USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE

Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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Contents

The next release is November 4, 2021

WEEKLY HIGHLIGHTS

Ports of LA and Long Beach Assess Emergency Fee for Long Dwell Times

Beginning November 1, the Ports of Los Angeles and Long Beach will assess an "emergency fee" on shipping lines for excessive dwell times of containers on the terminals. Subject to the new fee are shipping lines whose local-delivery containers remain on the terminal for more than 9 days or whose rail containers remain for more than 6 days. For the first day on the terminal past the allowed time period, the cumulative emergency fee begins at $100 per container. The second day adds $200; the third day adds $300; and so on—rising in $100 increments. Thus, a container that remained 3 days past the allowed period would incur a $600 emergency fee. This unprecedented fee demonstrates the severity of the current terminal congestion. While many container ports across the country have been affected, none have had more congestion than the Los Angeles and Long Beach port complex. The record number of container vessels at the complex—waiting at anchor to load and unload—is slowing operations. The two ports will re-invest fees collected from dwelling cargo in programs to enhance efficiency, accelerate cargo velocity, and address congestion throughout the San Pedro Bay. More than 30 percent of containerized grain exports use the Los Angeles and Long Beach port complex.

USACE Awards $139 Million for Ship Channel Improvement in Port of Corpus Christi

The U.S. Army Corps of Engineers (USACE) recently awarded a $139 million contract for the third phase of the Port of Corpus Christi ship channel improvement project. Begun in May 2019, the four-phase, $651 million infrastructure project will increase the channel's depth by 7 feet and width by 130 feet. These changes will allow more than one vessel to pass through the channel at the same time, as well as accommodate supertankers, or very large crude carriers (VLCCs). Extending west of the channel's La Quinta Junction through the Chemical Turning Basin in the port's Inner Harbor, Phase 3 is expected to be completed by June 2023. The project is funded by $161.5 million from the Port of Corpus Christi and $296.3 million from the Federal Government. According to USDA, in 2020, export shipments of bulk grain and grain products accounted for 98 percent of total U.S. waterborne agricultural exports through the Port of Corpus Christi, a key grain export port.

Grain Inspections Recede After 3 Weeks of Increases

For the week ending October 21, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 2.9 million metric tons (mmt). Total grain inspections were down 23 percent from the previous week, down 30 percent from the same time last year, and down 2 percent from the 3-year average. From the previous week, corn inspections fell 48 percent and soybean inspections fell 14 percent, while wheat inspections fell only 1 percent. Total inspections of grain decreased 40 percent in the Mississippi Gulf, mainly because of lower shipments to Latin America. Pacific Northwest (PNW) inspections decreased only 4 percent from the previous week. During the last 4 weeks, total inspections were 20 percent below last year and 4 percent above the 3-year average.

Snapshots by Sector

Export Sales

For the week ending October 14, **unshipped balances** of wheat, corn, and soybeans for marketing year 2021/22 totaled 51.8 million metric tons (mmt), down 17 percent from same time last year and up 2 percent from the previous week. Net **corn export sales** were 1.273 mmt, up 22 percent from the previous week. Net **soybean export sales** were 2.878 mmt, up significantly from last week. Net weekly **wheat export sales** were 0.362 mmt, down 36 percent from the previous week.

Rail

U.S. Class I railroads originated 25,133 **grain carloads** during the week ending October 16. This was a 5-percent increase from the previous week, 2 percent less than last year, and 10 percent more than the 3-year average.

Average November shuttle **secondary railcar** bids/offers (per car) were $285 above tariff for the week ending October 21. This was $230 more than last week and $152 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending October 23, **barged grain movements** totaled 577,104 tons. This was 29 percent lower than the previous week and 48 percent lower than the same period last year.

For the week ending October 23, 365 grain barges **moved down river**—145 barges fewer than the previous week. There were 762 grain barges unloaded in the New Orleans region, 1 percent fewer than last week.

Ocean

For the week ending October 21, 38 **oceangoing grain vessels** were loaded in the Gulf—unchanged from the same period last year. Within the next 10 days (starting October 22), 47 vessels were expected to be loaded—16 percent fewer than the same period last year.

As of October 21, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $91.00. This was 7 percent more than the previous week. The rate from PNW to Japan was $50.00 per mt, 6 percent more than the previous week.

Fuel

For the week ending October 25, the U.S. average **diesel fuel price** increased by 4.2 cents from the previous week to $3.713 per gallon, $1.33 above the same week last year.

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Feature Article/Calendar

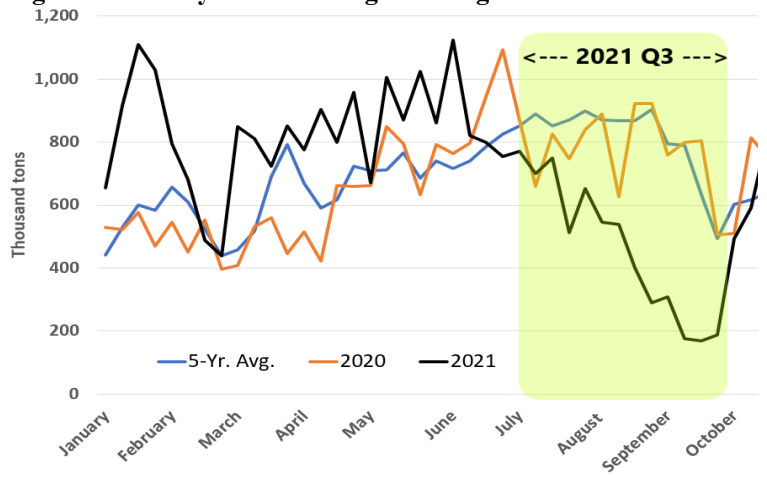
Third-Quarter 2021 Barged Grain Movements Fell as Freight Rates Rose

After holding strong in the first two quarters of the year, downbound grain movements on the Mississippi River declined throughout third quarter 2021, reaching a record low in mid-September. The decline reflected both low grain stocks and the impacts of Hurricane Ida. On the other hand, spot barge freight rates started July relatively low, but trended high by the end of the quarter. This article provides a summary of grain barge movements and third-quarter 2021 spot freight rates.

Weekly Movements Reversed Historical Trend, Dropping to Record Low

Despite a strong performance in the first half of the year, downbound barged grain movements veered from their historical third-quarter pattern in which high volumes persist. Instead, volumes fell steadily throughout the quarter, bottoming at less than 170,000 tons for the week ending September 18 (fig. 1). At least in part, this low tonnage was due to low stocks, depleted by high grain exports from January through June. In the current marketing cycle, strong export demand (mostly from China) and high crop production contributed to high barged grain tonnages from September 2020 through January 2021. By the beginning of January, barges had already moved a record-high accumulated total of 16.3 million tons for marketing year (MY) 2020/21. Weekly movements reached 1 million tons in the third week of January, 57 percent higher than the previous 5-year average (***GTR* table 10**).

Figure 1: Weekly downbound grain barge movements



Source: U.S. Army Corps of Engineers

True to historical patterns, movements remained strong through early June. However—because of low grain stocks, market uncertainty, and logistical issues in the Lower Mississippi—weekly tonnages peaked (at 1.1 million tons) and started to fall in early June. They dropped sharply (about 62 percent) from the third week of July to the end of August.

On August 29, Hurricane Ida made landfall in Louisiana, causing extensive damage to the New Orleans region's electrical distribution system. The storm also damaged both the region's barge fleet and shore-side infrastructure. The Louisiana towns of Destrehan and Convent (roughly, Mississippi River mile markers 120 to160) and Myrtle Grove (mile markers 55 to 60) experienced particularly serious damage. Apart from damage to barge equipment and fleet and harbor service facilities, these areas contended with labor shortages: many workers were absent to deal with personal property damage. In the first half of September, barged grain operations and grain inspections out of the Mississippi River were mostly halted. By mid-September, movements and inspections had dropped to record lows, as the barge industry and the region struggled to resume operations. Still, by the end of September, the 2021 year-to-date (YTD) barged grain movements had reached 26.7 million tons, about 2 percent higher than last year.

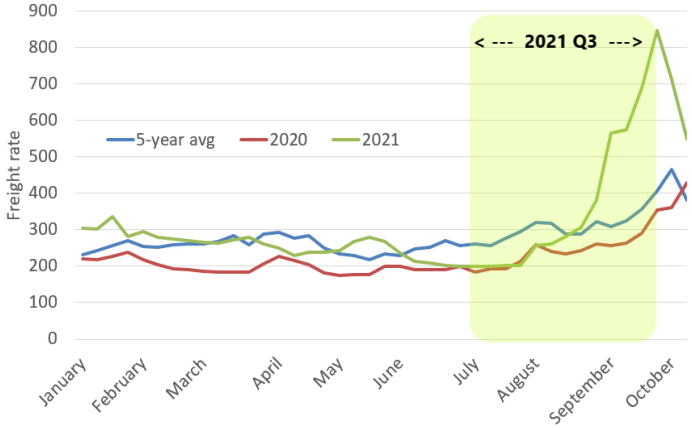
Spot Rates Started Low, but Trended High

Third-quarter barge spot rates in St. Louis started July relatively low, because of sufficient barge supply and fairly stable river conditions for fulfilling commitments to ship the old crop. At the beginning of July,

rates were 200 percent of tariff ($8 per ton, same as last year, but 30 percent lower than the 5-year average).[1] However, the rates started to rise quickly in late August, nearly quadrupling what they were before the hurricane to reach $15.20 per ton, 45 percent higher than third quarter 2020 (year to year) and 18 percent higher than 5-year average (fig. 3).

In the midst of market and weather uncertainty that discouraged offers, the barge industry also reported a tight hopper barge supply as the new marketing year started.[2] Rising spot freight rates were spurred by the challenges of moving empty barges where they were needed; high demand for empty barges from other commodities (such as coal); and rising barge scrapping activities, as market prices for scrap rose. Hurricane Ida amplified the pressure of the shortage by interrupting the loading and inspection operations in the Gulf area and damaging hundreds of hopper barges.

Figure 3: St Louis barge spot freight rates



Source: USDA/AMS/Transportation and Marketing

Accordingly, in the first 2 weeks of September, the St Louis spot rate jumped to 570 percent of tariff ($22.74 per ton, more than double year to year and 77 percent higher than 5-year average). The St. Louis rate then climbed to 845 percent of tariff ($33.71 per ton, 2.4 times higher than last year) at the end of September. These abnormally high rates likely reflect a combination of logistical issues and shortages of both empty barges and labor. Although the tight supply of hopper barges will most likely linger, spot rates are expected to approach their long-term trend in the fourth quarter once northbound traffic normalizes.

Already hampered by long transit and dwell times, the lower Mississippi freight market faced rising spot demand as harvest season began in mid- and late-September.[3] With scarce empty barges, the Memphis-Cairo spot freight rates reached 1,000 percent of tariff ($31.40 per ton) at the end of the third quarter, 201 percent higher than the same week last year, and 162 percent higher than 5-year average. Such an unusually high rate indicates Upper Mississippi locations (like the Lower Mississippi region) would have found few available empty barges toward the end of the third quarter.

Looking Forward

Even as industry continues repairing damaged hopper barges, downbound barged grain movements and barge unload operations in the New Orleans region have largely recovered from Hurricane Ida. Barge unloading operations in the New Orleans region likewise showed signs of healthy recovery. For the week ending October 12, 772 grain barges were unloaded, up significantly from the low volume in mid September, although still 17 percent lower than the 5-year average.

Looking ahead, the harvest season will continue to stimulate demand for grain barges in the near term. Also, recovery of facilities and northbound traffic in the Lower Mississippi area should improve logistics. However, the barge industry still faces a number of challenges. These include a limited supply of hopper barges; high fuel and labor costs; unusually higher ocean vessel freight rates that could prompt shippers to choose different routes; and uncertainty regarding grain export markets. *Matt.Chang@usda.gov*

[1] See this document for the calculation of barge freight rates.
[2] Workboat, October 5, 2021: https://www.workboat.com/coastal-inland-waterways/hopper-barge-supplies-still-stretched.
[3] According to *River Transportation News* (October 18), a towboat that could typically complete a round-trip between Cairo, IL, and the New Orleans area in 16 days needed 30 days to make the same round trip after Hurricane Ida.

Grain Transportation Indicators

Table 1

Grain transport cost indicators[1]

	Truck	Rail		Barge	Ocean	
For the week ending		Non-Shuttle	Shuttle		Gulf	Pacific
10/27/21	249	297	241	327	407	355
10/20/21	246	297	234	350	379	333

[1]Indicator: 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

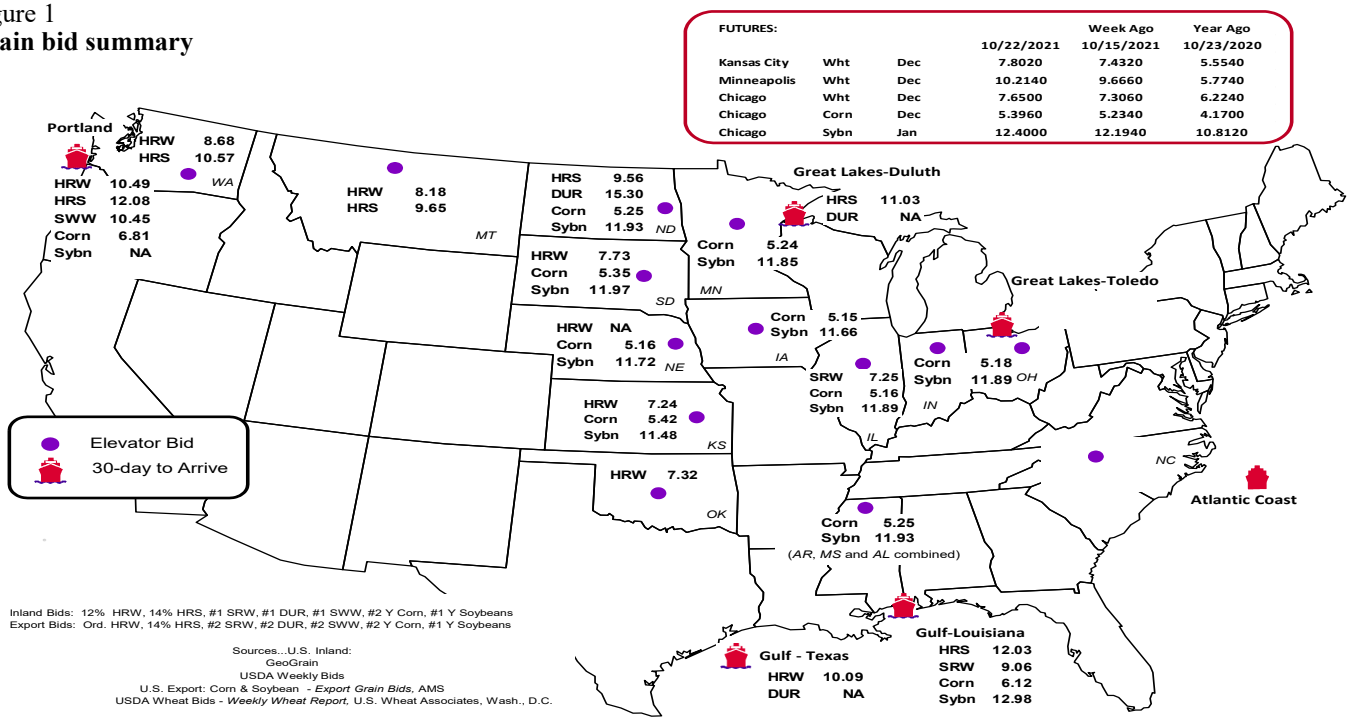
Market Update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	10/22/2021	10/15/2021
Corn	IL–Gulf	-0.96	-0.94
Corn	NE–Gulf	-0.96	-0.92
Soybean	IA–Gulf	-1.32	-1.33
HRW	KS–Gulf	-2.85	-2.75
HRS	ND–Portland	-2.52	-2.45

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 Gulf	Texas Gulf	Pacific Northwest	Atlantic & East Gulf	Total	Week ending	Cross-border Mexico[3]
10/20/2021[p]	1,098	1,834	9,789	737	13,458	10/16/2021	2,678
10/13/2021[r]	1,015	1,703	9,709	1,136	13,563	10/9/2021	2,189
2021 YTD[r]	39,928	54,148	229,956	13,472	337,504	2021 YTD	116,437
2020 YTD[r]	25,209	41,825	209,868	12,656	289,558	2020 YTD	102,758
2021 YTD as % of 2020 YTD	158	129	110	106	117	% change YTD	113
Last 4 weeks as % of 2020[2]	47	96	103	74	92	Last 4wks. % 2020	109
Last 4 weeks as % of 4-year avg.[2]	70	149	144	113	133	Last 4wks. % 4 yr.	104
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

[1]Data is incomplete as it is voluntarily provided.

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

[3] Cross-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.

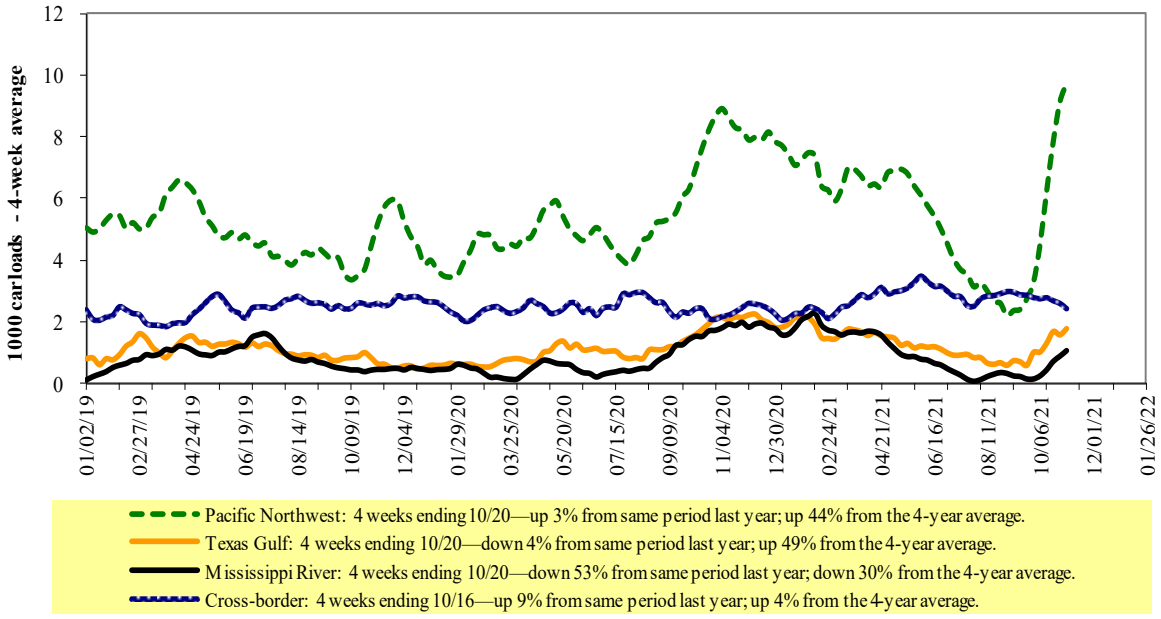
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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:	East		West			U.S. total	Canada	
10/16/2021	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,177	2,226	12,916	1,567	6,247	25,133	4,815	4,785
This week last year	2,497	2,637	12,835	1,230	6,348	25,547	5,875	5,911
2021 YTD	71,968	97,350	472,661	49,242	250,778	941,999	167,802	194,026
2020 YTD	69,701	98,726	465,264	45,315	221,939	900,945	176,301	196,212
2021 YTD as % of 2020 YTD	103	99	102	109	113	105	95	99
Last 4 weeks as % of 2020*	83	87	90	114	100	93	85	84
Last 4 weeks as % of 3-yr. avg.**	86	91	105	130	119	106	92	93
Total 2020	91,659	129,813	613,630	57,782	296,701	1,189,585	238,133	261,778

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

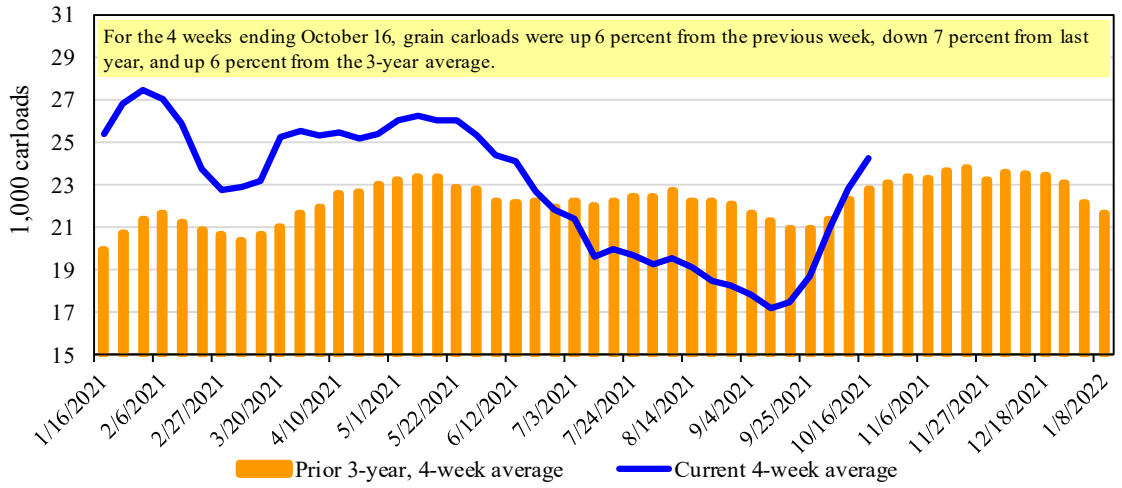
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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 offerings[1] ($/car)[2]

For the week ending:		Delivery period							
10/21/2021		Nov-21	Nov-20	Dec-21	Dec-20	Jan-22	Jan-21	Feb-22	Feb-21
BNSF[3]	COT grain units	46	0	0	0	0	no bid	0	no bid
	COT grain single-car	106	0	2	0	12	50	1	0
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

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

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

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

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

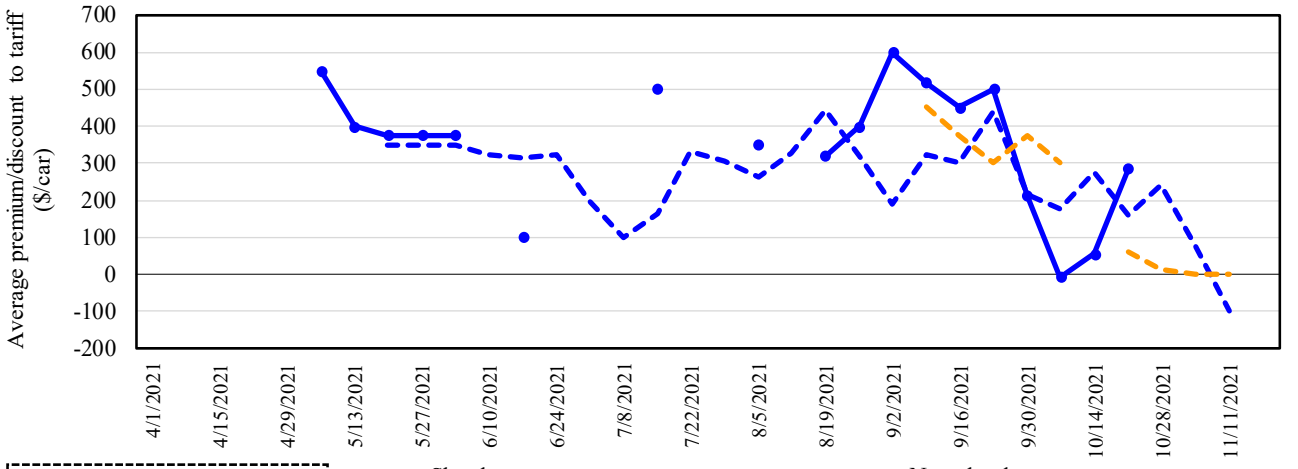
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

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

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

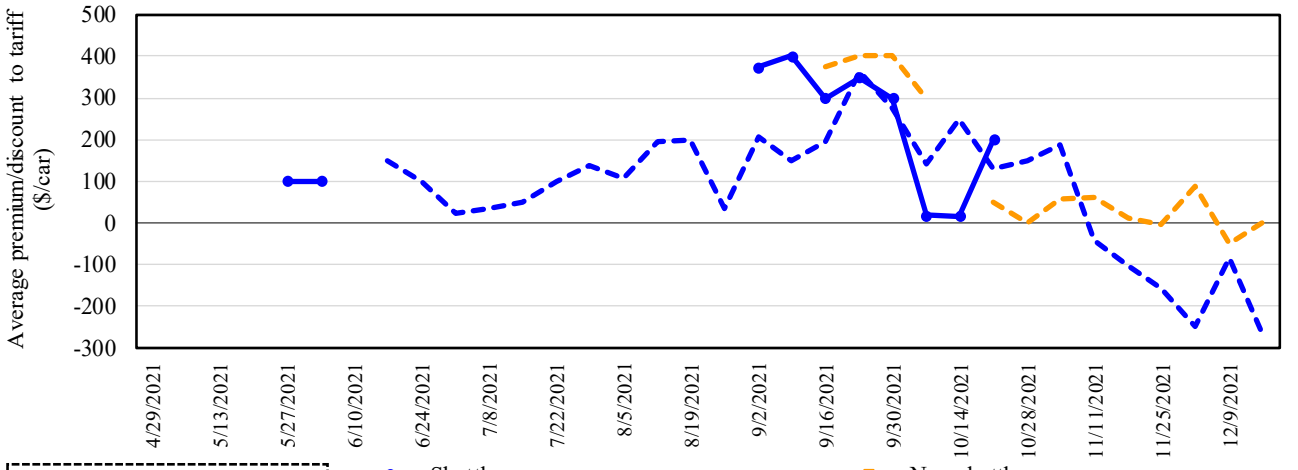


10/21/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$288	$283

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $230 this week and are $315 below 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.

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



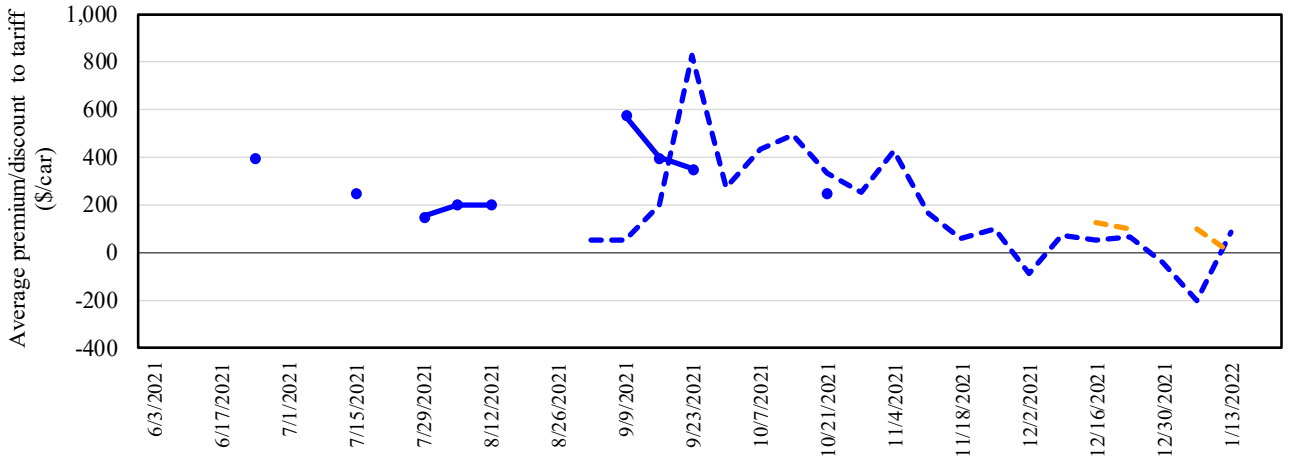
10/21/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$200	n/a

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose $183 this week and are $200 below 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.

Figure 6

Bids/offers for railcars to be delivered in January 2022, secondary market



10/21/2021	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	$250	n/a

There were no non-shuttle bids/offers this week.
There were no shuttle bids/offers last week. Average non-shuttle bids/offers this week are $325 below 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: 10/21/2021		Delivery period					
		Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22
Non-shuttle	**BNSF-GF**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a
	UP-Pool	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	**BNSF-GF**	**288**	**200**	**250**	**n/a**	**n/a**	**n/a**
	Change from last week	227	183	n/a	n/a	n/a	n/a
	Change from same week 2020	(263)	(200)	n/a	n/a	n/a	n/a
	UP-Pool	**283**	**n/a**	**n/a**	**n/a**	**n/a**	**n/a**
	Change from last week	233	n/a	n/a	n/a	n/a	n/a
	Change from same week 2020	(42)	n/a	n/a	n/a	n/a	n/a

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

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool; BNSF = BNSF Railway; UP = Union Pacific Railroad.

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

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff rail rates for unit and shuttle train shipments[1]

October 2021	Origin region[3]	Destination region[3]	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[4]
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
	Amarillo, TX	Los Angeles, CA	$5,121	$353	$54.36	$1.48	5
Corn	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
	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
Soybeans	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
	Champaign-Urbana, IL	New Orleans, LA	$4,745	$262	$49.72	$1.35	6
Shuttle train							
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
	Council Bluffs, IA	Stockton, CA	$5,300	$0	$52.63	$1.34	4
Soybeans	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

[1] A 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.

[2] Approximate load per car = 111 short tons (100.7 metric tons): corn 56 pounds per bushel (lbs/bu), wheat and soybeans 60 lbs/bu.

[3] Regional economic areas are defined by the Bureau of Economic Analysis (BEA).

[4] Percentage 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							
Commodity	Origin state	Destination region	Tariff rate per car[1]	Fuel surcharge per car[2]	Tariff rate plus fuel surcharge per: metric ton[3]	bushel[3]	Percent change[4] Y/Y
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	Tlalnepantla, 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

[1]Rates 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.

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

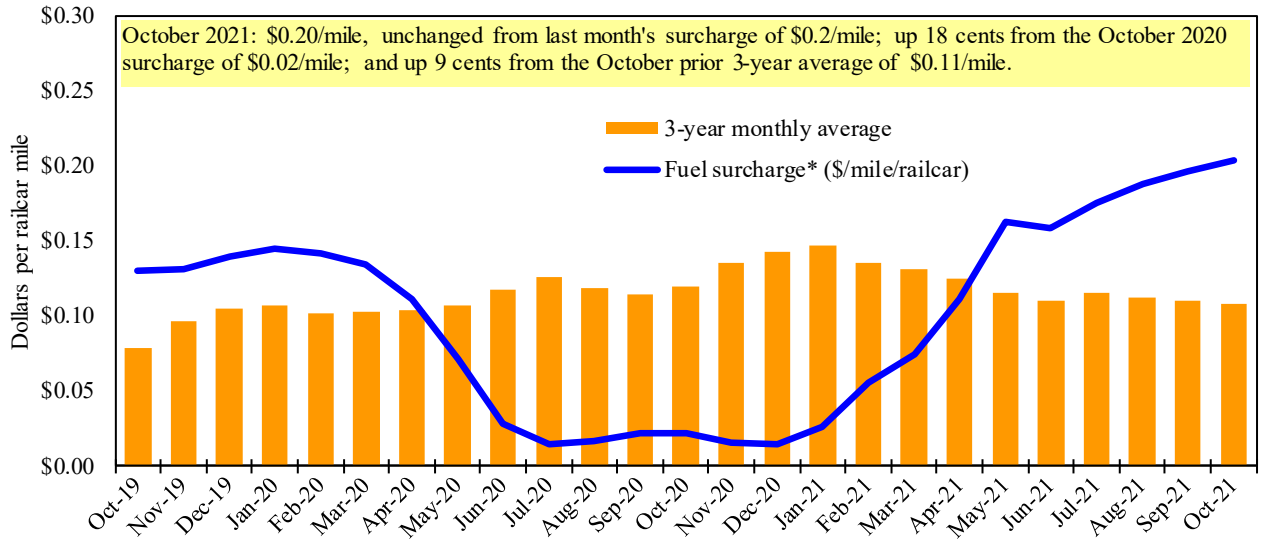
[3]Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu.

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

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

Figure 7

Railroad fuel surcharges, North American weighted average[1]



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

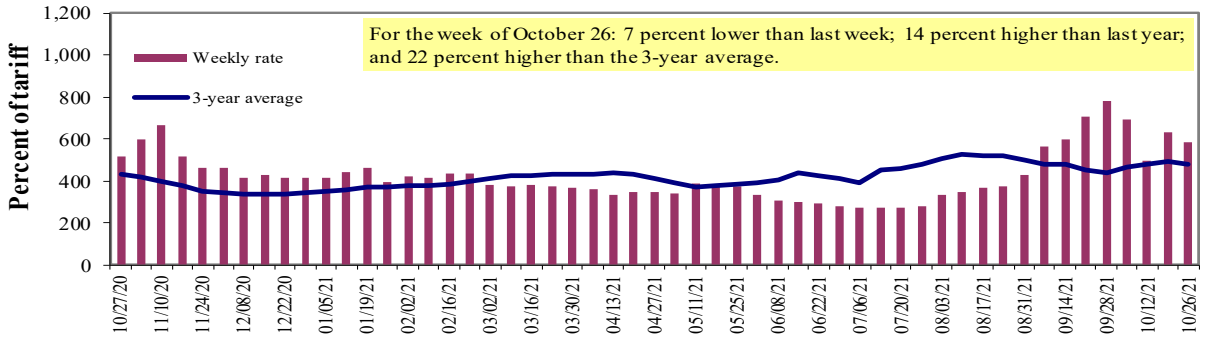
* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

**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]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.
*Source: USDA, Agricultural Marketing Service.

Table 9
Weekly barge freight rates: Southbound only

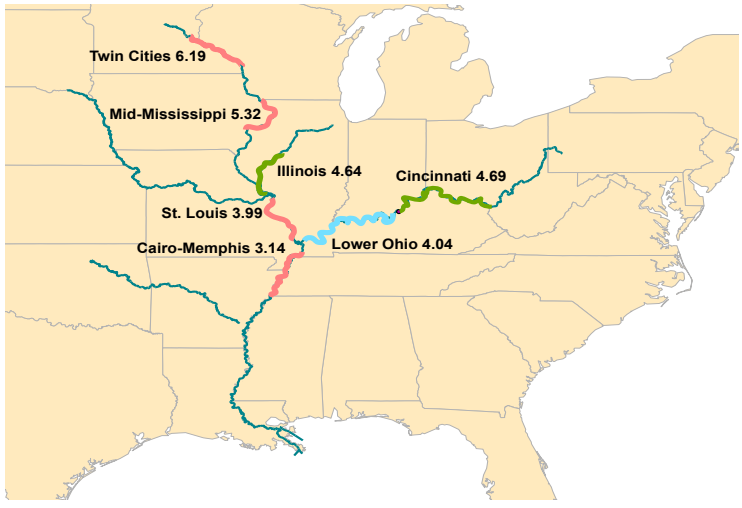
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	10/26/2021	550	613	588	575	663	663	575
	10/19/2021	562	650	630	789	817	817	713
$/ton	10/26/2021	34.05	32.61	27.28	22.94	31.09	26.79	18.06
	10/19/2021	34.79	34.58	29.23	31.48	38.32	33.01	22.39
Current week % change from the same week:								
	Last year	-18	8	14	30	49	49	30
	3-year avg. [2]	9	24	34	40	56	56	46
Rate[1]	November	478	482	469	383	441	441	360
	January	-	-	429	322	353	353	300

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-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

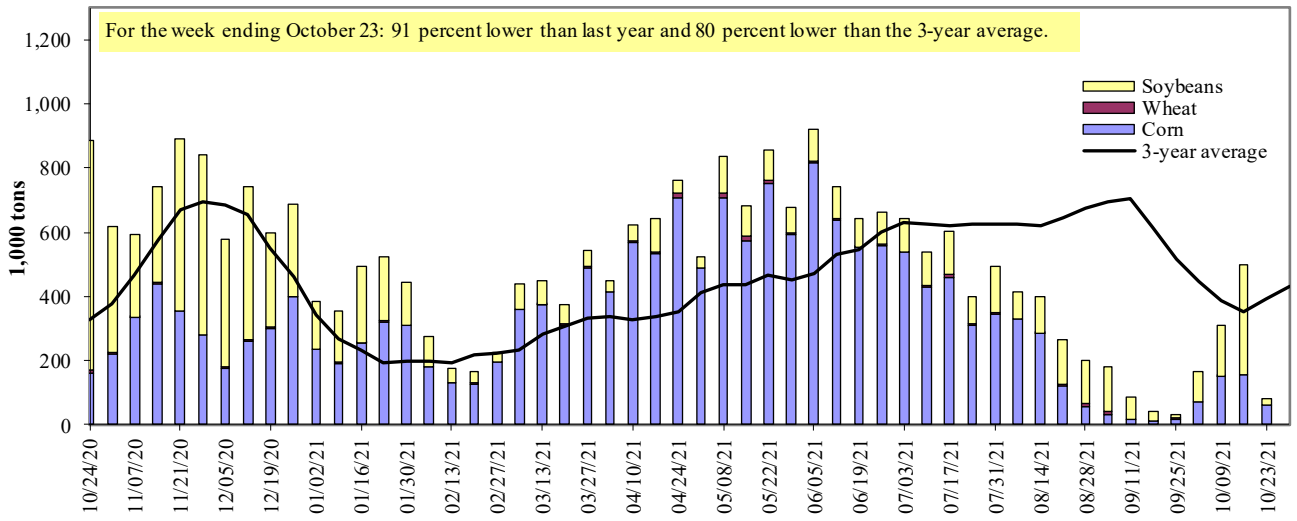
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



Map Credit: USDA, Agricultural Marketing Service

Figure 10

Barge movements on the Mississippi River[1] (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 10/23/2021	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	41	0	70	0	110
Winfield, MO (L25)	122	2	105	0	228
Alton, IL (L26)	130	2	105	2	238
Granite City, IL (L27)	169	2	134	3	307
Illinois River (La Grange)	61	0	19	2	81
Ohio River (Olmsted)	113	2	109	7	231
Arkansas River (L1)	0	7	32	0	39
Weekly total - 2021	282	10	275	10	577
Weekly total - 2020	256	31	794	35	1,116
2021 YTD[1]	20,186	1,480	7,264	240	29,169
2020 YTD[1]	14,610	1,588	12,569	160	28,926
2021 as % of 2020 YTD	138	93	58	150	101
Last 4 weeks as % of 2020[2]	104	50	47	30	64
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.

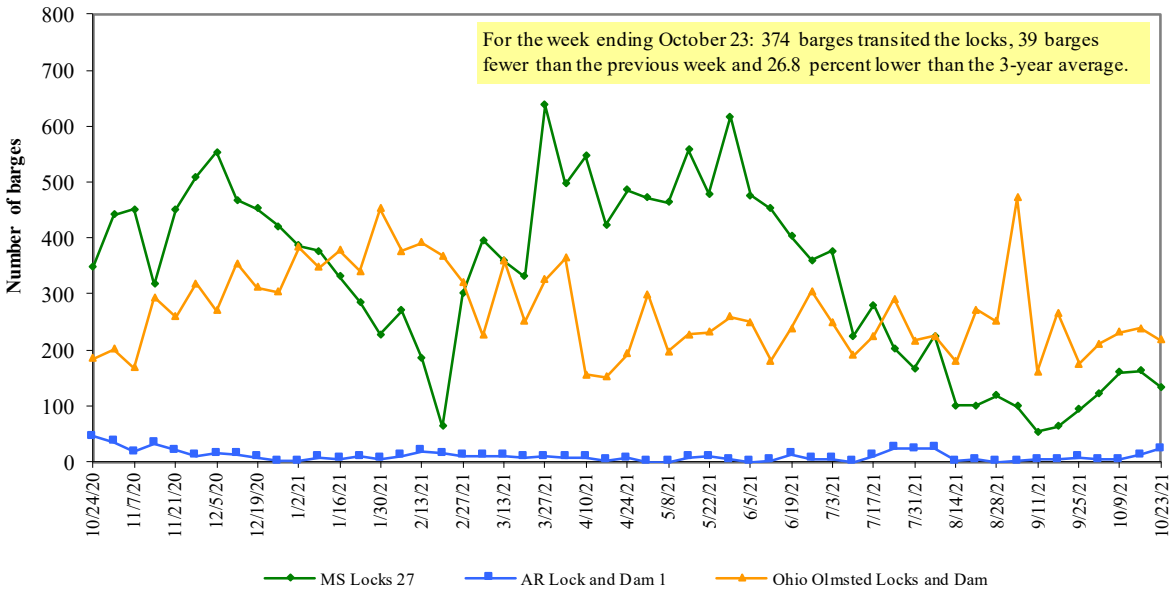
[2] As a percent of same period in 2020.

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

Source: U.S. Army Corps of Engineers.

Figure 11

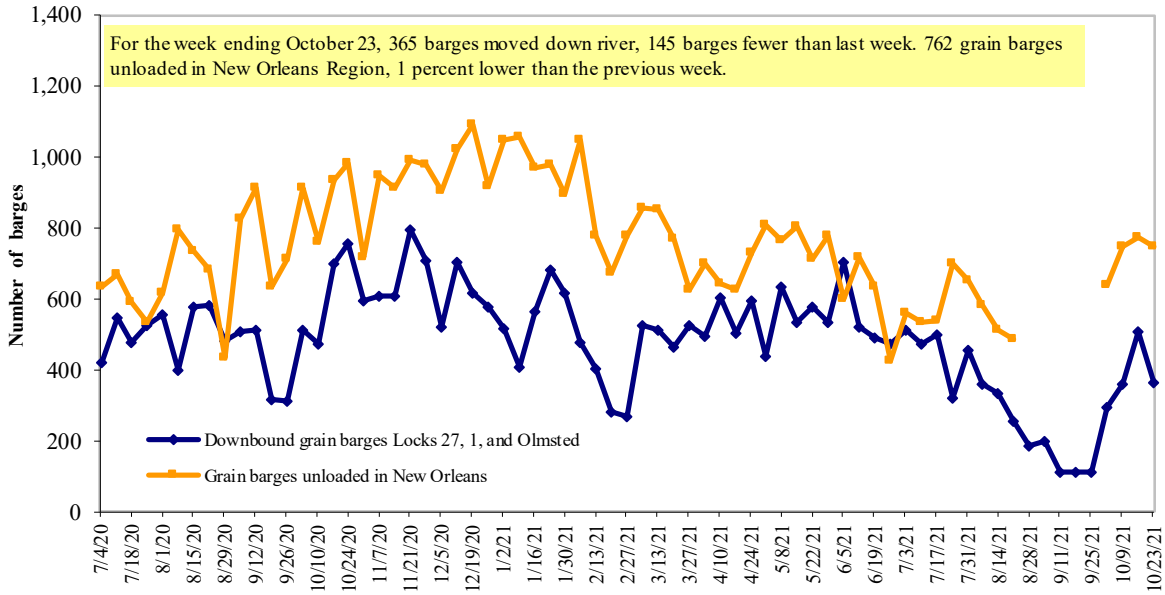
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 10/25/2021 (U.S. $/gallon)

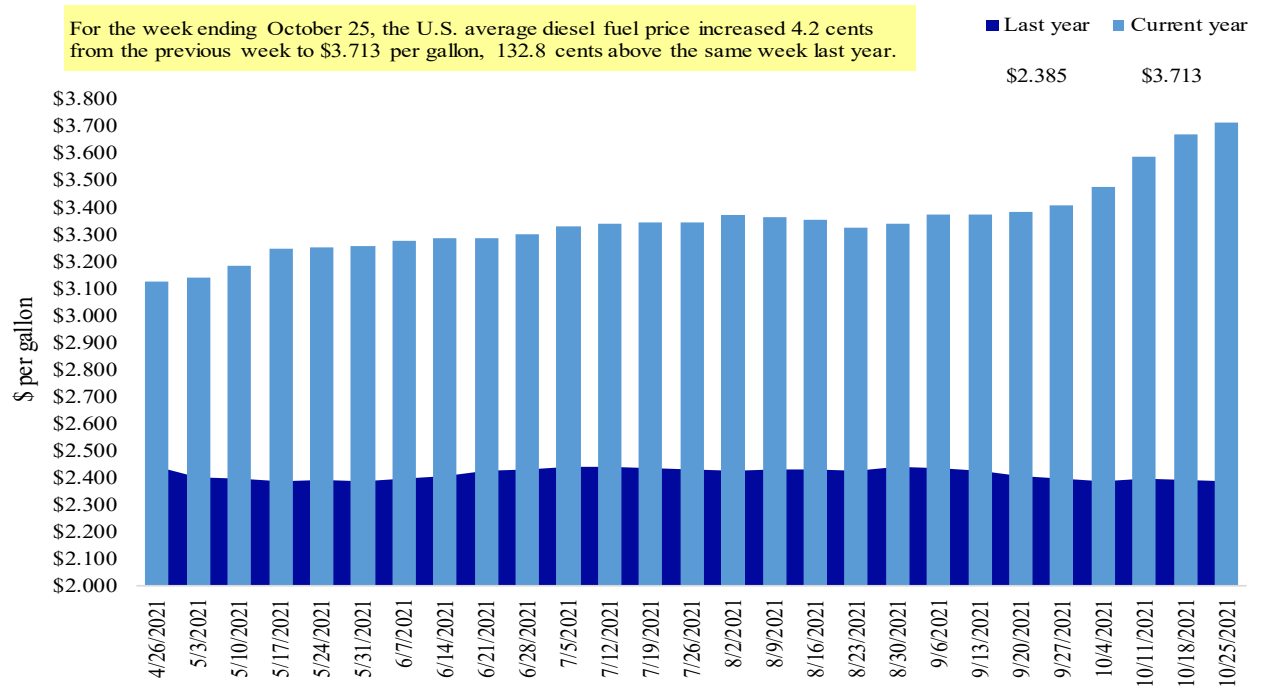
Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	3.704	0.049	1.243
	New England	3.626	0.071	1.052
	Central Atlantic	3.849	0.057	1.201
	Lower Atlantic	3.621	0.039	1.310
II	Midwest	3.632	0.017	1.370
III	Gulf Coast	3.483	0.061	1.337
IV	Rocky Mountain	3.779	0.047	1.455
V	West Coast	4.278	0.052	1.358
	West Coast less California	3.891	0.031	1.354
	California	4.600	0.070	1.365
Total	United States	3.713	0.042	1.328

[1]Diesel 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)

	Wheat						Corn	Soybeans	Total
For the week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export balances[1]									
10/14/2021	1,641	639	1,001	643	42	3,966	24,438	23,432	51,836
This week year ago	1,643	404	1,507	1,452	221	5,227	22,944	33,926	62,097
Cumulative exports-marketing year[2]									
2021/22 YTD	3,167	1,207	2,337	1,599	61	8,372	4,456	5,837	18,665
2020/21 YTD	4,144	879	2,905	1,940	322	10,190	5,391	11,423	27,004
YTD 2021/22 as % of 2020/21	76	137	80	82	19	82	83	51	69
Last 4 wks. as % of same period 2020/21*	95	160	63	41	25	73	105	68	82
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 importers[1] of U.S. corn

For the week ending 10/14/2021	Total commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2019-21
	1,000 mt -			
Mexico	7,453	5,260	42	14,817
Japan	2,182	3,950	(45)	11,082
China	11,926	10,549	13	7,920
Columbia	1,202	1,257	(4)	4,491
Korea	72	339	(79)	3,302
Top 5 importers	**22,835**	**21,354**	**7**	**41,613**
Total U.S. corn export sales	**28,894**	**28,335**	**2**	**53,145**
% of projected exports	45%	40%		
Change from prior week[2]	**1,273**	**1,832**		
Top 5 importers' share of U.S. corn export sales	79%	75%		78%
USDA forecast October 2021	**63,613**	**70,051**	**(9)**	
Corn use for ethanol USDA forecast, October 2021	**132,080**	**127,813**	**3**	

[1] Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; 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 (carryover plus accumulated export); yr. = year; avg. = average.

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

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers[1] of U.S. soybeans

For the week ending 10/14/2021	Total commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
				- 1,000 mt -
China	14,964	24,922	(40)	21,666
Mexico	1,967	2,430	(19)	4,754
Egypt	788	878	(10)	3,093
Indonesia	345	703	(51)	2,325
Japan	694	713	(3)	2,275
Top 5 importers	**18,757**	**29,647**	**(37)**	**34,113**
Total U.S. soybean export sales	**29,268**	**45,350**	**(35)**	**50,758**
% of projected exports	51%	73%		
change from prior week[2]	**2,878**	**2,226**		
Top 5 importers' share of U.S. soybean export sales	64%	65%		**67%**
USDA forecast, October 2021	**56,948**	**61,717**	**(8)**	

[1]Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2020/21; marketing year (MY) = Sep 1 - Aug 31.
[2]Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.
[3]FAS 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 importers[1] of all U.S. wheat

For the week ending 10/14/2021	Total Commitments[2] 2021/22 current MY	2020/21 last MY	% change current MY from last MY	Exports[3] 3-yr. avg. 2018-20
		1,000 mt -		- 1,000 mt -
Mexico	2,113	2,119	(0)	3,388
Philippines	1,880	2,228	(16)	3,121
Japan	1,271	1,452	(12)	2,567
Korea	749	858	(13)	1,501
Nigeria	1,406	750	87	1,490
China	848	1,538	(45)	1,268
Taiwan	500	675	(26)	1,187
Indonesia	59	606	(90)	1,131
Thailand	371	442	(16)	768
Italy	138	458	(70)	681
Top 10 importers	**9,335**	**11,124**	(16)	**17,102**
Total U.S. wheat export sales	**12,338**	**15,417**	(20)	**24,617**
% of projected exports	52%	57%		
change from prior week[2]	**362**	**367**		
Top 10 importers' share of U.S. wheat export sales	76%	72%		69%
USDA forecast, October 2021	**23,842**	**27,030**	(12)	

[1] Based on USDA, Foreign Agricultural Service(FAS) marketing year ranking reports for 2020/21; Marketing year (MY) = Jun 1 - May 31.
[2] Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.
[3] FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.
Note: A red number in parentheses indicates a negative number.
Source: USDA, Foreign Agricultural Service.

Table 16

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

Port regions	For the week ending 10/21/21	Previous week*	Current week as % of previous	2021 YTD*	2020 YTD*	2021 YTD as % of 2020 YTD	Last 4-weeks as % of: Last year	Last 4-weeks as % of: Prior 3-yr. avg.	2020 total*
Pacific Northwest									
Wheat	76	50	153	12,134	13,323	91	66	58	15,966
Corn	0	0	n/a	12,369	8,257	150	0	0	9,969
Soybeans	1,055	1,126	94	7,457	7,807	96	101	226	14,028
Total	**1,131**	**1,176**	**96**	**31,959**	**29,387**	**109**	**91**	**133**	**39,963**
Mississippi Gulf									
Wheat	23	35	66	2,684	3,192	84	139	110	3,422
Corn	339	850	40	33,864	23,688	143	99	111	28,781
Soybeans	721	934	77	14,881	24,160	62	54	72	38,013
Total	**1,084**	**1,819**	**60**	**51,429**	**51,040**	**101**	**70**	**87**	**70,215**
Texas Gulf									
Wheat	17	35	49	3,417	3,882	88	59	87	4,248
Corn	0	0	n/a	503	621	81	159	127	723
Soybeans	86	217	40	1,014	829	122	83	250	2,098
Total	**103**	**252**	**41**	**4,934**	**5,332**	**93**	**72**	**134**	**7,068**
Interior									
Wheat	29	7	394	2,495	1,756	142	110	88	2,263
Corn	188	178	106	7,946	7,048	113	119	125	8,683
Soybeans	229	187	122	4,814	5,501	88	84	97	7,274
Total	**445**	**372**	**120**	**15,255**	**14,305**	**107**	**101**	**109**	**18,220**
Great Lakes									
Wheat	3	23	15	369	698	53	71	61	891
Corn	0	0	n/a	94	54	174	n/a	0	111
Soybeans	52	55	95	195	523	37	92	96	1,111
Total	**55**	**77**	**72**	**658**	**1,276**	**52**	**85**	**77**	**2,113**
Atlantic									
Wheat	0	0	n/a	125	31	398	32	78	65
Corn	9	2	454	67	33	205	138	268	33
Soybeans	70	59	117	1,279	863	148	65	116	1,870
Total	**78**	**61**	**128**	**1,471**	**928**	**159**	**68**	**124**	**1,968**
U.S. total from ports*									
Wheat	148	149	99	21,224	22,881	93	73	72	26,854
Corn	536	1,030	52	54,842	39,701	138	101	100	48,301
Soybeans	2,214	2,579	86	29,640	39,685	75	74	117	64,394
Total	**2,897**	**3,758**	**77**	**105,707**	**102,268**	**103**	**80**	**105**	**139,548**

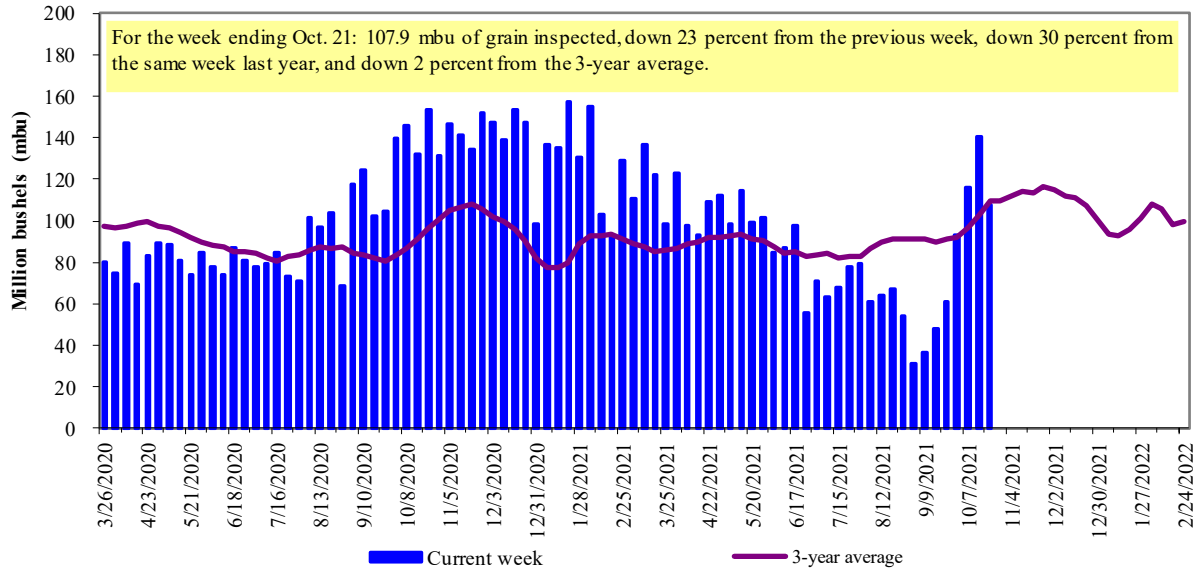
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

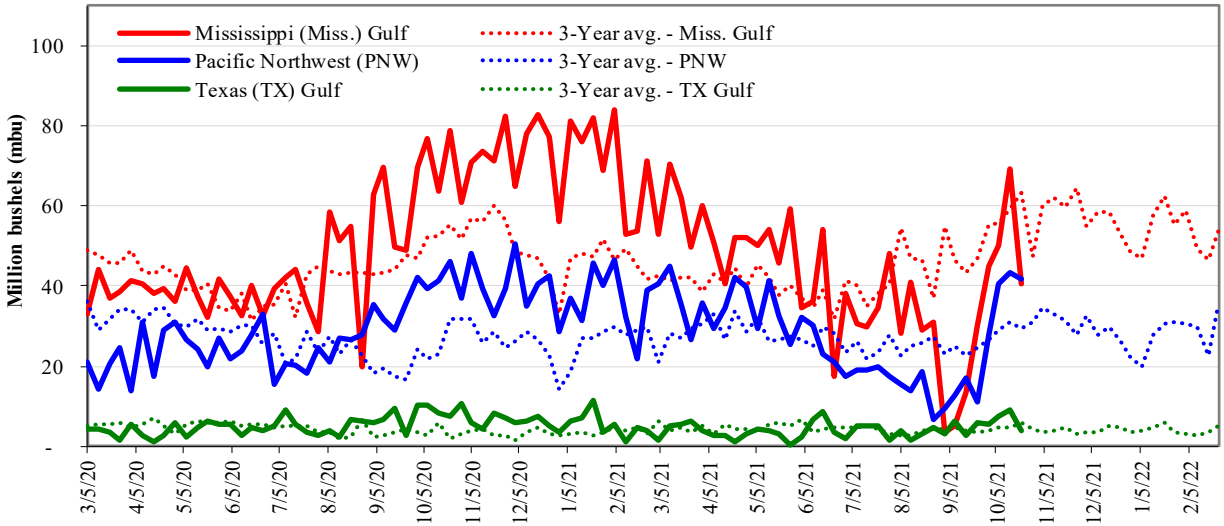


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



Week ending 10/21/21 inspections (mbu):	
MS Gulf:	40.7
PNW:	41.6
TX Gulf:	3.8

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last wk:	down 41	down 59	down 43	down 4
Last Year (same wk):	down 48	down 50	down 48	down 10
3-yr avg. (4-wk. mov. Avg):	down 30	down 22	down 30	up 44

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

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

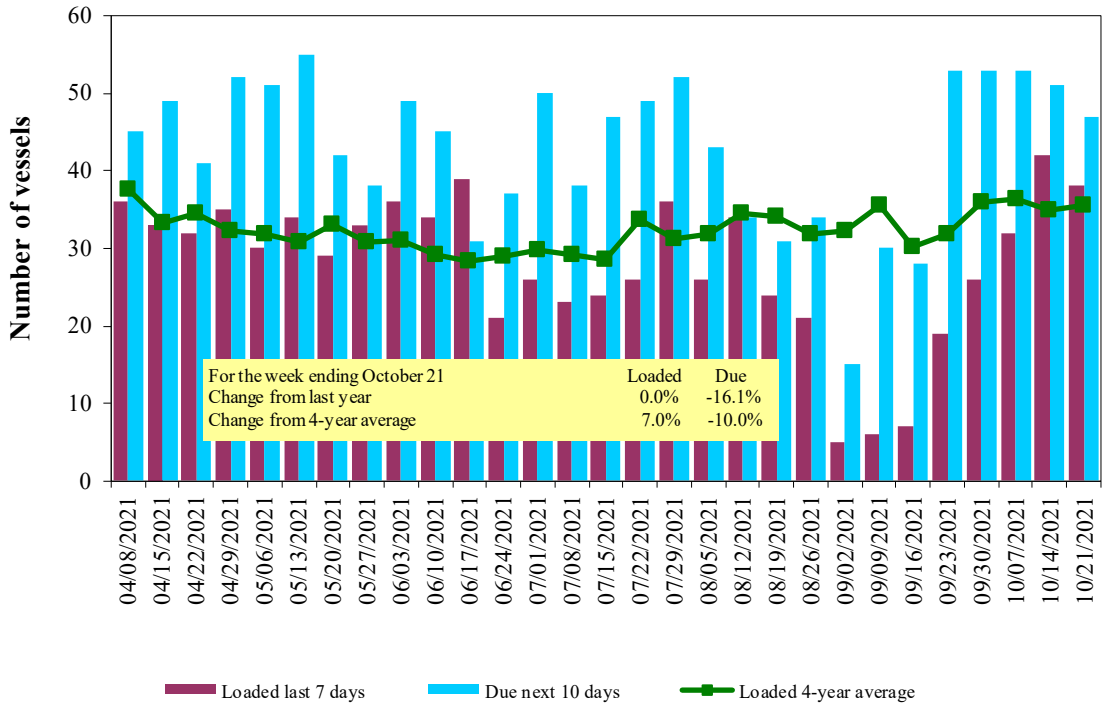
	Gulf			Pacific Northwest
Date	In port	Loaded 7-days	Due next 10-days	In port
10/21/2021	39	38	47	16
10/14/2021	32	42	51	11
2020 range	(22…60)	(23...46)	(34...68)	(7…24)
2020 average	37	33	49	15

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

Source: USDA, Agricultural Marketing Service.

Figure 16

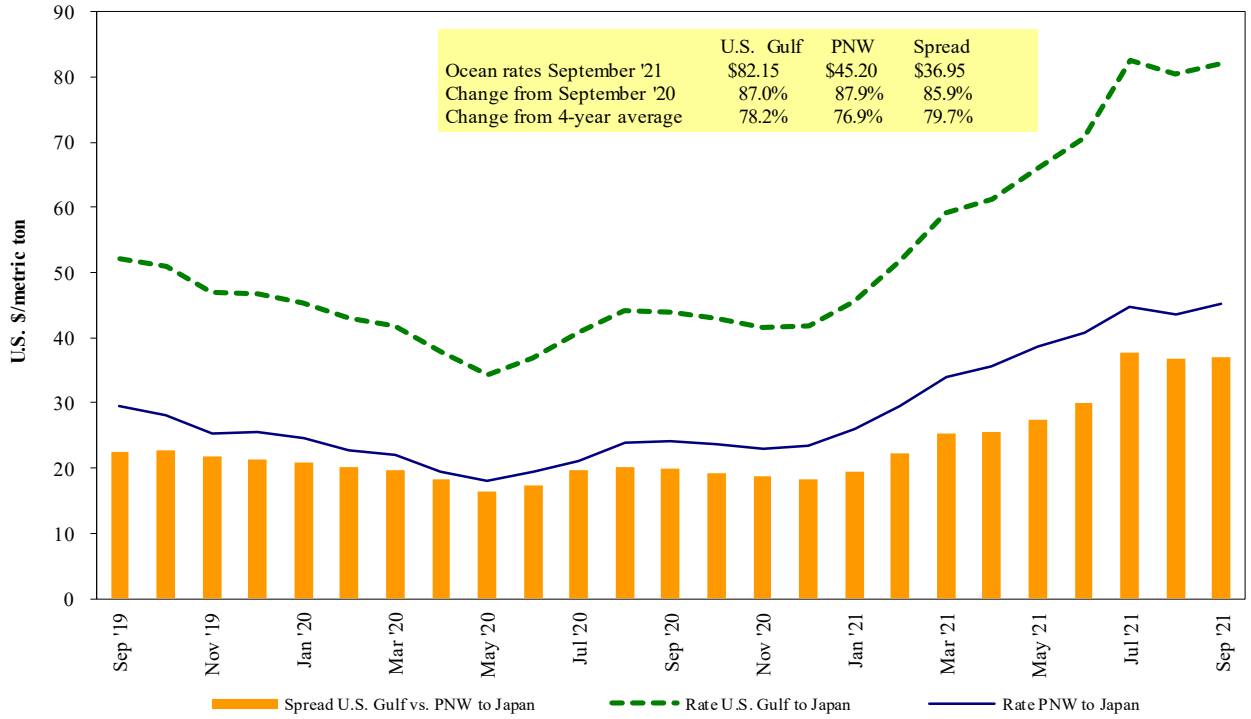
U.S. Gulf[1] vessel loading activity



[1]U.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 10/23/2021

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*
U.S. Gulf	S. Korea	Heavy grain	Dec 1/10, 2021	51,000	940.00
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	55,000	65.50
River Plate	South Korea	Corn	Oct 21, 2021	67,000	79.80

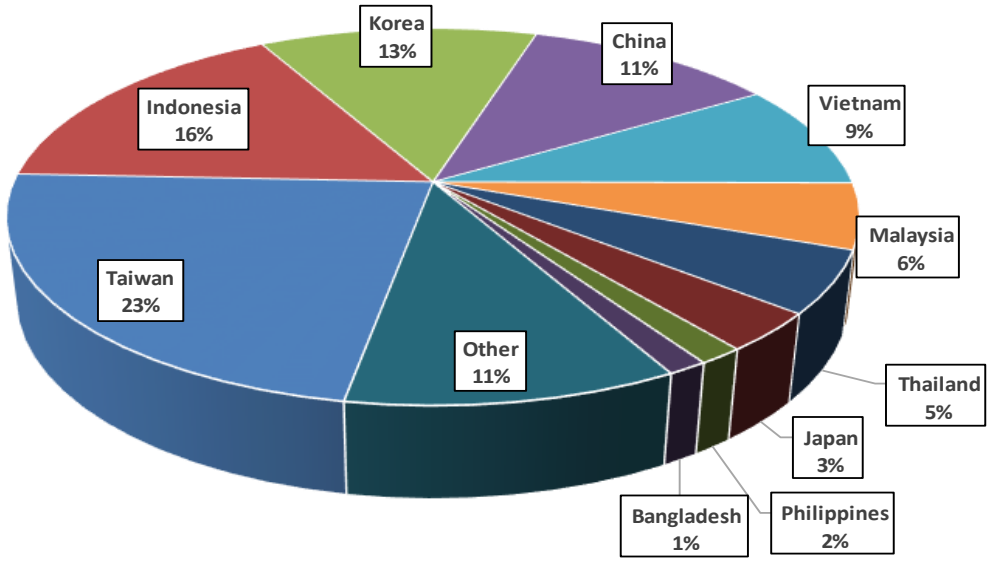
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

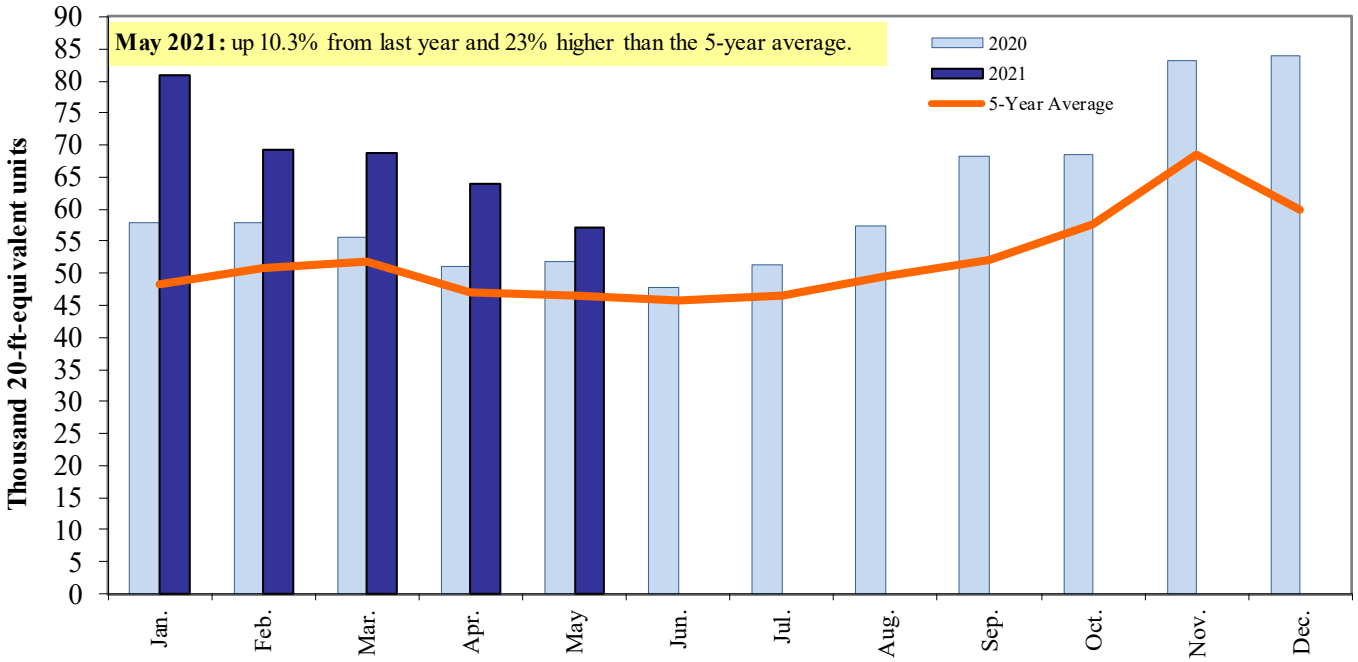
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2021



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.

Contacts and Links

Coordinators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Maria Williams	maria.williams@usda.gov	(202) 690 - 4430
Bernadette Winston	bernadette.winston@usda.gov	(202) 690 - 0487
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Grain Transportation Indicators		
Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
Rail Transportation		
Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690 - 1144
Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690 - 3244
Barge Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Truck Transportation		
April Taylor	april.taylor@usda.gov	(202) 720 - 7880
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Matt Chang	matt.chang@usda.gov	(202) 720 - 0299
Grain Exports		
Johnny Hill	johnny.hill@usda.gov	(202) 690 - 3295
Kranti Mulik	kranti.mulik@usda.gov	(202) 756 - 2577
Ocean Transportation		
Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720 - 0119
April Taylor (Container movements)	april.taylor@usda.gov	(202) 720 - 7880
Editor		
Maria Williams	maria.williams@usda.gov	(202) 690-4430

Subscription Information: Please sign up to receive regular email announcements of the latest *GTR* issue by entering your email address **here** and selecting your preference to receive Transportation Research and Analysis. For any other information, you may contact us at **GTRContactUs@usda.gov**.

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