



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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October 22, 2020

WEEKLY HIGHLIGHTS

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U.S. DOL Proposes Independent Contractor Rule

On September 25, the U.S. Department of Labor (DOL) announced a proposed rule to clarify the distinction between “employee” and “independent contractor” under the Fair Labor Standards Act (FLSA) for consistent public policy definitions. Regarding California’s Assembly Bill 5 (AB-5) enacted earlier this year, DOL’s proposal would not immediately affect how AB-5 is applied to owner-operators or motor carriers. A preliminary injunction has so far exempted trucking companies from AB-5. AB-5 prohibits companies from using independent contractors unless their work is “outside the usual course of the hiring entity’s business.” This notice of proposed rulemaking (NPRM) is available [for review and public comment](#) until October 26, 2020.

FMCSA Approves Performance-Based Chassis Inspection Training

The Federal Motor Carrier Safety Administration (FMCSA) [granted a request](#) by the Intermodal Association of North America (IANA) for a 5-year limited exemption to the agency’s time-based approach to the chassis inspection training. The exemption will permit IANA to more efficiently qualify container chassis mechanics as equipment or brake inspectors, using a “performance-based” approach. Although FMCSA did not specify how IANA was to deliver training in chassis inspections, the agency did specify IANA must require a qualifying individual to receive at least 480 hours of training (notably less than the 1 year required without FMCSA exemption). Further, one-third of the training must be classroom-based, and two-thirds must be hands-on instruction.

Grain Inspections Down but Rail Deliveries to Port Remain Strong

For the week ending October 15, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 3.38 million metric tons (mmt). Total grain inspections were down 12 percent from the previous week, up 31 percent from last year, and up 39 percent from the 3-year average. Inspections were down 53 percent from the previous week for wheat; up 9 percent for corn; and down 10 percent for soybeans. For the same period, Pacific Northwest (PNW) grain inspections increased 6 percent, and Mississippi Gulf decreased by 22 percent. Despite the drop in grain inspections, weekly rail of grain to all ports ([GTR table 3](#)) remained strong, reaching the highest since late October 2016. Increased Asian demand for grain (especially soybeans) in last few weeks have boosted rail deliveries considerably. Compared to the same period in 2019, over the last 4 weeks, total deliveries to each of the major port areas during the last 4 weeks have been much higher. Likewise, deliveries from all ports during the last 4 weeks were up 131 percent from the same period last year.

Snapshots by Sector

Export Sales

For the week ending October 8, **unshipped balances** of wheat, corn, and soybeans totaled 61.3 million metric tons (mmt). This represented a significant increase in outstanding sales from the same time last year. Net **corn export sales** were 0.655 mmt, down 47 percent from the past week. Net **soybean export sales** were 2.6 mmt, up 2 percent from the previous week. Net weekly **wheat export sales** were 0.528 mmt, unchanged from the previous week.

Rail

U.S. Class I railroads originated 27,434 **grain carloads** during the week ending October 10. This was a 3-percent increase from the previous week, 31 percent more than last year, and 22 percent more than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were \$752 above tariff for the week ending October 15. This was \$277 more than last week and \$658 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending October 17, **barge grain movements** totaled 1,115,684 tons. This was 48 percent more than the previous week and 260 percent more than the same period last year.

For the week ending October 17, 699 grain barges **moved down river**—224 barges more than the previous week. There were 933 grain barges **unloaded in New Orleans**, 23 percent higher than the previous week.

Ocean

For the week ending October 15, 33 **oceangoing grain vessels** were loaded in the Gulf—3 percent fewer than the same period last year. Within the next 10 days (starting October 16), 65 vessels were expected to be loaded—23 percent more than the same period last year.

As of October 15, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$43.00. 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 October 19, the U.S. average **diesel fuel price** decreased 0.7 cent from the previous week to \$2.388 per gallon, 66.2 cents below the same week last year.

Feature Article/Calendar

Large Supplies, Fast Harvest Progress, and High Export Demand Boost Grain Transportation

The pace and timing of the harvest, as well as the availability of grain storage, help predict grain transportation demand and shippers' ability to weather transportation disruptions. Snapshots of grain stocks over time and across the country help to illustrate the “when” and “where” of grain transportation demand, both for the recent past and near future. This article uses the latest grain stocks snapshot to better understand recent grain rail carload and export numbers, as well as to illustrate potential transportation demand through the remainder of the harvest.

High Autumn Grain Supplies Boost Potential Movements in MY 2020/21

Grain available for shipping comes either from previously harvested grain held in storage or new yields from ongoing or upcoming harvests.¹ September begins the new marketing year and the beginning of harvest for corn, soybeans, and grain sorghum. By September, the United States has already completed its small grains harvest (e.g., wheat, barley, and oats), so what has not already shipped is currently in the bins. Storage also contains some “old crop” corn, soybeans, and grain sorghum harvested last year.

USDA's National Agricultural Statistics Service (NASS) offers a few snapshots of these values at different points in time. As of September 1, 2020, [NASS reported](#) that farmers and commercial facilities held 7.6 billion bushels (bbu) of grain, down 8 percent from last year.² Grain stocks have been low throughout 2020. [NASS also projected](#) farmers would harvest 19.4 bbu of new crop corn, soybeans, and grain sorghum in marketing year (MY) 2020/21, up 11 percent from a year ago. Over the weeks since September 1, farmers have added new corn, soybeans, and grain sorghum to storage and directly into shipping channels.

Combining these two values—September 1 grain stocks and post-September 1 production—provides an indication of the total “fall grain supplies” available for transportation and use for the next several months, until new crop wheat and other small grains are added in spring 2021. This year's projected fall grain supplies (24.3 bbu) are 4 percent above last year and 1 percent higher than the 3-year average. These higher levels are likely to translate into higher demand for grain transportation compared to recent years.

Grain Movements in MY 2020/21 to Date Are High, Especially for Rail

[USDA projects](#) increased use of corn, soybeans, and wheat in MY 2020/21. Domestic use and exports are each up compared to the past 2 years. Most notably, exports are projected to be 24 percent higher than last year, with domestic use up 1 percent. Based on [historical modal shares](#), an increase in grain destined for export would affect rail and barge shipments, and more domestic use would increase truck shipments.

Exports have already seen a large uptick. June to September grain disappearance was strong, particularly for soybeans, which was up 11 percent from the prior 3-year average.³ Soybean exports surged at the end of the summer, up 13 percent in August from the prior 3-year average. The spike in soybean exports has continued through the week ending October 15. Mainly due to higher shipments to China, this increase suggests both the supply and demand for grain exceed those of recent years.

The rise in exports has resulted in a notable increase in grain movements, particularly for rail. Grain carloads normally decline from late summer through early fall, until the harvest ramps up in mid-October. However, this year, carloads have trended up since late June ([GTR fig. 3](#)). Since September 1 (over the past 6 weeks), carloads have been 18 percent higher than the 3-year average. Compared to their numbers in the past few years, [loaded and billed rail cars for grain](#) have increased considerably in Nebraska, Iowa, Indiana, and Ohio. Similarly, since September 1, barge movements of grain were 7 percent higher than the 3-year average.

Sales Respond to Accelerated MY 2020/21 Harvest and Limited Storage

[As of October 18, 2020](#), U.S. farmers had completed 60 percent of the corn harvest, 19 percentage points (pp) more than last week. The soybean harvest was 75 percent complete, 14 pp more than last week. The corn and soybean

¹ Imports represent another potential source of grain supply during the year but are usually only a small amount.

² This includes corn, soybeans, wheat, grain sorghum, barley, and oats.

³ Grain “disappearance” is measured as the difference in stocks between September 1, 2020, and June 1, 2020. It reflects total use from domestic purposes (food, fuel, feed, etc.) and exports.

harvests are each 17 pp ahead of the 5-year-average schedule. Given the relatively low amounts of grain in storage as of September 1, this accelerated harvest may have supported the increased shipments of grain destined for export.

Looking ahead, storage availability (or lack of it) plays a key role in whether there is pressure to sell immediately during harvest. NASS provides storage and production volumes at the State level, which afford a geographic perspective on transportation demand. Within a particular marketing year and, to a lesser degree, across marketing years, grain storage affects the timing of transportation demand. Where storage is abundant, it weakens harvest's effect on the timing of transportation demand. Conversely, in States where storage is limited relative to production, transportation demand will be more immediately tied to harvest. Significant storage deficits can require storing grain on the ground and lead to rot.

The top panel of figure 1 shows States with a surplus or deficit of storage relative to their combined September 1 grain stocks and projected MY 2020/21 production. Additionally, the bottom panel considers the normal variation in each State's surpluses and deficits over time (using standard deviations over the past 5 years). This panel standardizes the values within each State to provide a sense of whether the surplus or deficit is unusually high or low for that State.

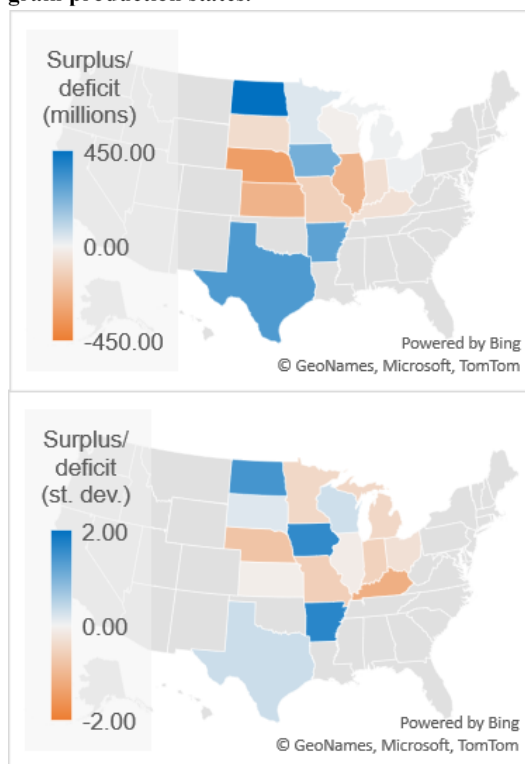
Although some of the top 15 production States have deficit storage levels (per fig. 1), most are not projected to face significant deficits in 2020. A few, like Nebraska and Kentucky, do have grain storage deficits that are somewhat atypical, potentially suggesting a more immediate demand for grain transportation in those States as harvest progresses. However, the deficits for other States, such as Kansas and Illinois, are not significantly unusual. Moreover, North Dakota, Iowa, and Arkansas all have atypically high storage surpluses.

Outlook

This year, total fall grain storage is less available than last year's, but not notably scarce compared to the 3-year average. The accelerated harvest pace may have further crimped storage since September 1, raising the pressure to sell immediately. As previously discussed, U.S. export sales and shipments over the past several weeks have already risen considerably, which may reflect an increased pressure to sell. Outstanding export sales—which represent exports not yet shipped—remain high, which could support rail and barge movements in the near future. Further, typical domestic-use patterns for several commodities suggest high grain transportation demand, particularly for trucking. Corn used for ethanol generally remains stable throughout the year, while corn fed to livestock is the highest in September, October, and November. The volume of soybeans crushed generally peaks in October, November, and December. All three—corn used for ethanol, corn used for feed, and soybeans crushed—tend to move by truck, suggesting overall demand for grain transportation could remain high for the rest of the calendar year.

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Figure 1: State grain storage surplus/deficits (millions and standardized by state), for the top 15 grain production states.



Source: USDA's Agricultural Marketing Service's analysis of USDA's National Agricultural Statistics Service data.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
10/21/20	160	288	253	349	192	168
10/14/20	161	288	253	352	193	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); 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	10/16/2020	10/9/2020
Corn	IL-Gulf	-1.02	-0.97
Corn	NE-Gulf	-1.09	-1.05
Soybean	IA-Gulf	-1.45	-1.36
HRW	KS-Gulf	-2.44	-2.35
HRS	ND-Portland	-2.95	-2.91

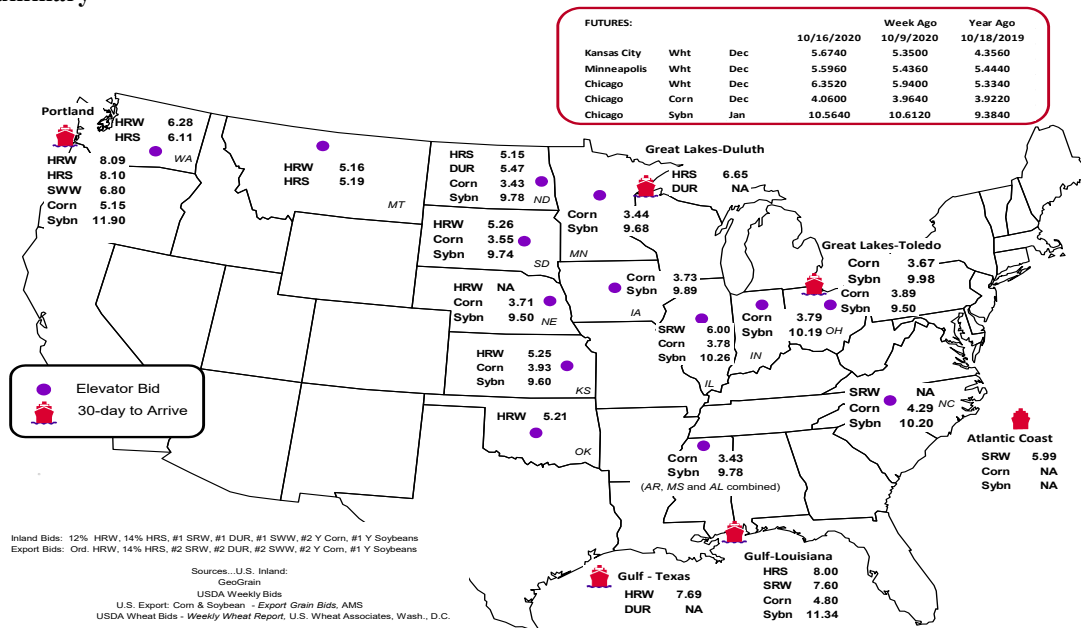
Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

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			
10/14/2020 ^p	1,467	2,258	8,794	738	13,257	10/10/2020	2,215
10/07/2020 ^r	1,588	1,762	8,593	837	12,780	10/3/2020	2,179
2020 YTD ^r	25,209	41,825	209,840	9,911	286,785	2020 YTD	100,451
2019 YTD ^r	36,292	45,405	201,467	14,220	297,384	2019 YTD	100,363
2020 YTD as % of 2019 YTD	69	92	104	70	96	% change YTD	100
Last 4 weeks as % of 2019 ²	356	203	220	278	231	Last 4wks. % 2019	92
Last 4 weeks as % of 4-year avg. ²	164	156	153	120	153	Last 4wks. % 4 yr.	94
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.

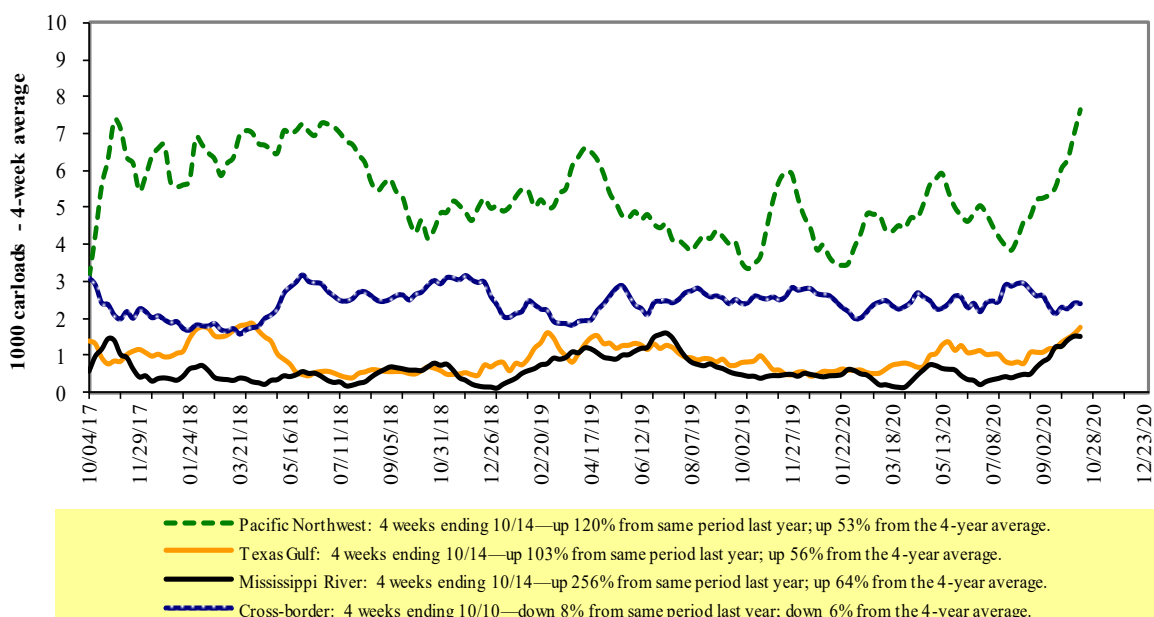
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 10/10/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,017	2,733	13,680	1,558	7,446	27,434	5,294	5,344
This week last year	1,637	2,117	10,993	1,134	5,022	20,903	3,608	5,358
2020 YTD	67,204	97,205	452,429	44,085	215,591	876,514	171,606	190,301
2019 YTD	73,938	110,943	445,023	46,494	207,856	884,254	165,179	181,874
2020 YTD as % of 2019 YTD	91	88	102	95	104	99	104	105
Last 4 weeks as % of 2019*	107	105	139	111	137	130	126	112
Last 4 weeks as % of 3-yr. avg.**	101	92	125	120	123	118	120	107
Total 2019	91,611	136,934	568,369	58,527	260,269	1,115,710	212,510	235,892

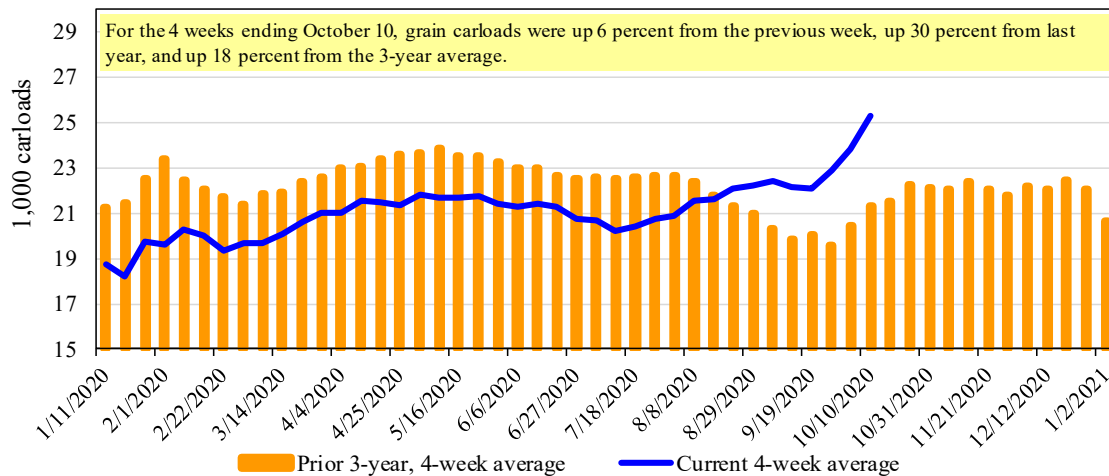
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 10/15/2020		Delivery period							
		Nov-20	Nov-19	Dec-20	Dec-19	Jan-21	Jan-20	Feb-21	Feb-20
BNSF ³	COT grain units	0	no bid	15	no bid	0	no bid	no bid	no bid
	COT grain single-car	0	0	0	0	0	6	0	7
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no bid	no offer	no bid	no offer	no 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.

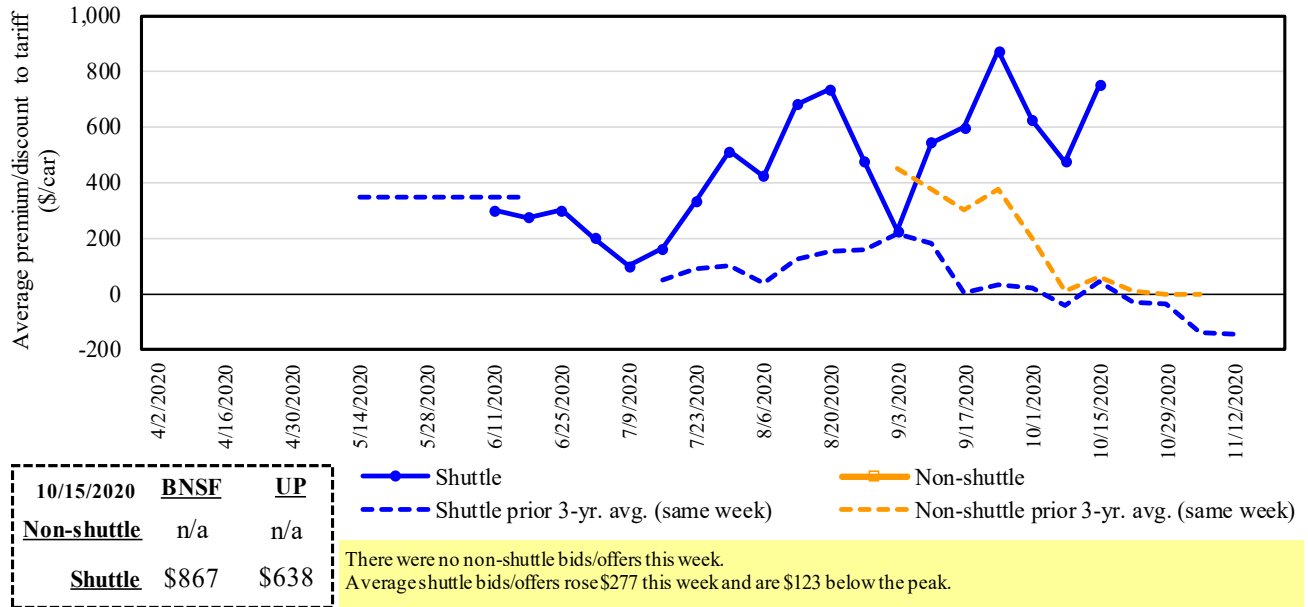
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

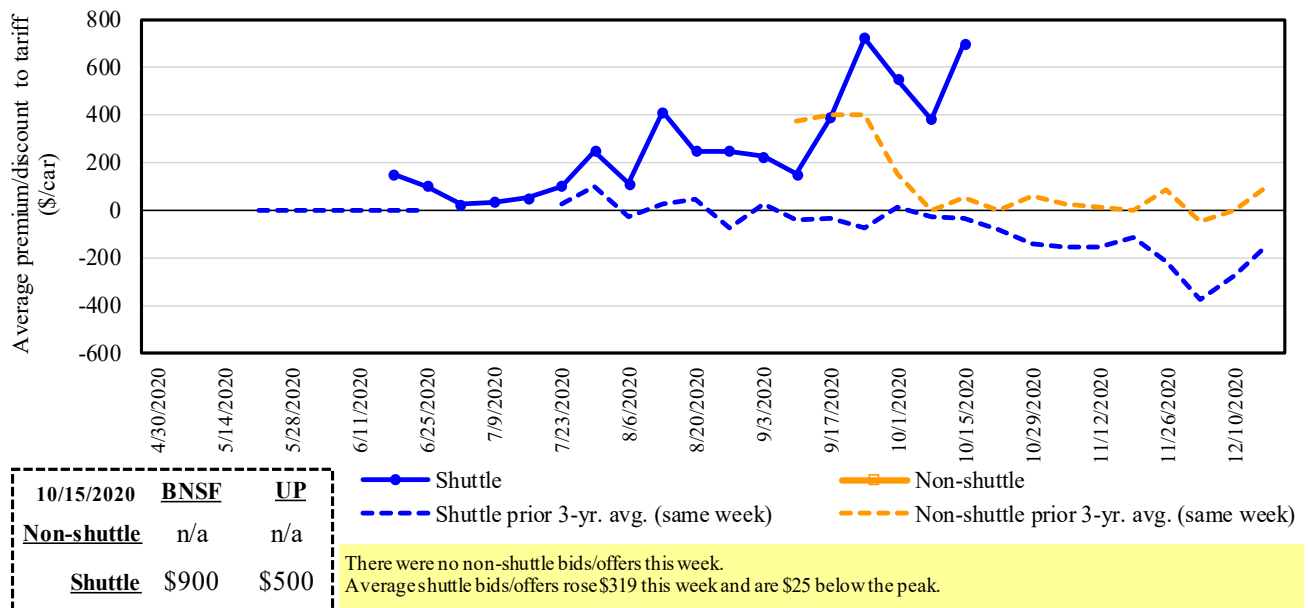
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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

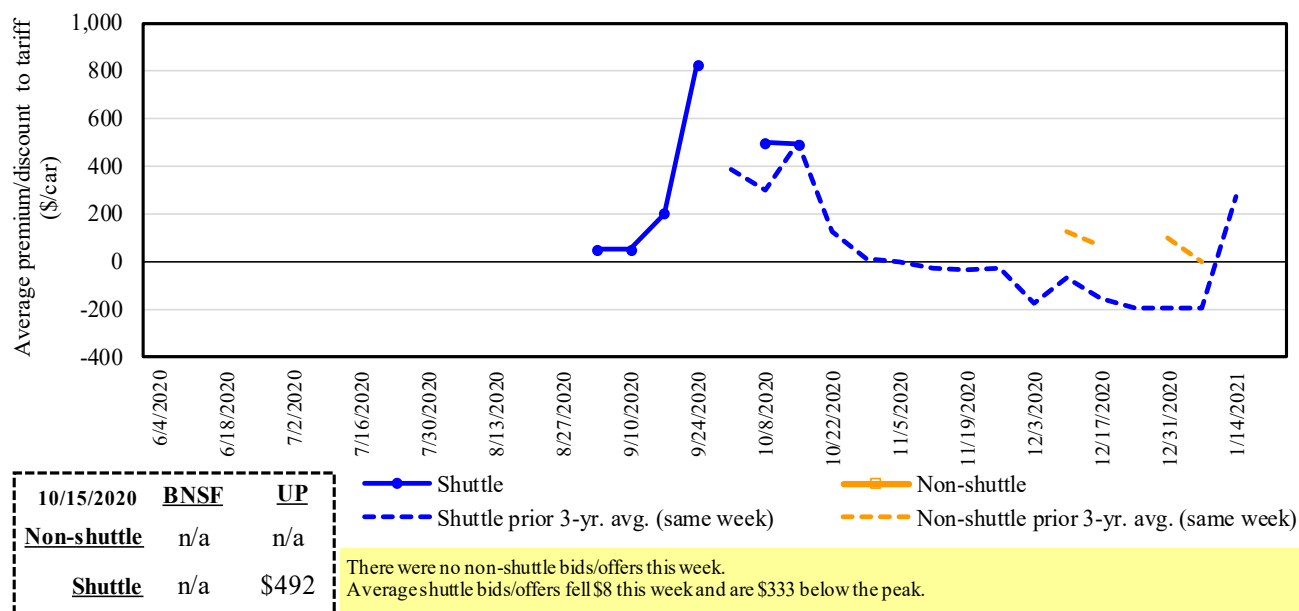
Figure 5
Bids/offers for railcars to be delivered in December 2020, secondary market



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 January 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					
		Nov-20	Dec-20	Jan-21	Feb-21	Mar-21	Apr-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	867	900	n/a	n/a	n/a	n/a
	Change from last week	267	400	n/a	n/a	n/a	n/a
	Change from same week 2019	629	900	n/a	n/a	n/a	n/a
	UP-Pool	638	500	492	n/a	n/a	n/a
	Change from last week	288	237	n/a	n/a	n/a	n/a
	Change from same week 2019	688	600	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.

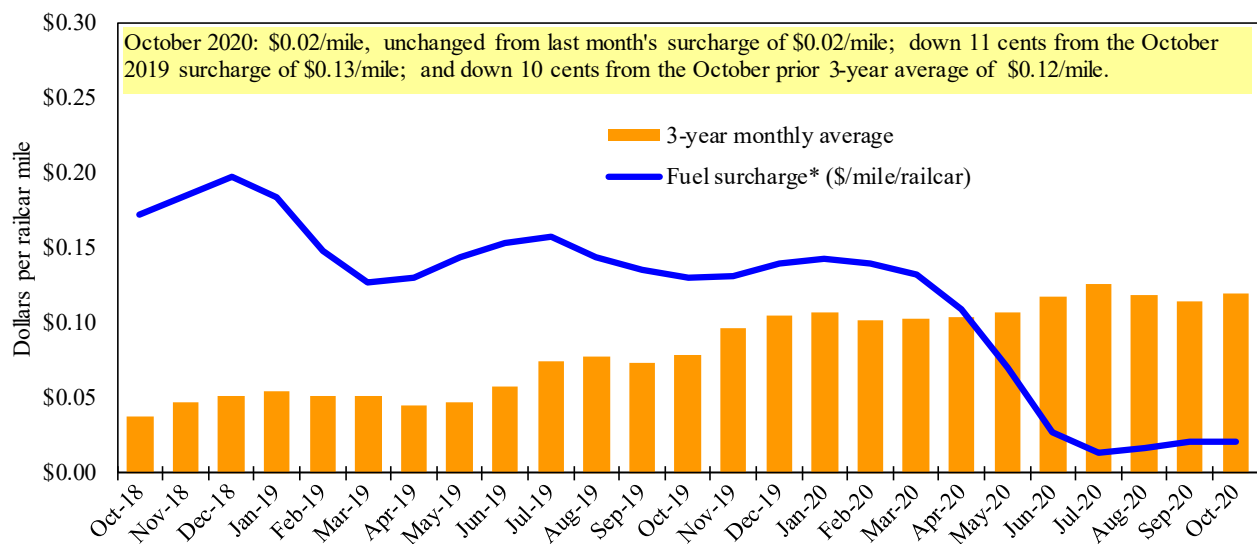
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

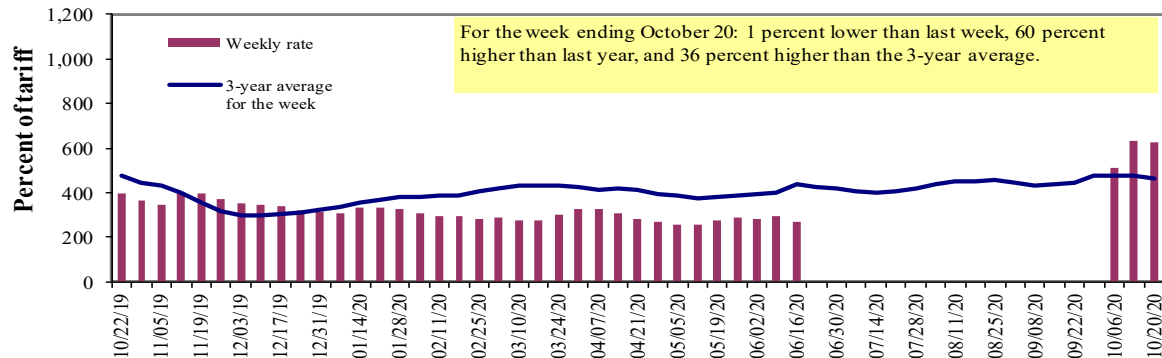
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

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



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

^{3,3}No rates data from 06/23/20 to 09/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.

Source: USDA, Agricultural Marketing Service.

Table 9

Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	10/20/2020	646	638	629	544	529	529	584
	10/13/2020	660	665	634	537	517	517	494
\$/ton	10/20/2020	39.99	33.94	29.19	21.71	24.81	21.37	18.34
	10/13/2020	40.85	35.38	29.42	21.43	24.25	20.89	15.51
Current week % change from the same week:								
	Last year	72	63	60	94	62	62	144
	3-year avg. ²	37	34	36	32	7	7	39
Rate¹	November	619	480	471	386	405	405	364
	January	-	-	456	339	329	329	310

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

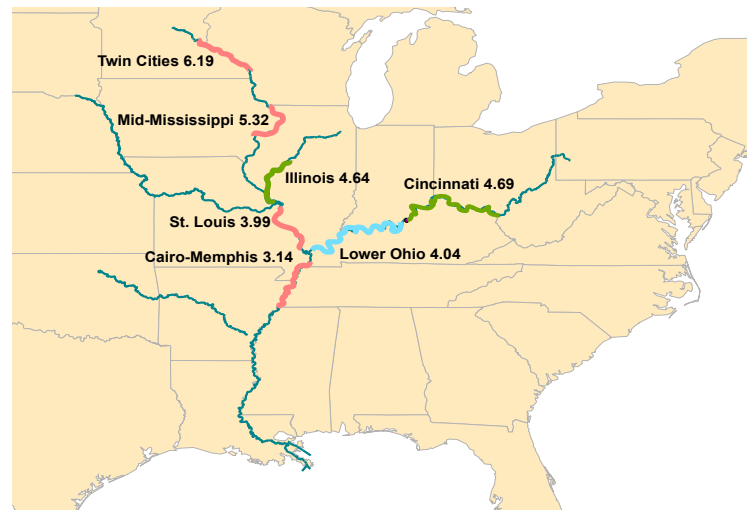
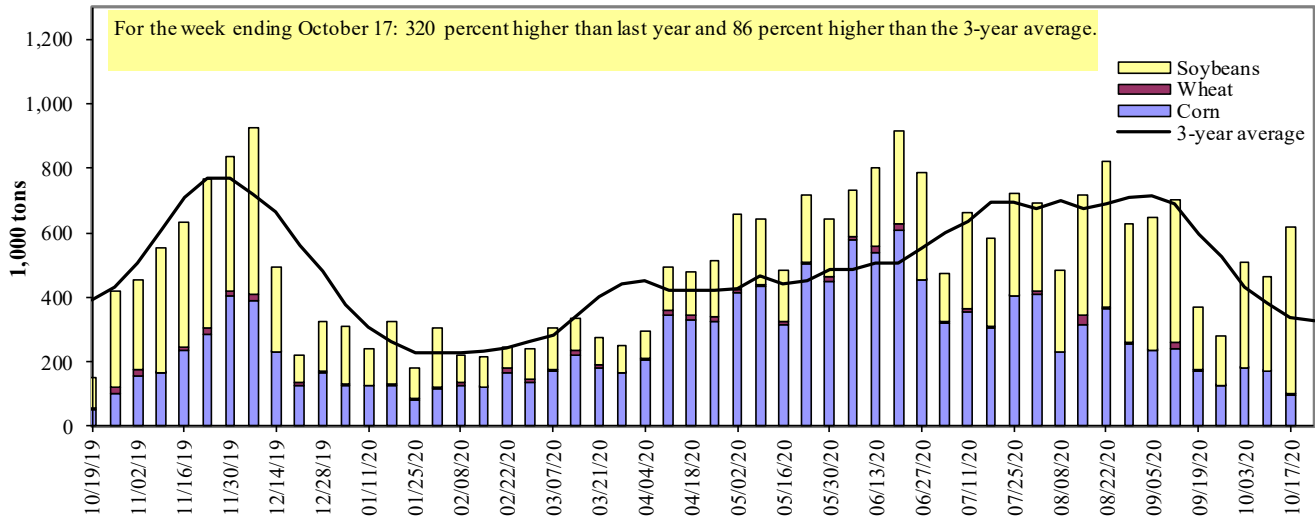


Figure 10

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 10/17/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	16	18	455	2	490
Winfield, MO (L25)	74	3	529	0	607
Alton, IL (L26)	96	3	581	0	680
Granite City, IL (L27)	96	3	520	6	626
Illinois River (La Grange)					
	3	0	2	0	5
Ohio River (Olmsted)					
	160	0	246	29	434
Arkansas River (L1)					
	0	28	28	0	56
Weekly total - 2020	256	31	794	35	1,116
Weekly total - 2019	129	16	164	2	310
2020 YTD ¹	14,610	1,588	12,569	160	28,926
2019 YTD ¹	9,929	1,364	9,994	136	21,423
2020 as % of 2019 YTD	147	116	126	118	135
Last 4 weeks as % of 2019 ²	142	129	187	834	168
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.

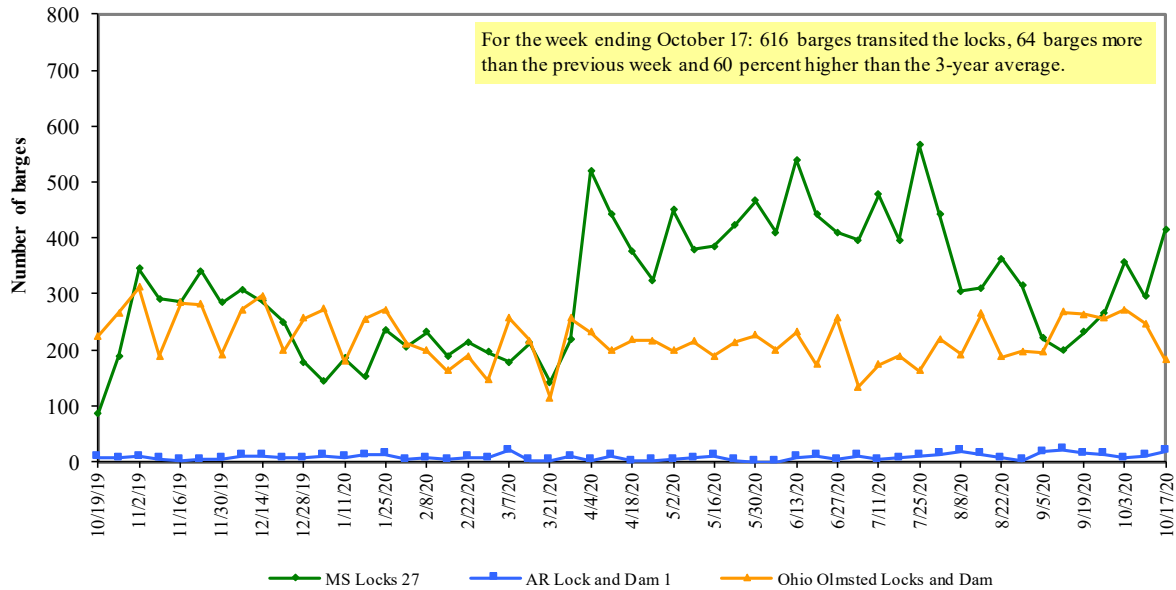
² As a percent of same period in 2019.

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

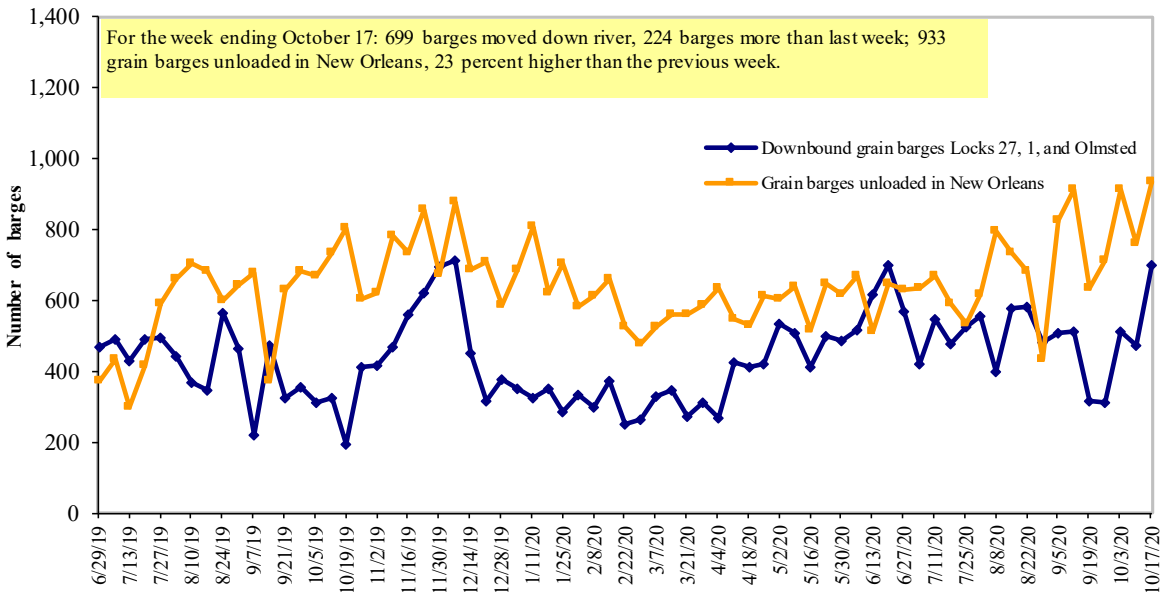
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 10/19/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.465	-0.008	-0.580
	New England	2.575	-0.003	-0.470
	Central Atlantic	2.652	0.003	-0.583
	Lower Atlantic	2.316	-0.016	-0.600
II	Midwest	2.269	-0.006	-0.688
III	Gulf Coast	2.143	-0.005	-0.659
IV	Rocky Mountain	2.326	-0.004	-0.718
	West Coast	2.924	-0.009	-0.751
V	West Coast less California	2.542	0.004	-0.748
	California	3.239	-0.019	-0.741
Total	United States	2.388	-0.007	-0.662

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

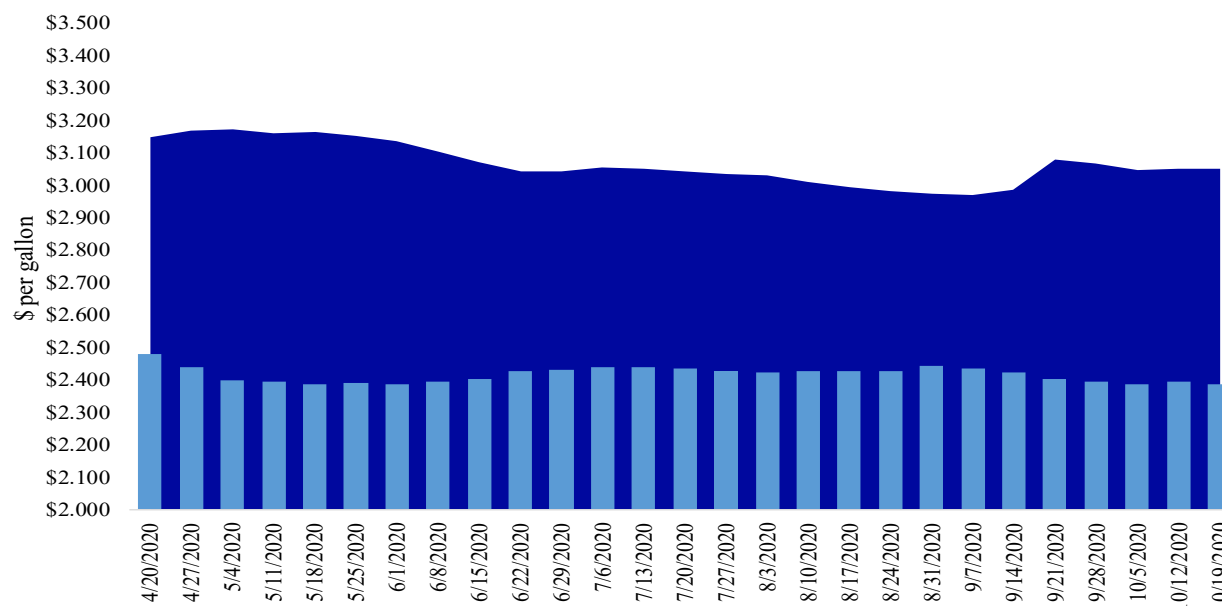
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending October 19, the U.S. average diesel fuel price decreased 0.7 cent from the previous week to \$2.388 per gallon, 66.2 cents below the same week last year.

■ Last year ■ Current year
\$3.050 \$2.388



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									
10/8/2020	1,533	318	1,530	1,450	221	5,052	22,010	34,217	61,279
This week year ago	1,297	590	1,302	1,011	185	4,385	7,727	13,004	25,115
Cumulative exports-marketing year²									
2020/21 YTD	4,097	876	2,826	1,877	322	9,997	4,493	9,018	23,508
2019/20 YTD	3,896	1,138	2,472	1,618	312	9,437	2,638	4,848	16,923
YTD 2020/21 as % of 2019/20	105	77	114	116	103	106	170	186	139
Last 4 wks. as % of same period 2019/20*	122	58	127	133	126	118	280	257	240
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 10/08/2020	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	4,883	5,465	(11)	14,869
Japan	3,460	1,441	140	11,221
Columbia	1,178	481	145	4,830
Korea	339	71	379	4,011
China	10,116	59	16,959	909
Top 5 importers	19,974	7,516	166	35,840
Total U.S. corn export sales	26,503	10,365	156	49,983
% of projected exports	45%	23%		
Change from prior week ²	655	369		
Top 5 importers' share of U.S. corn export sales	75%	73%		72%
USDA forecast October 2020	59,160	45,242	31	
Corn use for ethanol USDA forecast, October 2020	128,270	123,241	4	

¹ Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers¹ of U.S. soybeans

For the week ending 10/08/2020	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	23,700	5,641	320	19,106
Mexico	2,324	2,312	1	4,591
Egypt	684	680	1	2,980
Indonesia	668	438	53	2,360
Japan	668	669	(0)	2,288
Top 5 importers	28,044	9,740	188	31,324
Total U.S. soybean export sales	43,235	17,853	142	49,352
% of projected exports	72%	39%		
change from prior week ²	2,631	1,601		
Top 5 importers' share of U.S. soybean export sales	65%	55%		63%
USDA forecast, October 2020	59,946	45,668	131	

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 10/08/2020	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	1,926	2,089	(8)	3,213
Philippines	2,168	1,608	35	2,888
Japan	1,418	1,360	4	2,655
Nigeria	690	936	(26)	1,433
Korea	858	825	4	1,372
Indonesia	608	335	82	1,195
Taiwan	675	677	(0)	1,175
Thailand	418	418	0	727
Italy	458	423	8	622
Colombia	199	430	(54)	618
Top 10 importers	9,416	9,100	3	15,897
Total U.S. wheat export sales	15,049	13,822	9	23,821
% of projected exports	57%	53%		
change from prior week ²	528	395		
Top 10 importers' share of U.S. wheat export sales	63%	66%		67%
USDA forecast, October 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 10/15/20	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	148	224	66	13,050	11,292	116	89	98	13,961
Corn	0	0	n/a	8,255	6,921	119	706	72	7,047
Soybeans	981	844	116	6,826	7,968	86	557	425	11,969
Total	1,129	1,067	106	28,131	26,182	107	234	187	32,977
Mississippi Gulf									
Wheat	0	72	0	3,145	3,906	81	108	106	4,448
Corn	713	656	109	23,212	17,797	130	183	128	20,763
Soybeans	832	1,246	67	22,306	22,191	101	117	124	31,398
Total	1,545	1,974	78	48,662	43,893	111	134	125	56,609
Texas Gulf									
Wheat	94	206	46	3,845	5,399	71	168	149	6,009
Corn	11	11	100	621	577	108	159	40	640
Soybeans	117	61	193	661	2	n/a	n/a	n/a	2
Total	222	278	80	5,127	5,978	86	242	194	6,650
Interior									
Wheat	8	14	60	1,699	1,588	107	62	84	1,987
Corn	165	156	106	6,840	6,146	111	120	99	7,857
Soybeans	163	206	79	5,264	5,561	95	119	128	7,043
Total	336	375	89	13,803	13,295	104	113	109	16,887
Great Lakes									
Wheat	0	25	0	684	904	76	43	79	1,339
Corn	0	0	n/a	54	0	n/a	n/a	0	11
Soybeans	73	0	n/a	480	473	101	n/a	93	493
Total	73	25	295	1,218	1,377	88	117	82	1,844
Atlantic									
Wheat	2	1	174	30	37	80	689	959	37
Corn	7	2	379	33	99	33	540	276	99
Soybeans	61	116	53	801	1,041	77	474	322	1,353
Total	71	119	59	864	1,177	73	480	322	1,489
U.S. total from ports*									
Wheat	252	542	47	22,451	23,127	97	98	107	27,781
Corn	895	824	109	39,015	31,540	124	178	111	36,417
Soybeans	2,228	2,473	90	36,338	37,235	98	178	176	52,258
Total	3,375	3,839	88	97,804	91,902	106	158	141	116,457

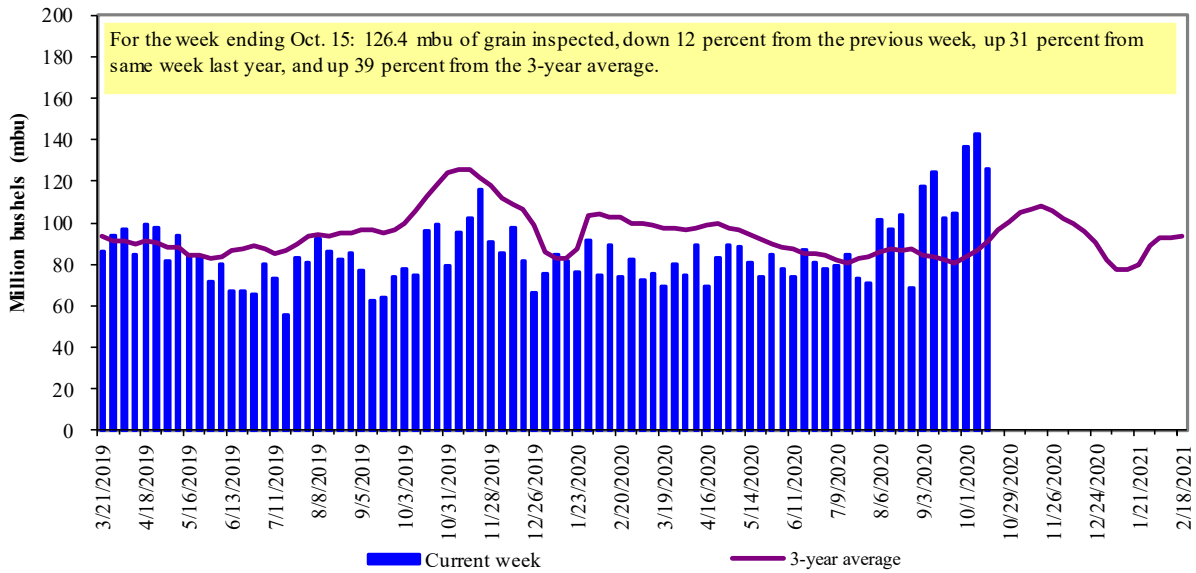
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

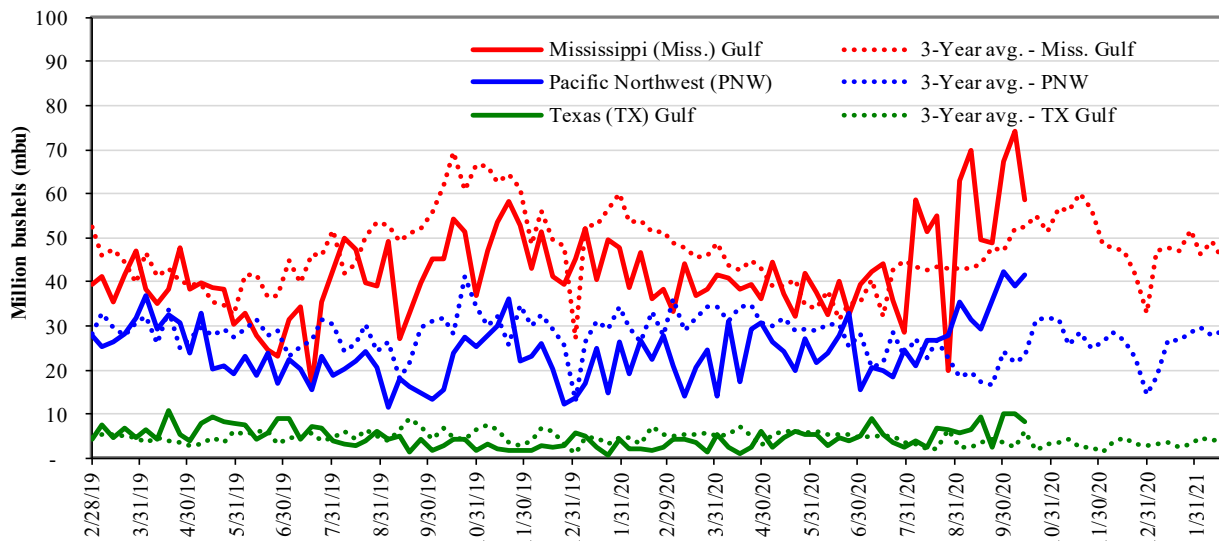


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 10/15/20 inspections (mbu):		Percent change from:			
MS Gulf:	58.6	Last wk:	MS Gulf down 21	TX Gulf down 20	U.S. Gulf down 21
PNW:	41.5	Last Year (same wk):	up 8	up 90	up 14
TX Gulf:	8.2	3-yr avg.(4-wk. mov. Avg):	up 18	up 101	up 24
					PNW up 94

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

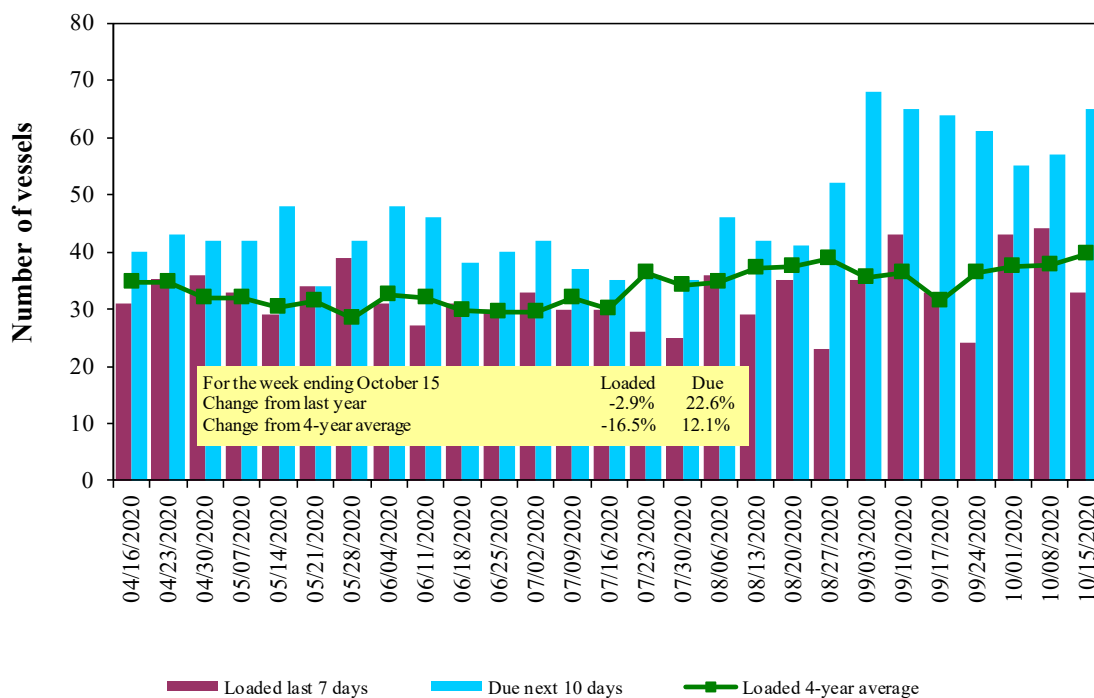
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded	Due next	In port
		7-days	10-days	
10/15/2020	48	33	65	17
10/8/2020	48	44	57	19
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

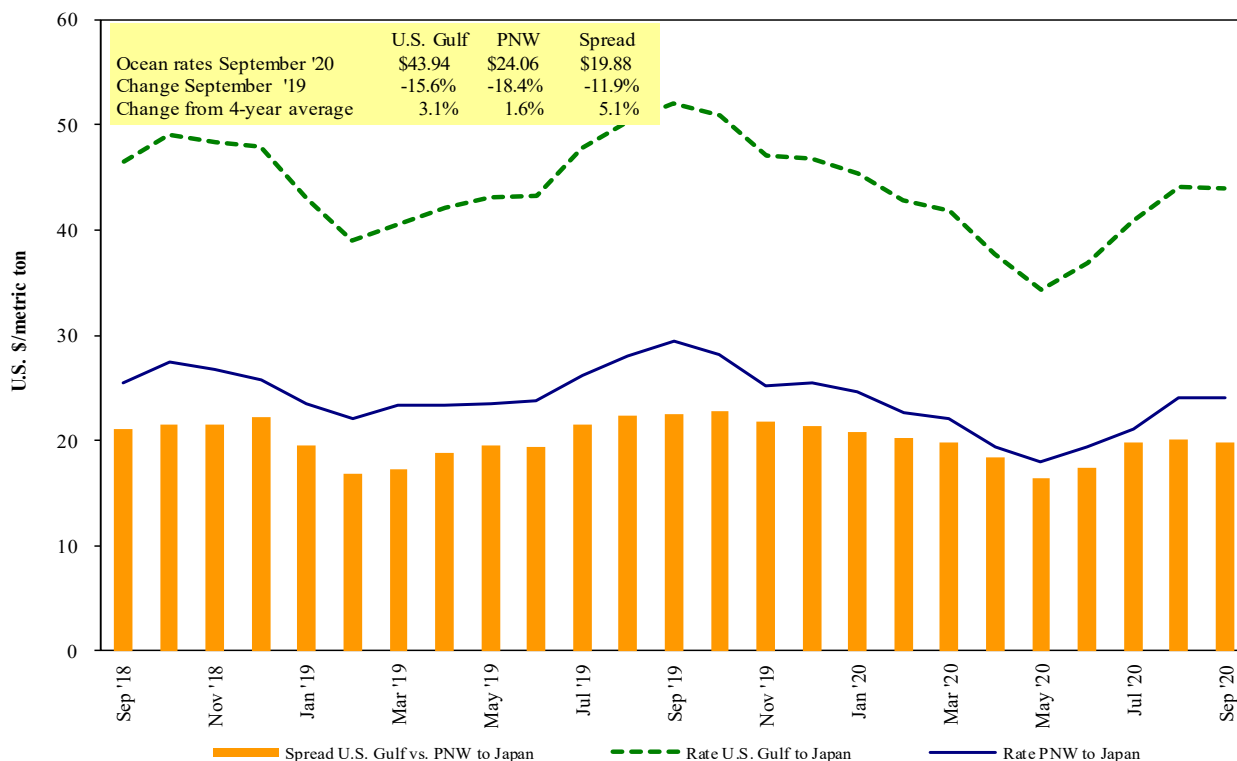
U.S. Gulf¹ vessel loading activity



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 10/17/2020

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.

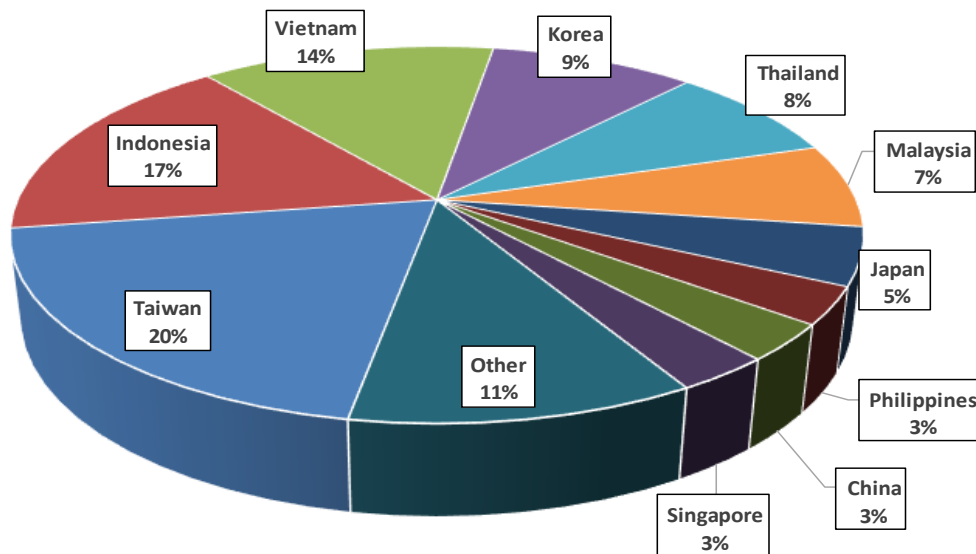
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

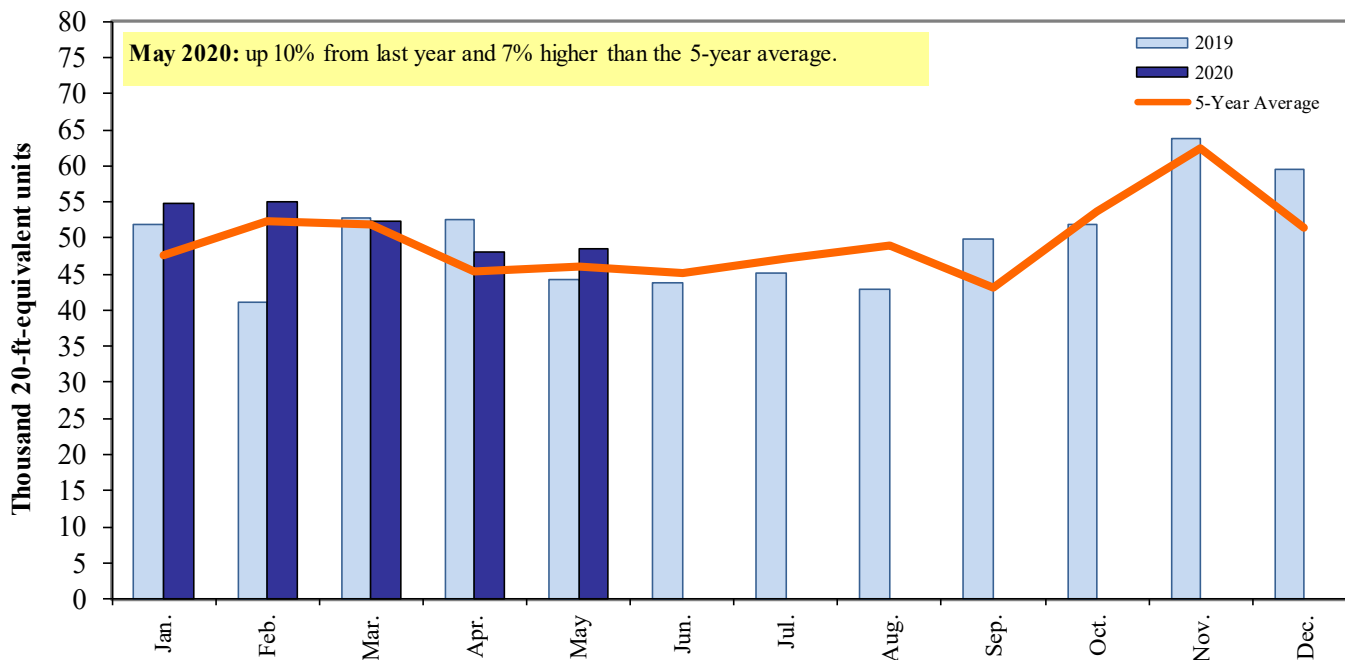
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020



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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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. October 22, 2020. Web: <http://dx.doi.org/10.9752/TS056.10-22-2020>

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