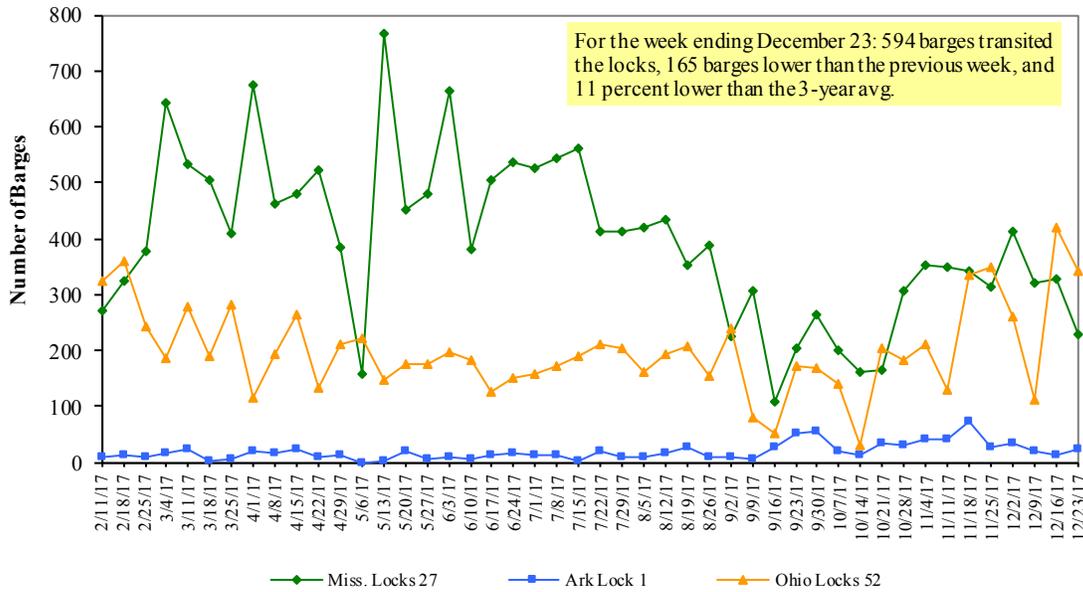
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2016.

Note: Total may not add exactly, due to rounding

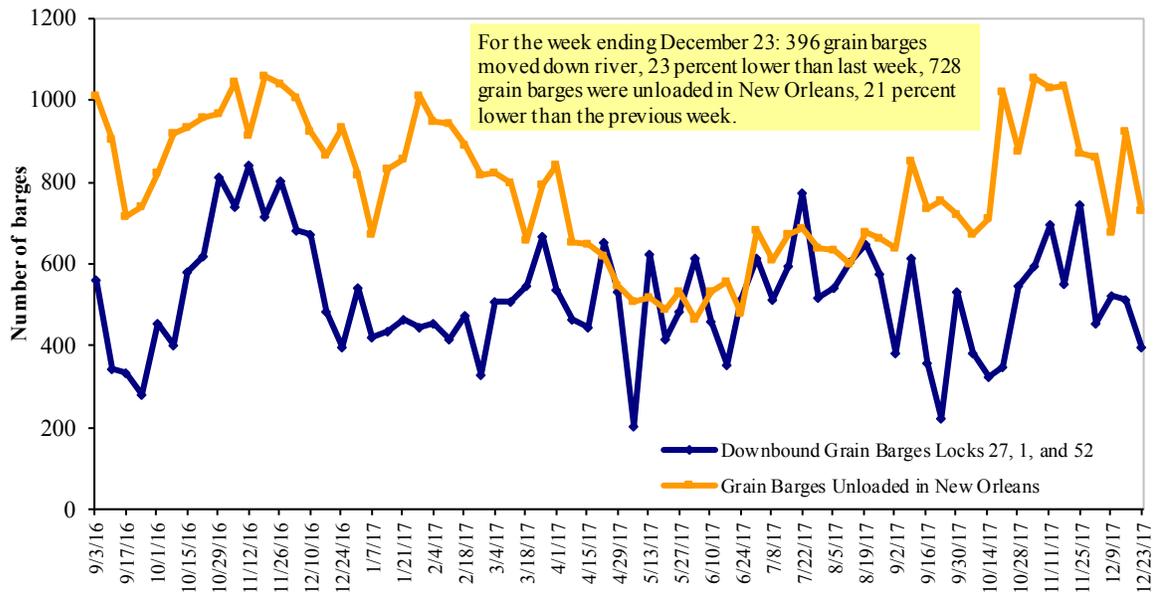
Source: U.S. Army Corps of Engineers

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 Prices, Week Ending 12/25/2017 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.904	0.007	0.331
	New England	2.943	0.019	0.332
	Central Atlantic	3.068	0.008	0.381
	Lower Atlantic	2.782	0.004	0.304
II	Midwest ²	2.854	0.001	0.365
III	Gulf Coast ³	2.708	0.011	0.287
IV	Rocky Mountain	2.948	-0.010	0.432
V	West Coast	3.312	-0.015	0.505
	West Coast less California	3.026	-0.018	0.299
	California	3.539	-0.013	0.668
Total	U.S.	2.903	0.002	0.363

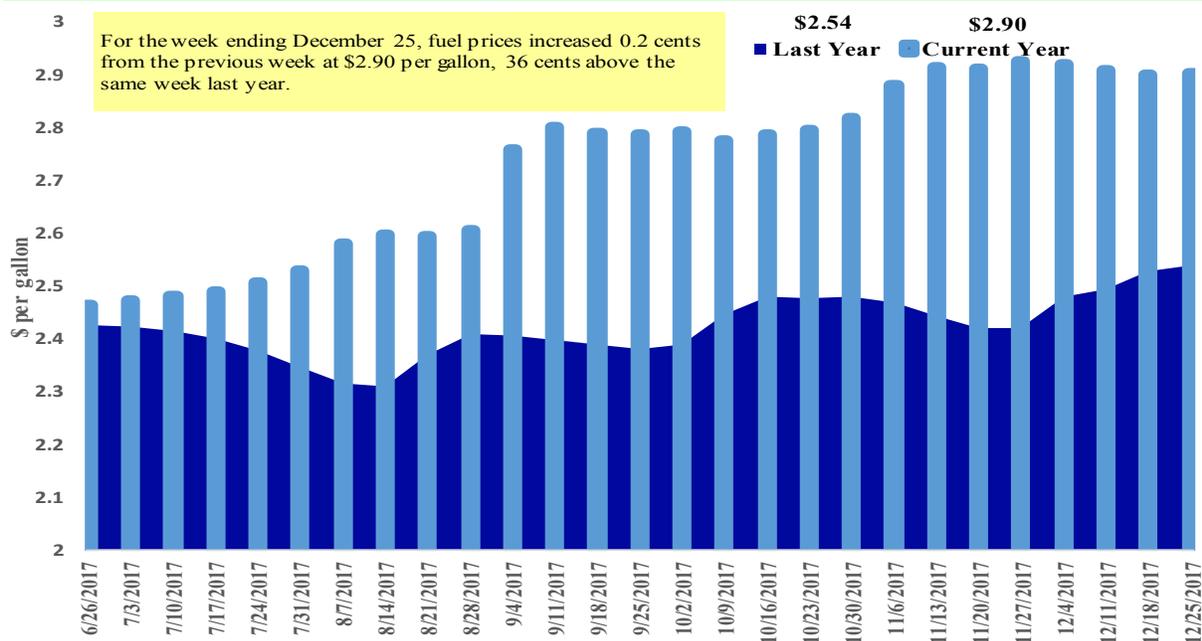
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
12/14/2017	2,252	727	1,636	1,287	58	5,959	15,845	13,696	35,499
This week year ago	1,994	644	2,435	1,094	149	6,316	19,634	17,289	43,239
Cumulative exports-marketing year²									
2017/18 YTD	5,249	1,136	3,372	2,942	214	12,913	9,479	25,841	48,233
2016/17 YTD	6,153	1,132	4,084	2,284	230	13,882	14,711	29,622	58,215
YTD 2017/18 as % of 2016/17	85	100	83	129	93	93	64	87	83
Last 4 wks as % of same period 2016/17	104	91	68	118	39	90	77	78	79
2016/17 Total	11,096	2,285	7,923	4,254	484	26,042	41,864	51,156	119,062
2015/16 Total	5,538	3,057	6,285	3,551	670	19,101	45,564	49,821	114,486

¹ Current unshipped (outstanding) export sales to date

² Shipped export sales to date; new marketing year now in effect for wheat, corn, and soybeans

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

Top 5 Importers¹ of U.S. Corn

For the week ending 12/14/2017			% change current MY from last MY	Exports ³ 3-year avg 2014-2016 - 1,000 mt -
	2017/18 Current MY	2016/17 Last MY		
Mexico	9,329	9,465	(1)	12,297
Japan	4,103	4,883	(16)	11,450
Korea	1,091	3,029	(64)	4,494
Colombia	1,842	2,132	(14)	4,179
Peru	1,485	1,467	1	2,693
Top 5 Importers	17,849	20,975	(15)	35,113
Total US corn export sales	25,324	34,345	(26)	49,308
% of Projected	52%	59%		
Change from prior week²	1,558	1,251		
Top 5 importers' share of U.S. corn export sales	70%	61%		71%
USDA forecast, December 2017	48,982	58,346	(16)	
Corn Use for Ethanol USDA forecast, December 2017	140,335	138,151	2	

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/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 12/14/2017	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 -
China	23,107	29,821	(23)	31,881
Mexico	2,035	1,914	6	3,452
Indonesia	890	929	(4)	1,987
Japan	1,073	1,215	(12)	2,067
Netherlands	726	525	0	2,098
Top 5 importers	27,831	34,403	(19)	41,486
Total US soybean export sales	39,537	46,911	(16)	52,919
% of Projected	64%	79%		
Change from prior week ²	1,743	1,813		
Top 5 importers' share of U.S. soybean export sales	70%	73%		78%
USDA forecast, December 2017	61,308	59,237	103	

(n) indicates negative number.

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/esrquery/. Total commitments change (net sales) from prior week could include revisions from previous week's
outstanding sales and/or accumulated sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 12/14/2017	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	2,138	1,889	13	2,620
Mexico	2,190	1,942	13	2,743
Philippines	2,100	1,946	8	2,395
Brazil	111	1,107	(90)	862
Nigeria	857	1,053	(19)	1,254
Korea	1,226	1,016	21	1,104
China	817	793	3	1,623
Taiwan	852	734	16	768
Indonesia	972	699	39	726
Colombia	490	610	(20)	635
Top 10 importers	11,754	11,788	(0)	14,729
Total US wheat export sales	18,871	20,198	(7)	22,804
% of Projected	71%	70%		
Change from prior week ²	796	298		
Top 10 importers' share of U.S. wheat export sales	62%	58%		65%
USDA forecast, December 2017	26,567	28,747	(8)	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports for 2015/16 - www.fas.usda.gov; Marketing year = Jun 1 - May 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/. Total commitments change (net sales) from prior week could include revisions from the previous
outstanding and/or accumulated sales³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

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

Port Regions	For the Week Ending 12/21/17	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	283	448	63	14,615	12,101	121	127	152	12,325
Corn	200	105	191	10,680	11,819	90	51	110	12,009
Soybeans	341	419	82	13,046	14,078	93	87	93	14,447
Total	824	972	85	38,340	37,998	101	89	110	38,782
Mississippi Gulf									
Wheat	49	45	110	4,171	3,467	120	64	80	3,480
Corn	268	327	82	28,351	31,078	91	64	74	31,420
Soybeans	763	1,173	65	32,043	34,176	94	85	82	35,278
Total	1,080	1,545	70	64,566	68,722	94	77	80	70,178
Texas Gulf									
Wheat	142	85	168	6,285	5,878	107	56	78	6,019
Corn	0	0	n/a	733	1,669	44	31	47	1,669
Soybeans	0	73	0	292	1,105	26	51	52	1,105
Total	142	158	90	7,310	8,652	84	52	68	8,792
Interior									
Wheat	20	35	57	1,696	1,503	113	156	142	1,543
Corn	131	191	68	8,663	7,106	122	118	135	7,197
Soybeans	111	95	116	5,414	4,508	120	122	123	4,577
Total	261	322	81	15,772	13,118	120	123	131	13,317
Great Lakes									
Wheat	25	45	57	711	1,186	60	55	76	1,186
Corn	0	3	0	192	584	33	5	13	584
Soybeans	43	0	n/a	890	910	98	57	48	910
Total	68	48	143	1,793	2,681	67	49	57	2,681
Atlantic									
Wheat	0	0	n/a	46	315	15	1	2	315
Corn	0	0	n/a	32	294	11	n/a	643	294
Soybeans	92	127	73	1,959	2,201	89	85	87	2,269
Total	92	127	73	2,038	2,809	73	81	84	2,878
U.S. total from ports¹									
Wheat	520	658	79	27,524	24,451	113	93	117	24,867
Corn	599	626	96	48,651	52,551	93	67	87	53,173
Soybeans	1,350	1,887	72	53,643	56,978	94	86	86	58,587
Total	2,469	3,170	78	129,819	133,979	97	82	91	136,627

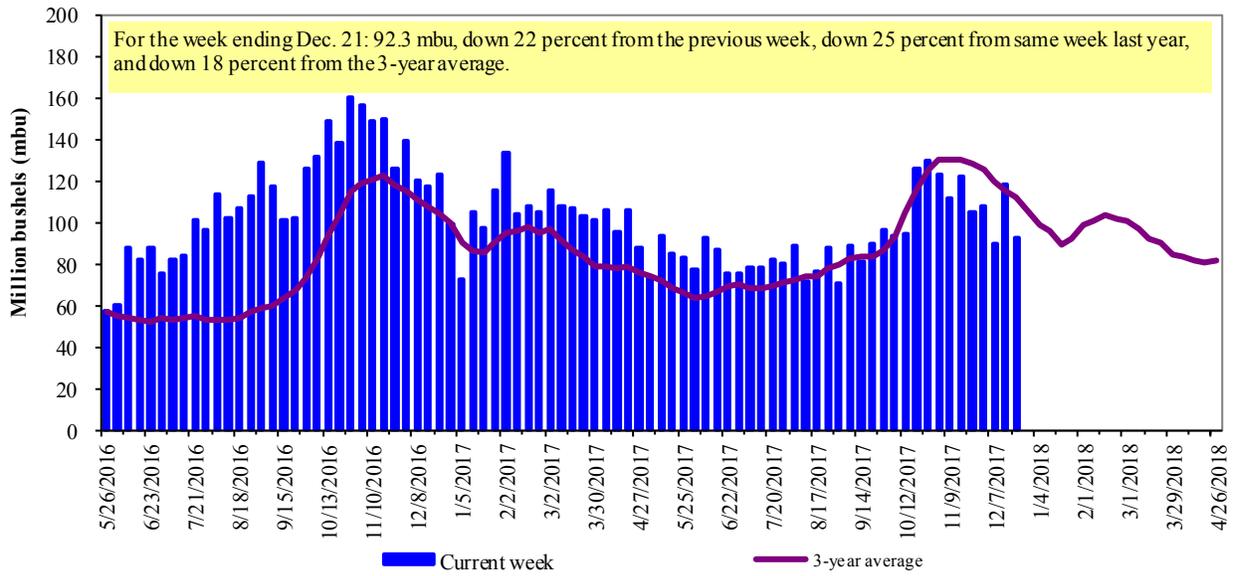
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

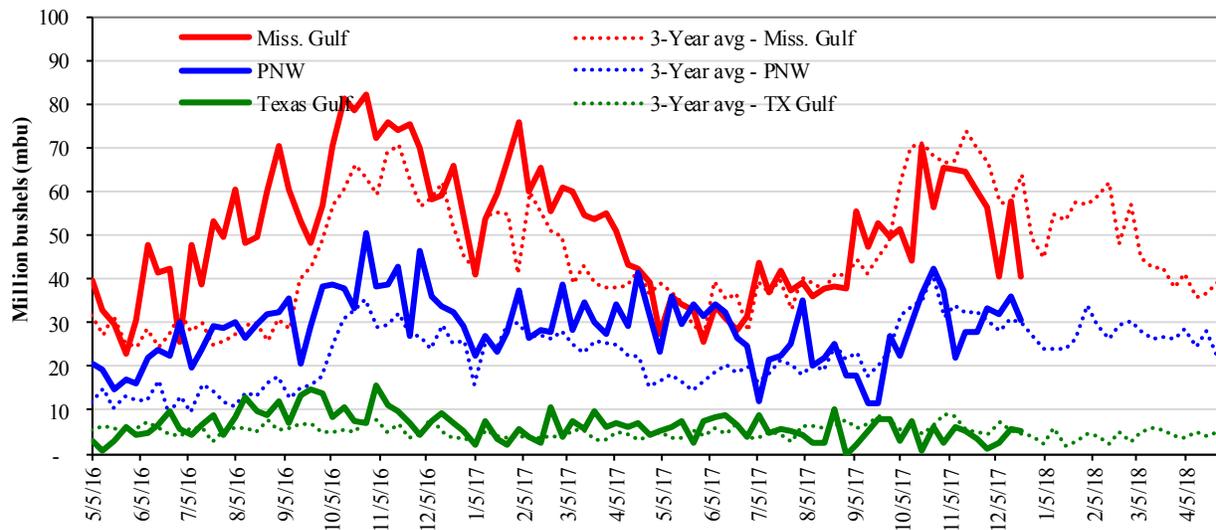
U.S. grain inspected for export (wheat, corn, and soybeans)



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 12/21/17 inspections (mbu):		Percent change from:				
Mississippi Gulf:	40.4	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	30.8	Last Year (same week):	down 30	down 10	down 28	down 14
Texas Gulf:	5.2	3-yr avg. (4-wk. mov. Avg):	down 39	down 26	down 37	down 4
			down 34	down 2	down 32	up 3

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

Ocean Transportation

Table 17

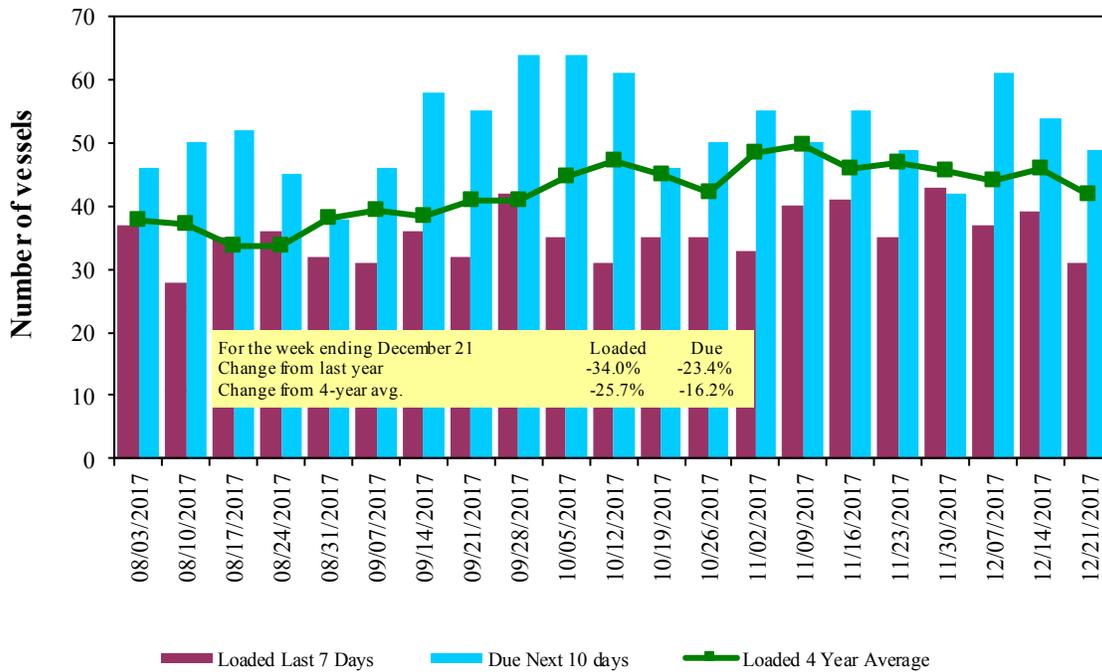
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/21/2017	52	31	49	12
12/14/2017	34	39	54	15
2016 range	(21..62)	(27..55)	(40..87)	(6..27)
2016 avg.	43	40	62	15

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

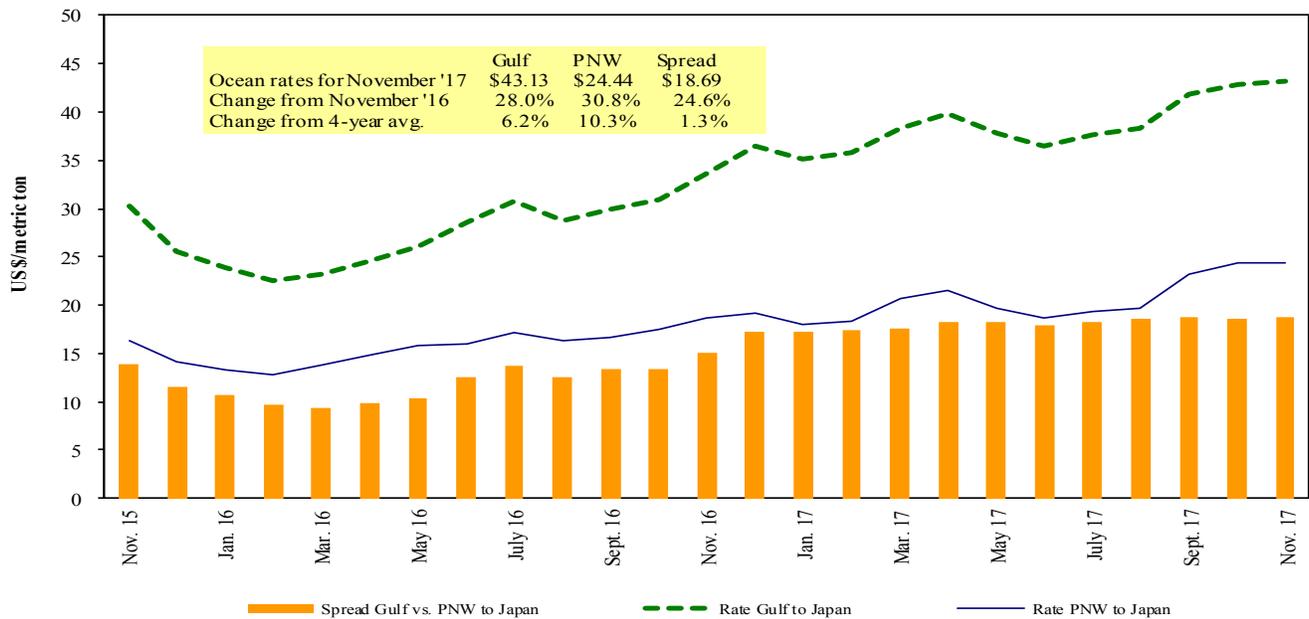
U.S. Gulf Vessel Loading Activity



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 12/23/2017

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jan 1/10	60,000	45.50
U.S. Gulf	China	Heavy Grain	Dec 15/20	60,000	44.00
U.S. Gulf	China	Heavy Grain	Dec 10/20	60,000	43.25
U.S. Gulf	China	Heavy Grain	Nov 27/Dec 5	47,700	40.50
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 20/30	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 15/25	65,000	43.85
U.S. Gulf	China	Heavy Grain	Nov 10/20	66,000	43.75
U.S. Gulf	China	Heavy Grain	Nov 10/15	66,000	40.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.75
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.25
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	42.00
U.S. Gulf	China	Heavy Grain	Nov 1/10	66,000	41.50
U.S. Gulf	Dakar	Wheat	Nov 20/30	7,500	73.89*
U.S. Gulf	Somali	Sorghum	Dec 1/10	10,640	192.10*
PNW	China	Heavy Grain	Dec 23/30	60,000	22.25
PNW	China	Heavy Grain	Dec 15/24	60,000	23.75
PNW	South Korea	Heavy Grain	Dec 14/20	60,000	24.00
Brazil	China	Heavy Grain	Dec 1/10	60,000	31.90
Brazil	China	Heavy Grain	Nov 20/30	60,000	33.75
Brazil	China	Heavy Grain	Nov 1/10	60,000	31.90
Brazil	China	Heavy Grain	Oct 25/Nov 10	60,000	32.50
Brazil	S. Korea	Heavy Grain	Nov 22/29	63,000	33.25

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

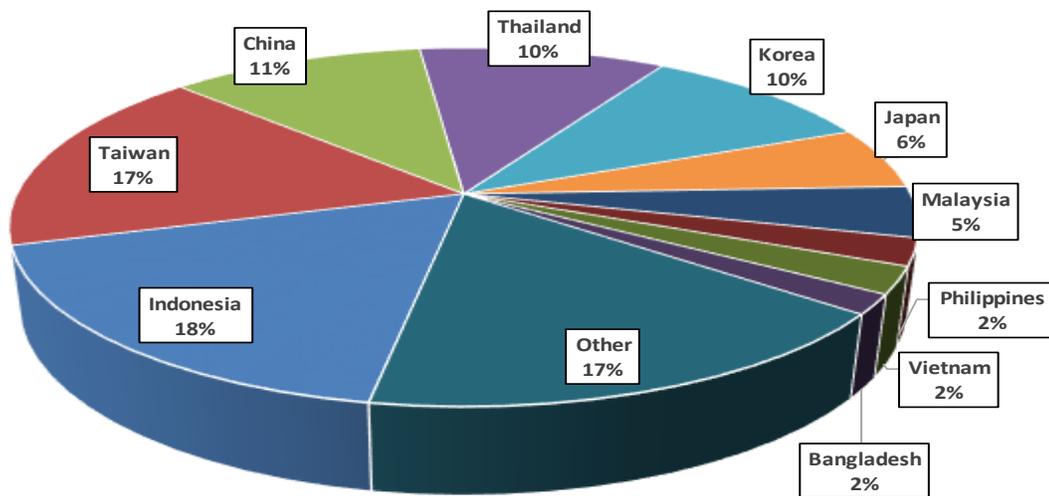
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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-September 2017

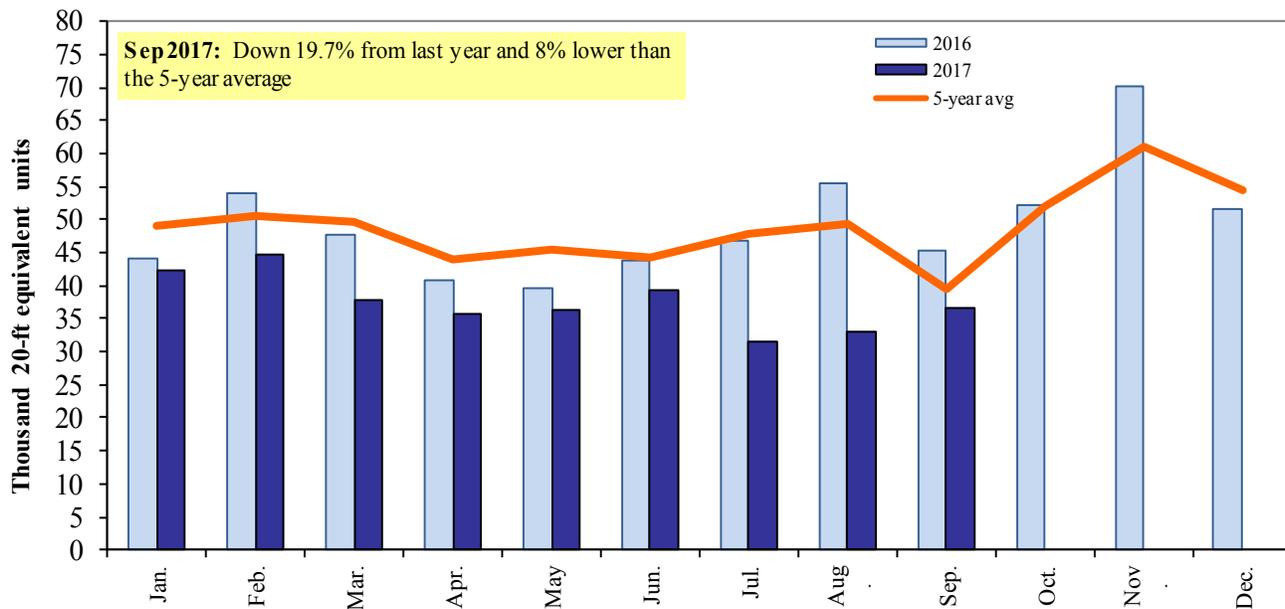


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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Ocean Transportation

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