

# Grain Transportation Report

A weekly publication of the  
Transportation and Marketing Programs/Transportation Services Division  
[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

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July 2, 2009

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## WEEKLY HIGHLIGHTS

### Large Corn Crop Planted, Record Soybean Acreage Reported

USDA's Acreage Report released June 30 shows 87.3 million acres of planted corn, the second-largest corn acreage in more than 60 years (2007 had 93.6 million acres). Farmers sowed a record-high 77.5 million acres to soybeans. Nebraska farmers planted 600,000 more acres of corn than last year, while planting 400,000 acres less soybeans. Large increases for corn acres were reported in Iowa (400,000), Missouri (300,000), South Dakota (250,000), and Illinois (200,000). The States with the largest soybean acre increases included Kansas (300,000), North Dakota (250,000), South Dakota (250,000), and Missouri (200,000). North Dakota will plant 650,000 less acres of corn this year due in part to the flooding this spring. The potential for a large crop in the western corn belt implies the need for more reliance on truck and rail to move this year's harvest. However, a strong export demand in the second half of the year will increase the need for barge services to transport grain to export facilities.

### Ship Owners Ask for Extension of Panama Canal Rate Cuts; Canal Expansion Progresses

During the 18<sup>th</sup> Asian Ship Owners' Forum (ASF) held May 25-27 in Tainan, Taiwan, members called on the Panama Canal Authority (ACP) to extend its temporary fee cuts. According to a statement released by the ASF on June 2, the owners noted that the effective period of the reduction expires on September 30<sup>th</sup>. However, they urged the ACP to "institute a more meaningful reduction of a longer duration. On April 30, ACP introduced some temporary measures designed to reduce transit costs for clients that were financially pressed by the global economic crisis (**GTR, 5/7/09**). The ASF membership together controls about 50% of the world merchant fleet. Meanwhile, the first dry excavation stage of the Canal expansion is almost 90 percent complete and the second part of the contract is 60 percent complete. The third phase is still in the initial stage; the expansion projects are scheduled to be completed in 2014 or 2015.

### Total Grain Inspections Down; PNW Rebounds

For the week ending June 25, **total grain** (wheat, corn, soybeans) inspected at major export regions reached 1.28 million metric tons (mmt), down 21 percent from the previous week and 32 percent below last year this time. Total inspections of each of the major grains decreased from the previous week. Despite the drop in total grain inspections, Pacific Northwest (PNW) inspections (.431 mmt) increased 32 percent from the previous week. Increased inspections in the PNW were driven by a boost in China's demand for soybeans. Mississippi and Texas Gulf inspections receded from the past week.

## Snapshots by Sector

### **Rail**

U.S. railroads originated 17,327 **carloads of grain** during the week ending June 20, up 1 percent from the previous week, down 23 percent from the same week last year, and 21 percent lower than the 3-year average.

During the week ending June 27, average July **secondary railcar bids/offers** were \$4 above tariff for non-shuttle, \$6 higher than last week. Shuttle rates were \$103 under tariff, \$69 higher than last week.

### **Ocean**

During the week ending June 25, 31 ocean-going **grain vessels** were loaded in the Gulf, down 34 percent from last year. Fifty-six **vessels** are expected to be loaded in the U.S. Gulf within the next 10 days, down 32 percent from last year.

As of June 26, the cost of shipping grain from the Gulf to Japan was \$59 per mt, down 5 percent from the previous week. The rate from the Pacific Northwest to Japan was \$31 per mt, up 11 percent from the previous week.

## Basis and Transportation Cost Primer

For Agriculture, and especially for grain, *basis* is the difference between the futures price for a commodity and the local cash price offered by grain buyers. The futures price used depends on the commodity. For some types of wheat, the futures price is from the Kansas City Board of Trade or the Minneapolis Grain Exchange. For corn, soybeans, and other types of wheat, the Chicago Board of Trade (CBOT) is used. Basis is quoted in cents per bushel as the difference between prices in two locations. The futures price at the CBOT is subtracted from the local buyers' price.<sup>1</sup> For example:

$$\begin{array}{rcl} \text{Local Price} & \text{Futures Price} & \text{Basis} \\ \$10.8425 & - \$12.0125 & = -117 \text{ cents} \end{array}$$

The basis usually reflects the cost to market grain at one location as compared to the cost to market it at another. Basis levels vary around the county and the globe because of differences in transportation rates, capacity availability, local supply and demand, and the competition among buyers.

For daily buying transactions, the futures price most commonly used to calculate basis is the "nearby" month. The nearby month is the contract month (the month in which delivery is expected) closest to the month you are expecting to sell the grain. For example, the nearby month for June corn and soybeans is the July CBOT contract month. In July, it will continue to be the July contract month until August, when it will be the September contract month.

### Costs Associated with Basis

The costs associated with marketing grain between two locations (basis) can be divided into fixed and variable costs. They are composed of these costs:

#### Fixed Cost<sup>2</sup>

- Transportation (from beginning point to marketing point, such as the crusher or export loading facility)
- Weighing and inspection charges
- Handling (usually elevator charges, but may include cleaning and drying costs)

#### Variable Costs<sup>2</sup>

- Storage costs (insurance, shrinkage, etc.)
- Interest (also called *opportunity cost*, from time of purchase until marketing point delivery)
- Administration, hedging costs, and profit margin for the grain buyer

#### Price or Cost per bu.

	\$12.01	CBOT Futures Price
-	0.89	Transportation
-	0.11	Weighing and Inspection Charges
-	0.04	Handling
-	0.07	Storage Costs
-	0.01	Interest
-	0.05	Administration, Hedging, etc
=	\$10.8425	Local Price Offered by Buyer

Note: Costs are for illustrative purposes only, and may not represent actual industry figures

Transportation is usually the largest cost associated with basis. Increases in transportation costs cause the basis to widen. Transportation costs are greater—and basis wider—the farther a shipper is from the buyer's terminal point (i.e. a processor or export destination). This is shown in Figures 1 and 2 below. As Chicago is frequently a terminal point, the farther away a point is from Chicago on the map, the wider the basis. Costs such as fuel, insurance, and equipment widen the transportation portion of basis. Congestion may also play a key role in widening basis. As congestion increases for any transportation mode, the fixed costs of the transportation company must be recouped on fewer grain movements, and consequently transportation prices rise.

<sup>1</sup> Depending on market conditions, basis may be either over or under the CBOT price.

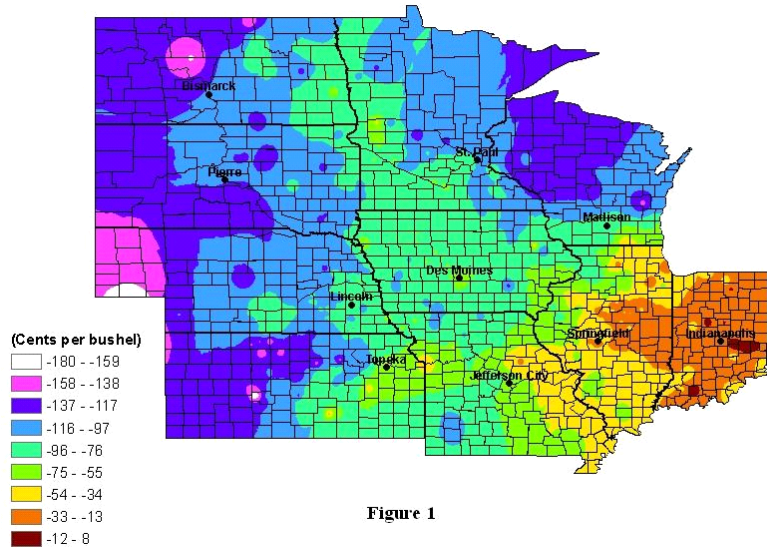
<sup>2</sup> "Understanding the Basis," Saskatchewan Ministry of Agriculture, August 2008 Fact Sheet.

**Basis Level Fluctuation:** Basis levels around the country change from day to day as local market prices and futures prices fluctuate. Local market prices fluctuate frequently on supply and the demand from processors and exporters. Basis typically widens (greater difference between local and futures price) as the supply of grain becomes more available, and vice versa, as supply becomes less available. Therefore, basis can be thought of as a signal to sell, or as a signal to the producer and small elevators to hold grain. Basis levels are usually at their widest during the harvest; supplies are abundant and the transportation system may be congested. Conversely, during and after the planting season, towards the end of the marketing year, the basis is narrowest as supplies dwindle but the new crop is too distant to wait for.

In Figures 1 and 2<sup>1</sup>, basis level fluctuations can be seen by comparing the same day in 2008 and 2009. These figures show basis levels at elevators and terminal points overlaid on a map of the Midwest. Each color represents a range of basis levels. The dark red is the narrowest basis, usually over the CBOT price. White represents the widest basis, typically \$1.00 or more under the CBOT price. In Figure 1, from June 16th 2008, the widest soybean basis in the Midwest was between 180 cents and 159 cents per bushel below the July 2008 futures price. In Figure 2, from June 16 2009, the widest basis in the Midwest was between 136 cents and 117 cents per bushel, a roughly 24 percent narrowing of the basis level from last year. These maps show that not only will the basis level change, but the geographic location of those levels will also change with time.

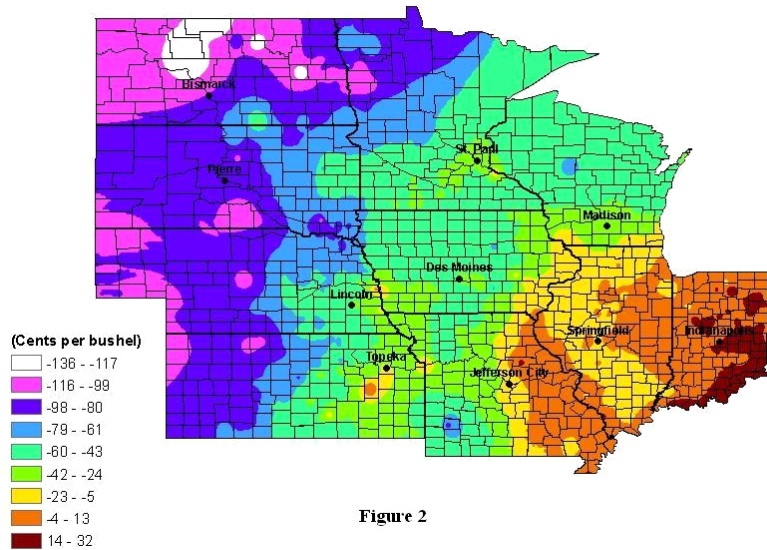
There could be several reasons why the basis narrowed as it did. The narrowing of the basis could be because soybeans are in much tighter supply in 2009 than in 2008. According to the June 30, National Agricultural Statistics Service Grain Stocks report, soybeans stored in all positions on June 1, 2009 were down 12 percent from June 1, 2008. This type of analysis would indicate that soybean buyers are aware of the short supply and are bidding for grain. Transportation changes may also have played a role in the basis narrowing. In 2009, fuel costs and surcharge levels for truck and rail are significantly below last year's levels (See [GTR Figures 7 and 13](#)). Lower transportation costs narrows the local basis to the futures price. Everything else being equal, as grain costs less per bushel to transport, producers receive a closer price to the CBOT futures price. [Daniel.Nibarger@usda.gov](mailto:Daniel.Nibarger@usda.gov)

**June 16, 2008 Soybean Basis**  
Basis calculated from CBOT July 2008 futures price of \$15.34 per bushel



**Figure 1**

**June 16, 2009 Soybean Basis**  
Basis calculated from CBOT July 2009 futures price of \$12.0125 per bushel



**Figure 2**

<sup>1</sup> Reprinted with permission from: The Center for Agricultural and Rural Development (CARD), Iowa State University.

# Grain Transportation Indicators

Table 1

**Grain Transport Cost Indicators<sup>1</sup>**

Week ending	Truck	Rail <sup>2</sup>	Barge	Ocean	
				Gulf	Pacific
07/01/09	175	99	146	264	220
06/24/09	176	94	153	277	248

<sup>1</sup>Indicator: Base year 2000 = 100; Weekly updates include truck = diesel (\$/gallon); rail = nearby secondary rail market (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); and ocean = routes to Japan (\$/metric ton)

<sup>2</sup>The rail indicator is not an index. It is the difference between the nearby secondary rail market bid for this week and the average bid for year 2000 (+) 100.

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

**Market Update: U.S. Origins to Export Position Price Spreads (\$/bushel)**

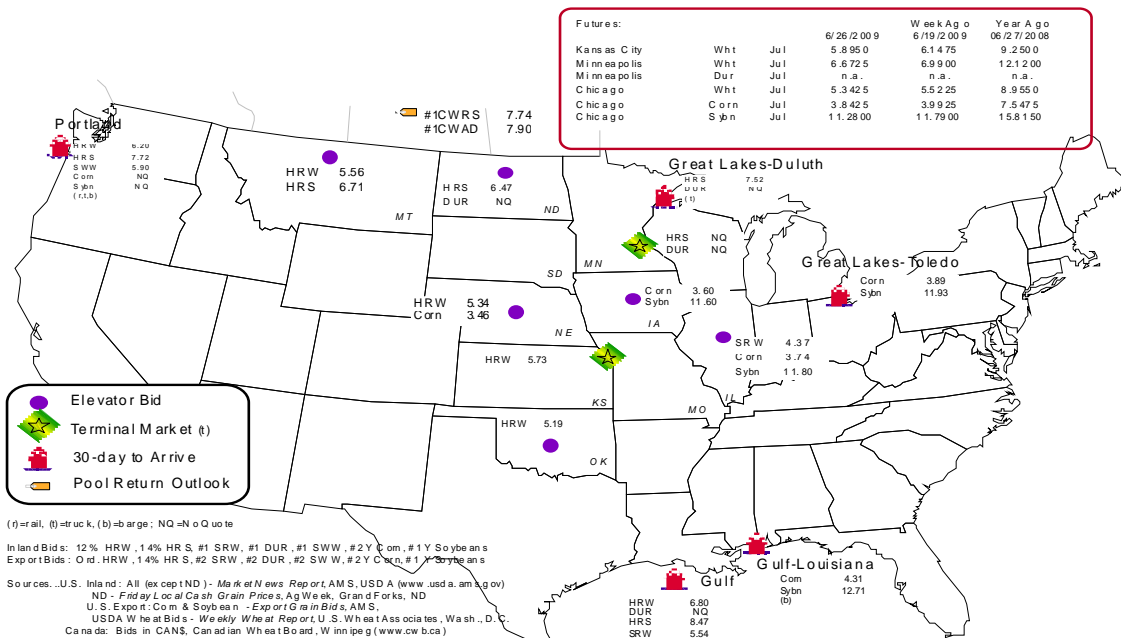
Commodity	Origin--Destination	6/26/2009	6/19/2009
Corn	IL--Gulf	-0.57	-0.53
Corn	NE--Gulf	-0.85	-0.82
Soybean	IA--Gulf	-1.11	-0.95
HRW	KS--Gulf	-1.07	-0.95
HRS	ND--Portland	-1.25	-1.30

Note: nq = no quote

Source: Transportation & Marketing Programs/AMS/USDA

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)<sup>1</sup>

Week ending	Mississippi		Cross-Border	Pacific	Atlantic &	Total
	Gulf <sup>2</sup>	Texas Gulf	Mexico	Northwest	East Gulf	
6/24/2009 <sup>p</sup>	244	400	443	3,086	329	4,502
6/17/2009 <sup>f</sup>	n/a	666	729	1,887	455	3,737
2009 YTD	13,272	21,316	19,707	77,685	12,968	144,948
2008 YTD	31,954	57,987	14,722	138,979	20,272	263,914
2009 YTD as % of 2008 YTD	42	37	134	56	64	55
Last 4 weeks as % of 2008 <sup>3</sup>	30	35	142	38	244	47
Last 4 weeks as % of 4-year avg. <sup>3</sup>	28	38	115	50	227	55
Total 2008	68,768	107,542	37,491	255,852	33,028	502,681
Total 2007	62,169	113,730	40,962	227,970	31,369	476,200

<sup>1</sup> Data is incomplete as it is voluntarily provided; <sup>2</sup> Mississippi Gulf data back to January, 2004 from several new sources has been added resulting in large increases in the numbers reported; <sup>3</sup> Compared with same 4-weeks in 2007 and prior 4-year average.

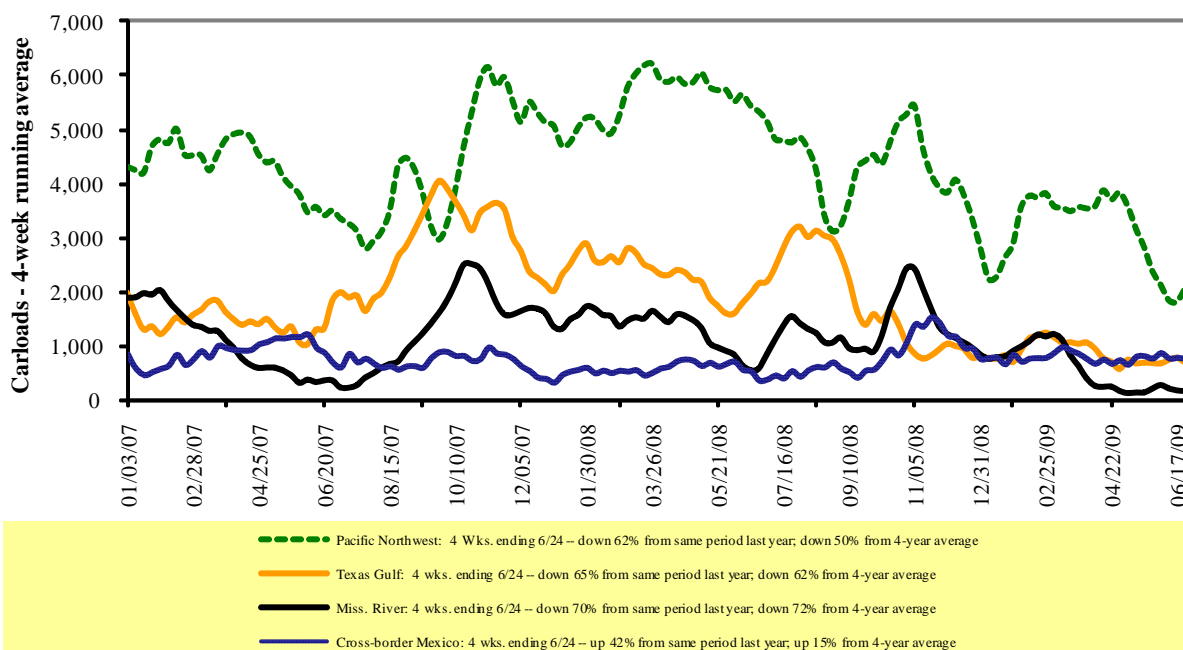
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 35 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

### Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

Table 4

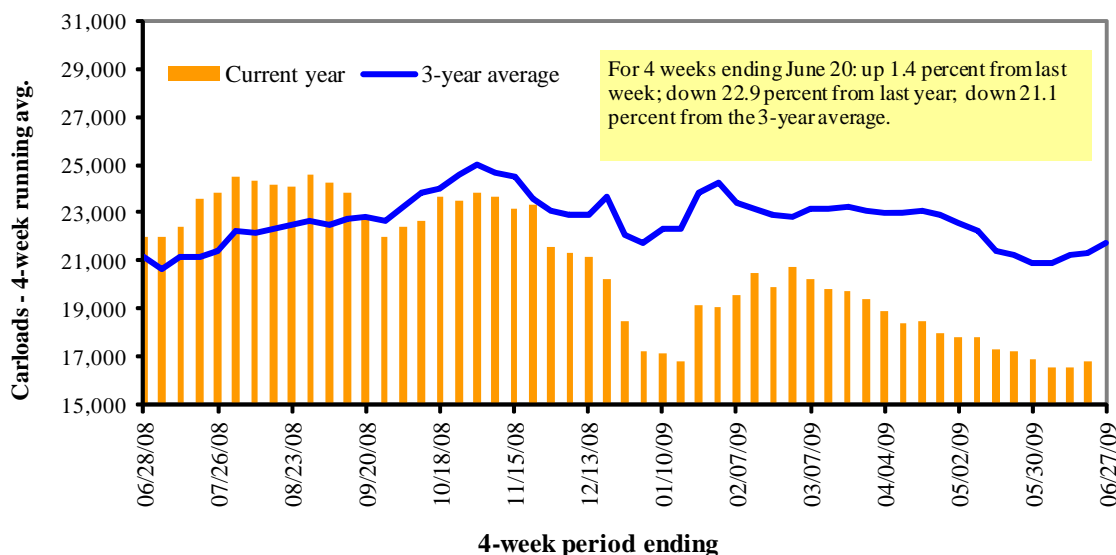
**Class I Rail Carrier Grain Car Bulletin (grain carloads originated)**

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
06/20/09	2,012	2,775	7,262	616	4,662	17,327	3,984	6,251
This week last year	2,106	3,633	9,832	597	6,004	22,172	3,503	3,113
2009 YTD	52,362	62,239	201,694	16,739	111,596	444,630	98,511	128,466
2008 YTD	69,519	74,863	267,826	16,863	156,554	585,625	108,408	101,769
2009 YTD as % of 2008 YTD	75	83	75	99	71	76	91	126
Last 4 weeks as % of 2008 <sup>1</sup>	79	82	72	105	74	76	104	132
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	67	86	76	115	82	79	100	128
Total 2008	136,143	162,177	573,285	37,822	323,104	1,232,531	226,849	220,714

<sup>1</sup>As a percent of the same period in 2008 and the prior 3-year average. YTD = year-to-date.

Source: Association of American Railroads (www.aar.org)

Figure 3

**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

**Rail Car Auction Offerings<sup>1</sup> (\$/car)<sup>2</sup>**

Week ending	Delivery period						
	Jul-09	Jul-08	Aug-09	Aug-08	Sep-09	Sep-08	Oct-09
<b>6/27/2009</b>							
BNSF <sup>3</sup>							
COT grain units	no offer	47	0	no offer	0	185	0
COT grain single-car <sup>5</sup>	no offer	no offer	4	200 . . 244	0 . . 1	109 . . 250	no bids
UP <sup>4</sup>							
GCAS/Region 1	no bids	no bids	no bids	1	no bids	no offer	no offer
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no offer	no offer

<sup>1</sup>Auction offerings are for single-car and unit train shipments only.

<sup>2</sup>Average premium/discount to tariff, last auction

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

<sup>4</sup>UP - GCAS = 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.

<sup>5</sup>Range is shown because average is not available. Not available = n/a.

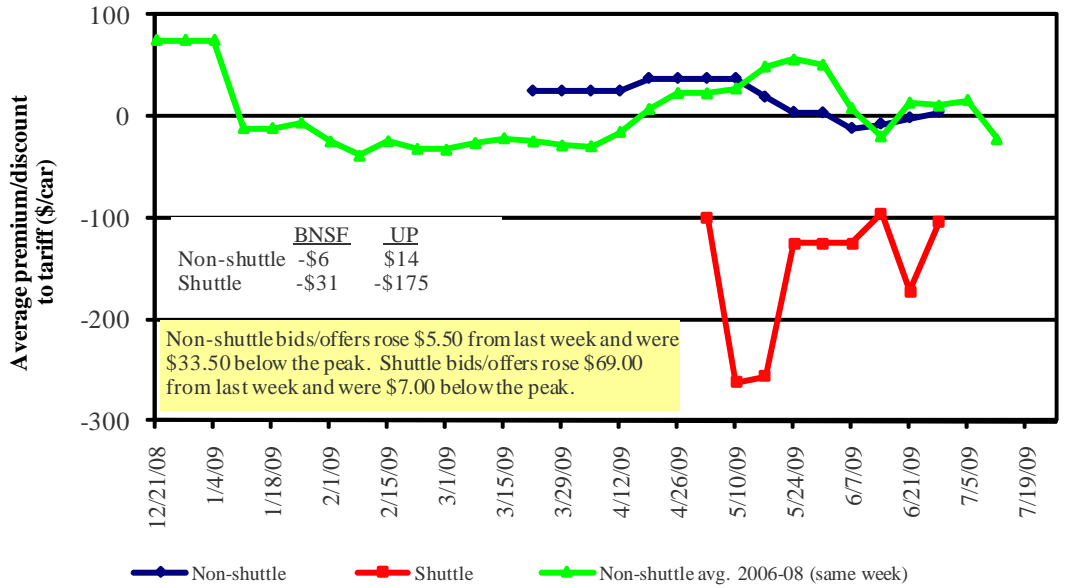
Source: Transportation & Marketing Programs/AMS/USDA.

Rail service may be ordered directly from the railroad via **auction** for guaranteed service, or via tariff for non-guaranteed service, or through the secondary railcar market.

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

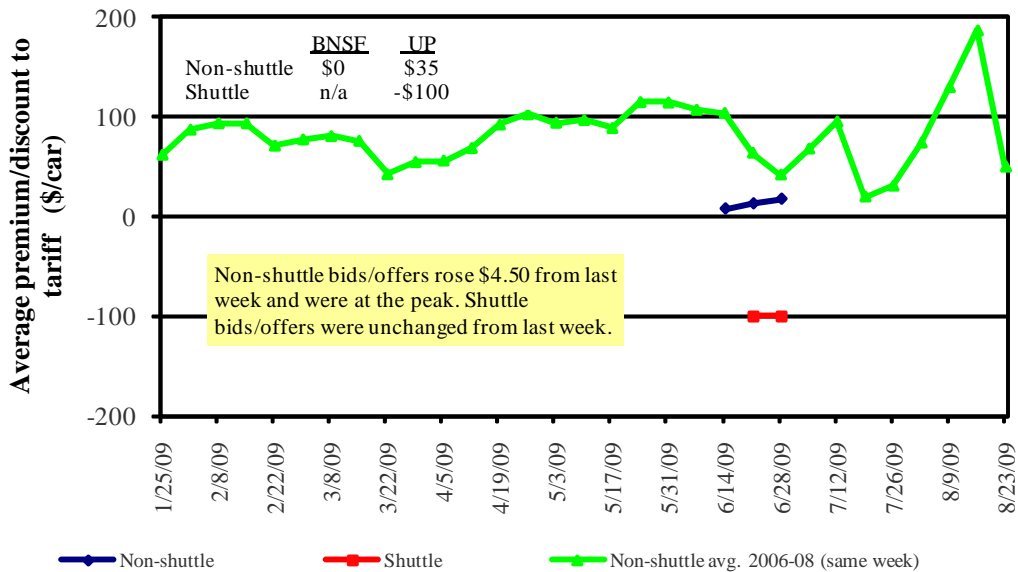
**Bids/Offers for Railcars to be Delivered in July 2009, Secondary Market**



Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

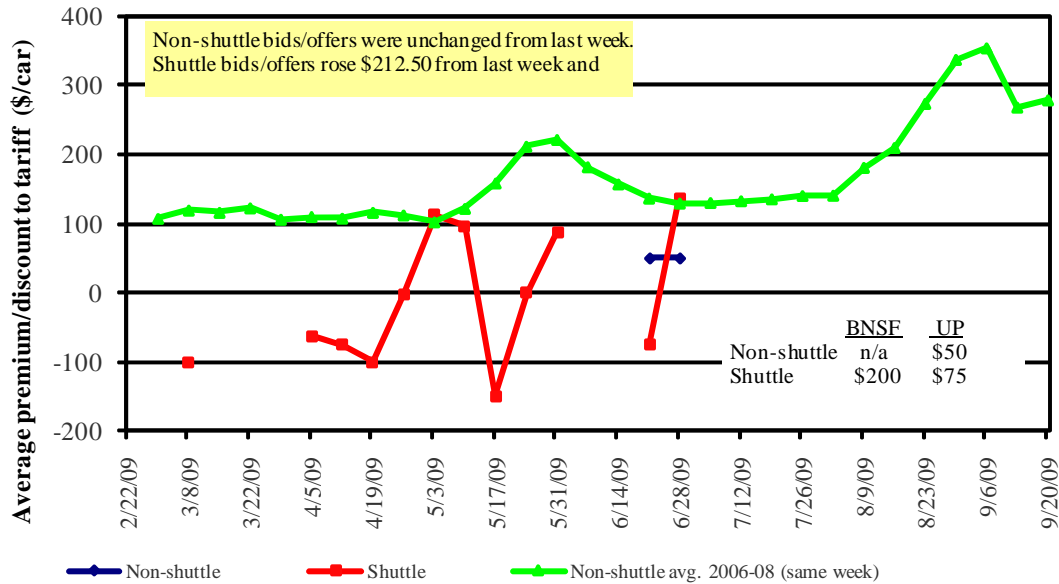
**Bids/Offers for Railcars to be Delivered in August 2009, Secondary Market**



Non-shuttle bids include unit-train and single-car bids. n/a = not available.  
 Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

### Bids/Offers for Railcars to be Delivered in September 2009, Secondary Market



Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Table 6

### Weekly Secondary Rail Car Market (\$/car)<sup>1</sup>

Week ending	Delivery period					
	Jul-09	Aug-09	Sep-09	Oct-09	Nov-09	Dec-09
<b>6/27/2009</b>						
<b>Non-shuttle</b>						
BNSF-GF	-6	0	n/a	n/a	n/a	n/a
Change from last week	11	n/a	n/a	n/a	n/a	n/a
Change from same week 2008	-74	-180	n/a	n/a	n/a	n/a
UP-Pool	14	35	50	n/a	n/a	n/a
Change from last week	0	22	0	n/a	n/a	n/a
Change from same week 2008	-90	-53	-44	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	-31	n/a	200	n/a	0	n/a
Change from last week	94	n/a	n/a	n/a	0	n/a
Change from same week 2008	144	n/a	n/a	n/a	n/a	n/a
UP-Pool	-175	-100	75	n/a	0	n/a
Change from last week	44	0	150	n/a	0	n/a
Change from same week 2008	-25	n/a	n/a	n/a	n/a	n/a

<sup>1</sup>Average premium/discount to tariff, \$/car-last week

<sup>2</sup>Shuttle bids are a new data series; prior to this we provided only non-shuttle rates.

Note: Bids listed are market INDICATORS only & are NOT guaranteed prices,

n/a = not available; GF = guaranteed freight; Pool = guaranteed pool

Sources: Transportation and Marketing Programs/AMS/USDA

Data from Atwood/ConAgra, Harvest States Co-op, James B. Joiner Co., Tradewest Brokerage Co.



Table 7

**Tariff Rail Rates for Unit and Shuttle Train Shipments<sup>1</sup>**

Effective date:		Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>3</sup>
6/1/2009	metric ton					bushel <sup>2</sup>		
<b><u>Unit train<sup>1</sup></u></b>								
Wheat	Chicago, IL	Albany, NY	\$2,522	\$0	\$27.80	\$0.76	-5	
	Kansas City, MO	Galveston, TX	\$2,528	\$0	\$27.87	\$0.76	-12	
	South Central, KS	Galveston, TX	\$3,395	\$176	\$39.36	\$1.07	2	
	Minneapolis, MN	Houston, TX	\$3,539	\$356	\$42.93	\$1.17	-8	
	St. Louis, MO	Houston, TX	\$3,305	\$0	\$36.43	\$0.99	2	
	South Central, ND	Houston, TX	\$5,268	\$395	\$62.43	\$1.70	7	
	Minneapolis, MN	Portland, OR	\$3,940	\$432	\$48.19	\$1.31	-14	
	South Central, ND	Portland, OR	\$3,940	\$355	\$47.34	\$1.29	-11	
	Northwest, KS	Portland, OR	\$4,970	\$473	\$59.99	\$1.63	-7	
	Chicago, IL	Richmond, VA	\$2,557	\$53	\$28.76	\$0.78	-7	
Corn	Chicago, IL	Baton Rouge, LA	\$3,128	\$0	\$34.48	\$0.88	-15	
	Council Bluffs, IA	Baton Rouge, LA	\$3,223	\$0	\$35.53	\$0.90	-9	
	Kansas City, MO	Dalhart, TX	\$3,284	\$128	\$37.61	\$0.96	-4	
	Minneapolis, MN	Portland, OR	\$3,609	\$432	\$44.54	\$1.13	-12	
	Evansville, IN	Raleigh, NC	\$3,008	\$51	\$33.72	\$0.86	-3	
	Columbus, OH	Raleigh, NC	\$2,897	\$45	\$32.43	\$0.82	-2	
	Council Bluffs, IA	Stockton, CA	\$5,390	\$467	\$64.56	\$1.64	-11	
	Chicago, IL	Baton Rouge, LA	\$3,178	\$0	\$35.03	\$0.95	-14	
Soybeans	Council Bluffs, IA	Baton Rouge, LA	\$3,192	\$0	\$35.19	\$0.96	-11	
	Minneapolis, MN	Portland, OR	\$3,910	\$432	\$47.86	\$1.30	-19	
	Evansville, IN	Raleigh, NC	\$3,008	\$51	\$33.72	\$0.92	-3	
	Chicago, IL	Raleigh, NC	\$3,608	\$64	\$40.48	\$1.10	-5	
	<b><u>Shuttle Train</u></b>							
Wheat	St. Louis, MO	Houston, TX	\$2,642	\$0	\$29.12	\$0.79	-11	
	Minneapolis, MN	Portland, OR	\$3,540	\$432	\$43.78	\$1.19	-17	
Corn	Fremont, NE	Houston, TX	\$2,520	\$261	\$30.66	\$0.78	-13	
	Minneapolis, MN	Portland, OR	\$3,348	\$432	\$41.67	\$1.06	-17	
Soybeans	Council Bluffs, IA	Houston, TX	\$2,787	\$253	\$33.51	\$0.91	-9	
	Minneapolis, MN	Portland, OR	\$3,502	\$432	\$43.36	\$1.18	-17	

<sup>1</sup>A unit train refers to shipments of at least 52 cars. Shuttle train rates are available for qualified shipments of 75-110 cars that meet railroad efficiency requirements.

<sup>2</sup>Approximate load per car = 100 short tons (90.72 metric tons): corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.cpr.ca, www.csx.com, www.uprr.com

Table 8

**Tariff Rail Rates for U.S. Bulk Grain Shipments to Mexico**

Effective date: 6/1/2009

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel	Tariff plus surcharge per:		Percent change Y/Y <sup>3</sup>
				surcharge per car	metric ton	bushel <sup>2</sup>	
Wheat	MT	Chihuahua, CI	\$5,896	\$402	\$64.35	\$1.75	-8
	OK	Cuautitlan, EM	\$5,410	\$244	\$57.77	\$1.57	-9
	KS	Guadalajara, JA	\$5,880	\$236	\$62.49	\$1.70	-9
	TX	Salinas Victoria, NL	\$3,018	\$61	\$31.46	\$0.86	-6
Corn	IA	Guadalajara, JA	\$6,395	\$277	\$68.18	\$1.85	-15
	SD	Penjamo, GJ	\$6,300	\$526	\$69.75	\$1.90	-15
	NE	Queretaro, QA	\$6,167	\$164	\$64.69	\$1.76	-11
	SD	Salinas Victoria, NL	\$4,740	\$400	\$52.52	\$1.43	-10
	MO	Tlalnepantla, EM	\$5,364	\$160	\$56.44	\$1.53	-14
	SD	Torreón, CU	\$5,310	\$441	\$58.76	\$1.60	-15
Soybeans	MO	Bojay (Tula), HG	\$5,819	\$234	\$61.85	\$1.68	-15
	NE	Guadalajara, JA	\$6,200	\$268	\$66.08	\$1.80	-17
	IA	Penjamo (Celaya), GJ	\$6,050	\$523	\$67.16	\$1.83	-18
	KS	Torreón, CU	\$5,040	\$166	\$53.19	\$1.45	-14
Sorghum	OK	Cuautitlan, EM	\$4,309	\$399	\$48.11	\$1.31	-12
	TX	Guadalajara, JA	\$4,800	\$342	\$52.54	\$1.43	-10
	NE	Penjamo, GJ	\$6,225	\$239	\$66.04	\$1.80	-12
	KS	Queretaro, QA	\$5,468	\$150	\$57.40	\$1.56	-8
	NE	Salinas Victoria, NL	\$4,377	\$176	\$46.52	\$1.26	-10
	NE	Torreón, CU	\$5,130	\$196	\$54.42	\$1.48	-13

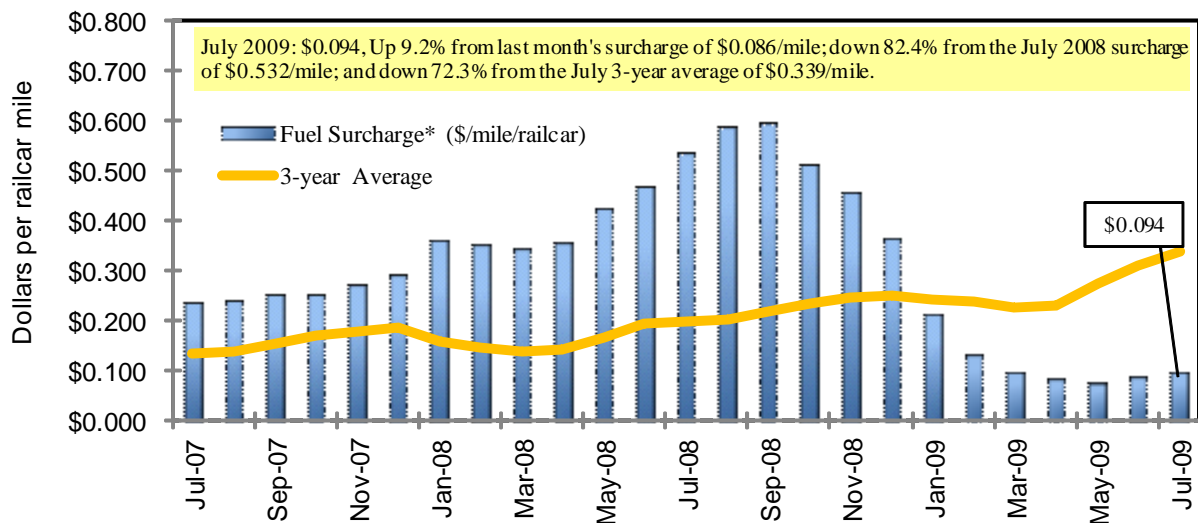
<sup>1</sup>Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

<sup>2</sup>Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<sup>3</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

Sources: www.bnsf.com, www.uprr.com, www.kcsouthern.com

Figure 7

**Railroad Fuel Surcharges, North American Weighted Average<sup>1</sup>**

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

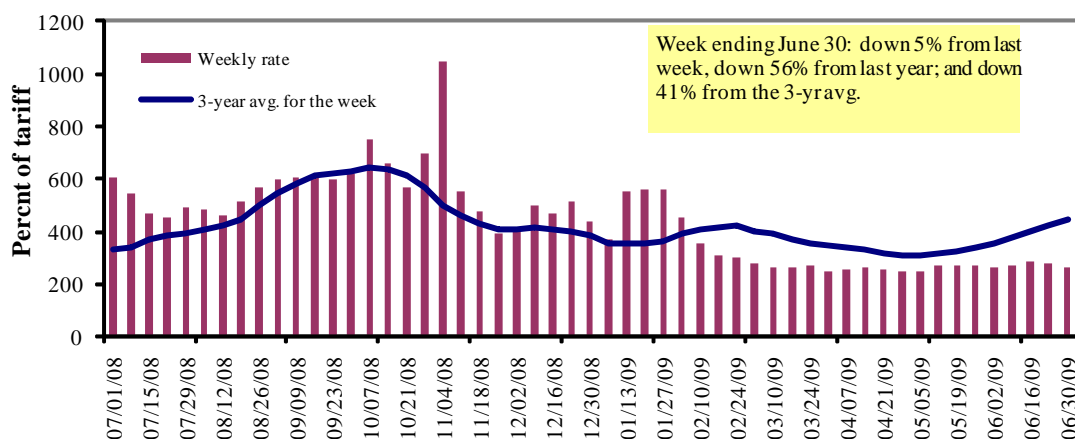
\* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

Sources: www.bnsf.com, www.cn.ca, www8.cpr.ca, www.csx.com, www.kcsi.com, www.nscorp.com, www.uprr.com

# Barge Transportation

Figure 8

## Illinois River Barge Freight Rate<sup>1,2</sup>



<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

### Weekly Barge Freight Rates: Southbound Only

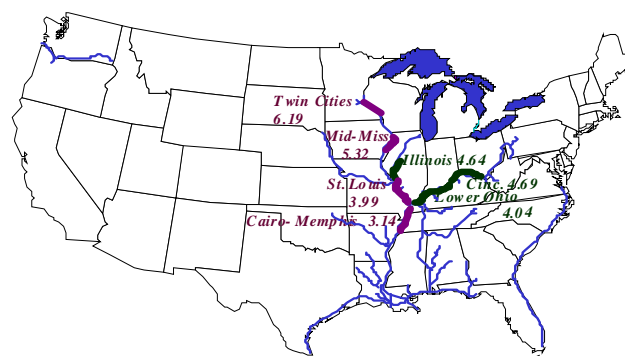
		Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	6/30/2009	318	271	263	196	201	201	179
	6/23/2009	335	285	276	193	199	199	176
<b>\$/ton</b>	6/30/2009	19.68	14.42	12.20	7.82	9.43	8.12	5.62
	6/23/2009	20.74	15.16	12.82	7.68	9.32	8.03	5.53
<b>Current week % change from the same week:</b>								
	Last year	-48	-53	-56	-56	-62	-62	-49
	3-year avg. <sup>2</sup>	-35	-40	-41	-45	-49	-49	-45
<b>Rate<sup>1</sup></b>	July	340	292	275	240	220	220	220
	September	453	437	440	425	425	425	438

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

### Benchmark tariff rates



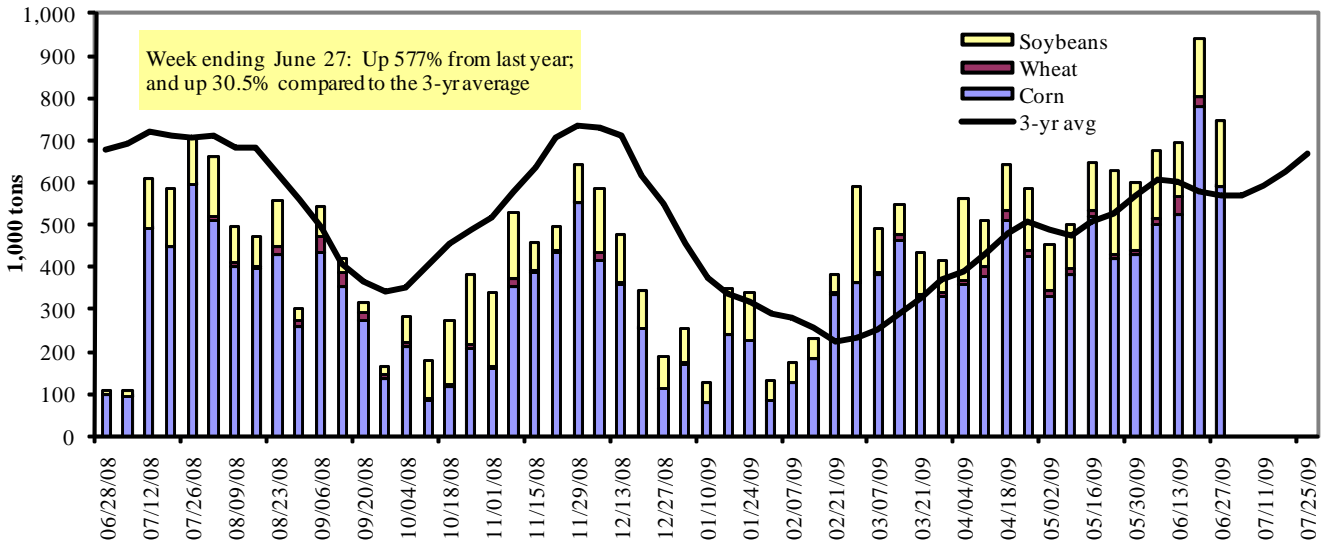
### Calculating barge rate per ton:

$(\text{Index} * 1976 \text{ tariff benchmark rate per ton}) / 100$

Select applicable index from market quotes included in tables on this page. The 1976 benchmark rates per ton are provided in map (see figure 9).

Figure 10

**Barge Movements on the Mississippi River<sup>1</sup> (Locks 27 - Granite City, IL)**



<sup>1</sup> The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrirmi/omni/webrpts/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webrpts/default.asp))

Table 10

**Barge Grain Movements (1,000 tons)**

Week ending 6/27/2009	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	263	2	47	0	312
Winfield, MO (L25)	425	2	97	3	527
Alton, IL (L26)	564	3	150	3	720
Granite City, IL (L27)	589	2	154	3	747
<b>Illinois River (L8)</b>	122	0	33	0	155
<b>Ohio River (L52)</b>	42	14	20	0	76
<b>Arkansas River (L1)</b>	0	23	7	8	38
Weekly total - 2009	631	38	181	12	861
Weekly total - 2008	112	39	24	6	181
2009 YTD <sup>1</sup>	11,637	665	4,750	234	17,286
2008 YTD	9,015	452	3,421	285	13,173
2009 as % of 2008 YTD	129	147	139	82	131
Last 4 weeks as % of 2008 <sup>2</sup>	239	147	195	156	220
Total 2008	18,783	1,542	7,062	453	27,840

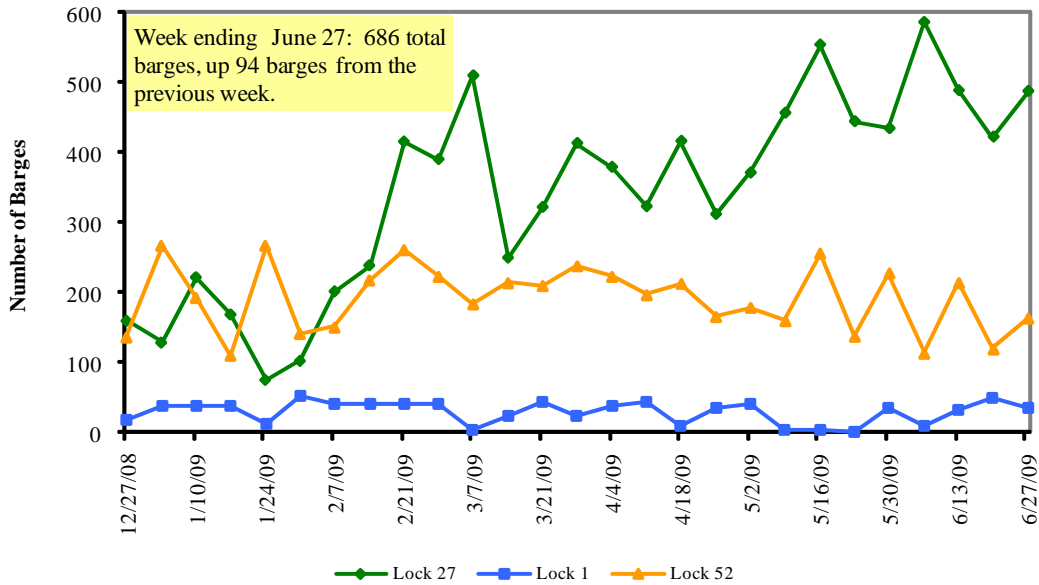
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2008.

Note: Total may not add exactly, due to rounding

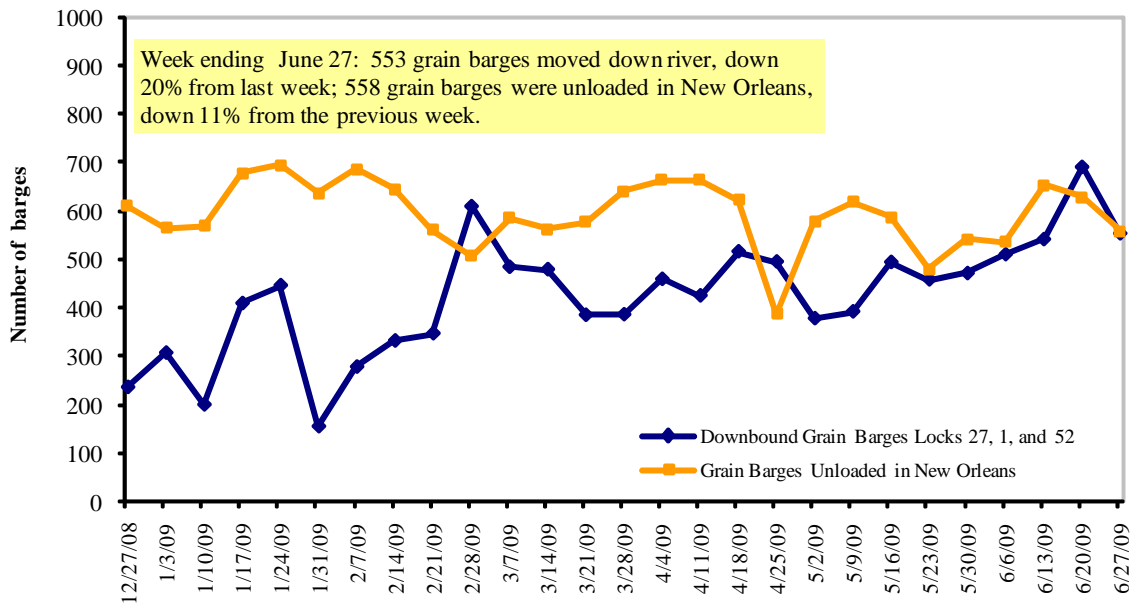
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrirmi/omni/webrpts/default.asp](http://www.mvr.usace.army.mil/mvrirmi/omni/webrpts/default.asp))

**Figure 11**  
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52**



Source: U.S. Army Corps of Engineers

**Figure 12**  
**Grain Barges for Export in New Orleans Region**



Source: U.S. Army Corps of Engineers and GIPSA

# 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<sup>1</sup>, Week Ending 6/29/2009 (US\$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.629	-0.005	-2.075
	New England	2.666	-0.004	-2.156
	Central Atlantic	2.726	-0.004	-2.096
	Lower Atlantic	2.584	-0.006	-2.059
II	Midwest <sup>2</sup>	2.578	-0.009	-1.993
III	Gulf Coast <sup>3</sup>	2.569	-0.014	-2.035
IV	Rocky Mountain	2.631	0.017	-2.007
V	West Coast	2.712	-0.008	-2.105
	California	2.785	-0.004	-2.143
Total	U.S.	2.608	-0.008	-2.037

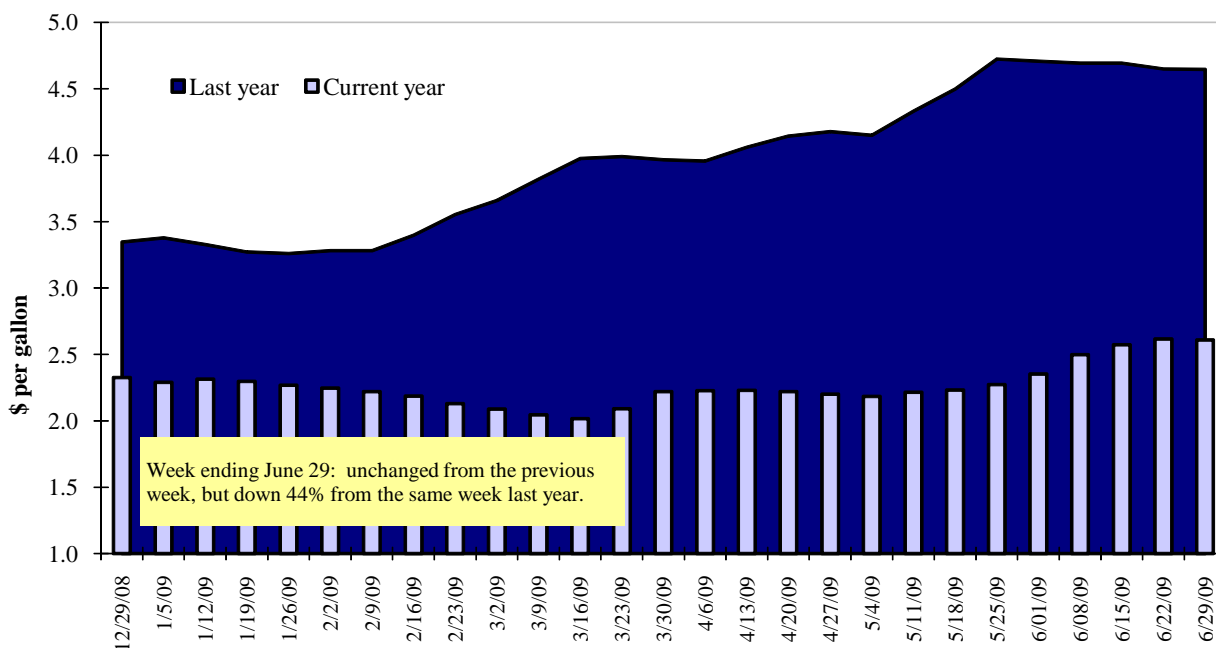
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<sup>2</sup>Same as North Central <sup>3</sup>Same as South Central

Source: Energy Information Administration/U.S. Department of Energy ([www.eia.doe.gov](http://www.eia.doe.gov))

Figure 13

## Weekly Diesel Fuel Prices, U.S. Average



Source: Retail On-Highway Diesel Prices, Energy Information Administration, Dept. of Energy

# Grain Exports

Table 12

## U.S. Export Balances and Cumulative Exports (1,000 metric tons)

Week ending	Wheat						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
<b>Export Balances<sup>1</sup></b>									
6/18/2009	1,041	534	751	809	196	3,331	9,072	3,527	15,930
This week year ago	3,379	1,593	1,261	867	236	7,336	9,588	2,877	19,801
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2008/09 YTD	329	57	212	187	7	792	34,003	30,322	65,117
2007/08 YTD	745	232	186	69	12	1,245	50,097	27,313	78,655
YTD 2008/09 as % of 2007/08	44	25	114	271	58	64	68	111	83
Last 4 wks as % of same period 2007/08	26	26	52	77	62	38	97	138	81
2007/08 Total	13,709	5,568	7,842	4,191	1,075	32,385	59,666	30,411	122,462
2006/07 Total	6,800	3,866	6,480	4,996	761	22,902	53,799	30,261	106,962

<sup>1</sup> Current unshipped export sales to date

<sup>2</sup> Shipped export sales to date; new marketing year is now in effect for wheat

Note: YTD = year-to-date. Marketing Year: wheat = 6/01-5/31, corn & soybeans = 9/01-8/31

Source: Foreign Agricultural Service/USDA (www.fas.usda.gov)

Table 13

## Top 5 Importers<sup>1</sup> of U.S. Corn

Week ending 06/18/09	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2007/08
	2009/10	2008/09	2007/08		
	Next MY	Current MY	Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	203	14,553	15,390	(5)	15,294
Mexico	439	6,932	8,667	(20)	8,767
Korea <sup>4</sup>	419	4,356	8,481	(49)	8,621
Taiwan	32	3,255	3,354	(3)	3,476
Egypt	0	1,676	3,133	(47)	3,309
<b>Top 5 importers</b>	<b>1,092</b>	<b>30,772</b>	<b>39,025</b>	<b>(21)</b>	<b>39,467</b>
<b>Total US corn export sales<sup>5</sup></b>	<b>2,288</b>	<b>43,076</b>	<b>59,685</b>	<b>(28)</b>	<b>61,870</b>
% of Projected	5%	97%	96%		
Change from Last Week	250	687	231		
<b>Top 5 importers' share of U.S. corn export sales</b>	48%	71%	65%		
<b>USDA forecast, June 2009</b>	<b>48,260</b>	<b>44,450</b>	<b>61,870</b>	<b>(28)</b>	
<b>Corn Use for Ethanol USDA forecast, June 2009</b>	<b>104,140</b>	<b>95,250</b>	<b>76,861</b>	<b>24</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

000 mt: 2009/10).

<sup>5</sup>Not included - FAS Press Release: 118,000 mt on 06/30 to Unknown (60,000 mt: 2008/09; 58,000 mt: 2009/10).

Table 14

**Top 5 Importers<sup>1</sup> of U.S. Soybeans**

Week ending 06/18/09	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2007/08
	2009/10 Next MY	2008/09 Current MY	2007/08 Last MY		
	- 1,000 mt -				- 1,000 mt -
China <sup>4</sup>	1,817	18,501	13,233	40	13,354
Mexico	250	2,931	3,520	(17)	3,575
Japan	81	2,434	2,847	(15)	2,710
EU-25	135	2,180	3,754	(42)	3,896
Taiwan	0	1,459	1,576	(7)	1,728
<b>Top 5 importers</b>	<b>2,282</b>	<b>27,503</b>	<b>24,930</b>	<b>10</b>	<b>25,262</b>
<b>Total US soybean export sales</b>	<b>4,429</b>	<b>33,849</b>	<b>30,190</b>	<b>12</b>	
% of Projected	13%	99%	96%		
Change from last week	215	28	(268)		
<b>Top 5 importers' share of U.S.</b>					
<b>soybean export sales</b>	52%	81%	83%		
<b>USDA forecast, June 2009</b>	<b>34,290</b>	<b>34,020</b>	<b>31,600</b>	<b>8</b>	
<b>Soybean Use for Biodiesel USDA</b>					
<b>forecast, June 2009</b>	<b>5,275</b>	<b>4,196</b>	<b>7,148</b>	<b>(41)</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2006/07 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.<sup>4</sup>Not included - FAS Press Release: **113,000 mt** on 06/30 to China for 2008/09.

Table 15

**Top 10 Importers<sup>1</sup> of All U.S. Wheat**

Week ending 06/18/09	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2008/09
	2009/10 Current MY	2008/09 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	381	920	(59)	3,103
Nigeria	496	655	(24)	2,661
Mexico	433	861	(50)	2,423
Egypt	55	481	(89)	1,928
Philippines	457	763	(40)	1,480
Iraq	0	1,147	(100)	1,205
Korea, South	365	340	7	1,127
Brazil	25	639	(96)	789
Colombia	159	96	67	749
Taiwan	170	99	73	714
<b>Top 10 importers</b>	<b>2,542</b>	<b>5,999</b>	<b>(58)</b>	<b>16,179</b>
<b>Total US wheat export sales</b>	<b>4,123</b>	<b>8,581</b>	<b>(52)</b>	<b>25,973</b>
% of Projected	17%	31%		
Change from last week	368	498		
<b>Top 10 importers' share of U.S.</b>				
<b>wheat export sales</b>	62%	70%		
<b>USDA forecast, June 2009</b>	<b>24,490</b>	<b>27,490</b>	<b>(11)</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.



Table 16

**Grain Inspections for Export by U.S. Port Region (1,000 metric tons)**

Port regions	Week ending 06/25/09	2009 YTD <sup>1</sup>	2008 YTD <sup>1</sup>	2009 YTD as % of 2008 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2008
					2008	3-yr. avg.	
<b>Pacific Northwest</b>							
Wheat	133	4,769	5,599	85	155	116	10,508
Corn	110	3,758	7,049	53	40	48	12,641
Soybeans	189	3,932	4,704	84	39	61	9,478
<b>Total</b>	<b>431</b>	<b>12,459</b>	<b>17,352</b>	<b>72</b>	<b>65</b>	<b>72</b>	<b>32,626</b>
<b>Mississippi Gulf</b>							
Wheat	69	2,008	2,129	94	72	67	6,321
Corn	552	14,357	16,209	89	99	92	28,497
Soybeans	136	9,796	7,619	129	159	168	16,295
<b>Total</b>	<b>756</b>	<b>26,161</b>	<b>25,957</b>	<b>101</b>	<b>107</b>	<b>101</b>	<b>51,113</b>
<b>Texas Gulf</b>							
Wheat	74	2,561	4,452	58	51	89	9,852
Corn	0	774	987	78	115	122	1,516
Soybeans	0	471	105	449	n/a	n/a	178
<b>Total</b>	<b>74</b>	<b>3,806</b>	<b>5,544</b>	<b>69</b>	<b>55</b>	<b>92</b>	<b>11,545</b>
<b>Great Lakes</b>							
Wheat	0	109	201	54	90	14	831
Corn	0	53	67	79	3	1	294
Soybeans	16	69	26	271	n/a	633	315
<b>Total</b>	<b>16</b>	<b>232</b>	<b>293</b>	<b>79</b>	<b>138</b>	<b>25</b>	<b>1,439</b>
<b>Atlantic</b>							
Wheat	1	203	406	50	7	5	891
Corn	0	72	445	16	79	54	576
Soybeans	1	414	333	124	186	39	605
<b>Total</b>	<b>2</b>	<b>689</b>	<b>1,185</b>	<b>58</b>	<b>27</b>	<b>17</b>	<b>2,073</b>
<b>U.S. total from ports<sup>2</sup></b>							
Wheat	276	9,541	12,586	76	81	85	28,402
Corn	661	19,014	24,757	77	78	77	43,523
Soybeans	341	14,683	12,787	115	109	130	26,871
<b>Total</b>	<b>1,279</b>	<b>43,238</b>	<b>50,130</b>	<b>86</b>	<b>84</b>	<b>87</b>	<b>98,796</b>

<sup>1</sup> Includes weekly revisions, some regional totals may not add exactly due to rounding.

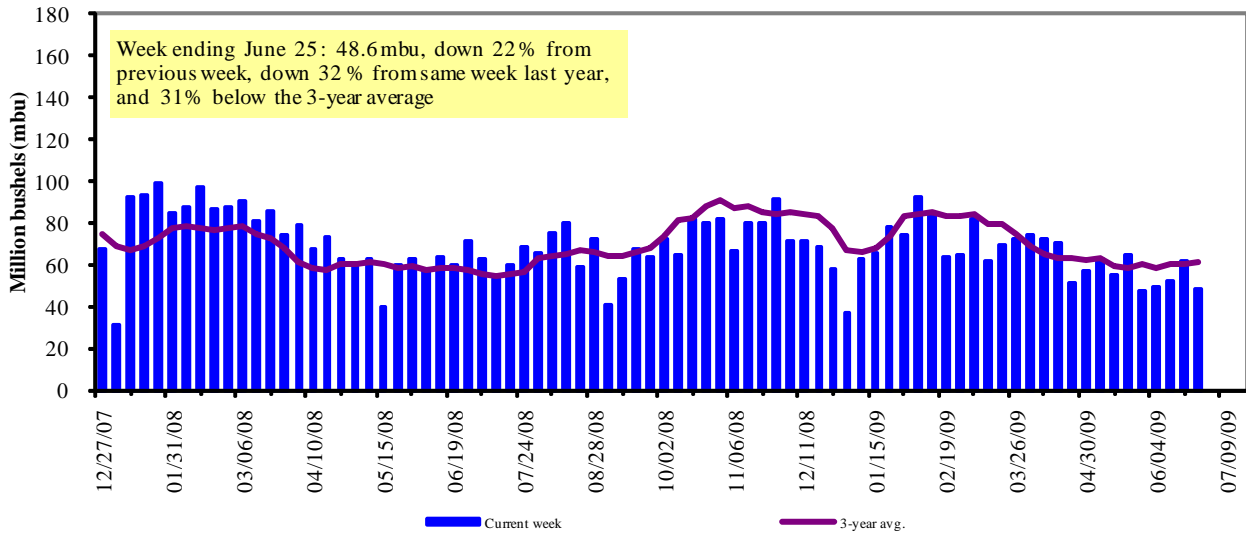
<sup>2</sup> Total includes only port regions shown above

Source: Grain Inspection, Packers and Stockyards Administration/USDA ([www.gipsa.usda.gov](http://www.gipsa.usda.gov)); YTD= year-to-date; n/a = not applicable

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 57 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2008.

Figure 14

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

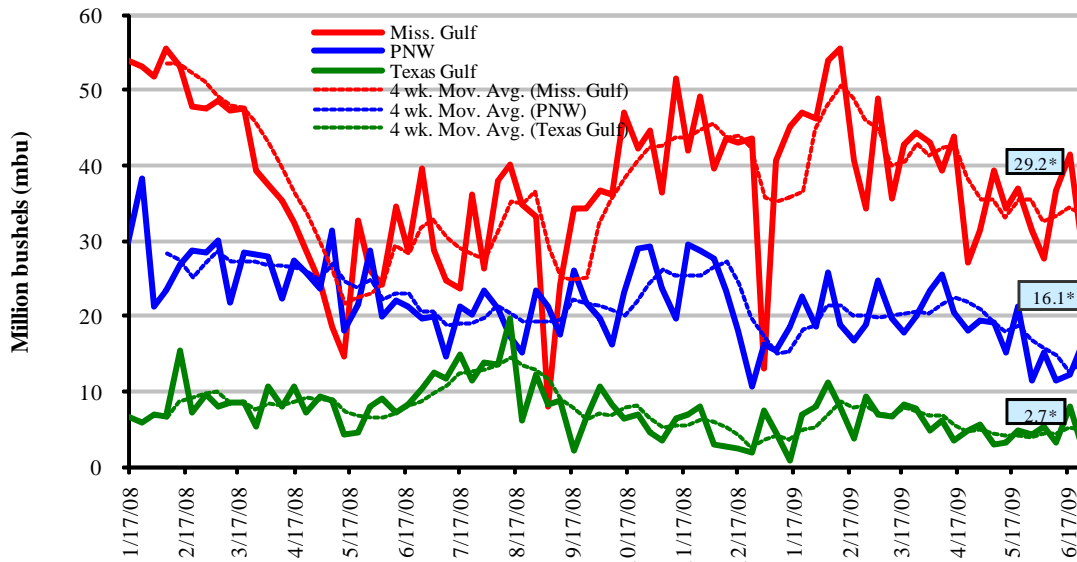


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**Weekly U.S. Grain Inspections: U.S. Gulf and PNW (wheat, corn, and soybeans)**



Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov); \*mbu, this week.

June 25: % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 30	down 66	down 36	up 32
Last year (same week)	down 27	down 74	down 36	down 18
3-yr avg. (4-wk mov. avg.)	down 13	down 48	down 18	down 18

# Ocean Transportation

Table 17

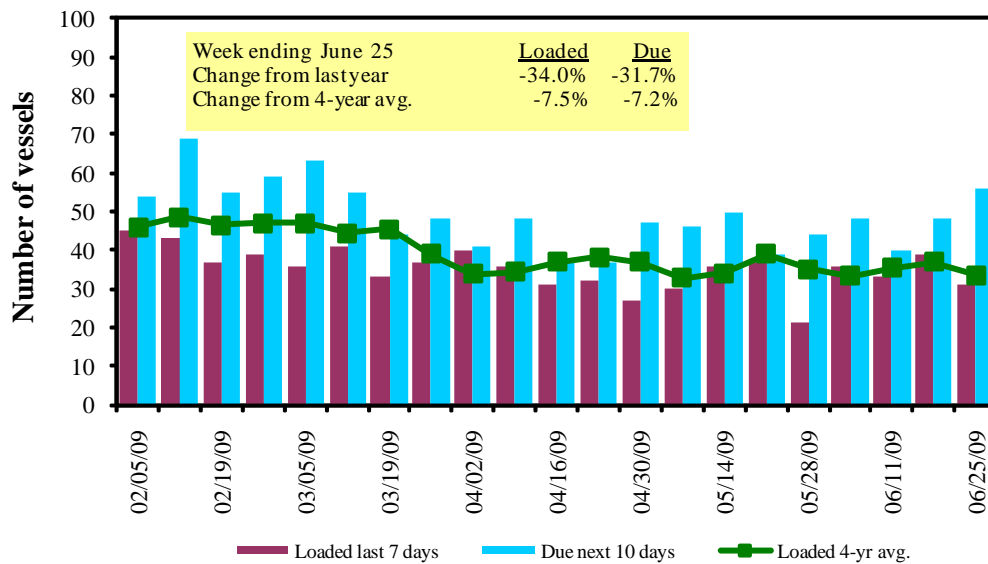
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
6/25/2009	21	31	56	10	8
6/18/2009	18	39	48	5	6
2008 range	(15..55)	(27..61)	(39..87)	(2..16)	(0..15)
2008 avg.	35	42	61	10	7

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

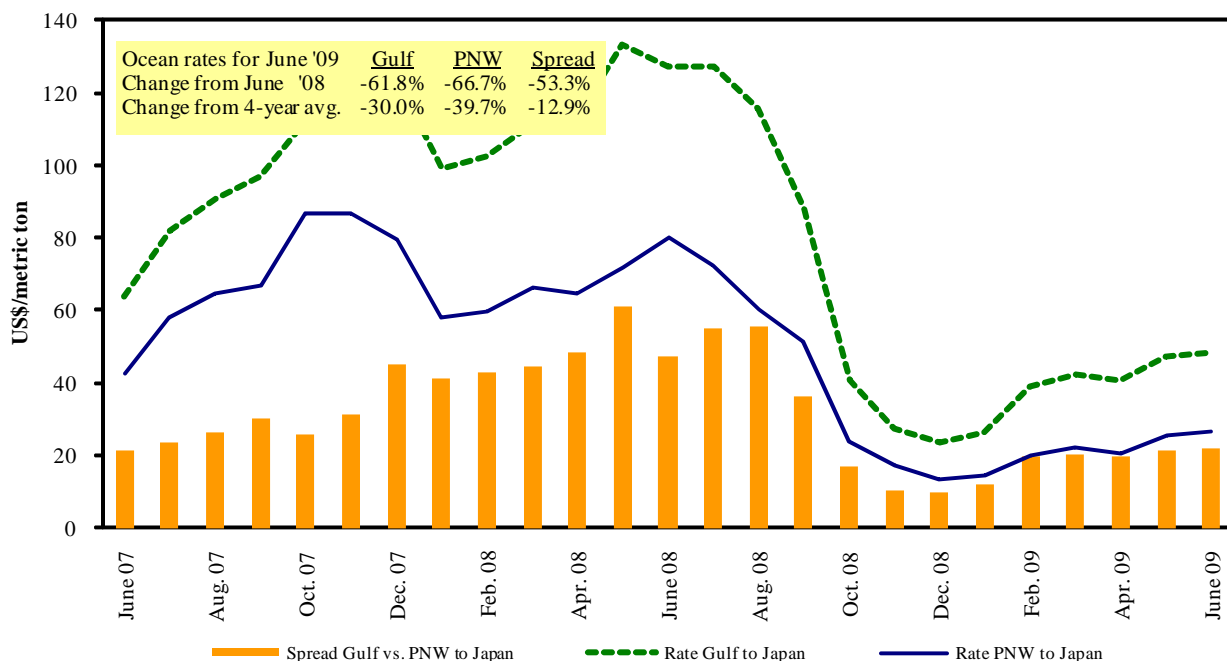
**U.S. Gulf<sup>1</sup> Vessel Loading Activity**



Source: Transportation & Marketing Programs/AMS/USDA  
<sup>1</sup>U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

### Grain Vessel Rates, U.S. to Japan



Source: Drewry Shipping Consultants Ltd ([www.drewry.co.uk](http://www.drewry.co.uk))/O'Neil Commodity Consulting

Table 18

### Ocean Freight Rates For Selected Shipments, Week Ending 6/27/2009

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Algeria	Maize	May/20/25	30,000	34.10
U.S. Gulf	China	Hvy Grain	May 10/25	55,000	38.00
U.S. Gulf	Russia	Hvy Grain	Feb 25/Mar 5	25,000	30.50
U.S. Gulf	Mozambique <sup>1</sup>	Wheat	May 15/25	20,000	111.83
Brazil	Morocco	Soybeans	Jun 1/10	30,000	29.00
Brazil	China	Grain	Aug 1/15	60,000	49.00
Brazil	China	Grain	Mar 20/30	80,000	32.50
Brazil	Continent	Soybeans	Apr 5/8	60,000	18.00
Brazil	Morocco	Corn	May 1/5	25,000	30.00
River Plate	Algeria	Maize	Jul 1/10	25,000	43.50
River Plate	Algeria	Maize	Jun 20/25	25,000	39.00
River Plate	Algeria	Maize	May 22/25	25,000	36.75
River Plate	China	Hvy Grain	Apr	60,000	32.50
River Plate	Libya	Soybean meal	Mar 1/14	15,000	51.00
River Plate	Poland	Corn	Jul 5/12	30,000	39.00
River Plate	Poland	Meals	Apr 1/5	30,000	36.00
Russia	Spain Mediterranean	Corn	May 19/25	25,000	19.25

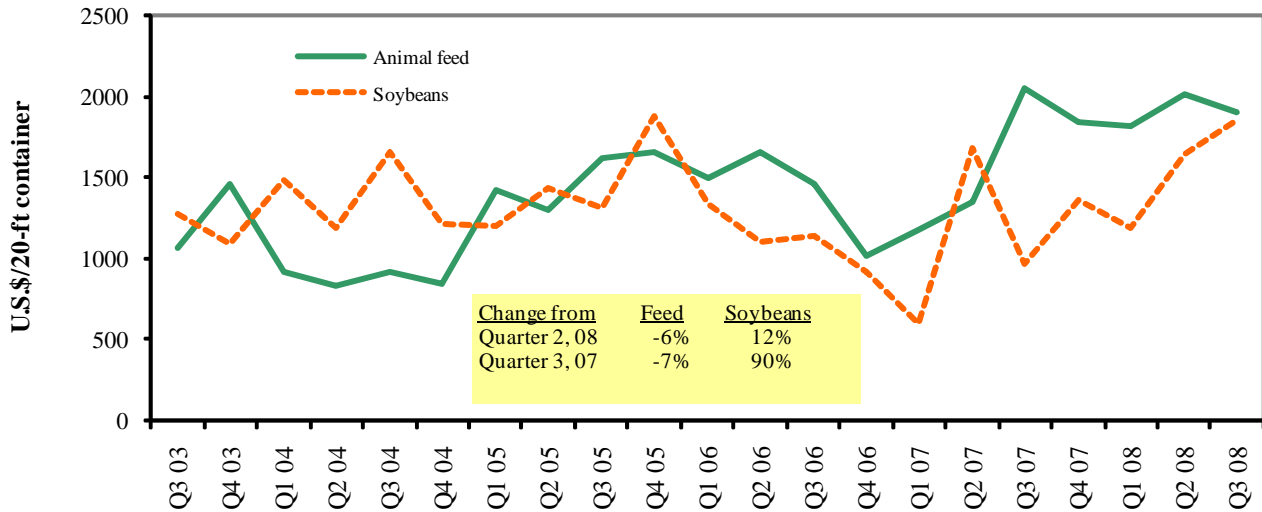
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

<sup>1</sup>75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Source: Maritime Research Inc. ([www.maritime-research.com](http://www.maritime-research.com))

Figure 18

**Ocean Rates<sup>1</sup> for Containerized Shipments to Selected Asian Countries**



<sup>1</sup>Rates are weighted by shipping line market share and destination country. Rates provided are publicly filed tariff rates, not those negotiated in a confidential service contract.

Countries include: Animal Feed: Bangkok-Thailand (3%), Busan-Korea (25%), Hong Kong (9%), Kaohsiung/Keelung-Taiwan (55%), Tokyo-Japan (8%). Soybeans: Kaohsiung/Keelung-Taiwan (97%), Tokyo-Japan (2%)

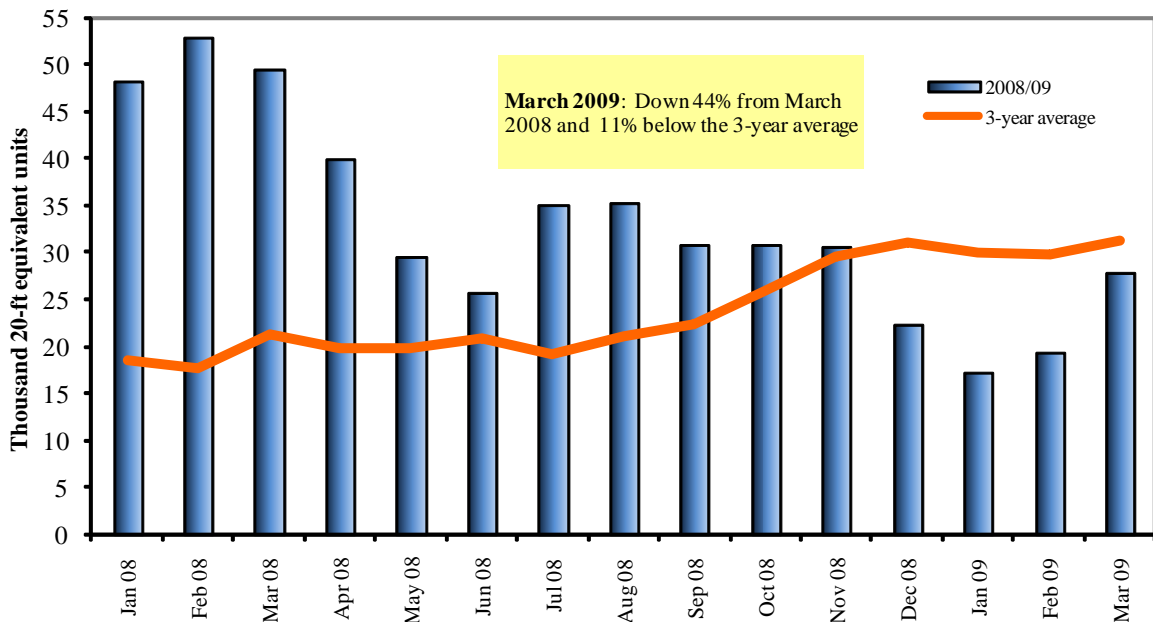
Source: Ocean Rate Bulletin, Quarter 3, 2008, Transportation & Marketing Programs/AMS/USDA

Container ocean freight rates – average rate per twenty-foot equivalent unit (TEU) weighted by shipping line market share and trade route.

During 2008, containers were used to transport 6 percent of total U.S. waterborne grain exports, and 9 percent of U.S. grain exports to Asia.

Figure 19

**Monthly Shipments of Containerized Grain to Asia**



Source: Port Import Export Reporting Service (PIERS), *Journal of Commerce*

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