



Grain Transportation Report

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

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July 21, 2016

WEEKLY HIGHLIGHTS

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Panama Canal and PortMiami Renew Memorandum of Understanding

On July 9, 2016, Panama Canal Administrator, Jorge L. Quijano and PortMiami Director, Juan M. Kuryla renewed a Memorandum of Understanding (MOU) to promote trade opportunities and share best customer practices. Subsequent to the initial MOU signed 13 years ago, PortMiami has made investments in numerous critical infrastructure improvements to deepen its channel to accommodate Neopanamax vessels, and improve the traffic flow and movement of cargo. The timing of the renewal of the MOU coincides with arrival of the MOL Majesty, the first Miami-bound Neopanamax vessel to transit the expanded Canal. With the opening of the Expanded Canal, Neopanamax ships have begun transiting the waterway toward U.S. Gulf and East Coast ports, such as the Port of New York and New Jersey and Houston. Many other ports which are similarly investing in infrastructure projects will be able to take advantage of the canal expansion in the future. For more details, see <https://www.pancanal.com/eng/pr/press-releases/2016/07/09/pr600.html>.

South Dakota Short Line Completes Siding Project

Earlier in July, the Rapid City, Pierre & Eastern Railroad, a regional railroad operating across South Dakota, [completed a \\$5.65 million project](#) to build 17,520 feet of main line sidings in Aurora and Huron, SD. The new sidings are expected to expand carrying capacity and increase the efficiency of interchanging with major railroads by permitting trains coming from opposite directions to pass one another. At the opening ceremony, South Dakota's Governor Dugaard said, "Dependable rail service is particularly important to our State. Because South Dakotans consume only a modest share of the grain we produce, we rely almost entirely on railroads to deliver our grain to out-of-State markets."

Pacific Northwest Grain Inspections Rebound

For the week ending July 14, total Pacific Northwest (PNW) grain inspections reached .621 million metric tons (mmt), up 20 percent from the previous week, and up 98 percent from the same time last year. Mississippi Gulf inspections reached 1 mmt, but were down 19 percent from the past week. **Total inspections of grain** (corn, wheat, soybeans) for export reached 2.15 mmt, up 1 percent from the previous week, up 9 percent from last year, and 52 percent above the 3-year average. During the last 4 weeks, total grain inspections were 28 percent above last year and 51 percent above the 3-year average. Wheat inspections increased 16 percent from the previous week as shipments to Asia and Latin America increased. Inspections of corn and soybeans were down slightly. Outstanding export sales (unshipped) of wheat and soybeans were unchanged, but corn export sales decreased.

Snapshots by Sector

Export Sales

During the week ending July 7, **unshipped balances** of wheat, corn, and soybeans totaled 24.8 mmt, up 59 percent from the same time last year. Net weekly **wheat export sales** were .318 mmt, down 62 from the previous week. Net **corn export sales** were .668 mmt, up 81 percent from the previous week, and net **soybean export sales** were .364 mmt, down 43 percent from the past week.

Rail

U.S. Class I railroads originated 20,746 **grain carloads** for the week ending July 9, down 11 percent from the previous week, up 12 percent from last year, and up 20 percent from the 3-year average.

Average July shuttle **secondary railcar bids/offers** per car were \$438 above tariff for the week ending July 14, up \$356 from last week. There were no shuttle bids/offers this week last year. Average secondary non-shuttle secondary railcar bids/offers were \$25 above tariff, unchanged from last week. There were no non-shuttle bids/offers this week last year.

Barge

For the week ending July 16, **barge grain movements** totaled 1,085,677 tons, 3 percent higher than last week, and up 49 percent from the same period last year.

For the week ending July 16, 686 grain barges **moved down river**, down 0.2 percent from last week; 664 grain barges were **unloaded in New Orleans**, down 19 percent from the previous week.

Ocean

For the week ending July 14, 41 **ocean-going grain vessels** were loaded in the Gulf, 46 percent more than the same period last year. Seventy-one vessels are expected to be loaded within the next 10 days, 42 percent more than the same period last year.

For the week ending July 14, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$31.25 per metric ton, unchanged from the previous week. The cost of shipping from the PNW to Japan was \$17.50 per metric ton, up 3 percent from the previous week.

Fuel

During the week ending July 18, U.S. average **diesel fuel prices** fell 1 cent from previous week to \$2.40 per gallon, down \$0.38 from the same week last year.

Feature Article/Calendar

Grain Transportation Update

USDA projected an increase in grain production and exports during the marketing year 2016/17, and so far the transportation system is expected to accommodate the potential increase in grain movements with little or no strain on the transportation networks. Total grain production is boosted by an expected increase in corn and wheat production. Total grain exports are forecast 10 percent higher than last year. Meanwhile, year-to-date grain rail carloads are comparable with last year's volume, despite a drop in total traffic for U.S. Class I railroads in 2016. For most of 2016, navigation conditions have been favorable and barge supply has been adequate for the current demand. Total grain barge tonnages¹ have reached 20.6 million tons, 25 percent higher than the 5-year average for the first half of the year. Although ocean freight rates for shipping bulk commodities, including grain, increased slightly during the past few weeks, the rates are still lower than last year and the 4-year average. Similarly, average diesel fuel prices have increased after the steady decline in 2015, but the prices are still lower than a year ago.

Higher Grain Production Estimates Help Export Projections

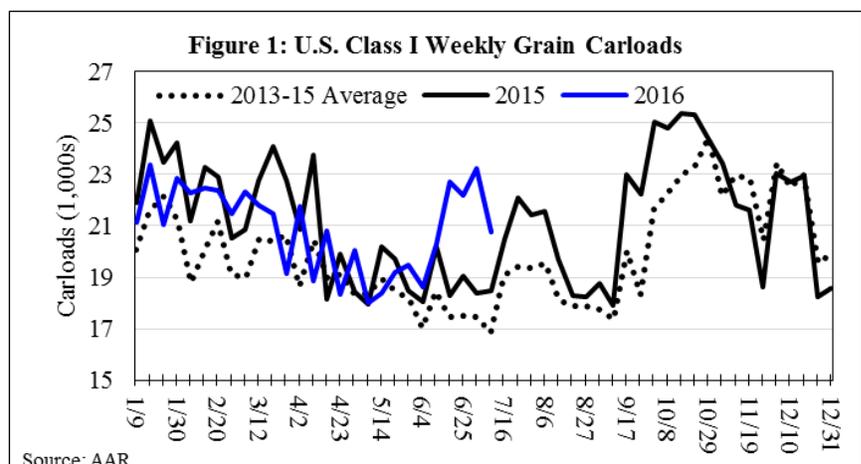
According to USDA's July [World Agricultural Supply and Demand Estimates report](#), the 2016/17 corn and wheat crops are expected to increase from the past year. Although soybean production is expected to be down slightly, total production for corn, soybeans, and wheat is forecast to reach 20.7 billion bushels (bbu) this fall, 6 percent higher than last year (Table 1). USDA also projects total grain exports to reach 4.9 billion bushels, which is 10 percent higher than the previous year. USDA's August report will have more recent production estimates, which are normally more in line with the fall harvest expectations. The increase in grain exports indicates a rise in demand for transportation services in the upcoming corn, soybean, and wheat marketing year. Currently, outstanding export sales of each of the major grains are above average. Unshipped balances of corn, wheat, and soybeans are 59 percent higher than last year at this time ([Table 12 inside the Grain Transportation Report \(GTR\)](#)), indicating demand for rail and barge grain shipments may be increasing in the near term.

Table 1. Major Grains: Production and Use, July 2016 WASDE, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2016/17 (Projected)					
Production	14,540	3,880	2,261	20,681	5.6%
Exports	2,050	1,920	925	4,895	9.5%
Domestic Use	12,150	3,970	1,332	17,452	16.7%
Ending Stocks/Use	14.7%	7.3%	49.0%		
United States 2015/16 (Estimated)					
Production	13,601	3,929	2,052	19,582	-2.9%
Exports	1,900	1,795	777	4,472	-2.0%
Domestic Use	11,792	1,999	1,161	14,952	-0.7%
Ending Stocks/Use	12.4%	9.2%	50.6%		
2014/15					
Production	14,216	3,927	2,026	20,169	
Exports	1,864	1,843	854	4,561	
Domestic Use	11,883	2,019	1,159	15,061	
Ending Stocks/Use	12.6%	4.9%	37.3%		

Grain Picks Up Some Slack for Railroads

Overall, 2016 has been a slower year in terms of total traffic for U.S. Class I railroads from a year ago. Through July 9, the Association of American Railroads (AAR) reports that year-to-date total carloads are down 13 percent compared to 2015. When intermodal units are included, total traffic for U.S. Class I railroads is 8 percent lower than last year. Coal carloads make up a significant portion of the decline, down 30 percent.

However, despite lower total traffic, year-to-date grain carloads are on pace with last year's quantity of around 564,000 cars, spurred by particularly high movements the last several weeks (Figure 1). Over the last 8 weeks, for instance, U.S. Class I railroads originated 18 percent more grain



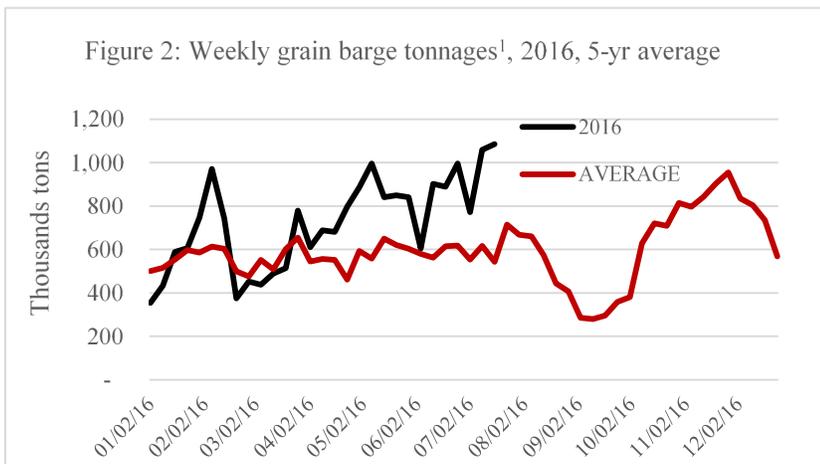
¹ As measured by down-bound tonnages at Mississippi River Locks 27, Ohio River Locks and Dam 52, and Arkansas River Lock and Dam 1. Data provided by the U.S. Army Corps of Engineers

carloads than the prior 3-year average. High grain stocks going into June and a strong winter wheat harvest may help explain the additional movements (see 7/7/16 [GTR](#)).

Considering other metrics, according to AAR, grain train speeds for U.S. Class I railroads have been considerably better this year than in 2014 and 2015.² Since January, speeds have averaged 22.7 miles per hour, 9 percent faster than the same time in both years. While speeds for grain trains slowed from mid-April (of 2016) through early June, they have increased every week since. Furthermore, rates in the secondary market for shuttle service have generally been trading close to average, indicating adequate car supply; average secondary rates for shuttle service were lower in the first quarter of 2016 than 2015, but higher in the second quarter. Currently, average bids/offers for shuttle service in October are trading at \$675 above tariff, indicating increasing demand for the upcoming harvest.

Above Average Grain Barge Tonnages in 2016

At the mid-point of calendar year 2016, total grain barge tonnages¹ have reached 20.6 million tons, 25 percent higher than the 5-year average for the first half of the year. Figure 2 shows weekly tonnages have been above average levels for most of the year. Typically, grain barge tonnages will gradually increase throughout the year until August, when shipping volumes decrease in anticipation of newly harvested corn and soybeans during late summer. During the active harvest season, tonnages will increase until late November.



For most of 2016, navigation conditions have been favorable and barge supply has been adequate for the current demand. As of July 19, St. Louis to New Orleans spot barge rates were 300 percent of tariff (\$11.97 per ton), 5 percent lower than the 5-year average. However, in recent weeks, increased barge demand and fluctuating water levels on the northern-most portions of the Upper Mississippi River has increased spot rates in the Minneapolis-St. Paul (MSP) area. As of July 19, MSP spot barge rates were 518 percent of tariff (\$32.06 per ton), 8 percent higher than the 5-year average.

Dry-Bulk Freight Market Temporarily Rallied but Rates Continued to be Moderate

Global ocean freight rates for shipping bulk commodities, including grain, have continued to rally since February 25, but are still lower than last year and the 4-year average. The basic reason for this market situation is quite simple: the world dry-bulk fleet is considerably bigger than global cargo demand. As of July 14, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$31.25 per metric ton (mt), a 13-percent decline from the same period last year, and 29 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest was \$17.50 per mt, a 10 percent decline from last year, and a 27 percent decline from the 4-year average. In the meantime, grain loading activity in the U.S. Gulf continues to be strong. During the past 4 weeks, an average of 36 ocean-going grain vessels were loaded per week, and 32 vessels were either being loaded or waiting to be loaded. An additional average of 59 vessels were expected to be loaded in the next 10 days. Ocean freight rates should continue to remain low at least in the near term until freight markets improve sufficiently to soak up the excess vessel capacity.

Diesel Fuel Prices

After the steady decline of diesel prices in 2015 flowed into 2016, diesel prices bottomed out at just under \$2.00 per gallon by the end of February. Prices then turned and rose every week, with the exception of a 1-cent decrease in April, through mid-June. From mid-June to mid-July, prices stabilized, falling less than 3 cents in 5 weeks to end at \$2.40 during the week of July 18. According to the Energy Information Administration, growing global oil supply disruptions, rising oil demand, and falling U.S. crude oil production contributed to the monthly crude oil price increases from February through May. By mid-June crude prices began to fall slightly allowing diesel prices to stabilize. Crude oil makes up 45 percent of the retail price of diesel fuel, which implies a strong corresponding relationship. GTRContactUs@ams.usda.gov

² According to AAR, "Train Speed measures the line-haul movement between terminals. The average speed is calculated by dividing train-miles by total hours operated, excluding yard and local trains, passenger trains, maintenance of way trains, and terminal time."

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
07/20/16	161	256	222	234	140	124
07/13/16	162	256	207	215	140	121

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)

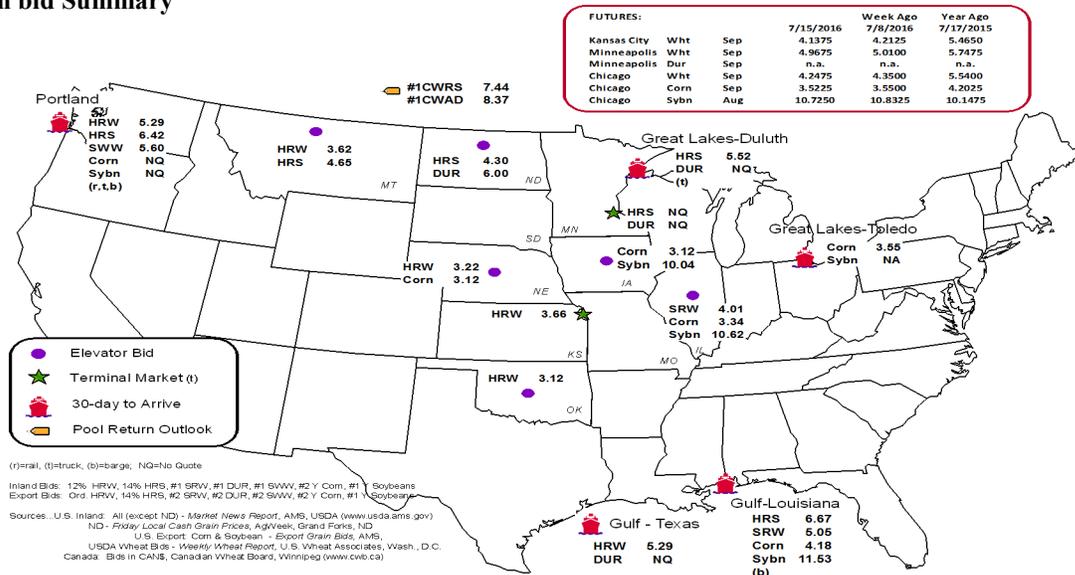
Commodity	Origin--Destination	7/15/2016	7/8/2016
Corn	IL--Gulf	-0.84	-0.83
Corn	NE--Gulf	-1.06	-1.05
Soybean	IA--Gulf	-1.49	-1.57
HRW	KS--Gulf	-1.63	-1.45
HRS	ND--Portland	-2.12	-2.05

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

The **grain bid summary** illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.

Figure 1
Grain bid Summary



Rail Transportation

Table 3

Rail Deliveries to Port (carloads)¹

For the Week Ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
7/13/2016 ^p	137	1,073	4,850	266	6,326	7/9/2016	1,933
7/06/2016 ^r	38	698	4,798	228	5,762	7/2/2016	2,342
2016 YTD ^r	6,457	40,599	138,399	10,106	195,561	2016 YTD	57,380
2015 YTD ^r	11,939	35,472	120,881	14,051	182,343	2015 YTD	49,724
2016 YTD as % of 2015 YTD	54	114	114	72	107	% change YTD	115
Last 4 weeks as % of 2015 ²	36	236	161	73	157	Last 4wks % 2015	104
Last 4 weeks as % of 4-year avg. ²	71	137	186	115	160	Last 4wks % 4 yr	124
Total 2015	29,054	60,819	239,029	26,730	355,632	Total 2015	97,736
Total 2014	44,617	83,674	256,670	32,107	417,068	Total 2014	98,422

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2015 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.

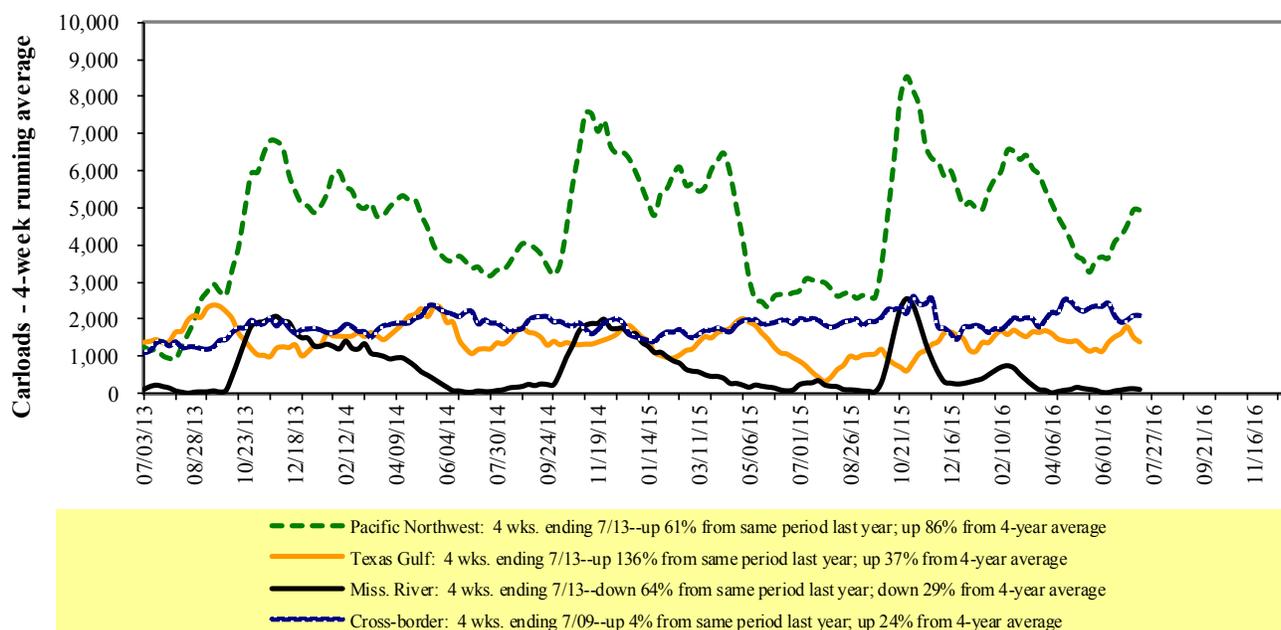
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

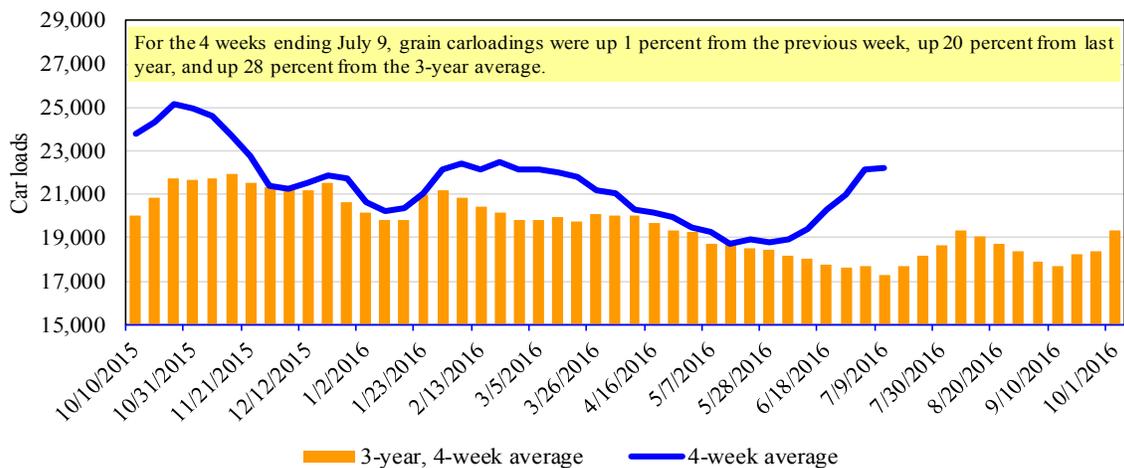
For the week ending:	East		West			U.S. total	Canada		
	7/9/2016	CSXT	NS	BNSF	KCS		UP	CN	CP
This week		1,350	2,438	10,931	773	5,254	20,746	3,365	4,104
This week last year		1,950	2,985	8,506	632	4,427	18,500	3,746	4,340
2016 YTD		48,141	75,064	277,667	23,102	140,486	564,460	85,918	115,212
2015 YTD		55,340	81,780	263,715	23,665	138,369	562,869	110,938	118,629
2016 YTD as % of 2015 YTD		87	92	105	98	102	100	77	97
Last 4 weeks as % of 2015*		81	101	144	95	109	120	76	93
Last 4 weeks as % of 3-yr avg.**		94	102	151	118	119	128	81	90
Total 2015		104,039	149,043	536,173	45,445	267,720	1,102,420	211,868	236,263

*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:		Delivery period							
7/14/2016		Jul-16	Jul-15	Aug-16	Aug-15	Sep-16	Sep-15	Oct-16	Oct-15
BNSF ³	COT grain units	no bids	n/a	34	17	23	12	18	19
	COT grain single-car ⁵	0..155	n/a	116..303	0..7	1..126	0..2	90	3
UP ⁴	GCAS/Region 1	no bids	n/a	no bids	no bids	10	no bids	n/a	no bids
	GCAS/Region 2	no bids	n/a	no bids	no bids	14	no bids	n/a	no bids

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.

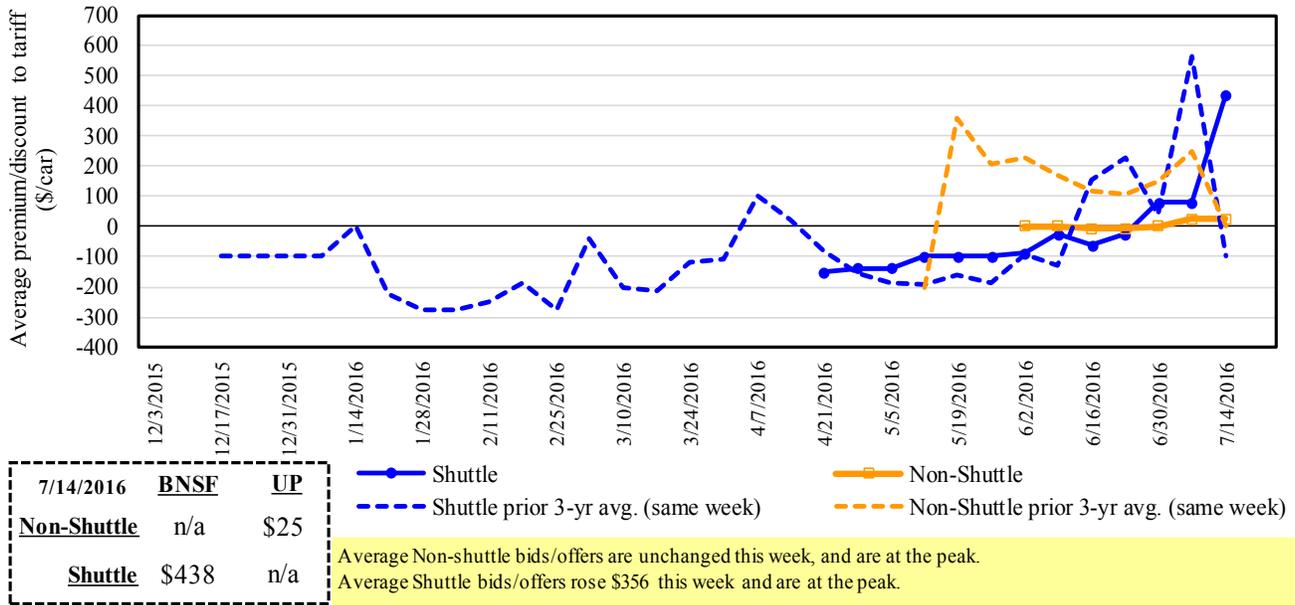
Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

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

Source: Transportation & Marketing Programs/AMS/USDA.

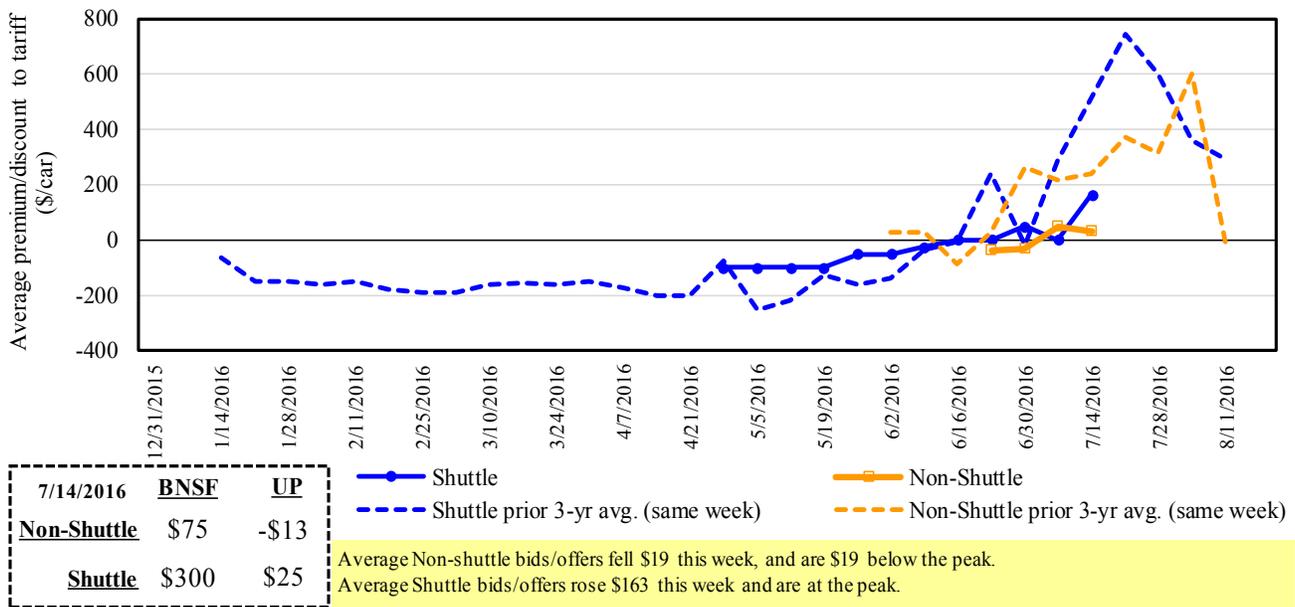
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/Offers for Railcars to be Delivered in July 2016, Secondary Market



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

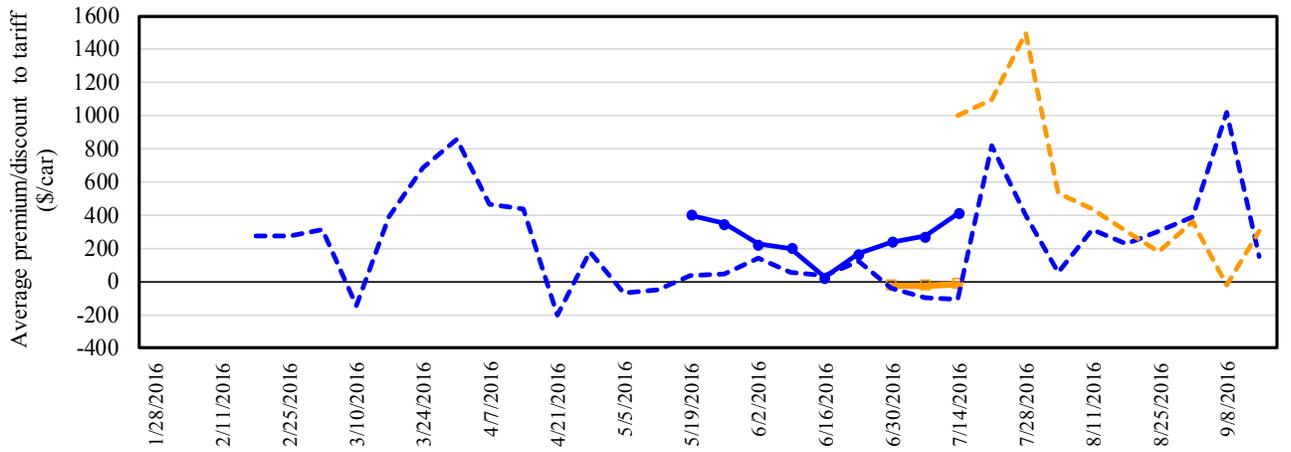
Figure 5
Bids/Offers for Railcars to be Delivered in August 2016, Secondary Market



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

Figure 6

Bids/Offers for Railcars to be Delivered in September 2016, Secondary Market



7/14/2016	BNSF	UP
Non-Shuttle	n/a	-\$13
Shuttle	\$800	\$25

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

Average Non-shuttle bids/offers rose \$13 this week, and are at the peak.
 Average Shuttle bids/offers rose \$140 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

Table 6

Weekly Secondary Railcar Market (\$/car)¹

For the week ending:		Delivery period					
		7/14/2016	Jul-16	Aug-16	Sep-16	Oct-16	Nov-16
Non-shuttle	BNSF-GF	n/a	75	n/a	n/a	n/a	n/a
	Change from last week	n/a	(50)	n/a	n/a	n/a	n/a
	Change from same week 2015	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	25	(13)	(13)	n/a	n/a	n/a
	Change from last week	25	13	13	n/a	n/a	n/a
	Change from same week 2015	n/a	51	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	438	300	800	1000	n/a	50
	Change from last week	275	n/a	306	n/a	n/a	63
	Change from same week 2015	n/a	313	800	350	n/a	n/a
	UP-Pool	n/a	25	25	350	n/a	n/a
	Change from last week	n/a	25	(25)	50	n/a	n/a
	Change from same week 2015	n/a	238	225	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 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

Effective date:					Tariff plus surcharge per:		Percent
7/1/2016	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	metric ton	bushel ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$25	\$36.05	\$0.98	-2
	Grand Forks, ND	Duluth-Superior, MN	\$3,463	-\$12	\$34.27	\$0.93	-17
	Wichita, KS	Los Angeles, CA	\$6,950	-\$61	\$68.41	\$1.86	-3
	Wichita, KS	New Orleans, LA	\$4,243	\$45	\$42.58	\$1.16	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	-\$50	\$63.91	\$1.74	-3
	Northwest KS	Galveston-Houston, TX	\$4,511	\$49	\$45.28	\$1.23	-2
	Amarillo, TX	Los Angeles, CA	\$4,710	\$68	\$47.45	\$1.29	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,681	\$50	\$37.05	\$0.94	7
	Toledo, OH	Raleigh, NC	\$6,061	\$0	\$60.19	\$1.53	9
	Des Moines, IA	Davenport, IA	\$2,168	\$11	\$21.64	\$0.55	-1
	Indianapolis, IN	Atlanta, GA	\$5,004	\$0	\$49.69	\$1.26	5
	Indianapolis, IN	Knoxville, TN	\$4,311	\$0	\$42.81	\$1.09	5
Soybeans	Des Moines, IA	Little Rock, AR	\$3,444	\$31	\$34.51	\$0.88	2
	Des Moines, IA	Los Angeles, CA	\$5,052	\$91	\$51.07	\$1.30	0
	Minneapolis, MN	New Orleans, LA	\$3,719	\$8	\$37.01	\$1.01	-4
	Toledo, OH	Huntsville, AL	\$5,051	\$0	\$50.16	\$1.37	8
	Indianapolis, IN	Raleigh, NC	\$6,178	\$0	\$61.35	\$1.67	10
Indianapolis, IN	Huntsville, AL	\$4,529	\$0	\$44.98	\$1.22	4	
Champaign-Urbana, IL	New Orleans, LA	\$4,395	\$50	\$44.14	\$1.20	8	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,853	-\$35	\$37.91	\$1.03	-6
	Wichita, KS	Galveston-Houston, TX	\$3,871	-\$27	\$38.17	\$1.04	-4
	Chicago, IL	Albany, NY	\$5,492	\$0	\$54.54	\$1.48	16
	Grand Forks, ND	Portland, OR	\$5,511	-\$61	\$54.12	\$1.47	-5
	Grand Forks, ND	Galveston-Houston, TX	\$5,831	-\$63	\$57.28	\$1.56	-14
	Northwest KS	Portland, OR	\$5,478	\$80	\$55.19	\$1.50	-3
	Corn	Minneapolis, MN	Portland, OR	\$5,000	-\$74	\$48.92	\$1.24
Sioux Falls, SD		Tacoma, WA	\$4,960	-\$68	\$48.58	\$1.23	-8
Champaign-Urbana, IL		New Orleans, LA	\$3,481	\$50	\$35.07	\$0.89	7
Lincoln, NE		Galveston-Houston, TX	\$3,600	-\$40	\$35.36	\$0.90	-4
Des Moines, IA		Amarillo, TX	\$3,795	\$39	\$38.08	\$0.97	0
Minneapolis, MN		Tacoma, WA	\$5,000	-\$73	\$48.92	\$1.24	-8
Council Bluffs, IA		Stockton, CA	\$4,640	-\$76	\$45.32	\$1.15	-5
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,490	-\$68	\$53.85	\$1.47	-7
	Minneapolis, MN	Portland, OR	\$5,510	-\$74	\$53.98	\$1.47	-8
	Fargo, ND	Tacoma, WA	\$5,380	-\$60	\$52.83	\$1.44	-7
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$58	\$44.52	\$1.21	-3
	Toledo, OH	Huntsville, AL	\$4,226	\$0	\$41.97	\$1.14	10
Grand Island, NE	Portland, OR	\$5,360	\$82	\$54.04	\$1.47	-3	

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

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

³Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

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

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel surcharge per car ²	Tariff plus surcharge per:		Percent change ⁴ Y/Y
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,459	\$0	\$76.21	\$2.07	-4
	OK	Cuautitlan, EM	\$6,514	\$35	\$66.91	\$1.82	-5
	KS	Guadalajara, JA	\$6,995	\$84	\$72.33	\$1.97	-4
	TX	Salinas Victoria, NL	\$4,142	\$20	\$42.52	\$1.16	0
Corn	IA	Guadalajara, JA	\$8,137	\$78	\$83.93	\$2.13	-6
	SD	Celaya, GJ	\$7,480	\$0	\$76.43	\$1.94	-6
	NE	Querretaro, QA	\$7,879	\$66	\$81.18	\$2.06	0
	SD	Salinas Victoria, NL	\$6,545	\$0	\$66.87	\$1.70	6
	MO	Tlalnepantla, EM	\$7,238	\$64	\$74.61	\$1.89	1
	SD	Torreon, CU	\$7,080	\$0	\$72.34	\$1.84	-2
Soybeans	MO	Bojay (Tula), HG	\$8,652	\$79	\$89.21	\$2.43	1
	NE	Guadalajara, JA	\$9,142	\$82	\$94.25	\$2.56	0
	IA	El Castillo, JA	\$9,470	\$0	\$96.76	\$2.63	0
	KS	Torreon, CU	\$7,439	\$58	\$76.60	\$2.08	1
Sorghum	NE	Celaya, GJ	\$7,344	\$71	\$75.76	\$1.92	-3
	KS	Querretaro, QA	\$7,563	\$44	\$77.72	\$1.97	2
	NE	Salinas Victoria, NL	\$6,168	\$35	\$63.37	\$1.61	2
	NE	Torreon, CU	\$6,672	\$56	\$68.74	\$1.74	-2

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.

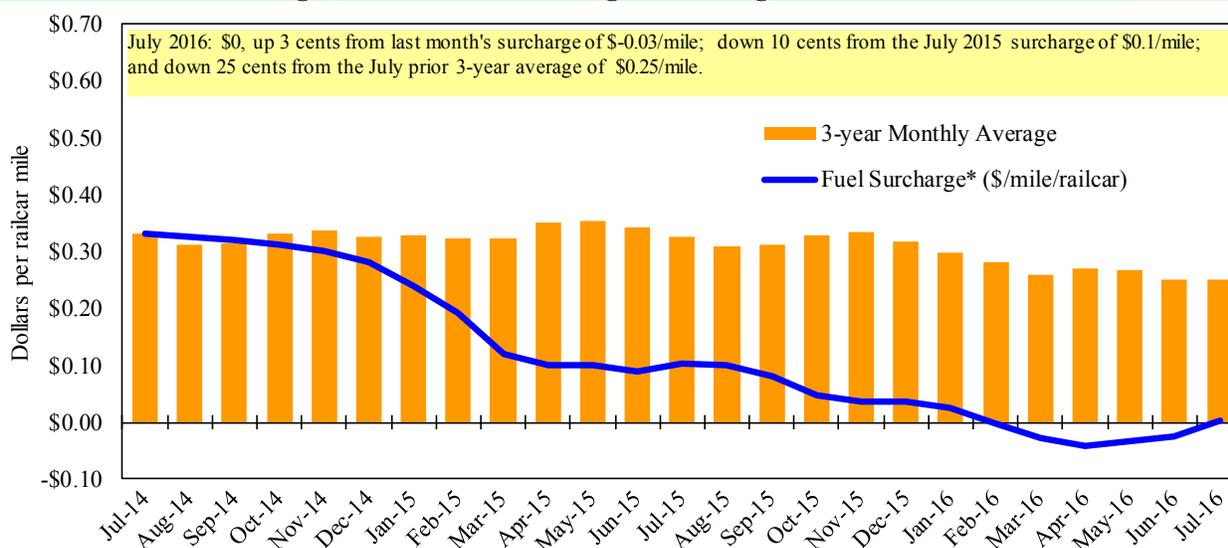
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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.

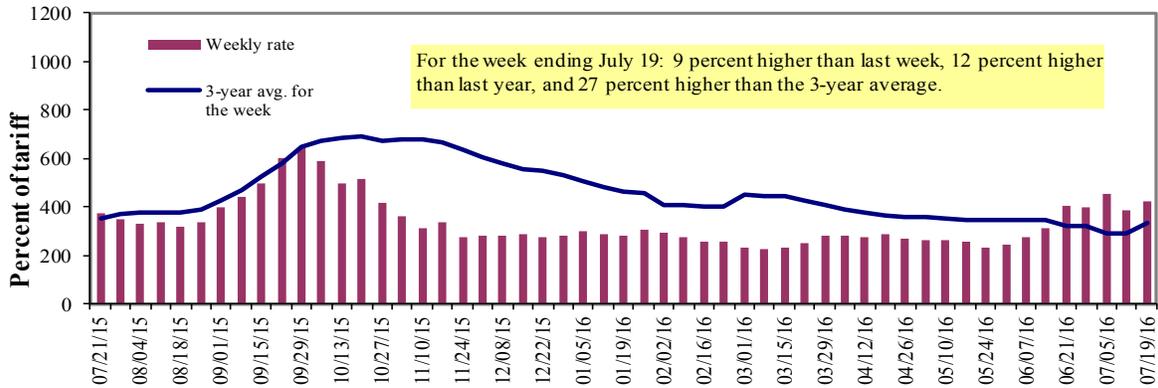
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	7/19/2016	518	456	422	300	292	292	273
	7/12/2016	455	413	388	270	270	270	233
\$/ton	7/19/2016	32.06	24.26	19.58	11.97	13.69	11.80	8.57
	7/12/2016	28.16	21.97	18.00	10.77	12.66	10.91	7.32
Current week % change from the same week:								
	Last year	18	17	12	12	-7	-7	24
	3-year avg. ²	11	43	27	11	4	4	23
Rate¹	August	525	483	455	350	368	368	363
	October	655	635	635	520	628	628	508

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

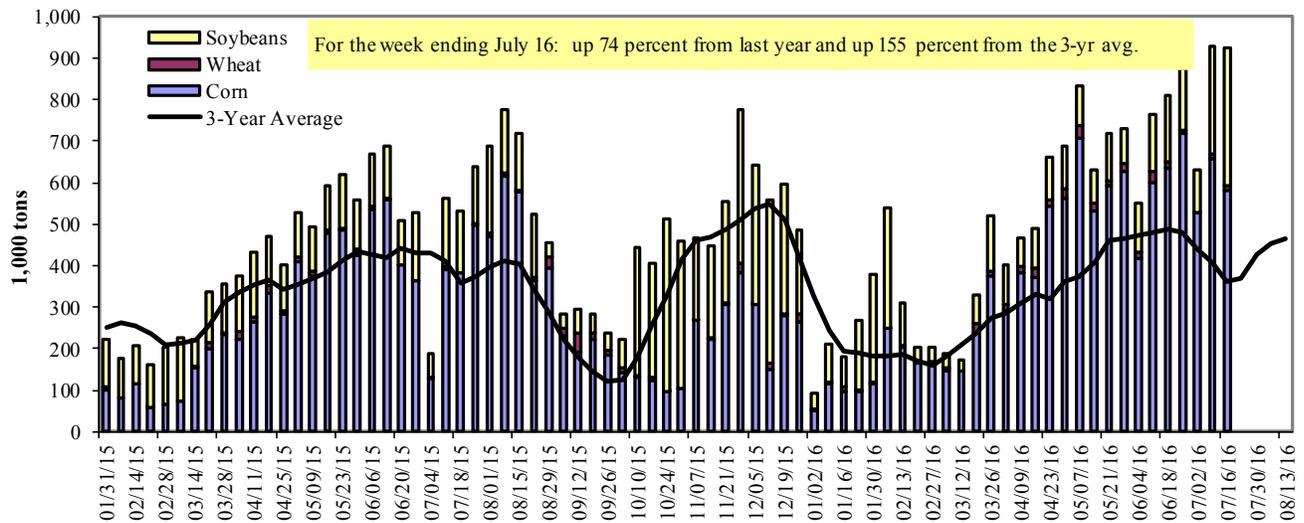
(Rate * 1976 tariff benchmark rate per ton)/100

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



Figure 10

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



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

Source: U.S. Army Corps of Engineers

Table 10

Barge Grain Movements (1,000 tons)

For the week ending 7/16/2016	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	227	2	154	0	382
Winfield, MO (L25)	418	6	230	2	656
Alton, IL (L26)	597	10	357	2	965
Granite City, IL (L27)	583	10	331	0	924
Illinois River (L8)	164	2	91	0	256
Ohio River (L52)	12	38	61	0	111
Arkansas River (L1)	0	50	1	0	51
Weekly total - 2016	595	97	394	0	1,086
Weekly total - 2015	471	69	181	8	728
2016 YTD ¹	13,523	1,167	5,778	168	20,636
2015 YTD	11,540	869	5,707	133	18,249
2016 as % of 2015 YTD	117	134	101	126	113
Last 4 weeks as % of 2015 ²	154	117	147	86	148
Total 2015	19,215	1,686	14,191	359	35,451

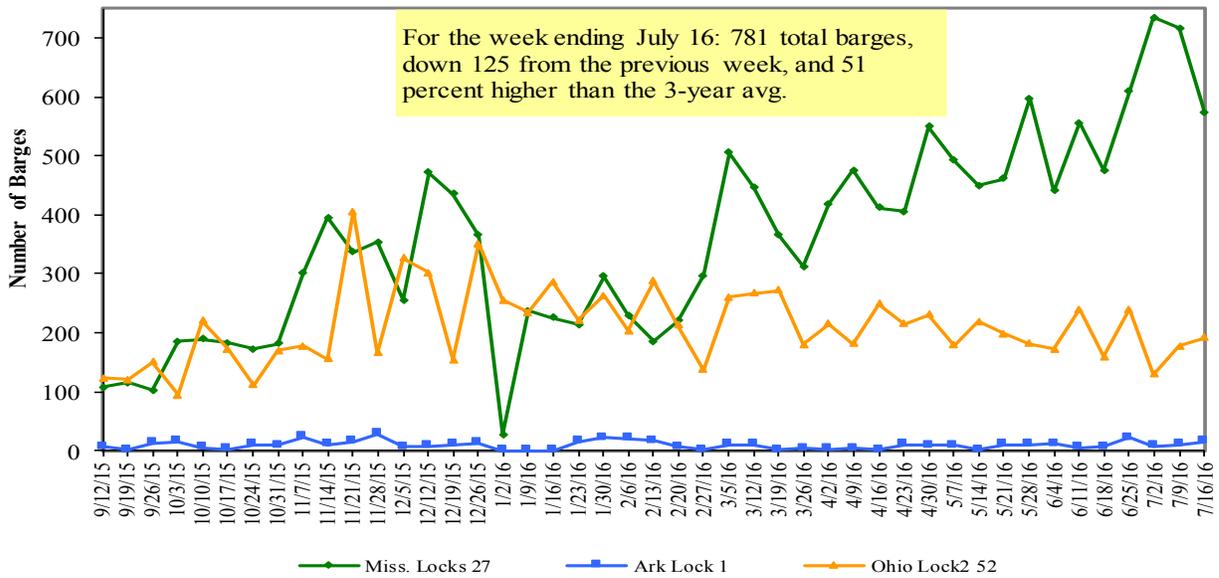
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2015.

Note: Total may not add exactly, due to rounding

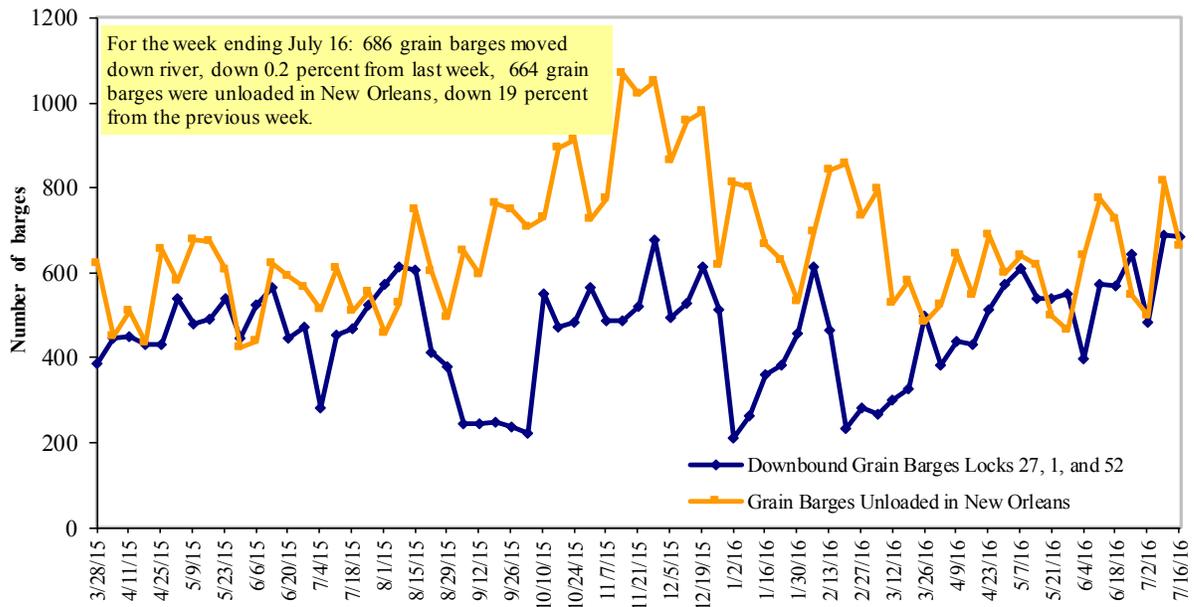
Source: U.S. Army Corps of Engineers

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 7/18/2016 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.411	-0.013	-0.462
	New England	2.446	-0.023	-0.550
	Central Atlantic	2.503	-0.018	-0.482
	Lower Atlantic	2.332	-0.009	-0.430
II	Midwest ²	2.369	-0.016	-0.310
III	Gulf Coast ³	2.262	0.001	-0.412
IV	Rocky Mountain	2.435	-0.010	-0.335
V	West Coast	2.686	-0.022	-0.318
	West Coast less California	2.569	-0.027	-0.304
	California	2.780	-0.018	-0.331
Total	U.S.	2.402	-0.012	-0.380

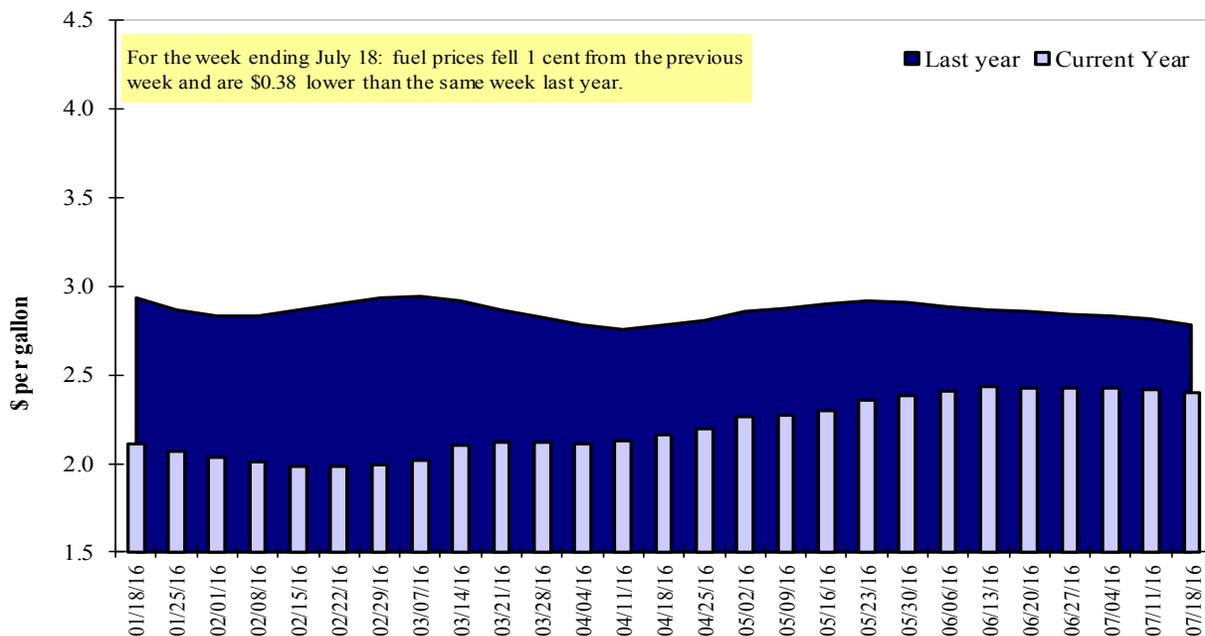
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
7/7/2016	2,301	615	2,227	1,075	103	6,321	11,236	7,193	24,750
This week year ago	1,178	888	1,553	991	191	4,800	8,227	2,565	15,592
Cumulative exports-marketing year²									
2015/16 YTD	994	212	792	434	25	2,457	36,684	44,470	83,611
2014/15 YTD	590	388	415	201	90	1,683	38,314	48,000	87,997
YTD 2015/16 as % of 2014/15	169	55	191	216	28	146	96	93	95
Last 4 wks as % of same period 2014/15	176	77	141	110	63	128	150	260	162
2014/15 Total	7,009	3,654	7,250	3,758	665	22,336	45,205	49,614	117,155
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309

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 7/07/2016	Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2012-2014
	2016/17	2015/16	2014/15		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	1,319	10,446	11,386	(8)	9,244
Mexico	2,212	12,422	10,562	18	7,448
Korea	138	2,839	3,668	(23)	2,630
Colombia	93	4,595	4,175	10	1,727
Taiwan	112	2,062	2,024	2	1,224
Top 5 Importers	3,874	32,365	31,816	2	22,273
Total US corn export sales	6,174	47,920	46,541	3	34,445
% of Projected	12%	99%	98%		
Change from prior week	688	668	331		
Top 5 importers' share of U.S. corn export sales	63%	68%	68%		65%
USDA forecast, July 2016	52,163	48,346	47,430	2	
Corn Use for Ethanol USDA forecast, July 2016	133,985	132,715	132,080	0	

(n) indicates negative number.

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

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

Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--<http://www.fas.usda.gov/esrquery/>

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

Table 14

Top 5 Importers¹ of U.S. Soybeans

For the week ending 7/07/2016	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2012-2014
	2016/17	2015/16	2014/15		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
China	3,421	27,829	29,984	(7)	24,211
Mexico	677	3,323	3,378	(2)	2,971
Indonesia	37	1,874	1,776	5	1,895
Japan	191	2,250	2,118	6	1,750
Taiwan	206	1,285	1,322	(3)	1,055
Top 5 importers	4,532	36,560	38,579	(5)	31,882
Total US soybean export sales	8,146	51,662	50,565	2	39,169
% of Projected	16%	106%	101%		
Change from prior week	547	364	45		
Top 5 importers' share of U.S. soybean export sales	56%	71%	76%		81%
USDA forecast, July 2016	52,316	48,910	50,218	(3)	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--http://www.fas.usda.gov/esrquery/. Total commitments change from prior week could include revisions from previous week's outstanding sales and/or accumulated sales³FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

For the week ending 7/07/2016	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2013-2015
	2016/17	2015/16		
	Current MY	Last MY		
		- 1,000 mt -		- 1,000 mt -
Japan	587	515	14	2,743
Mexico	769	635	21	2,660
Nigeria	332	626	(47)	1,978
Philippines	827	494	67	2,156
Brazil	232	153	52	2,273
Korea	464	378	23	1,156
Taiwan	262	290	(10)	923
Indonesia	165	136	21	790
Colombia	281	162	74	664
Thailand	220	136	62	685
Top 10 importers	3,919	3,388	16	16,028
Total US wheat export sales	8,779	6,483	35	24,059
% of Projected	35%	31%		
Change from prior week	318	291		
Top 10 importers' share of U.S. wheat export sales	45%	52%		67%
USDA forecast, July 2016	25,204	21,117	19	

(n) indicates negative number.

¹Based on FAS Marketing Year Ranking Reports - 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 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 07/14/16	Previous Week*	Current Week as % of Previous	2016 YTD*	2015 YTD*	2016 YTD as % of 2015 YTD	Last 4-weeks as % of:		2015 Total*
							Last Year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	169	165	102	6,486	5,851	111	140	127	10,985
Corn	441	350	126	6,038	5,565	108	173	269	7,232
Soybeans	11	0	n/a	4,446	4,060	110	364	1086	11,809
Total	621	516	120	16,970	15,476	110	161	198	30,027
Mississippi Gulf									
Wheat	83	104	80	1,994	2,317	86	86	57	4,504
Corn	625	817	76	17,064	16,791	102	110	141	26,701
Soybeans	299	317	94	10,548	11,224	94	110	188	29,593
Total	1,007	1,238	81	29,605	30,332	98	108	131	60,797
Texas Gulf									
Wheat	152	81	188	2,107	2,224	95	199	113	3,724
Corn	29	30	100	561	301	186	378	463	596
Soybeans	0	0	n/a	92	210	44	n/a	n/a	864
Total	181	110	164	2,761	2,735	101	217	130	5,184
Interior									
Wheat	26	36	74	687	748	92	77	101	1,388
Corn	183	117	157	3,826	3,311	116	133	176	6,201
Soybeans	46	45	101	2,117	1,845	115	194	229	3,518
Total	255	197	129	6,630	5,903	112	137	176	11,106
Great Lakes									
Wheat	32	14	233	326	273	120	414	515	997
Corn	22	19	113	186	249	75	54	112	485
Soybeans	24	0	n/a	47	89	53	106	318	733
Total	77	33	235	559	610	92	131	250	2,216
Atlantic									
Wheat	1	1	n/a	185	412	45	3	4	520
Corn	0	0	n/a	14	89	15	0	0	277
Soybeans	7	36	20	935	955	98	286	567	2,053
Total	9	36	23	1,134	1,456	78	39	51	2,850
U.S. total from ports**									
Wheat	463	400	116	11,785	11,824	100	127	100	22,118
Corn	1,301	1,333	98	27,688	26,306	105	128	171	41,492
Soybeans	386	398	97	18,185	18,382	99	129	208	48,570
Total	2,149	2,130	101	57,659	56,512	102	128	151	112,180

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

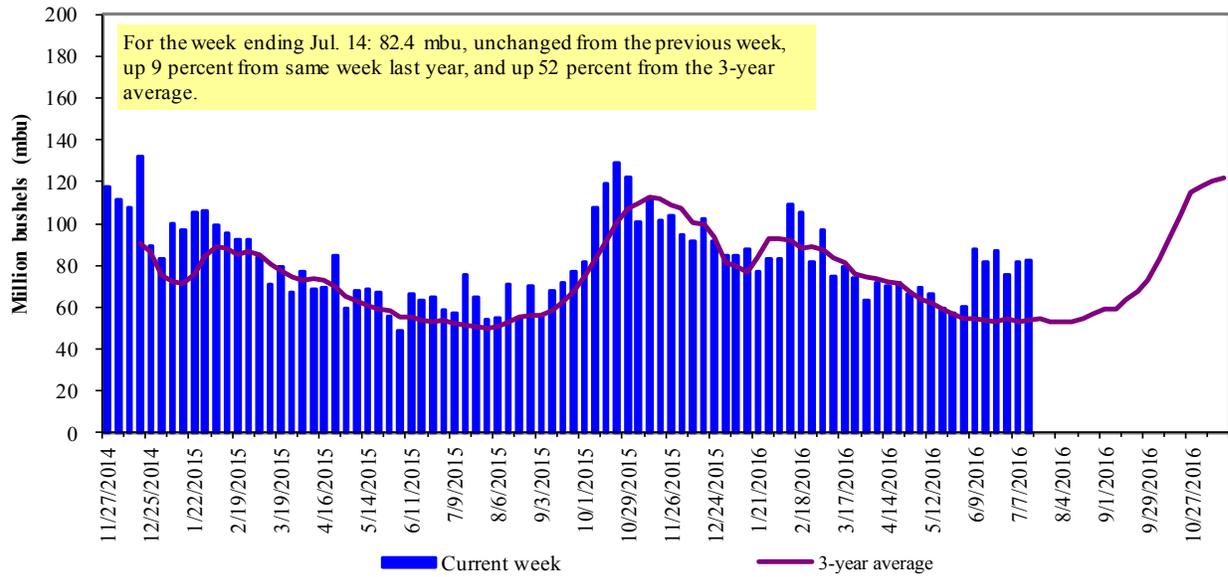
**Total only includes regions shown above

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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2015.

Figure 14

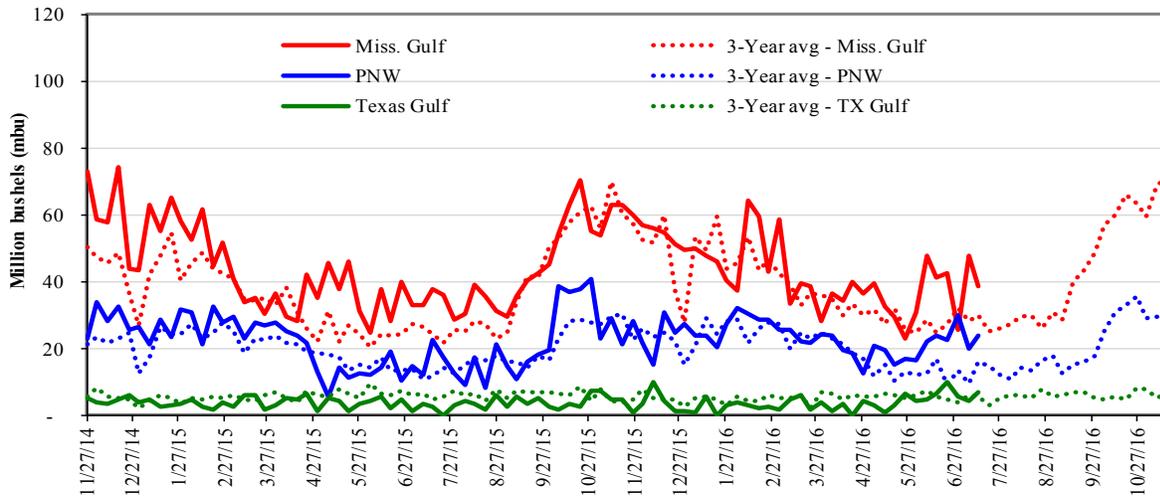
U.S. grain inspected for export (wheat, corn, and soybeans)



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 07/14/16 inspections (mbu):		Percent change from:				
Mississippi Gulf:	38.6	Last Week:	MS Gulf	TX Gulf	U.S. Gulf	PNW
PNW:	24.0	Last Year (same week):	down 19	up 63	down 12	up 21
Texas Gulf:	6.7	3-yr avg. (4-wk. mov. Avg):	up 2	up 154	up 12	up 6
			up 31	up 33	up 31	up 100

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

Ocean Transportation

Table 17

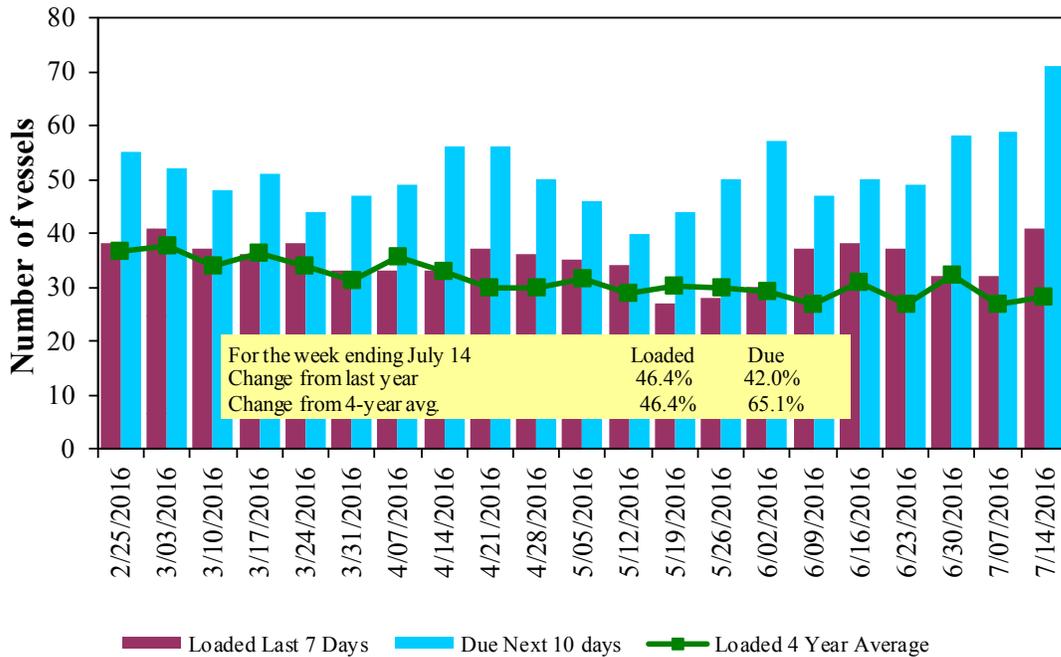
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
7/14/2016	37	41	71	8	n/a
7/7/2016	38	32	59	8	n/a
2015 range	(25..54)	(28..54)	(36..80)	(3..26)	n/a
2015 avg.	42	38	56	11	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

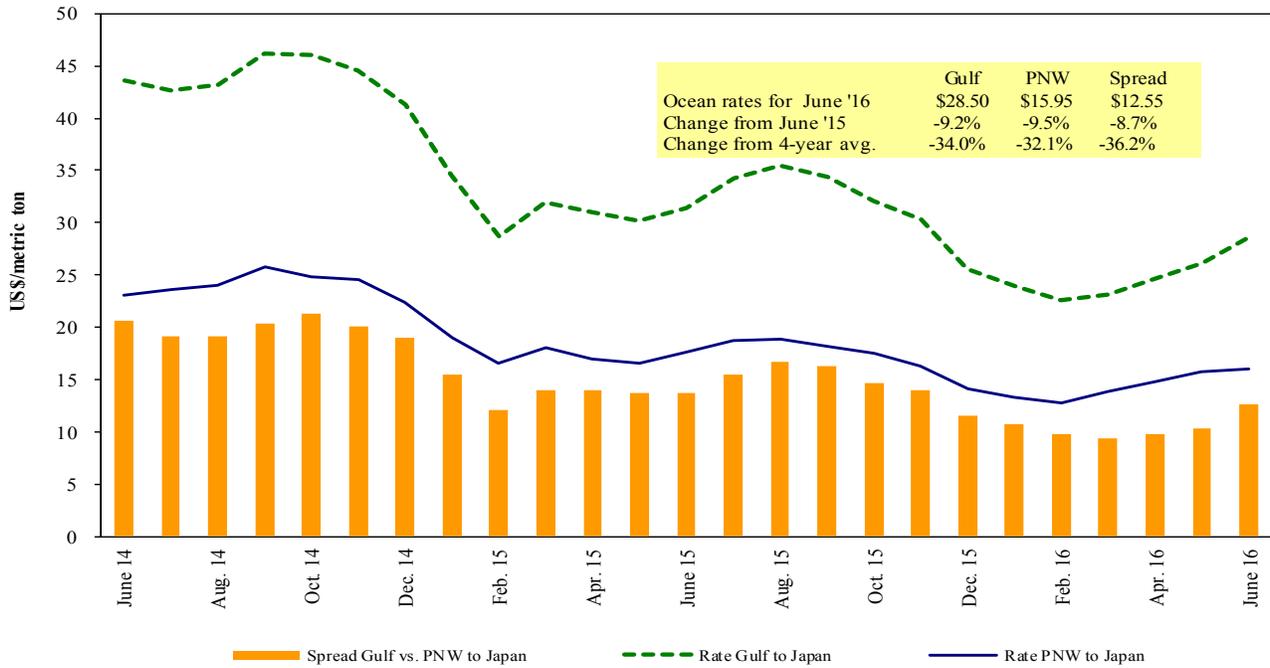
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

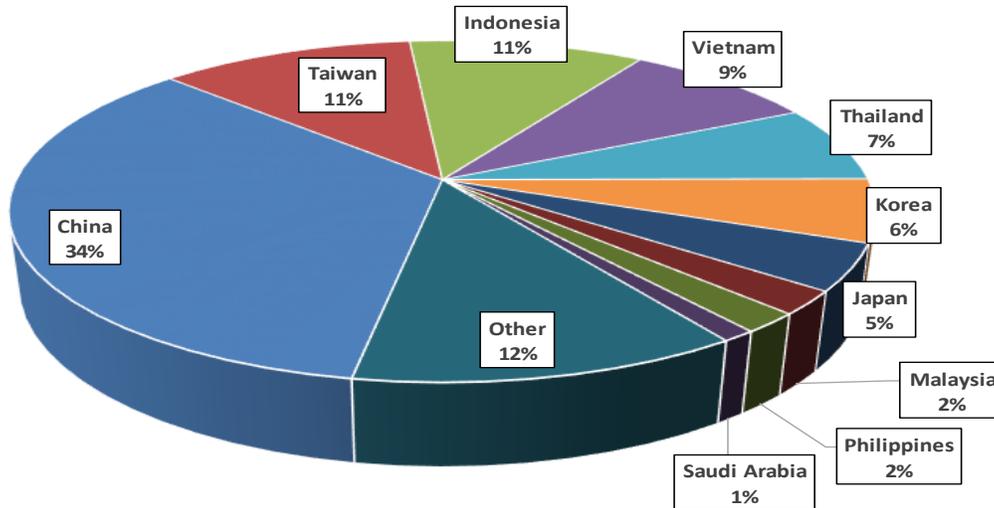
Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 07/16/2016

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Jul 20/30	60,000	19.50
U.S. Gulf	China	Heavy Grain	Jun 7/17	66,000	17.50
U.S. Gulf	China	Heavy Grain	May 20/30	60,000	18.25
U.S. Gulf	Tanzania	Wheat ¹	June 20/29	13,000	35.67
U.S. Gulf	Djibouti or Pt Sudan	Wheat ¹	Jul 1/10	51,000	47.25 op 46.00
PNW	Japan	Heavy Grain	Aug 1/10	58,000	19.80
PNW	Japan	Heavy Grain	Jul 20/30	60,000	16.50
PNW	Japan	Heavy Grain	Jul 5/15	60,000	15.10
PNW	Japan	Heavy Grain	Jun 20/Jul 1	60,000	15.90
PNW	Japan	Heavy Grain	Jun 20/Jul 1	60,000	15.00
PNW	Japan	Heavy Grain	May 17/26	59,800	15.45
Albany	Me Gulf	Grain	Jun 17/25	53,000	13.85
Brazil	Japan	Heavy Grain	Sep 1/30	62,000	19.00
Brazil	China	Heavy Grain	Jun 28/Jul 4	60,000	18.00
Brazil	China	Heavy Grain	June 20/30	60,000	19.00
Brazil	China	Heavy Grain	May 20/30	60,000	18.25
Brazil	China	Heavy Grain	May 1/20	60,000	15.50
EC S America	China	Heavy Grain	May/June	60,000	14.75
River Plate	China	Heavy Grain	Jun 23/30	60,000	22.60
Ukraine	Spain	Heavy Grain	May 22/26	60,000	10.50

In 2014, containers were used to transport 7 percent of total U.S. waterborne grain exports. Approximately 63 percent of U.S. waterborne grain exports in 2014 went to Asia, of which 11 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

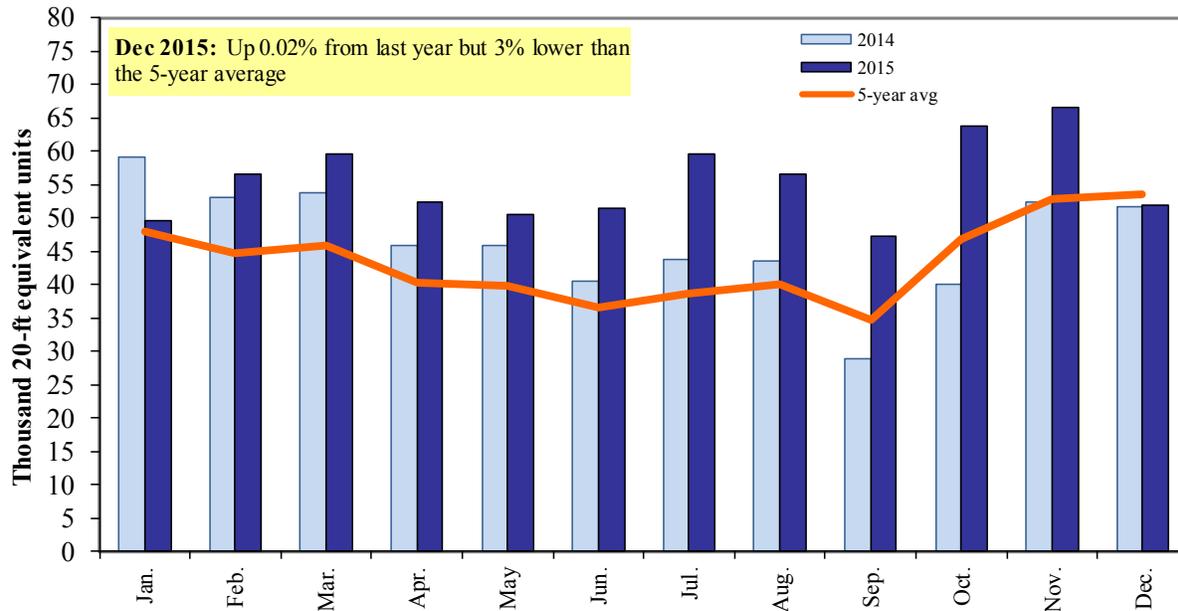
Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January–December 2015



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

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

Figure 19
Monthly Shipments of Containerized Grain to Asia



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

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

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