



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

Navigation Conditions Steady; Low Water on the Missouri River a Concern

With 62 percent of the continental U.S. in moderate or worse drought conditions, there have been significant efforts by the U.S. Army Corps of Engineers (Corps), U.S. Coast Guard, navigation industry, and State and local governments to maintain adequate navigation channels. The Corps reports that the percentage of the U.S. affected by the drought has decreased one percent per week for the last four weeks. The Missouri River remains a concern as below-average precipitation is expected through the fall. Missouri River flows are an important contribution of water for maintaining navigation levels on the Mississippi River between St. Louis, MO, and the mouth of the Ohio River. The Corps controls water levels on the Missouri River by regulating the water discharge at upstream reservoirs. There is considerable controversy over the priorities of Missouri River water between the upstream and downstream States.

Corn Inspections Rebound

For the week ending October 25, **total inspections of corn** (.395 mmt) rebounded, increasing 49 percent from the past week. Corn inspections were up mainly in the Mississippi Gulf (.344 mmt) as shipments increased to Asia and Mexico. Total Mississippi Gulf grain inspections increased 5 percent from the previous week and 5 percent above last year at this time. Soybean inspections were unchanged from the past week but wheat inspections dropped 41 percent. Total inspections of grain (wheat, corn, and soybeans) for export from major U.S. ports reached 2.39 million metric tons (mmt), down 2 percent from the previous week and 12 percent below this time last year. Outstanding export sales of corn and soybeans continued to drop, but wheat sales increased slightly.

Union Pacific Opens Transload Facility

Union Pacific Railroad (UP) opened a transload facility in Yermo, CA, which is 130 miles from the Los Angeles port. The facility will transload unit-train movements of grain and distillers dried grains from hopper cars into containers for export to Asia. Although, the containerized export of grain is still quite small relative to bulk grain exports, there is potential for increased container exports if transload facilities are built near ports. Grain exporters in the rural regions of the Midwest have difficulty securing empty containers because empty containers are typically more easily found in urban areas close to ports and inland distribution centers. The cost of transporting empty containers to rural grain and ethanol biorefineries is often so high that exporting those products in containers is no longer economically competitive. The movement of grain and distillers dried grains in unit trains of hopper cars to transload facilities near a port may be a more cost-effective solution.

Snapshots by Sector

Rail

U.S. railroads originated 20,468 **carloads of grain** during the week ending October 20, down 8 percent from last week, up 0.4 percent from last year, and 14 percent lower than the 3-year average.

During the week ending October 25, average November non-shuttle **secondary railcar bids/offers per car** were \$12 below tariff, down \$12 from last week, and \$16 higher than last year. Average shuttle bids/offers were \$212.50 below tariff, up \$6.50 from last week, and \$194 higher than last year.

Barge

During the week ending October 27, **barge grain movements** totaled 516,650 tons, 32 percent lower than the previous week and 24 percent lower than the same period last year.

During the week ending October 27, 332 grain barges **moved down river**, down 31 percent from last week; 843 grain barges were **unloaded in New Orleans**, up 3.6 percent from the previous week.

Ocean

During the week ending October 25, 39 **ocean-going grain vessels** were loaded in the Gulf, down 7 percent from the same period last year. Fifty-seven vessels are expected to be loaded within the next 10 days, 4 percent more than the same period last year.

During the week ending October 26, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$47.50 per mt, down 3 percent 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.

Fuel

During the week ending October 29, U.S. average **diesel fuel prices** decreased 9 cents to \$4.03 per gallon—14 cents higher than the same week last year.

Feature Article/Calendar

Grain Transportation Update

An early and fast fall harvest combined with a record pace of soybean exports, slow corn export sales, and fairly stable wheat exports has created an interesting mix for transportation demand. Soybeans have dominated barge movements this fall, as export sales reach record levels for this time of year (see GTR table 14). Shipments of wheat for export have also been strong this summer and early fall. Demand for moving corn, however, is much lower than normal. Lower overall grain production and exports reduced this year's level of graincar demand below normal during harvest. Low-water and other events slowed grain barge movements during the third quarter, resulting in higher barge rates. Diesel fuel prices increased in the third quarter, but are starting to fall in the fourth. Ocean rates, however, remain low as the global economic growth remains sluggish.

Corn to Pull Down Total Grain Production and Use

In its October monthly World Agricultural Supply and Demand Estimates (WASDE) report, USDA projected the 2012/13 corn crop to reach 10.7 billion bushels (bbu), down 13 percent from the previous year (see table 1). Soybean production was not as damaged by the severe and widespread drought of 2012, and is projected to reach 2.86 bbu, down 8 percent from the previous year. Wheat production is about unchanged. Although total production is lower than last year, the fall harvest pace has been much faster than normal, creating a surge in demand for trucking. The demand side of the supply/demand table is more significant for transportation interests: USDA projects total exports to be 13 percent lower than last year and domestic use to decrease by 7 percent. The greater variability in export demand creates more uncertainty year over year for grain shippers. Corn exports are expected to decrease significantly from the previous year, while soybean and wheat exports are not as severely affected by lower production.

	Corn	Soybeans	Wheat	Total	Y/Y
United States 2012/13 (Projected)					
Production	10,706	2,860	2,269	15,835	-10.6%
Exports	1,150	1,265	1,150	3,565	-13.1%
Domestic Use	10,000	1,655	1,338	12,993	-7.3%
Ending Stocks/Use	5.6%	4.5%	26.3%		
2011/12 (Estimated)					
Production	12,358	3,094	2,268	17,720	-1.5%
Exports	1,543	1,360	1,200	4,103	-11.3%
Domestic Use	10,983	1,795	1,243	14,021	-0.8%
Ending Stocks/Use	7.9%	5.4%	28.6%		
2010/11					
Production	12,447	3,329	2,207	17,983	
Exports	1,834	1,501	1,289	4,624	
Domestic Use	11,221	1,779	1,128	14,128	
Ending Stocks/Use	8.6%	6.6%	35.7%		

Drought Drives Freight Rates Up, Barge Movements Down

Since late spring, waterway traffic on the Mississippi River System was frequently disrupted by drought-induced low water conditions and other events. Grain barge movements were slowed by narrower navigation channels, light-loading of barges, dredging activities, temporary river closures caused by grounded vessels, and a structural failure at Mississippi River Locks 27 (near St. Louis, MO) that closed the river for several days. The U.S. Army Corps of Engineers continues to dredge trouble spots, and monitor 15 areas on the Ohio, Missouri, and Mississippi Rivers to ensure safe and uninterrupted navigation on the river system. Traffic has continued to move, albeit at slower speeds and increased costs for barge companies.

Average weekly barge shipments, as counted at the locking sections of the river system, were above the 5-year average for the first quarter of this year; however, each successive quarter has been below average (see table 2). Third-quarter movements were 17 percent below average. Corn normally dominates barge movements, but soybeans took on that role during the third quarter this year. This year's third quarter corn movements have dropped from an average of 76 percent of the total to 50 percent. The soybean percentage of barge movements for the third quarter is typically 15 percent of the total; however, this year's third quarter soybeans represented 40 percent.

Table 2 - Average Weekly Grain Barge Shipments by Quarter, and Total Annual 1997-2012

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	499	569*	
5 yr avg	556	624	600	727	32,619

(f) – Flood events during year * - As of October 30, 2012

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

Barge rates increased during the third quarter in response to slower navigation. During the first half of the year, grain barge rates for St. Louis to New Orleans, LA, have been below average. By the third quarter, rates increased to 425 percent of tariff (\$16.96 per ton based upon a \$3.99 tariff index). Fourth quarter rates, however, have been above average as months of light loading, delays, and stoppages have raised the price of obtaining barge services. For the first half of November, there could be continued above-average rates unless there is a significant improvement in water levels.

Table 3-- Average weekly Mississippi River barge rates by quarter, 2007-2012, St. Louis to New Orleans (tariff rate = \$3.99 per ton)

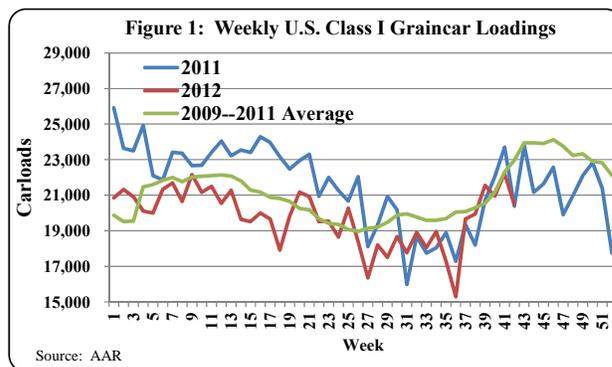
	1st quarter	2d quarter	3d quarter	4th quarter
2007	240	218	557	347
2008	357	361	490	550
2009	289	198	271	365
2010	247	219	397	427
2011	418	331	354	350
2012	285	236	425	568*
5-yr average	310	265	416	408

* - As of Oct 30, 2012

Source: USDA-AMS

Graincar Demand Remains Lower than Average

Lower exports reduced shippers' need to secure graincars, creating extra capacity and reducing bid offers. Bids/offers in the secondary railcar market are below the 3-year average for the months of November and December, indicating lower shipper demand for graincars than in past years. However, demand for railcar service during November and December is slightly stronger than last year after bids were at a four-year low for service during October. Weekly non-shuttle secondary railcar bids/offers have been trading close to tariff for the months of November and December. Average shuttle bids/offers per railcar for November are \$212.50 below tariff, about \$200 higher than last year at this time. Bids/offers for December are \$262.50 below tariff, about \$60 higher than last year. During the third quarter of 2012, there were 238,163 grain car loadings for Class I railroads, down 2.2 percent from the same period in 2011 (243,520) and 7.4 percent less than the 3-year average (257,283) (see figure 1).



Excess Vessel Supply and Weak Global Freight Demand Kept Ocean Freight Low

Third quarter ocean freight rates for shipping bulk commodities, including grains, continued their downward trend due to persistent excess dry bulk vessel supply and weak global demand for shipping bulk commodities. Despite the sluggish bulk market, new vessel deliveries continued to outpace the scrapping of older vessels, resulting in a net addition to the existing fleet (see [GTR, dated 10/25/12](#)). In addition, demand for transportation of bulk commodities such as iron ore, coal, and grain has been hampered by weather, labor and industrial and global economic issues. During the third quarter, ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged \$49.18 per metric ton (mt)—3 percent lower than the previous quarter, 7 percent below last year, and 30 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest (PNW) to Japan was \$26.31 per mt—4 percent lower than previous quarter, 14 percent below last year, and 32 percent lower than the 4-year average. The cost of shipping from the Gulf to Europe averaged \$21.81 per mt—5 percent higher than the previous quarter, 9 percent below last year, and 30 percent lower than the 4-year average. The spread between the Gulf-to-Japan and PNW-to-Japan rates was \$22.87 per mt. The spread is 2 percent above last year, but 3 percent below last quarter and 28 percent less than the 4-year average. Compared to last year, the spread and shares of grain shipments from the Gulf and PNW have been relatively stable (see [GTR, dated 10/18/12](#)). Since the end of the third quarter, ocean rates have remained low. As of October 26, the rate for shipping grain from the Gulf to Japan was \$47.50 per mt, and the rate from the PNW to Japan was \$27 per mt. The Gulf and PNW rates are 18 and 21 percent below this time last year, respectively. Market activities indicate rates are likely to remain low in the near term as the bulk market is still experiencing an excess supply of vessels.

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

The average diesel price during the third quarter was \$3.96 per gallon—0.8 percent higher than the previous quarter and 2.3 percent higher than the same quarter last year. Thus far in the fourth quarter, average diesel prices have already increased 7 cents per gallon to a 4-year high of \$4.15 before falling 12 cents to \$4.03, the price for the week ending October 29. It remains to be seen whether diesel prices will follow their downward trend or continue to fluctuate. The Energy Information Administration's latest Short-Term Energy Outlook attributed the price increases to tight market conditions and increasing crude oil prices. The price decreases are linked to weaker equities, concerns about economic growth, and steady production coupled with weak demand. Falling fuel prices will relieve upward pressure from the costs of all major modes of transportation. GTRContactUs@ams.usda.gov

Grain Transportation Indicators

Table 1
Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
10/31/12	271	231	199	304	212	191
10/24/12	276	232	199	327	219	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)

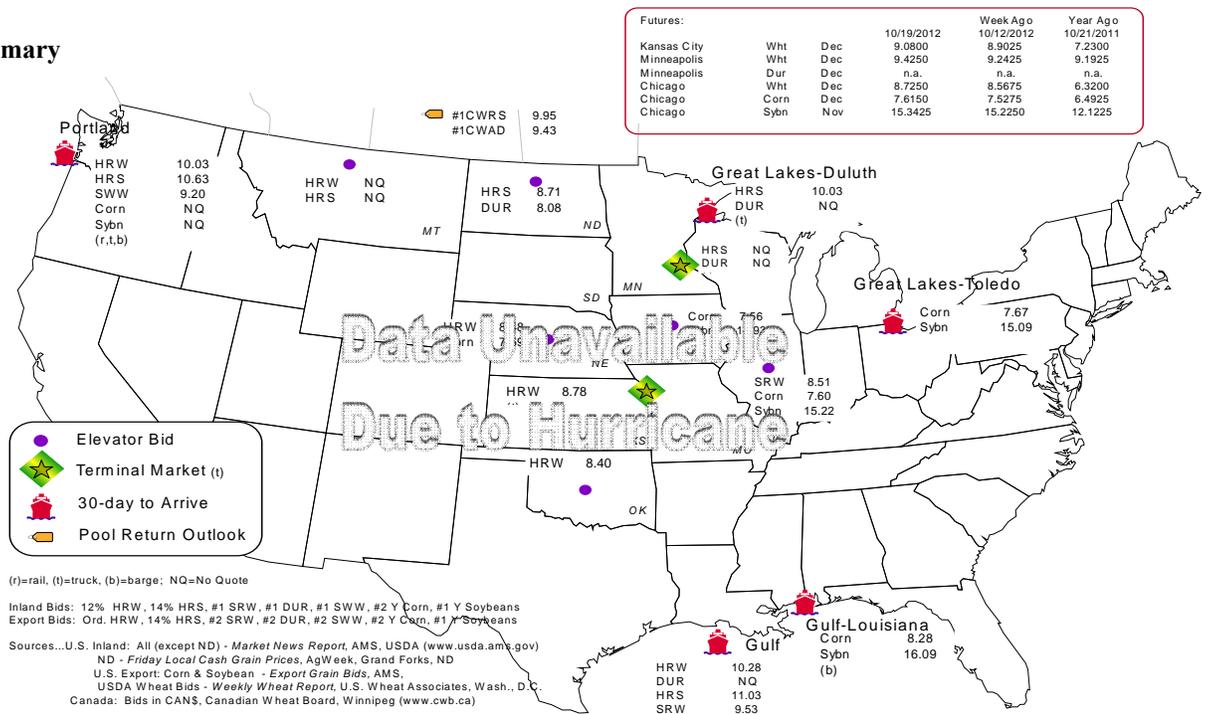
Commodity	Origin--Destination	10/19/2012	10/12/2012
Corn	IL--Gulf	0.68	-0.71
Corn	NE--Gulf	-0.09	-0.71
Soybean	IA--Gulf	-1.16	-1.25
HRW	KS--Gulf	-0.60	-1.55
HRS	ND--Portland	-1.92	-1.97

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 ³	Northwest	East Gulf	
10/24/2012 ^p	631	528	n/a	3,175	1,404	5,738
10/17/2012 ^r	1,905	737	n/a	3,366	766	6,774
2012 YTD ^r	13,050	34,071	n/a	164,813	15,615	267,683
2011 YTD ^r	25,399	72,078	n/a	151,742	18,746	307,911
2012 YTD as % of 2011 YTD	51	47	n/a	109	83	87
Last 4 weeks as % of 2011 ²	213	97	n/a	107	217	106
Last 4 weeks as % of 4-year avg. ²	91	49	n/a	89	124	79
Total 2011	27,358	77,515	48,782	191,187	24,088	368,930
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.

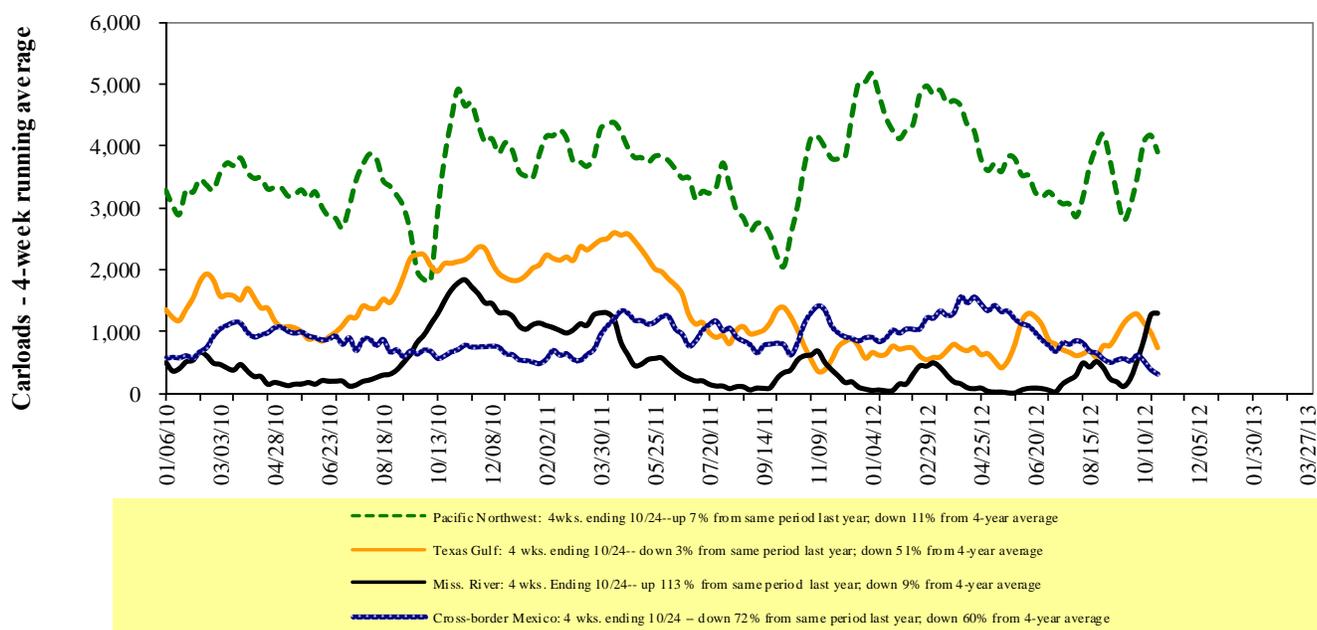
³ Data is unavailable.

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

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

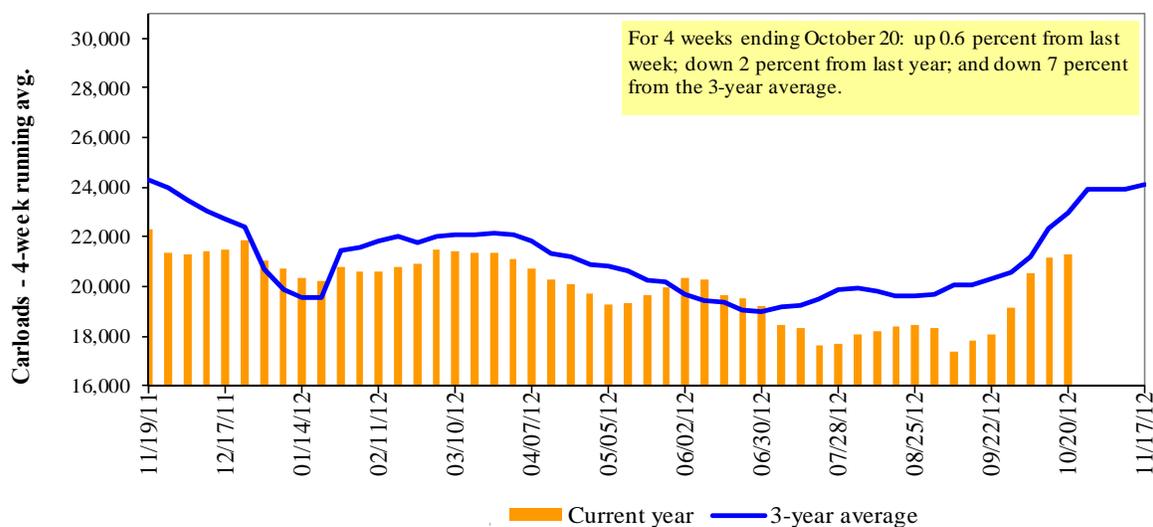
Table 4

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
10/20/12	2,044	2,749	11,126	712	3,837	20,468	4,347	5,871
This week last year	2,109	3,473	8,853	889	5,067	20,391	4,501	5,233
2012 YTD	68,935	116,034	416,652	21,624	207,201	830,446	162,358	205,218
2011 YTD	74,800	121,619	439,554	29,550	242,873	908,396	160,916	213,057
2012 YTD as % of 2011 YTD	92	95	95	73	85	91	101	96
Last 4 weeks as % of 2011 ¹	87	87	114	60	86	98	103	107
Last 4 weeks as % of 3-yr avg. ¹	74	85	107	58	75	90	103	106
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							
	Nov-12	Nov-11	Dec-12	Dec-11	Jan-13	Jan-12	Feb-13	Feb-12
BNSF ³								
COT grain units	0	no bids	no bids	no bids	no bids	no offer	no offer	no offer
COT grain single-car ⁵	0 . . 6	10 . . 25	1	20	0 . . 2	0	no offer	0
UP ⁴								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no offer	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.

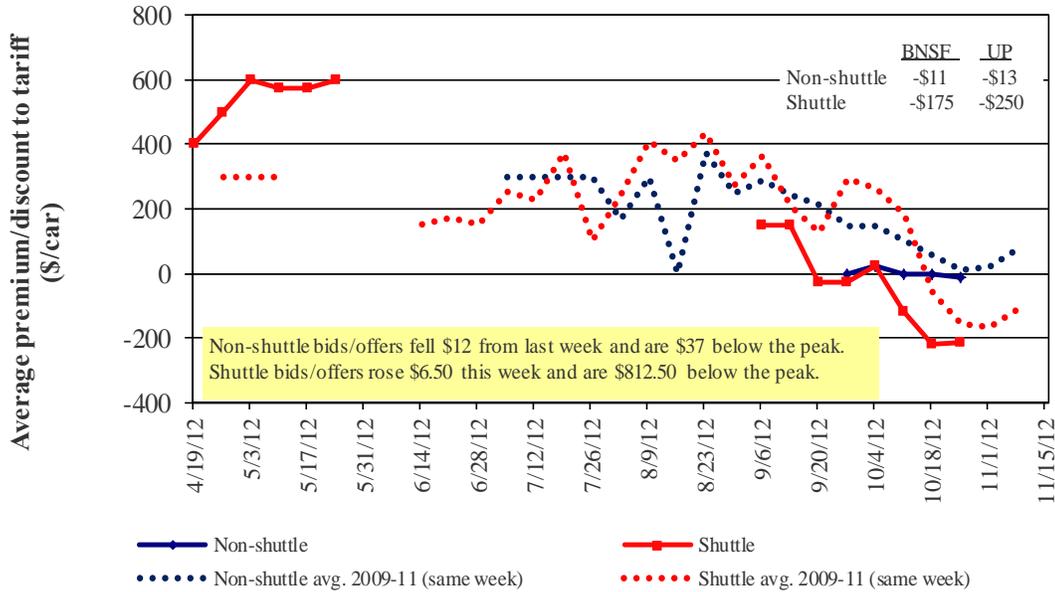
⁵Range is shown because average is not available. Not available = n/a.

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 November 2012, Secondary Market

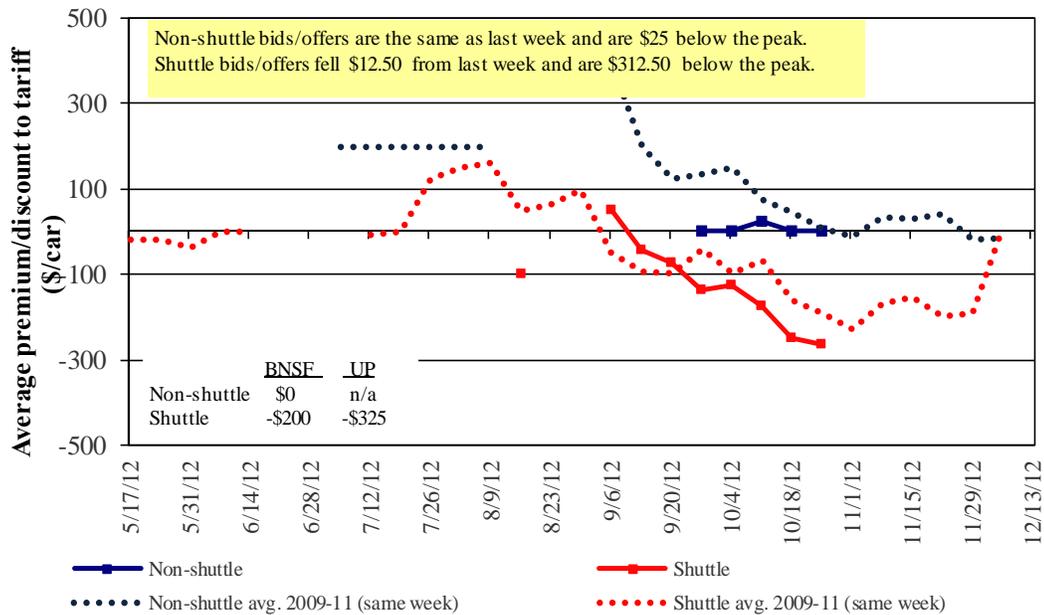


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

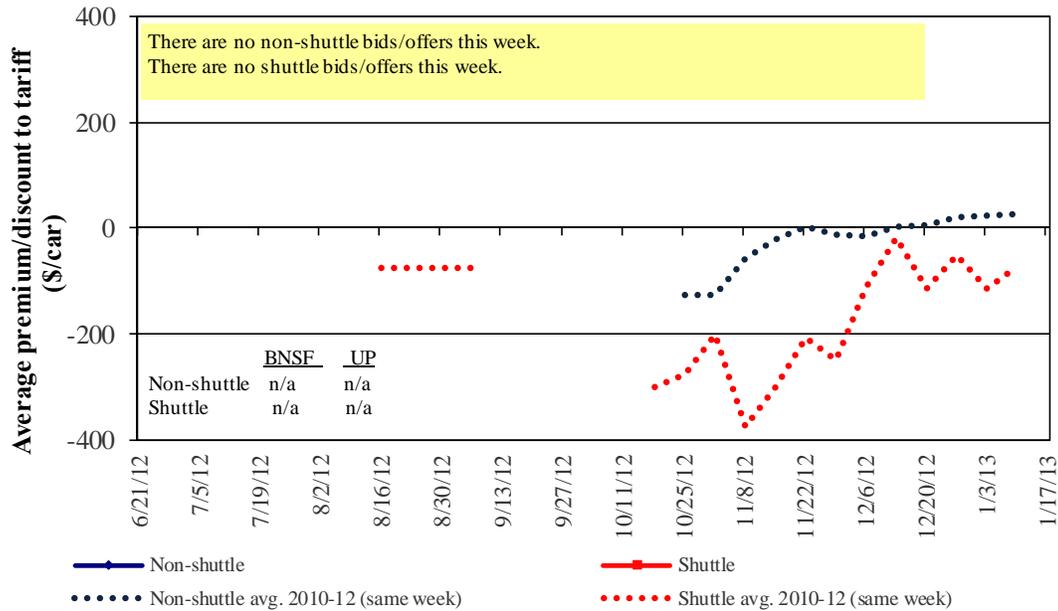


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in January 2013, 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					
	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13
Non-shuttle						
BNSF-GF	(11)	-	n/a	n/a	n/a	n/a
Change from last week	(11)	-	n/a	n/a	n/a	n/a
Change from same week 2011	22	-	n/a	n/a	n/a	n/a
UP-Pool	(13)	n/a	n/a	n/a	n/a	n/a
Change from last week	(13)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	10	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(175)	(200)	n/a	n/a	n/a	n/a
Change from last week	(62)	n/a	n/a	n/a	n/a	n/a
Change from same week 2011	188	n/a	n/a	n/a	n/a	n/a
UP-Pool	(250)	(325)	n/a	n/a	n/a	n/a
Change from last week	75	(75)	n/a	n/a	n/a	n/a
Change from same week 2011	200	-	n/a	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
10/1/2012	Origin region*	Destination region*	Tariff rate/car	surcharge per car	metric ton	bushe ^l ²	change Y/Y ³
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,144	\$192	\$33.13	\$0.90	5
	Grand Forks, ND	Duluth-Superior, MN	\$3,445	\$113	\$35.34	\$0.96	11
	Wichita, KS	Los Angeles, CA	\$6,026	\$581	\$65.61	\$1.79	6
	Wichita, KS	New Orleans, LA	\$3,645	\$338	\$39.56	\$1.08	4
	Sioux Falls, SD	Galveston-Houston, TX	\$5,573	\$477	\$60.08	\$1.64	3
	Northwest KS	Galveston-Houston, TX	\$3,912	\$371	\$42.53	\$1.16	4
	Amarillo, TX	Los Angeles, CA	\$4,112	\$516	\$45.95	\$1.25	4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,110	\$382	\$34.68	\$0.94	2
	Toledo, OH	Raleigh, NC	\$4,508	\$433	\$49.07	\$1.34	14
	Des Moines, IA	Davenport, IA	\$2,006	\$81	\$20.72	\$0.56	4
	Indianapolis, IN	Atlanta, GA	\$3,920	\$325	\$42.15	\$1.15	15
	Indianapolis, IN	Knoxville, TN	\$3,354	\$209	\$35.38	\$0.96	18
	Des Moines, IA	Little Rock, AR	\$3,154	\$238	\$33.68	\$0.92	3
Soybeans	Des Moines, IA	Los Angeles, CA	\$5,065	\$693	\$57.18	\$1.56	2
	Minneapolis, MN	New Orleans, LA	\$3,269	\$425	\$36.68	\$1.00	-3
	Toledo, OH	Huntsville, AL	\$3,575	\$308	\$38.56	\$1.05	3
	Indianapolis, IN	Raleigh, NC	\$4,578	\$436	\$49.79	\$1.36	3
	Indianapolis, IN	Huntsville, AL	\$3,267	\$209	\$34.51	\$0.94	3
Champaign-Urbana, IL	New Orleans, LA	\$3,599	\$382	\$39.54	\$1.08	6	
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	\$3,481	\$334	\$37.89	\$1.03	8
	Wichita, KS	Galveston-Houston, TX	\$3,634	\$260	\$38.67	\$1.05	15
	Chicago, IL	Albany, NY	\$3,771	\$406	\$41.48	\$1.13	4
	Grand Forks, ND	Portland, OR	\$4,963	\$578	\$55.02	\$1.50	6
	Grand Forks, ND	Galveston-Houston, TX	\$5,984	\$602	\$65.40	\$1.78	5
	Northwest KS	Portland, OR	\$4,793	\$608	\$53.63	\$1.46	2
Corn	Minneapolis, MN	Portland, OR	\$4,800	\$703	\$54.65	\$1.49	1
	Sioux Falls, SD	Tacoma, WA	\$4,760	\$644	\$53.67	\$1.46	1
	Champaign-Urbana, IL	New Orleans, LA	\$2,857	\$382	\$32.17	\$0.88	0
	Lincoln, NE	Galveston-Houston, TX	\$3,310	\$375	\$36.60	\$1.00	1
	Des Moines, IA	Amarillo, TX	\$3,430	\$299	\$37.03	\$1.01	0
	Minneapolis, MN	Tacoma, WA	\$4,800	\$698	\$54.59	\$1.49	1
Soybeans	Council Bluffs, IA	Stockton, CA	\$4,200	\$722	\$48.87	\$1.33	1
	Sioux Falls, SD	Tacoma, WA	\$5,340	\$644	\$59.43	\$1.62	6
	Minneapolis, MN	Portland, OR	\$5,330	\$703	\$59.91	\$1.63	6
	Fargo, ND	Tacoma, WA	\$5,230	\$573	\$57.62	\$1.57	6
	Council Bluffs, IA	New Orleans, LA	\$3,870	\$441	\$42.81	\$1.17	4
	Toledo, OH	Huntsville, AL	\$2,750	\$308	\$30.36	\$0.83	3
Grand Island, NE	Portland, OR	\$5,195	\$622	\$57.77	\$1.57	14	

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	\$611	\$85.34	\$2.32	4
	OK	Cuautitlan, EM	\$6,837	\$742	\$77.44	\$2.11	5
	KS	Guadalajara, JA	\$7,444	\$717	\$83.39	\$2.27	1
	TX	Salinas Victoria, NL	\$3,743	\$280	\$41.10	\$1.12	3
Corn	IA	Guadalajara, JA	\$7,699	\$843	\$87.28	\$2.21	3
	SD	Penjamo, GJ	\$7,776	\$800	\$87.62	\$2.22	7
	NE	Queretaro, QA	\$7,153	\$749	\$80.74	\$2.05	2
	SD	Salinas Victoria, NL	\$5,700	\$608	\$64.45	\$1.64	2
	MO	Tlalnepantla, EM	\$6,592	\$728	\$74.79	\$1.90	6
	SD	Torreon, CU	\$6,522	\$670	\$73.48	\$1.86	5
Soybeans	MO	Bojay (Tula), HG	\$7,580	\$711	\$84.72	\$2.30	10
	NE	Guadalajara, JA	\$8,134	\$814	\$91.42	\$2.49	5
	IA	El Castillo, JA ⁵	\$8,555	\$795	\$95.53	\$2.60	10
	KS	Torreon, CU	\$6,651	\$505	\$73.11	\$1.99	6
Sorghum	OK	Cuautitlan, EM	\$5,730	\$607	\$64.75	\$1.64	2
	TX	Guadalajara, JA	\$6,653	\$520	\$73.29	\$1.86	1
	NE	Penjamo, GJ	\$7,426	\$726	\$83.29	\$2.11	2
	KS	Queretaro, QA	\$6,460	\$456	\$70.66	\$1.79	3
	NE	Salinas Victoria, NL	\$5,178	\$534	\$58.36	\$1.48	5
	NE	Torreon, CU	\$6,068	\$596	\$68.09	\$1.73	1

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

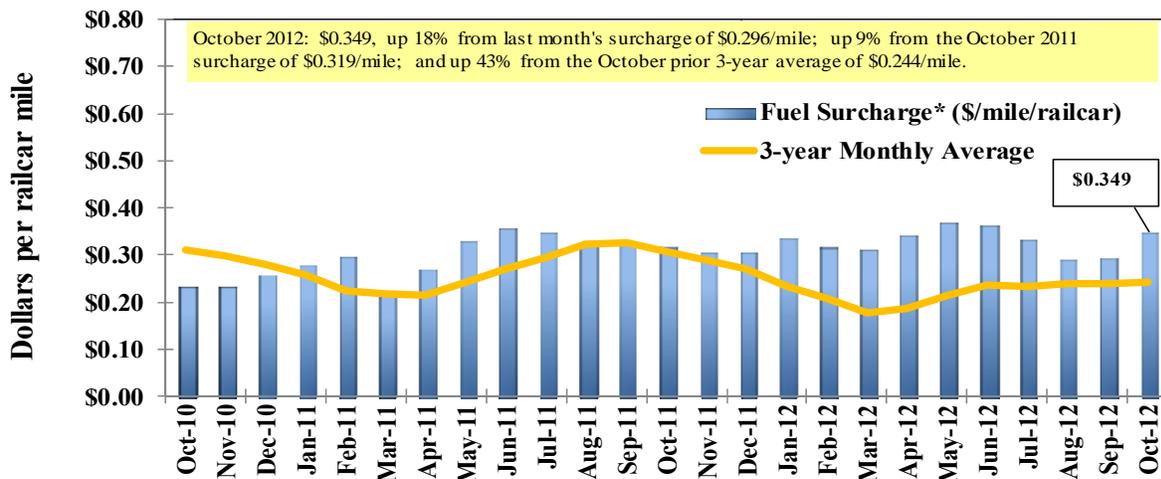
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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.

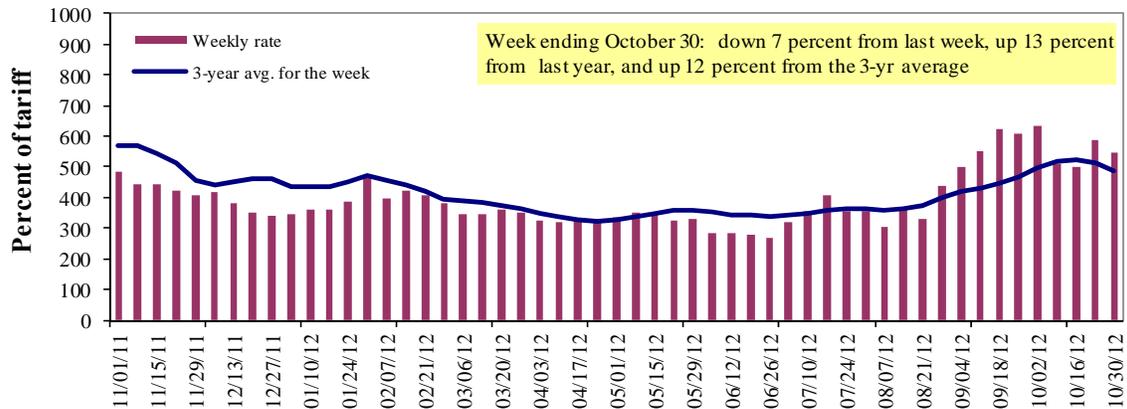
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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	10/30/2012	525	500	500	500	550	550	425
	10/23/2012	640	563	588	613	570	570	663
\$/ton	10/30/2012	32.50	26.60	23.20	19.95	25.80	22.22	13.35
	10/23/2012	39.62	29.95	27.28	24.46	26.73	23.03	20.82
Current week % change from the same week:								
	Last year	16	0	13	54	25	25	82
	3-year avg. ²	12	3	12	50	13	14	60
Rate¹	November	575	513	492	480	492	492	455
	January	-	-	432	367	378	378	333

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

Source: Transportation & Marketing Programs/AMS/USDA

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 9
Benchmark tariff rates

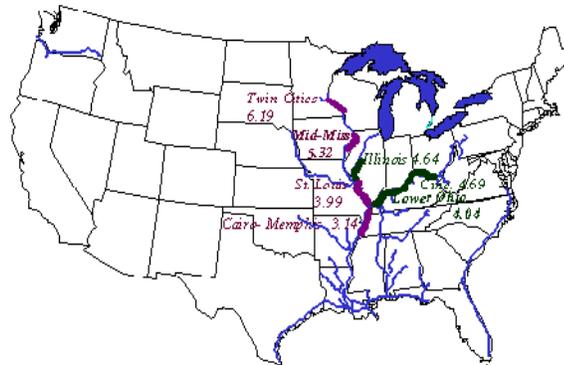
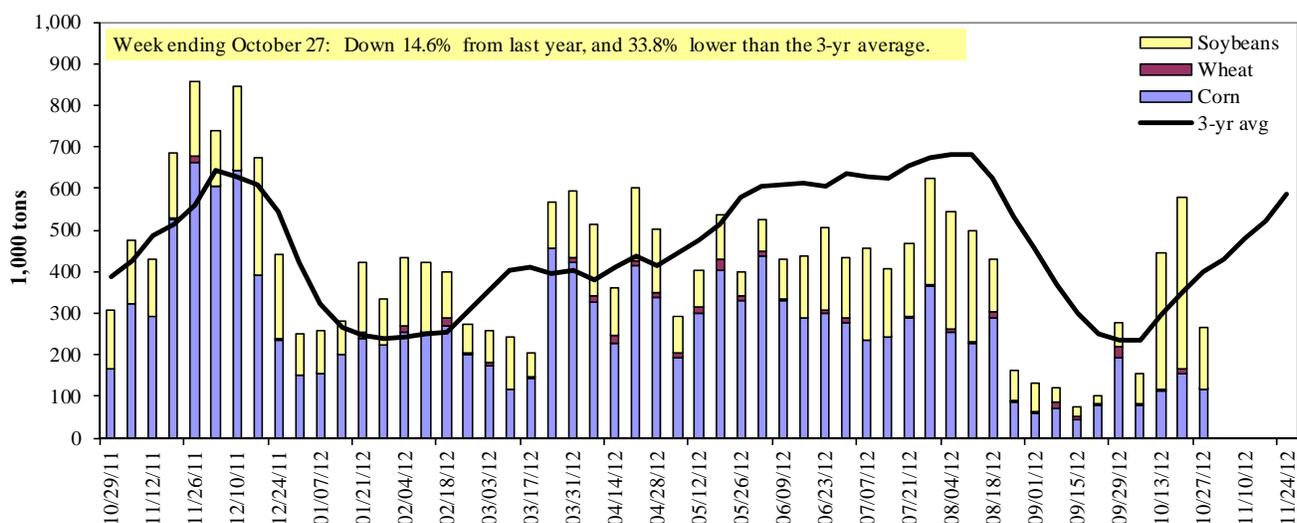


Figure 10

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 10/27/2012	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	56	3	68	0	127
Winfield, MO (L25)	63	2	96	0	160
Alton, IL (L26)	112	2	155	0	269
Granite City, IL (L27)	115	2	147	0	264
Illinois River (L8)	25	0	44	0	69
Ohio River (L52)	30	3	165	2	199
Arkansas River (L1)	3	14	36	0	53
Weekly total - 2012	148	19	349	2	517
Weekly total - 2011	322	8	327	23	681
2012 YTD ¹	12,868	1,649	8,933	214	23,665
2011 YTD	15,429	1,279	5,969	346	23,022
2012 as % of 2011 YTD	83	129	150	62	103
Last 4 weeks as % of 2011 ²	48	49	138	37	89
Total 2011	19,921	1,460	8,553	422	30,356

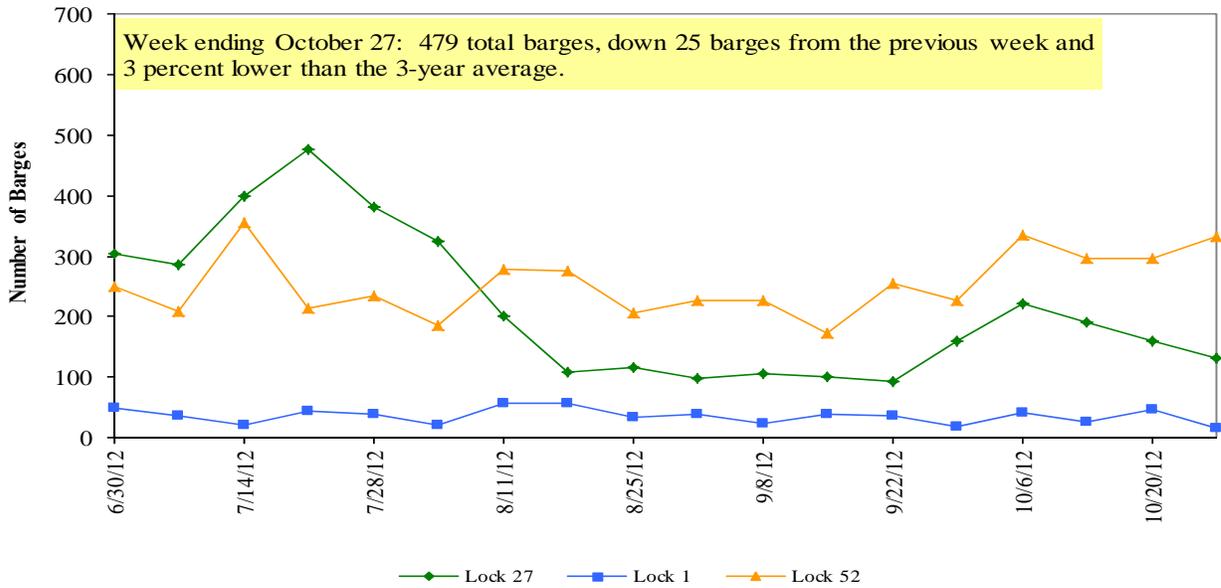
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

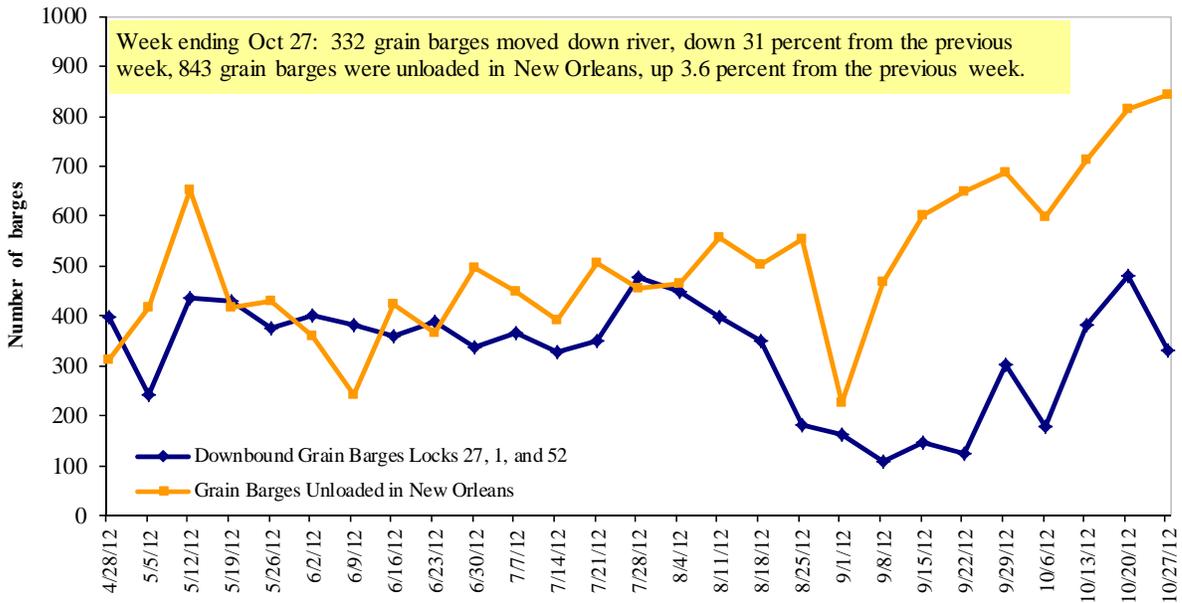
Source: U.S. Army Corps of Engineers (www.mvr.usace.army.mil/mvrimi/omni/webprts/default.asp)

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 10/29/2012 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	4.036	-0.072	0.150
	New England	4.205	-0.038	0.270
	Central Atlantic	4.149	-0.054	0.155
	Lower Atlantic	3.921	-0.090	0.085
II	Midwest ²	3.984	-0.117	0.118
III	Gulf Coast ³	3.945	-0.054	0.137
IV	Rocky Mountain	4.195	-0.048	0.236
V	West Coast	4.187	-0.111	0.080
	West Coast less California	4.092	-0.103	-
	California	4.268	-0.117	0.105
Total	U.S.	4.030	-0.086	0.138

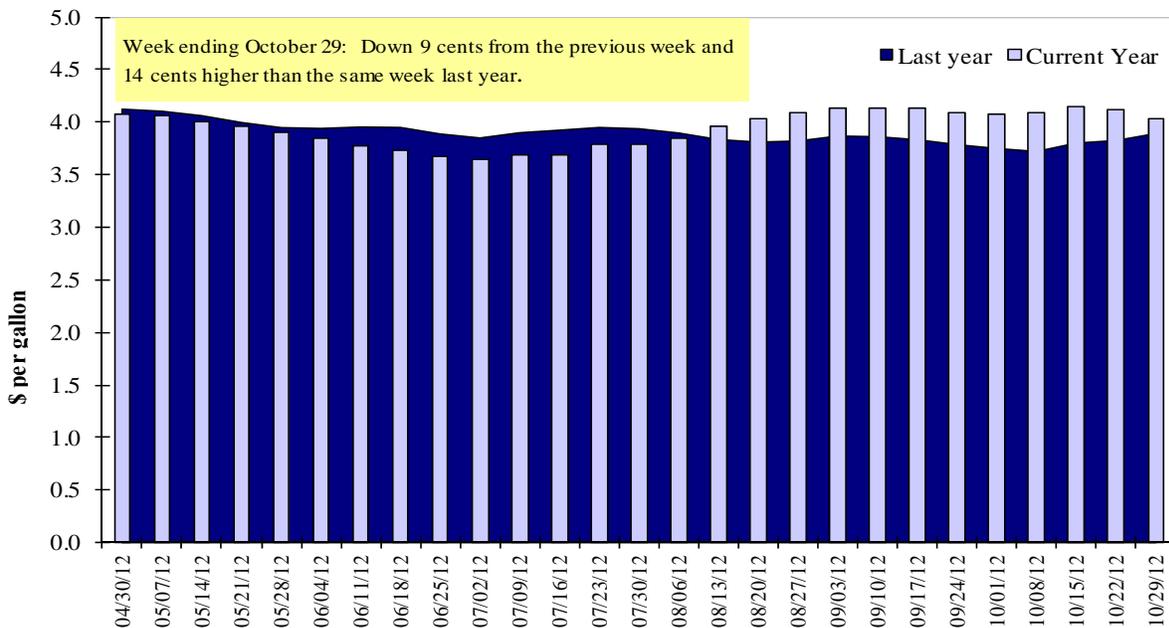
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
10/18/2012	1,482	628	1,209	839	72	4,228	7,415	18,671	30,314
This week year ago	1,342	792	1,258	1,041	78	4,511	15,488	14,171	34,170
Cumulative exports-marketing year²									
2012/13 YTD	4,105	1,396	2,539	1,834	241	10,115	3,327	6,343	19,785
2011/12 YTD	4,831	1,483	2,845	1,963	237	11,357	4,979	4,141	20,477
YTD 2012/13 as % of 2011/12	85	94	89	93	102	89	67	153	97
Last 4 wks as % of same period 2011/12	101	79	88	75	119	88	50	142	93
2011/12 Total	9,904	4,319	6,312	5,601	491	26,627	37,900	36,727	101,254
2010/11 Total	15,837	2,828	8,623	4,717	979	32,984	44,569	39,753	117,306

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year begins for corn and soybeans

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 10/18/12	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	2,936	4,520	(35)	12,367
Mexico	2,614	3,813	(31)	9,617
China	979	1,983	(51)	5,414
Korea	416	1,684	(75)	3,639
Venezuela	172	155	11	1,332
Top 5 importers	7,116	12,156	(41)	32,369
Total US corn export sales	10,743	20,467	(48)	39,120
% of Projected	37%	52%		
Change from prior week	142	336		
Top 5 importers' share of U.S. corn export sales	66%	59%		83%
USDA forecast, October 2012	29,210	39,120	(25)	
Corn Use for Ethanol USDA forecast, Ethanol October 2012	114,300	127,000	(10)	

(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 (Carry-over plus Accumulated Exports)

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 10/18/2012	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 -
China	15,341	12,751	20	24,602
Mexico	917	1,126	(19)	3,180
Japan	686	670	2	1,891
Indonesia	348	448	(22)	1,741
Egypt	218	172	27	1,292
Top 5 importers	17,510	15,167	15	32,706
Total US soybean export sales	25,014	18,312	37	37,010
% of Projected	73%	49%		
Change from prior week	522	227		
Top 5 importers' share of U.S. soybean export sales	70%	83%		
USDA forecast, October 2012	34,430	37,010	(7)	

(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. (Carryover plus Accumulated Exports)

Table 15

Top 10 Importers¹ of All U.S. Wheat

Week Ending 10/18/2012	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	1,915	2,114	(9)	3,512
Mexico	1,955	2,073	(6)	3,496
Nigeria	1,674	1,726	(3)	3,248
Philippines	1,320	1,361	(3)	2,039
Korea	948	656	45	1,983
Egypt	148	247	(40)	950
Taiwan	552	455	21	888
Indonesia	371	472	(22)	830
Venezuela	466	353	32	594
Iraq	209	572	(63)	572
Top 10 importers	9,556	10,029	(5)	18,111
Total US wheat export sales	14,343	15,868	(10)	28,560
% of Projected	46%	56%		
Change from prior week	572	317		
Top 10 importers' share of U.S. wheat export sales	67%	63%		63%
USDA forecast, October 2012	31,300	28,560	10	

(n) indicates negative number.

¹Modified from the FAS 2011/12 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 10/25/12	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	117	153	76	11,149	12,165	92	44	54	13,995
Corn	0	0	94	5,005	7,112	70	3	3	9,198
Soybeans	435	419	104	7,889	5,391	146	118	102	7,321
Total	552	573	96	24,043	24,667	97	88	85	30,513
Mississippi Gulf									
Wheat	69	129	53	4,795	4,451	108	128	100	5,031
Corn	344	199	173	16,206	21,971	74	58	60	26,267
Soybeans	967	992	97	16,727	13,338	125	159	132	19,262
Total	1,379	1,320	105	37,728	39,760	95	107	98	50,560
Texas Gulf									
Wheat	66	117	57	5,204	9,954	52	69	57	10,837
Corn	0	0	n/a	336	832	40	29	5	1,021
Soybeans	139	72	193	376	763	49	n/a	109	926
Total	206	190	108	5,916	11,550	51	135	67	12,784
Interior									
Wheat	12	30	42	1,012	937	108	142	131	1,110
Corn	47	64	74	5,589	5,978	93	69	63	7,509
Soybeans	99	126	78	3,581	3,507	102	53	99	4,273
Total	159	221	72	10,182	10,422	98	116	86	12,892
Great Lakes									
Wheat	0	19	0	371	889	42	125	46	1,038
Corn	0	0	n/a	56	159	35	0	0	178
Soybeans	76	48	159	393	152	259	189	94	382
Total	76	67	114	820	1,200	68	160	71	1,598
Atlantic									
Wheat	0	0	n/a	341	655	52	656	106	686
Corn	3	2	210	139	235	59	14	5	295
Soybeans	10	62	16	718	536	134	191	105	1,042
Total	13	63	20	1,198	1,427	84	142	56	2,022
U.S. total from ports²									
Wheat	264	448	59	22,872	29,051	79	69	65	32,697
Corn	395	265	149	27,330	36,287	75	53	54	44,466
Soybeans	1,726	1,719	100	29,684	23,687	125	142	115	33,205
Total	2,385	2,433	98	79,885	89,025	90	99	88	110,369

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

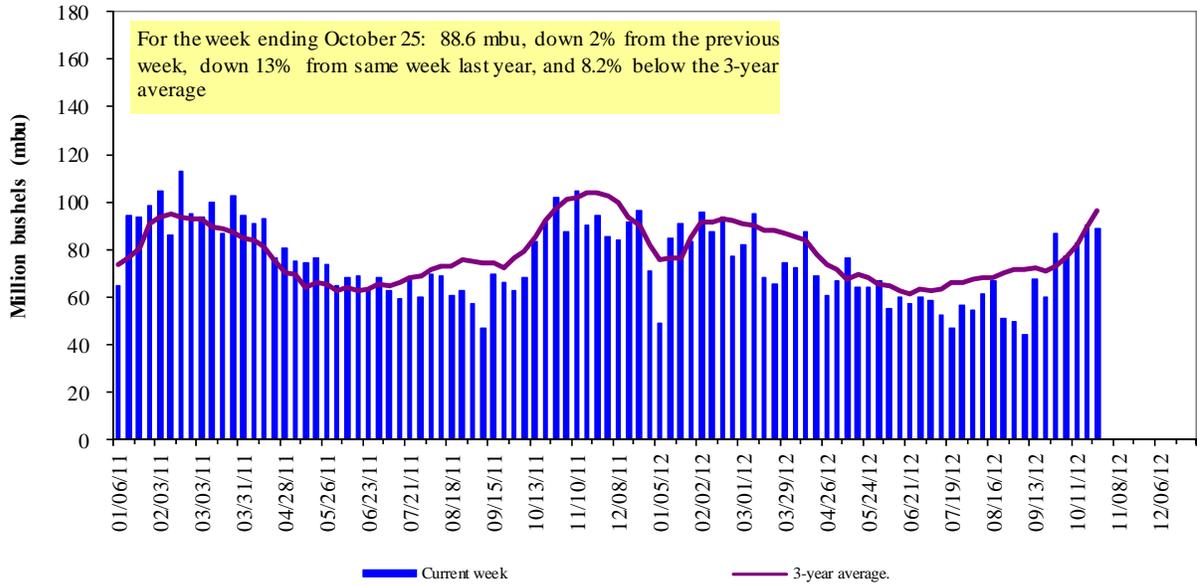
² Total includes only port regions shown above; Interior land-based shipments now included.

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)

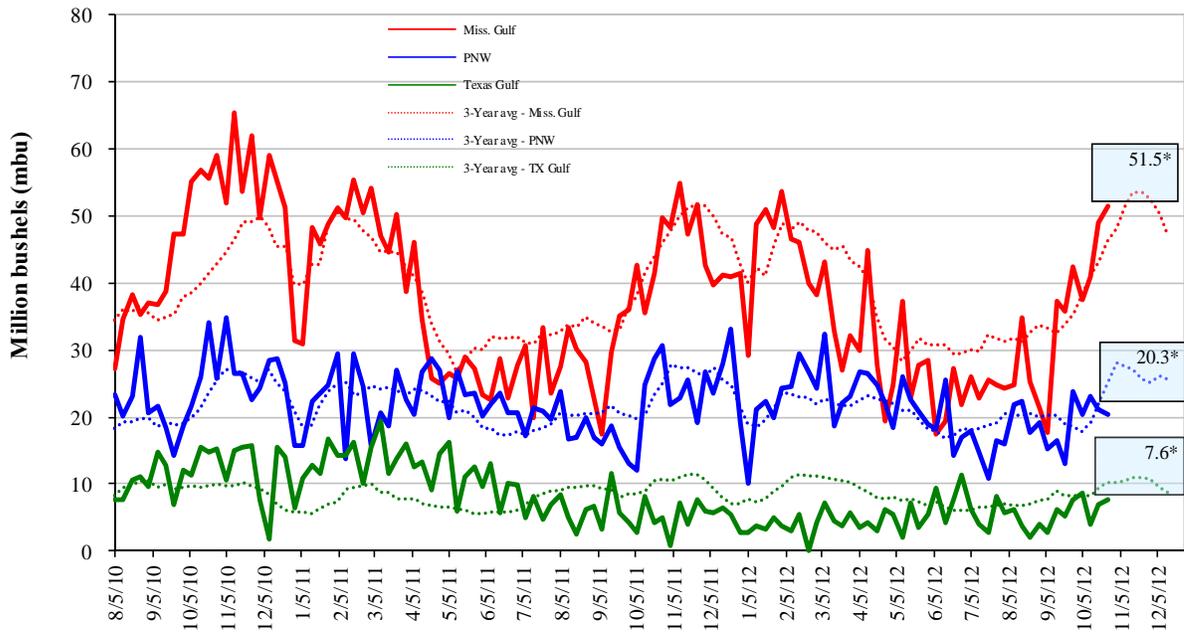


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

October 25 % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 5	up 9	up 5	down 4
Last year (same week)	up 4	up 50	up 8	down 34
3-yr avg. (4-wk mov. avg.)	up 12	down 26	up 5	down 28

Ocean Transportation

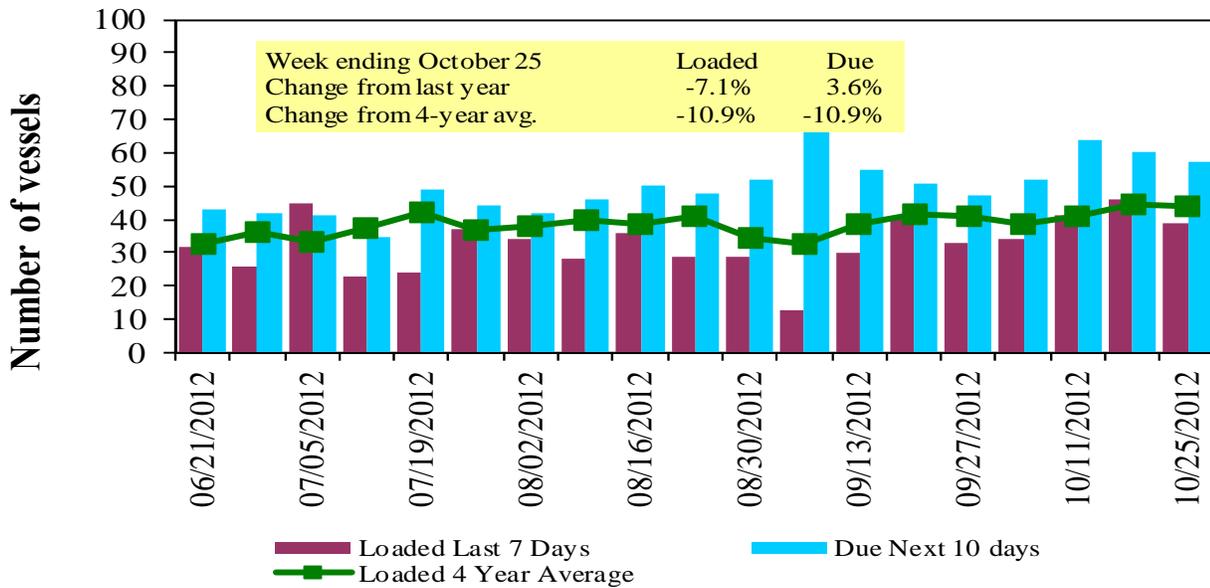
Table 17

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
10/25/2012	50	39	57	17	n/a
10/18/2012	49	46	60	16	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

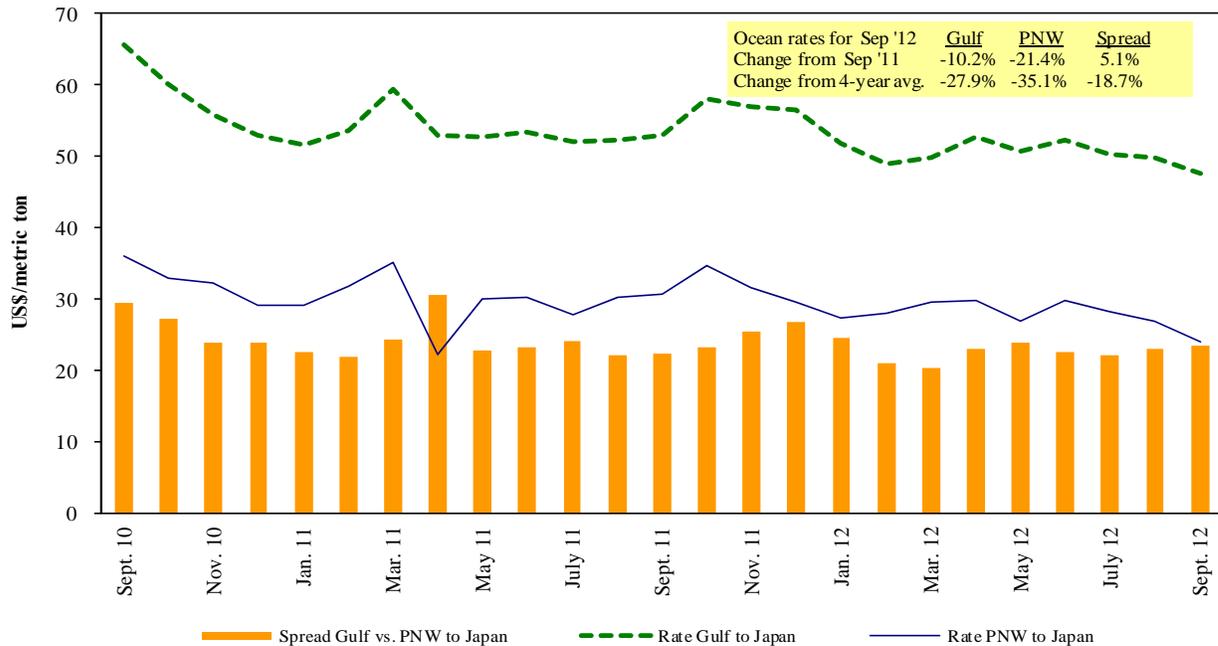
Figure 16
U.S. Gulf^d Vessel Loading Activity



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 10/27/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy Grain	Nov 15/25	55,000	49.00
U.S. Gulf	China	Heavy Grain	Nov 10/20	55,000	46.00
U.S. Gulf	China	Heavy Grain	Nov 9/19	55,000	48.00
U.S. Gulf	China	Heavy Grain	Nov 5/10	55,000	46.00
U.S. Gulf	China	Heavy Grain	Oct 20/30	55,000	43.75
U.S. Gulf	China	Heavy Grain	Oct 15/24	5,500	43.00
U.S. Gulf	China	Heavy Grain	Sep 20/30	55,000	48.00
U.S. Gulf	China	Heavy Grain	Sep 13/22	55,000	45.50
U.S. Gulf	Mozambique ¹	Wheat	Sep 20/30	10,000	211.50
France	Algeria	Wheat	Nov 2/7	25,000	22.00
India	S.Korea	Wheat	Oct5/15	55,000	15.00
Mexico	Turkey	Wheat	Sep 10/25	55,000	24.75
River Plate	Tunisia	Heavy Grain	Oct 5/15	30,000	28.50
River Plate	Tunisia	Soybean Meal	Sep 1/10	25,000	36.00
Ukraine	S. Arabia	Barley	Oct 25/30	56,500	25.25

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

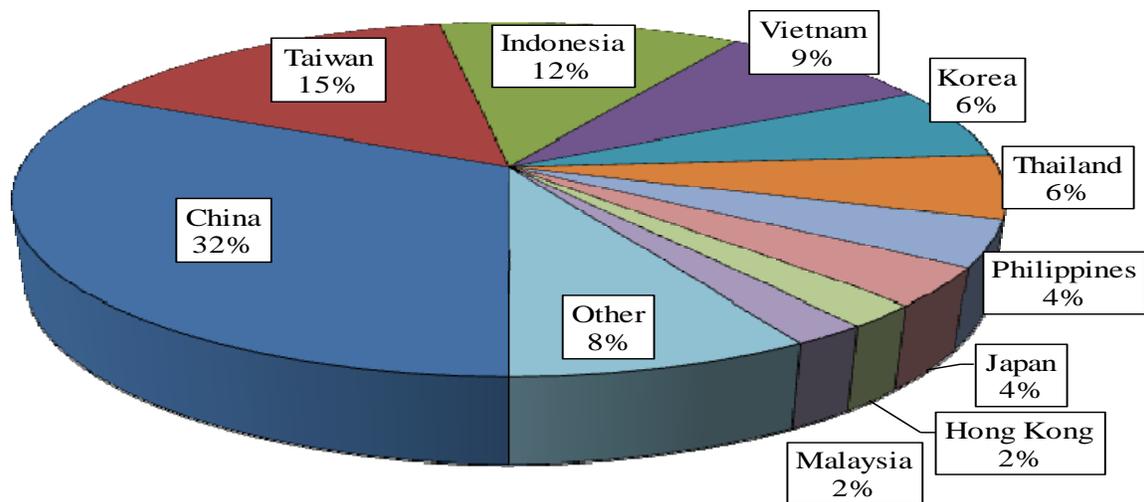
¹50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

In 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 in containers, 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, July 2012

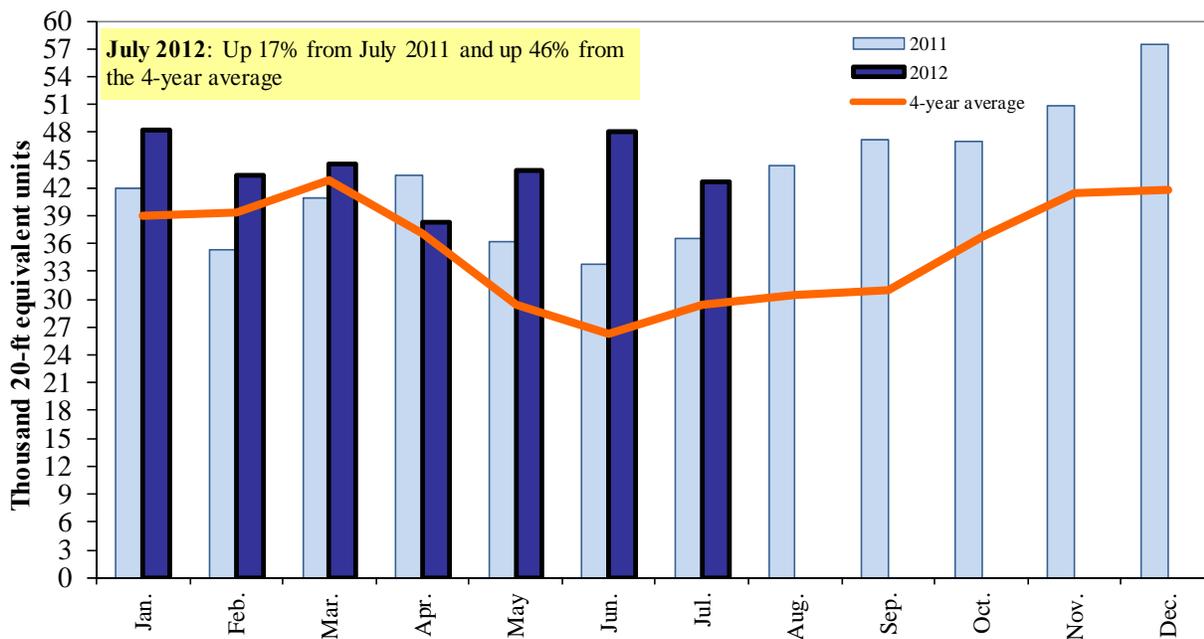


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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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