



Grain Transportation Report

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



October 7, 2021

WEEKLY HIGHLIGHTS

USDA Provides \$500 Million in Relief for Agricultural Marketing/Distribution/Transportation Challenges

On September 29, [USDA announced](#) \$3 billion in investments targeting “urgent challenges facing agriculture today,” as part of Secretary Vilsack’s work as co-chair of the President’s Supply Chain Disruptions Task Force. Of the \$3 billion total, \$500 million will be made available via the Commodity Credit Corporation to provide relief from increased transportation challenges, scarcity and rising costs of certain materials, and other near-term obstacles related to the marketing and distribution of certain commodities.

International Trade Organizations Call on World Leaders To Help “Secure Global Supply Chains”

On September 29, [an open letter from global trade organizations](#) urged world leaders to work together “to remove restrictions hampering the free movement of transport workers, and guarantee and facilitate their free and safe movement.” These organizations assert such actions are urgently needed to secure global supply chains. Specifically, the letter proposes prioritizing transport workers to receive World Health Organization-recognized vaccines, as well as implementing “globally harmonised, digital, mutually recognised vaccination certificate and processes for demonstrating health credentials (including vaccination status and COVID-19 test results).” The collective industries represented by the organizations behind the letter account for more than \$20 trillion of world trade annually (according to the letter). The industries include 65 million global transport workers, over 3.5 million road freight and airline companies, and more than 80 percent of the world merchant shipping fleet.

FHWA Awards Louisiana \$5 Million for Hurricane Ida Relief Efforts

The U.S. Department of Transportation’s Federal Highway Administration (FHWA) recently awarded \$5 million in [“quick release” emergency relief \(ER\) funds](#) to assist the Louisiana Department of Transportation and Development (DOTD) in repairing roads and bridges damaged by Hurricane Ida. FHWA’s ER program provides funding for highways and bridges damaged by natural disasters or catastrophic events. The quick-release ER funds are intended to restore the most essential transportation links—to Federal-aid highways—disrupted by Hurricane Ida. Additional, subsequent ER funds may be available to continue less urgent repairs to roads and bridges. The repairs will stabilize damaged roadway embankments, replace destroyed signage, and repair and rebuild damaged roads and bridges, including removal of bridge scour.

Snapshots by Sector

Export Sales

For the week ending September 23, [unshipped balances](#) of wheat, corn, and soybeans for marketing year 2021/22 totaled 50.9 million metric tons (mmt), down 16 percent from same time last year. Net [corn export sales](#) were 0.370 mmt, down 1 percent from last week. Net [soybean export sales](#) were 1.094 mmt, up 21 percent from last week. Net weekly [wheat export sales](#) were 0.290 mmt, down 19 percent from last week.

Rail

U.S. Class I railroads originated 21,864 [grain carloads](#) during the week ending September 25. This was a 13-percent increase from the previous week, 13 percent less than last year, and 1 percent lower than the 3-year average.

Average October shuttle [secondary railcar](#) bids/offers (per car) were \$270 above tariff for the week ending September 30. This is \$538 less than last week and \$711 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending October 2, [barged grain movements](#) totaled 492,522 tons. This was 163 percent higher than the previous week and 3 percent lower than the same period last year.

For the week ending October 2, 295 grain barges [moved down river](#)—183 barges more than the previous week. There were 637 grain barges unloaded in New Orleans Region, 63 percent more than last week.

Ocean

For the week ending September 30, 26 [oceangoing grain vessels](#) were loaded in the Gulf—40 percent fewer than the same period last year. Within the next 10 days (starting October 1), 53 vessels were expected to be loaded—4 percent fewer than the same period last year.

As of September 30, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$84.25. This was 2 percent more than the previous week. The rate from the Pacific Northwest to Japan was \$46.50 per mt, 2 percent more than the previous week.

Fuel

For the week ending October 4, the U.S. average [diesel fuel price](#) increased by 7.1 cents from the previous week to \$3.477 per gallon, \$1.090 above the same week last year. At \$3.43 per gallon, Midwest diesel prices are the highest since December 2014.

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U.S.-to-Mexico Corn-Export Shares by Transportation Mode

From an agricultural trade perspective, Mexico and the United States have a longstanding mutually beneficial relationship. Since marketing year (MY) 2016/17, Mexico has consistently been one of the top five importers of U.S. corn. During that time, more than 90 percent of Mexico's corn imports have come from the United States. Over the last 5 years, the modal share of U.S.-to-Mexico corn exports has remained constant. A majority of U.S.-to-Mexico corn export volumes are shipped by rail and ocean vessel. This article describes how Mexico's reliance on U.S. corn affects the modal shares of U.S.-to-Mexico corn exports.

U.S. and Mexican Corn Trades Are Mutually Dependent

Since the North American Free Trade Agreement (NAFTA) took effect in 1994, U.S.-to-Mexico corn exports have flourished from zero tariffs, as well as from the easy access enjoyed by adjacent trade partners.¹ According to data from USDA's Foreign Agricultural Service (FAS), from 1994-2020, Mexico's corn imports rose by 437 percent, with almost all of the increase originating from the United States. Over the last 5 marketing years, Mexico has imported an annual average of 14.9 million metric tons (mmt) of corn, or 31 percent of the country's total corn supply. Of this amount, 92 percent was imported from the United States. According to data from USDA's Federal Grain Inspection Service (FGIS), since 2014, 93 percent of Mexico's corn imports have been the Yellow #2 variety, which is fed to livestock (cattle, hogs, boilers, and layers). The remaining 7 percent is white corn, which is for human consumption.

Mexico is a major, consistent destination for U.S. corn exports. Since MY 2016/17, Mexico has been either the largest importer of U.S. corn, or within the top five importers of U.S. corn. In the September [World Agricultural Supply and Demand Estimates \(WASDE\)](#) report, USDA's World Agricultural Outlook Board (WAOB) estimates Mexico will import a record 17 mmt of corn. Despite its historical status as Mexico's primary source of corn imports, over the last 2 years, the United States has supplied a smaller share of Mexico's corn imports. However, during this time, the United States still supplied Mexico with 88 percent of the country's corn imports. If that U.S. import share stays constant and Mexico imports a record 17 mmt volume of corn during MY 2021/22, then U.S. export volumes of corn to Mexico will likely be strong—below 2017/18 and 2018/19, but above 2019/20. Such a scenario would support all modes of U.S. agricultural transportation.

Mexican Livestock Expansion Increases Demand for U.S. Grain Transportation

The primary driver of Mexico's increased imports of U.S. corn is the expanding commercial domestic livestock sector. According to data from Mexico's Servicio de Información Agroalimentaria y Pesquera (SIAP), since 2016, the commercial poultry flock has expanded by 10 percent; the hog herd, by 13 percent; and the beef/dairy cattle herd, by 6 percent. During this time, expanding Mexican livestock production has required more corn imports, raising demand for U.S. exports and U.S. grain transportation. Mexico's livestock production is geographically dispersed: broilers are raised in the western and southern part of the country; cattle, in the north and south; and hogs, in the south, west, and north. Figure 1 provides an overview of Mexico's total animal distribution by State. Combining data on Mexico's commercial livestock population with data on the major rail and ocean vessel ports of entry can help illustrate the relationship between modal shares for transporting U.S. corn exports.

Modal Shares for U.S.-to-Mexico Corn Exports Remain Consistent

Since MY 2016/17 the modal shares of U.S. corn exports to Mexico have been consistent year to year, with annual percentages hovering close to the five-year averages as follows: rail has transported 56 percent of total U.S. corn export volumes; ocean, 42 percent; and truck, 2 percent. This consistency is reinforced by the predictable patterns of demand for corn imports in the Mexican regions where broilers, cattle, and hogs are produced. These grain-consuming regions help determine U.S. modal shares for moving U.S. corn exports because of their relative proximity to, and thus demand for, rail lines or ocean ports. Other factors that influence those shares include the demand for Mexican transportation and both the concentration and maturation of the commercial Mexican livestock industry, which is clustered near the Port of Veracruz and further explained below.

Rail. Using data from FGIS, over the last 5 years, the United States exported an annual average of 7.8 mmt of corn to Mexico by rail, or 56 percent of the total volume. In descending order by volume, State origins of corn exports by rail are as follows: Iowa, (25 percent), Nebraska (23 percent), Illinois (20 percent), Kansas (15 percent), and Missouri (13 percent). Collectively, these amount to 96 percent of U.S.-to-Mexico corn exports by rail. While export shares illustrate some natural

¹ On July 1, 2020, the United States–Mexico–Canada Agreement (USMCA) replaced NAFTA.

variability by State origin, this breakdown, too, has been consistent: over the last 5 years, these percentages have remained in a tight range.

Whether the rail cars enter Mexico from the United States through the ports of entry in Texas, Arizona, or California, rail lines owned and operated by Kansas City Southern de México (KCSM) and Ferromex deliver corn to key livestock-producing States (fig. 1) in the north, central, and central western portions of Mexico.

Figure 1: U.S.-Mexico Railroads and Grain-Consuming Animal Units (GCAU) by Municipality, 2020.



Ocean. According to FGIS data over the last 5 marketing years, ocean vessels shipped an annual average of 5.9 mmt of corn to Mexico, which represented 42 percent of the total annual export volume. Of this volume, 92 percent of the corn originates at ports on the Mississippi River in Louisiana, while 8 percent originates from Texas ports on the U.S. Gulf. Figure 1 illustrates how U.S. corn exports by ocean vessel to the Port of Veracruz are supported by the regional concentration of commercial livestock. Based on data from SCIPA, the States of Veracruz, Chiapas, and Oaxaca represent 22 percent of Mexico’s

Source: Livestock data - El Servicio de Información Agroalimentaria y Pesquera, Gobierno de México; GCAU Factors - USDA; Rail network - Bureau of Transportation Statistics, Department of Transportation.

cattle, hog, and broiler numbers. According to the USDA’s Economic Research Service (ERS), the [Port of Veracruz](#) is the most important Mexican port for U.S. agricultural exports. With its strategic access to the KCSM and the Ferrosur rail lines, the port helps ensure the relative consistency of U.S.-to-Mexico corn-export shares by ocean vessel. The port also offers highway access to move corn to feeding operations in the States of Veracruz, Chiapas, and Oaxaca (fig. 1), and helps fulfill the demand for corn exported by ocean vessel.

Conclusion

As the annual total corn consumption and imports continue to rise in Mexico, the United States continues to be its dominant supplier, and Mexico remains a critical destination for U.S. Yellow #2 corn exports. The geographic locations, concentrations, and maturation stages of Mexico’s livestock population largely influence the demand for U.S. agricultural transportation and help explain U.S. modal shares of corn exports.

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Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Non-Shuttle	Shuttle		Gulf	Pacific
10/06/21	233	297	241	384	377	330
09/29/21	229	291	255	433	369	323

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

Source: USDA, Agricultural Marketing Service.

Table 2

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

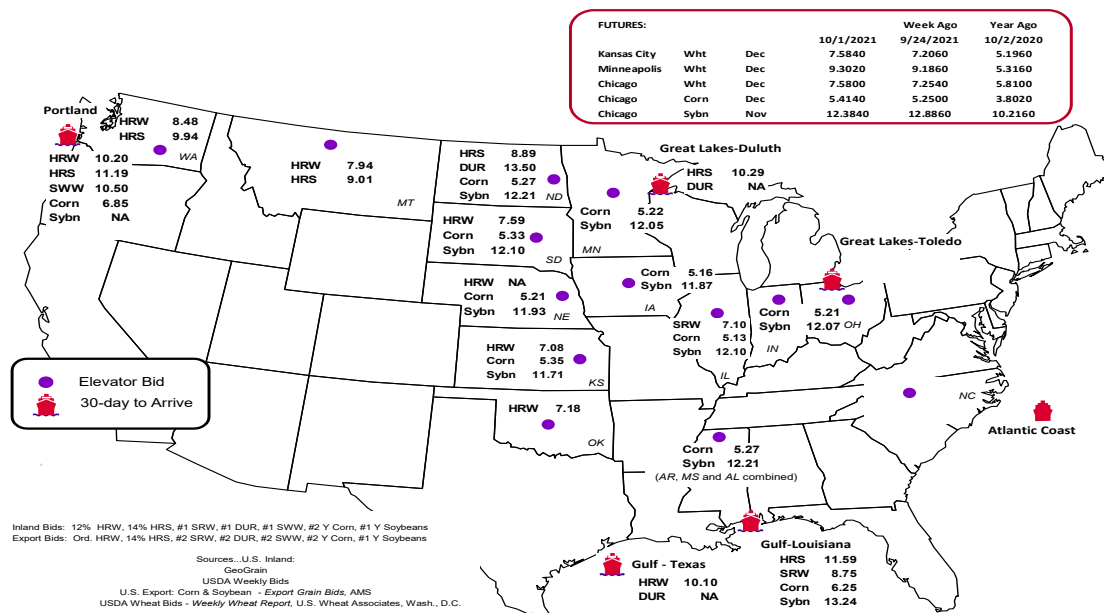
Commodity	Origin-destination	10/1/2021	9/24/2021
Corn	IL-Gulf	-1.12	-1.07
Corn	NE-Gulf	-1.04	-1.02
Soybean	IA-Gulf	-1.37	-1.25
HRW	KS-Gulf	-3.02	-3.12
HRS	ND-Portland	-2.30	-2.36

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			
9/29/2021 ^P	206	2,003	3,909	410	6,528	9/25/2021	2,949
9/22/2021 ^r	0	330	3,319	227	3,876	9/18/2021	3,092
2021 YTD ^r	37,301	49,445	202,371	11,043	300,160	2021 YTD	108,784
2020 YTD ^r	20,209	36,354	186,376	9,445	252,384	2020 YTD	96,002
2021 YTD as % of 2020 YTD	185	136	109	117	119	% change YTD	113
Last 4 weeks as % of 2020 ²	11	74	53	38	50	Last 4wks. % 2020	121
Last 4 weeks as % of 4-year avg. ²	19	94	76	62	72	Last 4wks. % 4 yr.	110
Total 2020	45,294	64,116	299,882	24,458	433,750	Total 2020	126,407
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622

¹Data is incomplete as it is voluntarily provided.

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

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

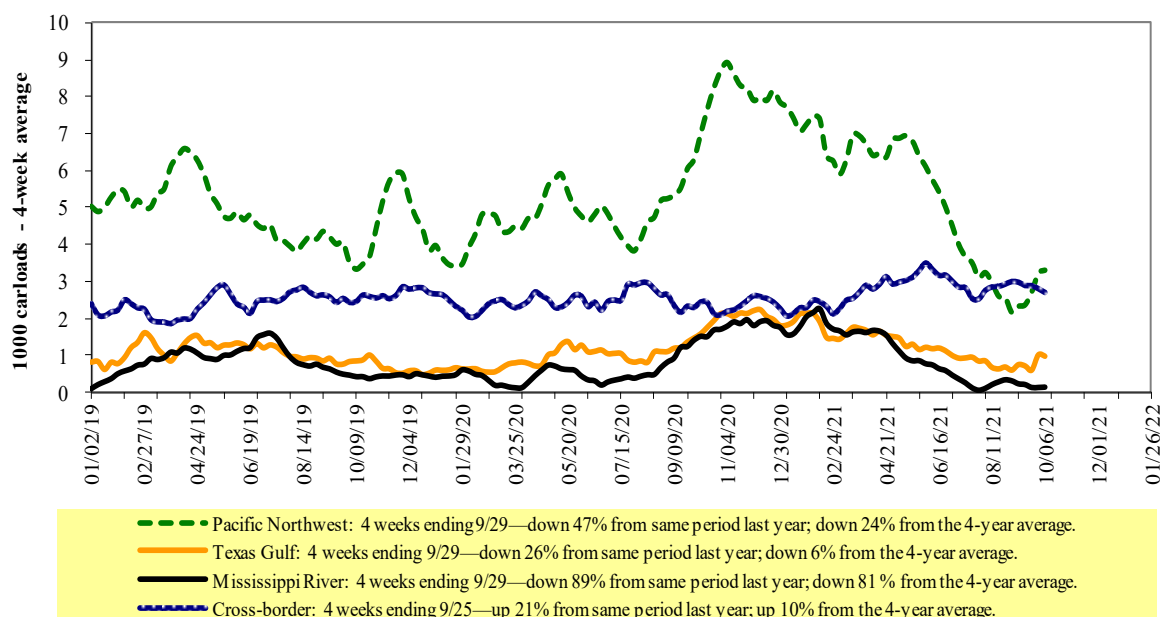
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

Source: USDA, Agricultural Marketing Service.

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

Figure 2

Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

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

For the week ending: 9/25/2021	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,393	1,744	10,610	1,315	6,802	21,864	4,144	4,022
This week last year	1,582	1,822	13,936	1,428	6,224	24,992	4,266	5,402
2021 YTD	66,711	90,685	433,911	44,218	231,297	866,822	154,421	179,822
2020 YTD	63,305	90,861	424,076	41,163	201,932	821,337	159,963	179,955
2021 YTD as % of 2020 YTD	105	100	102	107	115	106	97	100
Last 4 weeks as % of 2020*	82	75	75	118	91	82	80	73
Last 4 weeks as % of 3-yr. avg.**	80	67	84	132	103	89	87	79
Total 2020	91,659	129,720	613,630	57,782	296,701	1,189,492	238,216	261,778

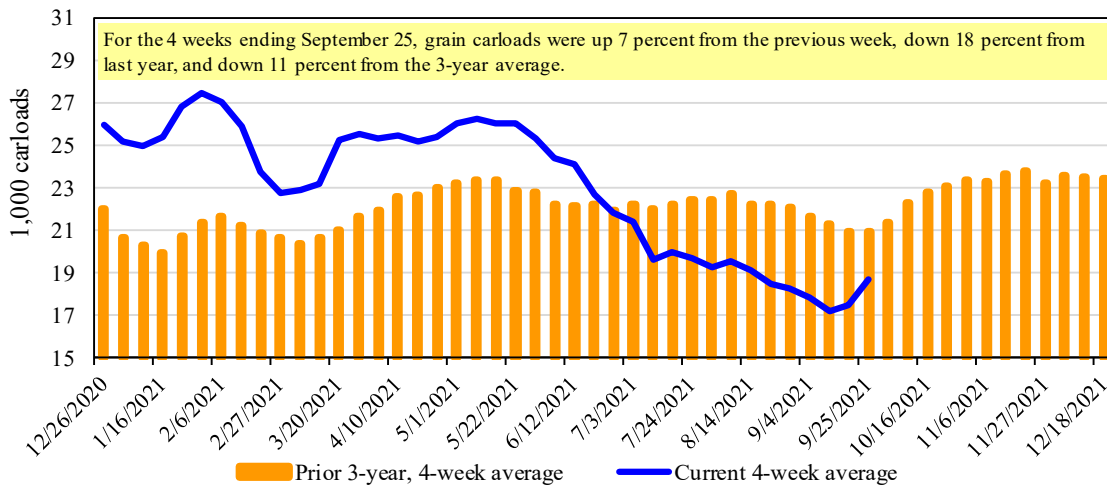
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

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

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

Source: Association of American Railroads.

Figure 3

Total weekly U.S. Class I railroad grain carloads

Source: Association of American Railroads.

Table 5

Railcar auction offerings¹ (\$/car)²

For the week ending: 9/30/2021		Delivery period							
		Oct-21	Oct-20	Nov-21	Nov-20	Dec-21	Dec-20	Jan-22	Jan-21
BNSF ³	COT grain units	0	no offer	0	207	no bids	92	no bids	0
	COT grain single-car	1	no offer	0	135	0	205	0	144
UP ⁴	GCAS/Region 1	n/a	no offer	n/a	no offer	n/a	no offer	n/a	n/a
	GCAS/Region 2	n/a	no offer	n/a	no offer	n/a	no offer	n/a	n/a

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

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

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

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

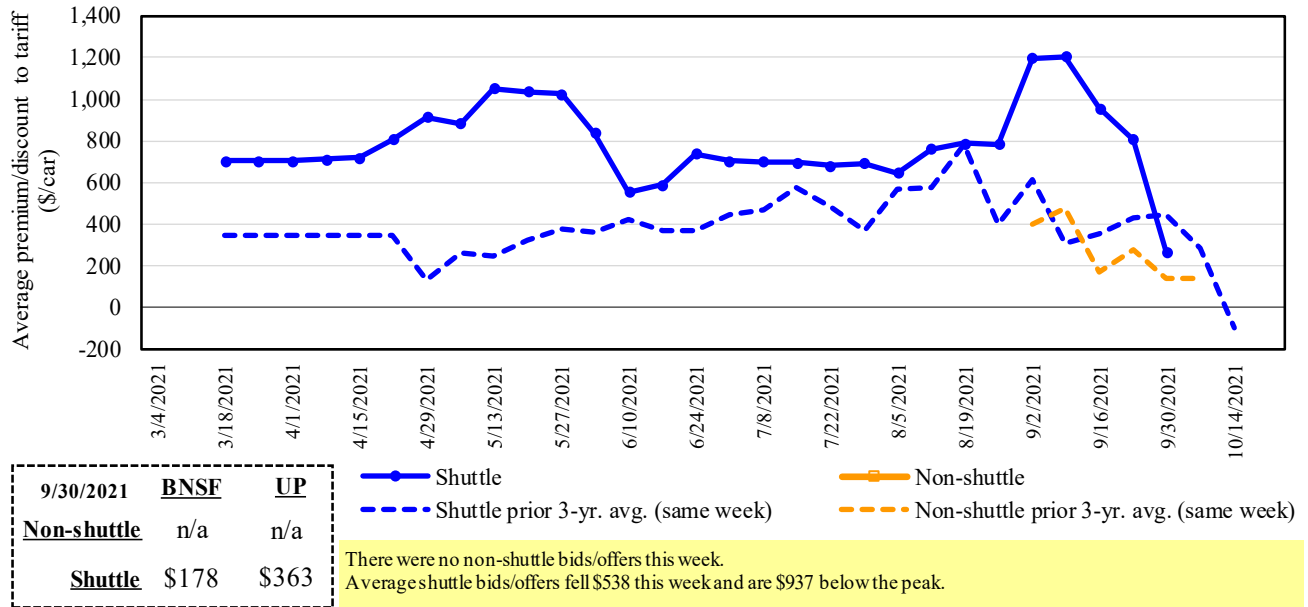
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

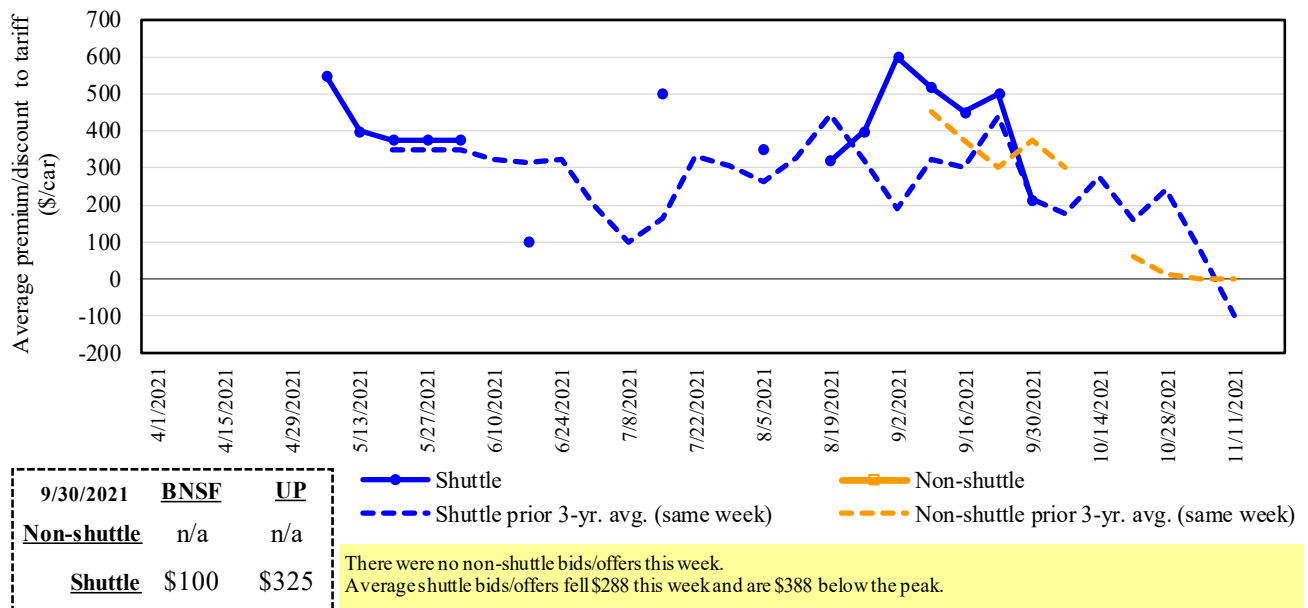
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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



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

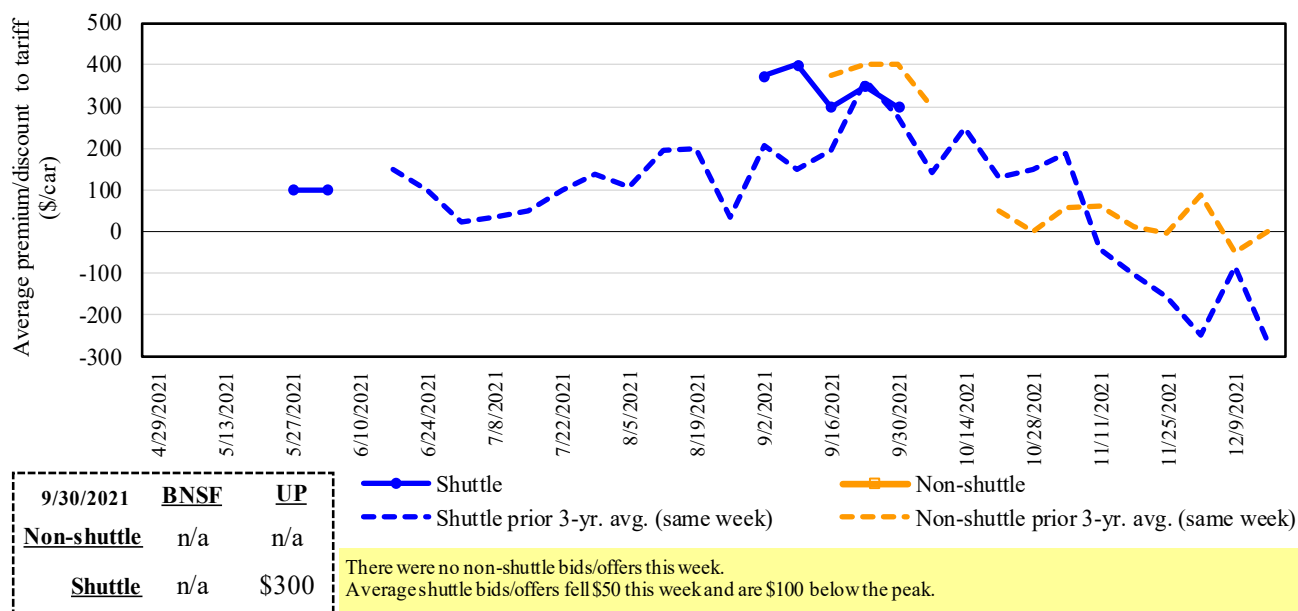
Figure 5
Bids/offers for railcars to be delivered in November 2021, secondary market



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

Figure 6

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



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

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending:		Delivery period						
		9/30/2021		Oct-21	Nov-21	Dec-21	Jan-22	Feb-22
Non-shuttle	BNSF-GF	n/a	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	n/a
	Change from same week 2020	n/a	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	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	178	100	n/a	n/a	n/a	n/a	n/a
	Change from last week	(441)	(400)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	(835)	(450)	n/a	n/a	n/a	n/a	n/a
	UP-Pool	363	325	300	n/a	n/a	n/a	n/a
	Change from last week	(635)	(175)	(50)	n/a	n/a	n/a	n/a
	Change from same week 2020	(588)	(375)	(200)	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 2021	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴	
					metric ton	bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,695	\$132	\$38.00	\$1.03	3	
	Grand Forks, ND	Duluth-Superior, MN	\$3,658	\$0	\$36.33	\$0.99	-13	
	Wichita, KS	Los Angeles, CA	\$7,290	\$0	\$72.39	\$1.97	2	
	Wichita, KS	New Orleans, LA	\$4,525	\$231	\$47.23	\$1.29	4	
	Sioux Falls, SD	Galveston-Houston, TX	\$7,026	\$0	\$69.77	\$1.90	3	
	Colby, KS	Galveston-Houston, TX	\$4,801	\$254	\$50.19	\$1.37	4	
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$353	\$54.36	\$1.48	5	
	Champaign-Urbana, IL	New Orleans, LA	\$4,000	\$262	\$42.32	\$1.07	7	
	Toledo, OH	Raleigh, NC	\$8,130	\$0	\$80.73	\$2.05	4	
	Des Moines, IA	Davenport, IA	\$2,505	\$55	\$25.43	\$0.65	4	
	Indianapolis, IN	Atlanta, GA	\$6,227	\$0	\$61.84	\$1.57	4	
	Indianapolis, IN	Knoxville, TN	\$5,247	\$0	\$52.11	\$1.32	4	
Soybeans	Des Moines, IA	Little Rock, AR	\$4,000	\$163	\$41.34	\$1.05	6	
	Des Moines, IA	Los Angeles, CA	\$5,880	\$474	\$63.10	\$1.60	8	
	Minneapolis, MN	New Orleans, LA	\$3,631	\$280	\$38.84	\$1.06	7	
	Toledo, OH	Huntsville, AL	\$6,714	\$0	\$66.67	\$1.81	2	
	Indianapolis, IN	Raleigh, NC	\$7,422	\$0	\$73.70	\$2.01	4	
	Indianapolis, IN	Huntsville, AL	\$5,367	\$0	\$53.30	\$1.45	2	
Shuttle train	Champaign-Urbana, IL	New Orleans, LA	\$4,745	\$262	\$49.72	\$1.35	6	
	Wheat	Great Falls, MT	Portland, OR	\$4,193	\$0	\$41.64	\$1.13	4
	Wichita, KS	Galveston-Houston, TX	\$4,411	\$0	\$43.80	\$1.19	4	
	Chicago, IL	Albany, NY	\$6,670	\$0	\$66.24	\$1.80	5	
	Grand Forks, ND	Portland, OR	\$5,851	\$0	\$58.10	\$1.58	3	
	Grand Forks, ND	Galveston-Houston, TX	\$5,721	\$0	\$56.81	\$1.55	-5	
	Colby, KS	Portland, OR	\$6,012	\$416	\$63.83	\$1.74	5	
	Corn	Minneapolis, MN	Portland, OR	\$5,380	\$0	\$53.43	\$1.36	4
		Sioux Falls, SD	Tacoma, WA	\$5,340	\$0	\$53.03	\$1.35	4
		Champaign-Urbana, IL	New Orleans, LA	\$3,920	\$262	\$41.52	\$1.05	7
		Lincoln, NE	Galveston-Houston, TX	\$4,080	\$0	\$40.52	\$1.03	5
		Des Moines, IA	Amarillo, TX	\$4,420	\$205	\$45.92	\$1.17	6
		Minneapolis, MN	Tacoma, WA	\$5,380	\$0	\$53.43	\$1.36	4
	Soybeans	Council Bluffs, IA	Stockton, CA	\$5,300	\$0	\$52.63	\$1.34	4
		Sioux Falls, SD	Tacoma, WA	\$6,050	\$0	\$60.08	\$1.64	3
		Minneapolis, MN	Portland, OR	\$6,100	\$0	\$60.58	\$1.65	3
		Fargo, ND	Tacoma, WA	\$5,950	\$0	\$59.09	\$1.61	3
		Council Bluffs, IA	New Orleans, LA	\$4,975	\$302	\$52.40	\$1.43	6
		Toledo, OH	Huntsville, AL	\$4,954	\$0	\$49.20	\$1.34	0
	Grand Island, NE	Portland, OR	\$5,360	\$426	\$57.45	\$1.56	8	

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 2021			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,699	\$0	\$78.67	\$2.14	4
	OK	Cuautitlan, EM	\$6,900	\$181	\$72.35	\$1.97	5
	KS	Guadalajara, JA	\$7,619	\$687	\$84.86	\$2.31	5
	TX	Salinas Victoria, NL	\$4,420	\$110	\$46.29	\$1.26	4
Corn	IA	Guadalajara, JA	\$9,102	\$613	\$99.27	\$2.52	5
	SD	Celaya, GJ	\$8,300	\$0	\$84.81	\$2.15	2
	NE	Queretaro, QA	\$8,322	\$377	\$88.88	\$2.26	4
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahnepantla, EM	\$7,687	\$367	\$82.29	\$2.09	4
	SD	Torreon, CU	\$7,825	\$0	\$79.95	\$2.03	2
Soybeans	MO	Bojay (Tula), HG	\$8,647	\$570	\$94.17	\$2.56	4
	NE	Guadalajara, JA	\$9,207	\$594	\$100.14	\$2.72	3
	IA	El Castillo, JA	\$9,510	\$0	\$97.17	\$2.64	1
	KS	Torreon, CU	\$8,109	\$420	\$87.15	\$2.37	4
Sorghum	NE	Celaya, GJ	\$7,932	\$546	\$86.63	\$2.20	5
	KS	Queretaro, QA	\$8,108	\$226	\$85.15	\$2.16	2
	NE	Salinas Victoria, NL	\$6,713	\$182	\$70.44	\$1.79	2
	NE	Torreon, CU	\$7,157	\$390	\$77.11	\$1.96	4

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

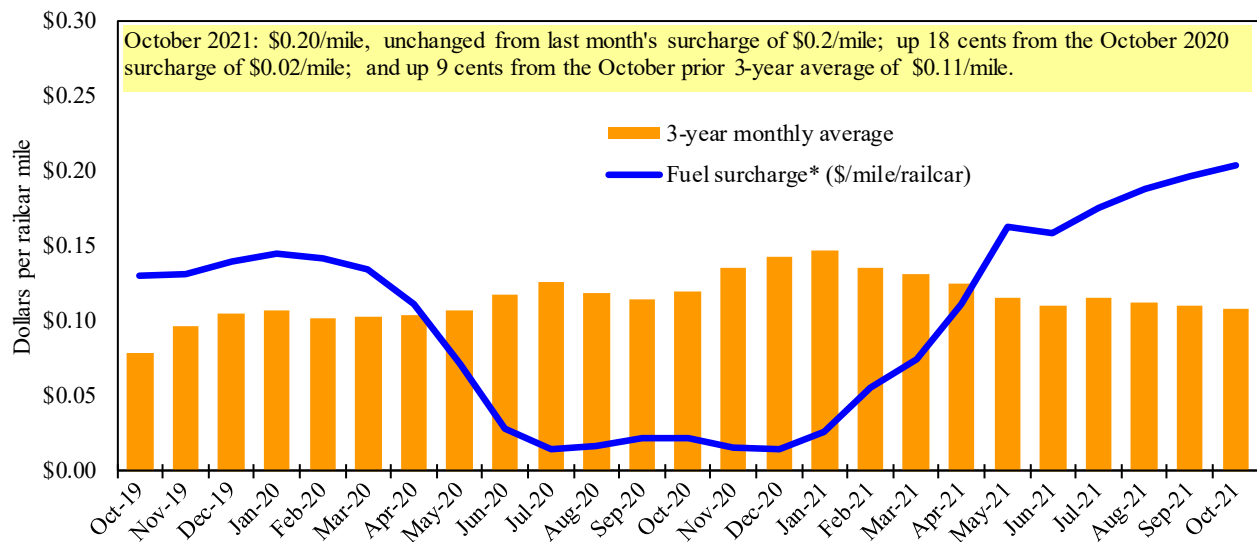
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

⁴Percentage change calculated using tariff rate plus fuel surcharge; Y/Y = year over year.

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

Figure 7

Railroad fuel surcharges, North American weighted average¹

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

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

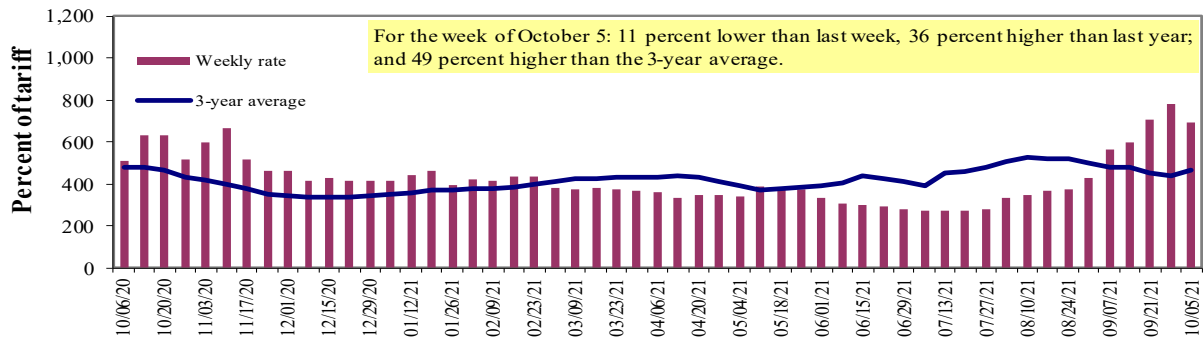
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River barge freight rate^{1,2}



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	10/5/2021	629	717	692	713	708	708	763
	9/28/2021	725	863	779	846	856	856	1000
\$/ton	10/5/2021	38.94	38.14	32.11	28.45	33.21	28.60	23.96
	9/28/2021	44.88	45.91	36.15	33.76	40.15	34.58	31.40
Current week % change from the same week:								
	Last year	21	40	36	66	67	67	90
	3-year avg. ²	38	57	57	86	63	63	102
Rate ¹	November	549	521	495	417	478	478	400
	January	-	-	439	333	362	362	312

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

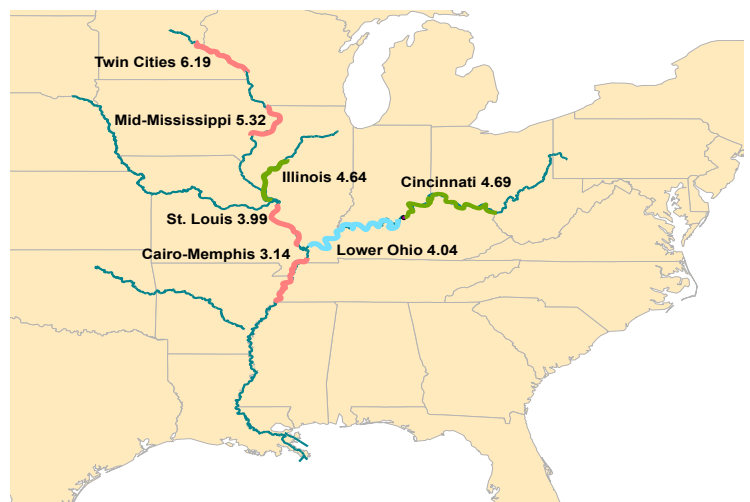
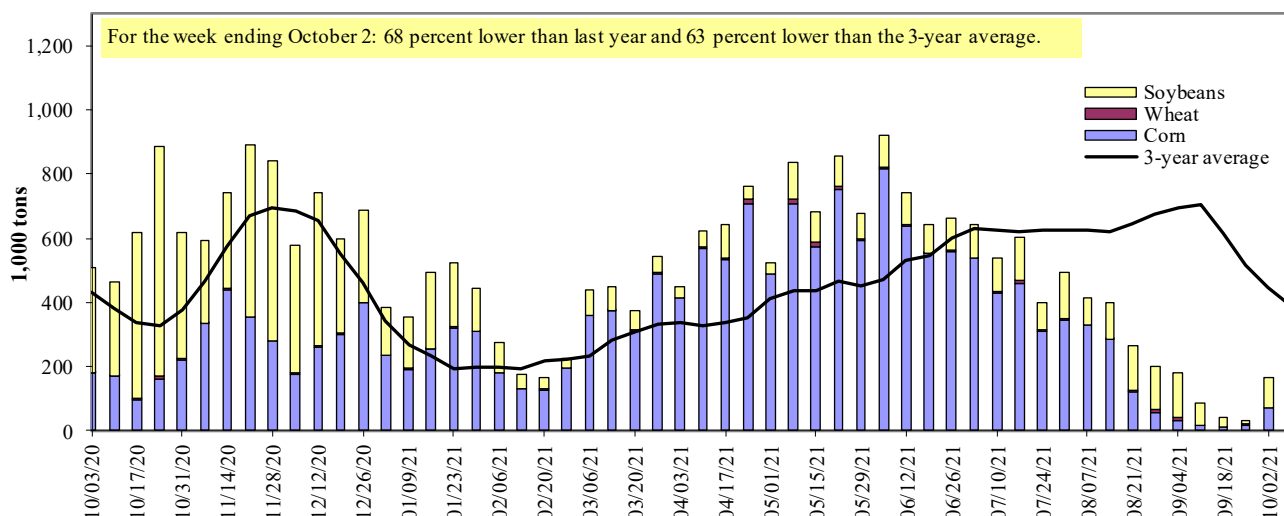


Figure 10

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 10/02/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	3	0	55	0	58
Winfield, MO (L25)	54	0	83	0	137
Alton, IL (L26)	70	0	94	0	164
Granite City, IL (L27)	73	0	91	0	164
Illinois River (La Grange)					
	26	0	11	0	37
Ohio River (Olmsted)					
	226	7	53	0	286
Arkansas River (L1)					
	10	18	15	0	43
Weekly total - 2021					
	308	25	159	0	493
Weekly total - 2020					
	214	7	284	5	510
2021 YTD ¹					
	19,280	1,441	6,242	225	27,187
2020 YTD ¹					
	13,715	1,493	10,913	121	26,243
2021 as % of 2020 YTD					
	141	97	57	185	104
Last 4 weeks as % of 2020 ²					
	48	123	24	154	39
Total 2020					
	18,942	1,765	19,205	237	40,149

¹ Weekly total, YTD (year-to-date), and calendar year total include MI/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye.

Total may not add exactly due to rounding.

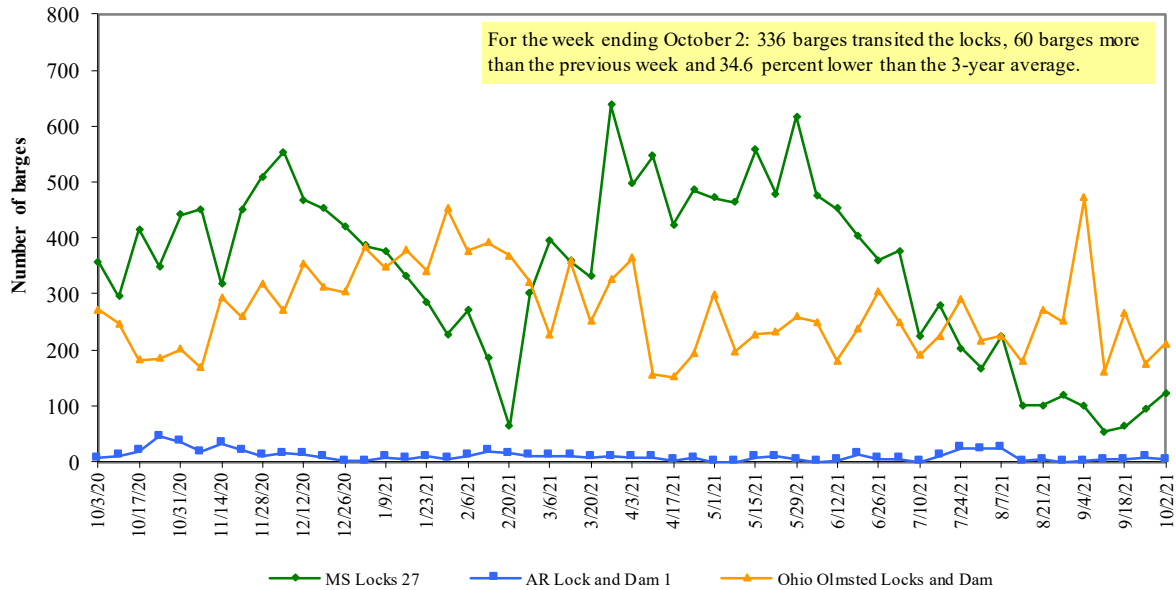
² As a percent of same period in 2020.

Note: L (as in "L15") refers to a lock, locks, or locks and dam facility.

Source: U.S. Army Corps of Engineers.

Figure 11

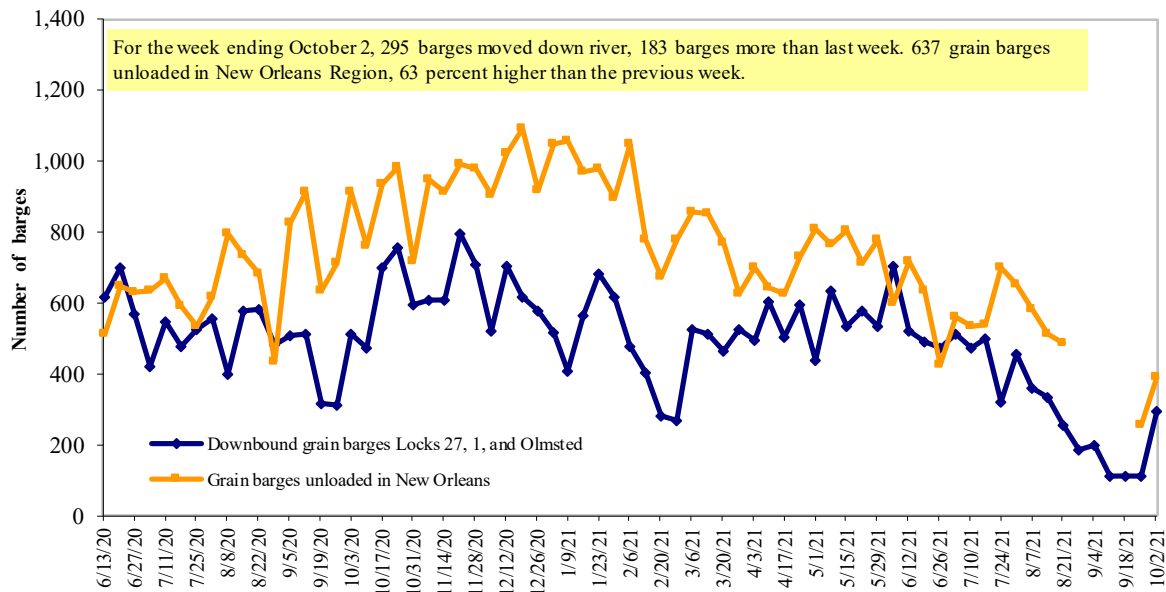
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 10/4/2021 (U.S. \$/gallon)

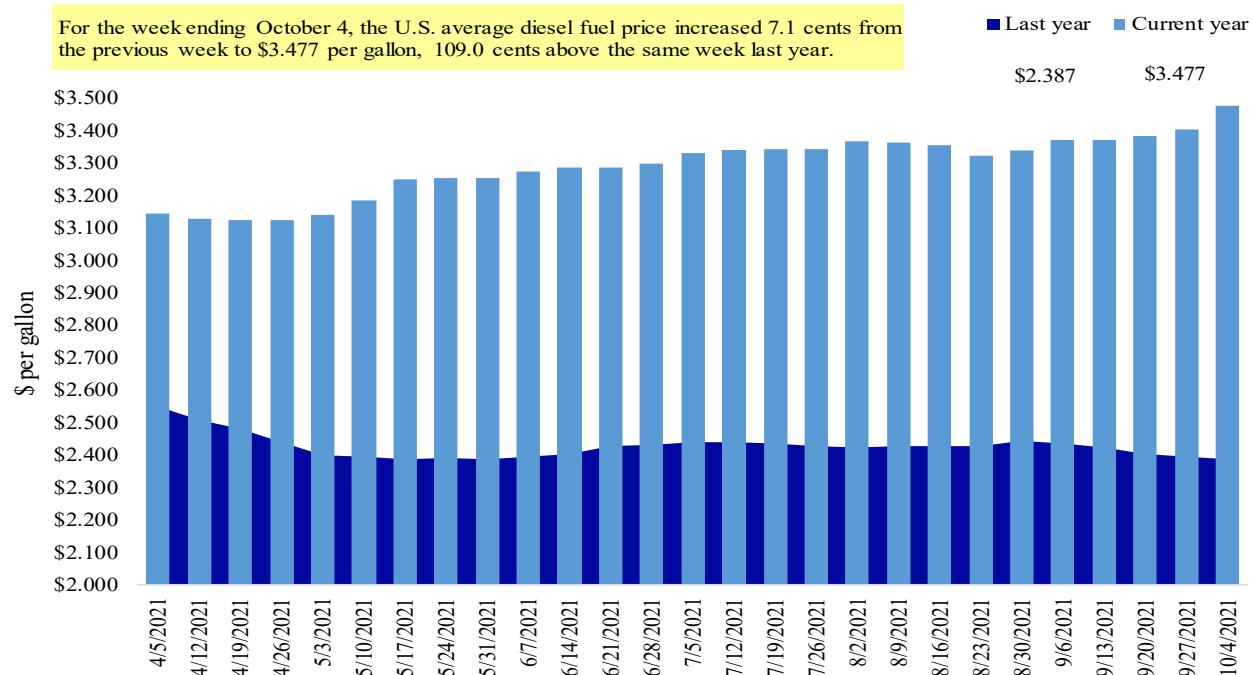
Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.436	0.065	0.963
	New England	3.335	0.036	0.758
	Central Atlantic	3.572	0.058	0.917
	Lower Atlantic	3.362	0.074	1.034
II	Midwest	3.430	0.104	1.171
III	Gulf Coast	3.203	0.061	1.062
IV	Rocky Mountain	3.640	0.035	1.321
V	West Coast	4.072	0.040	1.144
	West Coast less California	3.717	0.053	1.183
	California	4.369	0.030	1.117
Total	United States	3.477	0.071	1.090

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

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

Figure 13

Weekly diesel fuel prices, U.S. average



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

Grain Exports

Table 12

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

For the week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances¹									
9/23/2021	1,568	667	989	582	61	3,866	23,794	23,225	50,884
This week year ago	1,633	321	1,710	1,305	234	5,202	21,879	33,448	60,529
Cumulative exports-marketing year²									
2021/22 YTD	2,692	1,049	1,989	1,419	61	7,209	1,522	1,061	9,793
2020/21 YTD	3,658	807	2,346	1,679	299	8,788	2,743	4,565	16,096
YTD 2021/22 as % of 2020/21	74	130	85	85	21	82	55	23	61
Last 4 wks. as % of same period 2020/21*	98	229	59	46	17	76	110	66	83
Total 2020/21	8,331	1,744	7,337	6,281	654	24,347	66,702	60,287	151,336
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094

¹ Current unshipped (outstanding) export sales to date.

² Shipped export sales to date; 2021/22 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 09/23/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2019-21
	2021/22 current MY	2020/21 last MY		
	1,000 mt -			
Mexico	5,484	4,346	26	14,817
Japan	1,836	2,924	(37)	11,082
China	11,910	9,957	20	7,920
Columbia	849	900	(6)	4,491
Korea	72	346	(79)	3,302
Top 5 importers	20,150	18,473	9	41,613
Total U.S. corn export sales	25,316	24,622	3	53,145
% of projected exports	40%	35%		
Change from prior week ²	370	2,027		
Top 5 importers' share of U.S. corn export sales	80%	75%		78%
USDA forecast September 2021	62,977	69,847	(10)	
Corn use for ethanol USDA forecast, September 2021	132,080	127,889	3	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; 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 09/23/2021	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2018-20
	2021/22 current MY	2020/21 last MY		
				- 1,000 mt -
China	11,768	20,570	(43)	21,666
Mexico	1,662	1,930	(14)	4,754
Egypt	585	514	14	3,093
Indonesia	160	540	(70)	2,325
Japan	570	591	(3)	2,275
Top 5 importers	14,745	24,145	(39)	34,113
Total U.S. soybean export sales	24,286	38,013	(36)	50,758
% of projected exports	43%	62%		
change from prior week ²	1,094	2,591		
Top 5 importers' share of U.S. soybean export sales	61%	64%		67%
USDA forecast, September 2021	56,948	61,580	92	

¹Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; 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 (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 15

Top 10 importers¹ of all U.S. wheat

For the week ending 09/23/2021	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2018-20
	2021/22 current MY	2020/21 last MY		
				- 1,000 mt -
Mexico	1,895	1,601	18	3,388
Philippines	1,668	1,993	(16)	3,121
Japan	1,149	1,355	(15)	2,567
Korea	664	856	(23)	1,501
Nigeria	1,231	642	92	1,490
China	848	1,480	(43)	1,268
Taiwan	449	673	(33)	1,187
Indonesia	0	551	(100)	1,131
Thailand	290	323	(10)	768
Italy	118	458	(74)	681
Top 10 importers	8,313	9,932	(16)	17,102
Total U.S. wheat export sales	11,075	13,990	(21)	24,617
% of projected exports	46%	52%		
change from prior week ²	290	506		
Top 10 importers' share of U.S. wheat export sales	75%	71%		69%
USDA forecast, September 2021	23,842	27,030	(12)	

¹Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; 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 (carry over 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 09/30/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of:		2020 total*
							Last year	Prior 3-yr. avg.	
Pacific Northwest									
Wheat	400	156	256	11,841	12,678	93	87	102	15,966
Corn	0	46	0	12,368	8,255	150	6	7	9,969
Soybeans	358	94	380	4,344	5,002	87	39	77	14,028
Total	758	296	256	28,553	25,935	110	50	70	39,963
Mississippi Gulf									
Wheat	59	90	65	2,453	3,073	80	37	48	3,422
Corn	580	281	207	31,865	21,844	146	59	64	28,781
Soybeans	399	353	113	12,581	20,297	62	24	32	38,013
Total	1,038	724	143	46,899	45,214	104	35	44	70,215
Texas Gulf									
Wheat	146	111	131	3,251	3,545	92	102	162	4,248
Corn	2	40	5	470	600	78	80	91	723
Soybeans	0	0	n/a	656	483	136	0	0	2,098
Total	148	151	98	4,377	4,628	95	71	125	7,068
Interior									
Wheat	16	43	38	2,409	1,683	143	182	164	2,263
Corn	199	257	77	7,320	6,529	112	120	120	8,683
Soybeans	104	63	166	4,282	4,895	87	53	57	7,274
Total	319	363	88	14,011	13,107	107	101	103	18,220
Great Lakes									
Wheat	23	3	762	342	659	52	44	37	891
Corn	0	0	n/a	94	54	174	n/a	0	111
Soybeans	22	0	n/a	89	407	22	15	23	1,111
Total	45	3	n/a	524	1,120	47	28	31	2,113
Atlantic									
Wheat	0	0	n/a	120	26	454	n/a	n/a	65
Corn	13	1	n/a	56	24	233	89	78	33
Soybeans	6	1	431	1,091	624	175	8	16	1,870
Total	19	2	841	1,268	674	188	35	63	1,968
U.S. total from ports*									
Wheat	644	404	159	20,416	21,664	94	86	105	26,854
Corn	795	625	127	52,173	37,305	140	59	64	48,301
Soybeans	889	511	174	23,044	31,708	73	29	42	64,394
Total	2,327	1,540	151	95,633	90,677	105	49	62	139,548

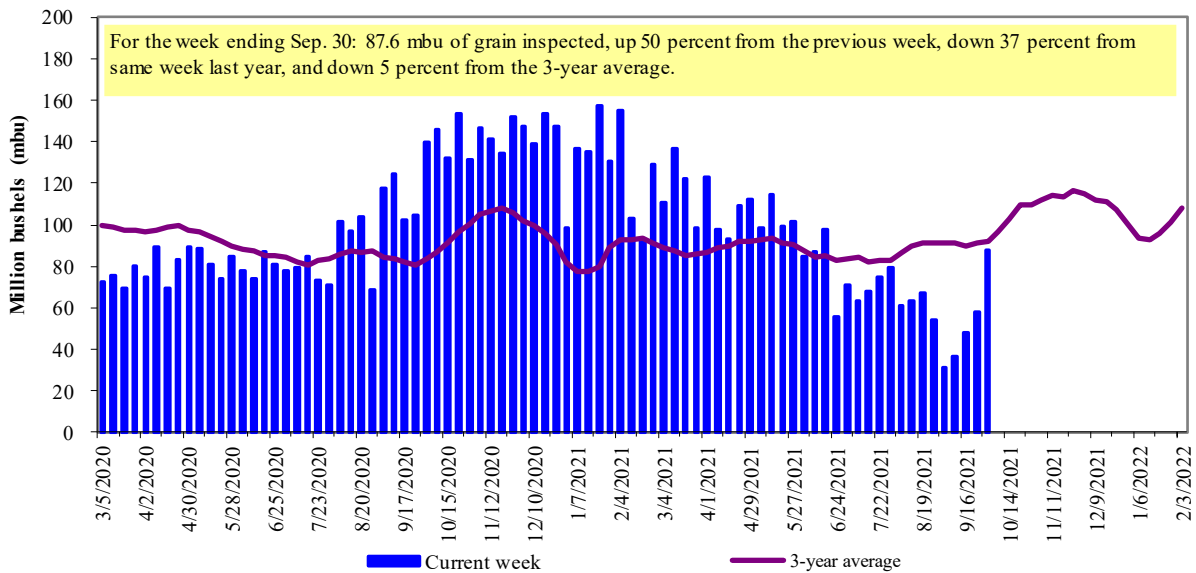
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2020.

Figure 14

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

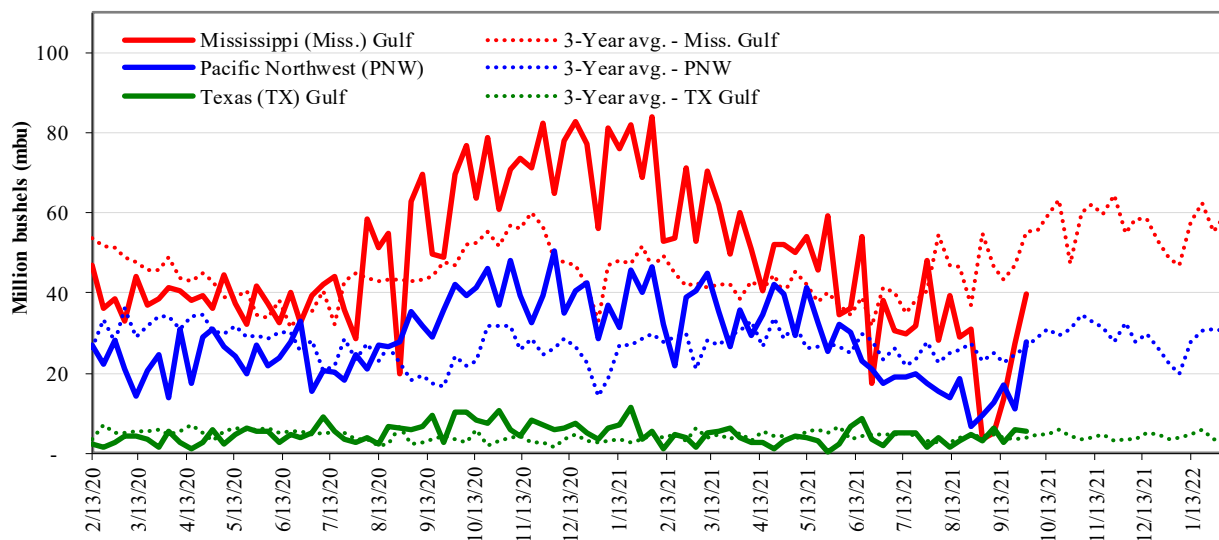


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 09/30/21 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 39.7	Last wk:	up 45	down 4	up 37	up 153
PNW: 27.9	Last Year (same wk):	down 43	down 47	down 44	down 34
TX Gulf: 5.4	3-yr avg.(4-wk. mov. Avg):	down 17	up 35	down 13	up 13

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

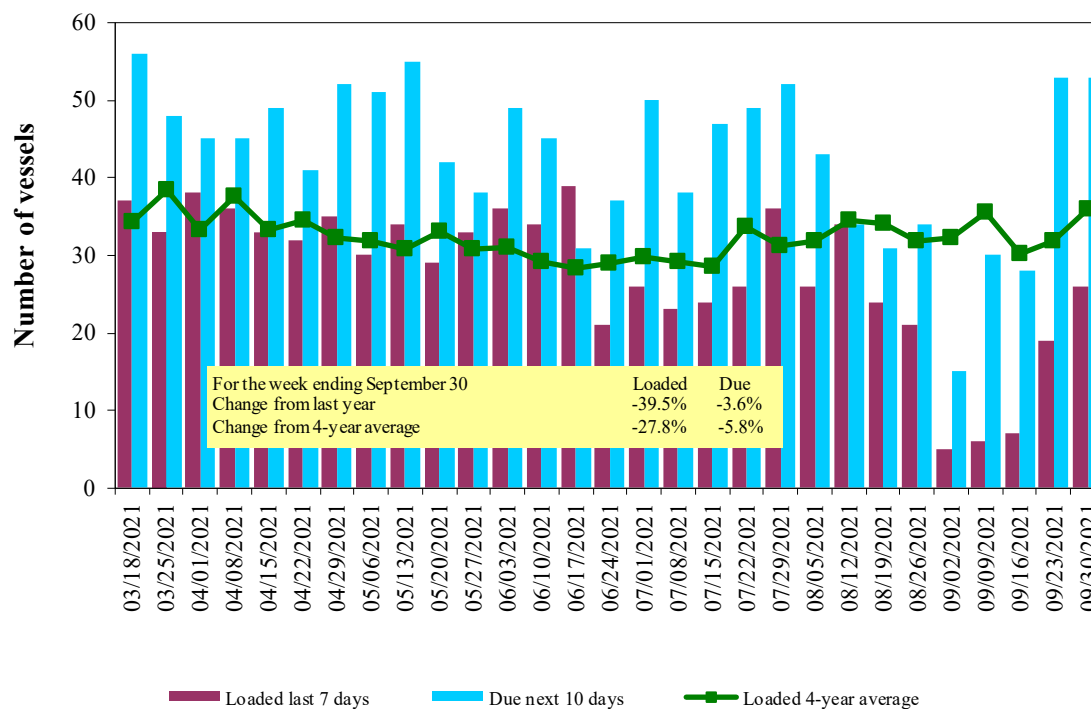
Date	Gulf			Pacific Northwest
	In port	Loaded	Due next	In port
		7-days	10-days	
9/30/2021	57	26	53	11
9/23/2021	57	19	53	11
2020 range	(22...60)	(23...46)	(34...68)	(7...24)
2020 average	37	33	49	15

Note: n/a = not available due to holiday; *Incomplete data due to Hurricane Ida

Source: USDA, Agricultural Marketing Service.

Figure 16

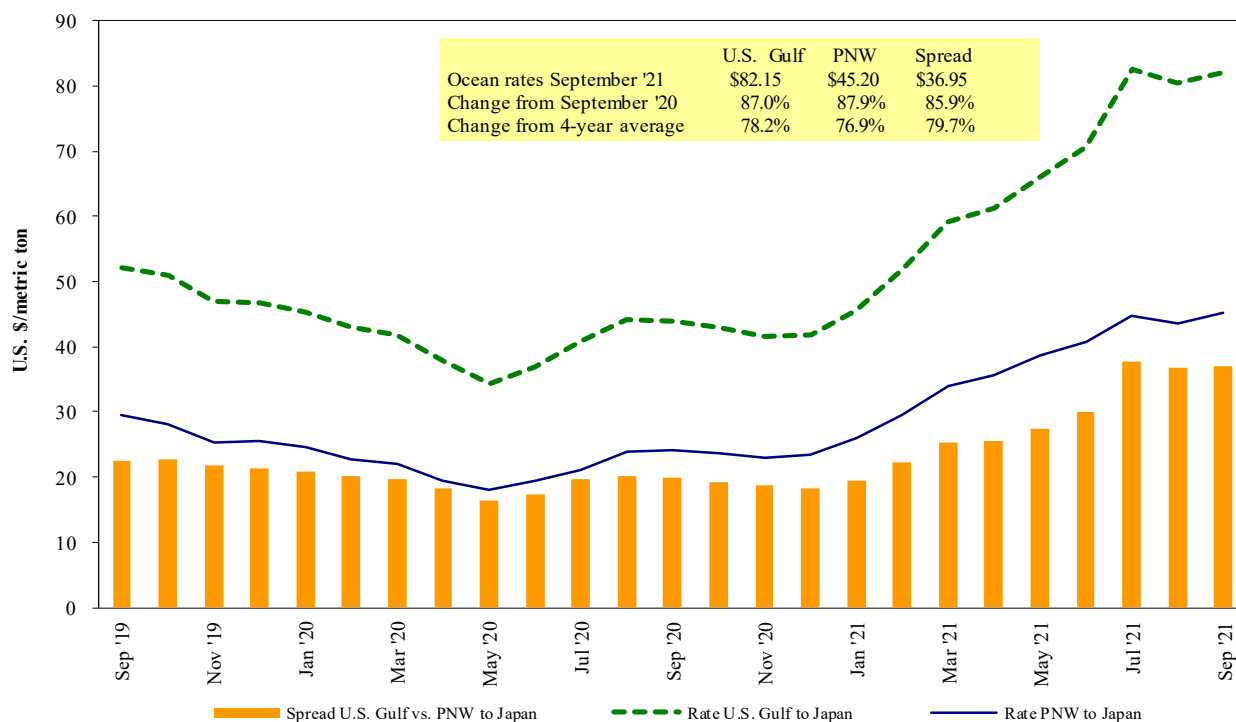
U.S. Gulf¹ vessel loading activity



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 10/02/2021

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	Oct 1/10, 2021	48,000	70.10
U.S. Gulf	Japan	Heavy grain	Aug 21/Sep 9, 2021	50,000	60.90
U.S. Gulf	Japan	Heavy grain	Aug 1/10, 2021	50,000	69.75
U.S. Gulf	Sudan	Wheat	Sep 1/10, 2021	49,000	79.12*
U.S. Gulf	China	Heavy grain	Nov 1/10, 2021	66,000	89.00
U.S. Gulf	China	Heavy grain	Oct 1/10, 2021	55,000	81.50
U.S. Gulf	Djibouti	Wheat	Jul 6/16, 2021	5,880	85.70*
PNW	Japan	Wheat	Sep 1, 2021	52,170	56.55*
PNW	Japan	Wheat	Jul 25/ Aug 5, 2021	32,590	64.00
PNW	Taiwan	Wheat	Nov 1/10, 2021	49,580	67.30
PNW	Taiwan	Heavy grain	Aug 20/30, 2021	35,000	64.20*
PNW	Taiwan	Wheat	Aug 1/10, 2021	55,000	54.95
Brazil	N. China	Heavy grain	Jan 1/5, 2022	64,000	58.25
Australia	Japan	Barley	Nov 1/10, 2021, 2021	55,000	65.50
River Plate	South Korea	Corn	Oct 21	67,000	79.80

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

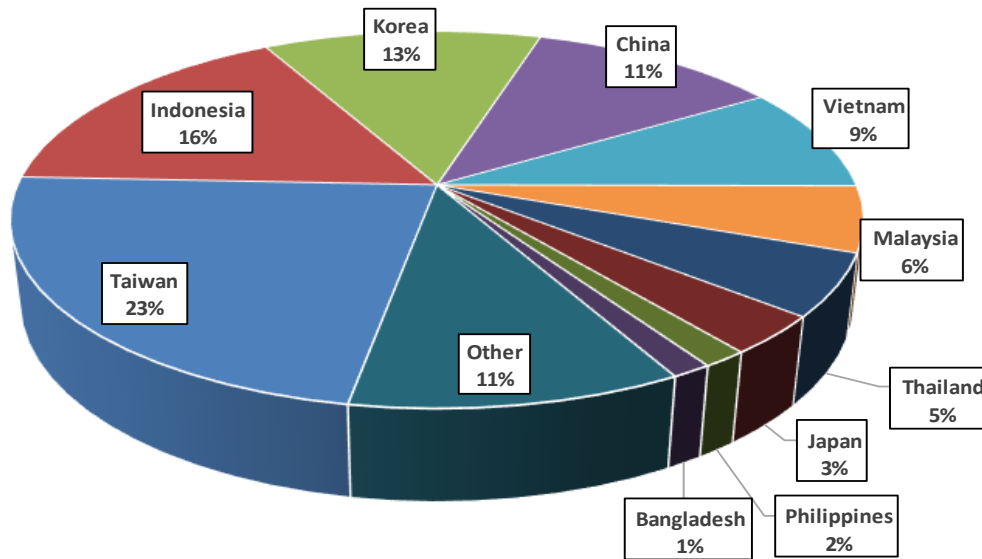
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

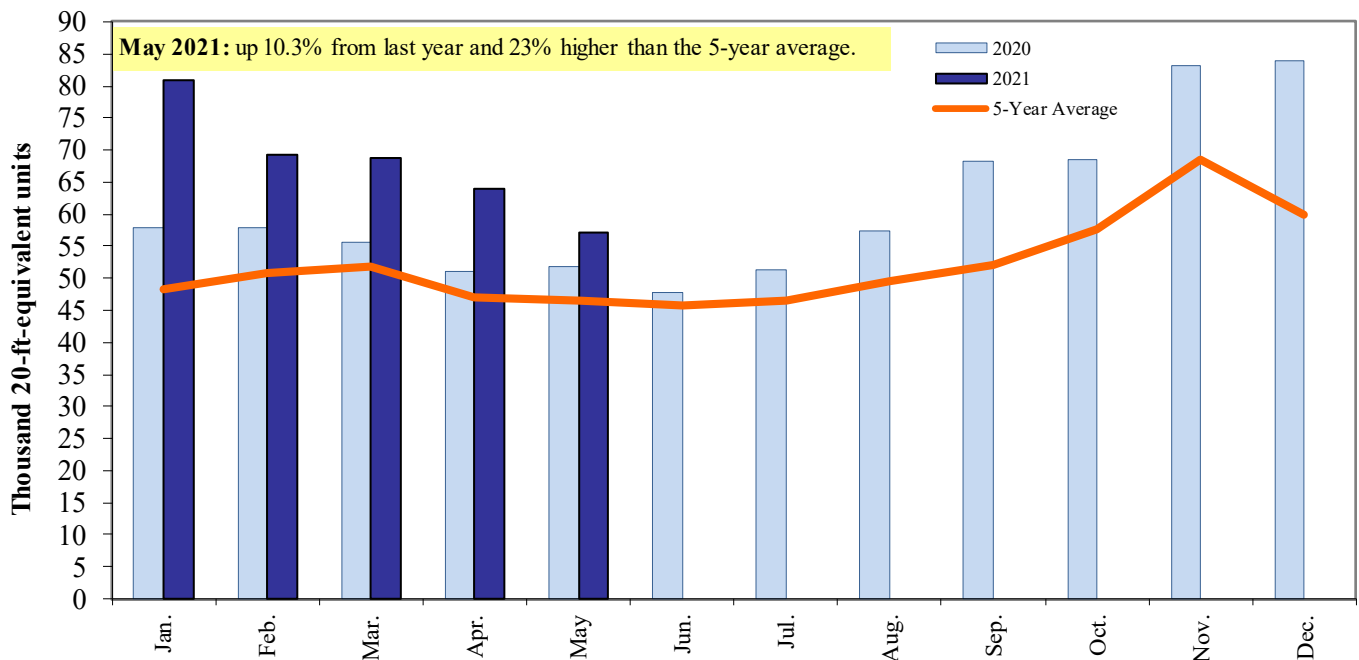
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2021



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 U.S. containerized grain exports



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 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*. October 7, 2021. Web: <http://dx.doi.org/10.9752/TS056.10-07-2021>.

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