



United States
Department of
Agriculture

Agricultural
Marketing
Service

August 16, 2012

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The next
release is
August 23, 2012



Grain Transportation Report

A weekly publication of the
Transportation and Marketing Programs/Transportation Services Division
www.ams.usda.gov/GTR

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WEEKLY HIGHLIGHTS

STB Proposes to Modify Rules Governing Rate Regulation...

On July 25, the Surface Transportation Board (STB) proposed removing the limitation on relief for rate appeals brought under the Simplified Stand-Alone Cost procedure and doubling the relief amount available to \$2 million for rate appeals brought under the 3-Benchmark procedure. In addition, STB proposed changing the interest rate that railroads must pay on reparations if they are found to have charged unreasonable rates, from the T-bill rate to the higher U.S. Prime rate. A notice of intent to participate should be filed by August 24 and comments submitted by October 23.

... Begins Proceeding on Revised Competitive Switching Rules

On July 25, STB began a proceeding to consider granting access to a competing railroad if there is a working interchange within a reasonable distance. The Board is seeking empirical information about the impact of the proposal on railroads and shippers, if it were to be adopted. Opening comments are due by November 23.

President Obama Announces Renovation Projects at Five Ports

On July 19, President Obama unveiled seven infrastructure projects to take place at five ports on the Atlantic seaboard. The affected ports are Florida's Ports of Miami and Jacksonville, the Port of Savannah in Georgia, the Port of Charleston in South Carolina, and the Port of New York-New Jersey. Most projects will deepen harbor channels; a new intermodal facility is planned at the Port of Jacksonville. The 7 projects are the first of 43 projects identified as having national or regional significance; additional projects are expected in the near future. All seven projects are designed to accommodate the Post-Panamax vessels that will pass through the expanded Panama Canal beginning 2014. While these ports handle small volumes of grain, they may become important if there are long disruptions on the Mississippi River. President Obama also announced a new White House-led task force on ports.

Agricultural Haulers Affected by Drought

In the trucking industry, poor Midwestern crop yields have reduced work for truckers who rely on farmers as customers. However, the drought has temporarily boosted livestock haulers as Midwestern ranchers reduce their herds in anticipation of increased feed costs. On the barge front, the U.S. Army Corps of Engineers reports low water levels on large segments of the Mississippi River System. On August 15, the Mississippi River at Vicksburg, MS, was at .6 gage feet, over 23 feet lower than last year and 10.7 feet lower than the historic normal stage. Products continue to move on the river, but the towing industry is light-loading barges and restricting tow sizes. Reduced cargo loads may lead to the need for more trips. The full effects of the drought will remain unknown until the fall harvest.

Snapshots by Sector

Rail

U.S. railroads originated 17,767 **carloads of grain** during the week ending August 4, down 5 percent from last week, up 11 percent from last year, and 10 percent lower than the 3-year average.

During the week ending August 9, average August non-shuttle **secondary railcar bids/offers per car** were \$29.50 below tariff, \$92 higher than last week and \$45.50 lower than last year. Average shuttle **bids/offers** were \$350 below tariff, \$175 lower than last week and \$131.50 higher than last year.

Ocean

During the week ending July 9, 28 **ocean-going grain vessels** were loaded in the Gulf, down 15 percent from the same period last year. Forty-six vessels are expected to be loaded within the next 10 days, 10 percent more than the same period last year.

During the week ending July 10, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$50 per mt, unchanged from the previous week. The cost of shipping from the Pacific Northwest to Japan was \$27 per mt, down 4 percent from the previous week

Barge

During the week ending August 11, **barge grain movements** totaled 616,698 tons, 13 percent lower than the previous week but 11 percent higher than the same period last year.

During the week ending August 11, 398 grain barges **moved down river**, down 11.4 percent from last week; 556 grain barges were **unloaded in New Orleans**, up 19.6 percent from the previous week.

Fuel

During the week ending August 13, U.S. average **diesel fuel prices** increased 12 cents to \$3.97 per gallon—13 cents higher than the same week last year.

Feature Article/Calendar

Grain Transportation Update

USDA Projects Much Lower Corn and Soybean Supply and Demand in 2012/13

The severe and widespread drought this summer in the United States has destroyed hopes for a record corn and soybean crop. According to the August 10 USDA World Agricultural Supply and Demand Estimates (WASDE) report, total production of the major grains (corn, soybeans, and wheat) in 2012/13 is projected to be 15.7 billion bushels. This is 4.5 billion bushels (bbu) lower than what USDA initially projected in May, and 1.7 bbu (9.6 percent) lower than the previous year (Table 1). With lower supplies and higher prices, corn and soybean demand is projected to be lower for the second year in a row. Corn demand, in particular, is over 1 billion bushels lower than last year. Corn exports are projected to be 250 million bushels lower than last year; feed use is projected to be 450 million bushels lower; and corn for ethanol is projected to be 500 million bushels lower. Domestic and export demand categories for all three grains are, respectively, 8.3 and 8.6 percent lower than last year.

Table 1--Major Grains: Production and Use, August 2012 WASDE, million bushels

	Corn	Soybeans	Wheat	Total	Y/Y
<i>United States 2012/13 (Projected)</i>					
Production	10,779	2,692	2,268	15,739	-9.6%
Exports	1,300	1,110	1,200	3,610	-8.6%
Domestic Use	9,925	1,632	1,243	12,800	-8.3%
Ending Stocks/Use	5.8%	5.4%	28.6%		
<i>2011/12 (Estimated)</i>					
Production	12,358	3,056	1,999	17,413	-3.2%
Exports	1,550	1,350	1,050	3,950	-14.6%
Domestic Use	10,940	1,791	1,223	13,954	-2.3%
Ending Stocks/Use	8.2%	6.1%	27.4%		
<i>2010/11</i>					
Production	12,447	3,329	2,207	17,983	
Exports	1,834	1,501	1,289	4,624	
Domestic Use	11,221	1,779	1,289	14,289	

Transportation demand for moving corn and soybeans may be reduced for all modes of transportation. Demand for moving wheat, on the other hand, may be slightly higher than last year based on the projected higher domestic and export use. Rail and barge are the primary modes of transportation of wheat for export; rail and trucks move most of the domestic wheat. ([Modal Share Analysis](#))

Navigation Conditions Deteriorate; Grain Continues to Move While Rates Remain Below Average

Since late spring, there has been a constant deterioration of waterway conditions on the Mississippi River System, especially on the Lower Mississippi River. Low water levels have forced barge operators to use narrower navigation channels and constantly anticipate the depths of the river. Temporary river closures have become common this year, especially since last year's flooding added additional sediments to the river bottom. The U.S. Army Corps of Engineers is dredging trouble spots, potentially halting traffic. However, in general, traffic has continued to move, albeit at slower speeds and increased costs to barge companies. Barge operators have had to load no more than 9-foot drafts on almost all points of the river system.

The mild winter of 2011/12 allowed first quarter barge movements (as measured at the locking sections of the river system) to have one of their best first quarters in 10 years. Movements slowed in the second quarter and were below average. Third quarter barge movements as of August 11 have been up 3 percent as compared to the 5-year average (see Table 2).

Table 2 - Average Weekly Grain Barge Shipments by Quarter, and Total Annual 2007-2012

Year	Average Weekly Shipments				Annual Total
	1st quarter	2d quarter	3d quarter	4th quarter	
1,000 tons					
2007	543	666	632	806	34,397
2008 (f)	522	491	567	561	27,839
2009	567	763	664	761	35,920
2010	576	692	630	762	34,584
2011 (f)	570	510	508	746	30,355
2012	631	578	619*		
5 yr avg	556	624	600	727	32,619

f) – Flood events during year * - As of August 11, 2012

Source: Weekly Shipments at Mississippi River Locks 27, Arkansas River Lock 1, and Ohio River Locks and Dam 52

A number of grain loading facilities on the Lower Mississippi River are reportedly having difficulties loading grain at shallow docks. Therefore, the Upper Mississippi River may be an important source for export grain if the entire length of the river can remain open. Because of abundant spring rains, Minnesota corn and soybean crops are in better condition than crops in most major producing States.

For the most of the year, grain barge rates for St. Louis, MO, to New Orleans, LA, have been below average. As of August 14, barge rates for the third quarter have been 330 percent of tariff (tariff = \$3.99/ton), 20 percent lower than third quarter averages and 7 percent lower than the third quarter last year (see table 3). Moving barges in low water conditions slows deliveries and requires additional barges to move the same amount of cargo; however, the barge supply has been adequate for the current demand for barge services. In the St. Louis area, barge providers anticipate a 20-percent jump in September rates. However, the general uncertainty surrounding crop conditions and possible reduced export demand could keep rates relatively stable for the remainder of the year.

Table 3 - Average weekly Mississippi River barge rates by quarter, 2007-2012

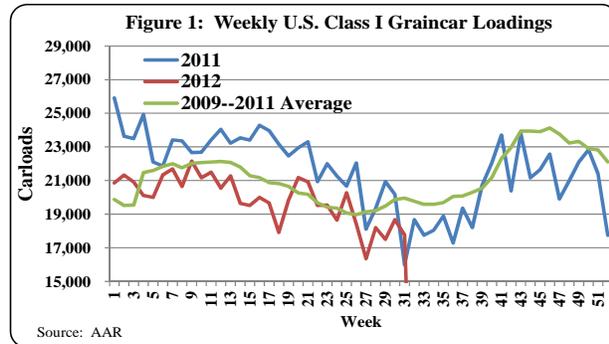
St. Louis to New Orleans - Tariff rate \$3.99 per ton				
	1st quarter	2d quarter	3d quarter	4th quarter
2007	240	218	557	347
2008	357	361	490	550
2009	289	198	271	365
2010	247	219	397	427
2011	418	331	354	350
2012	285	236	330*	
5-yr average	310	265	414	408

* - As of August 14, 2012

Source: USDA-AMS

Graincar Loadings Remain Weak

Graincar loadings are expected to remain weak due to decreased domestic and export demand caused by higher grain prices. Bids/offers in the secondary railcar market are below the 3-year average for the months of August, September, and October. This indicates that shipper demand is expected to be less than the normal supply of graincars. Non-shuttle secondary railcar bids/offers remain between \$0 and \$20 per railcar for the months of September and October. Average shuttle bids/offers for September are \$300 below tariff. Bids/offers for October are \$350 above tariff. During the first 31 weeks of 2012 (through August 4), there were 617,137 grain car loadings for Class I railroads, down 11 percent from the same period in 2011 (693,321) and 3.5 percent less than the 3-year average (639,268) (Figure 1).



Ocean Freight Rates Remain Low

As of August 10, the ocean freight rate for shipping grain from the U.S. Gulf to Japan was \$50 per mt—4 percent below last year and 31 percent less than the 4-year average. The rate from the PNW to Japan was \$28 per mt—2 percent less than last year and 29 percent below the 4-year average. The rate for shipping grain from the U.S. to Europe was \$21.50 per mt, 10 percent less than the previous year and 32 percent below the 4-year average. Ocean freight rates have been kept low by excess vessel supply. Although a greater number of older vessels were scrapped during the 2nd quarter, the new vessel orderbook has been keeping up with the slightly increasing demolition activity. From April to June, 84 new vessels were contracted—about 5.1 million deadweight tonnages (mdwt), and about 6.9 mdwt of older vessels were scrapped. The rapid flow of new deliveries is also increasing the bulk vessel supply. A total of 529 vessels have been delivered this year, amounting to 44.4 mdwt of combined capacity. Another 1,148 vessels—93.5 mdwt, amounting to 25.8 percent of the current fleet—are scheduled for delivery by the end of the year. Given the current state of the global economy and the increasing level of bulk vessel supply, it is reasonable to assume that ocean freight rates for shipping bulk commodities will remain stable, at least in the short term.

Average Diesel Fuel Prices Fall During Second Quarter, but Rise as Third Quarter Progresses

The average diesel price during the second quarter was \$3.93 per gallon—1.6 percent lower than the previous quarter and 2.3 percent lower than the same quarter last year. However, thus far in the third quarter, average diesel prices have increased 28 cents per gallon in response to Middle Eastern tensions, potential supply disruptions during hurricane season, low domestic inventories of distillate fuel (due in part to high global demand for diesel fuel), and expectations of a government stimulus. In its latest Short-Term Energy Outlook, the Energy Information Administration's forecast of the average U.S. refiner acquisition cost of crude oil in 2012 is \$93.91 per barrel, which is \$4.56 per barrel higher than in last month's outlook, but \$10.77 per barrel lower than last year's average price. Rising fuel prices will add upward pressure to the costs of all major modes of transportation.

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Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
08/15/12	265	224	187	203	224	191
08/08/12	258	219	194	169	224	199

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)

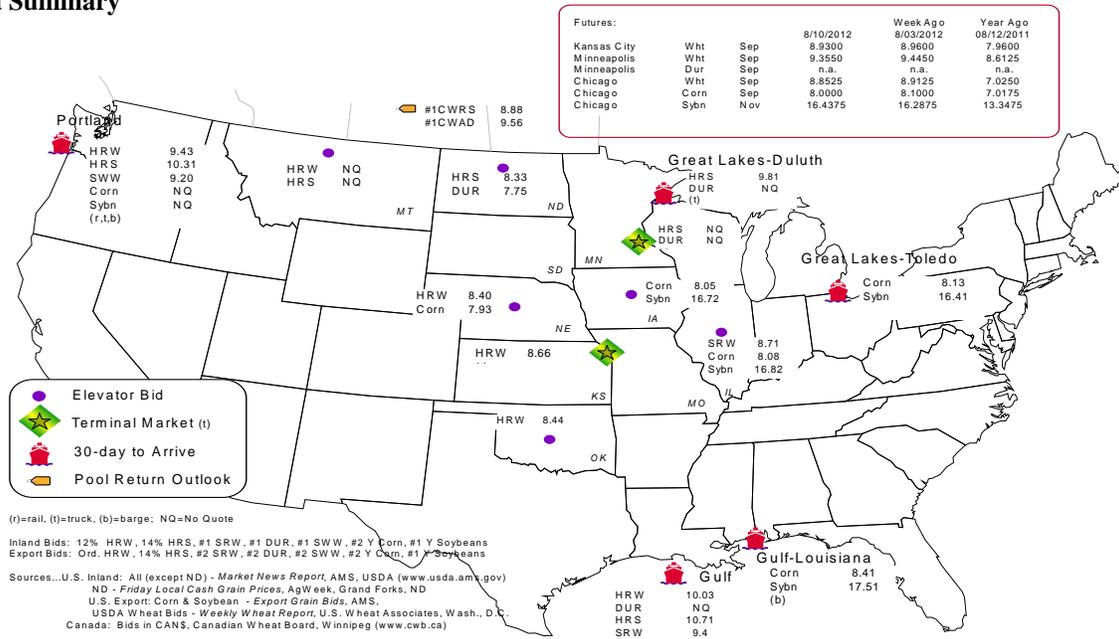
Commodity	Origin--Destination	8/10/2012	8/3/2012
Corn	IL--Gulf	-0.33	-0.49
Corn	NE--Gulf	-0.48	-0.68
Soybean	IA--Gulf	-0.79	-0.91
HRW	KS--Gulf	-1.37	-1.37
HRS	ND--Portland	-1.98	-1.93

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		Cross-Border	Pacific	Atlantic &	Total
	Gulf	Texas Gulf	Mexico	Northwest	East Gulf	
8/08/2012 ^p	791	215	492	4,288	32	5,818
8/01/2012 ^r	393	362	952	2,476	109	4,292
2012 YTD ^r	6,007	23,263	35,548	125,827	11,176	201,821
2011 YTD ^r	21,726	60,504	30,014	120,000	16,619	248,863
2012 YTD as % of 2011 YTD	28	38	118	105	67	81
Last 4 weeks as % of 2011 ²	615	62	77	94	51	92
Last 4 weeks as % of 4-year avg. ²	99	34	108	83	54	75
Total 2011	27,358	77,515	48,782	191,092	24,088	368,835
Total 2010	33,971	83,492	42,794	177,896	32,780	370,933

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2011 and prior 4-year average.

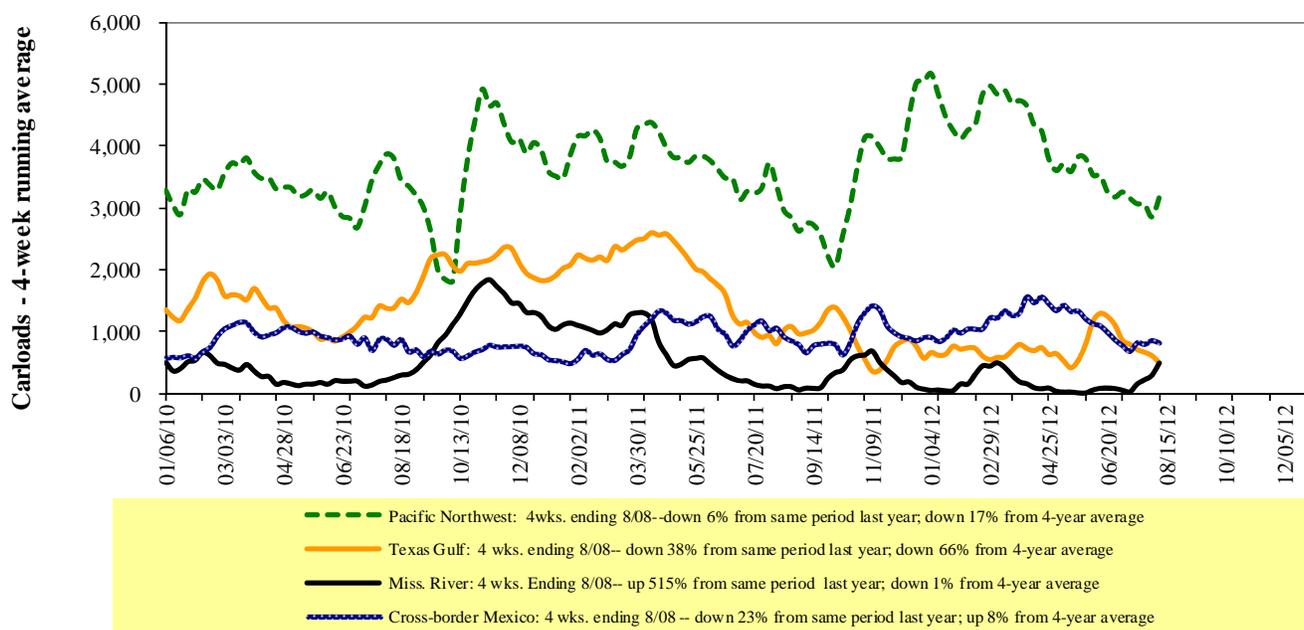
YTD = year-to-date; p = preliminary data; r = revised data; YTD PNW carloads includes revisions back to August 2011 ; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 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

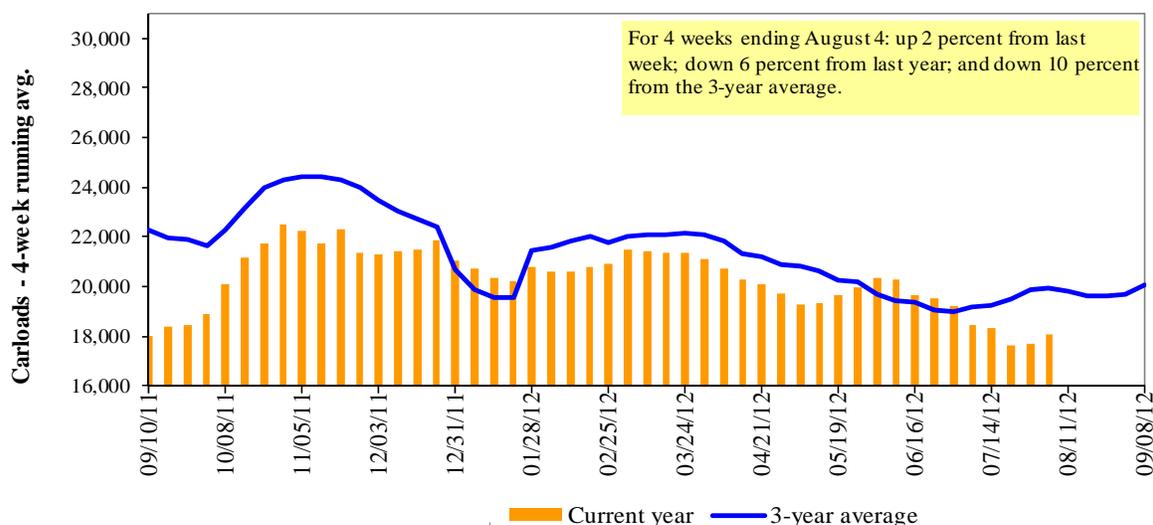
Table 4

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
08/04/12	842	2,938	9,454	717	3,816	17,767	3,834	5,383
This week last year	1,129	2,419	7,167	560	4,714	15,989	3,250	5,916
2012 YTD	56,233	88,041	297,784	15,706	159,373	617,137	119,148	145,745
2011 YTD	60,125	94,078	333,503	20,538	185,077	693,321	120,175	155,645
2012 YTD as % of 2011 YTD	94	94	89	76	86	89	99	94
Last 4 weeks as % of 2011 ¹	76	103	96	96	92	94	118	83
Last 4 weeks as % of 3-yr avg. ¹	68	107	90	94	92	91	112	88
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

¹As 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

Railcar Auction Offerings¹ (\$/car)²

Week ending	Delivery period							
	Aug-12	Aug-11	Sep-12	Sep-11	Oct-12	Oct-11	Nov-12	Nov-11
8/9/2012								
BNSF ³								
COT grain units	0	7	1	no bids	0	139	no offer	7
COT grain single-car ⁵	no bids	3 . . 7	no bids	5 . . 55	0 . . 10	1 . . 25	no offer	0 . . 25
UP ⁴								
GCAS/Region 1	no bids	1	no bids	no bids	1	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	35	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.

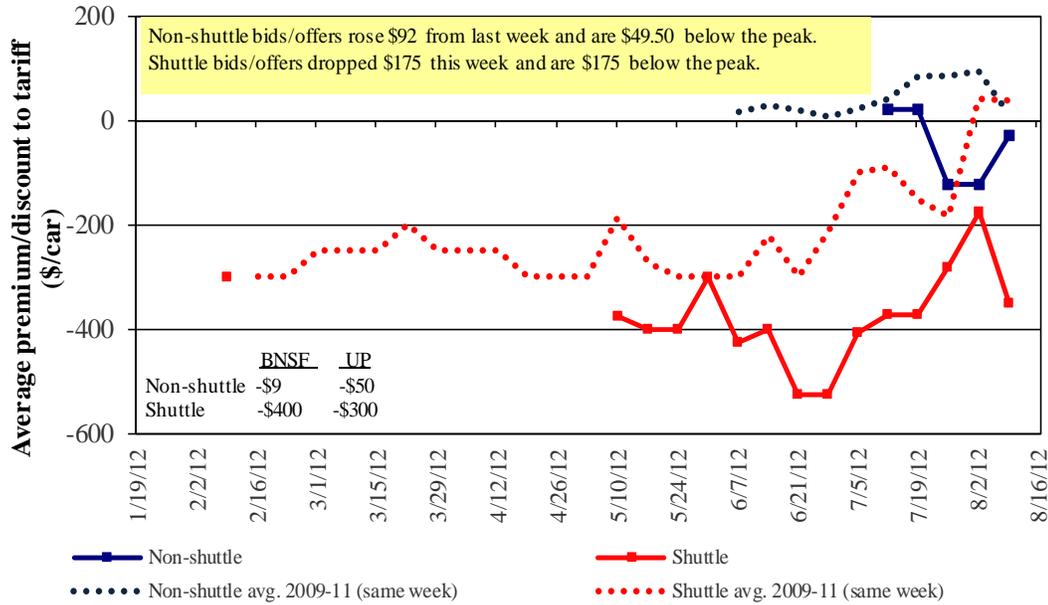
⁵Range is shown because average is not available. Not available = n/a.

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 4

Bids/Offers for Railcars to be Delivered in August 2012, Secondary Market

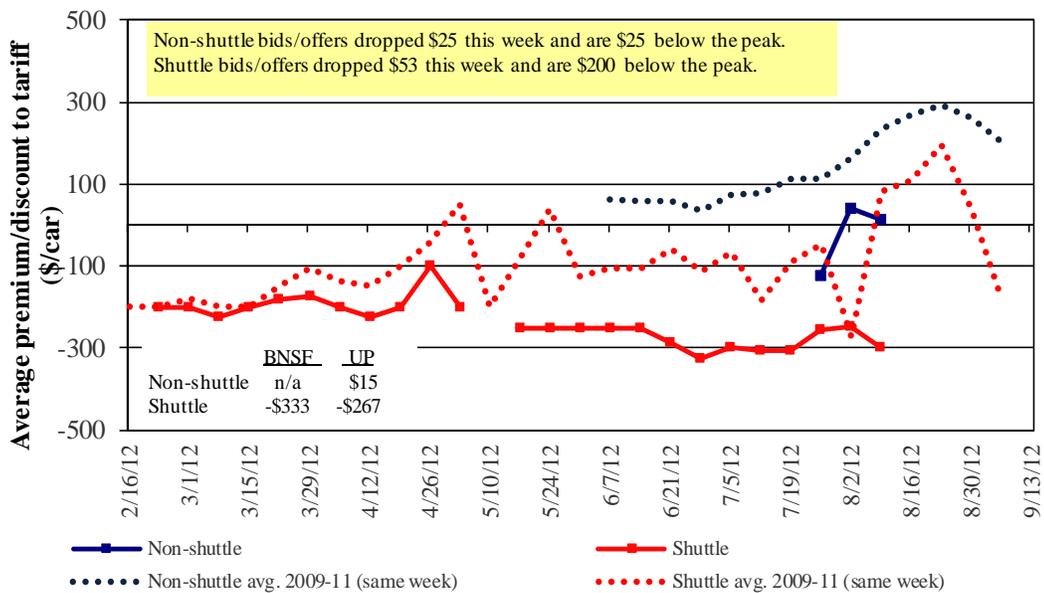


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in September 2012, Secondary Market

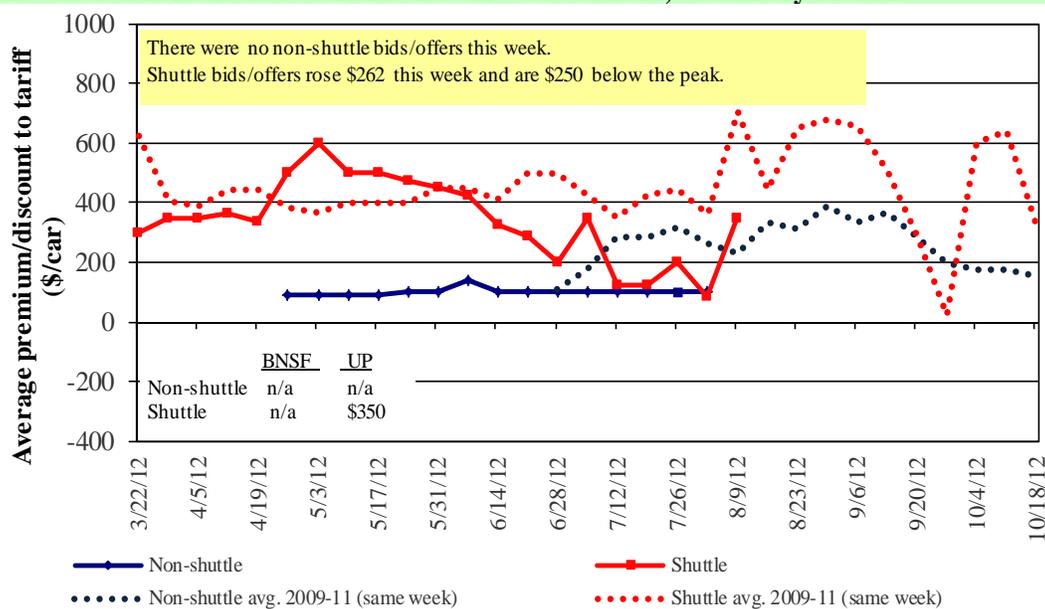


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in October 2012, 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					
	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Jan-13
Non-shuttle						
BNSF-GF	(9)	n/a	n/a	n/a	n/a	n/a
Change from last week	274	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	(28)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(50)	15	n/a	n/a	n/a	n/a
Change from last week	(90)	(25)	n/a	n/a	n/a	n/a
Change from same week 2011	(63)	(35)	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(400)	(333)	n/a	n/a	n/a	n/a
Change from last week	(275)	(39)	n/a	n/a	n/a	n/a
Change from same week 2011	(112)	73	n/a	n/a	n/a	n/a
UP-Pool	(300)	(267)	350	n/a	n/a	n/a
Change from last week	(75)	(67)	62	n/a	n/a	n/a
Change from same week 2011	375	266	50	n/a	n/a	n/a

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

² 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 Shipments¹

Effective date:				Fuel	Tariff plus surcharge per:		Percent
8/1/2012	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$172	\$32.93	\$0.90	4
	Grand Forks, ND	Duluth-Superior, MN	\$3,445	\$95	\$35.16	\$0.96	21
	Wichita, KS	Los Angeles, CA	\$6,026	\$490	\$64.70	\$1.76	4
	Wichita, KS	New Orleans, LA	\$3,645	\$303	\$39.20	\$1.07	3
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$402	\$59.33	\$1.61	2
	Northwest KS	Galveston-Houston, TX	\$3,912	\$332	\$42.14	\$1.15	3
	Amarillo, TX	Los Angeles, CA	\$4,112	\$461	\$45.42	\$1.24	3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,038	\$342	\$33.57	\$0.91	6
	Toledo, OH	Raleigh, NC	\$4,382	\$381	\$47.30	\$1.29	14
	Des Moines, IA	Davenport, IA	\$1,934	\$72	\$19.92	\$0.54	4
	Indianapolis, IN	Atlanta, GA	\$3,821	\$286	\$40.78	\$1.11	17
	Indianapolis, IN	Knoxville, TN	\$3,273	\$183	\$34.32	\$0.93	17
	Des Moines, IA	Little Rock, AR	\$3,074	\$213	\$32.64	\$0.89	4
	Des Moines, IA	Los Angeles, CA	\$4,985	\$620	\$55.66	\$1.51	2
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,134	\$365	\$34.75	\$0.95	-5
	Toledo, OH	Huntsville, AL	\$3,497	\$271	\$37.41	\$1.02	17
	Indianapolis, IN	Raleigh, NC	\$4,453	\$384	\$48.03	\$1.31	14
	Indianapolis, IN	Huntsville, AL	\$3,189	\$183	\$33.49	\$0.91	20
	Champaign-Urbana, IL	New Orleans, LA	\$3,382	\$342	\$36.98	\$1.01	6
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,481	\$282	\$37.36	\$1.02	6
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$219	\$38.26	\$1.04	14
	Chicago, IL	Albany, NY	\$3,645	\$357	\$39.74	\$1.08	3
	Grand Forks, ND	Portland, OR	\$4,963	\$486	\$54.12	\$1.47	4
	Grand Forks, ND	Galveston-Houston, TX	\$5,984	\$507	\$64.45	\$1.75	4
	Northwest KS	Portland, OR	\$4,880	\$544	\$53.86	\$1.47	2
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$592	\$53.55	\$1.46	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$542	\$52.66	\$1.43	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,857	\$342	\$31.77	\$0.86	5
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$316	\$36.01	\$0.98	2
	Des Moines, IA	Amarillo, TX	\$3,430	\$268	\$36.72	\$1.00	2
	Minneapolis, MN	Tacoma, WA	\$4,800	\$588	\$53.50	\$1.46	1
	Council Bluffs, IA	Stockton, CA	\$4,200	\$608	\$47.74	\$1.30	1
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,040	\$542	\$55.44	\$1.51	2
	Minneapolis, MN	Portland, OR	\$5,030	\$592	\$55.83	\$1.52	2
	Fargo, ND	Tacoma, WA	\$4,930	\$482	\$53.75	\$1.46	3
	Council Bluffs, IA	New Orleans, LA	\$3,710	\$394	\$40.76	\$1.11	4
	Toledo, OH	Huntsville, AL	\$2,672	\$271	\$29.22	\$0.80	4
	Grand Island, NE	Portland, OR	\$5,115	\$557	\$56.32	\$1.53	11

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	
				surcharge per car ²	Tariff plus surcharge per: metric ton ³ bushel ³		
Wheat	MT	Chihuahua, CI	\$7,741	\$515	\$84.35	\$2.29	2
	OK	Cuautitlan, EM	\$6,837	\$625	\$76.24	\$2.07	3
	KS	Guadalajara, JA	\$7,444	\$604	\$82.23	\$2.24	0
	TX	Salinas Victoria, NL	\$3,725	\$236	\$40.46	\$1.10	1
Corn	IA	Guadalajara, JA	\$7,699	\$710	\$85.92	\$2.18	1
	SD	Penjamo, GJ	\$7,776	\$673	\$86.33	\$2.19	6
	NE	Queretaro, QA	\$7,097	\$631	\$78.96	\$2.00	2
	SD	Salinas Victoria, NL	\$5,700	\$512	\$63.47	\$1.61	5
	MO	Tlalnepantla, EM	\$6,538	\$613	\$73.07	\$1.85	6
	SD	Torreon, CU	\$6,522	\$564	\$72.40	\$1.84	3
Soybeans	MO	Bojay (Tula), HG	\$7,350	\$599	\$81.22	\$2.21	6
	NE	Guadalajara, JA	\$7,904	\$685	\$87.76	\$2.39	2
	IA	El Castillo, JA ⁵	\$8,255	\$669	\$91.18	\$2.48	5
	KS	Torreon, CU	\$6,421	\$425	\$69.95	\$1.90	3
Sorghum	OK	Cuautitlan, EM	\$5,730	\$511	\$63.77	\$1.62	5
	TX	Guadalajara, JA	\$6,653	\$438	\$72.45	\$1.84	5
	NE	Penjamo, GJ	\$7,426	\$611	\$82.12	\$2.08	4
	KS	Queretaro, QA	\$6,460	\$384	\$69.93	\$1.77	4
	NE	Salinas Victoria, NL	\$5,153	\$450	\$57.24	\$1.45	5
	NE	Torreon, CU	\$6,068	\$502	\$67.13	\$1.70	2

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

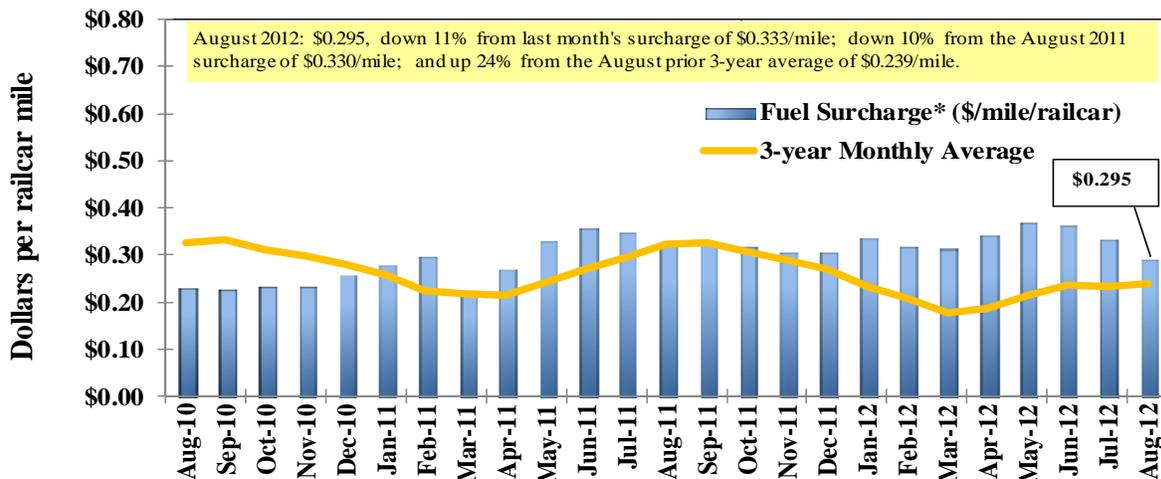
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

⁴Percentage change year over year calculated using tariff rate plus fuel surcharge

⁵Beginning 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 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.

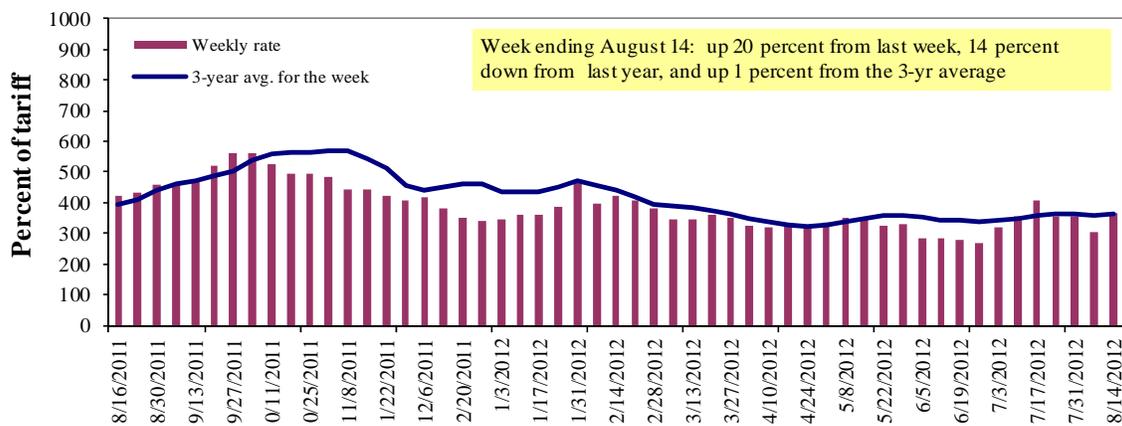
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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^{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

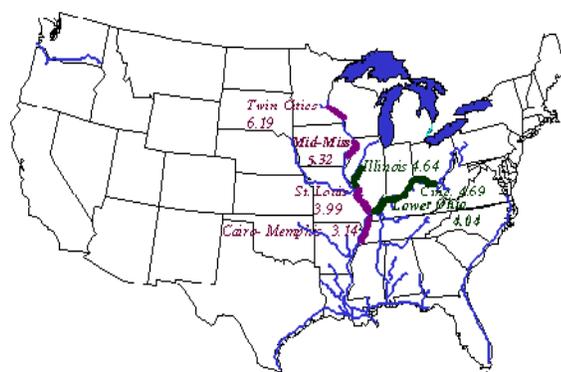
Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid- Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo- Memphis
Rate¹	8/14/2012	400	368	365	348	348	348	387
	8/7/2012	395	322	305	313	328	328	325
\$/ton	8/14/2012	24.76	19.58	16.94	13.89	16.32	14.06	12.15
	8/7/2012	24.45	17.13	14.15	12.49	15.38	13.25	10.21
Current week % change from the same week:								
	Last year	-20	-15	-14	-5	-14	-14	15
	3-year avg. ²	-7	-3	1	20	-1	-1	40
Rate¹	September	475	457	455	458	437	437	425
	November	450	407	412	362	378	378	338

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9
Benchmark tariff rates



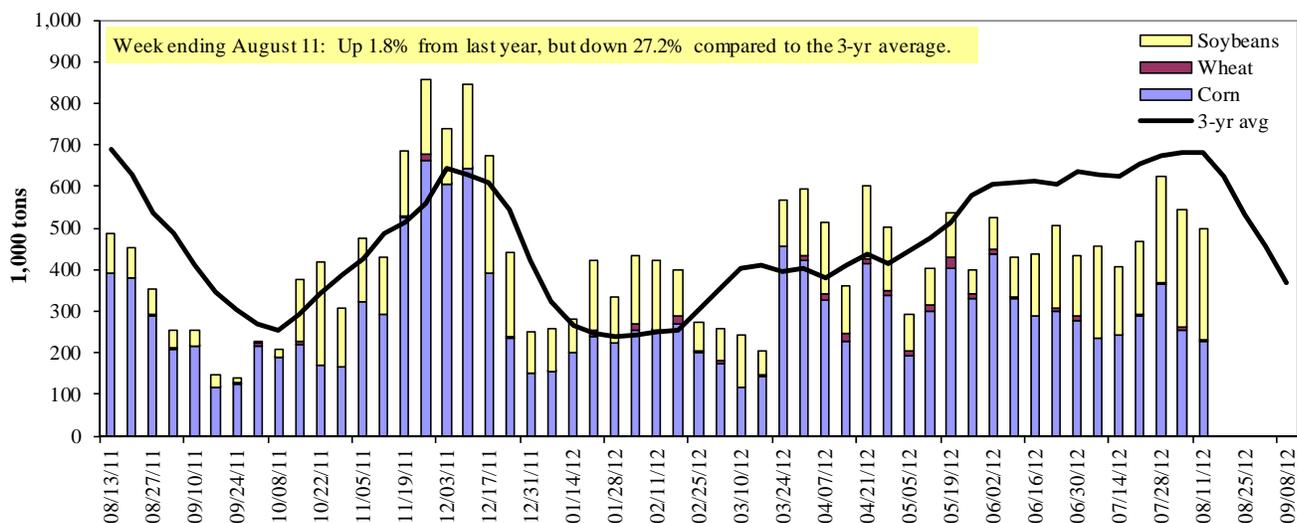
Calculating barge rate per ton:

(Index * 1976 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 River¹ (Locks 27 - Granite City, IL)



¹ The 3-year average is a 4-week moving average.

Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webprts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 8/11/2012	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	193	8	127	0	327
Winfield, MO (L25)	190	2	113	0	305
Alton, IL (L26)	208	2	239	0	448
Granite City, IL (L27)	228	2	267	0	496
Illinois River (L8)	41	0	82	0	123
Ohio River (L52)	11	17	45	0	73
Arkansas River (L1)	15	31	1	0	48
Weekly total - 2012	254	50	313	0	617
Weekly total - 2011	398	47	100	9	555
2012 YTD ¹	11,139	1,294	6,816	189	19,438
2011 YTD	12,262	1,022	4,533	245	18,063
2012 as % of 2011 YTD	91	127	150	77	108
Last 4 weeks as % of 2011 ²	65	52	273	18	99
Total 2011	19,921	1,460	8,553	422	30,356

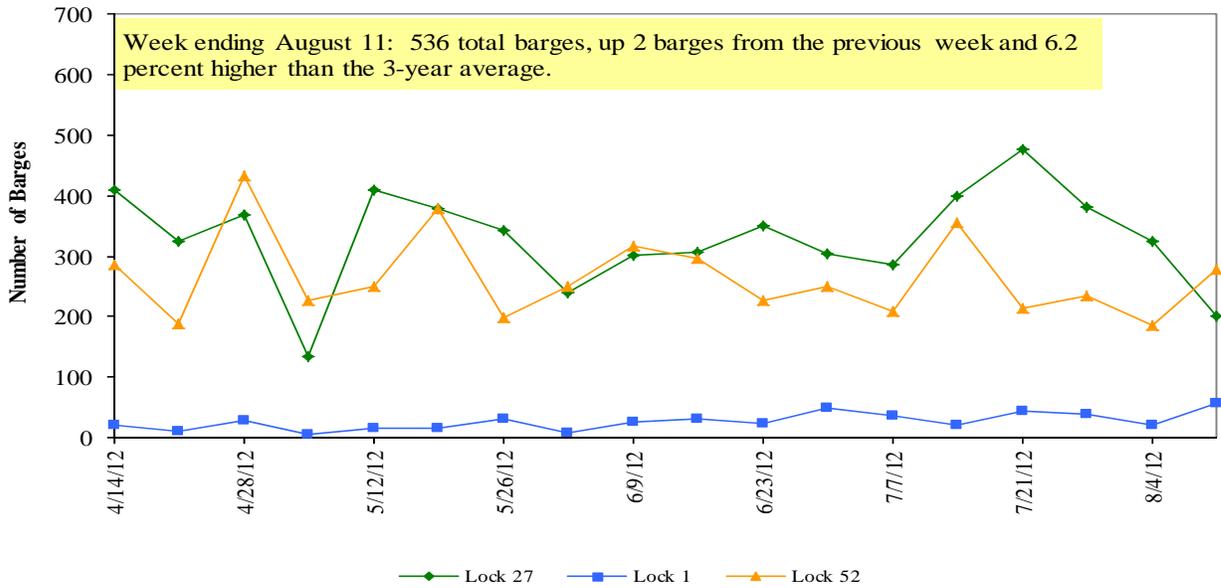
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

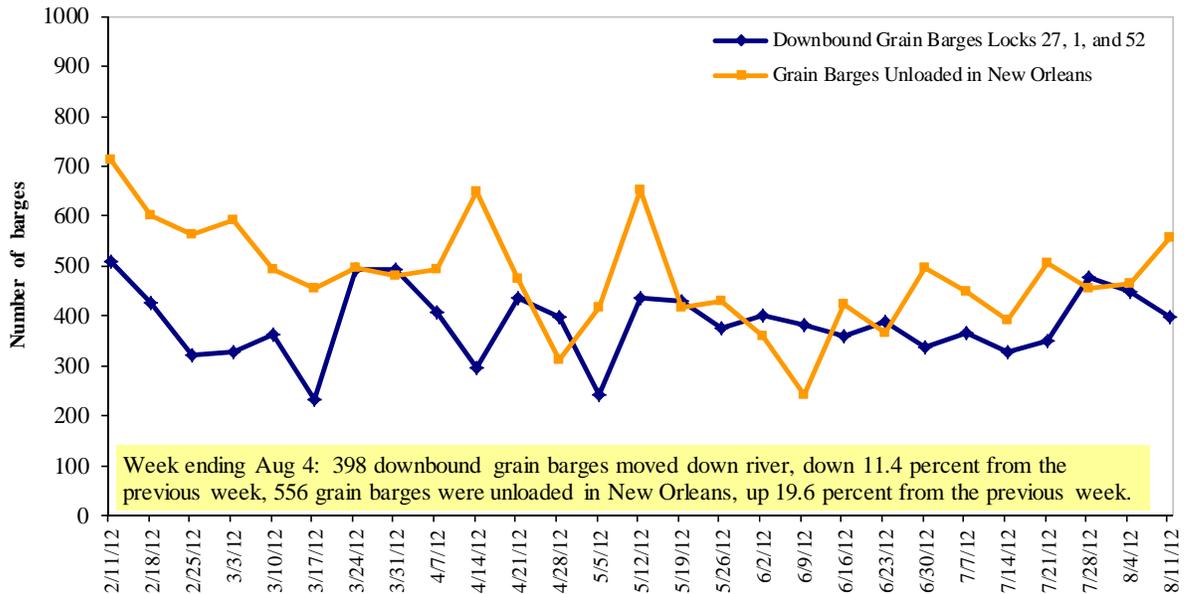
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webprts/default.asp)

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 Prices¹, Week Ending 8/13/2012 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.952	0.083	0.081
	New England	4.011	0.065	0.010
	Central Atlantic	4.004	0.070	0.021
	Lower Atlantic	3.901	0.095	0.090
II	Midwest ²	3.968	0.117	0.153
III	Gulf Coast ³	3.856	0.104	0.050
IV	Rocky Mountain	3.958	0.145	0.132
V	West Coast	4.152	0.193	0.289
	West Coast less California	4.078	0.195	-
	California	4.215	0.192	0.258
Total	U.S.	3.965	0.115	0.130

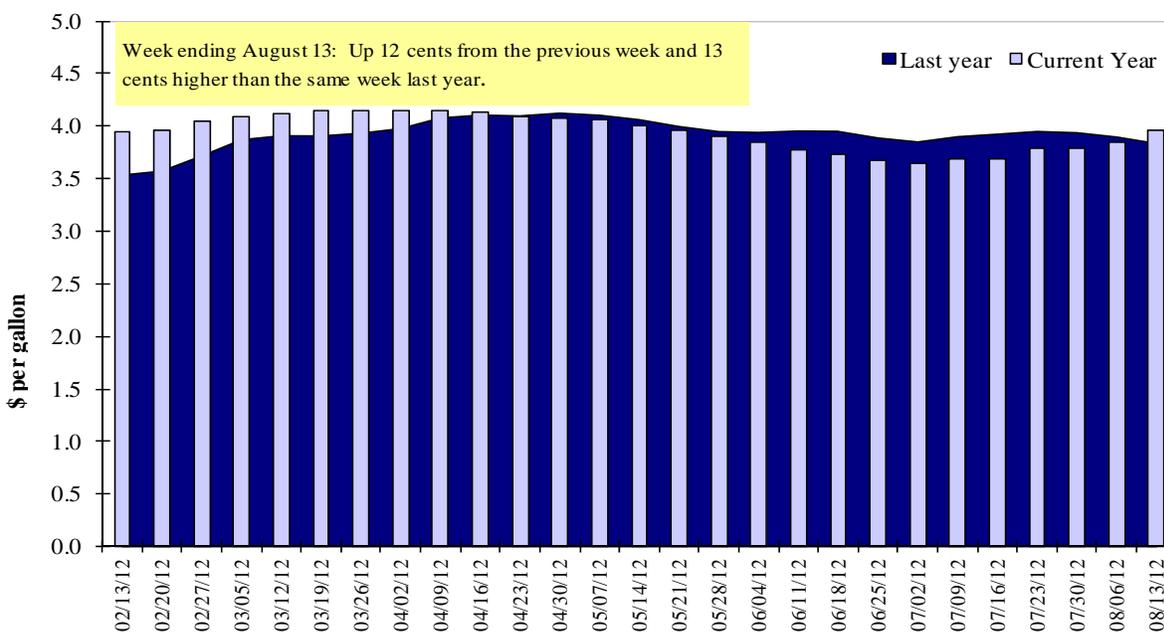
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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						Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances¹									
8/2/2012	1,535	681	1,525	1,267	132	5,141	3,430	3,880	12,451
This week year ago	1,672	905	1,729	1,062	176	5,544	5,728	2,855	14,127
Cumulative exports-marketing year²									
2011/12 YTD	2,129	762	909	566	78	4,443	36,057	34,709	75,209
2010/11 YTD	2,440	707	1,294	839	113	5,393	42,075	39,045	86,513
YTD 2011/12 as % of 2010/11	87	108	70	67	69	82	86	89	87
Last 4 wks as % of same period 2010/11	91	85	83	114	67	91	70	149	94
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306
2009/10 Total	8,458	2,733	5,329	3,897	983	21,400	47,700	39,285	108,385

¹ Current unshipped export sales to date

² Shipped export sales to date; the 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 Importers¹ of U.S. Corn

Week ending 08/02/12	Total Commitments ²			% change current MY from last MY	Exports ³ 2010/11
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	1,343	12,193	14,723	(17)	14,279
Mexico	2,082	9,572	6,978	37	7,019
Korea	306	3,739	6,112	(39)	6,104
China*	800	5,255	804	554	978
Taiwan	0	1,281	2,763	(54)	2,393
Top 5 importers	4,532	32,039	31,379	2	30,772
Total US corn export sales	7,505	39,488	47,803	(17)	46,600
% of Projected	18%	97%	103%		
Change from prior week	928	175	441		
Top 5 importers' share of U.S. corn export sales	60%	81%	66%		
USDA forecast, July 2012	40,640	40,640	46,600	(13)	
Corn Use for Ethanol USDA forecast, Ethanol July 2012	124,460	128,270	127,534	1	

(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.

*China -- New to the Top 5 in the 2011/12 Marketing Year, replacing Egypt.

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 08/02/2012	Total Commitments ²			% change current MY from last MY	Exports ³ 2010/11
	2012/13 Next MY	2011/12 Current MY	2010/11 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	10,082	24,211	25,591	(5)	24,445
Mexico	301	3,177	3,220	(1)	3,215
Japan	129	1,800	2,193	(18)	1,887
EU	232	1,157	2,599	(55)	2,607
Indonesia	82	1,565	1,682	(7)	1,680
Top 5 importers	10,826	31,910	35,285	(10)	33,833
Total US soybean export sales	15,317	38,589	41,899	(8)	40,860
% of Projected	41%	106%	103%		
Change from prior week	195	105	238		
Top 5 importers' share of U.S. soybean export sales	71%	83%	84%		
USDA forecast, July 2012	37,290	36,470	40,860	(11)	

(n) indicates negative number.

¹Based on FAS 2008/09 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 Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 08/02/2012	Total Commitments ²		% change current MY from last MY	Exports ³ 2011/12
	2012/13 Current MY	2011/12 Last MY		
	- 1,000 mt -			- 1,000 mt -
Japan	1,212	1,499	(19)	3,512
Mexico	1,254	1,290	(3)	3,496
Nigeria	895	1,223	(27)	3,248
Philippines	790	1,068	(26)	2,039
Korea	645	410	57	1,983
Egypt	131	184	(29)	950
Taiwan	342	244	40	888
Indonesia	179	377	(53)	830
Venezuela	321	181	77	594
Iraq	209	462	(55)	572
Top 10 importers	5,978	6,936	(14)	18,111
Total US wheat export sales	9,583	10,937	(12)	28,530
% of Projected	29%	38%		
Change from prior week	665	376		
Top 10 importers' share of U.S. wheat export sales	62%	63%		63%
USDA forecast, July 2012	32,660	28,530	14	

(n) indicates negative number.

¹Modified from the FAS 2010/11 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 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 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 08/09/12	Previous Week ¹	Current Week as % of Previous	2012 YTD ¹	2011 YTD ¹	2012 YTD as % of 2011 YTD	Last 4-weeks as % of		Total ¹ 2011
							2011	3-yr. avg.	
Pacific Northwest									
Wheat	379	222	170	8,008	9,116	88	76	106	13,995
Corn	139	125	111	4,851	6,330	77	76	59	9,198
Soybeans	66	82	81	5,415	3,467	156	153	96	7,321
Total	584	429	136	18,275	18,913	97	81	82	30,513
Mississippi Gulf									
Wheat	66	165	40	3,921	3,450	114	99	111	5,031
Corn	294	276	106	12,364	16,488	75	48	45	26,267
Soybeans	278	201	138	10,981	10,165	108	332	218	19,262
Total	637	643	99	27,265	30,103	91	86	79	50,560
Texas Gulf									
Wheat	136	158	86	3,978	8,330	48	90	101	10,837
Corn	30	0	n/a	325	810	40	101	22	1,021
Soybeans	0	0	n/a	5	763	1	n/a	0	926
Total	166	158	105	4,308	9,903	44	90	86	12,784
Interior									
Wheat	24	30	81	761	683	111	43	119	1,110
Corn	96	112	85	4,790	4,546	105	84	72	7,509
Soybeans	81	66	123	2,670	2,380	112	56	158	4,273
Total	200	207	97	8,220	7,609	108	93	97	12,892
Great Lakes									
Wheat	0	0	n/a	182	664	27	71	21	1,038
Corn	8	0	n/a	46	93	49	17	25	178
Soybeans	0	0	n/a	147	22	661	n/a	0	382
Total	8	0	n/a	375	779	48	66	41	1,598
Atlantic									
Wheat	1	3	29	235	613	38	22	16	686
Corn	0	5	0	101	187	54	117	83	295
Soybeans	3	3	117	589	471	125	52	65	1,042
Total	4	10	39	925	1,270	73	43	36	2,022
U.S. total from ports²									
Wheat	605	578	105	17,086	22,855	75	84	100	32,697
Corn	567	518	109	22,477	28,453	79	56	51	44,466
Soybeans	428	352	122	19,806	17,269	115	223	177	33,205
Total	1,600	1,448	111	59,369	68,577	87	83	81	110,369

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

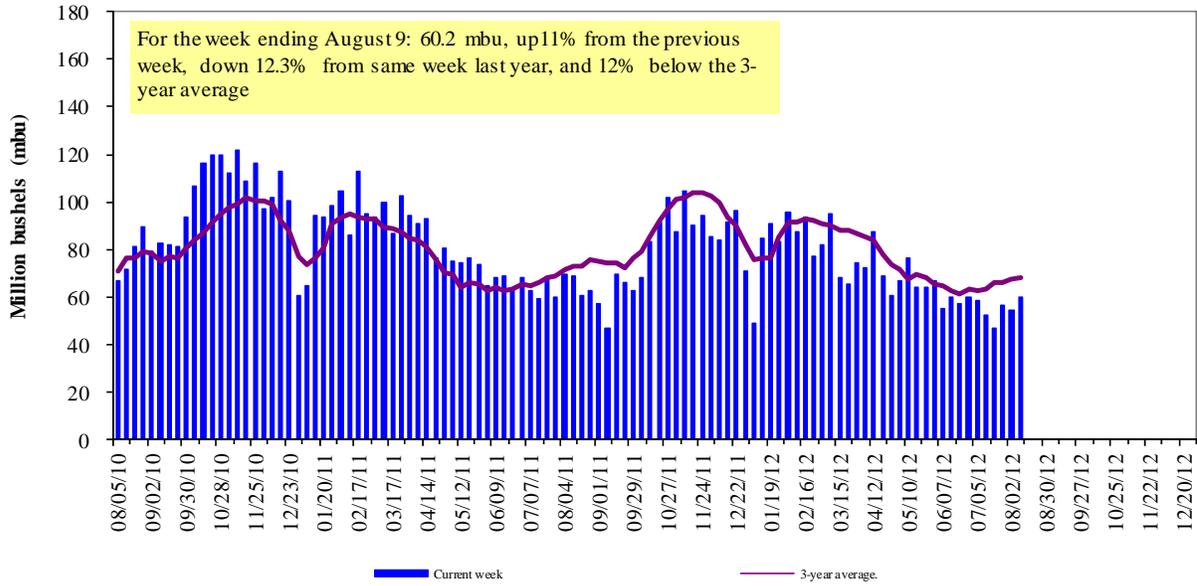
² Total includes only port regions shown above; Interior land-based shipments now included.

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 2011.

Figure 14

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

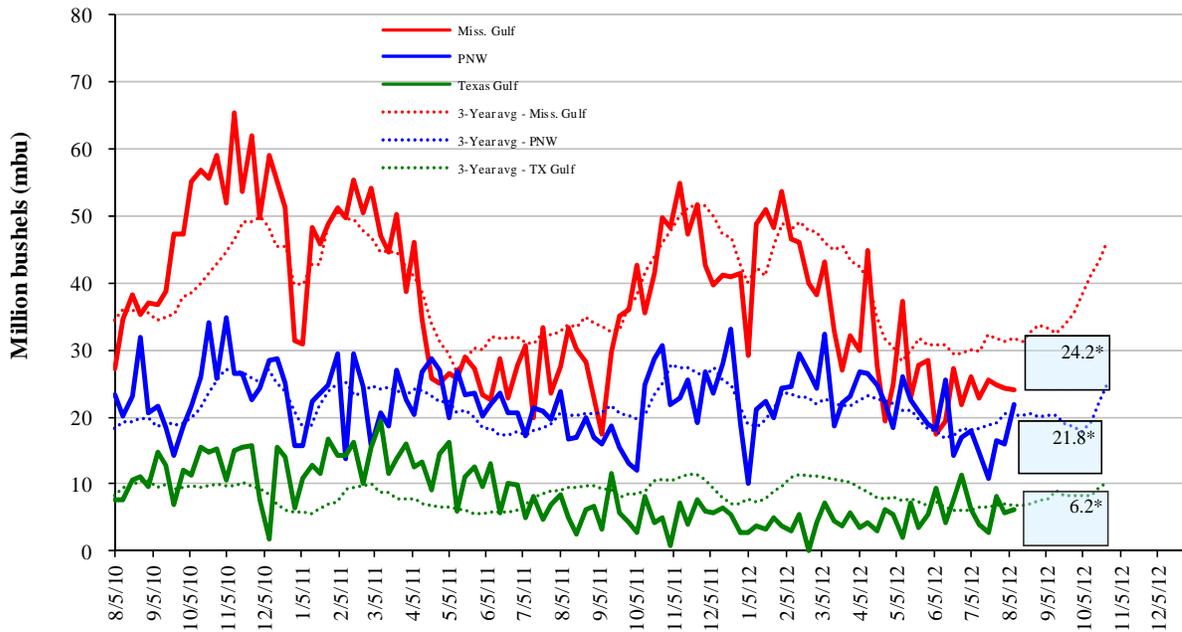


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

August 9 % change from:	MSGulf	TX_Gulf	U.S.Gulf	PNW
Last week	down 1	up 6	up 1	up 36
Last year (same week)	down 27	up 24	down 21	up 31
3-yr avg. (4-wk mov. avg.)	down 24	down 8	down 21	up 15

Ocean Transportation

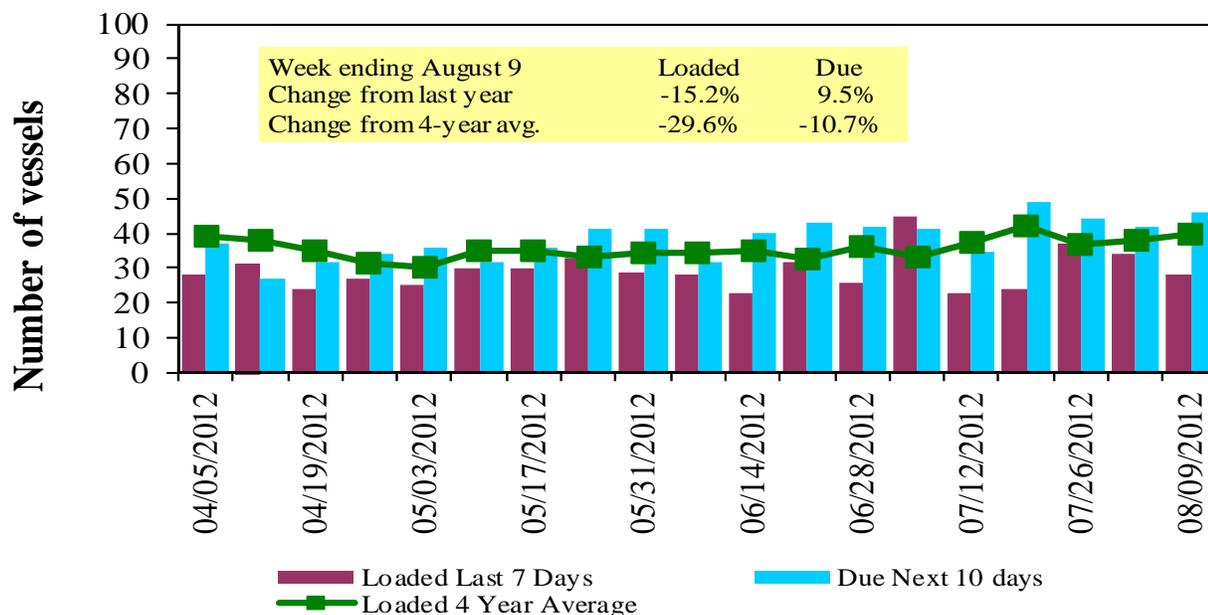
Table 17

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

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded	Due next	In port	In port
		7-days	10-days		
8/9/2012	22	28	46	13	n/a
8/2/2012	22	34	42	11	n/a
2011 range	(14..65)	(28..54)	(34..83)	(5..25)	(1..20)
2011 avg.	31	38	53	15	12

Source: Transportation & Marketing Programs/AMS/USDA

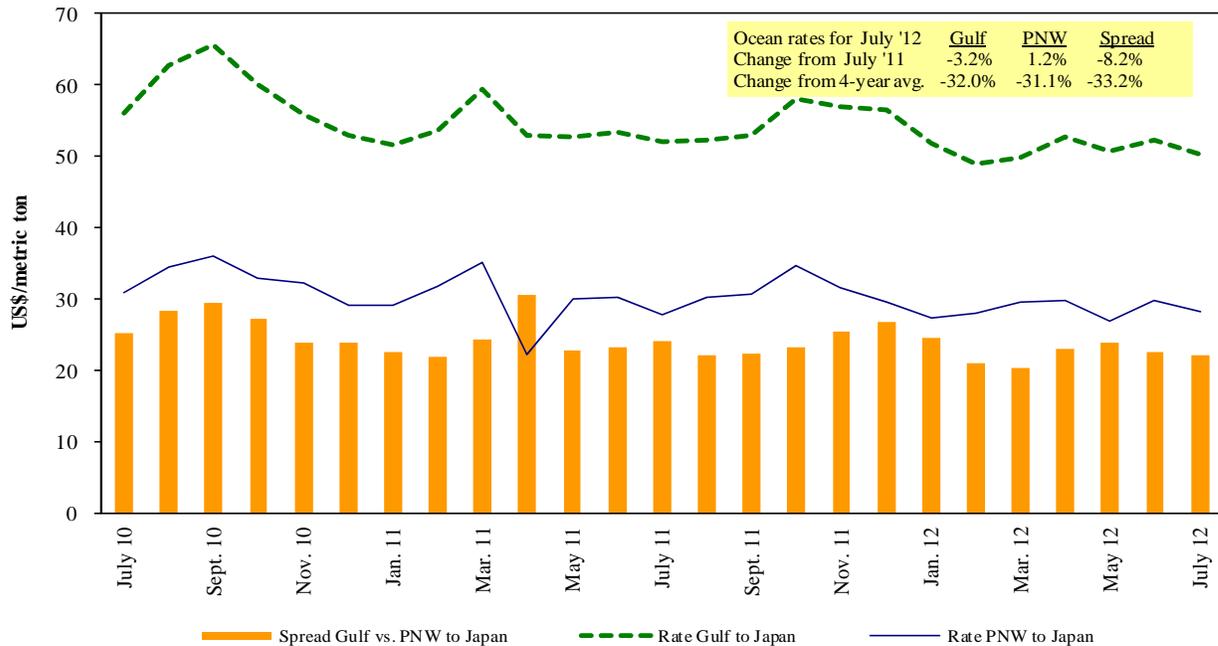
Figure 16
U.S. Gulf^d Vessel Loading Activity



Source: Transportation & Marketing Programs/AMS/USDA

Figure 17

Grain Vessel Rates, U.S. to Japan



Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 08/11/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy Grain	Apr 1/10	58,000	46.00
PNW	Djibouti ¹	Wheat	May 5/15	26,430	118.03
PNW	China	Grain	Jan 10/20	55,000	26.75
St. Lawrence	Nigeria	Wheat	Apr 5/15	25,000	45.00
Argentina	Morocco	Barley	Apr 1/10	25,000	39.75
Australia	China	Grain	Jul 26/Aug 4	65,000	19.45
Brazil	China	Heavy Grain	Aug10/20	60,000	48.50
Brazil	China	Heavy Grain	Jul 25/30	60,000	49.00
Brazil	China	Heavy Grain	May 20/30	60,000	47.75
Brazil	China	Heavy Grain	May 1/30	66,000	40.50
Brazil	China	Heavy Grain	Apr 1/10	60,000	47.75
River Plate	Algeria	Corn	Aug 20/30	25,000	32.50
River Plate	Algeria	Corn	Jul 5/15	25,000	34.00
River Plate	Egypt Med	Corn	Feb 25/ Mar 5	30,000	39.25
Ukraine	Japan	Corn	Apr 6/15	47,000	47.50
Ukraine	Kenya	Grain	Jul 25/28	26,000	49.50

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

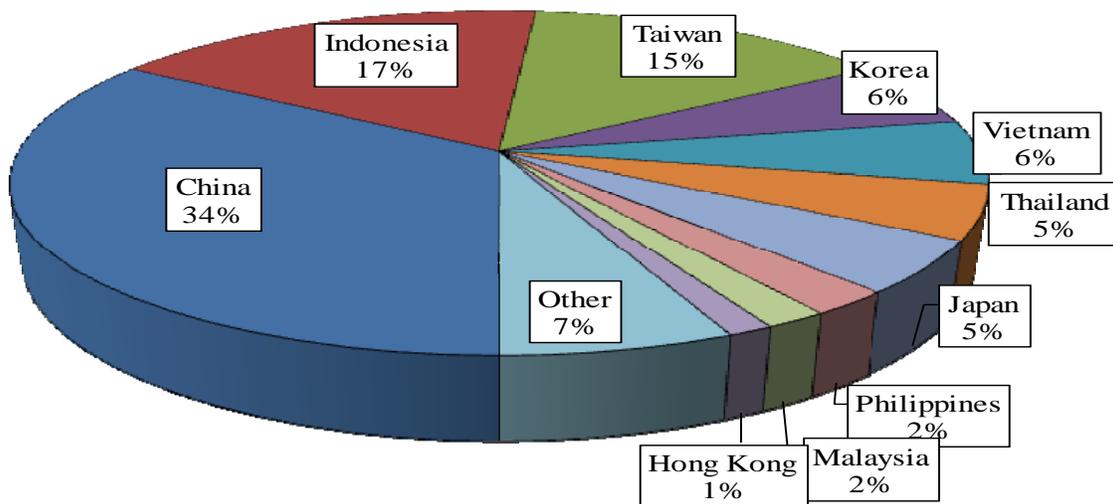
¹75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 2011, containers were used to transport 7 percent of total U.S. waterborne grain exports, up 2 percentage points from 2010. Approximately 11 percent of U.S. waterborne grain exports in 2011 went to Asia, up 4 percentage points from 2010. Asia is the top destination for U.S. containerized grain exports—96 percent in 2011.

Figure 18

Top 10 Destination Markets for U.S. Containerized Grain Exports, May 2012

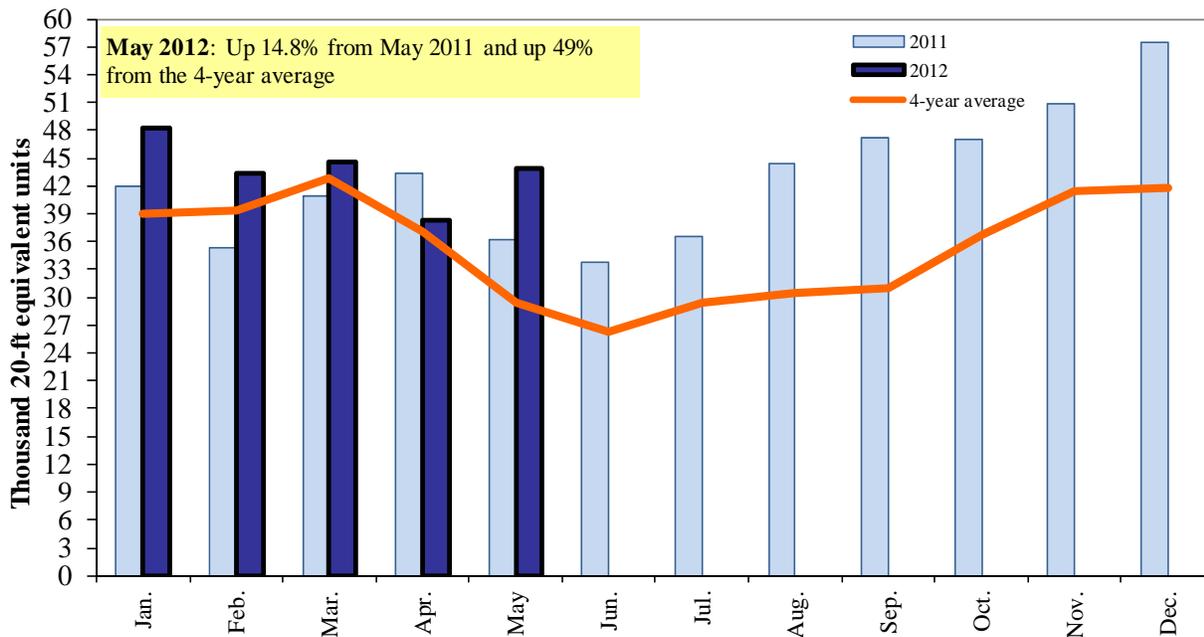


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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.

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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