



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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February 11, 2021

WEEKLY HIGHLIGHTS

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Notice Issued on Compliance With Panama Canal Shipboard Oil Pollution Emergency Plan

Effective January 18, 2021, vessels determined to be noncompliant with the Panama Canal Shipboard Oil Pollution Emergency Plan (PCSOPEP) regulations will be scheduled for transit only after satisfying [several requirements](#). The regulations cover contingency plans for oil spills in Panama Canal waters for certain vessels. Grain vessels affected by the regulations—including Panamax, Neopanamax, and some Handymax—have a carrying capacity for oil, as fuel, of 400 metric tons or more. In addition to the minimum \$2,500 sanction, noncompliant Panamax and Neopanamax vessels may incur additional charges because of their size. Panama Canal is a vital outlet for grain shipped from the United States and destined to Asia.

STB Extends Deadline for Comments on Railroad Petition To Modify Determination on Revenue Adequacy

On February 4, the [Surface Transportation Board \(STB\)](#) extended the [comment period](#) to consider a petition by three Class I railroads. As highlighted in [last week's GTR](#), the railroads seek changes in STB's procedures for determining whether Class I rail carriers are revenue adequate. The petitioners are directed to file workpapers to replicate the analysis used in their proposal to the STB by February 22, 2021. Comments from interested parties are now due by May 17, 2021, and replies, by June 16, 2021.

California Asks FMC To Take Action on Agricultural Shipping Delays

In a letter dated January 28, the State of California asked the Federal Maritime Commission (FMC) to [take immediate action on port congestion](#). The action would aim to help agriculture exporters facing rising costs and delays resulting from the surge of import traffic in the fall and winter of 2020. The letter proposes steps, such as suspending or reducing detention and demurrage charges and canceling congestion surcharges. Other proposed remedies were better communication to exporters and truckers about timeframes to return empty containers, as well as reviewing rules regarding detention and demurrage practices.

Snapshots by Sector

Export Sales

For the week ending January 28, [unshipped balances](#) of wheat, corn, and soybeans totaled 53.6 million metric tons (mmt). This is 11 percent higher from last week and represented a significant increase in outstanding sales from the same time last year. Net [corn export sales](#) were 7.437 mmt, up significantly from the past week. Net [soybean export sales](#) were 0.824 mmt, up 77 percent from the previous week. Net [wheat export sales](#) were 0.643 mmt, up 69 percent from the previous week.

Rail

U.S. Class I railroads originated 27,482 [grain carloads](#) during the week ending January 30. This was a 1-percent increase from the previous week, 43 percent more than last year, and 31 percent more than the 3-year average.

Average February shuttle [secondary railcar](#) bids/offers (per car) were \$81 below tariff for the week ending February 4. This was \$180 less than last week and \$198 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending February 6, [barge grain movements](#) totaled 793,208 tons. This was 23 percent lower than the previous week and 45 percent more than the same period last year.

For the week ending February 6, 476 grain barges [moved down river](#)—142 barges fewer than the previous week. There were 1,046 grain barges [unloaded in New Orleans](#), 17 percent higher than the previous week.

Ocean

For the week ending February 4, 45 [oceangoing grain vessels](#) were loaded in the Gulf—50 percent more than the same period last year. Within the next 10 days (starting February 6, 2021), 58 vessels were expected to be loaded—45 percent more than the same period last year.

As of February 4, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$46.75. This was 1 percent more than the previous week. The rate from PNW to Japan was \$26.75 per mt, unchanged from the previous week.

Fuel

For the week ending February 8, the U.S. average [diesel fuel price](#) increased 6.3 cents from the previous week to \$2.801 per gallon, 10.9 cents below the same week last year.

Feature Article/Calendar

Better Farm Prices Pushed Up Landed Costs for Grain to Mexico in Fourth Quarter 2020

Mexico is the leading importer of U.S. corn (*GTR table 13*), second largest importer of U.S. soybeans (*GTR table 14*) and largest importer of U.S. wheat (*GTR table 15*). As of January 28, 2021, Mexico's total commitments were 11.08 million metric tons (mmt) of U.S. corn, 3.96 mmt of U.S. soybeans, and 2.95 mmt of U.S. wheat. Given Mexico's prominence as a destination for U.S. grain exports, low transportation costs and landed costs to Mexico are critical to the competitiveness of U.S. grain.

U.S. grain is transported to Mexico either by cross-border land movements or by seaborne movements to Mexican ports for inland distribution. This article examines the costs of transporting U.S. grain to Mexico over land to Guadalajara (land route) and by water to Veracruz (water route), tracking changes over time (see table).

Quarterly costs of transporting U.S. grain to Veracruz and Guadalajara, Mexico										
	Water route (to Veracruz)					Land route (to Guadalajara)				
	\$/metric ton					\$/metric ton				
	2019 4 th qtr.	2020 3 rd qtr.	2020 4 th qtr.	Percent change Yr. to yr.	Qtr. to qtr.	2019 4 th qtr.	2020 3 rd qtr.	2020 4 th qtr.	Percent change Yr. to yr.	Qtr. to qtr.
Corn										
Origin	IL					IA				
Truck	11.46	12.38	11.38	-0.7	-8.1	4.19	3.93	4.85	15.8	23.4
Rail ¹						96.23	94.63	94.04	-2.3	-0.6
Barge ²	18.46	21.58	25.88	40.2	19.9					
Ocean ³	15.23	14.39	14.43	-5.3	0.3					
Total transportation cost	45.15	48.35	51.69	14.5	6.9	100.42	98.56	98.89	-1.5	0.3
Farm value ⁴	146.45	128.34	147.50	0.7	14.9	146.06	126.11	150.65	3.1	19.5
Landed cost ⁵	191.60	176.69	199.19	4.0	12.7	246.48	224.67	249.54	1.2	11.1
Transport % of landed cost	24	27	26			41	44	40		
Soybeans										
Origin	IL					NE				
Truck	11.46	12.38	11.38	-0.7	-8.1	4.19	3.93	4.85	15.8	23.4
Rail						98.86	97.11	96.55	-2.3	-0.6
Barge	18.46	21.58	25.88	40.2	19.9					
Ocean	15.23	14.39	14.43	-5.3	0.3					
Total transportation cost	45.15	48.35	51.69	14.5	6.9	103.05	101.04	101.40	-1.6	0.4
Farm value	329.96	331.06	370.25	12.2	11.8	304.12	312.61	368.05	21.0	17.7
Landed cost	375.11	379.41	421.94	12.5	11.2	407.17	413.65	469.45	15.3	13.5
Transport % of landed cost	12	13	12			25	24	22		
Wheat										
Origin	KS					KS				
Truck	4.19	3.93	4.85	15.8	23.4	4.19	3.93	4.85	15.8	23.4
Rail	43.31	42.07	42.07	-2.9	0.0	83.13	81.17	80.17	-3.6	-1.2
Ocean	15.23	14.39	14.43	-5.3	0.3					
Total transportation cost	62.73	60.39	61.35	-2.2	1.6	87.32	85.10	85.02	-2.6	-0.1
Farm value	142.57	158.37	193.39	35.6	22.1	142.57	158.37	193.39	35.6	22.1
Landed cost	205.30	218.76	254.74	24.1	16.4	229.89	243.47	278.41	21.1	14.4
Transport % of landed cost	31	28	24			38	35	31		

¹ Rail rates include U.S. and Mexico portions of the movement. Mexico rail rates are estimated based on actual quoted market rates.

BNSF and Union Pacific quoted rail tariff rates are through rates for shuttle trains. Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary market, which could exceed the rail tariff rate plus fuel surcharge shown in the table.

² Due to the closure of several lock and dam facilities on Illinois River between July 1 and October 27, 2020, mid-Mississippi barge rate was substituted for Illinois rate as the benchmark for calculating cost index during the closures.

³ Source for ocean freight rates: O'Neil Commodity Consulting.

⁴ Source for farm values: USDA, National Agricultural Statistics Service.

⁵ Landed cost is total transportation cost plus farm value.

Note: Total may not add exactly because of rounding.

Source: Compiled by the USDA, Agricultural Marketing Service.

Quarter-to-quarter transportation costs. From third to fourth quarter 2020 (quarter to quarter), total costs of shipping U.S. corn and soybeans to Mexico via the water route rose mainly because of higher barge rates, while higher truck rates pushed up the cost of shipping wheat by the water route.¹ For the land route, a decrease in rail (public tariff plus fuel surcharge) costs offset the increase in the truck rates. Thus, land-route transportation costs—

¹ Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

of which rail rates comprise a large majority—did not change. Barge rates rose partly in response to strong demand and unstable supply of barges for grain exports in the fourth quarter ([GTR, January 28, 2021](#)). Exports out of the Mississippi Gulf have been at record levels ([GTR table 16](#)). At the same time, low water levels in the Lower Mississippi River forced the barge industry to restrict drafts and tow sizes, which delayed departures and lengthened transit times. Some shippers might also have had difficulties positioning empty barges as scheduled.

Year-to-year transportation costs. From fourth quarter 2019 to fourth quarter 2020 (year to year), the total costs of shipping U.S. corn and soybeans to Mexico by the water route increased because of higher barge rates. Meanwhile, lower rail tariff rates pushed down costs of shipping wheat to Mexico by the water route. Similarly, the costs of shipping all grain (corn, soybeans, and wheat) to Mexico by the land route fell with declining rail tariff rates.

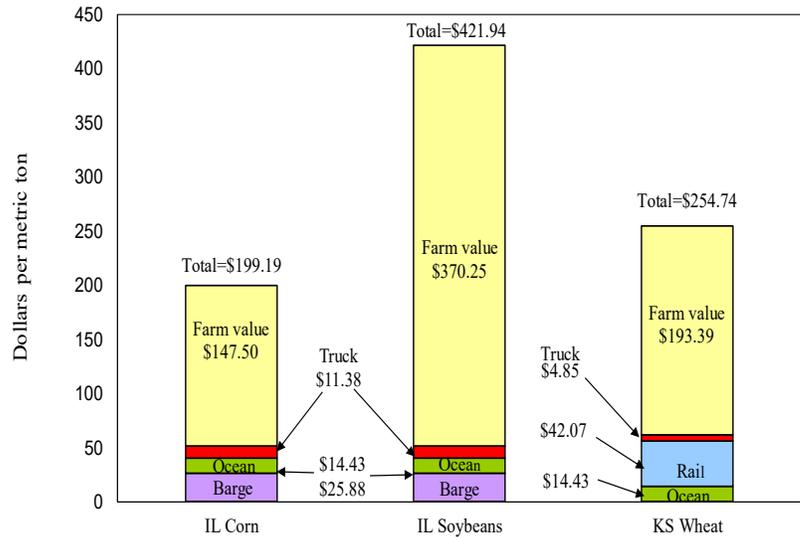
Quarter-to-quarter landed costs. From quarter to quarter, landed costs increased for all grains shipped via both routes. For all waterborne grain, landed costs rose because of higher transport costs and higher farm values (table 1 and fig. 1). For all grain via the land route, higher farm values were the main drivers of higher landed costs (table 1 and fig. 2). The transportation share of landed costs ranged from 12 percent to 26 percent for the water route and from 22 percent to 40 percent for the land route (see table).

Year-to-year landed costs. From year to year, landed costs increased for waterborne corn and soybeans because of higher transportation costs and farm values. For waterborne wheat and all grains shipped by land routes, higher farm values mainly drove rising landed costs.

U.S. Exports to Mexico: According to USDA’s Federal Grain Inspection Service, Mexico imported 3.44 mmt of U.S. corn, 1.43 mmt of U.S. soybeans, and 0.67 mmt of U.S. wheat in fourth quarter 2020. Quarter to quarter, these imports amounted to 6 percent more corn and 37 percent more soybeans, but 7 percent less wheat. Year to year, U.S. inspections for export to Mexico rose by 12 percent for corn and 10 percent for soybeans, while falling 22 percent for wheat.

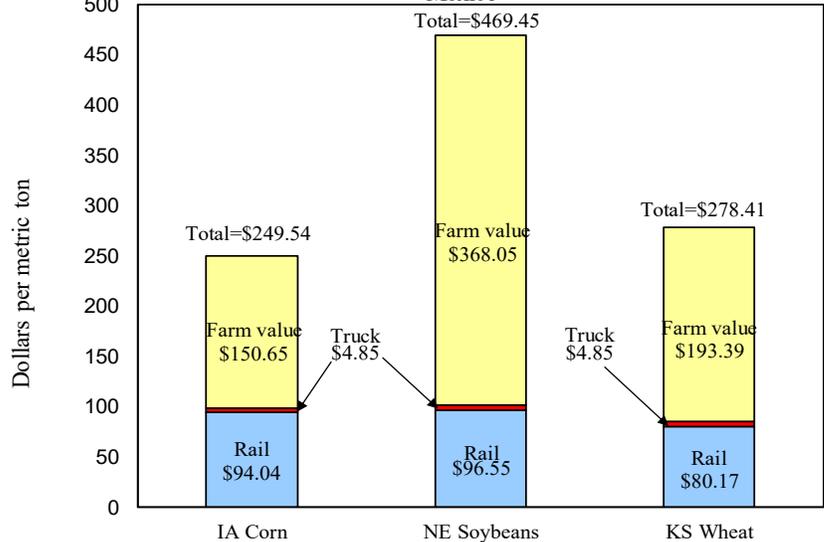
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Figure 1. Fourth-quarter water-route landed costs to Veracruz, Mexico



Note: IL = Illinois; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Figure 2. Fourth-quarter land-route landed costs to Guadalajara, Mexico



Note: IA = Iowa; NE = Nebraska; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail	Barge	Ocean	
		Unit train	Shuttle	Gulf	Pacific
02/10/21	188	307	219	209	190
02/03/21	184	308	223	208	190

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); ocean = routes to Japan (\$/metric ton); n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

Market Update: U.S. origins to export position price spreads (\$/bushel)

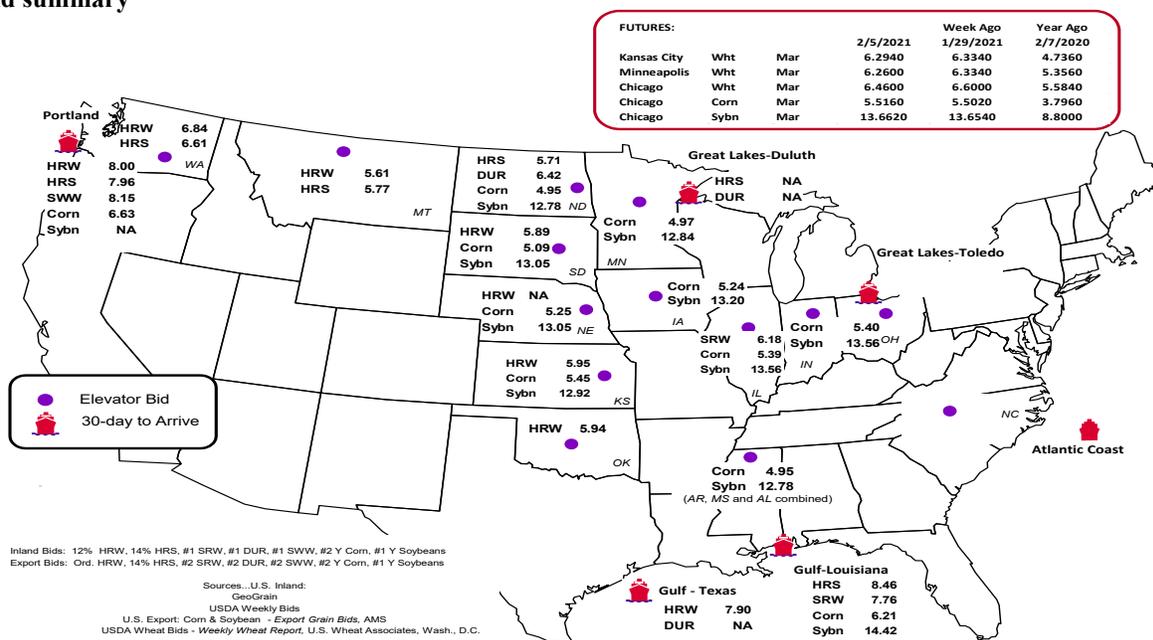
Commodity	Origin-destination	2/5/2021	1/29/2021
Corn	IL-Gulf	-0.82	-0.79
Corn	NE-Gulf	-0.96	-0.98
Soybean	IA-Gulf	-1.22	-1.23
HRW	KS-Gulf	-1.95	-2.07
HRS	ND-Portland	-2.25	-2.16

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

Source: USDA, Agricultural Marketing Service.

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			
2/03/2021 ^p	2,022	2,120	8,302	832	13,276	1/30/2021	2,255
1/27/2021 ^r	2,131	1,517	7,718	990	12,356	1/23/2021	2,457
2021 YTD ^r	10,273	10,659	37,361	4,853	63,146	2021 YTD	11,382
2020 YTD ^r	2,568	3,240	17,762	882	24,452	2020 YTD	11,149
2021 YTD as % of 2020 YTD	400	329	210	550	258	% change YTD	102
Last 4 weeks as % of 2020 ²	375	347	191	931	245	Last 4wks. % 2020	123
Last 4 weeks as % of 4-year avg. ²	320	168	134	233	161	Last 4wks. % 4 yr.	119
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	126,407
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622

¹Data is incomplete as it is voluntarily provided.

²Compared with same 4-weeks in 2020 and prior 4-year average.

³Cross-border weekly data is approximately 15 percent below the Association of American Railroads' reported weekly carloads received by Mexican railroads. to reflect switching between Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

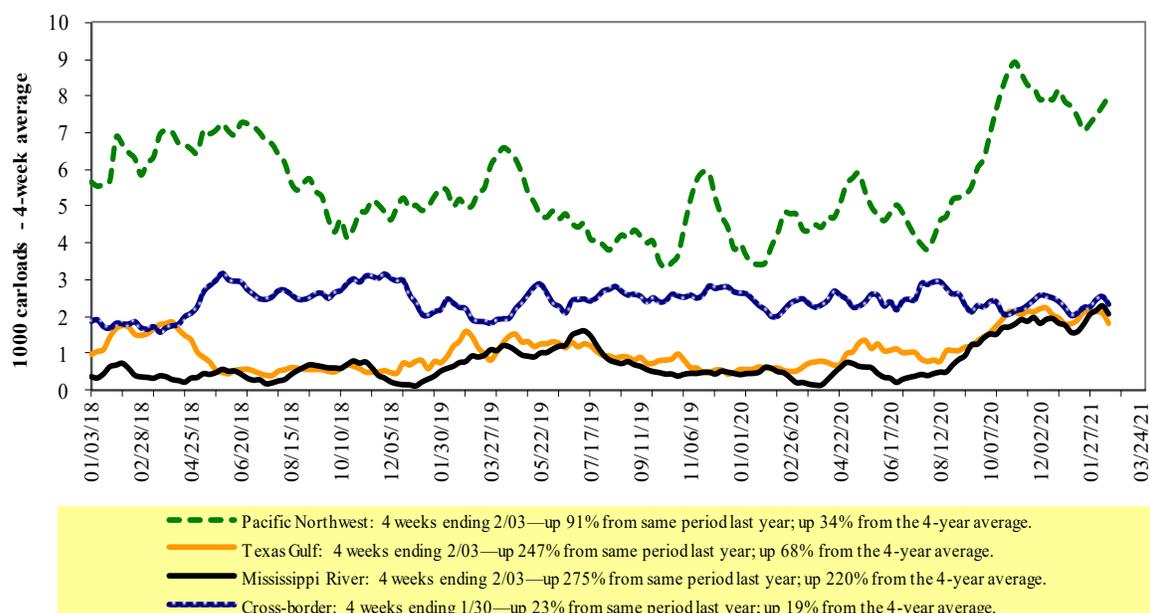
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

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: USDA, Agricultural Marketing Service.

Table 4

Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 1/30/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,084	3,159	13,756	1,133	7,350	27,482	5,872	4,869
This week last year	1,647	1,895	9,624	1,113	4,882	19,161	3,463	4,294
2021 YTD	9,135	12,482	55,441	4,494	28,488	110,040	22,173	20,260
2020 YTD	8,705	11,593	50,458	5,379	22,052	98,187	17,337	18,177
2021 YTD as % of 2020 YTD	105	108	110	84	129	112	128	111
Last 4 weeks as % of 2020*	128	139	138	106	158	140	161	135
Last 4 weeks as % of 3-yr. avg.**	124	128	125	106	143	129	153	126
Total 2020	91,659	130,943	613,630	57,782	296,701	1,190,715	239,110	261,778

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

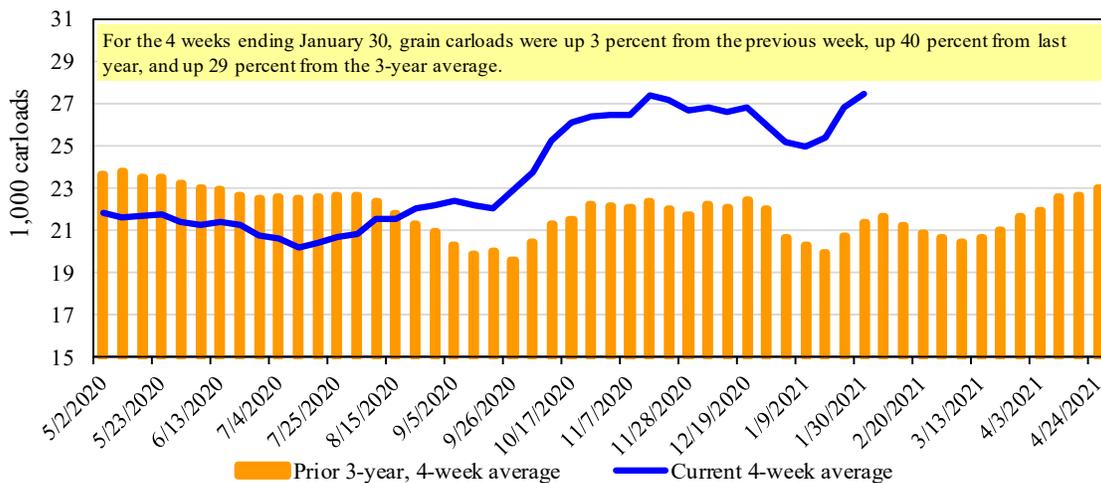
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 5

Railcar auction offerings¹ (\$/car)²

For the week ending: 2/4/2021		Delivery period							
		Feb-21	Feb-20	Mar-21	Mar-20	Apr-21	Apr-20	May-21	May-20
BNSF ³	COT grain units	no offer	0	0	0	no bids	0	no bids	no bid
	COT grain single-car	no offer	1	0	0	no bids	0	0	0
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no bid	n/a	n/a

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

²Average premium/discount to tariff, last auction. n/a = not available.

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

⁴UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

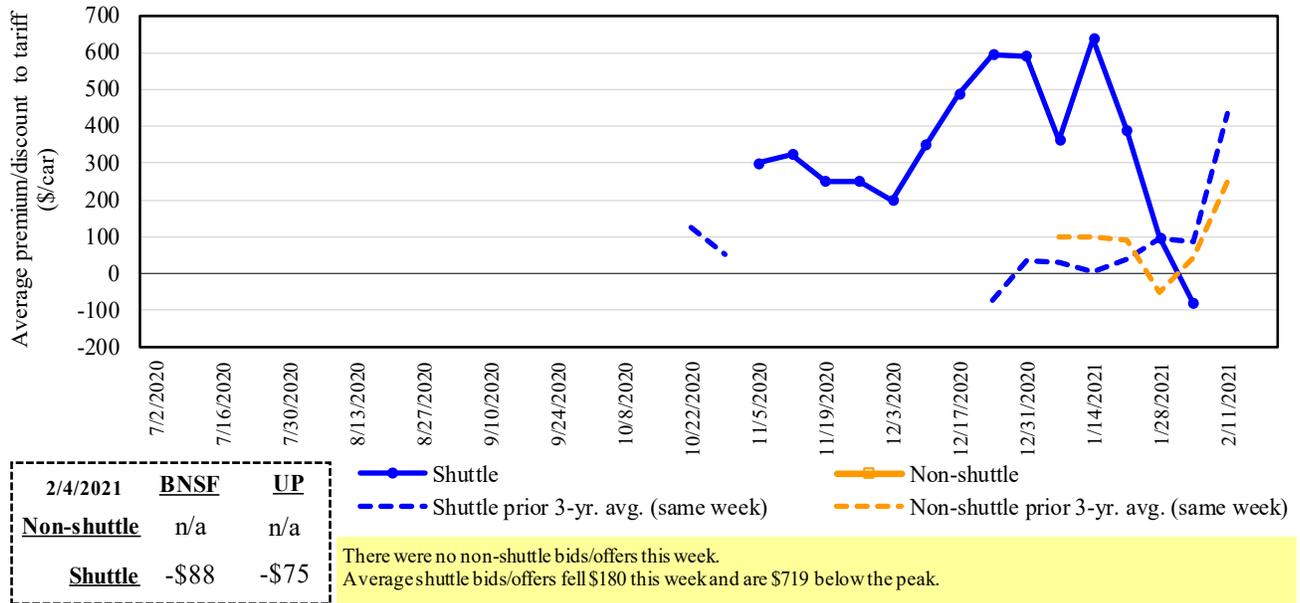
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

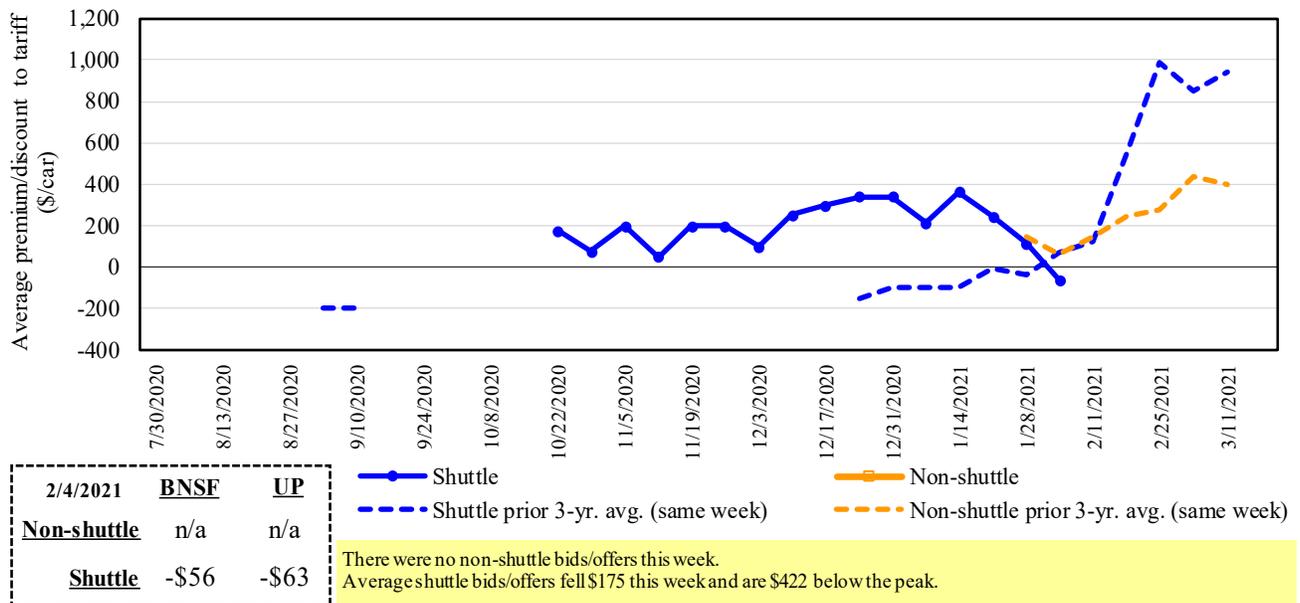
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/offers for railcars to be delivered in February 2021, secondary market



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
 Source: USDA, Agricultural Marketing Service.

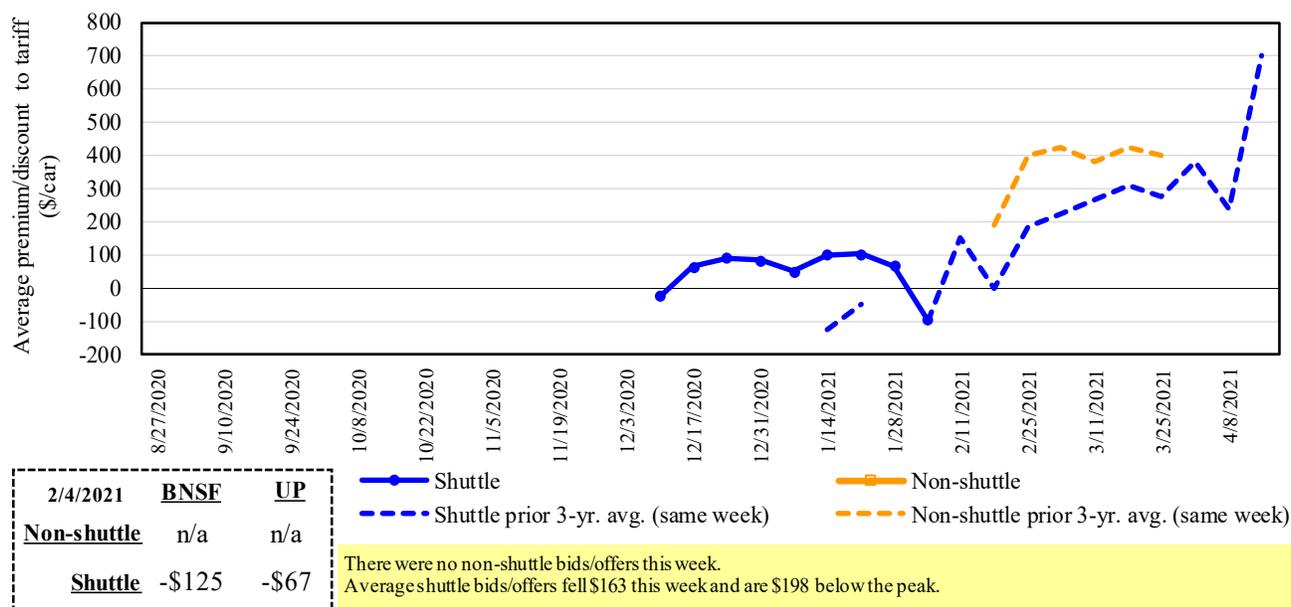
Figure 5
Bids/offers for railcars to be delivered in March 2021, secondary market



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
 Source: USDA, Agricultural Marketing Service.

Figure 6

Bids/offers for railcars to be delivered in April 2021, secondary market



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service.

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending:		Delivery period					
		Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
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 2020	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 2020	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(88)	(56)	(125)	(50)	(100)	(150)
	Change from last week	(201)	(212)	(158)	25	n/a	0
	Change from same week 2020	254	n/a	n/a	n/a	n/a	n/a
	UP-Pool	(75)	(63)	(67)	n/a	n/a	(100)
	Change from last week	(160)	(138)	(167)	n/a	n/a	(25)
	Change from same week 2020	142	38	n/a	n/a	n/a	n/a

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

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool;

BNSF = BNSF Railway; UP = Union Pacific Railroad.

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes 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. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff rail rates for unit and shuttle train shipments¹

February 2021	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	\$3,983	\$51	\$40.06	\$1.09	-1
	Grand Forks, ND	Duluth-Superior, MN	\$4,208	\$0	\$41.79	\$1.14	-3
	Wichita, KS	Los Angeles, CA	\$7,115	\$0	\$70.66	\$1.92	-2
	Wichita, KS	New Orleans, LA	\$4,525	\$89	\$45.82	\$1.25	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,851	\$0	\$68.03	\$1.85	-2
	Colby, KS	Galveston-Houston, TX	\$4,801	\$98	\$48.64	\$1.32	-2
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$136	\$52.20	\$1.42	-3
	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$101	\$39.73	\$1.01	-2
	Toledo, OH	Raleigh, NC	\$7,833	\$0	\$77.79	\$1.98	15
	Des Moines, IA	Davenport, IA	\$2,455	\$21	\$24.59	\$0.62	1
	Indianapolis, IN	Atlanta, GA	\$5,979	\$0	\$59.37	\$1.51	3
	Indianapolis, IN	Knoxville, TN	\$5,040	\$0	\$50.05	\$1.27	3
Soybeans	Des Moines, IA	Little Rock, AR	\$3,900	\$63	\$39.35	\$1.00	1
	Des Moines, IA	Los Angeles, CA	\$5,780	\$182	\$59.21	\$1.50	-1
	Minneapolis, MN	New Orleans, LA	\$5,246	\$74	\$52.83	\$1.44	39
	Toledo, OH	Huntsville, AL	\$6,595	\$0	\$65.49	\$1.78	17
	Indianapolis, IN	Raleigh, NC	\$7,125	\$0	\$70.75	\$1.93	3
	Indianapolis, IN	Huntsville, AL	\$5,247	\$0	\$52.11	\$1.42	3
	Champaign-Urbana, IL	New Orleans, LA	\$4,645	\$101	\$47.13	\$1.28	-2
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,018	\$0	\$39.90	\$1.09	-3
	Wichita, KS	Galveston-Houston, TX	\$4,236	\$0	\$42.07	\$1.14	-3
	Chicago, IL	Albany, NY	\$6,376	\$0	\$63.32	\$1.72	-10
	Grand Forks, ND	Portland, OR	\$5,676	\$0	\$56.37	\$1.53	-2
	Grand Forks, ND	Galveston-Houston, TX	\$5,996	\$0	\$59.54	\$1.62	-2
	Colby, KS	Portland, OR	\$6,012	\$160	\$61.29	\$1.67	-3
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	0
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,820	\$101	\$38.93	\$0.99	-3
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
	Des Moines, IA	Amarillo, TX	\$4,320	\$79	\$43.68	\$1.11	0
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,100	\$0	\$50.65	\$1.29	2
	Sioux Falls, SD	Tacoma, WA	\$5,850	\$0	\$58.09	\$1.58	0
	Minneapolis, MN	Portland, OR	\$5,900	\$0	\$58.59	\$1.59	0
	Fargo, ND	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	0
	Council Bluffs, IA	New Orleans, LA	\$4,875	\$116	\$49.56	\$1.35	-2
	Toledo, OH	Huntsville, AL	\$4,945	\$0	\$49.11	\$1.34	3
	Grand Island, NE	Portland, OR	\$5,260	\$164	\$53.86	\$1.47	-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 pounds per bushel (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 (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

Table 8

Tariff rail rates for U.S. bulk grain shipments to Mexico

Date: February 2021			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,384	\$0	\$75.45	\$2.05	-2
	OK	Cuautitlan, EM	\$6,713	\$70	\$69.30	\$1.88	-2
	KS	Guadalajara, JA	\$7,471	\$519	\$81.64	\$2.22	-2
	TX	Salinas Victoria, NL	\$4,347	\$43	\$44.85	\$1.22	-1
Corn	IA	Guadalajara, JA	\$8,902	\$421	\$95.26	\$2.42	-1
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	0
	NE	Queretaro, QA	\$8,300	\$145	\$86.29	\$2.19	-1
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,665	\$142	\$79.76	\$2.02	-1
	SD	Torreon, CU	\$7,690	\$0	\$78.57	\$1.99	0
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$397	\$91.38	\$2.48	-1
	NE	Guadalajara, JA	\$9,157	\$408	\$97.73	\$2.66	-1
	IA	El Castillo, JA	\$9,410	\$0	\$96.15	\$2.61	-1
	KS	Torreon, CU	\$8,014	\$272	\$84.66	\$2.30	-1
Sorghum	NE	Celaya, GJ	\$7,772	\$364	\$83.14	\$2.11	-1
	KS	Queretaro, QA	\$8,108	\$87	\$83.73	\$2.12	-1
	NE	Salinas Victoria, NL	\$6,713	\$70	\$69.30	\$1.76	-1
	NE	Torreon, CU	\$7,092	\$242	\$74.94	\$1.90	-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.

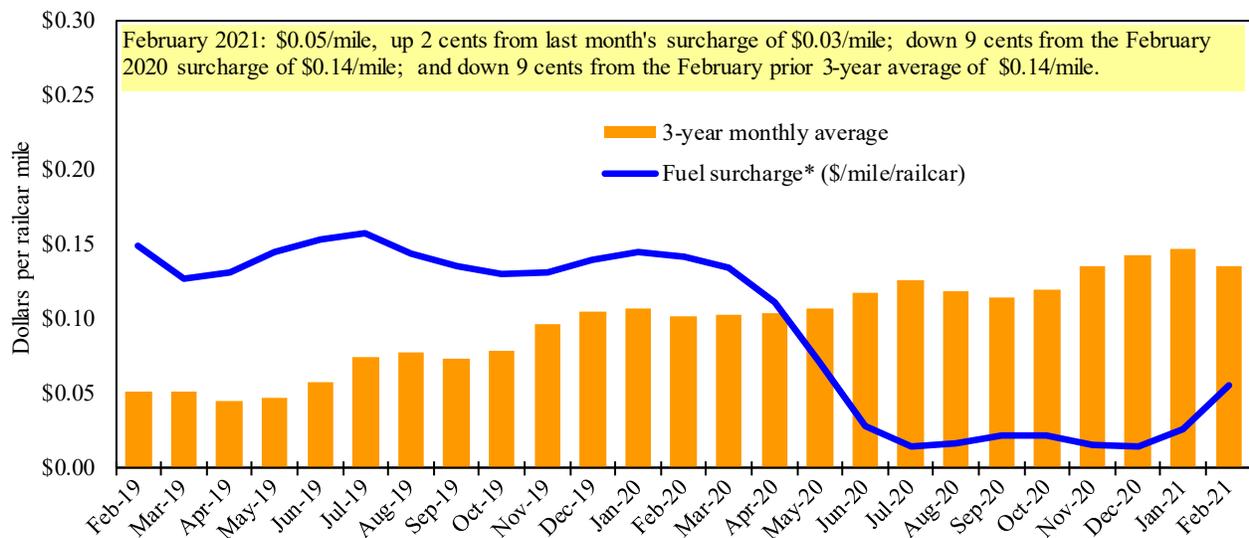
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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; Y/Y = year over year.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

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.

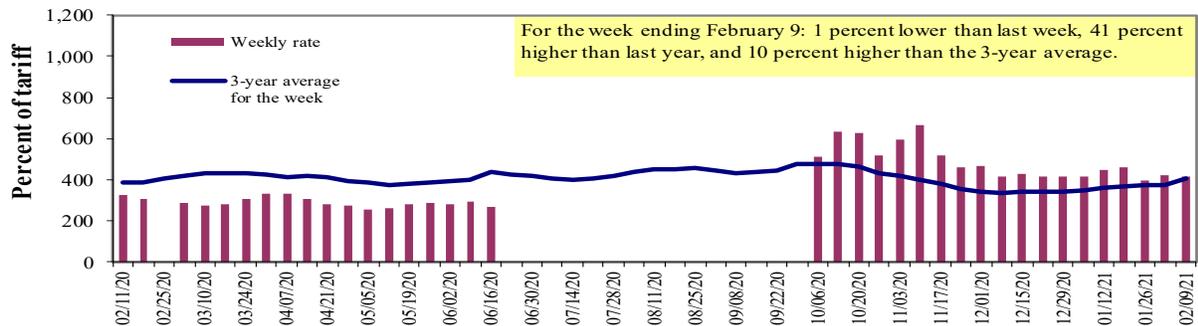
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Barge Transportation

Figure 8

Illinois River barge freight rate^{1,2,3}



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

³No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.

Source: USDA, Agricultural Marketing Service.

Table 9

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	2/9/2021	-	-	416	279	321	321	248
	2/2/2021	-	-	420	295	323	323	260
\$/ton	2/9/2021	-	-	19.30	11.13	15.05	12.97	7.79
	2/2/2021	-	-	19.49	11.77	15.15	13.05	8.16
Current week % change from the same week:								
	Last year	-	-	41	45	53	53	35
	3-year avg. ²	-	-	10	-3	0	0	-3
Rate¹	March	-	-	391	279	303	303	246
	May	494	396	378	269	291	291	240

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

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 are included in tables on this page. The 1976 benchmark rates per ton are provided in map.

Map Credit: USDA, Agricultural Marketing Service

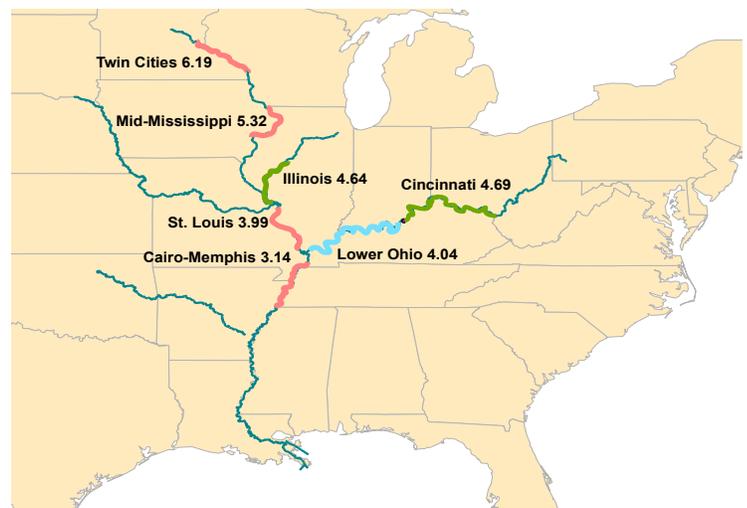
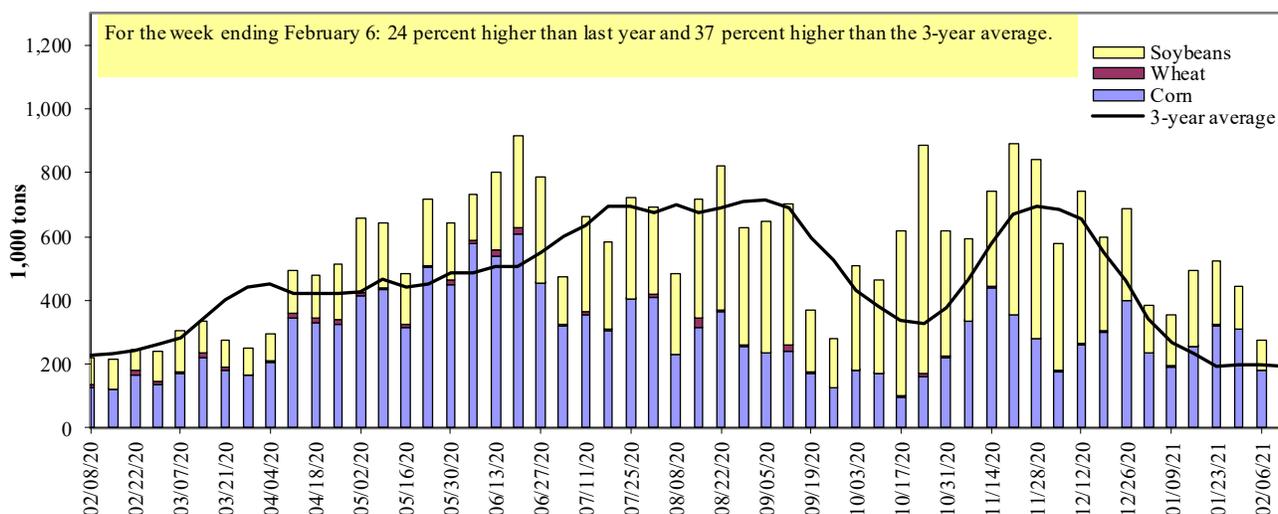


Figure 10

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 02/06/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	208	0	94	0	302
Granite City, IL (L27)	182	0	91	0	272
Illinois River (La Grange)	213	0	100	0	314
Ohio River (Olmsted)	332	8	129	25	493
Arkansas River (L1)	0	11	17	0	28
Weekly total - 2021	513	19	237	25	793
Weekly total - 2020	205	30	312	0	547
2021 YTD ¹	2,534	70	1,808	85	4,497
2020 YTD ¹	1,046	111	1,479	6	2,641
2021 as % of 2020 YTD	242	63	122	1,522	170
Last 4 weeks as % of 2020 ²	240	79	143	1,491	188
Total 2020	18,942	1,765	19,205	237	40,149

¹ Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

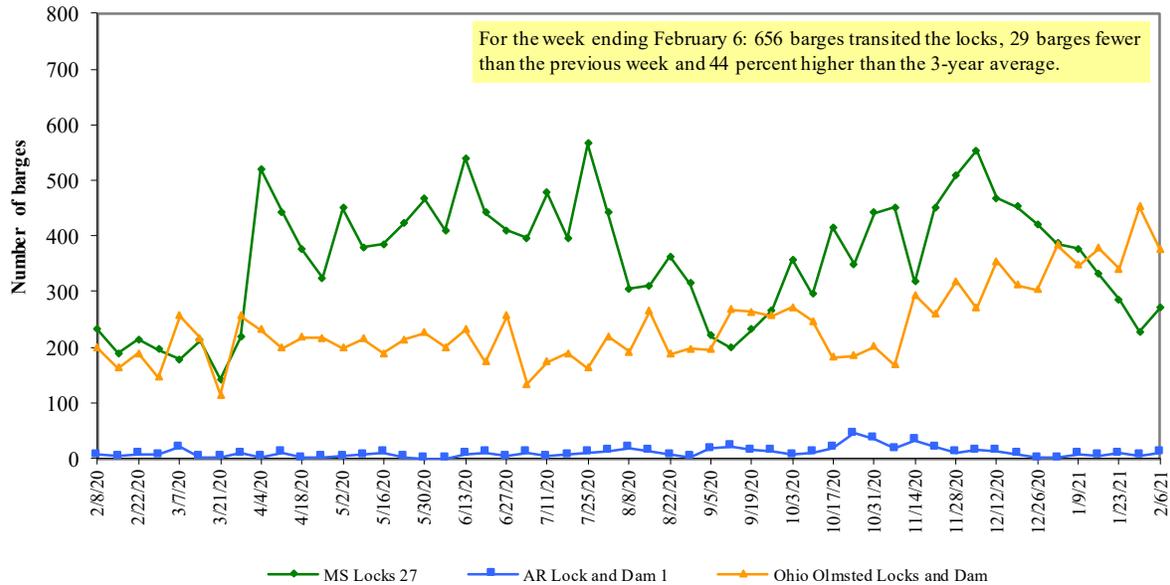
² As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

Source: U.S. Army Corps of Engineers.

Figure 11

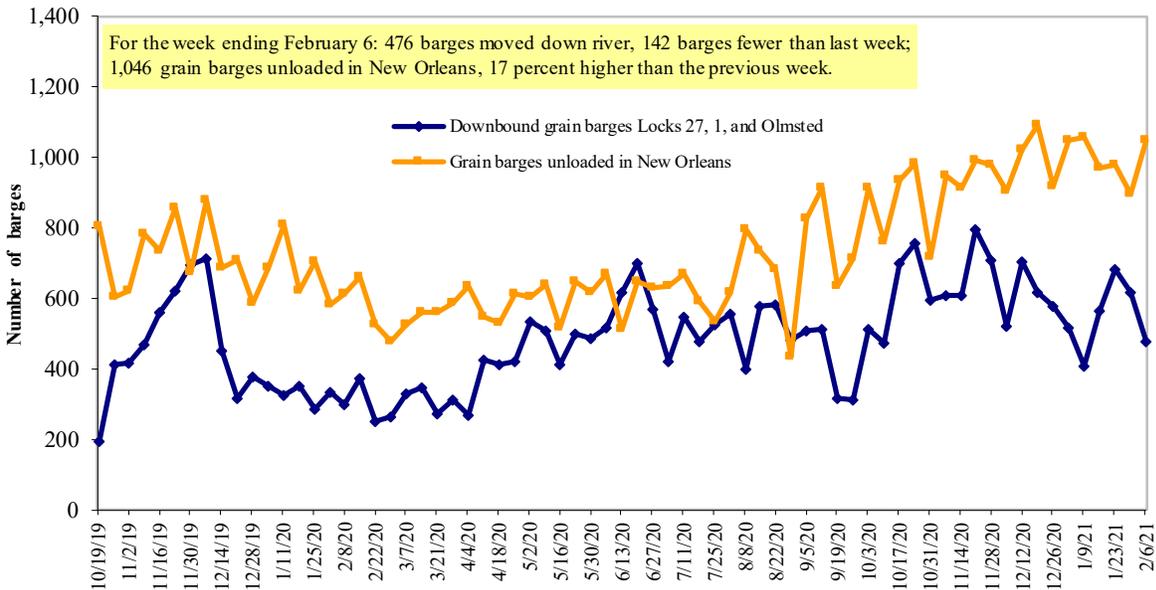
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

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 2/8/2021 (U.S. \$/gallon)

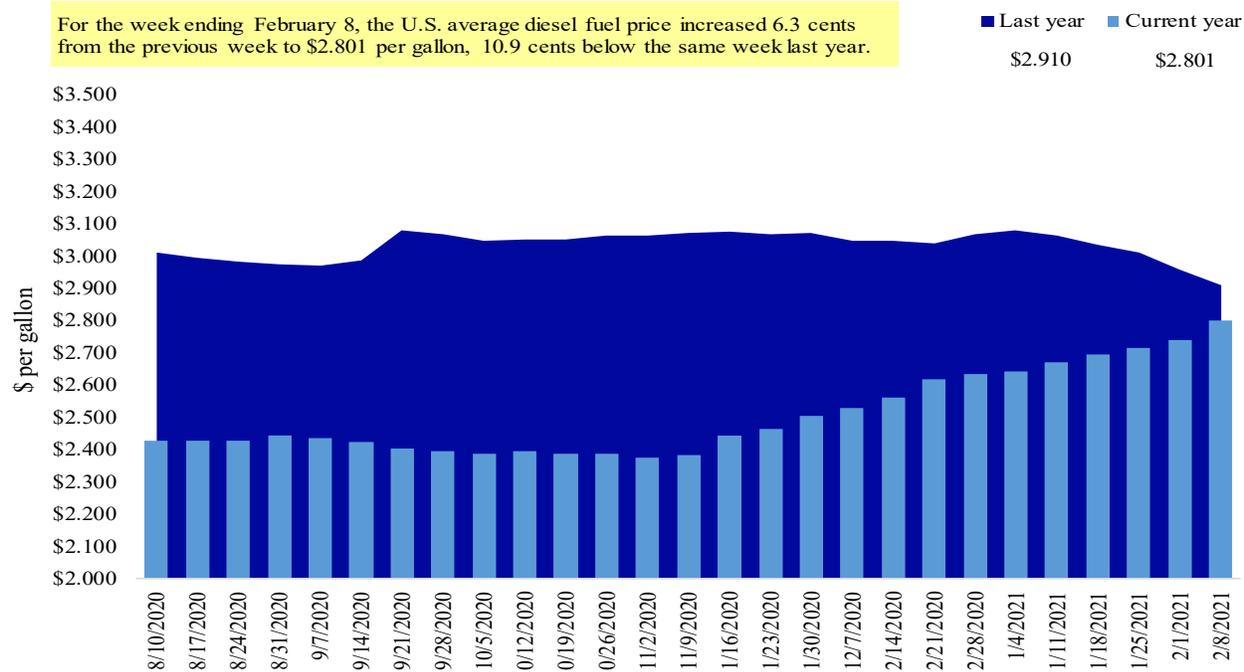
Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.845	0.054	-0.117
	New England	2.840	0.044	-0.235
	Central Atlantic	3.005	0.041	-0.141
	Lower Atlantic	2.740	0.065	-0.076
II	Midwest	2.748	0.072	-0.028
III	Gulf Coast	2.566	0.066	-0.109
IV	Rocky Mountain	2.699	0.058	-0.196
	West Coast	3.258	0.059	-0.223
V	West Coast less California	2.897	0.056	-0.201
	California	3.558	0.061	-0.226
Total	United States	2.801	0.063	-0.109

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

Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

Grain Exports

Table 12

U.S. export balances and cumulative exports (1,000 metric tons)

For the week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export balances¹									
1/28/2021	1,358	445	2,019	2,415	167	6,405	36,090	11,132	53,626
This week year ago	1,814	455	1,559	1,139	190	5,157	11,683	5,471	22,312
Cumulative exports-marketing year²									
2020/21 YTD	6,187	1,208	4,639	3,485	491	16,009	20,017	47,526	83,551
2019/20 YTD	6,061	1,736	4,552	3,136	624	16,108	11,107	26,770	53,986
YTD 2020/21 as % of 2019/20	102	70	102	111	79	99	180	178	155
Last 4 wks. as % of same period 2019/20*	77	102	123	213	80	123	265	237	225
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327

¹ Current unshipped (outstanding) export sales to date.

² Shipped export sales to date; 2020/21 marketing year now in effect for wheat, corn, and soybeans.

Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW = soft red winter; HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 13

Top 5 importers¹ of U.S. corn

For the week ending 1/28/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	- 1,000 mt -			
Mexico	11,084	9,961	11	14,869
Japan	7,546	3,923	92	11,221
Columbia	2,480	2,188	13	4,830
Korea	1,271	79	1,507	4,011
China	17,705	61	28,877	909
Top 5 importers	40,086	16,212	147	35,840
Total U.S. corn export sales	56,107	22,791	146	49,983
% of projected exports	85%	50%		
Change from prior week ²	7,437	1,248		
Top 5 importers' share of U.S. corn export sales	71%	71%		72%
USDA forecast February 2021	66,158	45,242	46	
Corn use for ethanol USDA forecast, February 2021	125,730	123,241	2	

¹ Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.

² Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. 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 (carry over plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers¹ of U.S. soybeans

For the week ending 1/28/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	1,000 mt -			- 1,000 mt -
China	35,333	12,007	194	19,106
Mexico	3,962	3,222	23	4,591
Egypt	2,150	1,839	17	2,980
Indonesia	1,379	1,056	31	2,360
Japan	1,450	1,460	(1)	2,288
Top 5 importers	44,274	19,583	126	31,324
Total U.S. soybean export sales	58,658	32,242	82	49,352
% of projected exports	96%	70%		
change from prior week ²	824	638		
Top 5 importers' share of U.S. soybean export sales	75%	61%		63%
USDA forecast, February 2021	61,308	45,831	134	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.

³FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 15

Top 10 importers¹ of all U.S. wheat

For the week ending 1/28/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
	1,000 mt -			- 1,000 mt -
Mexico	2,948	3,010	(2)	3,213
Philippines	2,771	2,697	3	2,888
Japan	2,078	2,127	(2)	2,655
Nigeria	1,170	1,166	0	1,433
Korea	1,481	1,097	35	1,372
Indonesia	987	766	29	1,195
Taiwan	942	1,057	(11)	1,175
Thailand	704	757	(7)	727
Italy	545	738	(26)	622
Colombia	342	576	(41)	618
Top 10 importers	13,967	13,991	(0)	15,897
Total U.S. wheat export sales	22,414	21,266	5	23,821
% of projected exports	84%	81%		
change from prior week ²	643	339		
Top 10 importers' share of U.S. wheat export sales	62%	66%		67%
USDA forecast, February 2021	26,839	26,294	2	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2019/20; Marketing year (MY) = Jun 1 - May 31.

²Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.

³FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.

Note: A red number in parentheses indicates a negative number.

Source: USDA, Foreign Agricultural Service.

Table 16

Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 02/04/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of:		2020 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	320	330	97	1,343	1,689	80	94	104	15,966
Corn	298	242	123	1,388	67	n/a	n/a	154	9,969
Soybeans	551	502	110	2,548	1,396	183	203	172	14,028
Total	1,169	1,074	109	5,280	3,152	167	186	144	39,963
Mississippi Gulf									
Wheat	9	65	13	201	402	50	80	54	3,422
Corn	1,104	659	168	4,056	2,493	163	183	167	28,781
Soybeans	1,028	1,105	93	6,060	4,376	138	178	168	38,013
Total	2,141	1,829	117	10,317	7,272	142	175	160	70,215
Texas Gulf									
Wheat	56	0	n/a	291	464	63	118	71	4,248
Corn	9	31	29	51	74	68	96	103	723
Soybeans	56	60	94	546	0	n/a	n/a	n/a	2,098
Total	121	91	133	887	538	165	285	190	7,068
Interior									
Wheat	80	37	214	245	223	110	139	163	2,263
Corn	138	164	84	759	768	99	123	126	8,683
Soybeans	176	163	108	842	853	99	111	129	7,274
Total	394	365	108	1,846	1,844	100	120	131	18,220
Great Lakes									
Wheat	1	4	18	16	1	n/a	n/a	168	891
Corn	0	0	n/a	0	0	n/a	n/a	n/a	111
Soybeans	0	0	n/a	0	0	n/a	n/a	0	1,111
Total	1	4	18	16	1	n/a	n/a	132	2,113
Atlantic									
Wheat	0	0	n/a	0	0	n/a	n/a	n/a	65
Corn	0	0	n/a	0	0	n/a	n/a	0	33
Soybeans	84	123	68	466	153	305	436	293	1,870
Total	84	123	68	466	153	305	436	283	1,968
U.S. total from ports*									
Wheat	464	436	106	2,097	2,779	75	100	94	26,854
Corn	1,549	1,096	141	6,254	3,402	184	207	156	48,301
Soybeans	1,895	1,952	97	10,462	6,779	154	189	177	64,394
Total	3,908	3,485	112	18,813	12,960	145	175	154	139,548

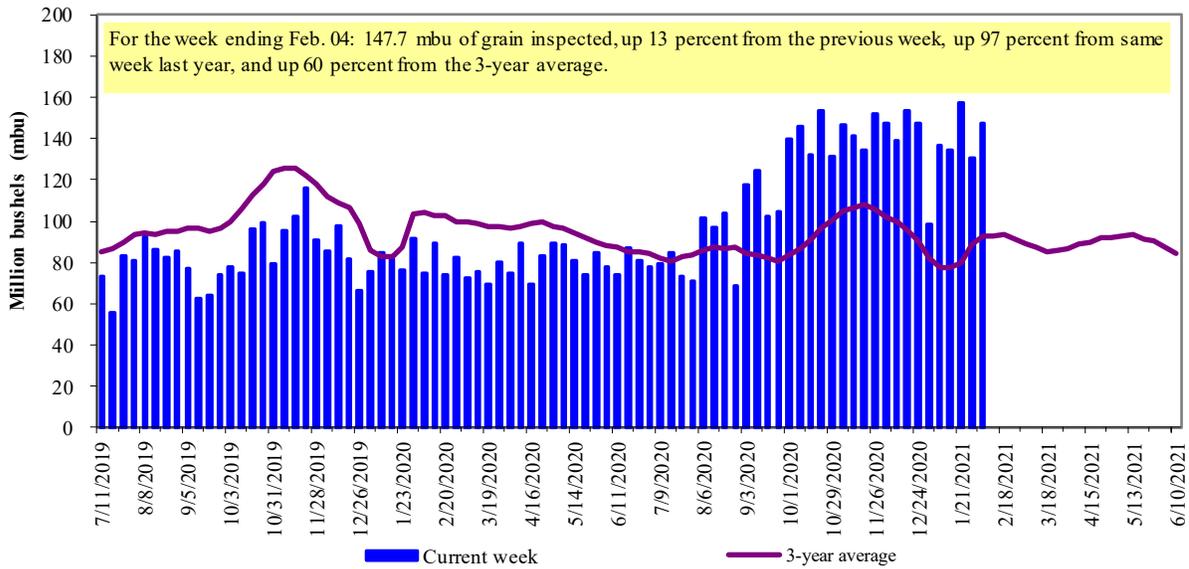
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

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 2019.

Figure 14

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

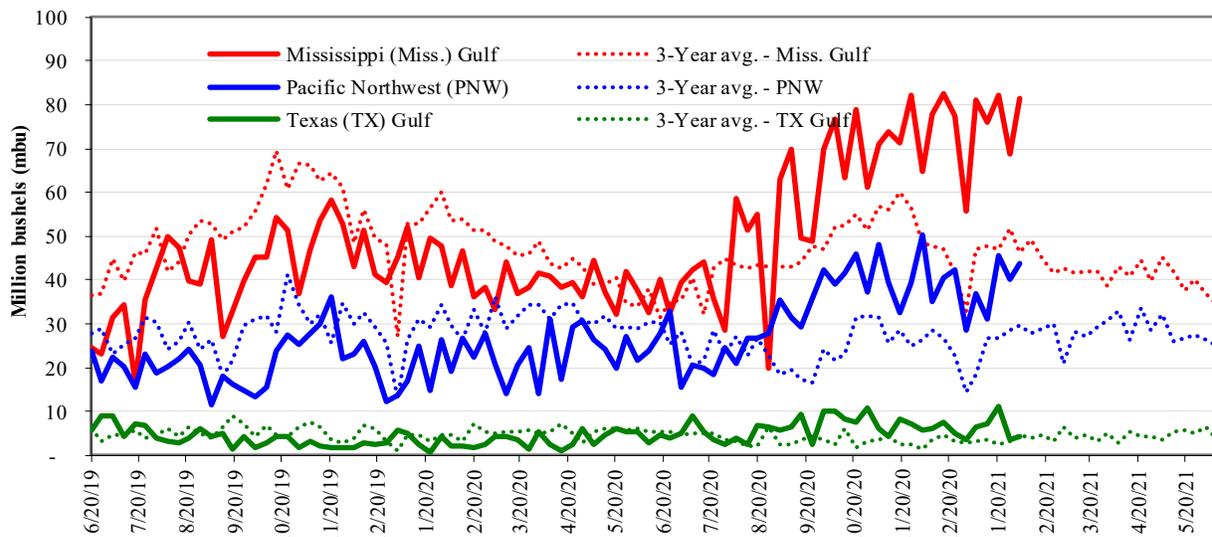


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 02/04/21 inspections (mbu):		Percent change from:			
MS Gulf:	81.6	Last wk:	MS Gulf up 18	TX Gulf up 30	U.S. Gulf up 19
PNW:	43.7	Last Year (same wk):	up 111	up 120	up 111
TX Gulf:	4.5	3-yr avg.(4-wk. mov. Avg):	up 69	up 27	up 66
					up 56

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

Weekly port region grain ocean vessel activity (number of vessels)

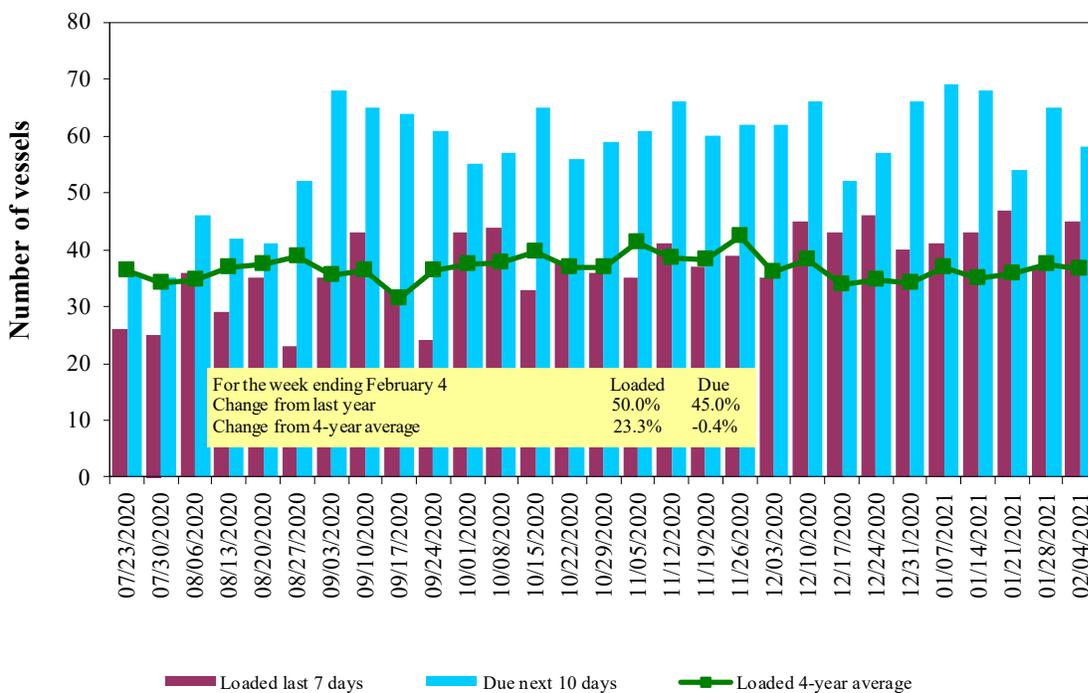
Date	Gulf			Pacific Northwest
	In port	Loaded	Due next	In port
		7-days	10-days	
2/4/2021	42	45	58	21
1/28/2021	37	37	65	18
2020 range	(22...60)	(23...46)	(34...68)	(7...24)
2020 average	37	33	49	15

Note: n/a = not available due to holiday.

Source: USDA, Agricultural Marketing Service.

Figure 16

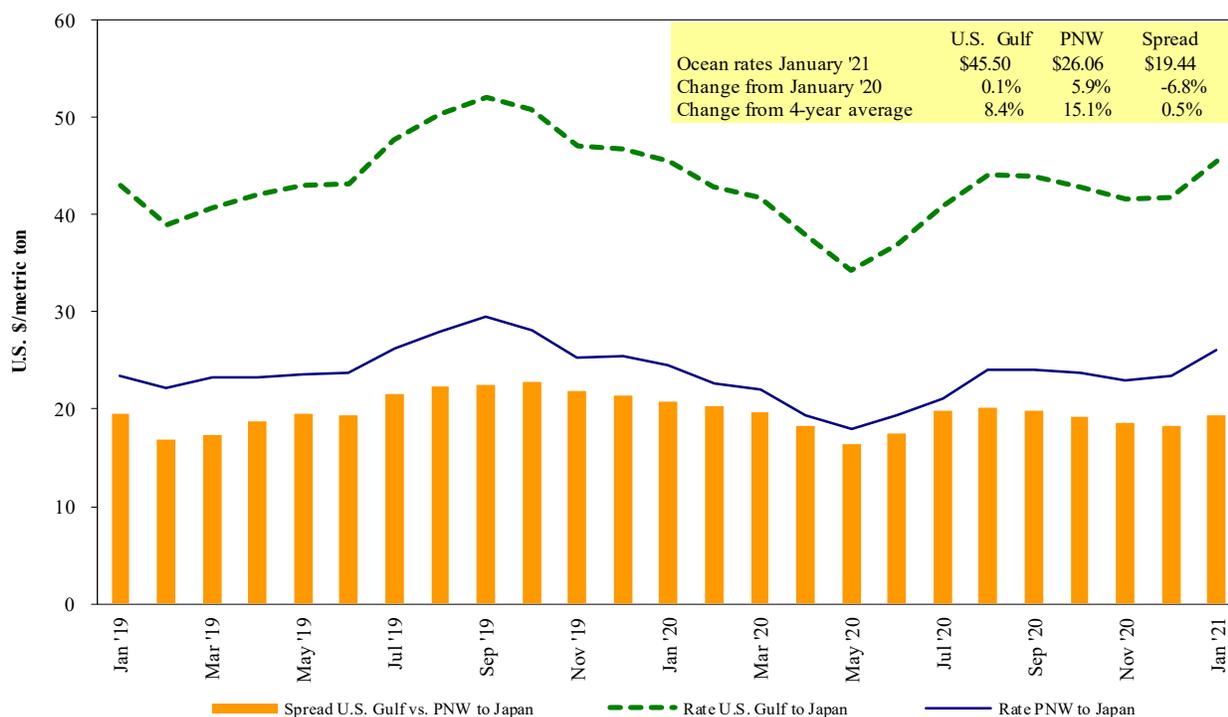
U.S. Gulf¹ vessel loading activity



¹U.S. Gulf includes Mississippi, Texas, and East Gulf.
Source: USDA, Agricultural Marketing Service.

Figure 17

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting

Table 18

Ocean freight rates for selected shipments, week ending 02/06/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Grain	May 25/June 25	50,000	46.85 op 47.85
U.S. Gulf	Japan	Heavy grain	Apr 15/May 15	50,000	47.00
U.S. Gulf	Japan	Heavy grain	Apr 1/30	48,000	46.75
U.S. Gulf	China	Heavy grain	Dec 6/11	66,000	39.25
U.S. Gulf	China	Heavy grain	Nov 20/30	65,000	37.25
U.S. Gulf	China	Heavy grain	Oct 16/25	66,000	41.75
U.S. Gulf	Djibouti	Wheat	Oct 16/26	12,180	94.48*
U.S. Gulf	Vietnam	Corn	Feb 5/15	70,000	47.25
PNW	Taiwan	Wheat	Feb 18/Mar 4	40,925	35.24*
PNW	Taiwan	Corn	Feb 20/Mar 15	65,000	24.90
PNW	Indonesia	Soybean Meal	Nov 10/20	8,600	37.86*
Ukraine	China	Corn	Feb 10/17	60,000	36.40 op 38.90

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

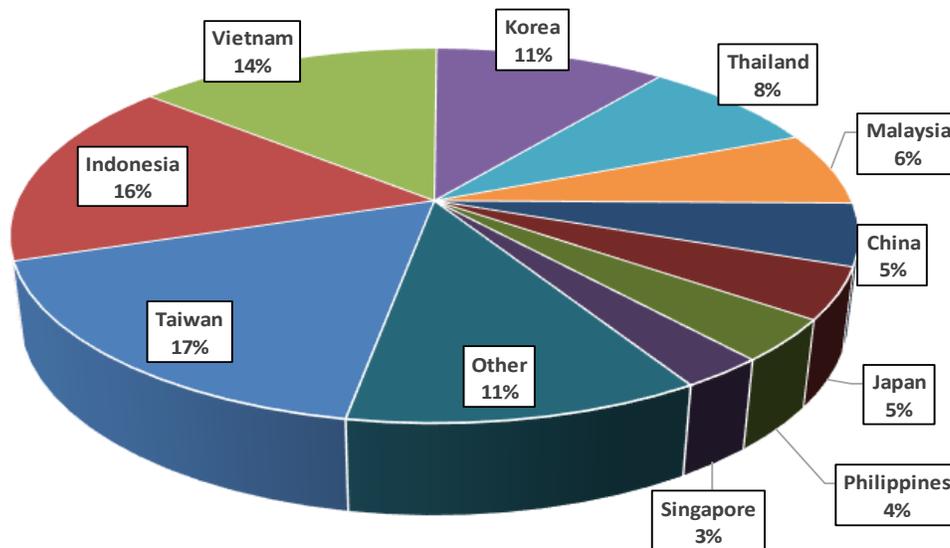
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

op = option.

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

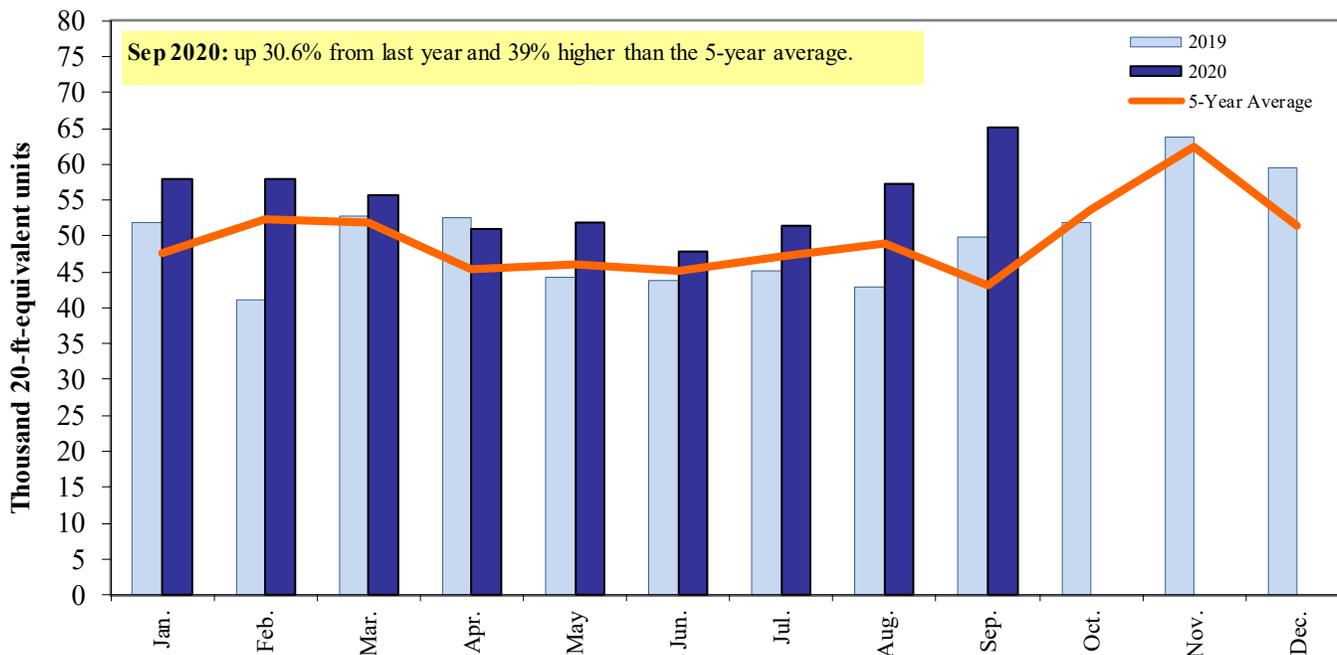
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, 120810, and 120190.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Figure 19
Monthly shipments of containerized grain to Asia



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120190, 120810, 230210, 230310, 230330, and 230990.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

Contacts and Links

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Grain Transportation Indicators

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