



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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March 2, 2023

WEEKLY HIGHLIGHTS

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USDA's Agricultural Outlook Forum

Last week, USDA held its 99th annual Agricultural Outlook Forum (Forum), themed "U.S. Agriculture: Seeds of Growth Through Innovation." This year's Forum featured a keynote address by the USDA Secretary, a presentation on the 2023 agricultural economy by USDA's Chief Economist, and 30 breakout sessions—including one on "Transportation and Global Supply Chain Disruptions." All sessions are publicly available via online recordings, at no cost, by registering on [the Forum's USDA webpage](#). At the Forum, USDA also released its [first projections](#) for the upcoming marketing year (MY) 2023/24. (The next update will occur with USDA's May *World Agricultural Supply and Demand Estimates* report.) In MY 2023/24, USDA expects a near-record production of corn, soybeans, and wheat (21.5 billion bushels)—up 9 percent from MY 2022/23. Additionally, exports and domestic use are projected to rise 8 percent and 3 percent, respectively, from the previous year, boosting the demand for grain transportation.

Columbia Rail To Manage Short Line for Port of Benton (WA)

The Port of Benton in Richland, WA, recently hired Columbia Rail to manage its 16-mile short line railroad—a first step toward reversing decades of deterioration. [Per the 2-year agreement](#), Columbia Rail will pay the port \$13,000 a month to use the line and a locomotive repair facility. However, the port will return the money to Columbia by covering operation and maintenance costs. The port hopes, immediately, to raise train speeds from 5 miles per hour (mph) to 10 mph, and eventually, to restore them to 25 mph. Central Washington Corn Processors ([CWCP](#)) is a 2.1-million-bushel grain transload facility located on the short line railroad that supports livestock operations throughout the region. Via the port-owned short line railroad, CWCP is connected to both Union Pacific and BNSF.

Cargill Closes Grain Elevator on Lake Michigan

Cargill, Inc., has permanently closed its grain elevator at the Ports of Indiana–Burns Harbor. On June 1, the company will relinquish its control of the facility to the Ports of Indiana, and port officials are currently seeking a new operator. Cargill's export facility is made up of 14 silos, and it has a [7.8-million-bushel capacity](#) for soybeans, corn, and wheat. According to [Reuters](#), Cargill said it will not renew the facility's lease because "of several contributing factors, which include the current and projected market environment," and the company is working individually with customers to ensure their continued access to markets for their grain. According to the [Ports of Indiana](#), 11 percent of the annual cargo at the Burns Harbor location is made up of agricultural products—most of the cargo is steel. The port is multimodal—conveying cargo through truck, rail, barge, and ships.

Snapshots by Sector

Export Sales

For the week ending February 16, [unshipped balances](#) of wheat, corn, and soybeans for marketing year (MY) 2022/23 totaled 25.56 million metric tons (mmt), down 31 percent from the same time last year and down 4 percent from last week. Net [corn export sales](#) for MY 2022/23 were 0.823 mmt, down 20 percent from last week. Net [soybean export sales](#) were 0.545 mmt, up 19 percent from last week. Net weekly [wheat export sales](#) were 0.339 mmt, up 61 percent from last week.

Rail

U.S. Class I railroads originated 21,864 [grain carloads](#) during the week ending February 18. This was a 3-percent increase from the previous week, 12 percent fewer than last year, and 6 percent more than the 3-year average.

Average March [shuttle secondary railcar bids/offers](#) (per car) were \$163 below tariff for the week ending February 23. This was \$41 more than last week and \$313 lower than this week last year.

Barge

For the week ending February 25, [barged grain movements](#) totaled 412,150 tons. This was 42 percent lower than the previous week and 23 percent lower than the same period last year.

For the week ending February 25, 258 grain barges [moved down river](#)—180 fewer than last week. There were 476 grain barges [unloaded](#) in the New Orleans region, 37 percent fewer than last week.

Ocean

For the week ending February 23, 25 [oceangoing grain vessels](#) were loaded in the Gulf—4 percent fewer than the same period last year. Within the next 10 days (starting February 24), 44 vessels were expected to be loaded—2 percent more than the same period last year.

As of February 23, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$48.50. This was 2 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$26.50 per mt, 2 percent more than the previous week.

Fuel

For the week ending February 27, the U.S. average [diesel fuel price](#) decreased 8.2 cents from the previous week to \$4.294 per gallon, 19.0 cents above the same week last year.

Feature Article/Calendar

Update on Grain Storage Capacity and Grain Stocks

Grain storage provides a key mediating function between agricultural production and transportation demand. Storage can help mitigate gaps between the supply of grain, on one side, and demand for grain and transportation, on the other. In this way, grain storage lessens the impact on supply chains from drought, floods, labor disputes, etc. In a typical year, stocks in storage are replenished with grain during the harvests of summer (wheat, barley, and oats) and fall (corn, soybeans, and sorghum). For the remainder of the year, the sale of grain from storage generates transportation demand.

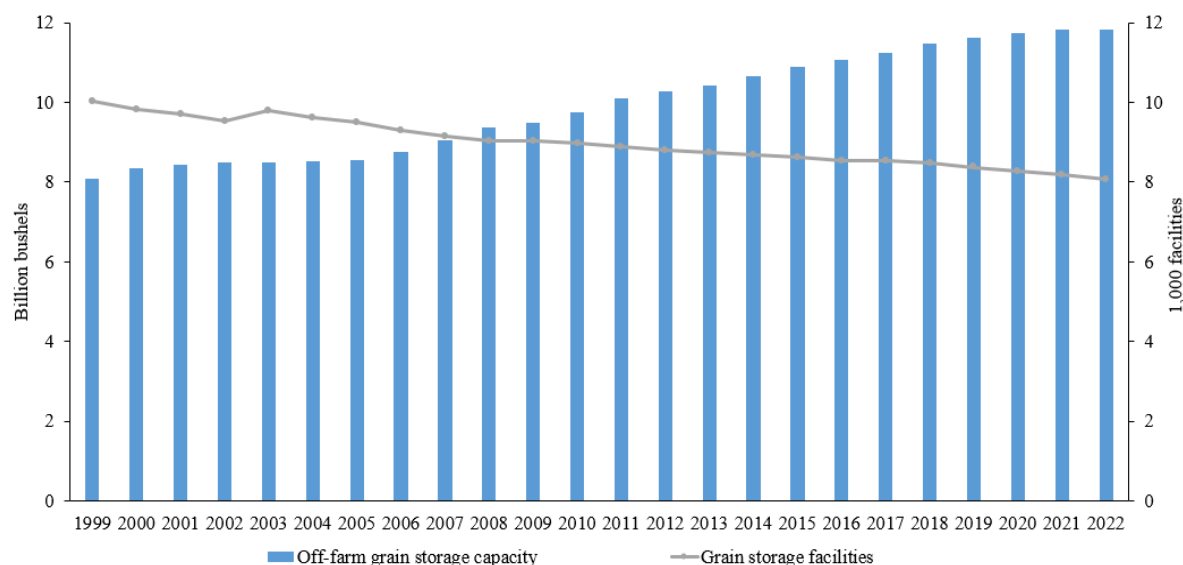
This article discusses how grain transportation has responded to the long-term trends of off-farm storage consolidation and rising storage capacity. Also considered are the latest numbers on grain storage capacity and grain stocks and their significance for transportation. USDA's National Agricultural Statistics Service (NASS) provides quarterly data on the inventory of grain in storage (i.e., stocks).¹ The most recent quarter, published January 12, 2023, includes yearly estimates for both on- and off-farm grain storage capacity and the amount of grain held in storage as of December 1, 2022.²

Growth in Grain Storage Capacity Slows...

According to NASS's January [Grain Stocks](#) report, total (both on- and off-farm) U.S. grain storage capacity as of December 1, 2022, was estimated at 25.40 billion bushels (bbu), up 0.1 percent from December 1, 2021 (year to year) and up 1 percent from the 5-year average. The year-to-year increase was the lowest since 2003.

On-farm storage capacity. U.S. on-farm grain storage capacity rose slightly from 13.55 bbu to 13.58 bbu from December 1, 2021, to December 1, 2022. Fifty-three percent of the Nation's total on-farm grain storage capacity is concentrated in Iowa (2.05 bbu), Minnesota (1.55 bbu), Illinois (1.50 bbu), Nebraska (1.20 bbu), and North Dakota (0.93 bbu).

Figure 1. Off-farm grain storage capacity



Source: USDA, National Agricultural Statistics Service.

Off-farm storage capacity and consolidation. On December 1, 2022, the number of U.S. off-farm/commercial grain storage facilities fell to 8,068—down from 8,197 on December 1, 2021 and down from over 10,000 in 1999 (fig. 1). At the same time, off-farm grain storage capacity (measured in bushels) has generally increased. Despite staying flat (at 11.82 bbu) from December 1, 2021, to December 1, 2022—off-farm grain storage capacity rose by an average of about 2 percent per year, over the previous decade. Currently, 52 percent of off-farm grain storage capacity resides in five States: Illinois (1.65 bbu), Iowa (1.52 bbu), Kansas (1.20 bbu), Nebraska (0.99 bbu), and Minnesota (0.82 bbu). As a combined effect of industry consolidation and growth in overall capacity, the average commercial grain storage facility grew from holding nearly 1 million bushels (mbu) in 2007 to just under 1.5 mbu in 2022.

¹ NASS reports grain stocks for March 1, June 1, September 1, and December 1.

² On-farm storage includes all bins, cribs, sheds, and other structures located on farms. Off-farm storage includes elevators, warehouses, terminals, merchant mills, oilseed crushers, and other types of commercial storage.

Impact of rail technology. Over the past few decades, one factor driving the consolidation of off-farm grain storage facilities has been the rise of unit- and shuttle-trains. These train-types consist of large groups of cars, typically 75 or more, of a single commodity going from one origin to one destination. Unit- and shuttle-trains allow the railroads to improve efficiency, lower costs, and pass on a portion of the savings to shippers and farmers. Loading shuttle-train movements requires more grain-holding capacity than traditional grain elevators, and many local grain elevators without shuttle-loading capacity have gone out of business. When local elevators close, producers using these elevators must adjust by shipping their commodity farther away (via truck). Besides increasing truck transportation costs for these producers, the increased reliance on trucks can lead to more road wear.³

...While Grain Supplies and Quarterly Disappearance Decreases

U.S. fall grain supplies have been low for the last several years. According to NASS's latest *Grain Stocks* report, U.S. grain stocks were 3.7 bbu on September 1, 2022—20 percent below the 5-year average. From September 1 to December 1, 2022, producers harvested 18.2 bbu of new crop corn, soybeans, and grain sorghum—3 percent below the 5-year average. Combined, fall grain supplies (September 1, 2022, grain stocks plus post-September 1 production) were 21.9 bbu—6 percent below the 5-year average. Coupled with the more long-term trend of rising storage capacity (as noted previously), these reduced supplies suggest storage was somewhat more abundant in 2022's harvest season than in the recent past. By facilitating an alternative to immediately shipping grain, the increased storage reduced harvest-time pressure on transportation and mitigated rail and barge disruptions.

Grain stocks were only 15.4 bbu on December 1—their lowest since 2013. At the same time, grain disappearance during this period (September 1 to December 1) was 6.5 bbu—3 percent lower than the 5-year average. Disappearance measures the amount of grain *used* (e.g., for export, feed, industrial use, food, etc.) and thus represents the amount of grain leaving storage and entering the transportation system for use. The drop in disappearance suggests there was a corresponding drop in transportation, either in barge, rail, or truck movements. Between September 1 and December 1, barge movements along the Mississippi River were 21 percent below the 5-year average because of record-low water levels. However, the drop in barge movements accounted for only around a third of the drop in disappearance, and rail movements were up only slightly over the period. The fact that barge accounted for such a small share of the drop suggests truck movements were also down over the period.

At the commodity level, soybean disappearance rose 81.0 mbu (6 percent), and wheat disappearance rose 50.8 mbu (11 percent) compared to the 5-year average, but these were overshadowed by corn disappearance (down 254.5 mbu, or 6 percent). More specifically, soybean exports and the number of soybeans crushed (a major domestic use category) each rose 2 percent from the 5-year average.⁴ Wheat exports were flat, but total domestic use rose significantly (20 percent over the 5-year average).⁵ Over this period, corn exports fell significantly (32 percent below the 5-year average), whereas total domestic use fell slightly (3 percent below the 5-year average).⁶

Although data sources revealing grain movement patterns after December 1 are limited, a few sources do exist. Based on projected ending stocks in USDA's February [World Agricultural Supply and Demand Estimates \(WASDE\)](#), there will be a disappearance of 13 bbu of corn, soybeans, and wheat between December 1, 2022, and the ends of the marketing year (MY)—May 31 for wheat and August 31 for corn and soybeans. Compared to the 5-year average, this projection is down 2 percent, suggesting lower transportation demand through the rest of the marketing year. So far, from December 1, 2022, to early February, rail grain carloads were down 1 percent from the 5-year average, and barge shipments were 11 percent below the 5-year average.

A Look Ahead to the Upcoming Marketing Year

On February 23, USDA released its first supply and demand estimates for MY 2023/24. According to the [Grains and Oilseeds Outlook](#), U.S. producers are projected to harvest 15.1 bbu of corn, 4.5 bbu of soybeans, and 0.4 bbu of grain sorghum in the fall. At 1.8 bbu (10 percent) above last year, the volume would be a record harvest if it occurs, and would signal higher transportation demand throughout the marketing year. A rough assessment can also be made regarding potential fall storage availability: fall corn, soybeans, and sorghum supplies are projected at 21.5 bbu—3.9 bbu less than the current storage capacity level.⁷ This projected margin between storage capacity and supplies is 11 percent below the previous 4-year-average margin. During harvest, if this tight storage projection is actualized, it will add pressure on transportation, at least nationally, but important State-level variations will exist ([October 6, 2022 GTR](#)). Austin.Hunt@usda.gov

³ USDA's Agricultural Marketing Service, [The Effects of Increased Shuttle-Train Movements of Grain and Oilseeds](#), August 2013.

⁴ NASS, Fats and Oils: Oilseed Crushings, Production, Consumption and Stocks, various issues.

⁵ USDA's Economic Research Service (ERS), [Wheat Data: Yearbook Tables](#), February 9, 2023.

⁶ ERS, [Feed Grains: Yearbook Tables](#), February 13, 2023.

⁷ Fall corn, soybeans, and sorghum supplies come from new marketing year production plus the previous marketing year's ending stocks. One of this analysis's limitations is that wheat and other small grain stocks for fall 2023 are not known. Incorporating this data would boost supplies and tighten storage somewhat. On the other side of the equation, temporary and emergency storage options (not considered in the calculation) would increase capacity to store grain.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Non-Shuttle	Shuttle		Gulf	Pacific
03/01/23	288	327	252	264	217	188
02/22/23	294	327	250	279	214	184

¹Indicator: Base year 2000 = 100. Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan (\$/metric ton); n/a = not available due to holiday.

Source: USDA, Agricultural Marketing Service.

Table 2

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

Commodity	Origin-destination	2/24/2023	2/17/2023
Corn	IL-Gulf	-0.94	-0.96
Corn	NE-Gulf	-0.71	-0.71
Soybean	IA-Gulf	-1.53	-1.50
HRW	KS-Gulf	-2.30	-2.40
HRS	ND-Portland	-2.21	-2.21

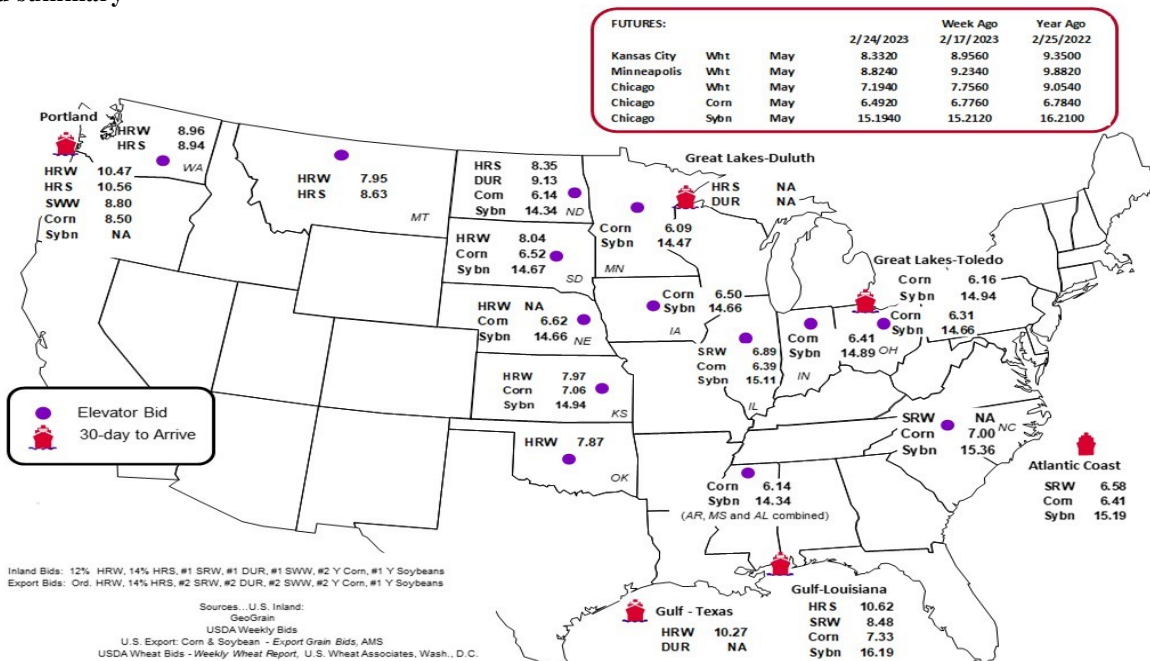
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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

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

For the week ending: 2/18/2023	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,975	2,357	11,015	1,282	5,235	21,864	6,157	4,545
This week last year	1,800	2,134	12,872	1,196	6,980	24,982	4,109	4,177
2023 YTD	14,528	19,754	78,609	9,293	40,088	162,272	37,938	33,446
2022 YTD	12,712	15,598	83,853	9,504	45,776	167,443	24,189	25,268
2023 YTD as % of 2022 YTD	114	127	94	98	88	97	157	132
Last 4 weeks as % of 2022*	107	129	87	103	85	92	150	121
Last 4 weeks as % of 3-yr. avg.**	108	121	92	127	96	99	143	117
Total 2022	93,313	130,359	570,232	66,338	296,945	1,157,187	214,424	214,010

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

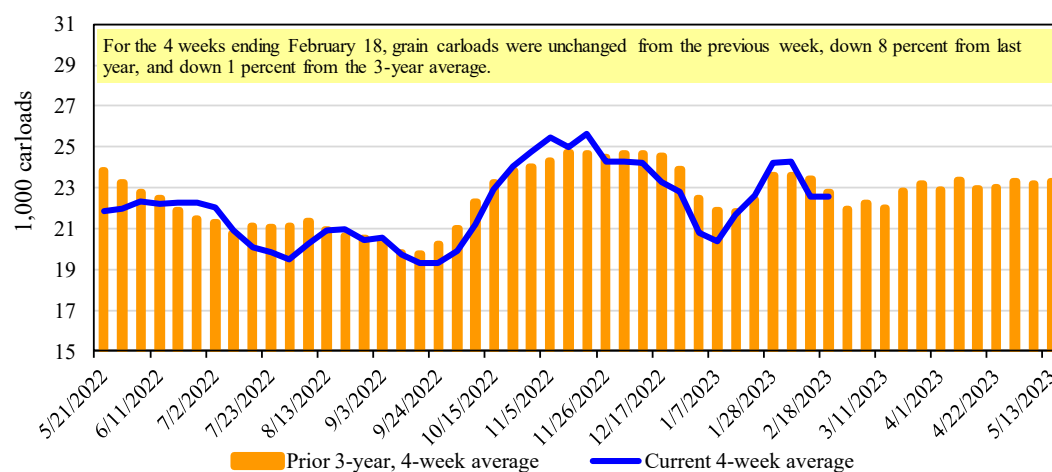
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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

Source: Association of American Railroads.

Figure 2

Total weekly U.S. Class I railroad grain carloads



Source: Association of American Railroads.

Table 4

Railcar auction offerings¹ (\$/car)²

For the week ending: 2/23/2023		Delivery period							
		Mar-23	Mar-22	Apr-23	Apr-22	May-23	May-22	Jun-23	Jun-22
BNSF ³	COT grain units	no offer	no bids	no offer	no bids	no offer	no bids	no offer	no bids
	COT grain single-car	no offer	0	no offer	0	no offer	0	no offer	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 offer	no offer	no offer	no offer	no offer	n/a	n/a

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

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

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

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

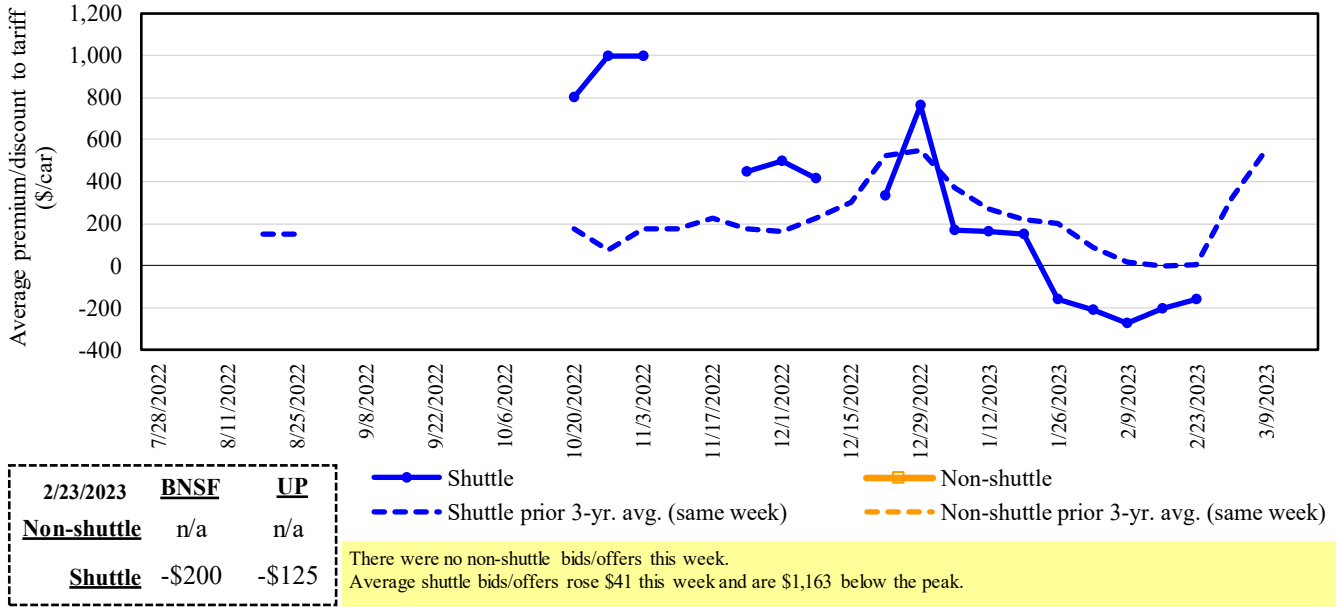
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

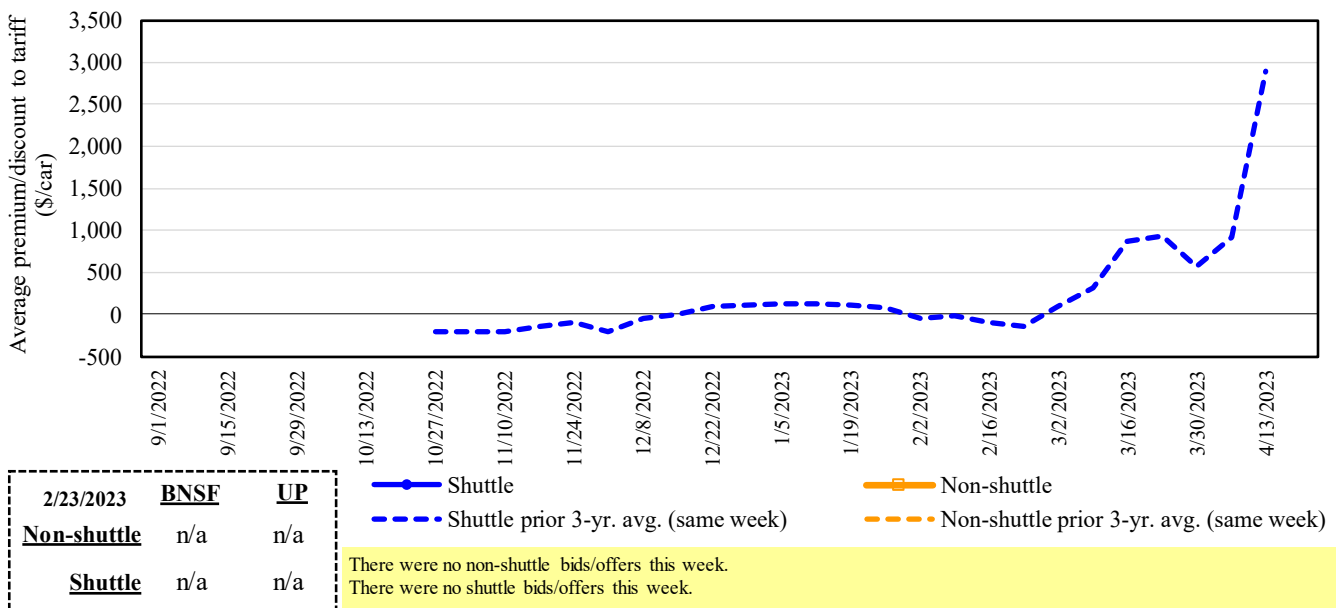
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 3
Secondary market bids/offers for railcars to be delivered in March 2023



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.

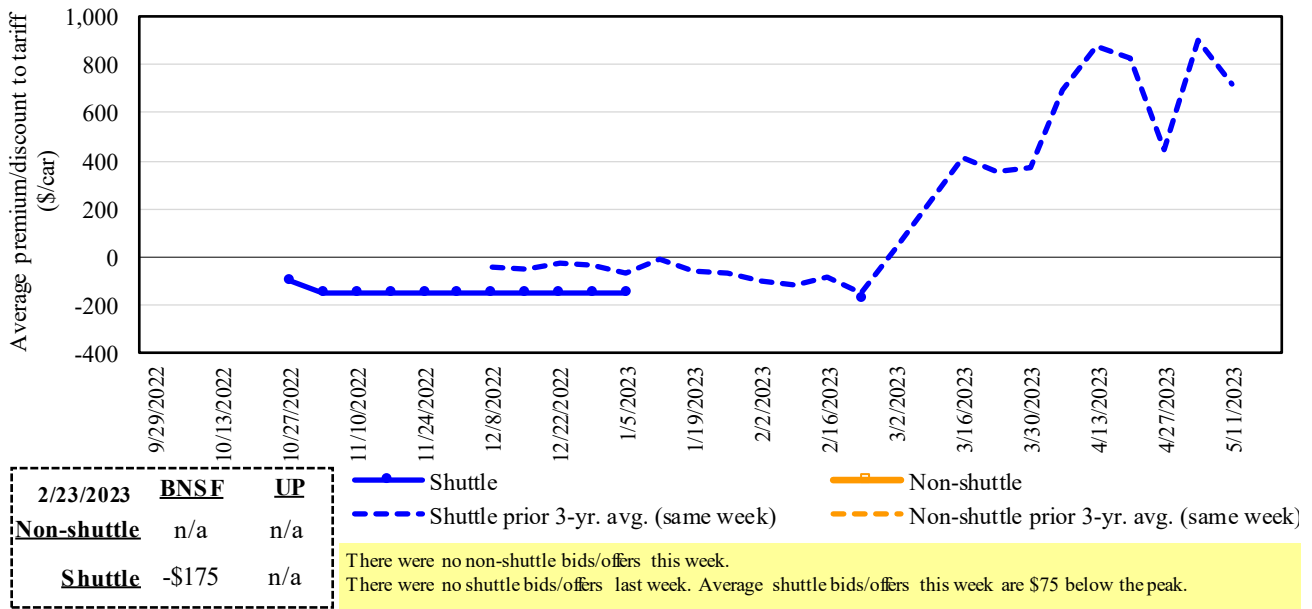
Figure 4
Secondary market bids/offers for railcars to be delivered in April 2023



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

Secondary market bids/offers for railcars to be delivered in May 2023



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 5

Weekly secondary railcar market (\$/car)¹

For the week ending: 2/23/2023		Delivery period					
		Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23
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 2022	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 2022	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	(200)	n/a	(175)	n/a	n/a	(150)
	Change from last week	0	n/a	n/a	n/a	n/a	0
	Change from same week 2022	(225)	n/a	(19)	n/a	n/a	0
	UP-Pool	(125)	n/a	n/a	n/a	n/a	n/a
	Change from last week	81	n/a	n/a	n/a	n/a	n/a
	Change from same week 2022	(400)	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 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 6

Tariff rail rates for unit and shuttle train shipments¹

March 2023	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	\$3,695	\$253	\$39.21	\$1.07	2
	Grand Forks, ND	Duluth-Superior, MN	\$3,858	\$101	\$39.32	\$1.07	7
	Wichita, KS	Los Angeles, CA	\$7,490	\$520	\$79.55	\$2.16	7
	Wichita, KS	New Orleans, LA	\$4,600	\$445	\$50.10	\$1.36	7
	Sioux Falls, SD	Galveston-Houston, TX	\$7,226	\$427	\$76.00	\$2.07	7
	Colby, KS	Galveston-Houston, TX	\$4,850	\$488	\$53.00	\$1.44	6
	Amarillo, TX	Los Angeles, CA	\$5,121	\$679	\$57.59	\$1.57	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$503	\$44.72	\$1.14	4
	Toledo, OH	Raleigh, NC	\$8,551	\$559	\$90.47	\$2.30	7
	Des Moines, IA	Davenport, IA	\$2,655	\$107	\$27.42	\$0.70	7
	Indianapolis, IN	Atlanta, GA	\$6,593	\$420	\$69.64	\$1.77	8
	Indianapolis, IN	Knoxville, TN	\$5,564	\$272	\$57.95	\$1.47	7
	Des Moines, IA	Little Rock, AR	\$4,250	\$313	\$45.31	\$1.15	8
	Des Moines, IA	Los Angeles, CA	\$6,130	\$912	\$69.93	\$1.78	9
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,856	\$774	\$45.98	\$1.25	13
	Toledo, OH	Huntsville, AL	\$7,037	\$398	\$73.84	\$2.01	6
	Indianapolis, IN	Raleigh, NC	\$7,843	\$567	\$83.51	\$2.27	8
	Indianapolis, IN	Huntsville, AL	\$5,689	\$269	\$59.17	\$1.61	7
Champaign-Urbana, IL	New Orleans, LA	\$4,865	\$503	\$53.31	\$1.45	7	
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,393	\$299	\$46.60	\$1.27	9
	Wichita, KS	Galveston-Houston, TX	\$4,311	\$233	\$45.12	\$1.23	1
	Chicago, IL	Albany, NY	\$7,090	\$528	\$75.65	\$2.06	8
	Grand Forks, ND	Portland, OR	\$6,051	\$517	\$65.22	\$1.78	9
	Grand Forks, ND	Galveston-Houston, TX	\$5,399	\$538	\$58.96	\$1.60	10
	Colby, KS	Portland, OR	\$5,923	\$800	\$66.76	\$1.82	4
Corn	Minneapolis, MN	Portland, OR	\$5,660	\$629	\$62.46	\$1.59	12
	Sioux Falls, SD	Tacoma, WA	\$5,620	\$576	\$61.53	\$1.56	12
	Champaign-Urbana, IL	New Orleans, LA	\$4,170	\$503	\$46.41	\$1.18	10
	Lincoln, NE	Galveston-Houston, TX	\$4,360	\$336	\$46.63	\$1.18	12
	Des Moines, IA	Amarillo, TX	\$4,670	\$394	\$50.28	\$1.28	8
	Minneapolis, MN	Tacoma, WA	\$5,660	\$624	\$62.41	\$1.59	12
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,580	\$646	\$61.82	\$1.57	13
	Sioux Falls, SD	Tacoma, WA	\$6,350	\$576	\$68.78	\$1.87	11
	Minneapolis, MN	Portland, OR	\$6,400	\$629	\$69.80	\$1.90	11
	Fargo, ND	Tacoma, WA	\$6,250	\$512	\$67.15	\$1.83	10
	Council Bluffs, IA	New Orleans, LA	\$5,095	\$580	\$56.36	\$1.53	8
	Toledo, OH	Huntsville, AL	\$5,277	\$398	\$56.36	\$1.53	9
Grand Island, NE	Portland, OR	\$5,730	\$819	\$65.03	\$1.77	13	

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 7

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

Date: December 2021					Tariff rate plus		Percent change ⁴
Commodity	Origin state	Destination region	Tariff rate per car ¹	Fuel surcharge per car ²	fuel surcharge per:		
					metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,699	\$0	\$78.67	\$2.14	4
	OK	Cuautitlan, EM	\$6,900	\$230	\$72.85	\$1.98	6
	KS	Guadalajara, JA	\$7,619	\$719	\$85.19	\$2.32	7
	TX	Salinas Victoria, NL	\$4,420	\$138	\$46.57	\$1.27	4
Corn	IA	Guadalajara, JA	\$9,102	\$663	\$99.77	\$2.53	6
	SD	Celaya, GJ	\$8,300	\$0	\$84.81	\$2.15	2
	NE	Queretaro, QA	\$8,322	\$462	\$89.75	\$2.28	5
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,687	\$450	\$83.14	\$2.11	5
	SD	Torreón, CU	\$7,825	\$0	\$79.95	\$2.03	2
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$614	\$94.63	\$2.57	5
	NE	Guadalajara, JA	\$9,207	\$646	\$100.67	\$2.74	5
	IA	El Castillo, JA	\$9,510	\$0	\$97.17	\$2.64	1
	KS	Torreón, CU	\$8,109	\$466	\$87.61	\$2.38	5
Sorghum	NE	Celaya, GJ	\$7,932	\$597	\$87.15	\$2.21	6
	KS	Queretaro, QA	\$8,108	\$287	\$85.77	\$2.18	3
	NE	Salinas Victoria, NL	\$6,713	\$231	\$70.94	\$1.80	3
	NE	Torreón, CU	\$7,225	\$438	\$78.29	\$1.99	6

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.

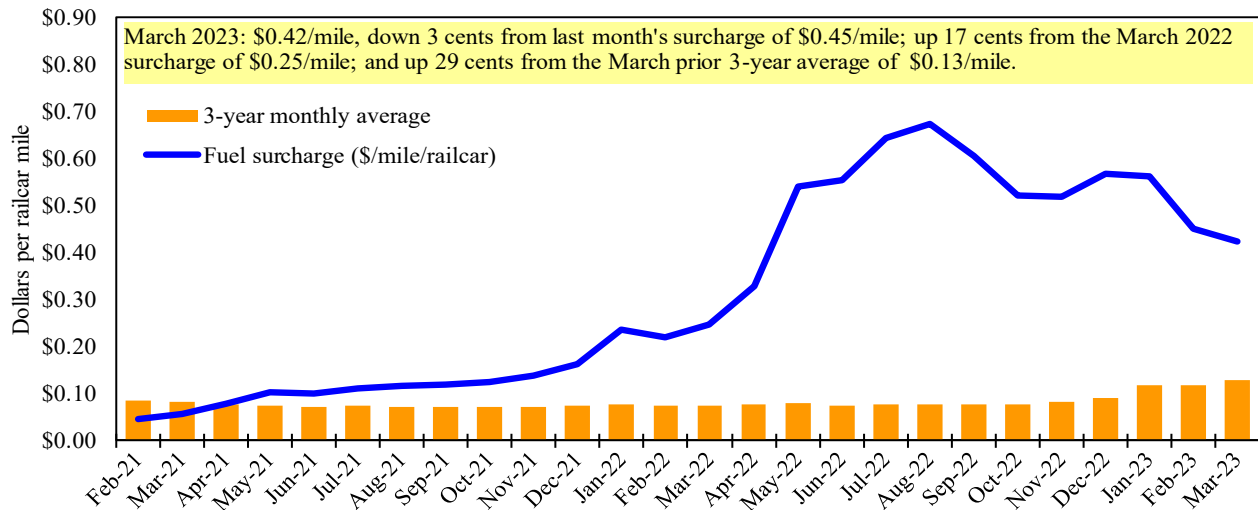
⁵As of January 1, 2022, both BNSF and Union Pacific changed their billing and reporting of rates to Mexico.

As we incorporate the change, Table 7 updates will be delayed.

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

Figure 6

Railroad fuel surcharges, North American weighted average¹



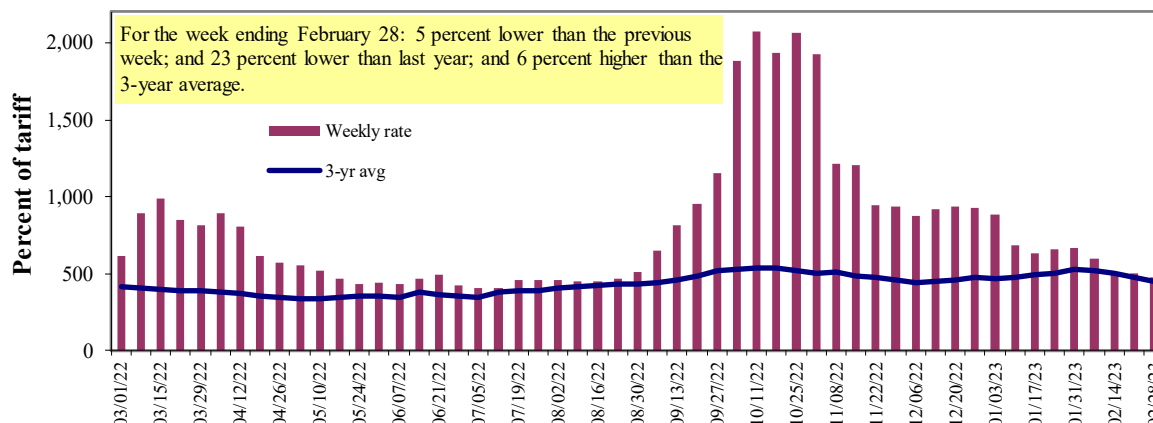
¹Weighted by each Class I railroad's proportion of grain traffic for the prior year.

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

Barge Transportation

Figure 7

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: USDA, Agricultural Marketing Service.

Table 8

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	2/28/2023	-	505	476	357	410	410	293
	2/21/2023	-	-	502	375	453	453	305
\$/ton	2/28/2023	-	26.87	22.09	14.24	19.23	16.56	9.20
	2/21/2023	-	-	23.29	14.96	21.25	18.30	9.58
Current week % change from the same week:								
	Last year	-	-19	-23	-26	-21	-21	-32
	3-year avg. ²	-	-	6	7	11	11	-2
Rate ¹	March	-	511	481	359	406	406	290
	May	531	494	478	357	394	394	287

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; "-" data not available.
Source: USDA, Agricultural Marketing Service.

Figure 8 Benchmark tariff rates

Calculating barge rate per ton:
(Rate * 1976 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

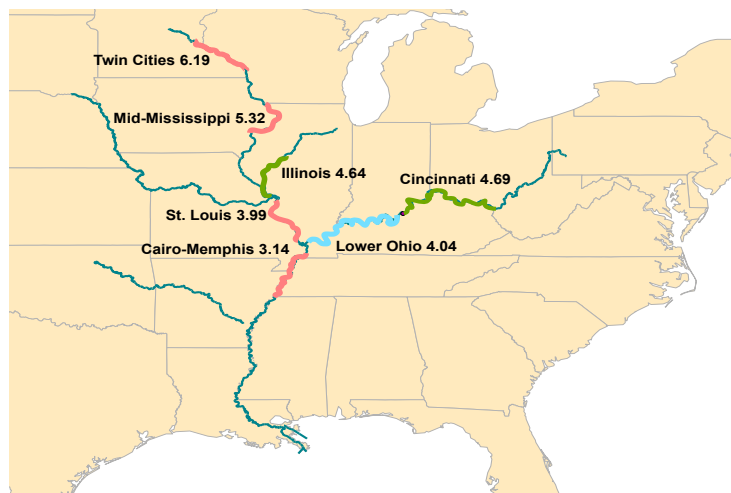
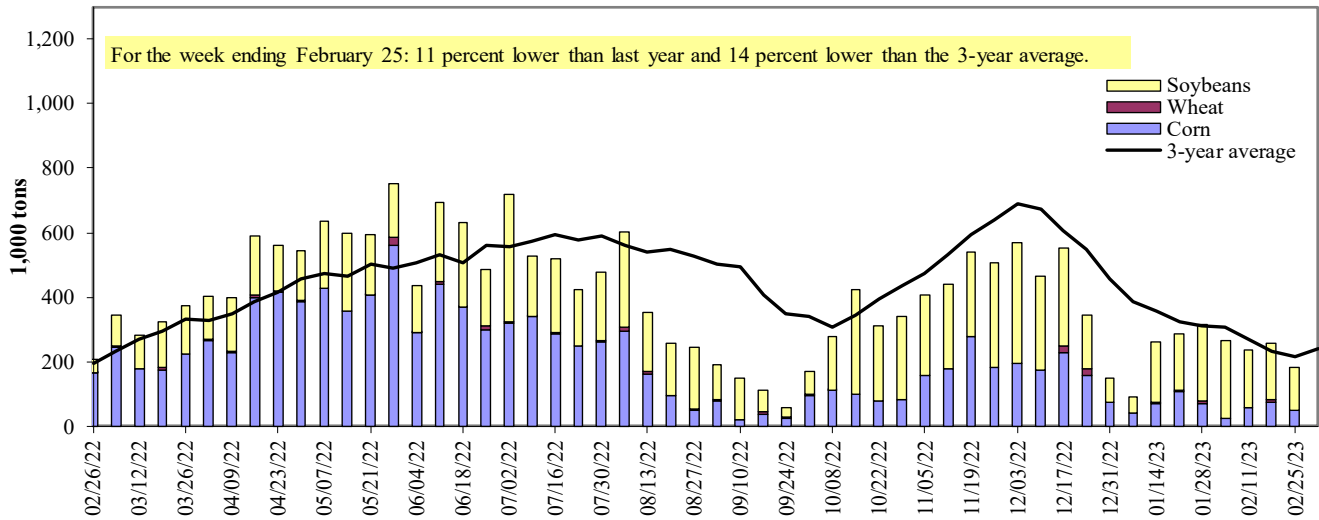


Figure 9

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



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

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

Source: U.S. Army Corps of Engineers.

Table 9

Barge grain movements (1,000 tons)

For the week ending 02/25/2023	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)	40	0	137	0	176
Granite City, IL (L27)	51	0	133	0	184
Illinois River (La Grange)	57	0	124	0	181
Ohio River (Olmsted)	127	25	53	5	210
Arkansas River (L1)	0	14	4	0	18
Weekly total - 2023	178	39	190	5	412
Weekly total - 2022	329	38	167	0	534
2023 YTD ¹	1,521	184	2,658	69	4,431
2022 YTD ¹	2,227	204	1,926	27	4,383
2023 as % of 2022 YTD	68	90	138	261	101
Last 4 weeks as % of 2022 ²	71	130	163	48	107
Total 2022	16,437	1,594	14,464	232	32,727

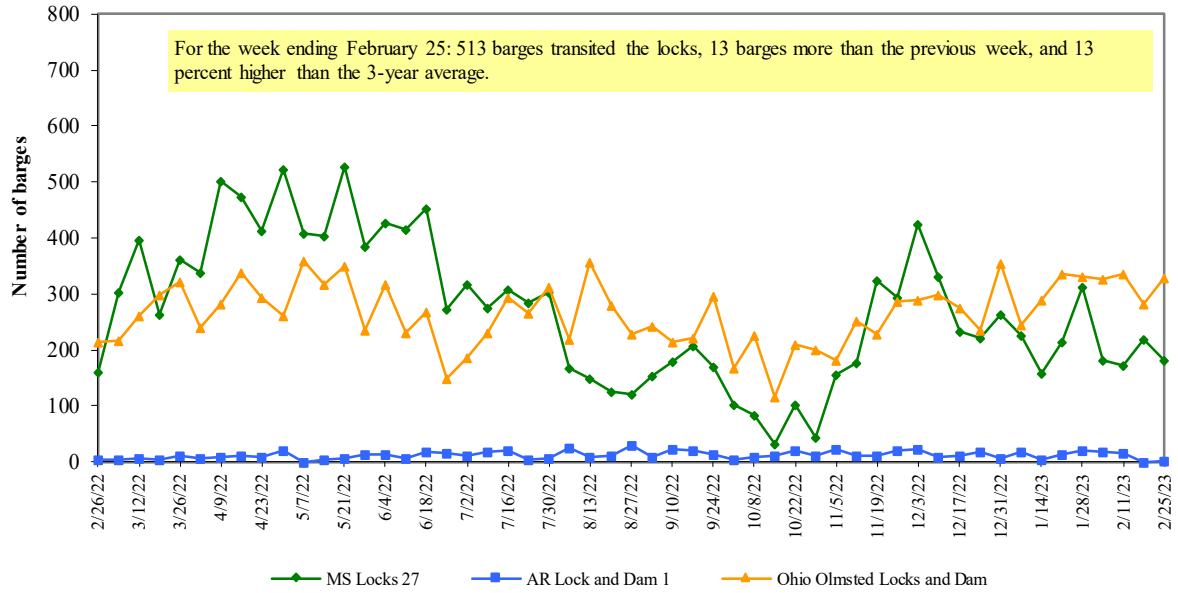
¹ Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. Total may not add exactly due to rounding.

² As a percent of same period in 2022.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.

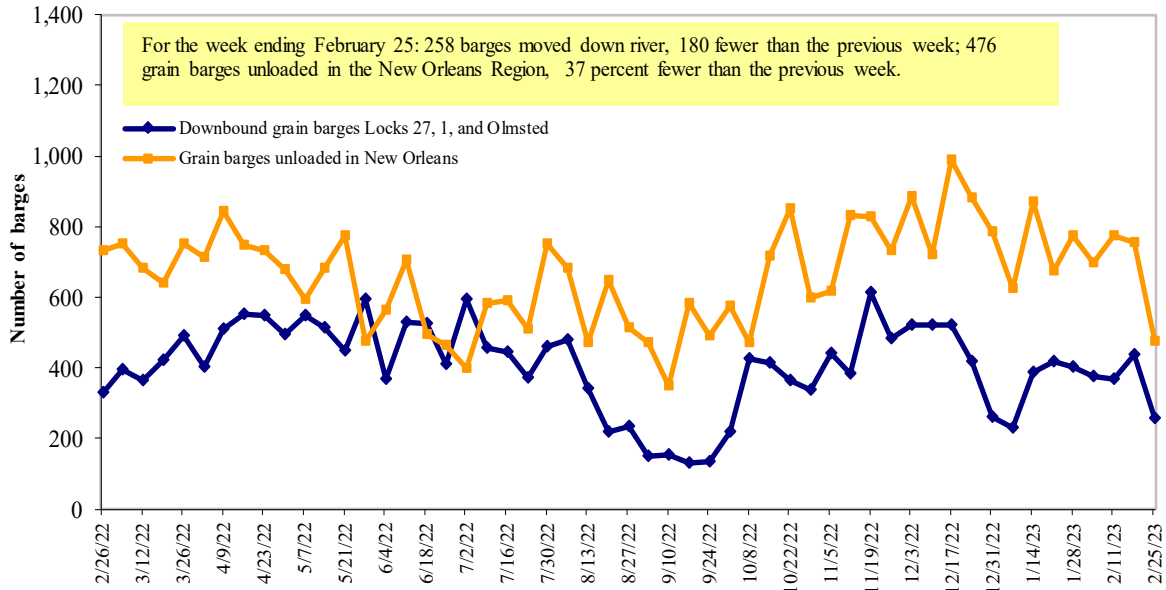
Source: U.S. Army Corps of Engineers.

Figure 10
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
 Source: U.S. Army Corps of Engineers.

Figure 11
Grain barges for export in New Orleans region



Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
 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 10

Retail on-highway diesel prices, week ending 2/27/2023 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.446	-0.126	0.285
	New England	4.825	-0.136	0.667
	Central Atlantic	4.771	-0.099	0.462
	Lower Atlantic	4.286	-0.135	0.217
II	Midwest	4.120	-0.074	0.152
III	Gulf Coast	4.027	-0.073	0.155
IV	Rocky Mountain	4.559	-0.062	0.583
	West Coast	4.933	-0.039	0.222
V	West Coast less California	4.564	-0.029	0.269
	California	5.357	-0.050	0.280
Total	United States	4.294	-0.082	0.190

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

Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

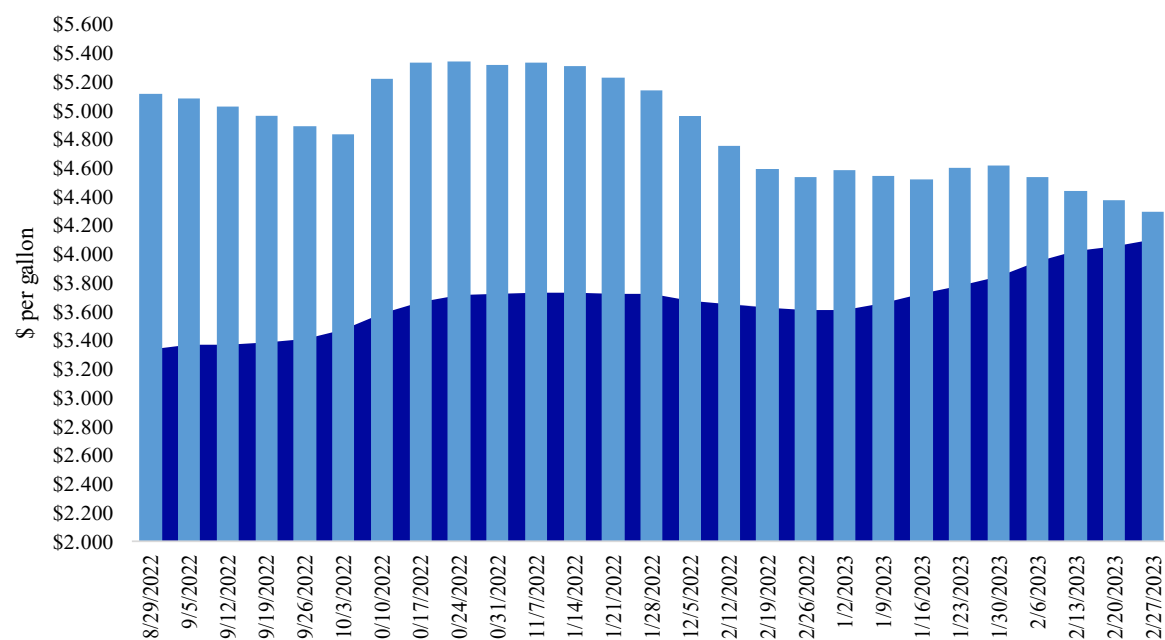
Source: U.S. Department of Energy, Energy Information Administration.

Figure 12

Weekly diesel fuel prices, U.S. average

For the week ending February 27, the U.S. average diesel fuel price decreased 8.2 cents from the previous week to \$4.294 per gallon, 19.0 cents above the same week last year.

■ Last year \$4.104 ■ Current year \$4.294



Note: On June 13, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.

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

Grain Exports

Table 11

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									
2/16/2023	757	633	1,056	1,036	69	3,549	14,277	7,729	25,555
This week year ago	1,870	642	1,051	618	20	4,200	23,355	9,284	36,839
Cumulative exports-marketing year²									
2022/23 YTD	3,836	2,014	4,014	3,194	245	13,301	14,363	40,850	68,514
2021/22 YTD	5,367	2,001	3,722	2,542	150	13,782	24,219	40,025	78,026
YTD 2022/23 as % of 2021/22	71	101	108	126	163	97	59	102	88
Last 4 wks. as % of same period 2021/22	44	101	108	178	440	90	59	104	74
Total 2021/22	7,172	2,786	5,254	3,261	196	18,669	59,764	57,189	135,622
Total 2020/21	8,422	1,790	7,500	6,438	656	24,807	66,958	60,571	152,335

¹ Current unshipped (outstanding) export sales to date.

² Shipped export sales to date.

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 12

Top 5 importers¹ of U.S. corn

For the week ending 2/16/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
	1,000 mt -			
Mexico	12,554	13,678	(8)	15,227
China	4,411	12,086	(64)	12,616
Japan	2,849	6,812	(58)	10,273
Columbia	1,119	3,055	(63)	4,398
Korea	266	83	221	2,563
Top 5 importers	21,199	35,715	(41)	45,077
Total U.S. corn export sales	28,640	47,573	(40)	56,665
% of projected exports	58%	76%		
Change from prior week ²	823	1,041		
Top 5 importers' share of U.S. corn export sales	74%	75%		80%
USDA forecast February 2023	48,982	62,875	(22)	
Corn use for ethanol USDA forecast, February 2023	133,350	135,281	(1)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; marketing year (MY) = Sep 1 - Aug 31.

²Cumulative 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.

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 13

Top 5 importers¹ of U.S. soybeans

For the week ending 2/16/2023	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
China	30,002	26,209	14	27,283
Mexico	3,968	4,544	(13)	4,929
Egypt	978	2,749	(64)	3,553
Japan	1,695	1,665	2	2,266
Indonesia	958	1,046	(8)	2,116
Top 5 importers	37,600	36,213	4	40,147
Total U.S. soybean export sales	48,578	49,309	(1)	54,231
% of projected exports	90%	84%		
change from prior week ²	545	1,232		
Top 5 importers' share of U.S. soybean export sales	77%	73%		74%
USDA forecast, February 2023	54,223	58,801	(8)	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2021/22; 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 14

Top 10 importers¹ of all U.S. wheat

For the week ending 2/16/2023	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2022/23 current MY	2021/22 last MY		
				- 1,000 mt -
Mexico	2,901	3,165	(8)	3,566
Philippines	1,910	2,549	(25)	2,985
Japan	1,932	2,150	(10)	2,453
China	819	848	(3)	1,537
Nigeria	739	2,003	(63)	1,528
Korea	1,132	1,197	(5)	1,459
Taiwan	693	767	(10)	1,106
Indonesia	319	67	376	711
Thailand	624	536	16	703
Colombia	471	584	(19)	621
Top 10 importers	11,538	13,865	(17)	16,669
Total U.S. wheat export sales	16,851	17,982	(6)	22,763
% of projected exports	80%	82%		
change from prior week ²	339	517		
Top 10 importers' share of U.S. wheat export sales	68%	77%		73%
USDA forecast, February 2023	21,117	21,798	(3)	

¹ Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; Marketing year (MY) = Jun 1 - May 31.

² Cumulative 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.

³ FAS 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 15

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

Port regions	For the week ending 02/23/23	Previous week*	Current week as % of previous	2023 YTD*	2022 YTD*	2023 YTD as % of 2022 YTD	Last 4-weeks as % of:		2022 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	379	254	149	2,191	1,766	124	128	114	9,836
Corn	6	0	n/a	491	1,980	25	1	1	9,615
Soybeans	71	429	17	3,298	3,113	106	112	122	14,178
Total	456	683	67	5,981	6,859	87	78	84	33,629
Mississippi Gulf									
Wheat	62	61	101	395	603	66	87	123	4,053
Corn	345	399	87	2,473	6,294	39	39	42	30,781
Soybeans	418	990	42	7,800	5,350	146	161	158	31,283
Total	825	1,449	57	10,669	12,248	87	87	91	66,116
Texas Gulf									
Wheat	138	25	560	373	582	64	79	104	3,421
Corn	1	24	5	53	114	46	63	46	648
Soybeans	0	0	n/a	52	0	n/a	0	0	685
Total	139	48	288	478	696	69	77	81	4,754
Interior									
Wheat	33	43	76	425	459	93	70	87	2,912
Corn	203	185	110	1,457	1,380	106	111	125	8,961
Soybeans	142	107	133	1,402	1,186	118	113	120	7,109
Total	378	335	113	3,285	3,025	109	104	117	18,982
Great Lakes									
Wheat	12	12	100	39	18	215	234	633	395
Corn	0	0	n/a	0	0	n/a	n/a	n/a	158
Soybeans	0	0	n/a	2	0	n/a	n/a	n/a	760
Total	12	12	100	41	18	227	234	633	1,312
Atlantic									
Wheat	0	0	n/a	35	4	781	n/a	245	169
Corn	7	5	149	28	25	110	146	437	309
Soybeans	96	141	68	754	513	147	134	159	2,867
Total	102	146	70	817	543	150	144	166	3,345
U.S. total from ports*									
Wheat	623	394	158	3,458	3,433	101	107	112	20,786
Corn	562	613	92	4,503	9,794	46	40	45	50,471
Soybeans	727	1,667	44	13,309	10,162	131	139	142	56,882
Total	1,912	2,674	72	21,269	23,389	91	88	94	128,139

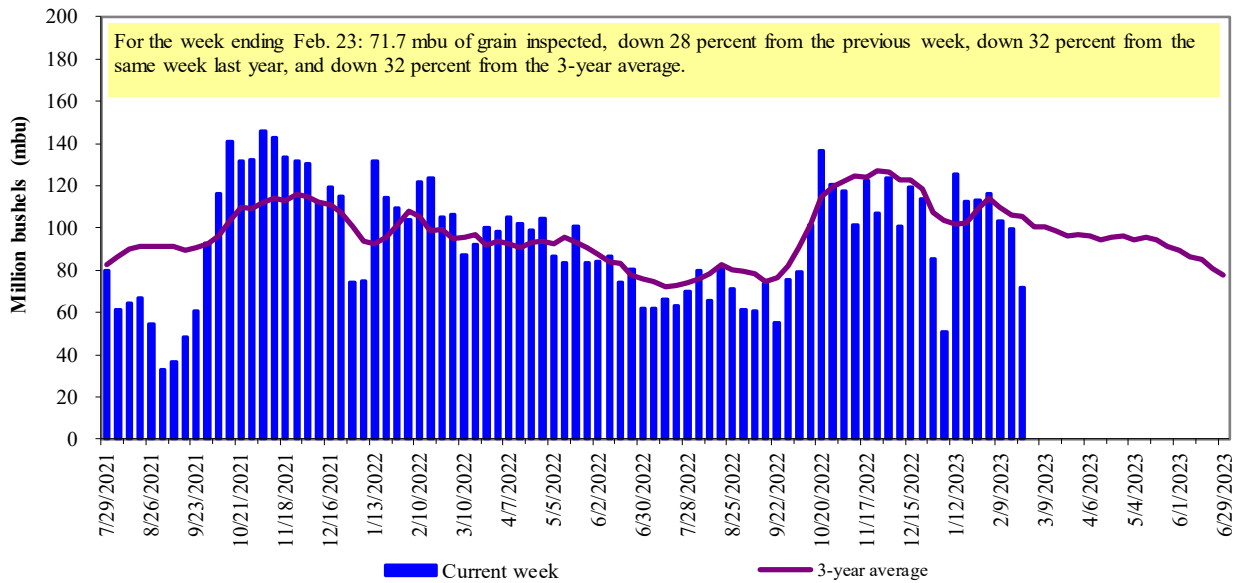
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 13

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

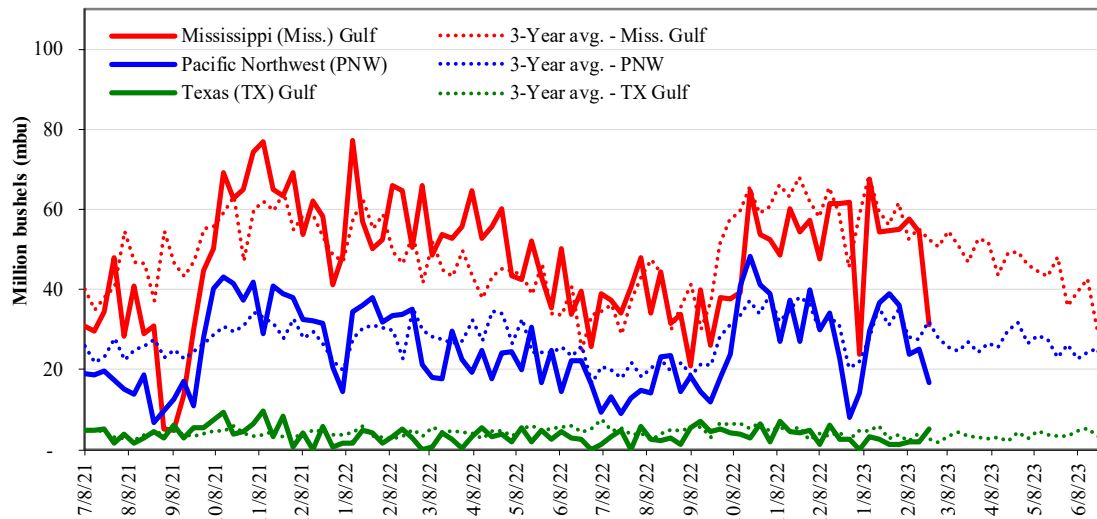


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 14

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



Week ending 02/23/23 inspections (mbu):	Percent change	MS Gulf	TX	U.S. Gulf	PNW
MS Gulf: 31.2	Last wk:	down 43	up 178	down 35	down 33
PNW: 16.8	Last Year (same wk):	down 38	up 65	down 32	down 52
TX Gulf: 5.1	3-yr avg. (4-wk. mov. Avg):	down 44	up 60	down 38	down 45

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 16

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

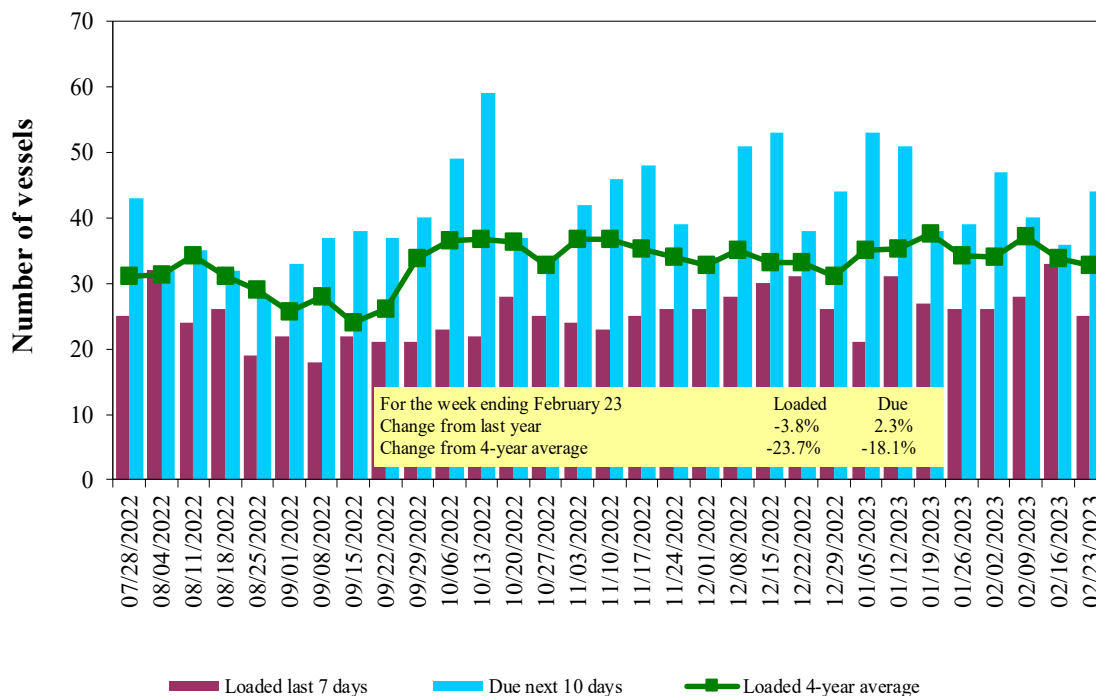
Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
2/23/2023	23	25	44	5
2/16/2023	22	33	36	12
2022 range	(14...61)	(18...39)	(28...62)	(5...23)
2022 average	30	28	44	13

Note: The data is voluntarily collected and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 15

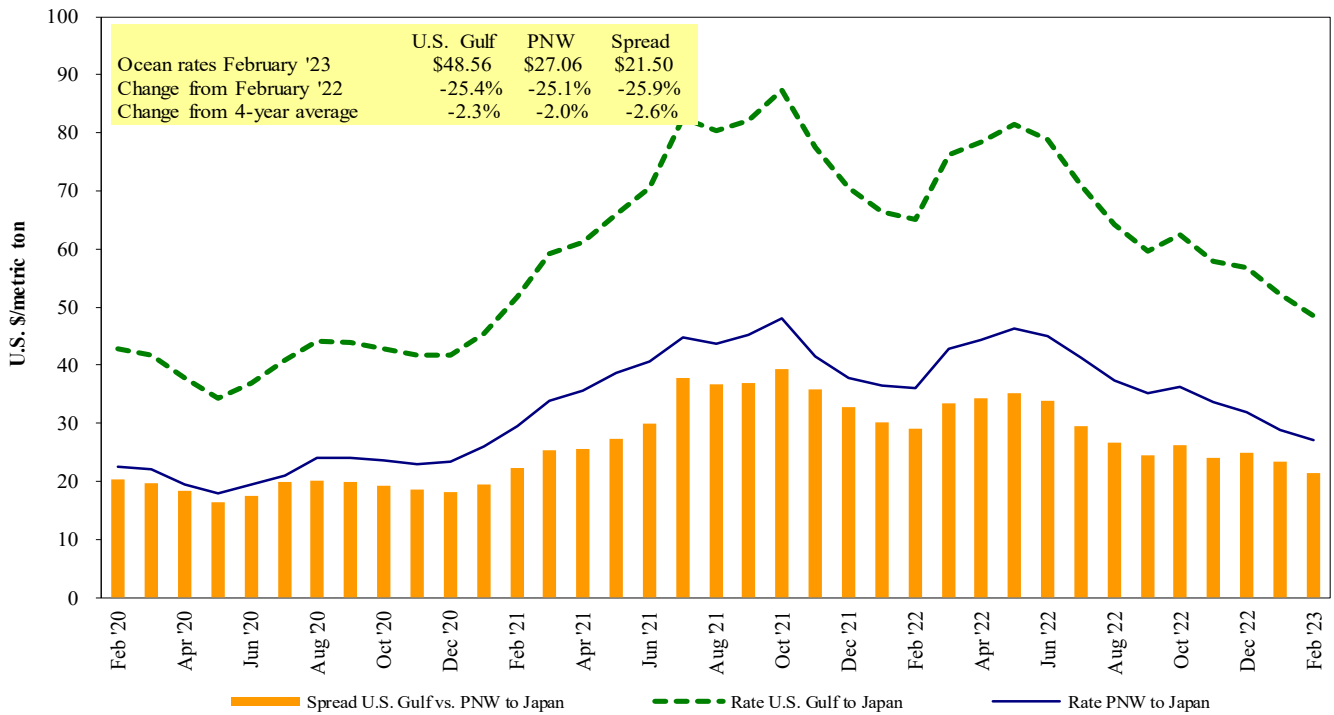
U.S. Gulf¹ vessel loading activity



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

Figure 16

Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 17

Ocean freight rates for selected shipments, week ending 02/25/2023

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	Nov 1/10, 2022	50,000	79.25
U.S. Gulf	Japan	Heavy grain	Jul 20/30, 2022	50,000	81.50
U.S. Gulf	Japan	Heavy grain	Jun 1/10, 2022	50,000	89.65
U.S. Gulf	Japan	Heavy grain	May 1/20, 2022	50,000	78.90
U.S. Gulf	S. China	Corn	Aug 1/10, 2022	68,000	71.00
U.S. Gulf	Kenya	Sorghum	Feb 15/25, 2023	22,820	63.30*
U.S. Gulf	Djibouti	Wheat	Nov 5/15, 2022	22,500	102.88*
U.S. Gulf	S. Korea	Heavy grain	Jun 1/Jul, 2022	55,000	82.75
WC US	Japan	Wheat	Feb 1/Mar 1, 2023	34,500	47.75
Brazil	China	Heavy grain	Feb 4/11	63,000	36.00
Brazil	N. China	Heavy grain	Mar 18/27, 2022	64,000	56.85
Argentina	Taiwan	Corn	May 1/Jun, 2022	65,000	85.00
Australia	Vietnam	Heavy grain	Feb 24/Apr 9, 2023	60,000	20.80

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

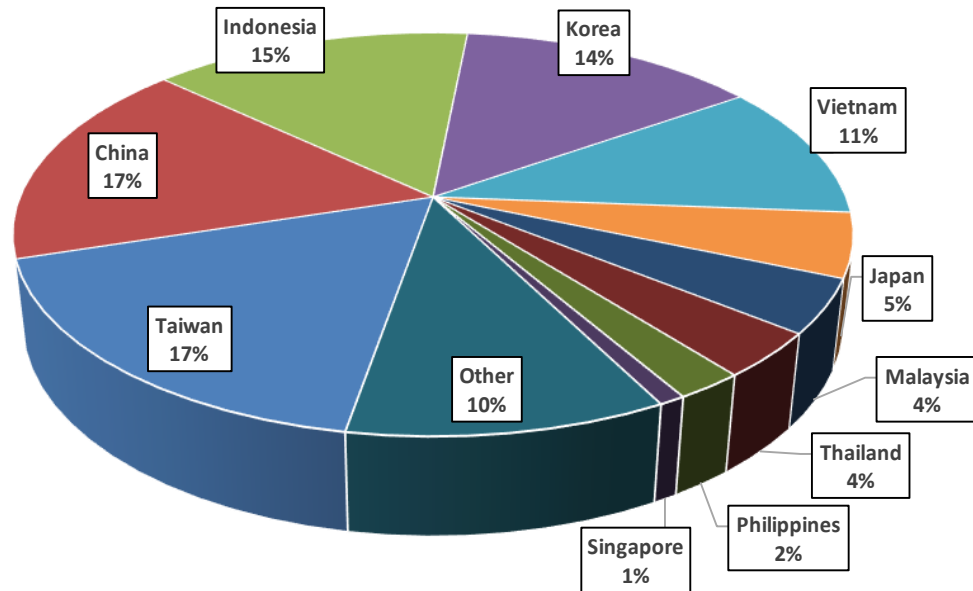
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

op = option.

Source: Maritime Research, Inc.

In 2020, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 66 percent of U.S. waterborne grain exports in 2020 went to Asia, of which 14 percent were moved in containers. Approximately 95 percent of U.S. waterborne containerized grain exports were destined for Asia.

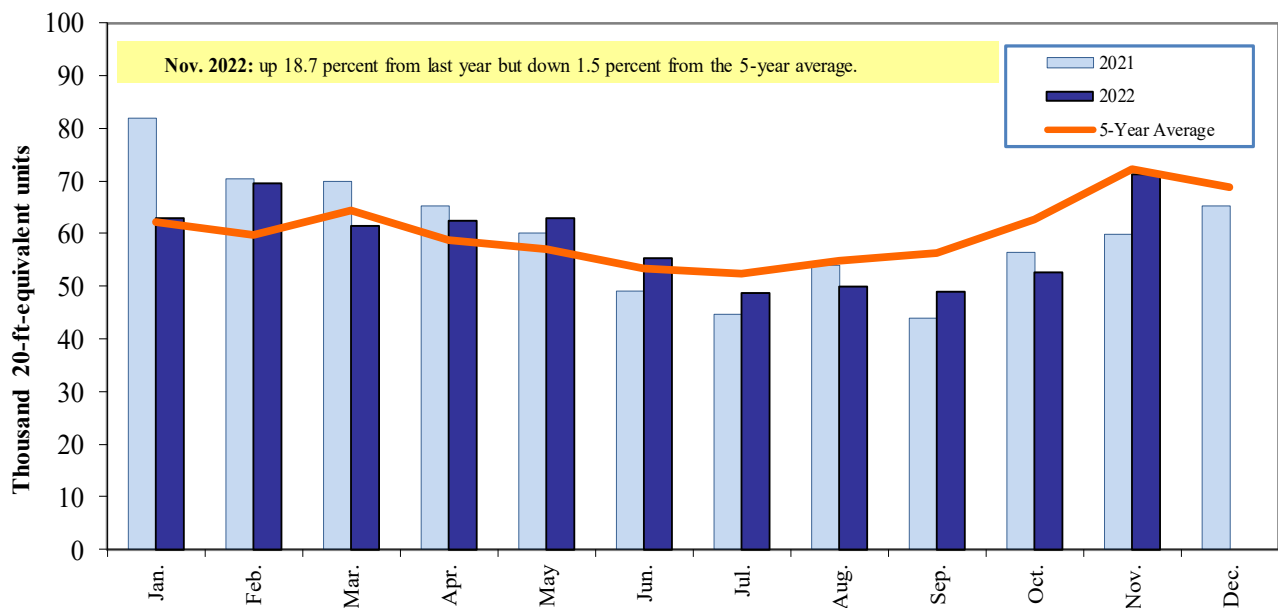
Figure 17
Top 10 destination markets for U.S. containerized grain exports, Jan-Nov 2022



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '230330', '2304', and '230990'.

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

Figure 18
Monthly shipments of U.S. containerized grain exports



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: '1001', '100190', '1002', '100200', '1003', '100300', '1004', '100400', '1005', '100590', '1007', '100700', '110100', '1102', '110220', '110290', '1201', '120100', '120190', '120810', '230210', '230310', '230330', '2304', and '230990'.

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

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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. March 2, 2023. Web: <http://dx.doi.org/10.9752/TS056.03-02-2023>

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