



## WEEKLY HIGHLIGHTS

July 28, 2011

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### [Floods Increase Grain Barge Rates for Second Quarter](#)

St. Louis, MO, to New Orleans, LA, grain barge rates averaged 331 percent of tariff (\$13.21 per ton) for the second quarter, 51 percent higher than the 3-year average. Barge rates have escalated as high water has increased operating costs for barge companies. Last year, second quarter St. Louis rates were 219 percent of tariff (\$8.74 per ton). In 2008, when floods affected the upper Mississippi River, barge rates were 361 percent of tariff (\$14.41 per ton). When this year's corn harvest is underway, barge demand will increase. This week, barge operators are offering St. Louis to New Orleans rates for October deliveries at 593 percent of tariff (\$23.66 per ton). For more historic average weekly Mississippi River barge rates see

<http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateN&navID=AgriculturalTransportation&leftNav=AgriculturalTransportation&page=ATBarge&description=Barge%20Resources>

### [Transpacific Peak Shipping Season Forecast](#)

On July 26, the Journal of Commerce (JOC) hosted a webinar entitled, "Peak Shipping Season Forecast for Second Half 2011." JOC offered presentations from three experts in the field of cargo movements in the transpacific trade lanes. Overall, the panelists were confident that this year's peak season will be uneventful. An economist from the Port Import Export Reporting Service (PIERS) forecast that containerized import cargo from Asia will grow between 2 and 5 percent this peak season and containerized exports will increase between 7 and 15 percent. According to the Executive Director of the Agriculture Transportation Coalition, container availability will likely be good with the exception of the Upper Midwest and possibly the Pacific Northwest as the season blends into the beginning of 2012. Overcapacity in the container vessel fleet and competitive bulk ocean freight rates will likely keep downward pressure on export container rates this year.

### [Grain Inspections Rebound](#)

For the week ending July 21, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions reached 1.56 million metric tons (mmt), up 14 percent from the previous week but 3 percent below last year at this time. Inspections increased for each of the three major grains, with corn (.841 mmt) up 10 percent; wheat (.595 mmt) up 16 percent; and soybeans (.119 mmt) 35 percent above the past week. Soybean and wheat inspections were pushed up by increased shipments to Asia. Grain inspections jumped 68 percent in the Mississippi Gulf (.867 mmt) because of the rebound in corn shipments to Asia and Africa. Total Gulf grain inspections were the highest since April 14, 2011 (.908 mmt). Compared to last year, outstanding export sales (unshipped) are up for wheat and soybeans (Table 12), indicating a likely increase in demand for transportation in the near term.

## Snapshots by Sector

### [Rail](#)

U.S. railroads originated 19,351 **carloads of grain** during the week ending July 16, up 7 percent from last week, down 3 percent from last year, and 9 percent lower than the 3-year average.

During the week ending July 21, average August **non-shuttle secondary railcar bids/offers** were \$26 above tariff, up \$4 from last week. Average shuttle rates were \$575 below tariff, down \$150 from last week.

### [Barge](#)

During the week ending July 23, **barge grain movements** totaled 670,970 tons, 7 percent lower than the previous week and 23 percent lower than the same period last year.

During the week ending July 23, 441 grain barges **moved down river**, down 4.8 percent from last week, and 449 grain barges were **unloaded in New Orleans**, down 9.3 percent from the previous week.

### [Ocean](#)

During the week ending July 21, 34 **ocean-going grain vessels** were loaded in the Gulf, down 8 percent from last year. Forty-three vessels are expected to be loaded within the next 10 days, 7 percent less than the same period last year.

During the week ending July 21, ocean freight rate for shipping bulk grain from the Gulf to Japan was \$51 per metric ton (mt), down 1 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$27 per mt—2 percent less than the previous week.

### [Fuel](#)

During the week ending July 25, U.S. average **diesel fuel prices** increased 3 cents to \$3.95 per gallon—0.7 percent higher than the previous week and 35 percent higher than the same week last year.

# Feature Article/Calendar

## After-effects of Tsunami and Flooding Kept Second Quarter Bulk Ocean Freight Rates Low

Ocean freight rates for shipping bulk grains remained relatively low as persistent disruptions and political and economic turmoil in parts of the world continued to hinder the dry bulk trade. In addition to the continued unrest in the Middle East, economic problems with Eurozone and the recent natural disasters in Australia and Japan; all pose risks to the dry bulk trade, keeping the bulk ocean freight rates low.

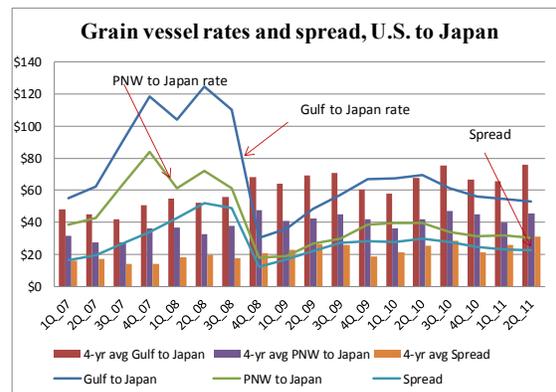
During the second quarter, ocean freight rates for shipping grain from the U.S. Gulf to Japan averaged about \$53 per metric ton (mt), 21 percent less than the previous quarter and 24 percent less than the same period a year ago (see table and figure). The rates for shipping a metric ton of grain from the Pacific Northwest (PNW) to Japan averaged a little over \$30, 24 percent less than the previous quarter and 23 percent less than a year earlier. The average cost of shipping grain from the U.S. Gulf to Europe was \$21.52 per mt, 14 percent less than the previous quarter and 23 percent less than a year ago. The spread between the Gulf and PNW rates averaged about \$23 per mt during the quarter. The rates and the spread were well below their 4-year averages.

Ocean freight rates for grain routes during 2 <sup>nd</sup> quarter 2011							
Route	Apr.	May	June	2 <sup>nd</sup> quarter 2011	Change from		
					1 <sup>st</sup> qtr '11	2 <sup>nd</sup> qtr '10	4-yr avg
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	52.90	52.75	53.25	52.97	-21.3	-24	-30
PNW to Japan	30.60	30.00	30.13	30.24	-23.8	-23	-33
U.S. Gulf to Europe	19.80	21.75	23.00	21.52	-14	-23	-46
Spread	22.30	22.75	23.12	22.72	-9	-24	-26

Source: O'Neil Commodity Consulting

In April, ocean freight rates slipped below post-recession levels as excess vessel supply was met by sluggish demand for bulk shipment. The fundamentals affecting a number of different commodities can influence bulk shipping rates, such as grain, coal, and iron ore.

Flooding in Queensland, Australia forced miners to suspend production at several important coal mines. U.S. Gulf region grain shipments declined as South American corn and soybean harvests competed with the U.S. grain shipping season. In addition to China restricting iron ore imports, there were holidays in parts of Asia, reducing cargo availability. Despite an increase in Chinese coal imports caused by higher domestic prices, there was not much demand in the dry bulk market during May and rates failed to improve from the low levels witnessed in the previous months. Steel production in China was hampered by power shortages and weak demand, reducing iron ore imports. Coking coal trade declined in Australia because of the continued effects of flooding. Although still relatively low, the rates got a slight bump in June by increased coal trade caused by increased demand from power-generating plants.



**Market Outlook:** Over the last few months, bulk ocean freight rates have been fluctuating within a \$2.00–\$3.00 trading range. It appears as if this trend will continue in the near future. As of July 21, the cost of shipping a metric ton of grain from the Gulf to Japan was \$51.00 and from PNW to Japan was \$27.00. Some analysts expect an improvement in the demand for iron ore due to increasing infrastructure development in India and China. Drought in Central and South China is expected to cause a drop in wheat production, prompting China to import more wheat. Suspension of the export bans in Russia and Ukraine is also expected to drive grain trade in coming months. As of June, the orderbook for new vessels—at 249.3 million deadweight (mdwt)—has shrunk sizably over the past two years. It represents 44 percent of the existing fleet, compared with the historical high of 70 percent in February 2009. Demolition of older vessels was also at higher levels in May and June, at 2.4 mdwt and 2.3 mdwt, respectively. However, higher commodity prices could hamper global demand. In addition, vessel supply is currently greater than demand. [Surajudeen.Olowolayemo@ams.usda.gov](mailto:Surajudeen.Olowolayemo@ams.usda.gov)

# Grain Transportation Indicators

Table 1

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

Week ending	Truck	Rail <sup>2</sup>	Barge	Ocean	
				Gulf	Pacific
07/27/11	265	121	217	228	191
07/20/11	263	117	239	230	195

<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)**

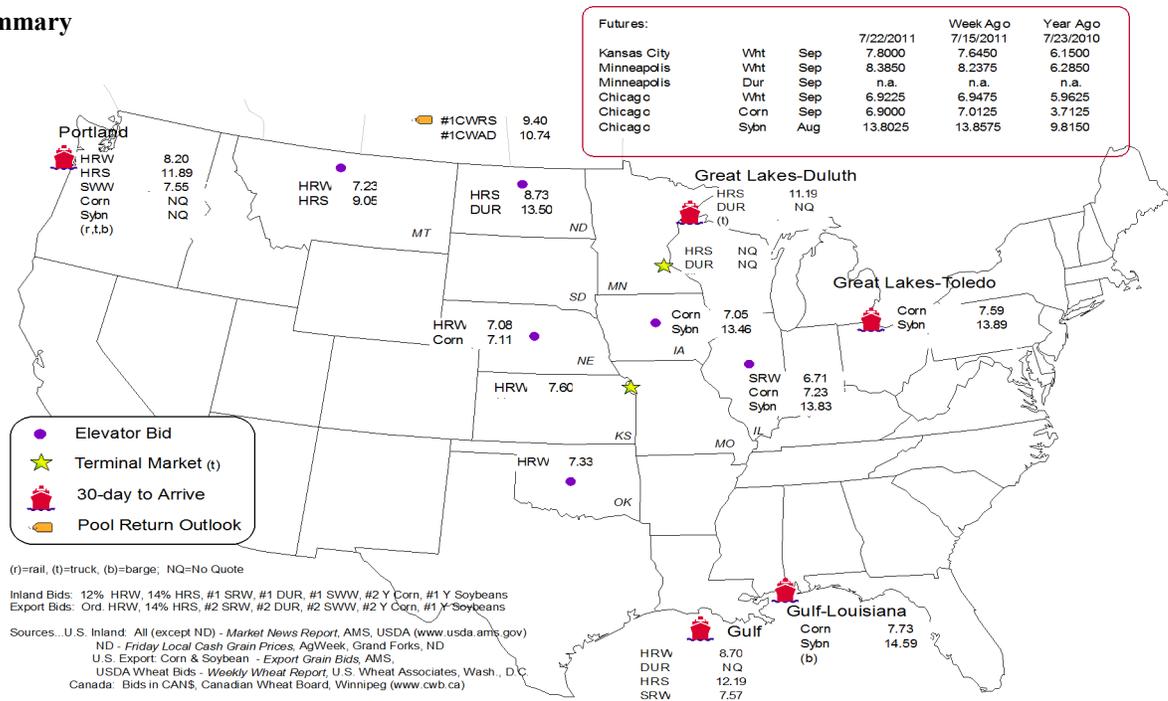
Commodity	Origin--Destination	7/22/2011	7/15/2011
Corn	IL--Gulf	-0.50	-0.72
Corn	NE--Gulf	-0.62	-0.82
Soybean	IA--Gulf	-1.13	-1.16
HRW	KS--Gulf	-1.10	-1.10
HRS	ND--Portland	-3.16	-3.65

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	Texas Gulf	Mexico	Northwest	East Gulf	
7/20/2011 <sup>P</sup>	3	520	1,391	3,653	184	5,751
7/13/2011 <sup>r</sup>	167	1,193	988	3,756	283	6,387
2011 YTD	21,409	57,696	27,129	110,225	15,844	232,303
2010 YTD	8,671	37,976	26,119	96,033	17,877	186,676
2011 YTD as % of 2010 YTD	247	152	104	115	89	124
Last 4 weeks as % of 2010 <sup>2</sup>	108	76	160	94	127	100
Last 4 weeks as % of 4-year avg. <sup>2</sup>	29	54	175	88	66	82
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100

<sup>1</sup> Data is incomplete as it is voluntarily provided

<sup>2</sup> Compared with same 4-weeks in 2010 and prior 4-year average.

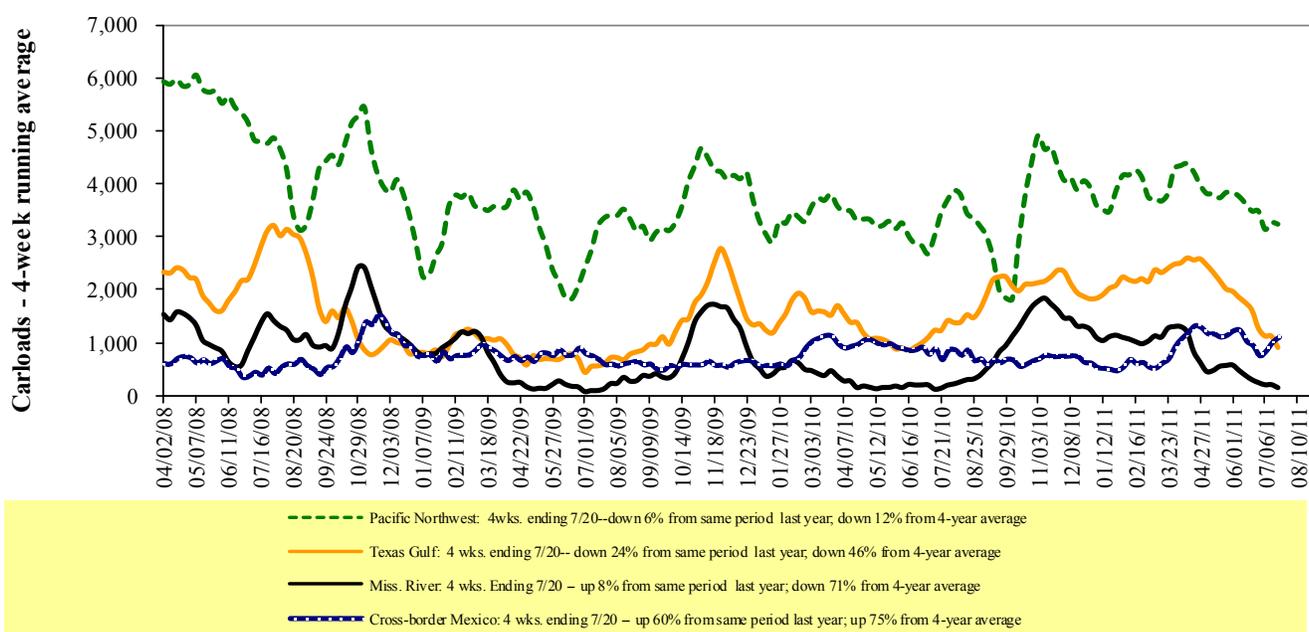
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

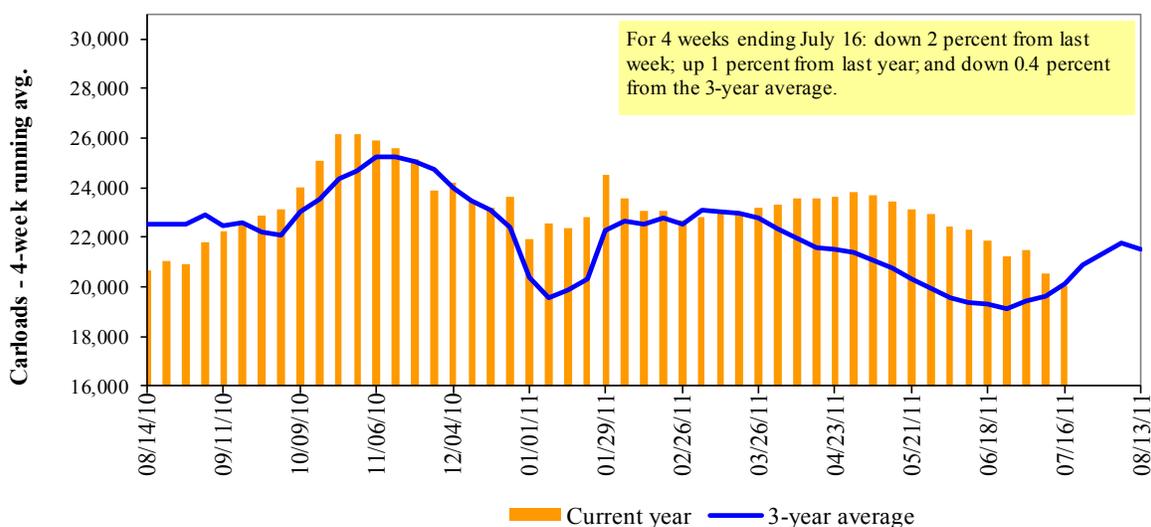
Table 4

**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
07/16/11	1,665	3,303	8,280	537	5,566	19,351	3,525	4,813
This week last year	2,300	2,927	9,884	601	4,229	19,941	3,783	5,627
2011 YTD	55,602	86,007	305,955	18,956	169,693	636,213	110,287	136,887
2010 YTD	59,627	82,525	269,572	20,160	141,919	573,803	105,985	140,024
2011 YTD as % of 2010 YTD	93	104	113	94	120	111	104	98
Last 4 weeks as % of 2010 <sup>1</sup>	81	102	98	108	114	101	103	112
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	75	105	98	114	105	99	104	103
Total 2010	111,935	159,836	546,901	35,807	295,361	1,149,840	203,038	265,835

<sup>1</sup>As a percent of the same period in 2009 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							
	Aug-11	Aug-10	Sep-11	Sep-10	Oct-11	Oct-10	Nov-11	Nov-10
<b>7/21/2011</b>								
BNSF <sup>3</sup>								
COT grain units	no offer	318	no offer	280	144	280	no offer	155
COT grain single-car <sup>5</sup>	no offer	6 . . 356	no offer	159 . . 303	0 . . 100	0 . . 244	6 . . 17	0 . . 179
UP <sup>4</sup>								
GCAS/Region 1	no bids	no bids	no bids	no bids	1	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	12	106	no offer	n/a	n/a

<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.

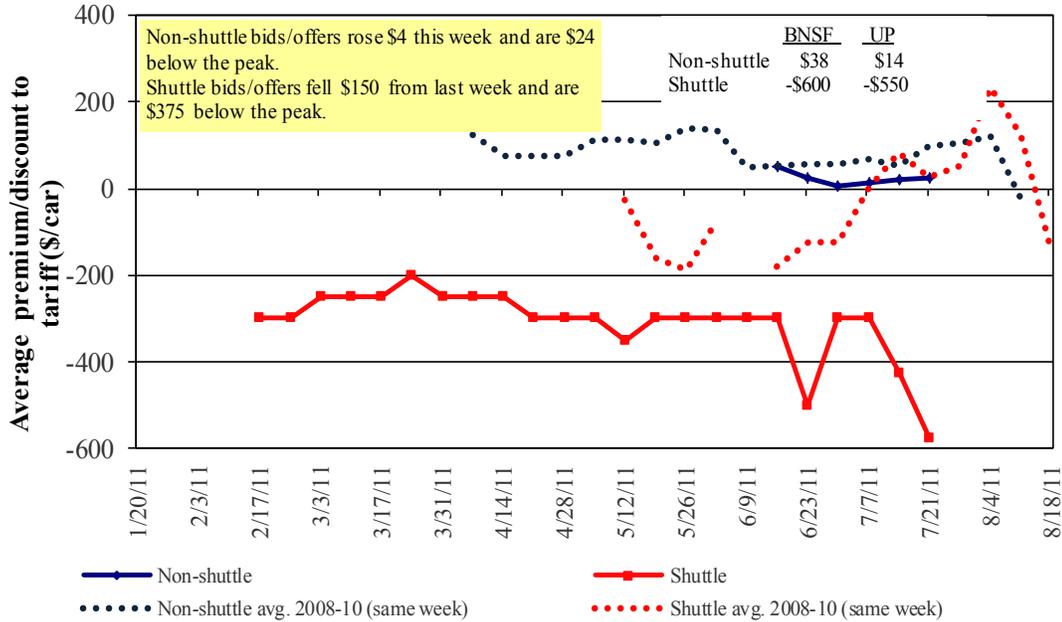
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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 August 2011, Secondary Market**

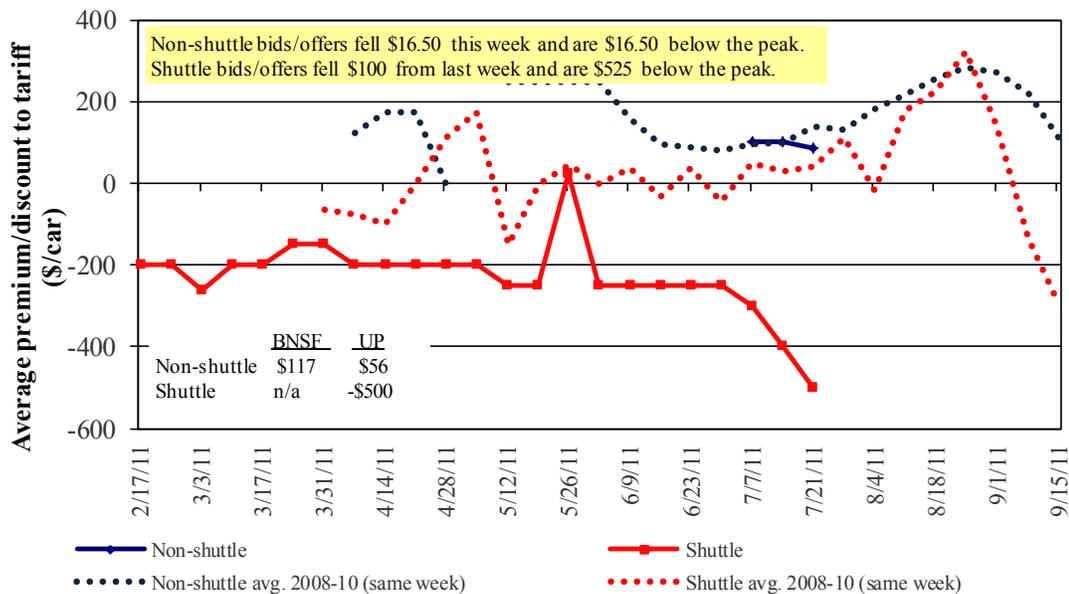


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in September 2011, Secondary Market**

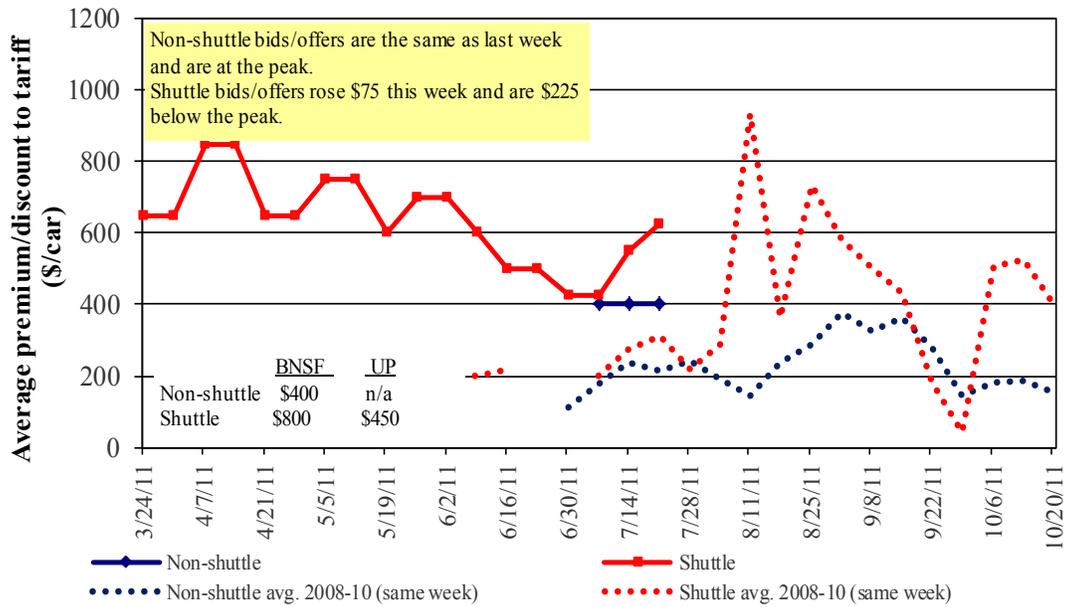


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

**Bids/Offers for Railcars to be Delivered in October 2011, 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					
	Aug-11	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12
<b>Non-shuttle</b>						
BNSF-GF	38	117	400	300	200	n/a
Change from last week	13	(33)	-	-	-	n/a
Change from same week 2010	(341)	(283)	100	n/a	n/a	n/a
UP-Pool	14	56	n/a	n/a	n/a	n/a
Change from last week	(5)	-	n/a	n/a	n/a	n/a
Change from same week 2010	(5)	(25)	n/a	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	(600)	n/a	800	400	n/a	n/a
Change from last week	(200)	n/a	n/a	-	n/a	n/a
Change from same week 2010	(775)	n/a	n/a	(25)	n/a	n/a
UP-Pool	(550)	(500)	450	250	-	n/a
Change from last week	(100)	(100)	(100)	(13)	-	n/a
Change from same week 2010	(600)	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:			Tariff	Fuel	Tariff plus surcharge per:		Percent
7/5/2011	Origin region*	Destination region*	rate/car	surcharge per car	metric ton	bushe <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$2,992	\$197	\$31.67	\$0.86	11
	Grand Forks, ND	Duluth-Superior, MN	\$2,822	\$116	\$29.18	\$0.79	16
	Wichita, KS	Los Angeles, CA	\$5,710	\$597	\$62.63	\$1.70	10
	Wichita, KS	New Orleans, LA	\$3,492	\$347	\$38.12	\$1.04	11
	Sioux Falls, SD	Galveston-Houston, TX	\$5,410	\$490	\$58.59	\$1.59	6
	Northwest KS	Galveston-Houston, TX	\$3,760	\$380	\$41.11	\$1.12	11
	Amarillo, TX	Los Angeles, CA	\$3,959	\$529	\$44.57	\$1.21	12
Corn	Champaign-Urbana, IL	New Orleans, LA	\$2,812	\$392	\$31.82	\$0.87	7
	Toledo, OH	Raleigh, NC	\$3,760	\$450	\$41.81	\$1.14	14
	Des Moines, IA	Davenport, IA	\$1,843	\$83	\$19.13	\$0.52	-1
	Indianapolis, IN	Atlanta, GA	\$3,196	\$338	\$35.09	\$0.96	12
	Indianapolis, IN	Knoxville, TN	\$2,760	\$217	\$29.56	\$0.80	12
	Des Moines, IA	Little Rock, AR	\$2,938	\$244	\$31.60	\$0.86	7
	Des Moines, IA	Los Angeles, CA	\$4,835	\$711	\$55.07	\$1.50	20
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,109	\$439	\$35.24	\$0.96	17
	Toledo, OH	Huntsville, AL	\$2,921	\$320	\$32.18	\$0.88	11
	Indianapolis, IN	Raleigh, NC	\$3,830	\$453	\$42.54	\$1.16	13
	Indianapolis, IN	Huntsville, AL	\$2,613	\$217	\$28.10	\$0.76	11
	Champaign-Urbana, IL	New Orleans, LA	\$3,156	\$392	\$35.24	\$0.96	10
<b>Shuttle Train</b>							
Wheat	Great Falls, MT	Portland, OR	\$3,239	\$343	\$35.57	\$0.97	13
	Wichita, KS	Galveston-Houston, TX	\$3,144	\$267	\$33.87	\$0.92	7
	Chicago, IL	Albany, NY	\$3,497	\$422	\$38.92	\$1.06	-3
	Grand Forks, ND	Portland, OR	\$4,702	\$593	\$52.58	\$1.43	12
	Grand Forks, ND	Galveston-Houston, TX	\$5,648	\$617	\$62.22	\$1.69	10
	Northwest KS	Portland, OR	\$4,727	\$624	\$53.13	\$1.45	11
	Minneapolis, MN	Portland, OR	\$4,680	\$722	\$53.64	\$1.46	13
Corn	Sioux Falls, SD	Tacoma, WA	\$4,640	\$661	\$52.64	\$1.43	13
	Champaign-Urbana, IL	New Orleans, LA	\$2,677	\$392	\$30.48	\$0.83	7
	Lincoln, NE	Galveston-Houston, TX	\$3,190	\$385	\$35.50	\$0.97	10
	Des Moines, IA	Amarillo, TX	\$3,330	\$307	\$36.12	\$0.98	7
	Minneapolis, MN	Tacoma, WA	\$4,680	\$716	\$53.59	\$1.46	13
	Council Bluffs, IA	Stockton, CA	\$4,080	\$741	\$47.87	\$1.30	13
	Soybeans	Sioux Falls, SD	Tacoma, WA	\$4,840	\$661	\$54.63	\$1.49
Minneapolis, MN		Portland, OR	\$4,830	\$722	\$55.13	\$1.50	11
Fargo, ND		Tacoma, WA	\$4,730	\$588	\$52.81	\$1.44	9
Council Bluffs, IA		New Orleans, LA	\$3,510	\$452	\$39.35	\$1.07	9
Toledo, OH		Huntsville, AL	\$2,536	\$320	\$28.36	\$0.77	13
Grand Island, NE		Portland, OR	\$4,520	\$638	\$51.23	\$1.39	11

<sup>1</sup>A unit train refers to shipments of at least 25 cars. Shuttle train rates are available for qualified shipments of 90-110 cars that meet railroad efficiency requirements.

<sup>2</sup>Approximate load per car = 111 short tons (100.7 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

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

Table 8

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

Effective date: 7/4/2011			Fuel				Percent
Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	surchage per car <sup>2</sup>	Tariff plus surcharge per: metric ton <sup>3</sup>	bushel <sup>3</sup>	change Y/Y <sup>4</sup>
Wheat	MT	Chihuahua, CI	\$7,491	\$627	\$82.95	\$2.26	15
	OK	Cuautilan, EM	\$6,610	\$649	\$74.17	\$2.02	13
	KS	Guadalajara, JA	\$7,210	\$884	\$82.70	\$2.25	11
	TX	Salinas Victoria, NL	\$3,656	\$263	\$40.04	\$1.09	12
Corn	IA	Guadalajara, JA	\$7,445	\$918	\$85.45	\$2.17	11
	SD	Penjamo, GJ	\$7,245	\$821	\$82.41	\$2.09	9
	NE	Queretaro, QA	\$6,802	\$832	\$78.00	\$1.98	14
	SD	Salinas Victoria, NL	\$5,360	\$624	\$61.14	\$1.55	13
	MO	Tlalnepantla, EM	\$5,959	\$811	\$69.17	\$1.76	15
	SD	Torreon, CU	\$6,248	\$687	\$70.86	\$1.80	13
Soybeans	MO	Bojay (Tula), HG	\$6,705	\$803	\$76.71	\$2.09	10
	NE	Guadalajara, JA	\$7,519	\$913	\$86.16	\$2.34	14
	IA	El Castillo, JA <sup>5</sup>	\$7,770	\$815	\$87.72	\$2.39	12
	KS	Torreon, CU	\$6,042	\$628	\$68.15	\$1.85	15
Sorghum	OK	Cuautilan, EM	\$5,350	\$623	\$61.03	\$1.55	18
	TX	Guadalajara, JA	\$6,289	\$534	\$69.71	\$1.77	12
	NE	Penjamo, GJ	\$6,905	\$845	\$79.18	\$2.01	8
	KS	Queretaro, QA	\$6,038	\$573	\$67.54	\$1.71	13
	NE	Salinas Victoria, NL	\$4,818	\$546	\$54.81	\$1.39	13
	NE	Torreon, CU	\$5,804	\$673	\$66.18	\$1.68	11

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

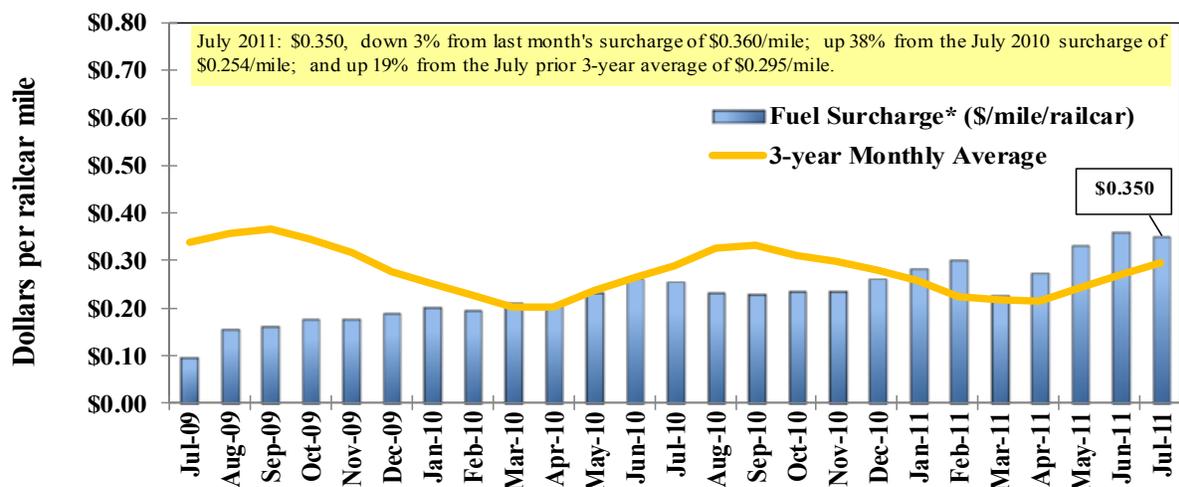
<sup>3</sup>Approximate load per car = 97.87 metric tons: Com & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

<sup>4</sup>Percentage change year over year calculated using tariff rate plus fuel surcharge

<sup>5</sup>Beginning 12/6/10, El Castillo, JA replaced Penjamo, GJ as the destination

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.

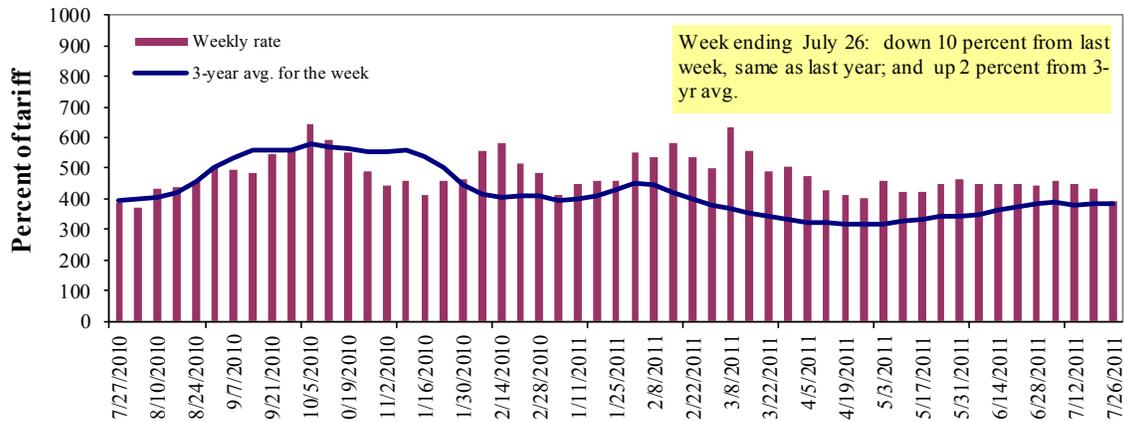
\*\* BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal. starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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<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

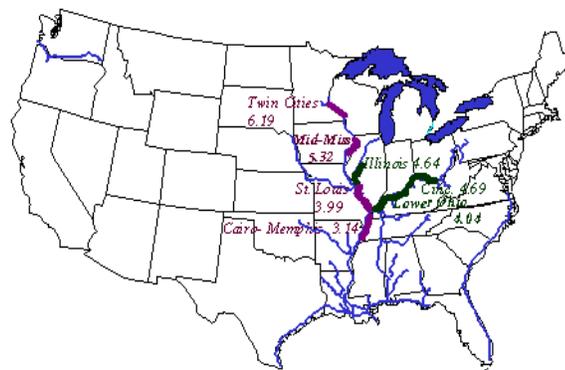
		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	7/26/2011	465	397	390	282	375	375	270
	7/19/2011	515	433	431	313	395	395	300
<b>\$/ton</b>	7/26/2011	28.78	21.12	18.10	11.25	17.59	15.15	8.48
	7/19/2011	31.88	23.04	20.00	12.49	18.53	15.96	9.42
<b>Current week % change from the same week:</b>								
	Last year	1	0	0	-6	-5	-5	-7
	3-year avg. <sup>2</sup>	2	-1	2	-1	19	19	6
<b>Rate<sup>1</sup></b>	August	500	445	440	388	425	425	350
	October	713	650	650	593	690	690	570

<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



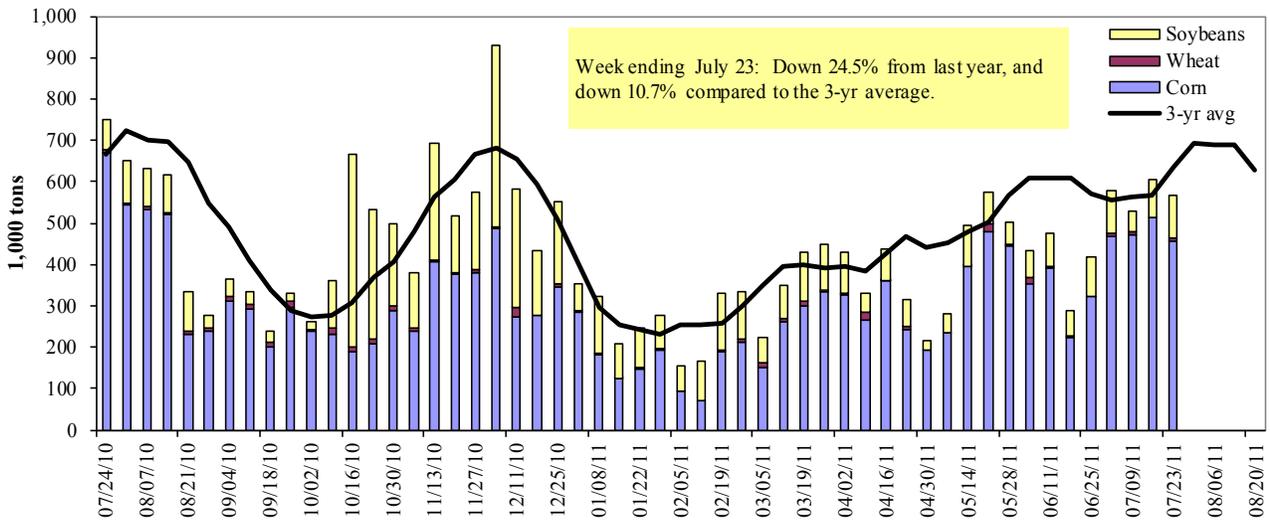
### Calculating barge rate per ton:

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

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/mvrini/omni/webrrpts/default.asp](http://www.mvr.usace.army.mil/mvrini/omni/webrrpts/default.asp))

Table 10

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

Week ending 7/23/2011	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	252	8	52	0	312
Winfield, MO (L25)	320	6	53	0	379
Alton, IL (L26)	425	8	88	8	529
Granite City, IL (L27)	456	8	103	8	574
<b>Illinois River (L8)</b>	127	2	17	0	146
<b>Ohio River (L52)</b>	22	27	11	2	62
<b>Arkansas River (L1)</b>	0	14	1	20	35
Weekly total - 2011	478	49	115	29	671
Weekly total - 2010	739	28	95	9	871
2011 YTD <sup>1</sup>	10,803	871	4,216	200	16,091
2010 YTD	13,774	689	4,587	266	19,316
2011 as % of 2010 YTD	78	126	92	75	83
Last 4 weeks as % of 2010 <sup>2</sup>	80	200	94	141	88
Total 2010	22,768	1,220	10,373	481	34,841

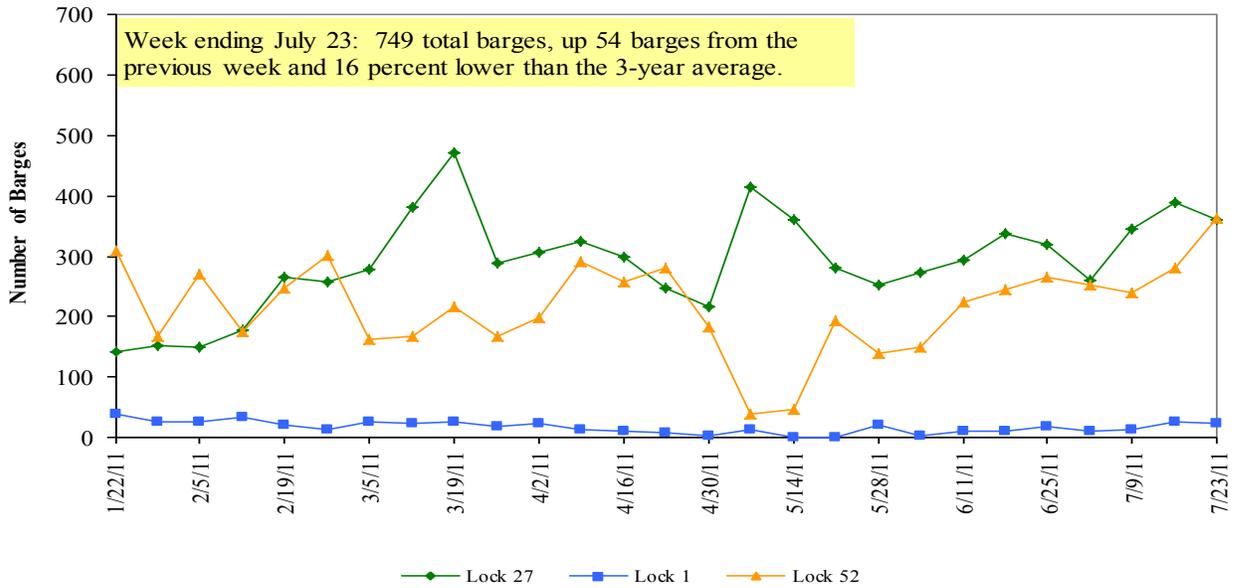
<sup>1</sup> Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

<sup>2</sup> As a percent of same period in 2010.

Note: Total may not add exactly, due to rounding

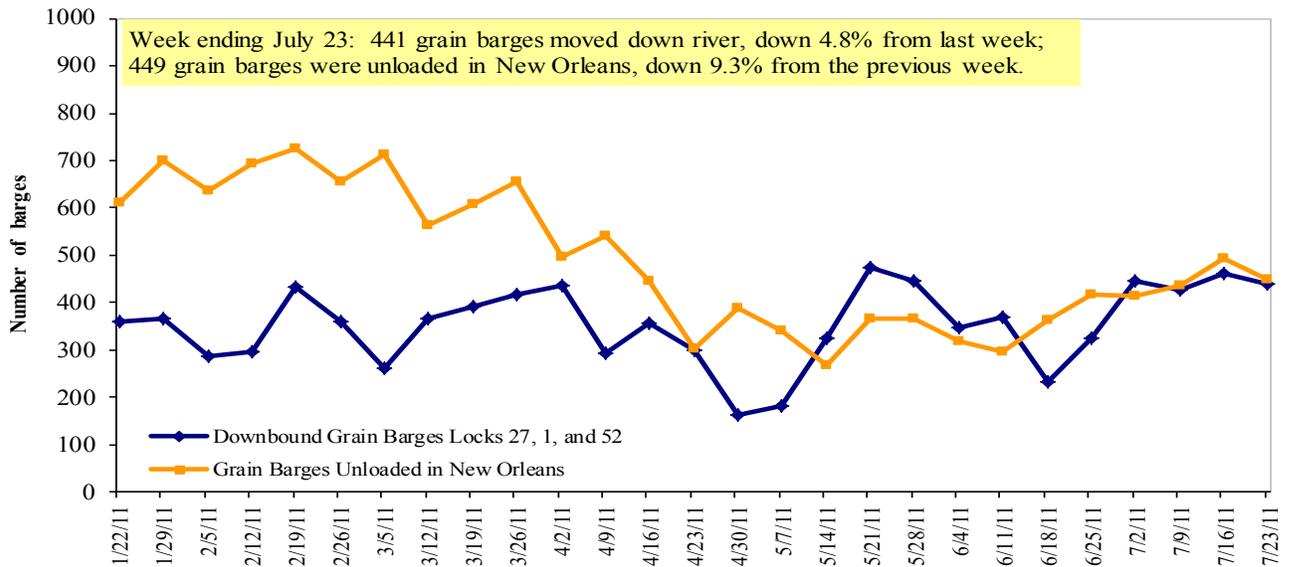
Source: U.S. Army Corps of Engineers ([www.mvr.usace.army.mil/mvrini/omni/webrrpts/default.asp](http://www.mvr.usace.army.mil/mvrini/omni/webrrpts/default.asp))

**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 7/25/2011 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.988	0.025	1.060
	New England	4.037	0.003	1.023
	Central Atlantic	4.090	0.024	1.070
	Lower Atlantic	3.940	0.028	1.060
II	Midwest <sup>2</sup>	3.925	0.022	1.034
III	Gulf Coast <sup>3</sup>	3.913	0.031	1.038
IV	Rocky Mountain	3.848	0.021	0.928
V	West Coast	4.038	0.033	0.978
	California	4.145	0.031	1.020
Total	U.S.	3.949	0.026	1.030

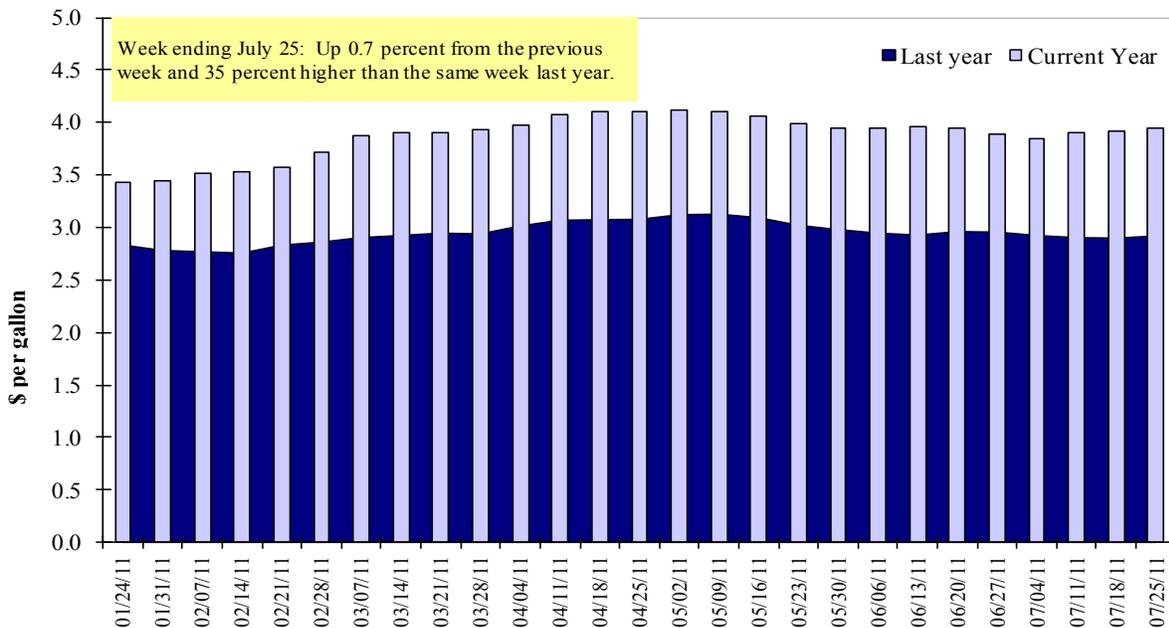
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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>									
7/14/2011	1,803	1,037	1,798	1,140	86	5,863	7,391	3,556	16,810
This week year ago	1,825	519	1,035	976	294	4,649	9,161	2,749	16,559
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2010/11 YTD	1,751	362	879	632	101	3,725	39,342	38,500	81,567
2009/10 YTD	1,317	291	598	559	64	2,828	41,339	37,578	81,745
YTD 2010/11 as % of 2009/10	133	124	147	113	158	132	95	102	100
Last 4 wks as % of same period 2009/10	108	189	181	120	29	131	88	129	107
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385
2008/09 Total	11,244	5,100	5,408	3,420	454	25,626	44,650	33,705	103,981

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

<sup>2</sup> Shipped export sales to date; the new marketing year 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 07/14/11	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2011/12 Next MY	2010/11 Current MY	2009/10 Last MY		
		- 1,000 mt -			- 1,000 mt -
Japan	952	14,183	15,089	(6)	14,343
Mexico	1,858	6,907	7,990	(14)	7,999
Korea	336	5,805	7,689	(25)	7,562
Taiwan	7	2,668	3,047	(12)	2,949
Egypt	40	3,071	2,907	6	2,935
<b>Top 5 importers</b>	<b>3,193</b>	<b>32,633</b>	<b>36,723</b>	<b>(11)</b>	<b>35,788</b>
<b>Total US corn export sales</b>	<b>7,374</b>	<b>46,733</b>	<b>50,499</b>	<b>(7)</b>	<b>50,460</b>
% of Projected	15%	98%	100%		
Change from Last Week	473	429	614		
<b>Top 5 importers' share of U.S. corn export sales</b>	<b>43%</b>	<b>70%</b>	<b>73%</b>		
<b>USDA forecast, July 2011</b>	<b>48,260</b>	<b>47,630</b>	<b>50,460</b>	<b>(6)</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol July 2011</b>	<b>130,810</b>	<b>128,270</b>	<b>116,027</b>	<b>11</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.

Table 14

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

Week Ending 07/14/2011	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2009/10
	2011/12 Next MY	2010/11 Current MY	2009/10 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	0	26,014	22,737	14	22,454
Mexico	131	3,111	3,201	(3)	3,276
Japan	123	2,233	2,416	(8)	2,347
EU-25	60	2,599	2,698	(4)	2,647
Taiwan	0	1,399	1,565	(11)	1,556
<b>Top 5 importers</b>	<b>314</b>	<b>35,355</b>	<b>32,616</b>	<b>8</b>	<b>32,280</b>
<b>Total US soybean export sales</b>	<b>8,460</b>	<b>42,056</b>	<b>40,327</b>	<b>4</b>	<b>40,850</b>
% of Projected	21%	102%	99%		
Change from last week	189	257	112		
<b>Top 5 importers' share of U.S. soybean export sales</b>	<b>4%</b>	<b>84%</b>	<b>81%</b>		
<b>USDA forecast, July 2011</b>	<b>40,690</b>	<b>41,370</b>	<b>40,850</b>	<b>1</b>	
<b>Soybean Use for Biodiesel USDA forecast, July 2011</b>	<b>8,393</b>	<b>5,515</b>	<b>4,031</b>	<b>37</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2008/09 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.

Table 15

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

Week Ending 07/14/2011	Total Commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 2010/11
	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -			- 1,000 mt -
Nigeria	1,071	1,058	1	3,233
Japan	1,281	774	66	3,148
Mexico	1,056	951	11	2,601
Philippines	1,061	843	26	1,518
Korea	385	489	(21)	1,111
Peru	365	351	4	923
Taiwan	243	150	62	913
Colombia	266	264	1	783
Indonesia	319	141	127	781
Yemen	170	0		659
<b>Top 10 importers</b>	<b>6,216</b>	<b>5,018</b>	<b>24</b>	<b>15,670</b>
<b>Total US wheat export sales</b>	<b>9,588</b>	<b>7,477</b>	<b>28</b>	<b>33,439</b>
% of Projected	31%	21%		
Change from last week	344	382		
<b>Top 10 importers' share of U.S. wheat export sales</b>	<b>65%</b>	<b>67%</b>		
<b>USDA forecast, July 2011</b>	<b>31,300</b>	<b>35,000</b>	<b>(11)</b>	

(n) indicates negative number.

<sup>1</sup>Modified from the FAS 2010/11 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 07/21/11	Previous Week <sup>1</sup>	Current Week as % of Previous	2011 YTD <sup>1</sup>	2010 YTD <sup>1</sup>	2011 YTD as % of 2010 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2010
							2010	3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	314	165	191	8,253	5,896	140	149	190	11,062
Corn	235	377	62	5,733	5,815	99	89	95	9,950
Soybeans	0	10	0	3,335	4,582	73	45	25	10,191
<b>Total</b>	<b>550</b>	<b>552</b>	<b>100</b>	<b>17,321</b>	<b>16,293</b>	<b>106</b>	<b>105</b>	<b>109</b>	<b>31,203</b>
<b>Mississippi Gulf</b>									
Wheat	150	69	218	3,174	2,183	145	168	105	4,199
Corn	600	375	160	14,806	16,838	88	83	89	29,794
Soybeans	117	73	160	9,949	9,207	108	69	56	22,519
<b>Total</b>	<b>867</b>	<b>517</b>	<b>168</b>	<b>27,930</b>	<b>28,227</b>	<b>99</b>	<b>89</b>	<b>86</b>	<b>56,512</b>
<b>Texas Gulf</b>									
Wheat	128	225	57	7,804	4,382	178	89	90	9,339
Corn	2	0	n/a	782	1,012	77	77	41	1,859
Soybeans	0	0	n/a	763	667	114	0	0	1,916
<b>Total</b>	<b>130</b>	<b>225</b>	<b>58</b>	<b>9,349</b>	<b>6,061</b>	<b>154</b>	<b>88</b>	<b>82</b>	<b>13,115</b>
<b>Great Lakes</b>									
Wheat	0	46	0	638	302	211	81	206	1,897
Corn	0	8	0	45	42	105	0	73	119
Soybeans	0	0	n/a	22	0	n/a	0	n/a	655
<b>Total</b>	<b>0</b>	<b>53</b>	<b>0</b>	<b>705</b>	<b>345</b>	<b>205</b>	<b>92</b>	<b>146</b>	<b>2,672</b>
<b>Atlantic</b>									
Wheat	2	6	36	574	193	298	50	18	343
Corn	4	8	48	183	235	78	31	40	469
Soybeans	2	4	45	446	701	64	207	211	1,417
<b>Total</b>	<b>8</b>	<b>19</b>	<b>43</b>	<b>1,203</b>	<b>1,129</b>	<b>107</b>	<b>57</b>	<b>36</b>	<b>2,229</b>
<b>U.S. total from ports<sup>2</sup></b>									
Wheat	595	511	116	20,443	12,956	158	123	121	26,839
Corn	841	768	109	21,548	23,942	90	84	88	42,192
Soybeans	119	88	135	14,516	15,157	96	63	45	36,699
<b>Total</b>	<b>1,555</b>	<b>1,367</b>	<b>114</b>	<b>56,507</b>	<b>52,055</b>	<b>109</b>	<b>94</b>	<b>92</b>	<b>105,730</b>

<sup>1</sup> Data includes revisions from prior weeks; 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

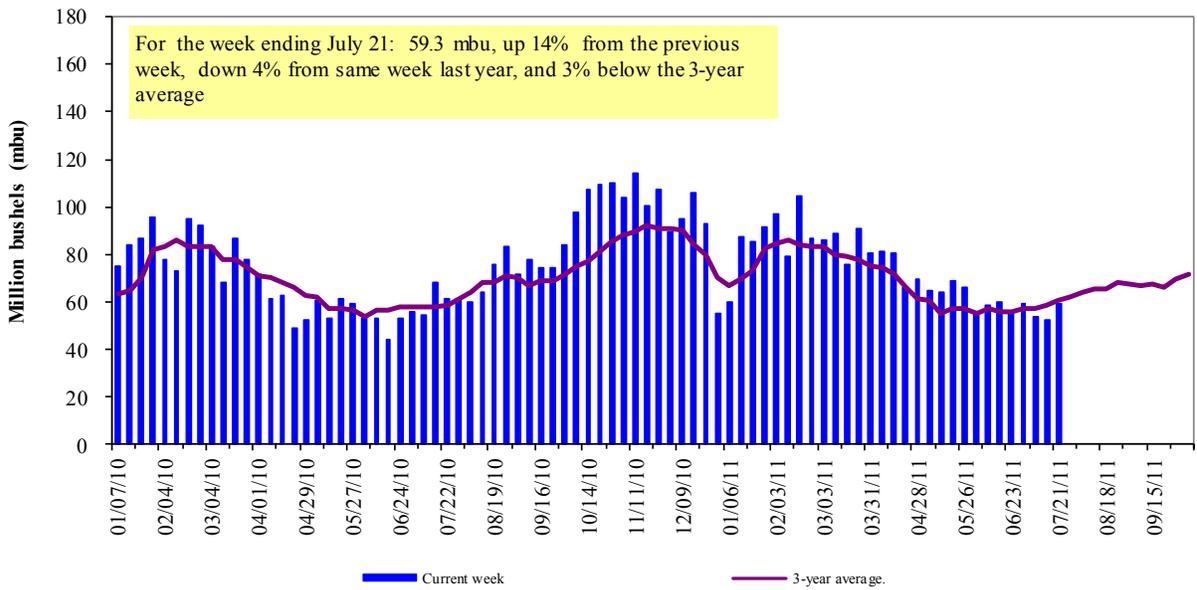
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The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 61 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2010.

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Figure 14

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

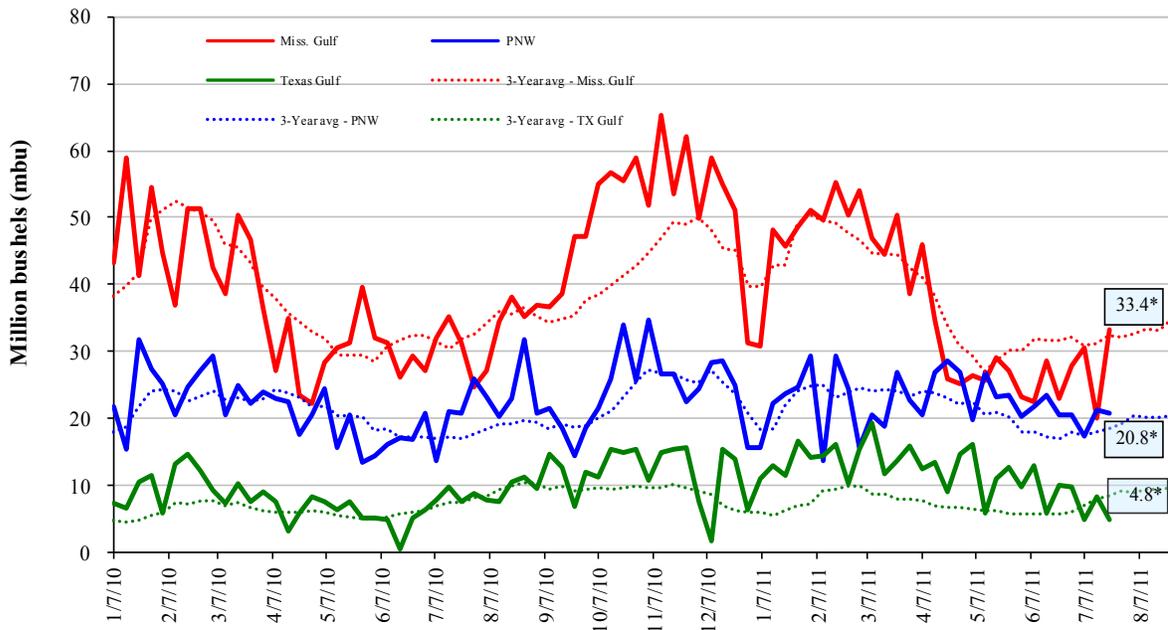


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

**U.S. Grain Inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



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

July 21 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 67	down 42	up 35	down 2
Last year (same week)	up 7	down 37	down 2	down 0.5
3-yr avg. (4-wk mov. avg.)	up 3.2	down 44	down 7	down 7.4

# Ocean Transportation

Table 17

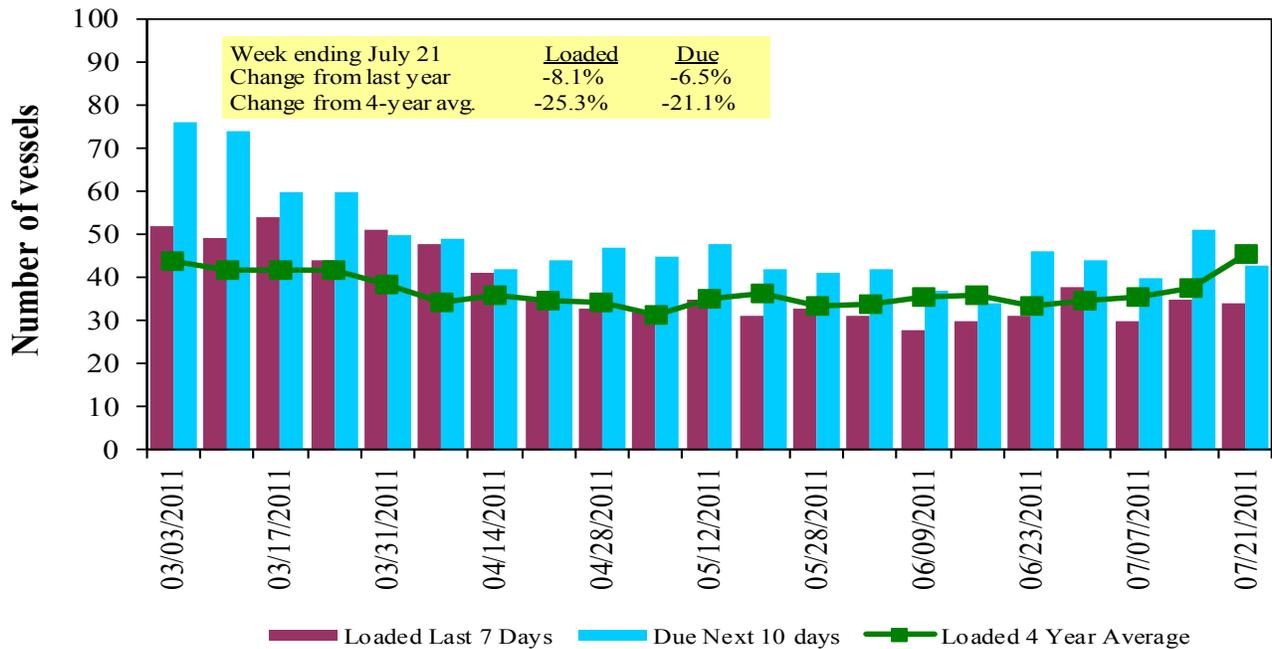
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
7/21/2011	17	34	43	9	8
7/14/2011	16	35	51	10	12
2010 range	(15..69)	(30..57)	(33..84)	(4..24)	(2..20)
2010 avg.	41	42	58	12	11

Source: Transportation & Marketing Programs/AMS/USDA

**Figure 16**

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

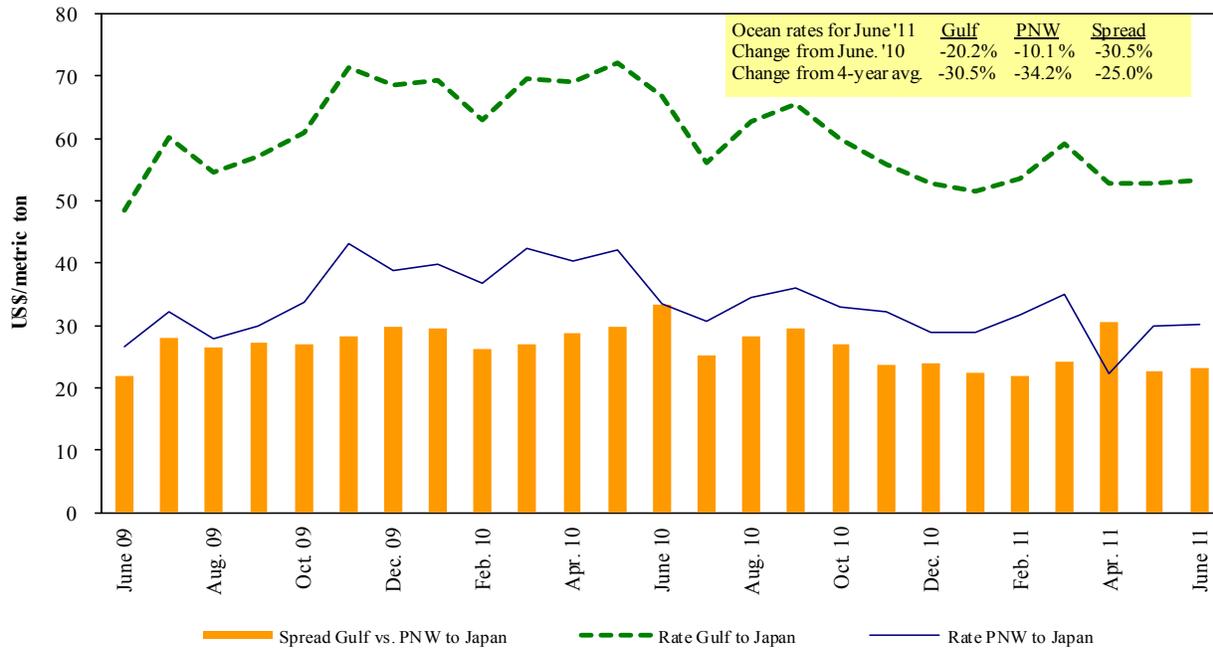


Source: Transportation & Marketing Programs/AMS/USDA

<sup>1</sup>U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

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



Source: O'Neil Commodity Consulting

Table 18

**Ocean Freight Rates For Selected Shipments, Week Ending 07/23/2011**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	May 1/10	55,000	56.00
U.S. Gulf	China	Heavy Grain	Mar 20/29	52,000	52.00
U.S. Gulf	China	Heavy Grain	Mar 8/15	55,000	53.60
U.S. Gulf	Egypt	Grain	May 1/10	60,000	28.50
U.S. Gulf	Japan	Heavy Grain	June 1/12	54,000	52.50
U.S. Gulf	Isreal	Wheat	May 20/30	50,000	36.00
U.S. Gulf	Nigeria	Wheat	Apr 17/23	25,000	46.50
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Mar 31/Apr 9	17,260	129.95
Brazil	China	Heavy Grain	May 18/27	60,000	49.50
Brazil	China	Heavy Grain	April 5/15	60,000	51.00
Brazil	Turkey	Heavy Grain	May 20/30	50,000	32.00
River Plate	Algeria	Corn	July 15/25	25,000	43.50
River Plate	Algeria	Corn	July 1/10	25,000	42.90
River Plate	Algeria	Corn	June 15/25	25,000	42.75
River Plate	Morocco	Heavy Grain	Apr 25/28	2,500	44.50
River Plate	Spain	Maize	May 16/18	25,000	44.00
River Plate	Spain	Corn	Apr 24/25	2,500	46.00
South Africa	Taiwan	Corn	Aug 5/15	55,000	31.00
Ukraine	Spain Med	Corn	May 20/24	25,000	18.00

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

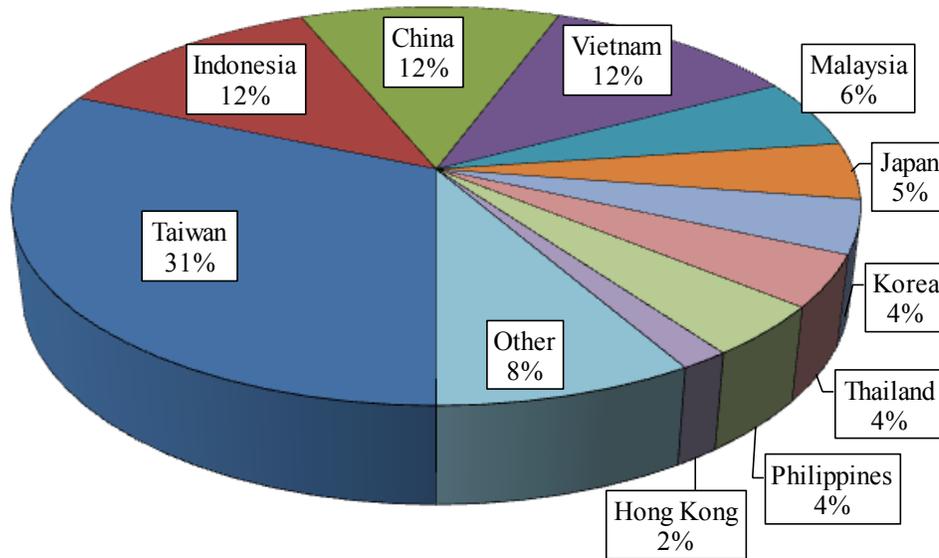
<sup>1</sup>75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Source: Maritime Research Inc. (www.maritime-research.com)

In 2010, containers were used to transport 5 percent of total U.S. waterborne grain exports, and 7 percent of U.S. grain exports to Asia. Asia is the top destination for U.S. containerized grain exports—94 percent in 2010.

Figure 18

**Top 10 Destination Markets for U.S. Containerized Grain Exports, April 2011**

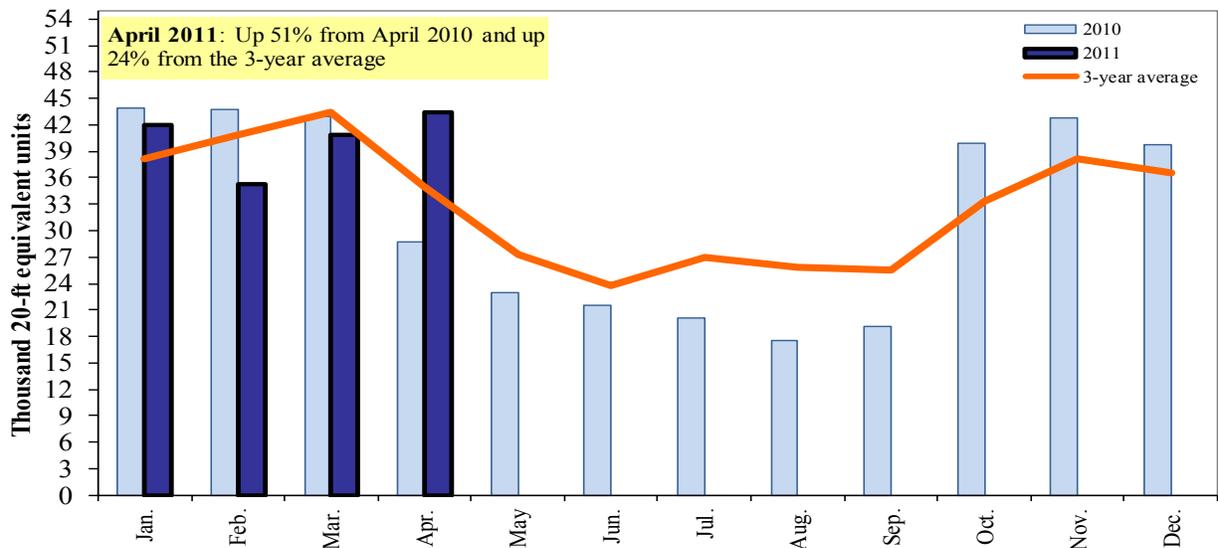


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements (recently added codes are highlighted in bold type): 100190, 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 (recently added codes are highlighted in bold type): 100190, 100200, 100300, 100400, 100590, 100700, 110100, 230310, 110220, 110290, 120100, 230210, 230990, **230330**, and **120810**.

# Contacts and Links

## Coordinators

Surajudeen (Deen) Olowolayemo [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov) (202) 720 - 0119  
Pierre Bahizi [pierre.bahizi@ams.usda.gov](mailto:pierre.bahizi@ams.usda.gov) (202) 690 - 0992

## Weekly Highlight Editors

Marina Denicoff [marina.denicoff@ams.usda.gov](mailto:marina.denicoff@ams.usda.gov) (202) 690 - 3244  
Surajudeen (Deen) Olowolayemo [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov) (202) 720 - 0119  
April Taylor [april.taylor@ams.usda.gov](mailto:april.taylor@ams.usda.gov) (202) 295 - 7374

## Grain Transportation Indicators

Surajudeen (Deen) Olowolayemo [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov) (202) 720 - 0119

## Rail Transportation

Marvin Prater [marvin.prater@ams.usda.gov](mailto:marvin.prater@ams.usda.gov) (202) 720 - 0299  
Johnny Hill [johnny.hill@ams.usda.gov](mailto:johnny.hill@ams.usda.gov) (202) 690 - 3295  
Adam Sparger [adam.sparger@ams.usda.gov](mailto:adam.sparger@ams.usda.gov) (202) 205 - 8701  
Christie McKinney [christie.mckinney@ams.usda.gov](mailto:christie.mckinney@ams.usda.gov)

## Barge Transportation

Nicholas Marathon [nick.marathon@ams.usda.gov](mailto:nick.marathon@ams.usda.gov) (202) 690 - 4430  
April Taylor [april.taylor@ams.usda.gov](mailto:april.taylor@ams.usda.gov) (202) 295 - 7374

## Truck Transportation

April Taylor [april.taylor@ams.usda.gov](mailto:april.taylor@ams.usda.gov) (202) 295 - 7374

## Grain Exports

Johnny Hill [johnny.hill@ams.usda.gov](mailto:johnny.hill@ams.usda.gov) (202) 690 - 3295  
Marina Denicoff [marina.denicoff@ams.usda.gov](mailto:marina.denicoff@ams.usda.gov) (202) 690 - 3244  
Christie McKinney [christie.mckinney@ams.usda.gov](mailto:christie.mckinney@ams.usda.gov)

## Ocean Transportation

Surajudeen (Deen) Olowolayemo [surajudeen.olowolayemo@ams.usda.gov](mailto:surajudeen.olowolayemo@ams.usda.gov) (202) 720 - 0119  
(Freight rates and vessels)  
April Taylor [april.taylor@ams.usda.gov](mailto:april.taylor@ams.usda.gov) (202) 295 - 7374  
(Container movements)

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