



Grain Transportation Report

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

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October 1, 2020

WEEKLY HIGHLIGHTS

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FMCSA Extends Waiver for Commercial Driver's License/Learner's Permit Holders

On September 18, the Federal Motor Carrier Safety Administration (FMCSA) [extended its waiver](#) from certain regulations affecting holders of interstate and intrastate commercial driver's licenses (CDL) and commercial learner's permits (CLP), as well as other interstate drivers operating commercial motor vehicles (CMVs). FMCSA originally initiated this action in response to the COVID-19 pandemic on June 9, 2020. The waiver recognizes, as part of States' phased reopenings, most State Driver Licensing Agencies (SDLAs) have resumed only limited operations. These service limitations may hinder drivers' attempts to renew CDLs and CLPs or provide SDLAs with medical certificates. Also, because of limited operations or backlogs, drivers may not be able to schedule physical examinations to comply with the Federal Motor Carrier safety regulations. Effective October 1, 2020, the waiver expires on December 31, 2020.

STB To Hold Meeting on Rail Performance and Planning Issues

The Surface Transportation Board (STB) will hold a [virtual meeting](#) of its Rail Energy Transportation Advisory Committee on Wednesday, October 7, 2020. The meeting will facilitate discussions on such issues as rail service, infrastructure planning and development, and effective coordination among suppliers, rail carriers, and users of energy resources. The agenda may include a review of rail performance measures, industry segment updates by committee members, and a roundtable discussion.

FMCSA Launches New Panel to Collect Feedback on Drivers' Concerns

The U.S. Department of Transportation's Federal Motor Carrier Safety Administration (FMCSA) is launching [a new panel](#) of its Motor Carrier Safety Advisory Committee (MCSAC). Hailing from all sectors of the commercial motor vehicle (CMV) industry, the panel will comprise 20 to 25 drivers, including tractor trailer drivers, straight truck drivers, motor coach drivers, hazardous materials drivers, and agriculture haulers. The panel will give FMCSA direct feedback on the driving community's concerns, such as safety, hours-of-service regulations, training, parking, and driver experience. The panel aims to capture the CMV community's varied viewpoints and experiences.

DOT Awards \$20.8 Million to St. Louis Bi-State Regional Ports Improvement Project

On September 16, the U.S. Department of Transportation (DOT) announced the award of \$1 billion in grants to [70 infrastructure projects](#) in 44 states. These include barge loading and rail upgrades for three ports under the St. Louis Bi-State Regional Ports Improvement Project. With such upgrades as new grain storage, conveyer equipment, and additional railroad track, the facilities will expand capacity, reduce wait times, and attract more traffic. Known as Better Utilizing Investments to Leverage Development (BUILD) Transportation Discretionary grants, the grants fund planning and capital investments in surface transportation infrastructure. To better address the needs of rural America, 50 percent of BUILD Transportation grant funding will be awarded to projects that benefit rural communities.

Snapshots by Sector

Export Sales

For the week ending September 17, [unshipped balances](#) of wheat, corn, and soybeans totaled 57.9 million metric tons (mmt). This represented a significant increase in outstanding sales from the same time last year. Net [corn export sales](#) were 2.1 mmt, up 33 percent from the past week. Net [soybean export sales](#) were 3.2 mmt, up 30 percent from the previous week. Net weekly [wheat export sales](#) were 0.351 mmt, up 5 percent from the previous week.

Rail

U.S. Class I railroads originated 22,130 [grain carloads](#) during the week ending September 19. This was a 3-percent increase from the previous week, 16 percent more than last year, and 5 percent more than the 3-year average.

Average October shuttle [secondary railcar](#) bids/offers (per car) were \$1,529 above tariff for the week ending September 24. This was \$304 more than last week and \$1,798 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending September 26, [barge grain movements](#) totaled 510,200 tons. This was 1 percent more than the previous week and 10 percent less than the same period last year.

For the week ending September 26, 312 grain barges [moved down river](#)—6 barges fewer than the previous week. There were 712 grain barges [unloaded in New Orleans](#), 12 percent higher than the previous week.

Ocean

For the week ending September 24, 24 [oceangoing grain vessels](#) were loaded in the Gulf—17 percent fewer than the same period last year. Within the next 10 days (starting September 25), 61 vessels were expected to be loaded—56 percent more than the same period last year.

As of September 24, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$43.25. This was 1 percent less than the previous week. The rate from the Pacific Northwest (PNW) to Japan was \$23.75 per mt, unchanged from the previous week.

Fuel

For the week ending September 28, the U.S. average [diesel fuel price](#) decreased 1.0 cent from the previous week to \$2.394 per gallon, 67.2 cents below the same week last year.

Rising Export Sales of Corn and Soybeans Could Boost Demand for Grain Transportation

The U.S. corn and soybean export markets together account for about 70 percent of the total grains and oilseeds exported. As major drivers of the demand for grain transportation, these markets have been rocked by large shifts in recent years. Among the many factors that have caused these shifts are U.S. agricultural trade policy, China’s role in the broader international grain and oilseed markets, competition from Brazil and Ukraine, and the global coronavirus pandemic. For the last several years, the collective, cumulative effect of these various factors has been added variability to the corn and soybean export markets. It remains to be seen how the trends will play out, though corn and soybean export sales currently show some signs of growth. Year-to-date 2020/21 outstanding (unshipped) export balances and cumulative (shipped) exports are up notably from 2019/20 (*GTR table 12*). Despite some of the same challenges, wheat export sales are also growing slowly. This article primarily focuses on the demand for U.S. grain transportation and China’s role in driving the market.

Exports Sales of Corn and Soybeans Begin To Recover

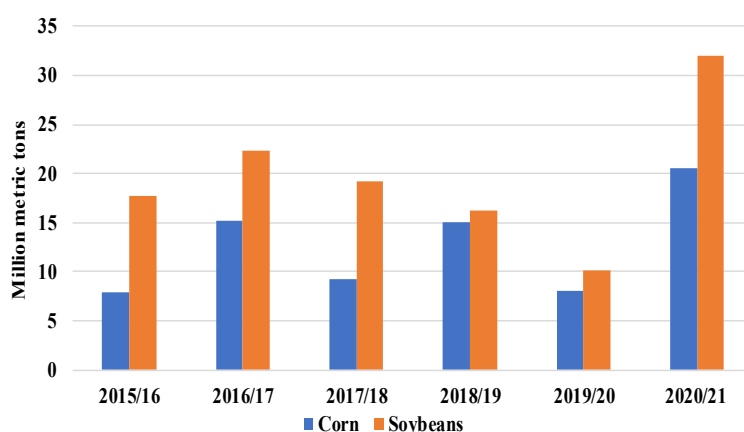
For the current marketing year (MY) 2020/21, which began September 1, 2020, transportation demand for U.S. corn and soybean exports is significantly higher than for the same period last year. This is mainly because of more exports to China (fig. 1 and *GTR tables 13 and 14*). Accumulated corn exports for the new marketing year to date (YTD) are 58 percent higher than 2019. China accounted for 43 percent of the YTD total corn export commitments, followed by Mexico (17 percent), and Japan (11 percent).

Looking forward, total YTD outstanding corn sales are 21 mmt—more than double those of the same time last year. Representing sold volumes that have not yet shipped, outstanding sales indicate future transportation demand. According to USDA’s September 11 *World Agricultural Supply and Demand Estimates (WASDE)*, MY 2020/21 U.S. corn exports are projected to be 59.2 mmt, 4 percent higher than last month’s projections. U.S. corn exports are expected to increase by 32 percent from MY 2019/20 because of less production in the EU and Ukraine (figs. 1 and 2).

As of September 17, outstanding soybean export sales (32 mmt) are also more than triple those for the same period last year, with China accounting for 53 percent (fig. 2 and *GTR table 14*). Soybean exports projections for MY 2020/21 remain unchanged from last month, but according to WASDE, are expected to increase by 26 percent from MY 2019/20 (figs. 1 and 2).

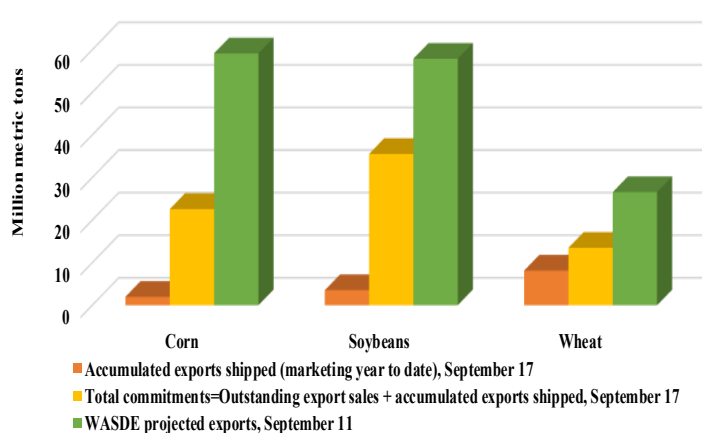
Compared to the same period last year, total wheat commitments (13.5 mmt) are 7 percent higher, while accumulated exports are 3 percent higher (fig. 3). However—if the United States sustains competitive prices, its

Figure 1: Outstanding sales of U.S. corn and soybeans: 2015/16-2020/21 year to date



Source: USDA, Foreign Agricultural Service.

Figure 2: Export indicators 2020/21: total commitments, accumulated and projected exports



Source: USDA, Foreign Agricultural Service, and USDA, World Agricultural Supply and Demand Estimates.

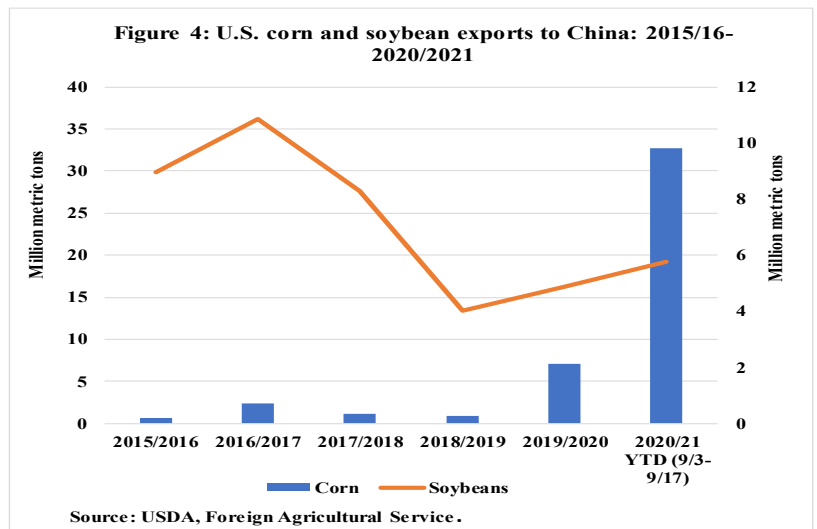
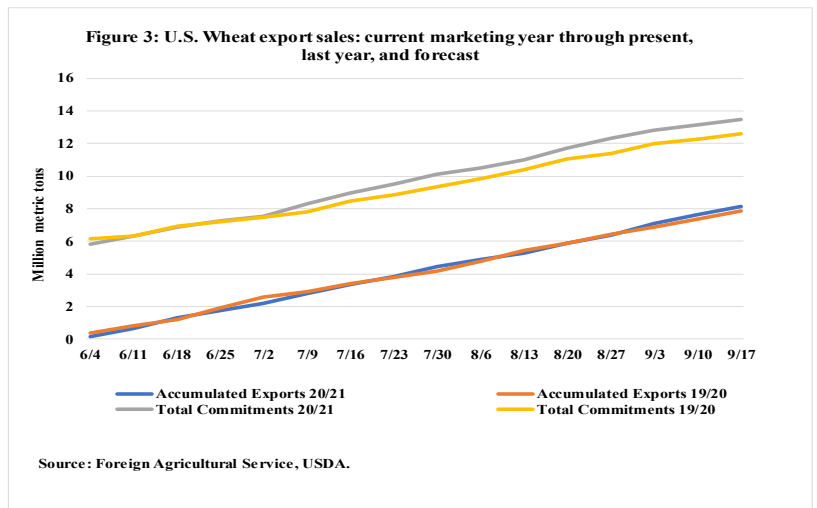
freight advantage, and its relationship with buyers—the Nation may soon ship more wheat to Brazil. The recent opening of Brazil’s tariff rate quota and slowed Argentine exports to Brazil may create opportunity for the United States. In the September [WASDE](#), U.S. wheat exports are projected to remain unchanged from last month, but are 1 percent above MY 2019/20 (figs. 2 and 3).

China’s Demand for U.S. Corn and Soybeans Starts To Grow Again

A number of factors suggest future growth in corn and soybean exports to China. These factors include the large year-to-date outstanding sales of corn (9.3 mmt) to China, China’s commitment to the Phase 1 U.S.-China trade agreement, and recent vessel demand, which has been high.¹ Export sales of corn to China are expected to grow for the first time since MY 2013/14. Besides commitment to the Phase 1 U.S.-China trade agreement, China’s rising feed demand and high domestic prices have also contributed to the country’s need to procure competitively priced feed. Additionally, after imposing anti-dumping and countervailing duties on Australian barley, China has been left with few options for corn substitutes. For MY 2019/20, total U.S. corn shipments to China were 2.1 mmt, the largest since MY 2013/14 (fig. 4). Total year-to-date MY 2020/21 U.S. export commitments for corn (accumulated and unshipped) are 9.8 mmt, compared to just 0.060 mmt for the same period last year. (fig. 4 and [GTR table 13](#)).

U.S. soybean exports to China have also increased as a result of the Phase 1 agreement. Total shipments of U.S. soybeans to China for MY 2020/21 to date (19.2 mmt) are significantly higher than for the same period last year (2.1 mmt) ([GTR table 14](#) and fig. 4). Still, Brazil has recently offered more competition to U.S. exports to China in the form of a weak Brazilian real and large soybean harvest. Although MY 2019/20 total soybean shipments to China (16.2 mmt) were 22 percent higher than in FY 2018/19, they were significantly below previous years’ highs (fig. 4). YTD outstanding sales to China reflect possible increased future demand across all modes of transportation. The YTD average barge grain shipment on the Mississippi River is 30 percent larger than the same time last year ([GTR table 10](#)), and from August 27 to September 24, an average of 62 oceangoing grain vessels were expected to load within the next 10 days in the U.S. Gulf, compared to 39 vessels during the prior 10 weeks (see [GTR figure 16](#)). Similar patterns can also be seen in rail.

Because of multiple ongoing influences on trade, it is possible the strong early-season export sales may not result in greater total exports. However, if the early projections (based on current trends) are realized, the higher exports would significantly increase the demand for transportation. Kranti.Mulik@usda.gov



¹ According to the Phase-1 deal, China “shall ensure” additional purchases of U.S. agriculture products by \$32 billion over 2 years, including \$12.5 billion above the corresponding 2017 baseline of \$24 billion in 2020 and \$19.5 billion above the baseline in 2021.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge*	Ocean	
		Unit train	Shuttle		Gulf	Pacific
09/30/20	161	280	287	261	193	168
09/23/20	161	280	274	247	195	168

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);

*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.

n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

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

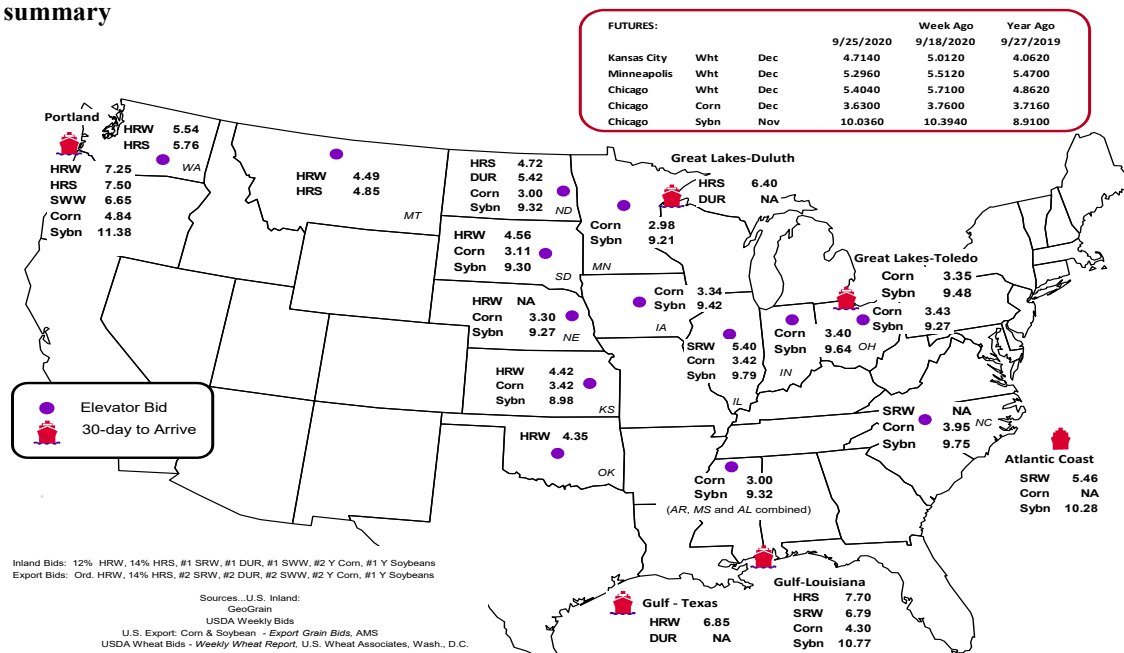
Commodity	Origin-destination	9/25/2020	9/18/2020
Corn	IL-Gulf	-0.88	-0.81
Corn	NE-Gulf	-1.00	-0.95
Soybean	IA-Gulf	-1.35	-1.33
HRW	KS-Gulf	-2.43	-2.38
HRS	ND-Portland	-2.78	-2.56

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			
9/23/2020 ^p	1,075	1,532	7,142	268	10,017	9/19/2020	2,941
9/16/2020 ^r	1,494	1,549	6,152	499	9,694	9/12/2020	2,261
2020 YTD ^r	20,209	36,354	186,376	7,945	250,884	2020 YTD	93,695
2019 YTD ^r	35,253	42,723	191,763	13,495	283,234	2019 YTD	92,562
2020 YTD as % of 2019 YTD	57	85	97	59	89	% change YTD	101
Last 4 weeks as % of 2019 ²	252	181	149	210	164	Last 4wks. % 2019	92
Last 4 weeks as % of 4-year avg. ²	211	109	134	141	137	Last 4wks. % 4 yr.	92
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,674

¹Data is incomplete as it is voluntarily provided.

²Compared with same 4-weeks in 2019 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.

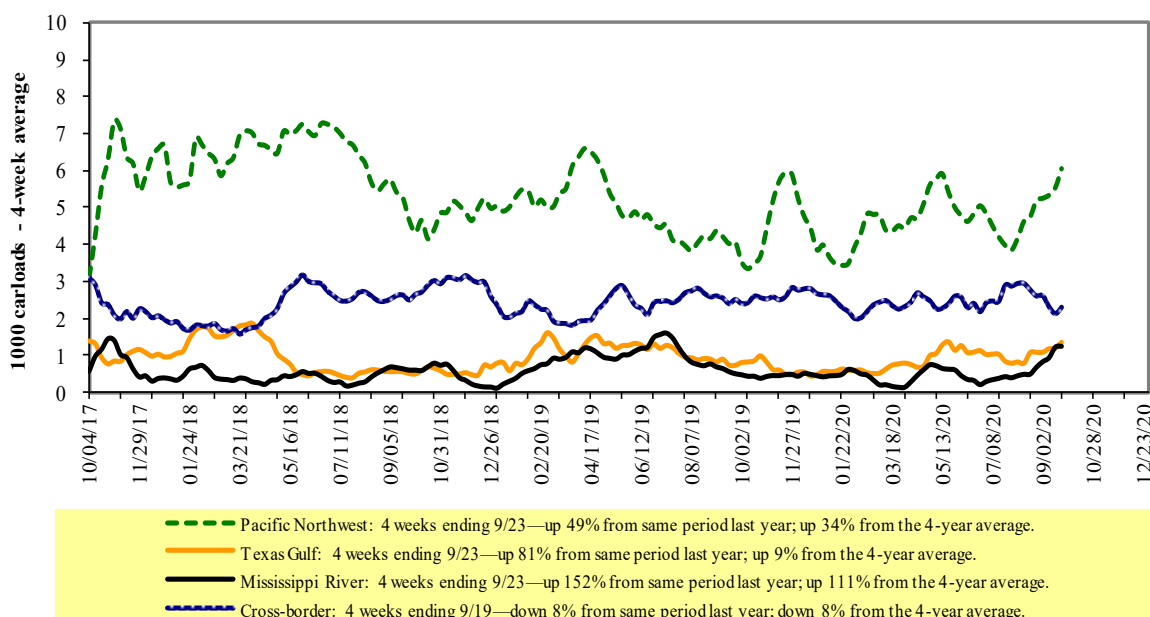
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 9/19/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,770	1,624	11,714	1,134	5,888	22,130	4,641	4,944
This week last year	1,747	1,932	9,808	1,012	4,572	19,071	3,346	4,274
2020 YTD	61,723	90,245	410,140	39,735	195,708	797,551	156,692	174,553
2019 YTD	68,913	104,673	415,998	42,546	193,611	825,741	152,987	167,746
2020 YTD as % of 2019 YTD	90	86	99	93	101	97	102	104
Last 4 weeks as % of 2019*	95	100	119	101	122	115	153	107
Last 4 weeks as % of 3-yr. avg.**	103	89	113	115	116	110	119	106
Total 2019	91,611	136,966	568,369	58,527	260,269	1,115,742	212,507	235,892

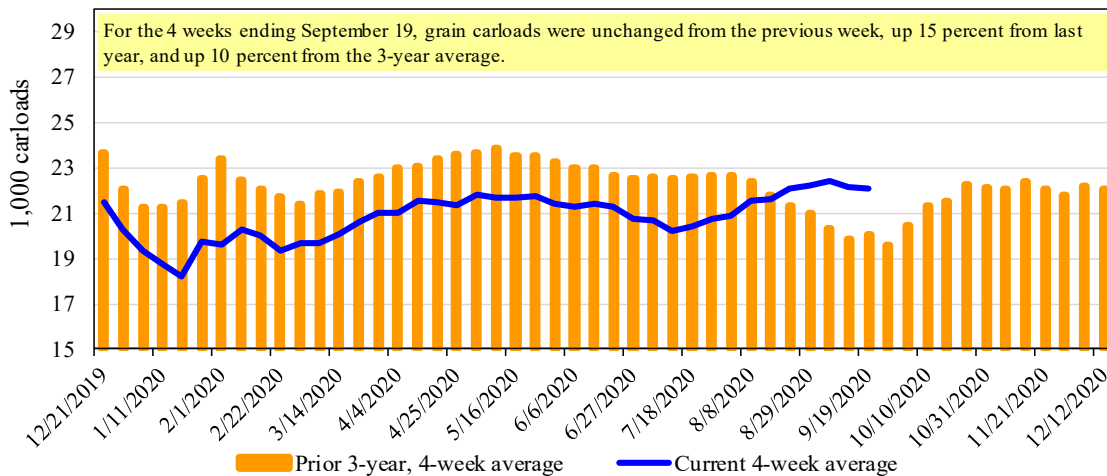
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 9/24/2020		Delivery period							
		Oct-20	Oct-19	Nov-20	Nov-19	Dec-20	Dec-19	Jan-21	Jan-20
BNSF ³	COT grain units	no offer	0	102	no bid	9	no bid	23	no offer
	COT grain single-car	no offer	1	397	0	405	0	301	no offer
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	0	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no offer	440	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.

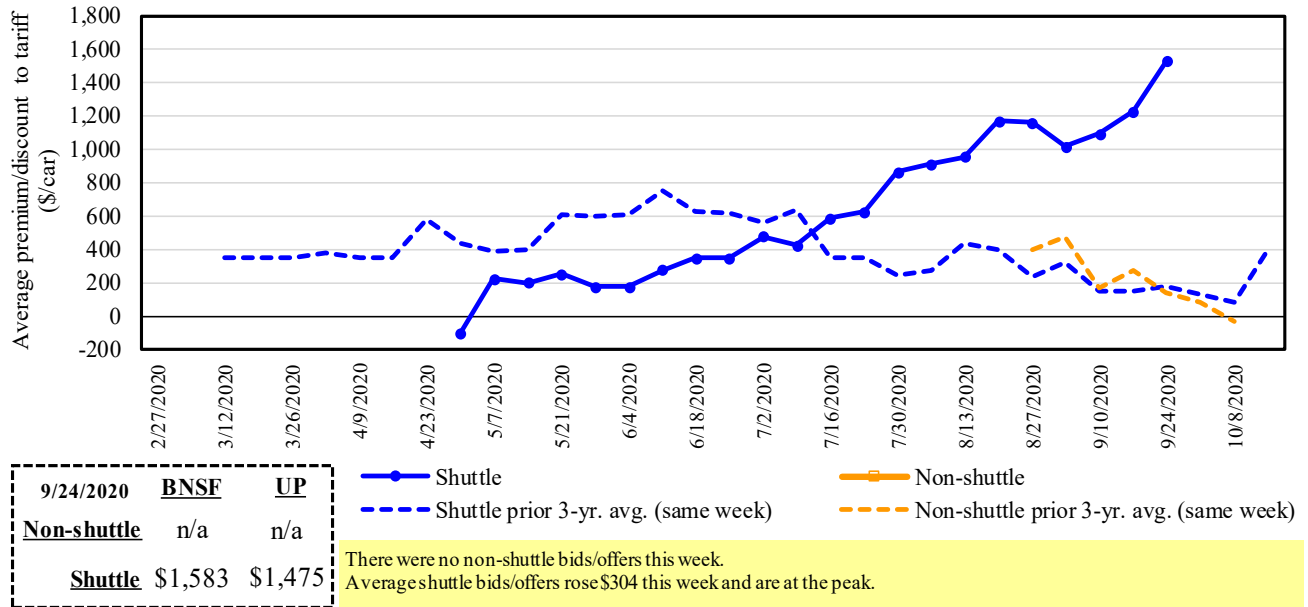
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

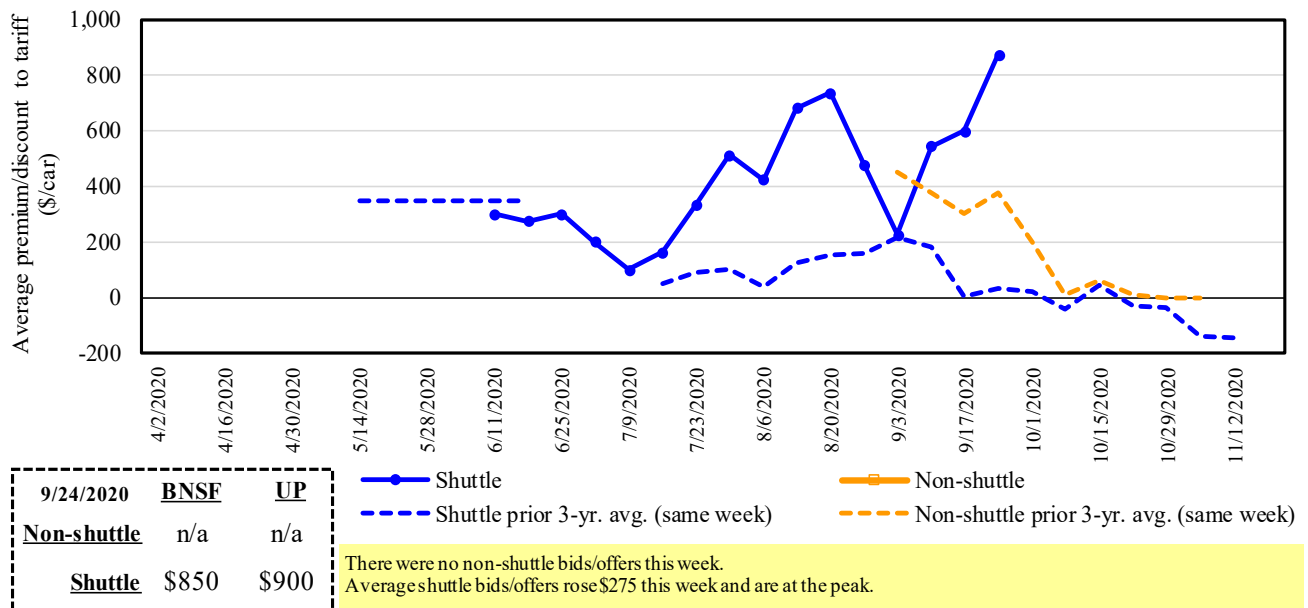
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/offers for railcars to be delivered in October 2020, 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.

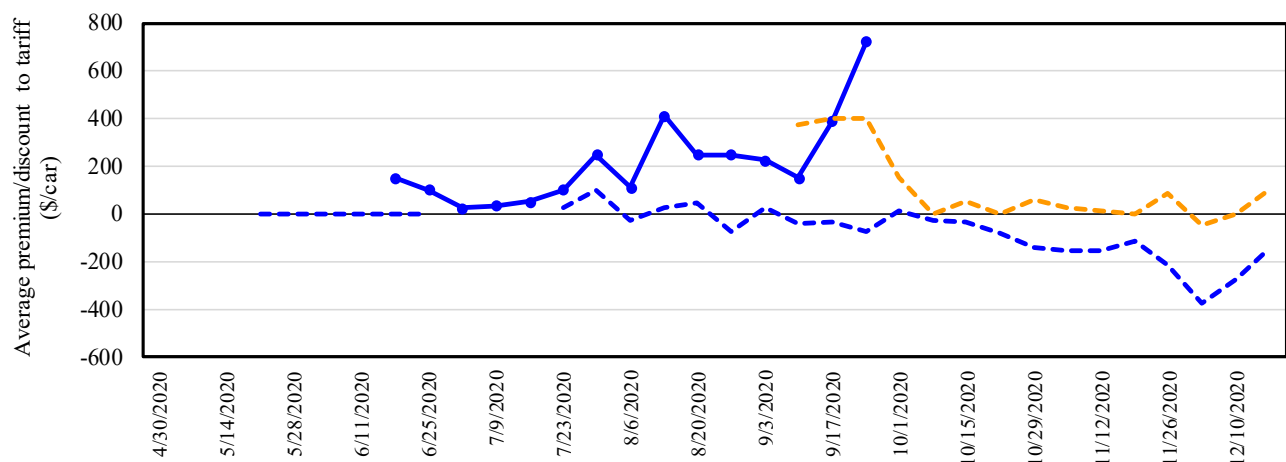
Figure 5
Bids/offers for railcars to be delivered in November 2020, secondary market



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 December 2020, secondary market



9/24/2020	BNSF	UP	Shuttle	Non-shuttle
Non-shuttle	n/a	n/a	Shuttle prior 3-yr. avg. (same week)	Non-shuttle prior 3-yr. avg. (same week)
Shuttle	\$800	\$650	There were no non-shuttle bids/offers this week. Average shuttle bids/offers rose \$338 this week and are at the peak.	

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: 9/24/2020		Delivery period					
		Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-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 2019	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 2019	n/a	n/a	n/a	n/a	n/a	n/a	
Shuttle	BNSF-GF	1583	850	800	900	n/a	n/a
	Change from last week	133	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	1852	n/a	n/a	n/a	n/a	n/a
	UP-Pool	1475	900	650	750	n/a	n/a
	Change from last week	475	300	262	550	n/a	n/a
Change from same week 2019	n/a	n/a	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

October 2020	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	\$35	\$39.90	\$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	\$62	\$45.55	\$1.24	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,851	\$0	\$68.03	\$1.85	-2
	Colby, KS	Galveston-Houston, TX	\$4,801	\$68	\$48.35	\$1.32	-2
	Amarillo, TX	Los Angeles, CA	\$5,121	\$95	\$51.80	\$1.41	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$70	\$39.43	\$1.00	-3
	Toledo, OH	Raleigh, NC	\$7,833	\$0	\$77.79	\$1.98	15
	Des Moines, IA	Davenport, IA	\$2,455	\$15	\$24.53	\$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
	Des Moines, IA	Little Rock, AR	\$3,900	\$44	\$39.16	\$0.99	1
	Des Moines, IA	Los Angeles, CA	\$5,780	\$128	\$58.67	\$1.49	-2
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$37	\$36.43	\$0.99	-4
	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	\$70	\$46.83	\$1.27	-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	\$112	\$60.81	\$1.66	-3
	Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31
Sioux Falls, SD		Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
Champaign-Urbana, IL		New Orleans, LA	\$3,820	\$70	\$38.63	\$0.98	-3
Lincoln, NE		Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
Des Moines, IA		Amarillo, TX	\$4,320	\$55	\$43.45	\$1.10	0
Minneapolis, MN		Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
Council Bluffs, IA		Stockton, CA	\$5,100	\$0	\$50.65	\$1.29	2
Soybeans	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	\$81	\$49.22	\$1.34	-3
	Toledo, OH	Huntsville, AL	\$4,945	\$0	\$49.11	\$1.34	3
	Grand Island, NE	Portland, OR	\$5,260	\$115	\$53.37	\$1.45	-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 8

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

Date: October 2020			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	\$49	\$69.08	\$1.88	-2
	KS	Guadalajara, JA	\$7,471	\$413	\$80.55	\$2.19	-3
	TX	Salinas Victoria, NL	\$4,329	\$29	\$44.53	\$1.21	-1
Corn	IA	Guadalajara, JA	\$8,902	\$331	\$94.34	\$2.39	-2
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	0
	NE	Queretaro, QA	\$8,300	\$99	\$85.82	\$2.18	-2
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,665	\$97	\$79.30	\$2.01	-2
	SD	Torreon, CU	\$7,690	\$0	\$78.57	\$1.99	0
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$312	\$90.52	\$2.46	-2
	NE	Guadalajara, JA	\$9,157	\$321	\$96.83	\$2.63	-2
	IA	El Castillo, JA	\$9,410	\$0	\$96.15	\$2.61	-1
	KS	Torreon, CU	\$8,014	\$212	\$84.05	\$2.29	-1
Sorghum	NE	Celaya, GJ	\$7,772	\$285	\$82.33	\$2.09	-2
	KS	Queretaro, QA	\$8,108	\$61	\$83.46	\$2.12	-1
	NE	Salinas Victoria, NL	\$6,713	\$49	\$69.09	\$1.75	-1
	NE	Torreon, CU	\$7,092	\$187	\$74.38	\$1.89	-3

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.

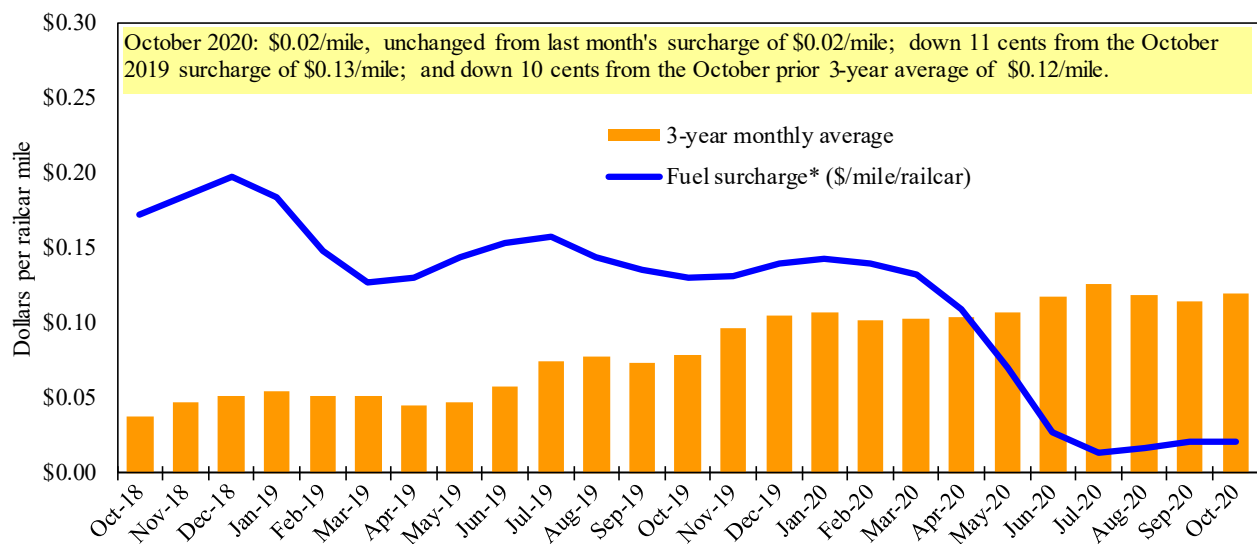
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

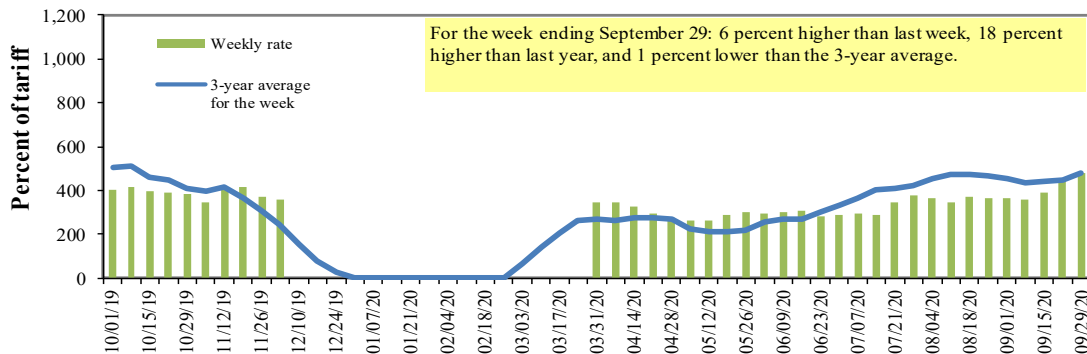
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8a

Mid-Mississippi 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 9

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate ¹	9/29/2020	510	477	-	361	424	424	332
	9/22/2020	500	452	-	353	413	413	344
\$/ton	9/29/2020	31.57	25.38	-	14.40	19.89	17.13	10.42
	9/22/2020	30.95	24.05	-	14.08	19.37	16.69	10.80
Current week % change from the same week:								
	Last year	42	18	-	-14	-2	-2	-9
	3-year avg. ²	6	-1	-	-14	-14	-14	-23
Rate ¹	September	513	427	-	304	376	376	281
	November	0	0	414	275	317	317	252

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:
(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

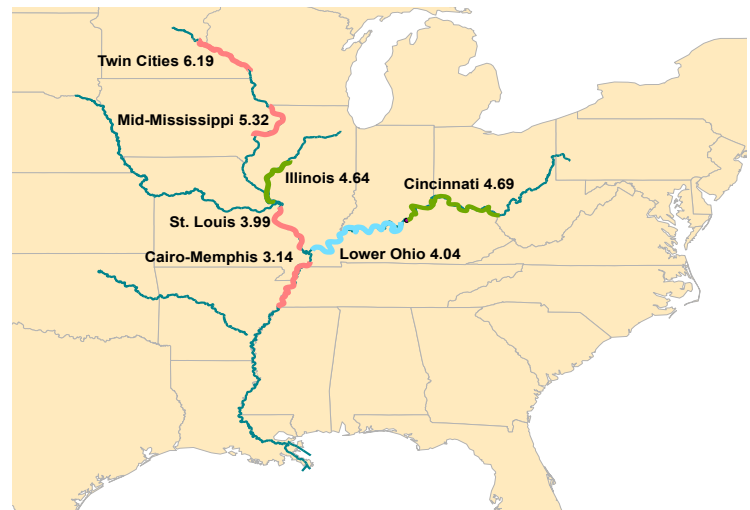
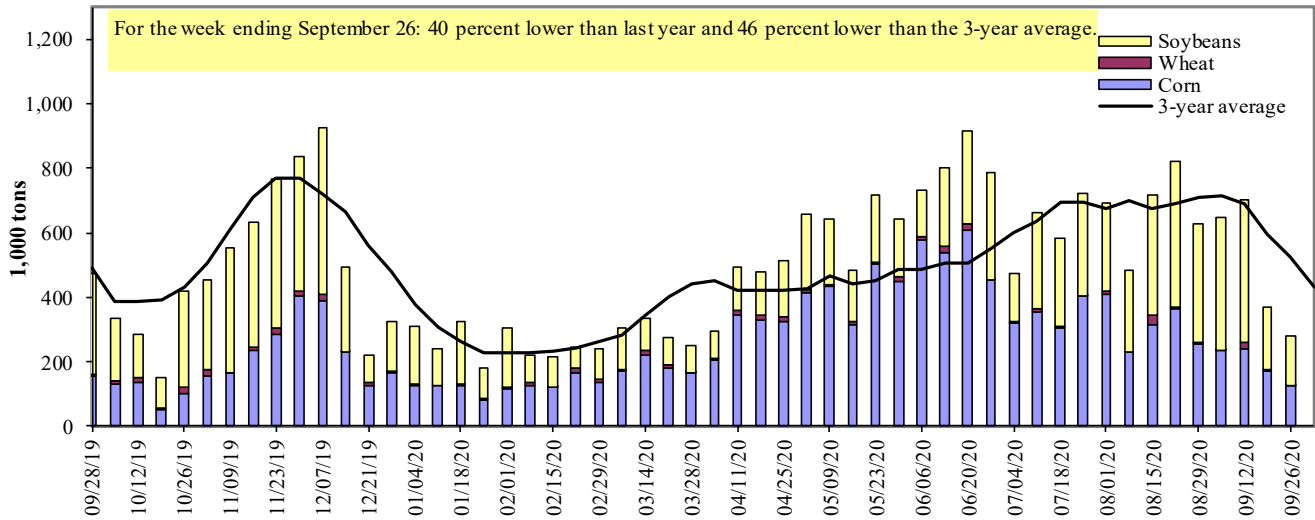


Figure 10

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 09/26/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	87	5	144	0	235
Winfield, MO (L25)	119	3	194	3	320
Alton, IL (L26)	126	2	162	3	293
Granite City, IL (L27)	126	2	153	3	284
Illinois River (La Grange)	0	0	0	0	0
Ohio River (Olmsted)	88	0	122	2	212
Arkansas River (L1)	0	6	8	0	14
Weekly total - 2020	214	7	284	5	510
Weekly total - 2019	204	13	348	0	565
2020 YTD ¹	13,715	1,493	10,913	121	26,243
2019 YTD ¹	9,354	1,298	9,304	131	20,086
2020 as % of 2019 YTD	147	115	117	93	131
Last 4 weeks as % of 2019 ²	144	113	111	123	121
Total 2019	12,780	1,631	14,683	154	29,247

¹ Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

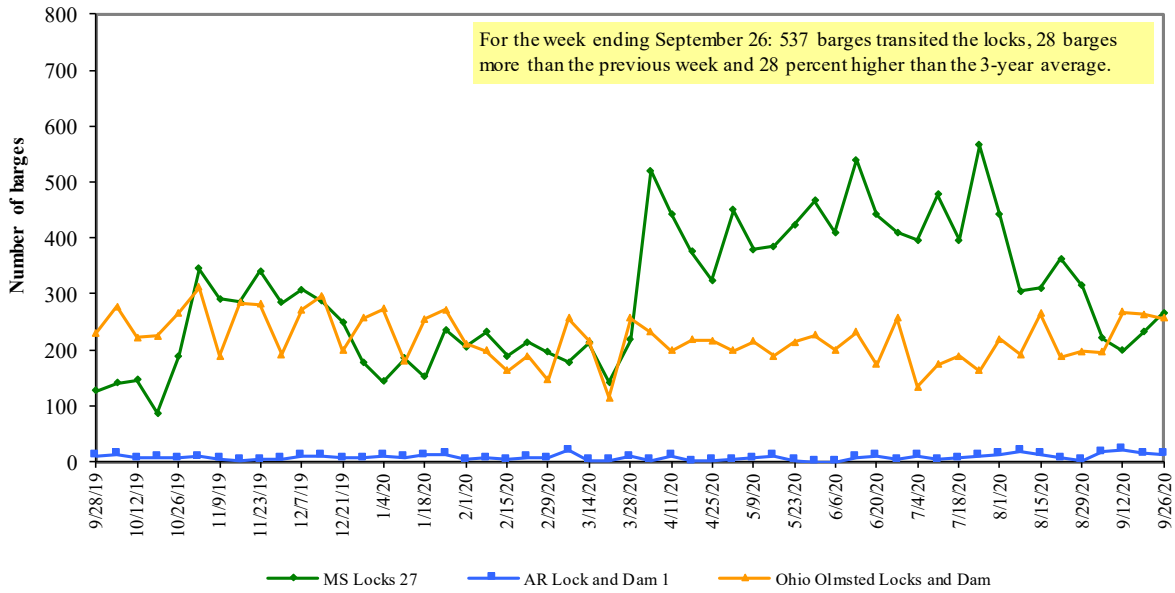
² As a percent of same period in 2019.

Note: Total may not add exactly because of rounding. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

Source: U.S. Army Corps of Engineers.

Figure 11

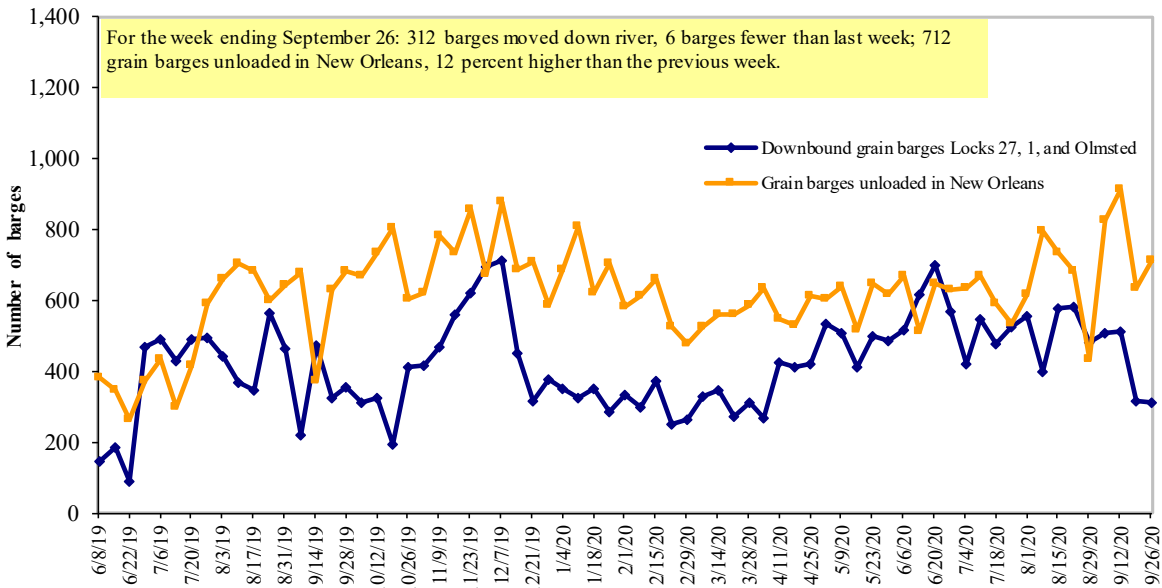
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

Figure 12

Grain barges for export in New Orleans region



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 9/28/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.473	-0.013	-0.592
	New England	2.592	-0.009	-0.464
	Central Atlantic	2.658	-0.004	-0.580
	Lower Atlantic	2.323	-0.020	-0.625
II	Midwest	2.269	-0.013	-0.718
III	Gulf Coast	2.154	-0.003	-0.673
IV	Rocky Mountain	2.336	-0.012	-0.696
	West Coast	2.928	-0.013	-0.717
V	West Coast less California	2.554	-0.003	-0.674
	California	3.236	-0.021	-0.740
Total	United States	2.394	-0.010	-0.672

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

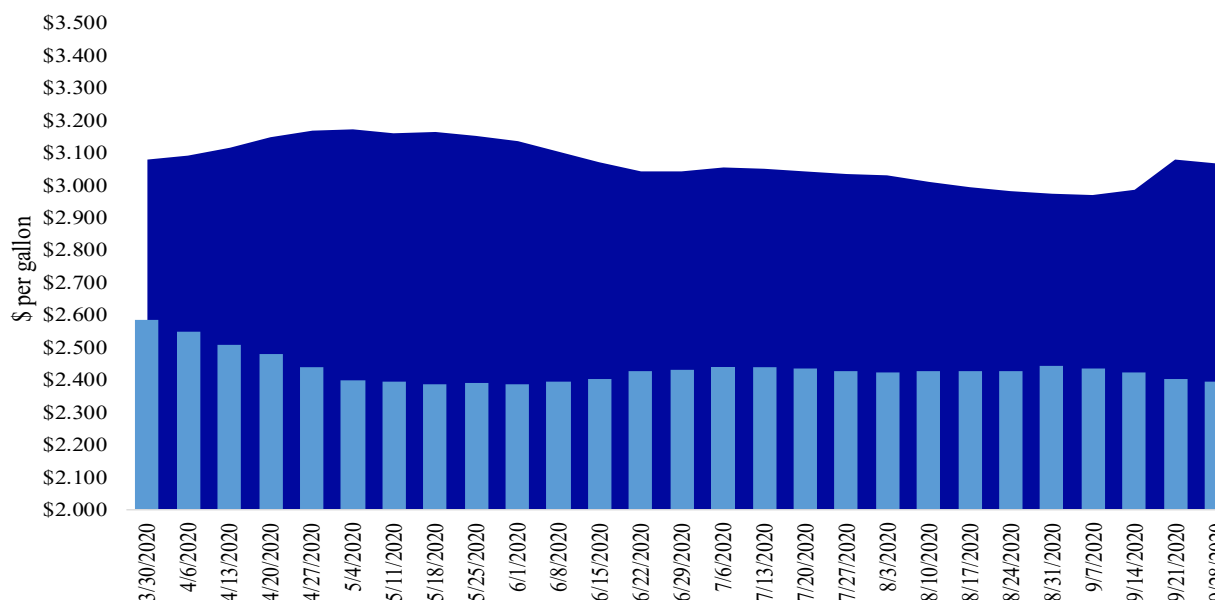
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending September 28, the U.S. average diesel fuel price decreased 1.0 cent from the previous week to \$2.394 per gallon, 67.2 cents below the same week last year.

■ Last year \$3.066
■ Current year \$2.394



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									
9/17/2020	1,637	419	1,733	1,297	257	5,342	20,602	31,996	57,941
This week year ago	1,323	645	1,522	935	281	4,705	8,000	10,146	22,852
Cumulative exports-marketing year²									
2020/21 YTD	3,372	706	2,216	1,571	278	8,142	1,993	3,542	13,676
2019/20 YTD	3,431	954	1,904	1,355	227	7,871	1,149	2,003	11,022
YTD 2020/21 as % of 2019/20	98	74	116	116	122	103	174	177	124
Last 4 wks. as % of same period 2019/20*	133	79	121	132	91	119	189	234	195
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; new 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 09/17/2020	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	3,905	4,975	(22)	14,869
Japan	2,542	1,170	117	11,221
Columbia	806	258	213	4,830
Korea	341	70	389	4,011
China	9,807	60	-	909
Top 5 importers	17,401	6,532	166	35,840
Total U.S. corn export sales	22,595	9,149	147	49,983
% of projected exports	38%	20%		
Change from prior week ²	2,139	494		
Top 5 importers' share of U.S. corn export sales	77%	71%		72%
USDA forecast September 2020	59,160	44,911	32	
Corn use for ethanol USDA forecast, September 2020	129,540	123,317	5	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; 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 (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 9/17/2020	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	19,241	2,055	836	19,106
Mexico	1,732	2,142	(19)	4,591
Egypt	444	523	(15)	2,980
Indonesia	529	327	62	2,360
Japan	592	596	(1)	2,288
Top 5 importers	22,537	5,642	299	31,324
Total U.S. soybean export sales	35,538	12,149	193	49,352
% of projected exports	61%	27%		
change from prior week ²	3,195	1,728		
Top 5 importers' share of U.S. soybean export sales	63%	46%		63%
USDA forecast, September 2020	57,902	45,777	126	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; 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 9/17/2020	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	1,392	1,908	(27)	3,213
Philippines	1,987	1,489	33	2,888
Japan	1,297	1,260	3	2,655
Nigeria	639	775	(18)	1,433
Korea	792	745	6	1,372
Indonesia	550	383	44	1,195
Taiwan	582	559	4	1,175
Thailand	321	375	(14)	727
Italy	458	382	20	622
Colombia	194	408	(52)	618
Top 10 importers	8,211	8,284	(1)	15,897
Total U.S. wheat export sales	13,484	12,576	7	23,821
% of projected exports	51%	48%		
change from prior week ²	351	283		
Top 10 importers' share of U.S. wheat export sales	61%	66%		67%
USDA forecast, September 2020	26,567	26,294	1	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; 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 09/24/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of:		2019 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	362	297	122	12,271	10,233	120	142	146	13,961
Corn	243	264	92	8,160	6,918	118	n/a	186	7,047
Soybeans	348	213	163	4,362	7,594	57	209	270	11,969
Total	953	774	123	24,793	24,745	100	214	184	32,977
Mississippi Gulf									
Wheat	105	81	130	2,995	3,763	80	139	161	4,448
Corn	359	320	112	21,220	16,726	127	170	99	20,763
Soybeans	744	928	80	19,047	19,538	97	148	144	31,398
Total	1,208	1,329	91	43,262	40,027	108	153	129	56,609
Texas Gulf									
Wheat	72	100	72	3,352	5,177	65	100	122	6,009
Corn	0	61	0	600	563	106	192	142	640
Soybeans	0	86	0	399	2	n/a	n/a	n/a	2
Total	72	248	29	4,350	5,742	76	166	192	6,650
Interior									
Wheat	44	28	154	1,646	1,467	112	97	91	1,987
Corn	190	107	178	6,341	5,729	111	112	87	7,857
Soybeans	144	96	151	4,709	5,124	92	85	106	7,043
Total	378	231	164	12,697	12,321	103	99	93	16,887
Great Lakes									
Wheat	10	22	45	628	811	77	105	115	1,339
Corn	0	0	n/a	54	0	n/a	n/a	153	11
Soybeans	29	73	40	385	473	81	286	191	493
Total	39	95	41	1,066	1,284	83	169	145	1,844
Atlantic									
Wheat	0	0	n/a	26	37	72	88	100	37
Corn	0	0	n/a	15	96	16	364	45	99
Soybeans	10	57	17	565	990	57	948	193	1,353
Total	10	58	18	607	1,123	54	686	149	1,489
U.S. total from ports*									
Wheat	593	530	112	20,918	21,488	97	128	138	27,781
Corn	793	752	105	36,389	30,033	121	201	111	36,417
Soybeans	1,275	1,452	88	29,468	33,720	87	158	162	52,258
Total	2,661	2,734	97	86,775	85,242	102	159	139	116,457

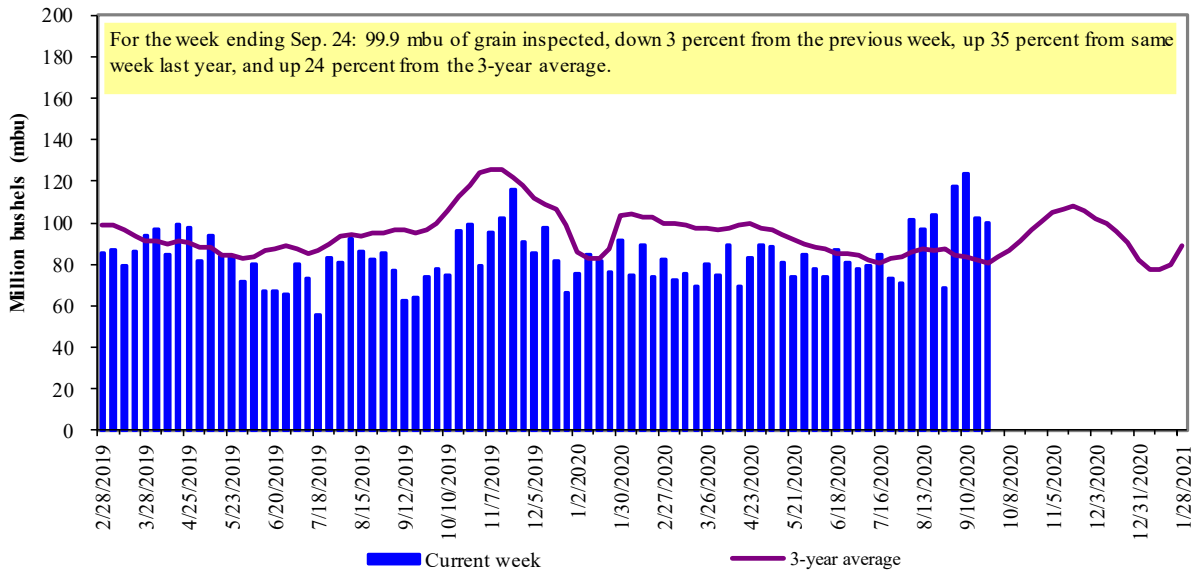
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

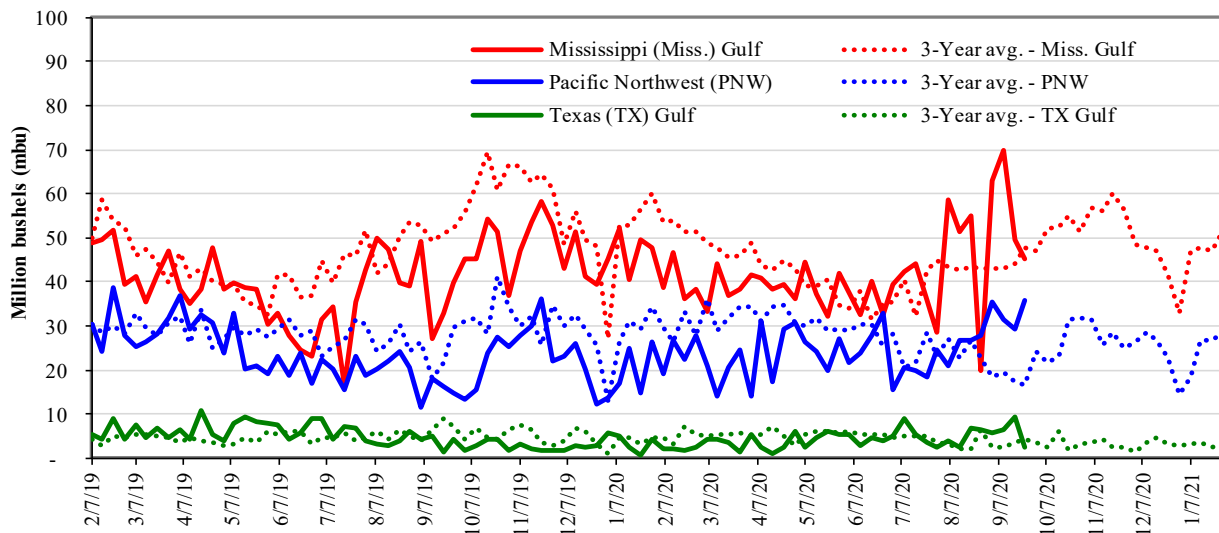


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 09/24/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 45.3	Last wk:	down 9	down 71	down 19	up 22
PNW: 35.7	Last Year (same wk):	up 14	down 38	up 9	up 142
TX Gulf: 2.6	3-yr avg.(4-wk. mov. Avg):	up 2	down 16	unchanged	up 99

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

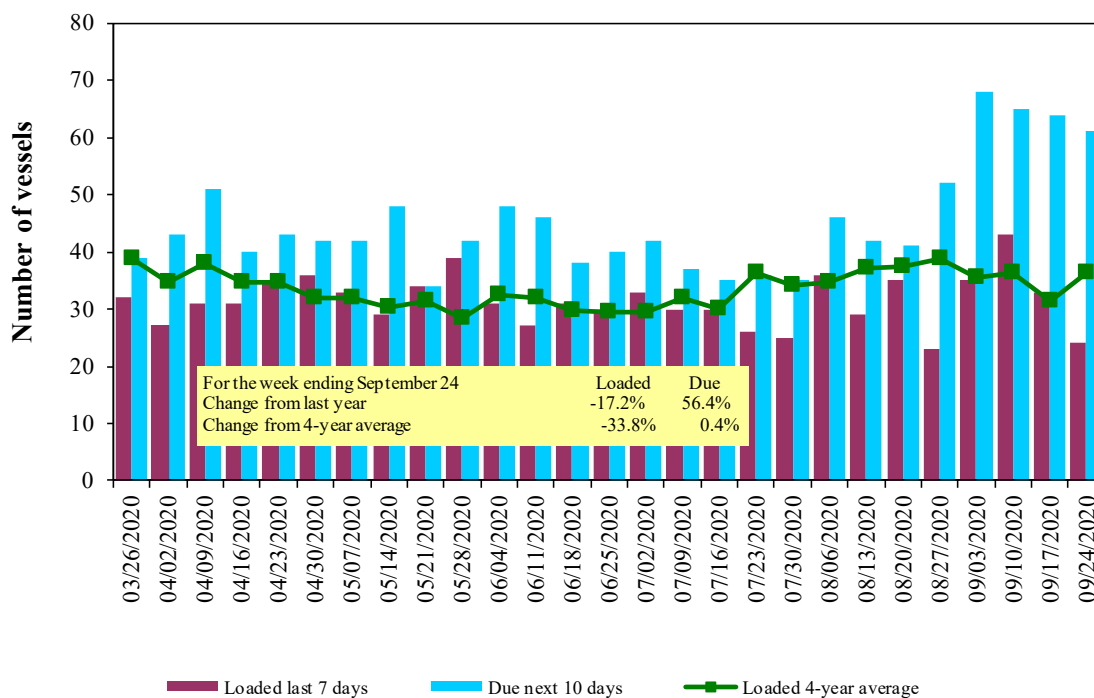
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
9/24/2020	60	24	61	16
9/17/2020	39	33	64	20
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

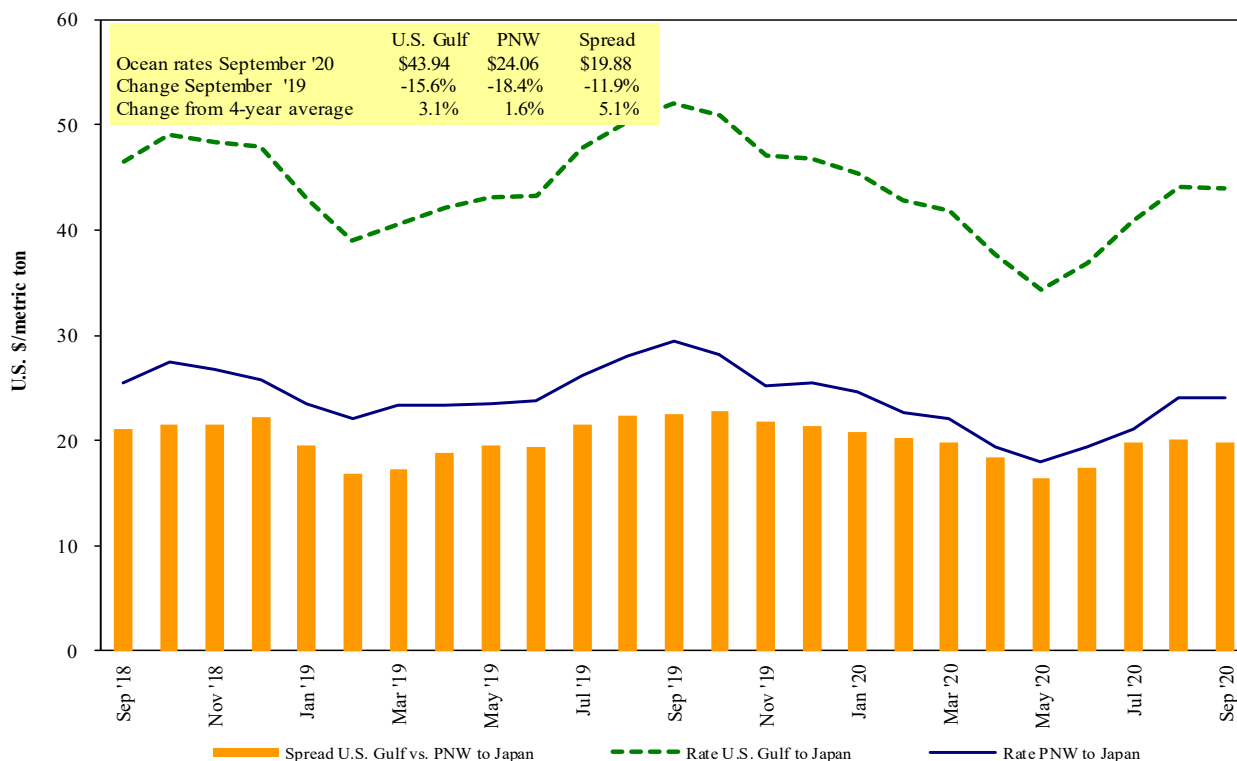
U.S. Gulf¹ vessel loading activity



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 09/26/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Oct 16/25	66,000	41.75
U.S. Gulf	China	Heavy grain	Aug 18/24	66,000	39.50
U.S. Gulf	Djibouti	Wheat	Oct 16/26	12,180	94.48*
U.S. Gulf	Djibouti	Wheat	Sep 18/28	15,810	54.86*
U.S. Gulf	Cameroon	Sorghum	Oct 10/20	8,580	68.50*
U.S. Gulf	Mozambique	Sorghum	Aug 10/20	30,780	41.35
U.S. Gulf	Pt Sudan	Sorghum	Jun 5/15	33,370	99.50
PNW	China	Soybeans	Sep 1/30	63,000	22.10 op 22.60
PNW	Indonesia	Soybean Meal	Nov 10/20	8,600	37.86*
PNW	Yemen	Wheat	Aug 4/14	15,000	42.95*
Vancouver	Japan	Wheat	Sep 15/30	20,000	24.30
Vancouver	Japan	Canola	Sep 15/30	30,000	24.30
Brazil	Japan	Corn	Sep 11/20	49,000	34.75
Brazil	Japan	Corn	Sep 1/10	60,000	34.00

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

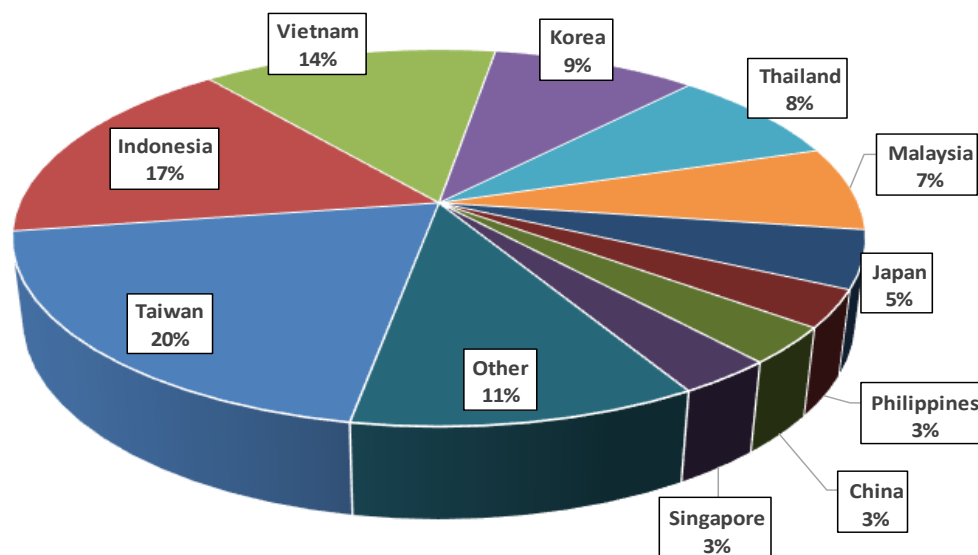
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

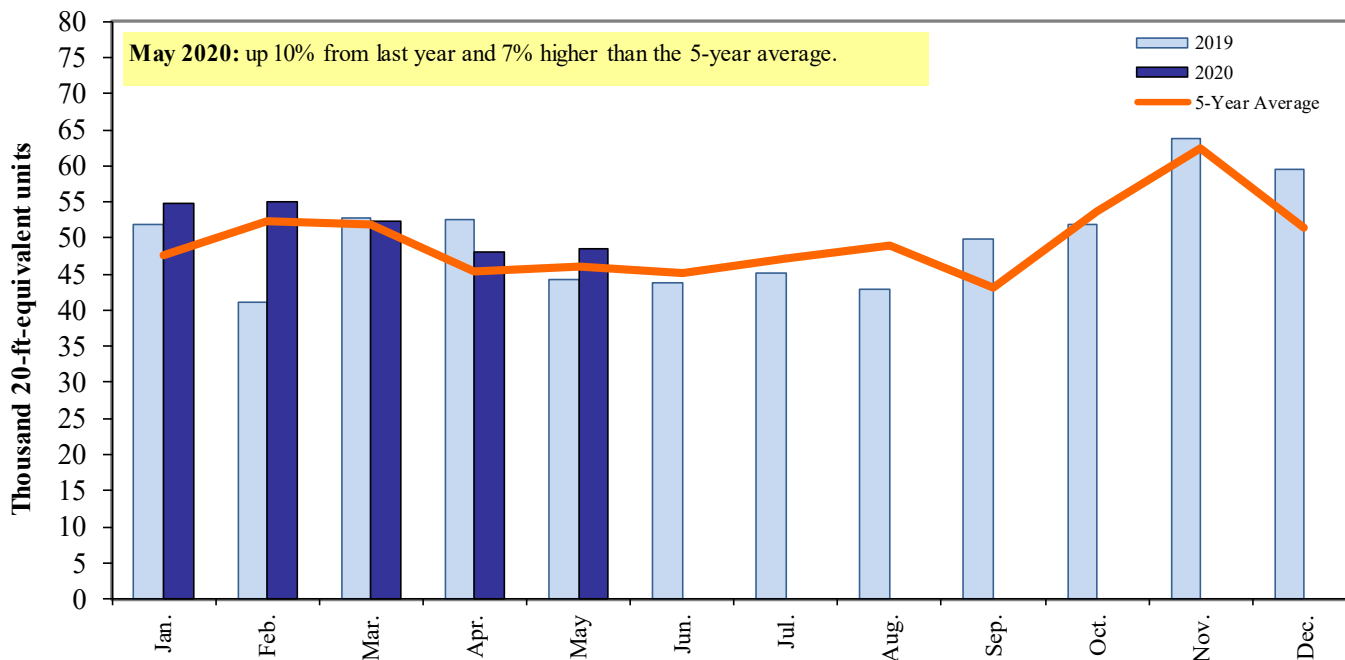
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020



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.

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Grain Exports

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