



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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WEEKLY HIGHLIGHTS

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Grain Inspections Lowest Since July Last Year

For the week ending August 20, **total inspections of grain** (corn, wheat, soybeans) from all major export regions reached 1.38 million metric tons (mmt), down 25 percent from the past week, down 25 percent from last year, and 7 percent below the 3-year average. Grain inspections were the lowest since late July of last year. Wheat and soybean inspections were down 50 and 44 percent compared to the previous week. Corn inspections, however, increased 2 percent from the past week, with Mississippi Gulf corn inspections up 3 percent. Pacific Northwest grain inspections dropped 65 percent from the previous week as shipments to Asia declined. Mississippi Gulf inspections also decreased 10 percent.

TEMCO Completes Renovations at Columbia River Export Terminal

According to *Grain Journal*, TEMCO LLC export terminal recently completed renovations to its facility located on the Columbia River in Kalama, WA. The project, which originally started in 2012, includes additional slip-form concrete shipping bins, new cleaning facilities, a third rail receiving pit with added track, a barge unloader and dock, and a new dock for ocean vessels. During the last 3 years, exports at Columbia River grain terminals have averaged 8.3 mmt (310 million bushels), representing about 30 percent of total Pacific Northwest (PNW) grain exports annually, according to USDA. These infrastructure improvements are expected to allow the terminal to meet global export demand for U.S. grain.

Diesel Fuel Prices Continue Downward Trend

During the week ending August 24, U.S. average diesel fuel prices decreased 5 cents from the previous week to \$2.56 per gallon. Prices have fallen a total of 35 cents over the past 13 weeks. The continued fall in crude oil prices has allowed diesel fuel prices to fall as well. As harvest begins, cheaper diesel fuel will be a welcomed savings for farmers.

Louisiana and Mississippi Corn Harvest Ahead of Pace

According to National Agricultural Statistics Service, the Louisiana corn harvest is 87 percent complete as of the week ending August 23. This is considerably higher than the pace at this time last year when only 34 percent of the corn crop harvest was completed, and higher than the 5-year average pace of 69 percent. Louisiana, being a smaller corn-producing State, is forecast to produce 66.3 million bushels, with much of the production area in the northeastern section of the State adjacent to the Mississippi River. The corn harvest is 52 percent complete in Mississippi, which is expected to produce 95.7 million bushels this year. Mississippi's harvest is ahead of last year's pace of 18 percent and ahead of the 5-year average pace of 36 percent. The early harvest pace in these two States could supply new crop corn to exporters in the Mississippi Gulf Port Region from a relatively short distance away.

Snapshots by Sector

Export Sales

During the week ending August 13, **unshipped balances** of wheat, corn, and soybeans totaled 5.3 mmt, down 10 percent from the same time last year. Net weekly **wheat export sales** of .314 mmt down 25 percent from the prior week. **Corn export sales** of .283 mmt were up notably from the prior week, and **soybean net export sales** were .020 mmt, down 79 percent from the past week.

Rail

U.S. Class I railroads originated 19,708 **carloads of grain** during the week ending August 15, down 9 percent from last week, up 10 percent from last year, and up 10 percent from the 3-year average.

During the week ending August 20, average September shuttle **secondary railcar bids/offers per car** were \$187 below tariff, up \$8 from last week, and \$1,111 lower than last year. Non-shuttle secondary railcar bids/offers were \$97 below tariff and down \$110 from last week, and \$1,097 lower than last year.

Barge

During the week ending August 22, **barge grain movements** totaled 646,150 tons, down 31 percent from last week, and up 8 percent from the same period last year.

During the week ending August 22, 411 grain barges **moved down river**, down 32 percent from last week; 603 grain barges were **unloaded in New Orleans**, about the same as the previous week.

Ocean

During the week ending August 20, 37 **ocean-going grain vessels** were loaded in the Gulf, 12 percent more than the same period last year. Forty-six vessels are expected to be loaded within the next 10 days, 2 percent more than the same period last year.

During the week ending August 21, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$36 per metric ton (mt), up 1 percent from the previous week. The cost of shipping from the PNW to Japan was \$19.25 per mt, up 3 percent from the previous week.

Feature Article/Calendar

2015 Ag Transportation Summit: Discussion and Takeaways

The National Grain and Feed Association and the Soy Transportation Coalition, with support from the U.S. Department of Agriculture's Agricultural Marketing Service, held their second biennial "Ag Transportation Summit" in Rosemont, IL, on August 4-5, 2015. Approximately 200 individuals were in attendance, with representatives from the major rail companies, shippers, ports, truckers, farmers, and government agencies.¹

Conference Theme:

The conference theme was overcoming challenges in transportation capacity. Discussion panels stressed the urgent need to repair, replace, or upgrade the nation's aging transportation infrastructure to maintain a competitive advantage on freight costs. An efficient and timely transportation system is necessary to connect farmers to valuable markets both domestically and abroad.² Some key points from the panel discussions as outlined in recent media reports are highlighted below:

Maintaining a Competitive Edge in Infrastructure: Dr. Walter Kemmsies, chief economist at Moffatt & Nichol, a logistics consulting firm, noted that U.S. infrastructure, particularly the Mississippi River, was a major contributor to the country's increasing prominence after the World Wars.³ In follow up conversation with the media after Kemmsies' remarks, Mike Steenhoek, executive director of the Soy Transportation Coalition, added that the source of the U.S. competitive advantage is due to lower cost of transportation rather than lower cost of production. He stressed the need for the United States to keep investing in infrastructure development to maintain its competitive advantage.⁴

Highways and Highway bill: The panel on surface transportation encouraged a long-term highway bill that recognizes rural transportation needs. Arthur Scott, associate legislative director of agriculture and rural affairs at the National Association of Counties, told attendees, "Counties need a strong federal partner and a surface transportation program that meets the needs of rural America."⁵ Scott cited data from the Federal Highway Administration indicating that 40 percent of rural roads are not adequate for travel and almost half of the bridges are structurally deficient.

Turnaround in rail service: According to Debra Miller of the Surface Transportation Board, railroads achieved a "stunning turnaround." Last year, they "were not able to move goods quickly enough, and now they don't have enough to move."⁶ Representatives from the major railroads said they are investing in new track and equipment.

Panama Canal expansion: Javier Ho, a bulk shipping specialist with the Panama Canal Authority, said that expansion work on the canal is more than 91 percent complete and is on track for opening in the second quarter of 2016.⁷ The expansion (which includes building new entrances, replacing locks, and deepening and widening the channel through Gatun Lake) will allow bigger vessels to use the canal and should lower the cost of shipping grain and soybeans. Ho presented data showing that the ocean shipping cost of transporting soybeans from eastern Iowa via the Gulf to Japan in a larger vessel would drop from \$30.69 per metric ton to \$21.43.

During the Summit, Kemmsies also predicted, "Brazil's cost will drop to about 15 percent below the cost of exporting soy from the U.S." once the canal opens in 2016.⁸ "With the dollar getting stronger, and with the U.S. not investing in infrastructure, you will see who is surging as a competitor to the U.S. and who is falling behind."

¹ Source: http://www.grainnet.com/articles/Ag_Transportation_Summit_Concludes_in_Chicago_IL-152214.html.

² Source: Study of Rural Transportation Issues, U.S. Department of Agriculture, Agricultural Marketing Service, April 2010. Web <<http://www.ams.usda.gov/sites/default/files/media/RTIFullReport.pdf>>, p. 19.

³ Source: <http://kticradio.com/agricultural/us-could-be-losing-competitive-advantage-in-infrastructure/>.

⁴ *Ibid.*

⁵ Source: <http://farmweeknow.com/story-panel-long-term-highway-bill-needed-3-130724>.

⁶ Source: Agri-Pulse Communications, Inc. news article: "Optimism improves for long-term funding bill, despite funding woes" (August 5, 2015).

⁷ *Ibid.*

⁸ Source: <http://kticradio.com/agricultural/us-could-be-losing-competitive-advantage-in-infrastructure/>.

Additional Discussion/Analysis of Ag Summit Issues:

The paragraphs below provide in-depth analyses of the issues raised at the Summit.

Transportation is Important to Agriculture: U.S. agricultural producers rely on a transportation network that is reliable, efficient, and safe. The United States transportation network includes barges, railroads, and trucks for moving agricultural products, including grain, to U.S. domestic consumers and to the export ports for shipment to the foreign consumers. Historically, rail and barges have been the dominant modes of moving grain destined for export, with barge and rail each possessing a 45 percent share; while trucks move 76 percent of domestic shipments (see *A Modal Share Analysis of U.S. Grains*).

Efficient Transportation is Critical for Agriculture's Competitiveness: An efficient transportation system results in lower shipping cost, smaller marketing margins for middlemen, and more competitive export prices. It may also result in lower food costs for U.S. consumers and higher market prices for U.S. producers. For example, the transportation share of the landed costs for shipping grain from the United States to Europe ranged from 16 to 19 percent, and 19 to 21 percent to China (see *Grain Transportation Report (GTR), dated 06/18/15*). On the other hand, the transportation share of the landed costs from Brazil to Europe ranged from 18 to 36 percent, and 20 to 28 percent to China.

However, a 2012 study funded by the United Soybean Board supports the growing evidence that the U.S.' advantage continues to be threatened by the deterioration of its highways, bridges, rails, locks, and dams.¹ The study also added that the U.S. farmers depend on a 50-year-old highway system; a 70-year-old inland waterway system and a railway network built in the late 1800s to move their products from the fields to end users. In addition, since a larger share of domestic grain consumptions is moved by truck, improved rural roads and bridges will be beneficial and facilitate efficient transportation movements.

Rail Service Has Improved Dramatically: Last year, increased demand to ship coal, oil, intermodal containers, sand, gravel, and a record harvest of corn, soybeans, and wheat during the 2013/14 U.S. fall harvest season put added demand on rail networks. This resulted in rail service delays in Upper Midwest States, such as Minnesota, Montana, North Dakota, and South Dakota (see *GTR, dated 03/19/15*). Record crops in addition to the extra cost of transportation and storage drove down the crop prices in the affected States. However, rail service had markedly improved by the end of the first quarter of 2015 (see *GTR, dated 04/23/15*). The improvements in service resulted in secondary rail car auction values returning to within normal range, a vast reduction from previous year's persistent rail backlog, improvements in train speed, and strong weekly rail volumes of grain and oilseed shipments.

Panama Canal is Critical Link to Export Markets: Finally, the Panama Canal is a vital link for trade between the east coast of the United States and Asia and western South American countries because of shorter distances to the destination (see *GTR, dated 08/06/15*). Grains leaving the U.S. East Coast ports to Asia are usually transported in Panamax vessels, and the typical grain shipments are 55,000 metric tons (mt). An expanded canal will allow the movements of Post-Panamax vessels with 80,000-110,000-ton capacity that may load up to 85,000 mt of grain depending on the destination ports. The expanded canal will also reduce the Canal Water Time (time it takes a vessel to transit the canal). The economies of size in loading and reduced Canal Water Time may translate into lower or reduced transportation costs in the long run. Reduced transportation and landed costs will likely benefit U.S. exporters and foreign buyers.

Overall Conclusion:

Summit participants raised and discussed issues that are pertinent to development and maintenance of the U.S. transportation network. The issues focused on the critical need for the United States to maintain its competitive advantage over our export competitors such as Brazil and Argentina. The next Ag Transportation Summit will be held in Summer 2017.²

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¹ Source: <http://westernfarmpress.com/management/aging-transportation-system-threatens-us-agriculture>. Study available here: <http://unitedsoybean.org/wp-content/uploads/FarmToMarketStudy.pdf>.

² Source: <http://www.ngfa.org/upcoming-events/transportation-summit/>.

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
08/26/15	172	247	204	189	161	137
08/19/15	176	250	203	176	159	133

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); and ocean = routes to Japan (\$/metric ton)

Source: Transportation & Marketing Programs/AMS/USDA

Table 2

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

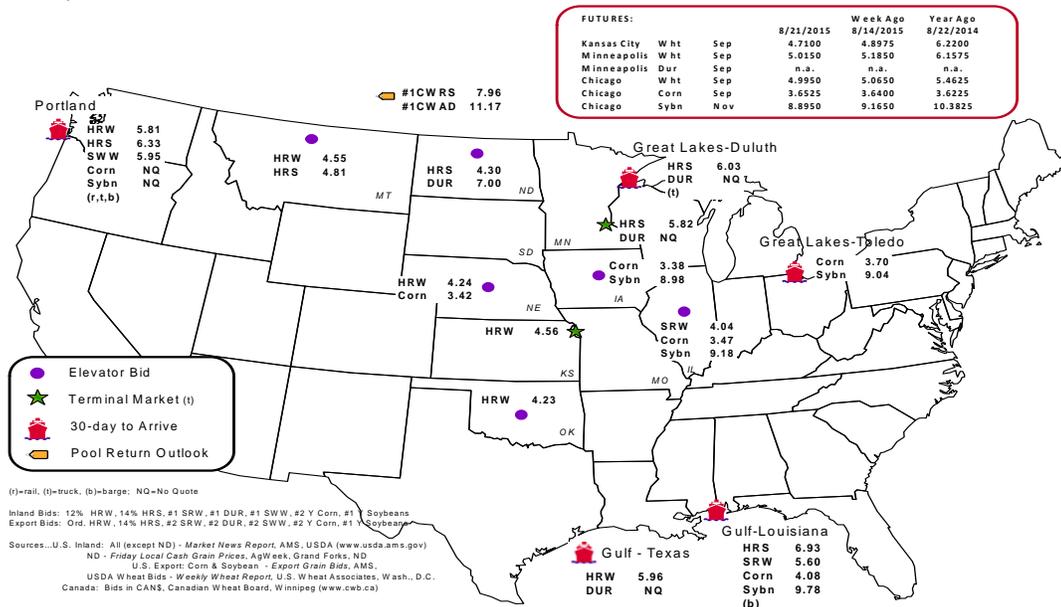
Commodity	Origin--Destination	8/21/2015	8/14/2015
Corn	IL--Gulf	-0.61	-0.55
Corn	NE--Gulf	-0.66	-0.64
Soybean	IA--Gulf	-0.80	-0.66
HRW	KS--Gulf	-1.40	-1.25
HRS	ND--Portland	-2.03	-1.87

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)¹

Week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
8/19/2015 ^p	136	810	2,731	114	3,791	8/15/2015	1,939
8/12/2015 ^r	95	1,121	2,225	31	3,472	8/8/2015	2,136
2015 YTD ^r	12,775	39,354	134,081	14,671	200,881	2015 YTD	58,911
2014 YTD ^r	21,024	53,987	146,424	17,347	238,782	2014 YTD	61,872
2015 YTD as % of 2014 YTD	61	73	92	85	84	% change YTD	95
Last 4 weeks as % of 2014 ²	69	57	76	39	69	Last 4wks % 2014	117
Last 4 weeks as % of 4-year avg. ²	51	63	89	64	79	Last 4wks % 4 yr	125
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2013 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 KCSM and FerroMex.

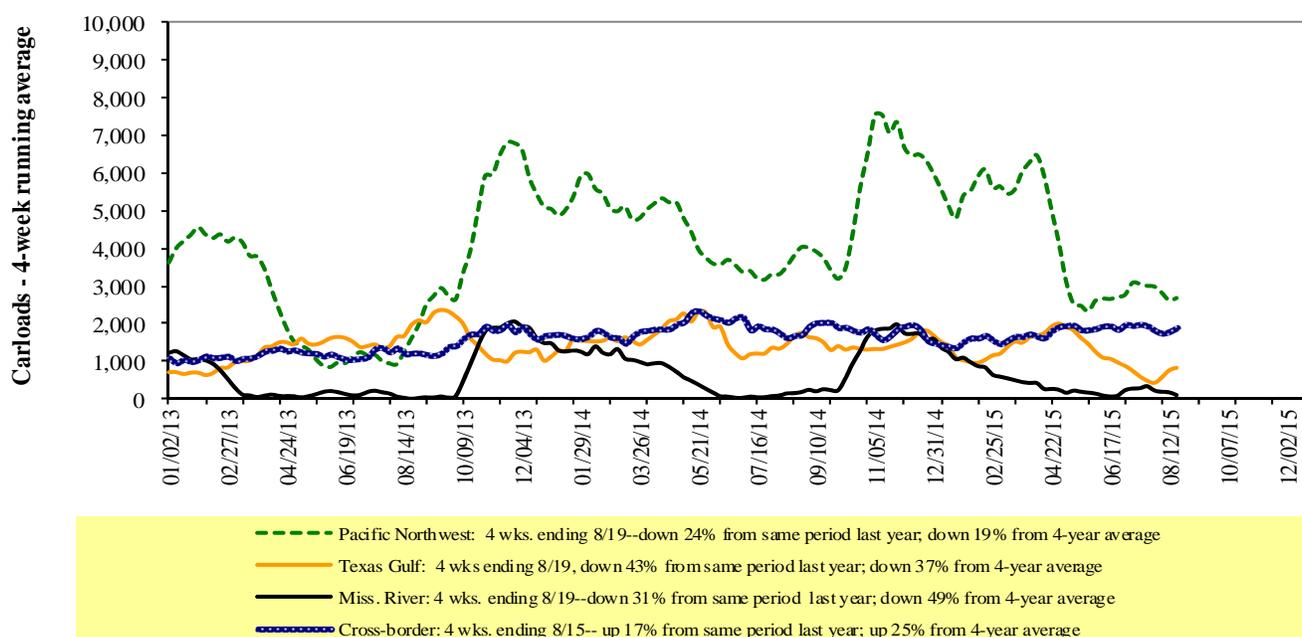
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

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: Transportation & Marketing Programs/AMS/USDA

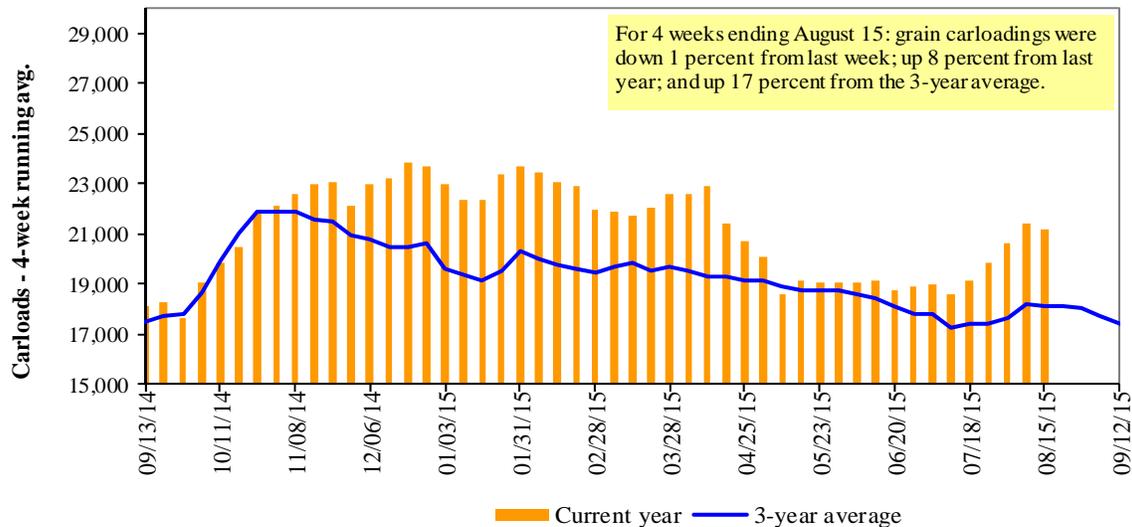
Table 4

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
08/15/15	1,419	2,722	9,680	1,028	4,859	19,708	3,721	4,434
This week last year	1,468	2,716	8,016	722	4,994	17,916	5,140	5,459
2015 YTD	65,219	95,230	315,667	27,912	164,122	668,150	130,302	142,373
2014 YTD	59,453	93,926	278,790	26,750	181,328	640,247	142,228	169,751
2015 YTD as % of 2014 YTD	110	101	113	104	91	104	92	84
Last 4 weeks as % of 2014 ¹	119	96	119	131	91	108	81	90
Last 4 weeks as % of 3-yr avg. ²	158	106	115	135	111	117	101	92
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

¹The past 4 weeks of this year as a percent of the same 4 weeks last year.

²The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

Figure 3**Total Weekly U.S. Class I Railroad Grain Car Loadings**

Source: Association of American Railroads

Table 5

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Sep-15	Sep-14	Oct-15	Oct-14	Nov-15	Nov-14	Dec-15	Dec-14
8/20/2015								
BNSF ³								
COT grain units	no bids	no offer	no bids	no offer	no bids	no offer	no bids	no offer
COT grain single-car ⁵	0 . . 7	no offer	1	no offer	1	no offer	1	no offer
UP ⁴								
GCAS/Region 1	no bids	no offer	10	1561	no bids	817	n/a	n/a
GCAS/Region 2	no bids	802	10	2501	10	1463	n/a	n/a

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

²Average premium/discount to tariff, last auction

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

⁴UP - 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.

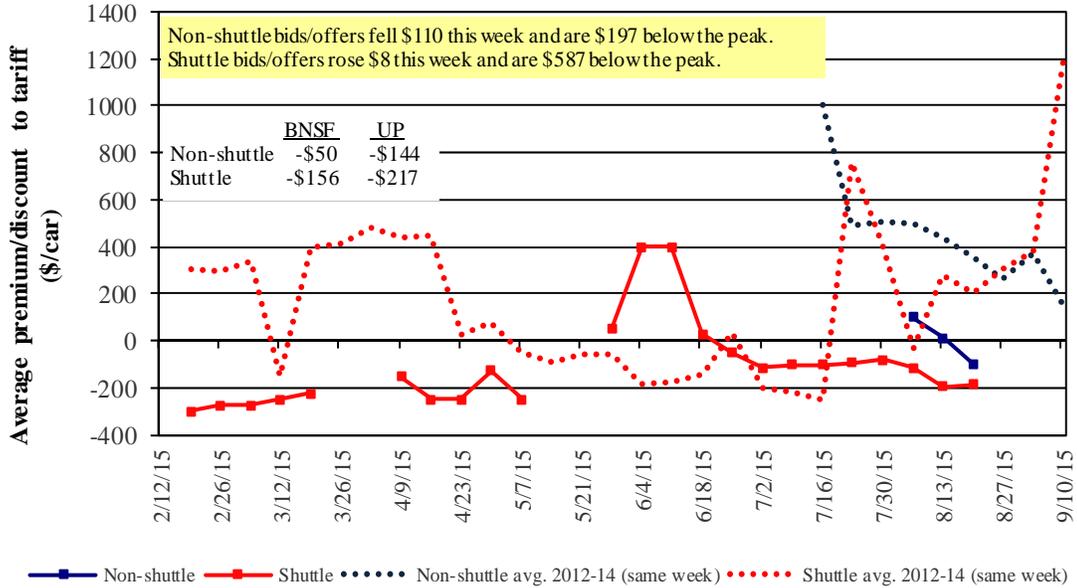
⁵Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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 5

Bids/Offers for Railcars to be Delivered in September 2015, Secondary Market

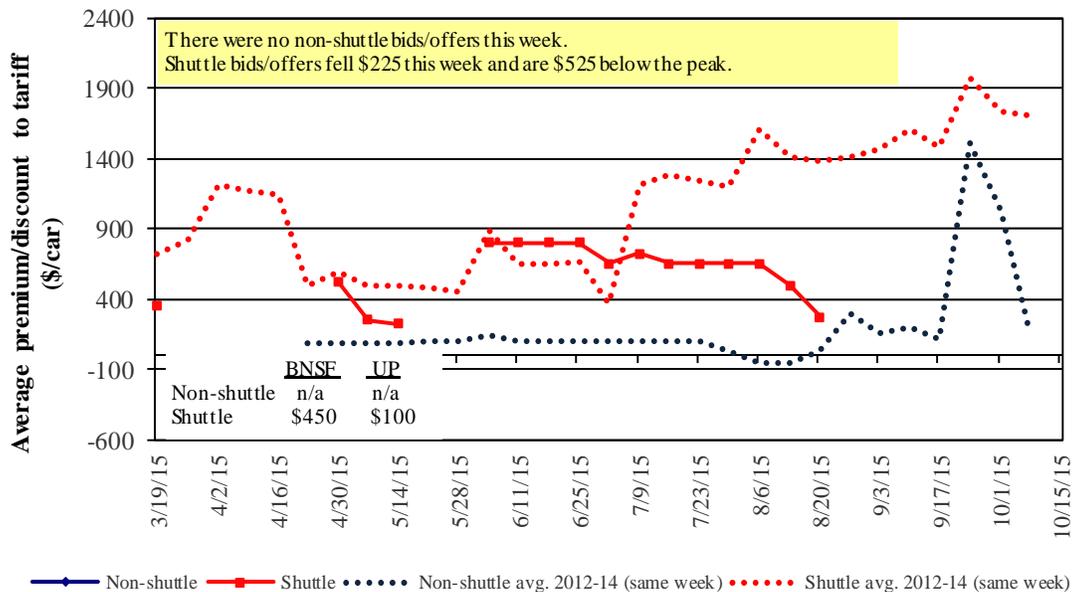


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in October 2015, Secondary Market

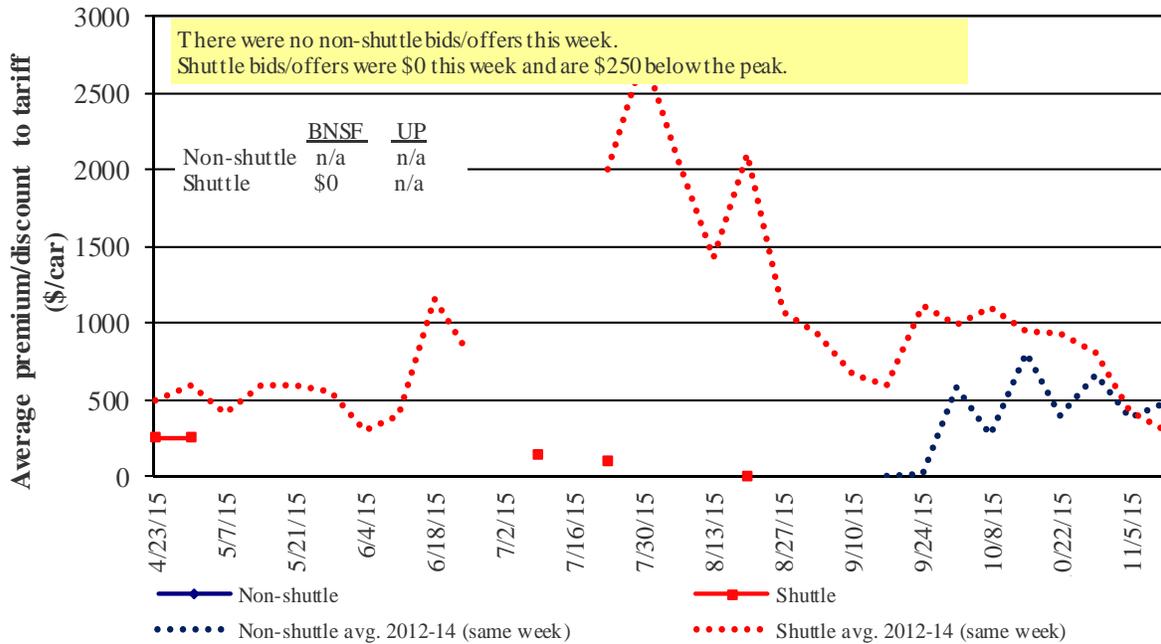


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 4

Bids/Offers for Railcars to be Delivered in November 2015, 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 Railcar Market (\$/car)¹

Week ending	Delivery period					
	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16
Non-shuttle						
BNSF-GF	(50)	n/a	n/a	n/a	n/a	n/a
Change from last week	(125)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(144)	n/a	n/a	n/a	n/a	n/a
Change from last week	(94)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(1,144)	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(156)	450	-	n/a	n/a	n/a
Change from last week	7	(50)	n/a	n/a	n/a	n/a
Change from same week 2014	(1,729)	(3,550)	n/a	n/a	n/a	n/a
UP-Pool	(217)	100	n/a	n/a	n/a	n/a
Change from last week	8	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(492)	(3,250)	n/a	n/a	n/a	n/a

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

²Shuttle 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 James B. Joiner Co., Tradewest Brokerage Co.

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute 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. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
8/1/2015	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,605	\$81	\$36.60	\$1.00	3	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$30	\$41.44	\$1.13	13	
	Wichita, KS	Los Angeles, CA	\$6,950	\$153	\$70.54	\$1.92	5	
	Wichita, KS	New Orleans, LA	\$4,243	\$142	\$43.55	\$1.19	1	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	\$126	\$65.66	\$1.79	5	
	Northwest KS	Galveston-Houston, TX	\$4,511	\$156	\$46.35	\$1.26	0	
	Amarillo, TX	Los Angeles, CA	\$4,710	\$217	\$48.93	\$1.33	-1	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,328	\$161	\$34.65	\$0.88	-2	
	Toledo, OH	Raleigh, NC	\$5,555	\$0	\$55.16	\$1.40	9	
	Des Moines, IA	Davenport, IA	\$2,168	\$34	\$21.87	\$0.56	2	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$0	\$47.28	\$1.20	9	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$0	\$40.75	\$1.04	12	
	Des Moines, IA	Little Rock, AR	\$3,308	\$100	\$33.84	\$0.86	-1	
Soybeans	Des Moines, IA	Los Angeles, CA	\$4,852	\$292	\$51.08	\$1.30	-13	
	Minneapolis, MN	New Orleans, LA	\$3,799	\$149	\$39.20	\$1.07	1	
	Toledo, OH	Huntsville, AL	\$4,676	\$0	\$46.43	\$1.26	17	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$0	\$55.86	\$1.52	9	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$0	\$43.38	\$1.18	22	
Champaign-Urbana, IL	New Orleans, LA	\$3,974	\$161	\$41.06	\$1.12	0		
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$88	\$40.13	\$1.09	1	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$69	\$39.60	\$1.08	7	
	Chicago, IL	Albany, NY	\$4,723	\$0	\$46.90	\$1.28	9	
	Grand Forks, ND	Portland, OR	\$5,611	\$152	\$57.23	\$1.56	1	
	Grand Forks, ND	Galveston-Houston, TX	\$6,532	\$158	\$66.44	\$1.81	1	
	Northwest KS	Portland, OR	\$5,478	\$256	\$56.94	\$1.55	-2	
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$185	\$53.28	\$1.35	-5	
	Sioux Falls, SD	Tacoma, WA	\$5,130	\$170	\$52.63	\$1.34	-5	
	Champaign-Urbana, IL	New Orleans, LA	\$3,147	\$161	\$32.85	\$0.83	-2	
	Lincoln, NE	Galveston-Houston, TX	\$3,610	\$99	\$36.83	\$0.94	-4	
	Des Moines, IA	Amarillo, TX	\$3,690	\$126	\$37.89	\$0.96	-2	
	Minneapolis, MN	Tacoma, WA	\$5,180	\$184	\$53.26	\$1.35	-5	
	Council Bluffs, IA	Stockton, CA	\$4,600	\$190	\$47.57	\$1.21	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,690	\$170	\$58.19	\$1.58	-4	
Soybeans	Minneapolis, MN	Portland, OR	\$5,710	\$185	\$58.54	\$1.59	-5	
	Fargo, ND	Tacoma, WA	\$5,580	\$151	\$56.91	\$1.55	-4	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$186	\$45.79	\$1.25	0	
	Toledo, OH	Huntsville, AL	\$3,851	\$0	\$38.24	\$1.04	22	
	Grand Island, NE	Portland, OR	\$5,360	\$262	\$55.83	\$1.52	-2	

¹A unit train refers to shipments of at least 25 cars. Shuttle train rates are 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 lbs./bu., wheat & soybeans 60 lbs./bu.

³Percentage change year over year calculated using tariff rate plus fuel surcharge

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

*Regional economic areas defined by the Bureau of Economic Analysis (BEA)

Table 8

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

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel		Percent change Y/Y ⁴	
				surchage per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$7,648	\$161	\$79.79	\$2.17	11
	OK	Cuautitlan, EM	\$6,714	\$195	\$70.59	\$1.92	-2
	KS	Guadalajara, JA	\$7,159	\$189	\$75.07	\$2.04	-3
	TX	Salinas Victoria, NL	\$4,086	\$74	\$42.50	\$1.16	2
Corn	IA	Guadalajara, JA	\$8,427	\$222	\$88.37	\$2.24	-1
	SD	Celaya, GJ	\$7,780	\$210	\$81.64	\$2.07	-5
	NE	Queretaro, QA	\$7,618	\$197	\$79.86	\$2.03	-3
	SD	Salinas Victoria, NL	\$6,035	\$160	\$63.30	\$1.61	-4
	MO	Tlalnepantla, EM	\$6,963	\$192	\$73.11	\$1.86	-3
	SD	Torreon, CU	\$7,050	\$176	\$73.83	\$1.87	-2
Soybeans	MO	Bojay (Tula), HG	\$8,365	\$187	\$87.38	\$2.38	0
	NE	Guadalajara, JA	\$8,929	\$214	\$93.42	\$2.54	-1
	IA	El Castillo, JA	\$9,270	\$209	\$96.85	\$2.63	-1
	KS	Torreon, CU	\$7,226	\$133	\$75.19	\$2.04	0
Sorghum	TX	Guadalajara, JA	\$7,150	\$137	\$74.45	\$1.89	-2
	NE	Celaya, GJ	\$7,404	\$191	\$77.60	\$1.97	-4
	KS	Queretaro, QA	\$7,255	\$120	\$75.35	\$1.91	4
	NE	Salinas Victoria, NL	\$5,883	\$141	\$61.54	\$1.56	3
	NE	Torreon, CU	\$6,662	\$157	\$69.67	\$1.77	0

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.

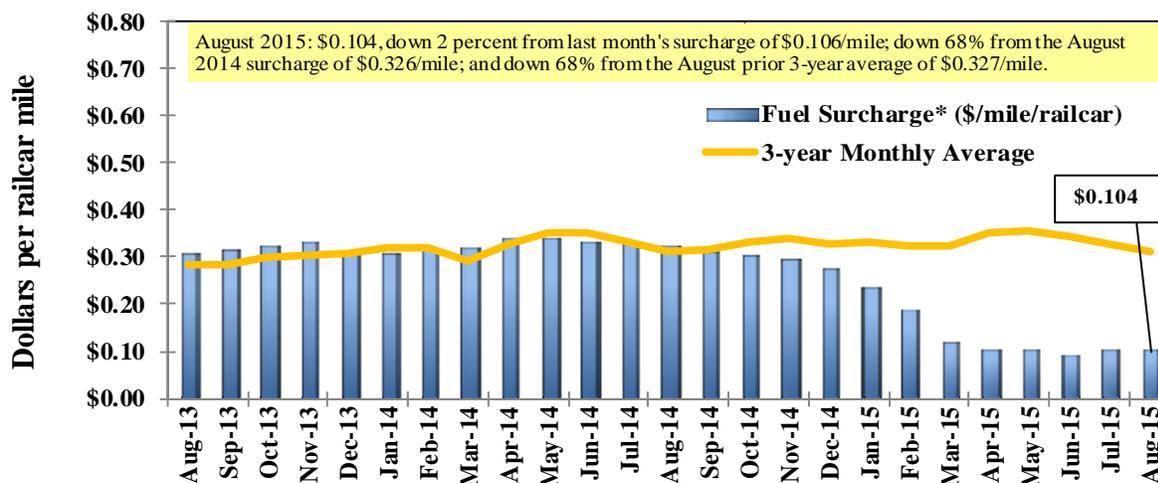
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009

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

⁴Percentage change 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 Average¹

¹ 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.

** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011.

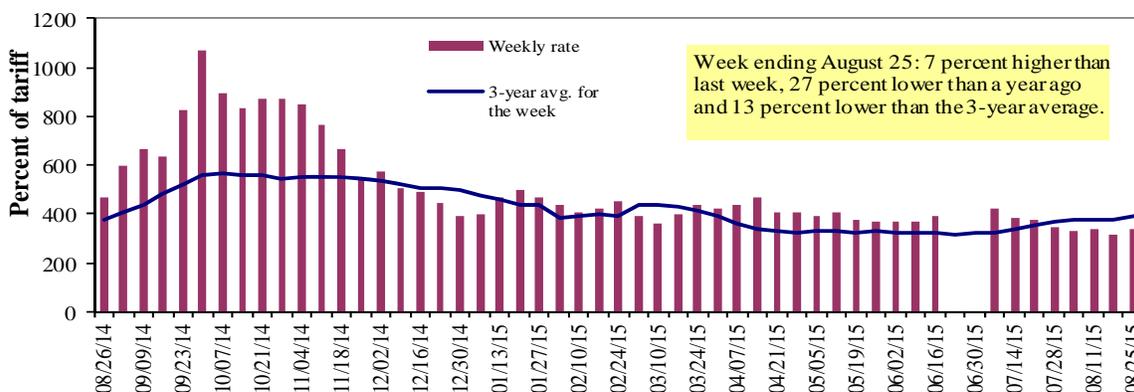
***CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River Barge Freight Rate^{1,2}



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

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate¹	8/25/2015	393	340	340	300	302	302	300
	8/18/2015	380	330	317	258	293	293	272
\$/ton	8/25/2015	24.33	18.09	15.78	11.97	14.16	12.20	9.42
	8/18/2015	23.52	17.56	14.71	10.29	13.74	11.84	8.54
Current week % change from the same week:								
	Last year	-25	-32	-27	-34	-39	-39	-34
	3-year avg. ²	-13	-18	-13	-18	-23	-23	-17
Rate¹	September	508	500	502	458	497	497	457
	November	588	518	518	422	497	497	387

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds; missing data due to flooding

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

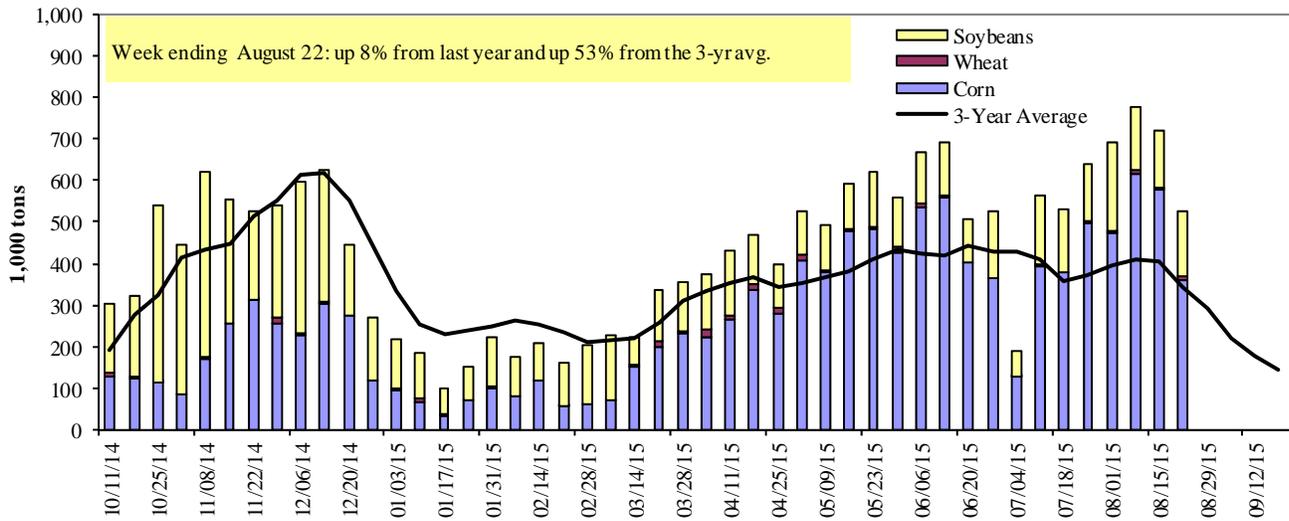
$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton})/100$$

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



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)

Week ending 08/22/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	121	0	20	0	141
Winfield, MO (L25)	215	3	41	13	271
Alton, IL (L26)	331	9	114	13	467
Granite City, IL (L27)	362	8	154	13	536
Illinois River (L8)	68	1	0	0	69
Ohio River (L52)	30	54	18	0	102
Arkansas River (L1)	0	8	0	0	8
Weekly total - 2015	392	70	172	13	646
Weekly total - 2014	472	72	52	3	599
2015 YTD ¹	14,392	1,254	6,633	160	22,440
2014 YTD	15,170	1,757	4,778	129	21,834
2015 as % of 2014 YTD	95	71	139	124	103
Last 4 weeks as % of 2014 ²	108	94	318	219	125
Total 2014	20,693	2,181	11,813	258	34,946

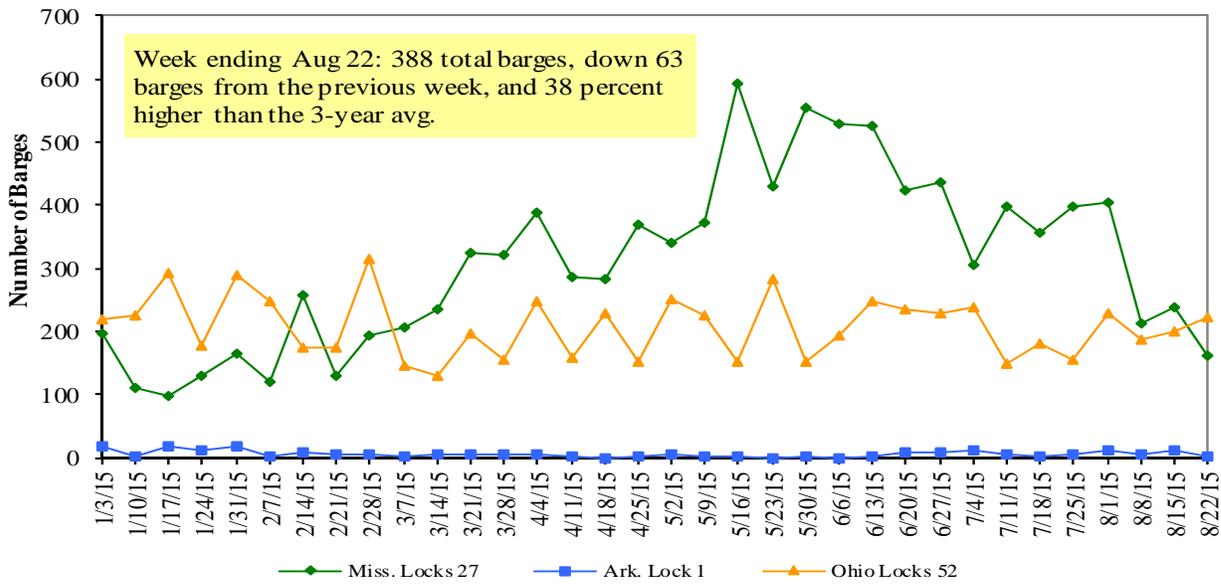
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

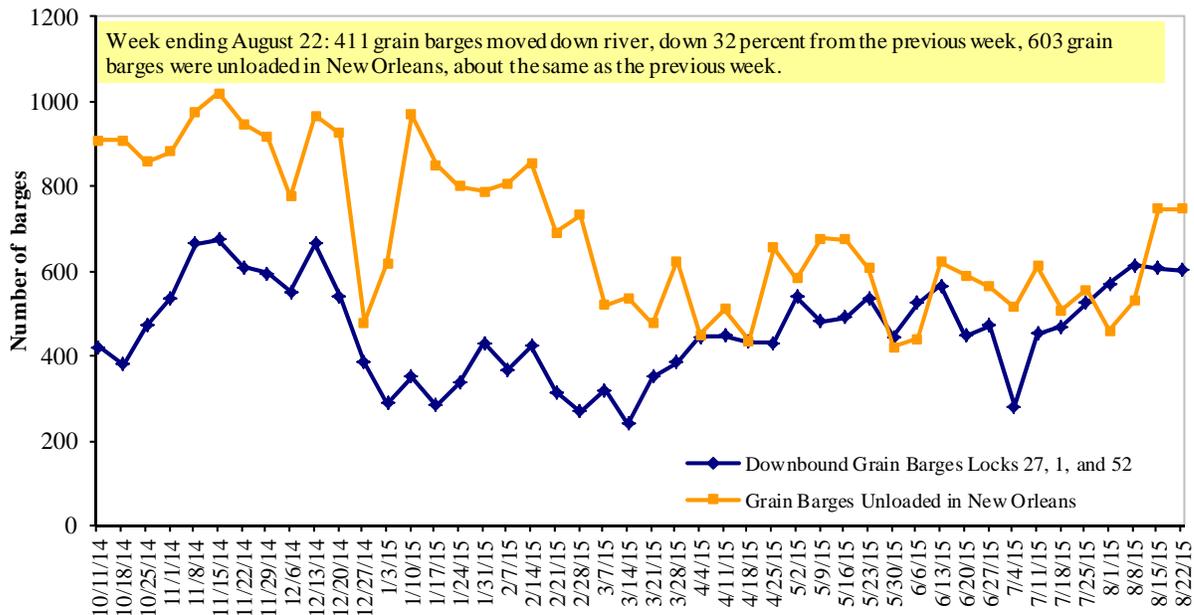
Source: U.S. Army Corps of Engineers

Figure 11
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River 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 Prices¹, Week Ending 8/24/2015 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.647	-0.049	-1.208
	New England	2.739	-0.064	-1.216
	Central Atlantic	2.777	-0.039	-1.158
	Lower Atlantic	2.529	-0.054	-1.242
II	Midwest ²	2.487	-0.052	-1.276
III	Gulf Coast ³	2.414	-0.064	-1.318
IV	Rocky Mountain	2.592	-0.035	-1.283
V	West Coast	2.767	-0.064	-1.243
	West Coast less California	2.610	-0.080	-1.311
	California	2.894	-0.051	-1.190
Total	U.S.	2.561	-0.054	-1.260

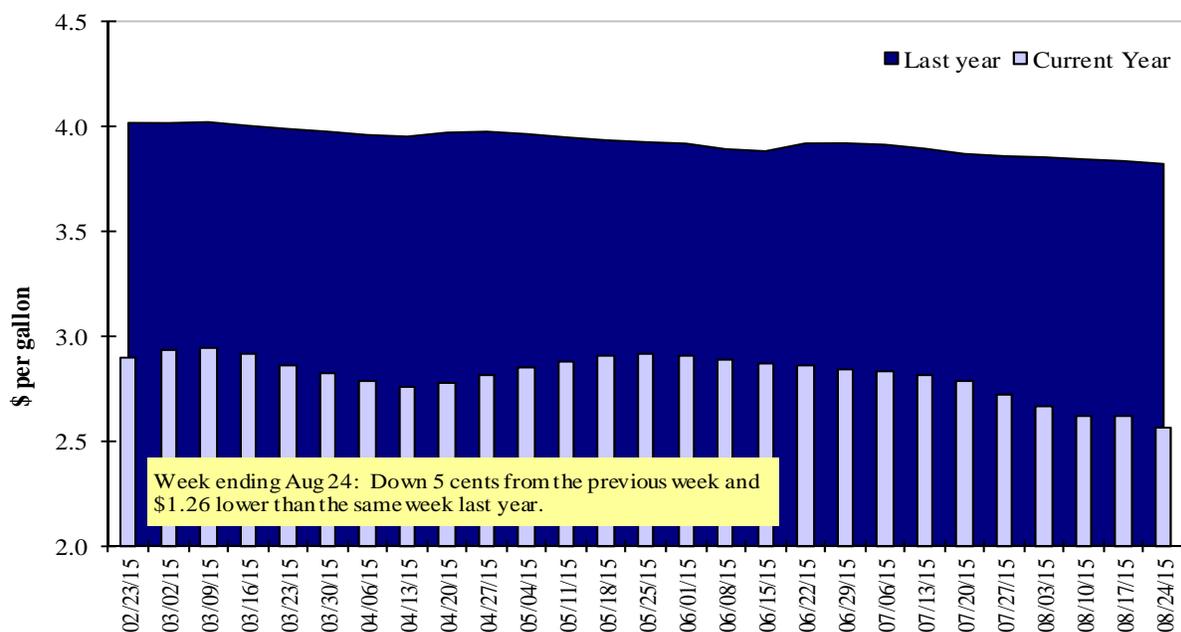
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

²Same as North Central ³Same as South Central

Source: Energy Information Administration/U.S. Department of Energy (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					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export Balances¹									
8/13/2015	1,326	863	1,909	979	232	5,308	3,132	1,524	9,964
This week year ago	1,574	1,274	1,875	1,023	118	5,864	3,847	1,851	11,562
Cumulative exports-marketing year²									
2014/15 YTD	1,219	850	1,029	644	210	3,952	43,307	49,235	96,494
2013/14 YTD	1,708	934	1,549	739	70	4,999	44,842	44,213	94,054
YTD 2014/15 as % of 2013/14	71	91	66	87	300	79	97	111	103
Last 4 wks as % of same period 2013/14	85	70	102	101	180	92	130	108	107
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year 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 Importers¹ of U.S. Corn

Week ending 08/13/2015	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2011-2013
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	1,014	12,086	11,517	5	10,079
Mexico	2,531	10,899	10,709	2	8,145
Korea	1	3,919	4,792	(18)	2,965
Colombia	155	4,490	3,325	35	3,461
Taiwan	35	1,803	2,067	(13)	1,238
Top 5 Importers	3,736	33,198	32,410	2	25,887
Total US corn export sales	5,653	47,439	48,689	(3)	34,445
% of Projected	12%	101%	100%		
Change from prior week	1,077	283	70		
Top 5 importers' share of U.S. corn export sales	66%	70%	67%		75%
USDA forecast, August 2015	47,074	47,074	48,855	(4)	
Corn Use for Ethanol USDA forecast, August 2015	133,350	132,080	130,404	1	

(n) indicates negative number.

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

²Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/

³FAS Marketing Year Ranking Reports - http://apps.fas.usda.gov/export-sales/myrkaug.htm; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 08/13/2015	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2011-13
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	4,026	29,718	28,015	6	24,211
Mexico	847	3,425	3,279	4	2,971
Indonesia	63	1,890	2,490	(24)	1,895
Japan	361	2,276	1,904	20	1,750
Taiwan	160	1,379	1,351	2	1,055
Top 5 importers	5,457	38,689	37,038	4	31,882
Total US soybean export sales	10,461	50,758	46,064	10	39,169
% of Projected	22%	102%	103%		
Change from prior week	1,444	20	(116)		
Top 5 importers' share of U.S. soybean export sales	52%	76%	80%		81%
USDA forecast, August 2015	47,003	49,728	44,632	11	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
http://www.fas.usda.gov/esrquery/³ FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 08/13/2015	Total Commitments ²		% change current MY from last MY	Exports ³ 3-yr avg 2012-2014
	2015/16 Current MY	2014/15 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	839	1,137	(26)	3,113
Mexico	934	1,319	(29)	2,807
Nigeria	769	1,062	(28)	2,512
Philippines	723	782	(8)	2,105
Brazil	235	1,084	(78)	2,091
Korea	436	659	(34)	1,273
Taiwan	401	413	(3)	1,007
Indonesia	146	285	(49)	751
Colombia	209	225	(7)	662
Thailand	142	159		618
Top 10 importers	4,692	6,965	(33)	16,939
Total US wheat export sales	9,260	10,863	(15)	26,361
% of Projected	37%	47%		
Change from prior week	314	208		
Top 10 importers' share of U.S. wheat export sales	51%	64%		64%
USDA forecast, August 2015	25,204	23,270	8	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report,
or Export Sales Query--http://www.fas.usda.gov/esrquery/³ 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 08/20/15	Previous Week ¹	Current Week as % of Previous	2015 YTD ¹	2014 YTD ¹	2015 YTD as % of 2014 YTD	Last 4-weeks as % of		Total ¹ 2014
							2014	3-yr. avg.	
Pacific Northwest									
Wheat	99	370	27	6,726	8,036	84	84	66	12,436
Corn	62	93	67	6,287	6,278	100	45	99	7,781
Soybeans	0	0	n/a	4,071	4,486	91	n/a	3	12,887
Total	161	463	35	17,084	18,800	91	62	71	33,104
Mississippi Gulf									
Wheat	78	71	110	2,857	3,195	89	75	52	4,495
Corn	641	624	103	19,797	20,994	94	113	157	30,912
Soybeans	206	329	63	12,097	10,515	115	397	135	29,087
Total	926	1,023	90	34,750	34,704	100	126	125	64,495
Texas Gulf									
Wheat	49	59	82	2,493	4,234	59	61	43	6,120
Corn	0	0	n/a	336	397	85	131	115	580
Soybeans	0	0	n/a	210	257	82	n/a	0	949
Total	49	59	82	3,039	4,889	62	65	46	7,649
Interior									
Wheat	34	7	476	906	803	113	23	110	1,400
Corn	136	109	124	3,904	3,541	110	77	134	5,677
Soybeans	10	56	17	2,014	2,279	88	91	125	4,312
Total	179	172	104	6,823	6,622	103	102	122	11,389
Great Lakes									
Wheat	33	82	40	551	353	156	241	506	935
Corn	25	23	109	340	111	306	288	205	288
Soybeans	0	0	n/a	86	51	170	n/a	0	988
Total	58	105	55	976	514	190	250	382	2,211
Atlantic									
Wheat	1	1	n/a	362	320	113	8	12	553
Corn	0	0	n/a	99	536	18	10	36	816
Soybeans	5	10	49	954	996	96	711	237	2,119
Total	6	11	54	1,414	1,852	76	23	45	3,487
U.S. total from ports²									
Wheat	293	590	50	13,893	16,941	82	77	61	25,939
Corn	864	849	102	30,762	31,856	97	91	139	46,054
Soybeans	221	395	56	19,431	18,584	105	226	84	50,342
Total	1,378	1,834	75	64,087	67,381	95	47	48	122,335

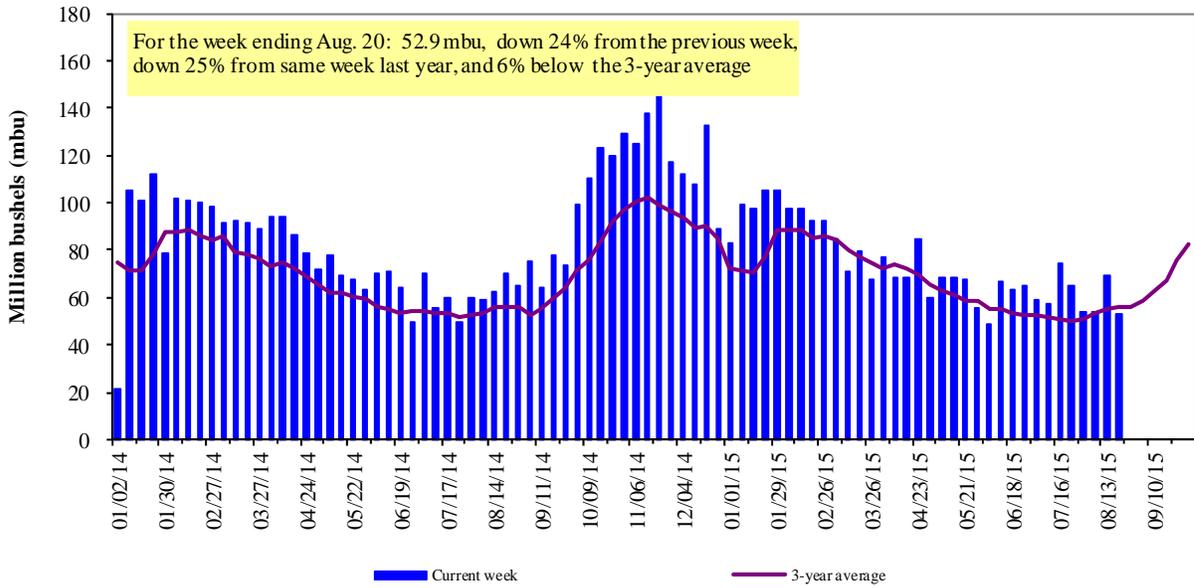
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

Source: Grain Inspection, Packers and Stockyards Administration/USDA (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 59 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2014.

Figure 14

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

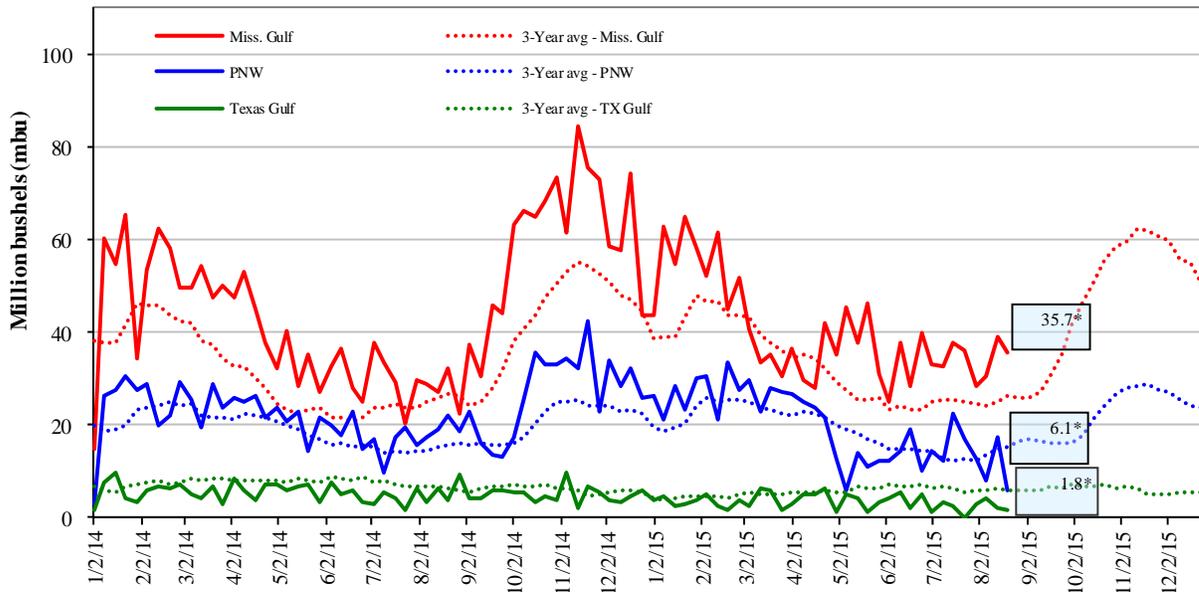


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

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



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

<u>August 20: % change from:</u>	<u>MSGulf</u>	<u>TX Gulf</u>	<u>U.S. Gulf</u>	<u>PNW</u>
Last week	down 9	down 18	down 10	down 65
Last year (same week)	up 11	down 53	up 4	down 72
3-yr avg. (4-wk mov. avg.)	up 34	down 716	up 15	down 63

Ocean Transportation

Table 17

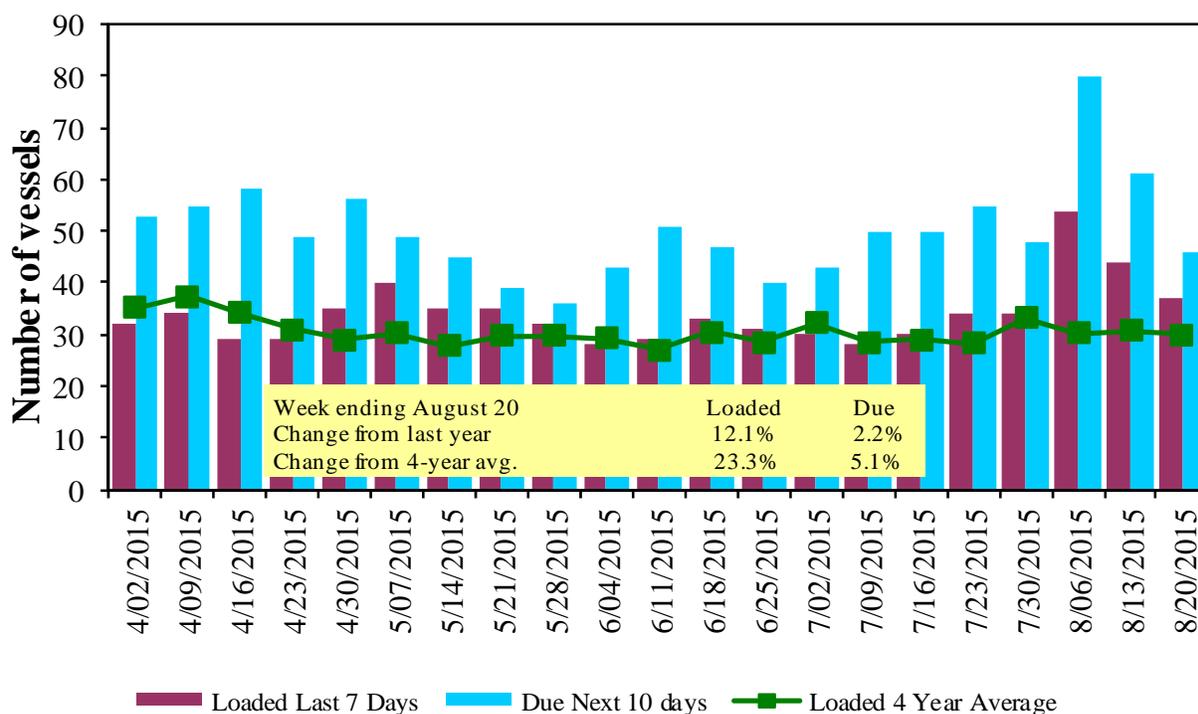
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
8/20/2015	37	37	46	8	n/a
8/13/2015	40	44	61	6	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	47	39	60	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

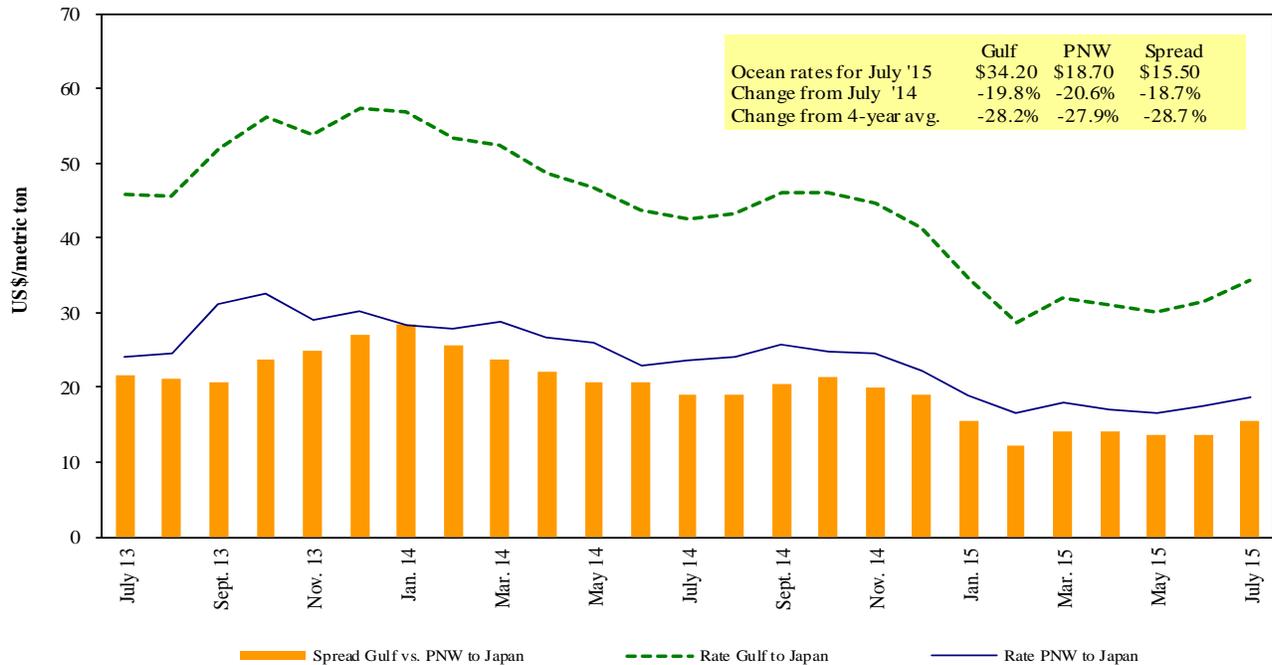
U.S. Gulf¹ Vessel Loading Activity



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

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 08/22/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Sep 10/20	58,000	36.00
U.S. Gulf	China	Heavy Grain	Jul 25/Aug 5	54,000	37.00
U.S. Gulf	Guatemala ¹	Corn	Jul 20/30	10,000	108.18
U.S. Gulf	Israel	Grain	Aug 21/28	32,000	25.00
PNW	China	Heavy Grain	Jun 1/10	60,000	14.00
Black Sea	Saudi Arabia	Grain	Aug 15/20	60,000	26.25
Brazil	China	Heavy Grain	Sep 20/30	60,000	24.25
Brazil	China	Grain	Aug 10/30	60,000	25.25
Brazil	China	Heavy Grain	Aug 15/25	60,000	24.50
Brazil	China	Grain	Aug 1/30	60,000	23.25
Brazil	China	Heavy Grain	Jul 10/15	60,000	24.75
Brazil	China	Heavy Grain	Jul 1/10	60,000	22.75
Brazil	China	Heavy Grain	Jun 25/30	60,000	26.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.75
Brazil	Egypt Med	Corn	Jul 5/15	50,000	19.50
Brazil	Thailand	Grain	Aug 1/5	60,000	28.50
River Plate	Jordan	Corn	Aug 15/20	35,000	41.00
River Plate	South Africa	Corn	Jul 1/10	25,000	24.25
Russia	Egypt Med	Grain	Aug 5/12	60,000	8.00
Thailand	Senegal	Rice Bggd	Jun 11/16	23,000	34.00
Uruguay	Algeria	Corn	Aug 3/8	20,000	38.00

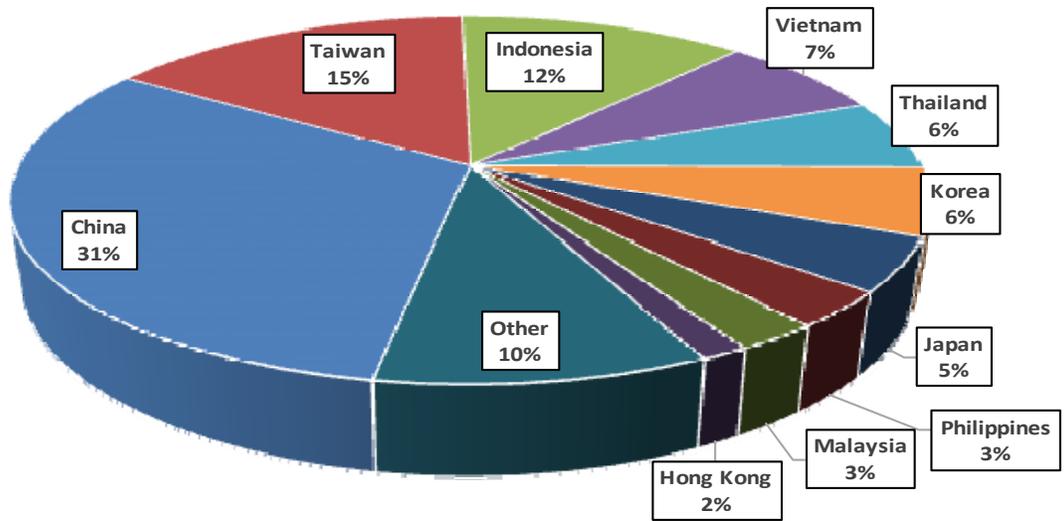
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

¹50 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)

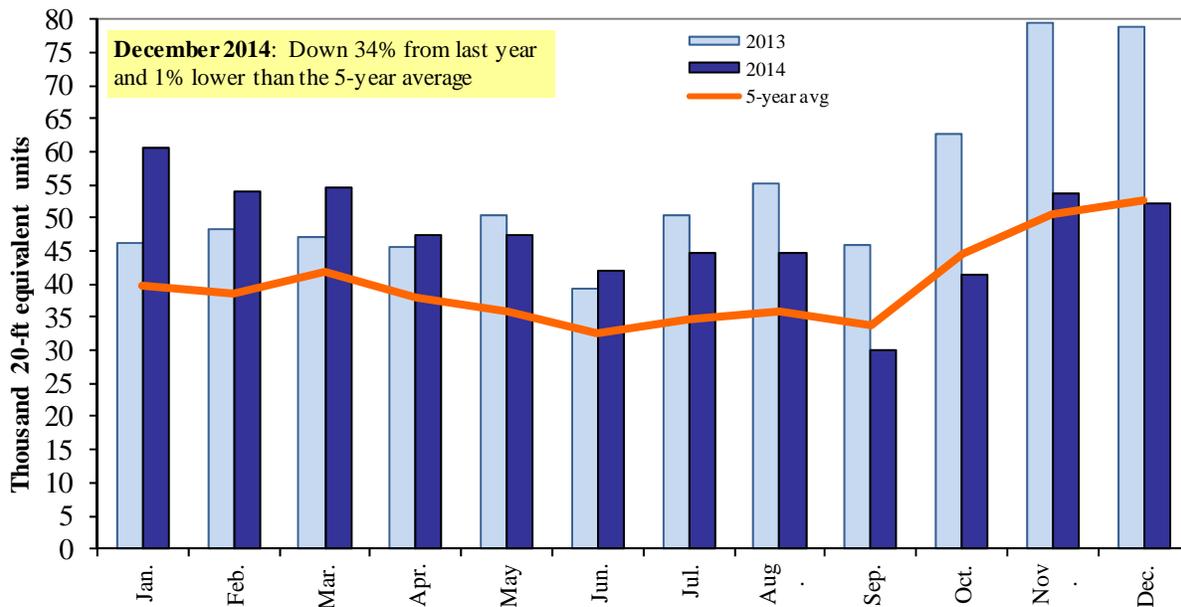
In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2014



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data
 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

Figure 19
Monthly Shipments of Containerized Grain to Asia



Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data.

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, 230330, and 120810.

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