



## WEEKLY HIGHLIGHTS

May 13, 2010

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The next  
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### [USDA Increases Projected Corn and Soybean Use; Transportation Demand is Likely to Rise](#)

Grain and oilseed transportation demand for the 2009/2010 crop year is expected to be up 6 percent from the prior marketing year. In its May [World Agricultural Supply and Demand Estimates](#), USDA forecast the domestic use to be up 7 percent from the prior year, while demand for exports is expected to be up 2.7 percent. USDA raised the 2009/10 corn export forecast from the previous month by 50 million bushels (mbu) to 2,000 (mbu) based on recent strong sales and shipments. The volume of corn expected to be used for ethanol was raised by 10 mbu to 4,300 mbu. Soybean exports were increased by 10 mbu to a record 1,455 (mbu). Wheat use remained unchanged from the April report.

### [Higher Barge Movements and More Vessels Indicate an Increase in Gulf Grain Exports](#)

Increased downbound grain barge movements on the Mississippi River, and an increased number of expected vessels, could indicate an increase in grain exports from the U.S. Gulf. For the week ending May 8, [barge grain movements](#) totaled 854,998 tons—66 percent higher than the previous week and 40 percent higher than the same period last year. During the week ending May 6, 52 [ocean-going grain vessels](#) are expected to be loaded in the U.S. Gulf within the next 10 days—11 percent more than the previous week and 13 percent higher than last year. The last time barge movements and expected vessels were this high was March 12 and March 1. The most likely factor for this activity is the strong pace of corn export sales that have averaged at 1.4 million metric ton per week over the past 5 weeks. The main destinations include Mexico, Korea, Egypt, and most recently, China.

### [Corn Shipments Boost Mississippi Gulf Grain Inspections](#)

The Mississippi Gulf [grain inspections](#) at .675 per metric ton (mmt) increased 16 percent from the past week, due mainly to a 44 percent boost in corn shipments, which were destined primarily to Asia. Wheat inspections also increased in the Mississippi Gulf, driven by increased shipments to Africa and Mexico. Pacific Northwest (PNW) wheat inspections reached the highest level since September 24, 2009, and were 22 percent above the past week. The increased PNW wheat inspections were due to exports destined mainly to Asia and South America. For the week ending May 5, total inspections of grain (corn, wheat, and soybeans) from major U.S. export regions reached 1.38 mmt, up 3 percent from the past week but 16.3 percent below last year. Total soybean inspections, down 29 percent from the past week, continued to slide due to fewer shipments to Asia as the South American soybean shipping season continues.

## Snapshots by Sector

### [Rail](#)

U.S. Railroads originated 22,292 [carloads of grain](#) during the week ending May 1, up 10 percent from last week, 25 percent from the same week last year, and 8 percent higher than the 3-year average.

During the week ending May 8, average [May secondary railcar bids/offers](#) were \$5 below tariff for non-shuttle, \$1 lower than last week. Shuttle rates were \$269 below tariff, \$28 lower than last week.

### [Ocean](#)

During the week ending May 6, 31 [ocean-going grain vessels](#) were loaded in the Gulf, up 3 percent from last year.

During the week ending May 7, the cost of shipping grain from the Gulf to Japan averaged \$72 per mt, up 3 percent from the previous week. The rate from the Pacific Northwest to Japan was \$42 per mt, up 5 percent from the previous week.

### [Fuel](#)

During the week ending May 10, U.S. average [diesel fuel prices](#) increased 1 cent per gallon to \$3.13—0.16 percent higher than the previous week and 41 percent higher than the same week last year

## Grain Transportation Update

Early corn planting, favorable corn progress, increased exports and a positive outlook for the economy are expected to increase transportation demand during the remainder of 2010. Total production and use of major grains and soybeans is projected to increase in 2010/11, although at a slower pace than in 2009/10. The year-to-date grains inspected for exports are 6 percent higher than last year. Most of the inspected grains are being shipped to Asia and Latin America. Soybean and wheat inspections increased year-to-date, but corn inspections remained mostly unchanged.

### Early Planting and Favorable Corn Progress Could Impact Grain Transportation Demand

For the week of May 9, U.S. corn planting is 81 percent complete, compared to the 2005–2009 average of 62 percent complete. This year, the weather has been more favorable than usual for planting—much better than last year. At this time last year, only 46 percent of the corn had been planted. Illinois, Indiana, and Minnesota are 29 percentage points or more ahead of the five-year average and Iowa corn is 22 percentage points ahead of the normal pace. Corn emergence is also ahead of pace at 39 percent when compared with the 2005–2009 average of 21 percent. If the overall progress of the corn crop stays ahead of the past two years, when extremely wet conditions slowed progress significantly, the corn harvest and the resulting transportation demand could be 2–4 weeks earlier than in 2008 or 2009.

### USDA Projects Higher Domestic Use of Major Grains in 2010/11

On May 11, USDA issued its first official outlook for the next marketing year for corn, soybeans, and wheat. Total exports of the major grains are projected to remain almost unchanged, but domestic usage is expected to grow over 1 percent after increasing by 7.4 percent during the previous year. Domestic use increases are mainly due to higher use of corn in ethanol production. Total wheat use is also projected to increase due to lower prices making U.S. wheat more competitive on the global market, and due to higher food and feed use domestically.

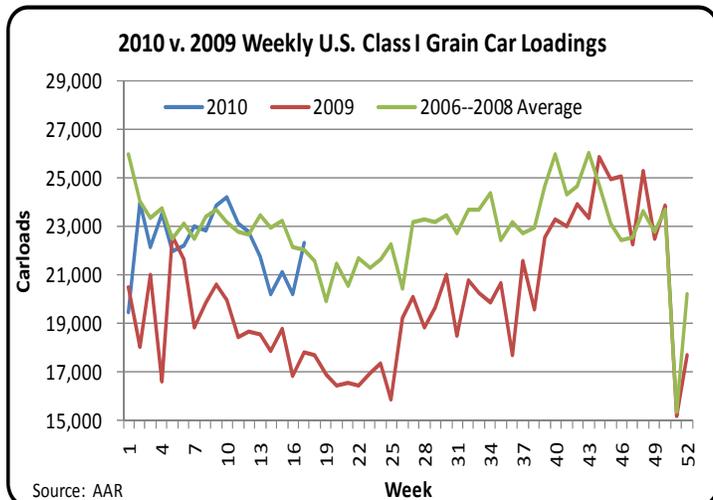
Major Grains: Production and Use, May 2010 WASDE.					
	Corn	Soybeans	Wheat	Total	Y/Y
-- million bushels --					
2010/11 (Projected)					
Production	13,370	3,310	2,043	18,723	0.2%
Exports	2,000	1,350	900	4,250	-0.5%
Domestic Use	11,300	1,794	1,206	14,300	1.1%
2009/10 (Estimated)					
Production	13,110	3,359	2,216	18,685	6.4%
Exports	1,950	1,455	865	4,270	2.7%
Domestic Use	11,105	1,868	1,173	14,146	7.4%
2008/09					
Production	12,092	2,967	2,499	17,558	
Exports	1,858	1,283	1,015	4,156	
Domestic Use	10,198	1,764	1,206	13,168	

### Ocean Freight Rates Continue to be Stable

Increasing vessel supply continues to keep the ocean freight rates for shipping bulk grain at moderate levels. Ocean freight rates are expected to be moderate for the most of 2010 because the global economy has not fully recovered from the economic slowdown. In addition, more vessels are scheduled for delivery between now and 2012. Finally, scrapping of older vessels has been slower than expected in 2009. As of May 7, the cost of shipping grain from the Gulf to Japan averaged \$72 per metric ton (mt). The rate from the Pacific Northwest to Japan was \$42 per mt. The rates were 49 percent below their record levels of \$141 and \$82 set on 5/16/2008 and 6/27/2008, respectively. With the early planting and favorable corn emergence, moderate ocean rates could boost exports.

### Rail Grain Car Loadings Stronger in 2010

Except for the first and fifth weeks of 2010, Class I railroad grain car loadings have been above 2009, but generally below the 2006–08 average. For the first 17 weeks of 2010, grain car loadings are up 16 percent (378,689 railcars compared to 326,395) from the same period in



2009, but 4.1 percent lower than the 2006-08 average (394,706). Due to the large 2009/10 grain and oilseeds crop, railcar loadings for the next 3 months are expected to be close to the 2006-08 average.

### **Average Diesel Fuel Prices Forecast to be Over \$3 per Gallon in 2010**

U.S. on-highway diesel fuel prices from January through April of this year have averaged \$2.91 per gallon. According to the Energy Information Administration's (EIA) latest Short-Term Energy Outlook, diesel fuel retail prices, which averaged \$2.46 per gallon in 2009, are forecast to average \$3.05 per gallon in 2010. Total crude oil consumption for the second quarter of 2010 is projected to be 360,000 barrels per day greater than the same period last year. Energy production, shipments, and prices have not been significantly affected by the oil spill following the April 20 explosion aboard the Deepwater Horizon drilling rig. The Deepwater Horizon mobile offshore drilling unit was drilling an exploratory well and was not producing oil at the time of the incident. The EIA says that oil markets are focusing more on inventories and increased economic activity than on any potential oil-spill-related transportation disruptions in the Gulf of Mexico.

### **Flooding Delays Rail and Truck Transportation in the Southeast**

Tributaries and rivers in Kentucky and Tennessee are slowly returning to normal levels after record rains and flooding hit the area starting May 1. On May 3, the crest of 51.86 feet on the Cumberland River at Nashville, TN, was the highest level recorded since the Cumberland River dam system was built in the early 1960s. Class I railroads used rerouting plans to minimize traffic delays, but so much track and so many assets were affected that delays through the area to Southeastern U.S. destinations reached 72 hours. Several railroads also reported bridge damage, with some needing up to 6 weeks for repairs. According to the 2008 Surface Transportation Board's confidential waybill sample, over 26,000 tons of grains and oilseeds and more than 54,000 tons of farm products moved through this region during that week in May 2008. Nearly all of the flooded highways around Nashville, TN, and in western KY and TN are back in use, leaving only a few state highways in the western one-third of Tennessee flooded.

### **Maritime Movements Currently Unaffected by the Gulf of Mexico Oil Spill**

The maritime transportation system has not been significantly affected by the April 20 Gulf of Mexico oil leak disaster, but U.S. Gulf Ports and government officials are concerned about its potential impact. The Southwest Pass, the main Mississippi River shipping channel for U.S. agricultural exports, remains open and free of any restrictions to marine traffic. It is the intent of the U.S. Coast Guard Captain of the Port of New Orleans to facilitate the movement of marine traffic to the fullest extent possible throughout the duration of the oil spill response. To that end, the Coast Guard will examine all measures necessary to ensure commerce through the Mississippi River and the Intracoastal Waterway continues with a minimum of restrictions. It is possible that heavy oil contamination could cause delays or close ports in the future. However, at this time, the heavily contaminated areas are not near ports and all ports in the region remain open. Vessel cleaning stations have been established to keep river traffic moving and clear of contamination.

[GTRContactUs@ams.usda.gov](mailto:GTRContactUs@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
05/12/10	210	90	213	322	298
05/05/10	210	92	189	313	284

<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)

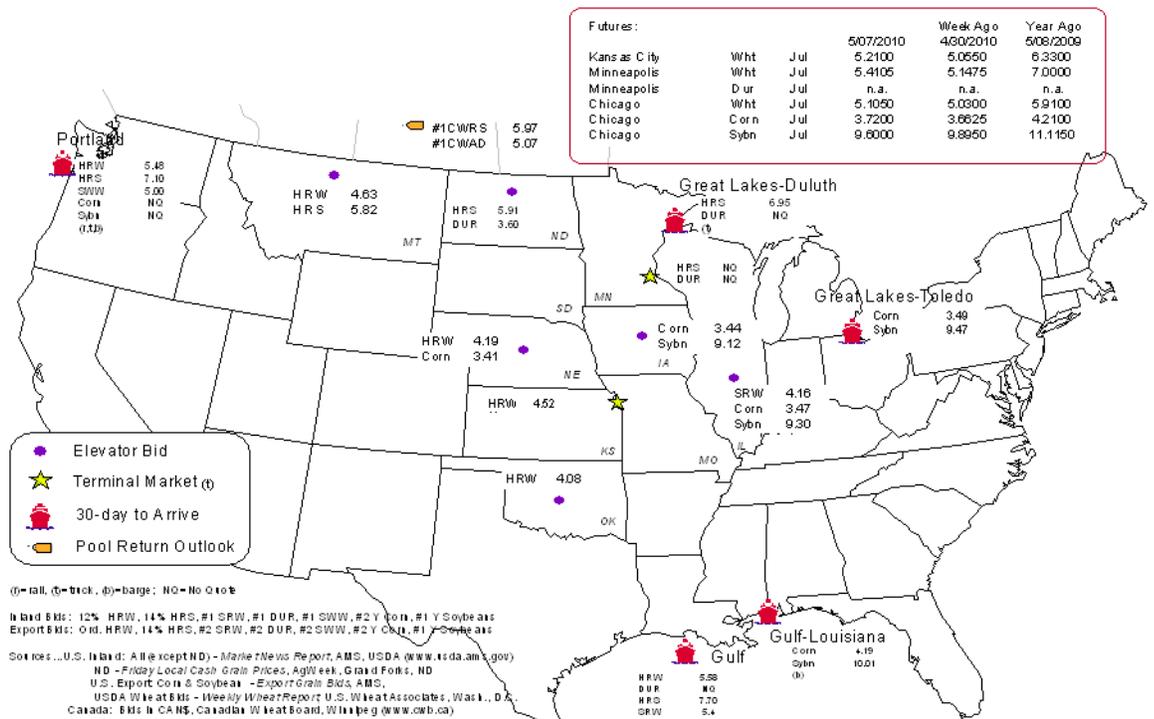
Commodity	Origin--Destination	5/7/2010	4/30/2010
Corn	IL--Gulf	-0.72	-0.65
Corn	NE--Gulf	-0.78	-0.73
Soybean	IA--Gulf	-0.89	-0.83
HRW	KS--Gulf	-1.06	-1.26
HRS	ND--Portland	-1.19	-1.55

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 mar-

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	
5/05/2010 <sup>p</sup>	107	1,050	884	3,582	291	5,914
4/28/2010 <sup>r</sup>	198	1,033	889	2,908	270	5,298
2010 YTD	6,813	26,461	16,554	61,249	16,009	127,086
2009 YTD	11,921	17,142	14,169	62,746	10,532	116,510
2010 YTD as % of 2009 YTD	57	154	117	98	152	109
Last 4 weeks as % of 2009 <sup>2</sup>	127	138	161	92	89	107
Last 4 weeks as % of 4-year avg. <sup>2</sup>	22	63	121	74	78	73
Total 2009	33,423	57,646	36,738	175,965	30,328	334,100
Total 2008	68,768	107,542	37,491	255,852	33,028	502,681

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

<sup>2</sup> Compared with same 4-weeks in 2008 and prior 4-year average.

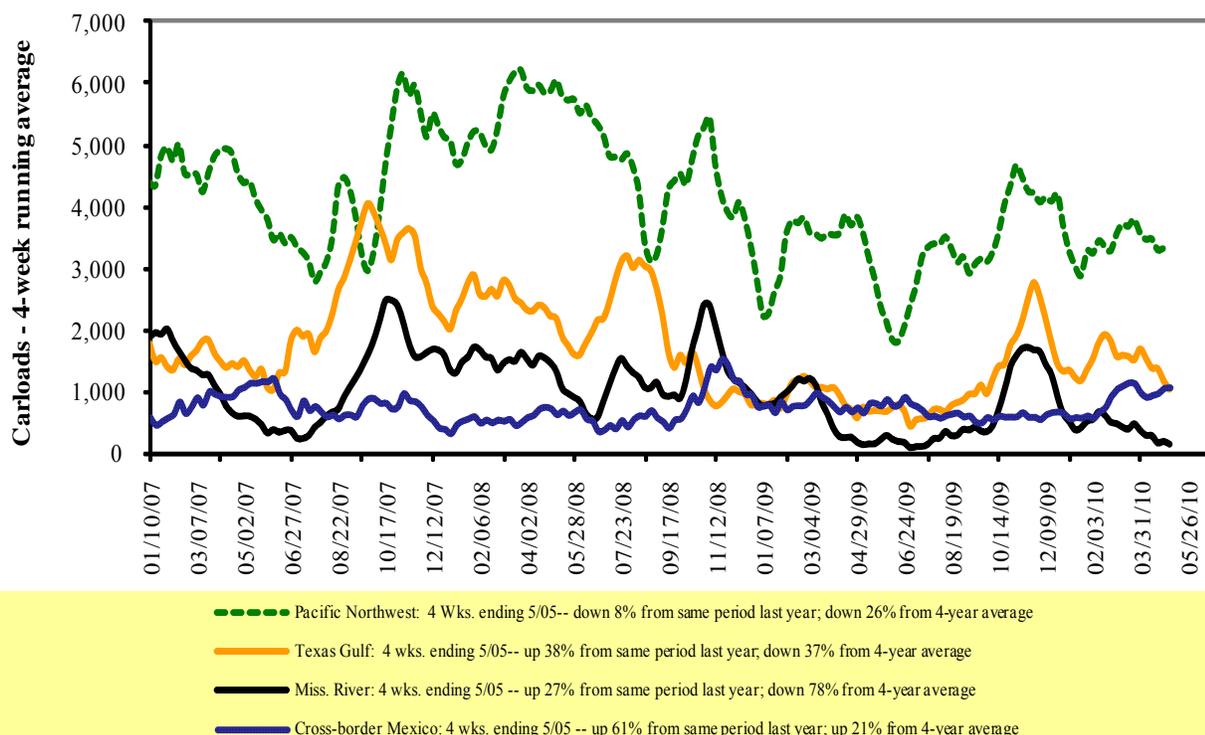
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available**

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

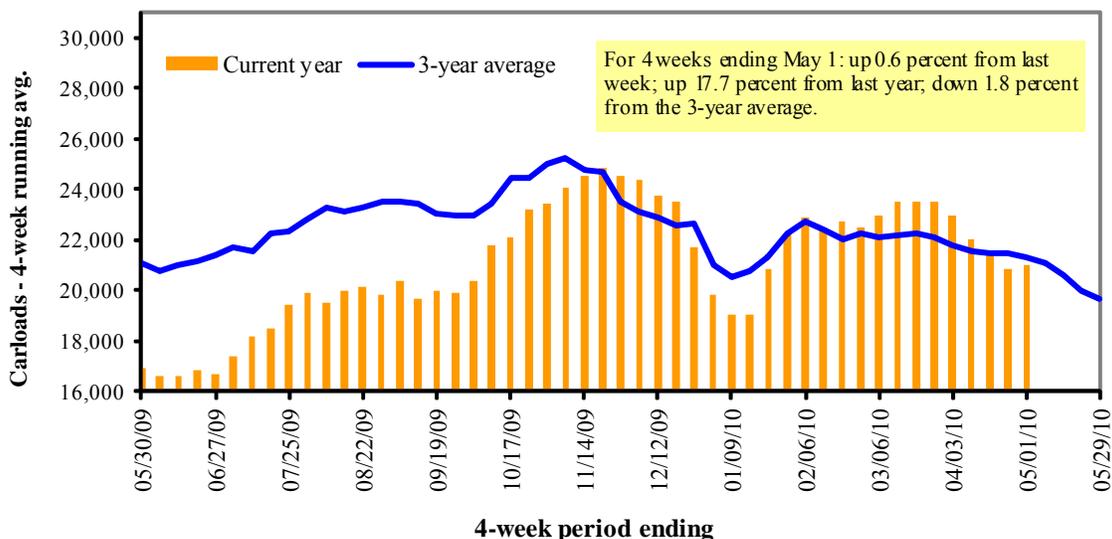
**Class I Rail Carrier Grain Car Bulletin (grain carloads originated)**

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
05/01/10	2,613	3,149	10,592	698	5,240	22,292	4,016	5,754
This week last year	2,170	2,524	8,163	598	4,332	17,787	3,914	5,207
2010 YTD	39,333	52,128	181,264	12,954	93,010	378,689	69,302	91,671
2009 YTD	39,331	43,007	151,133	11,904	81,020	326,395	71,135	91,575
2010 YTD as % of 2009 YTD	100	121	120	109	115	116	97	100
Last 4 weeks as % of 2009 <sup>1</sup>	101	125	120	106	119	118	104	111
Last 4 weeks as % of 3-yr avg. <sup>1</sup>	77	105	104	102	94	98	90	117
Total 2009	105,278	142,254	483,618	36,912	268,811	2,036,873	270,871	8,997

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

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

Figure 3

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

Source: Association of American Railroads

Table 5

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

Week ending	Delivery period							
	May-10	May-09	Jun-10	Jun-09	Jul-10	Jul-09	Aug-10	Aug-09
BNSF <sup>3</sup>								
COT grain units	0	no offer	no bids	no bids	0	no bids	0	no bids
COT grain single-car <sup>5</sup>	0..26	no offer	0..7	no bids	0..7	0	0..7	0
UP <sup>4</sup>								
GCAS/Region 1	no bids	no bids	no bids	no bids	no bids	no bids	n/a	no offer
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	n/a	no offer

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

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

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

<sup>4</sup>UP - GCAS = Grain Car Allocation System

Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

Region 2 includes: CO, IA, KS, MN, NE, WY, and Kansas City and St. Joseph, MO.

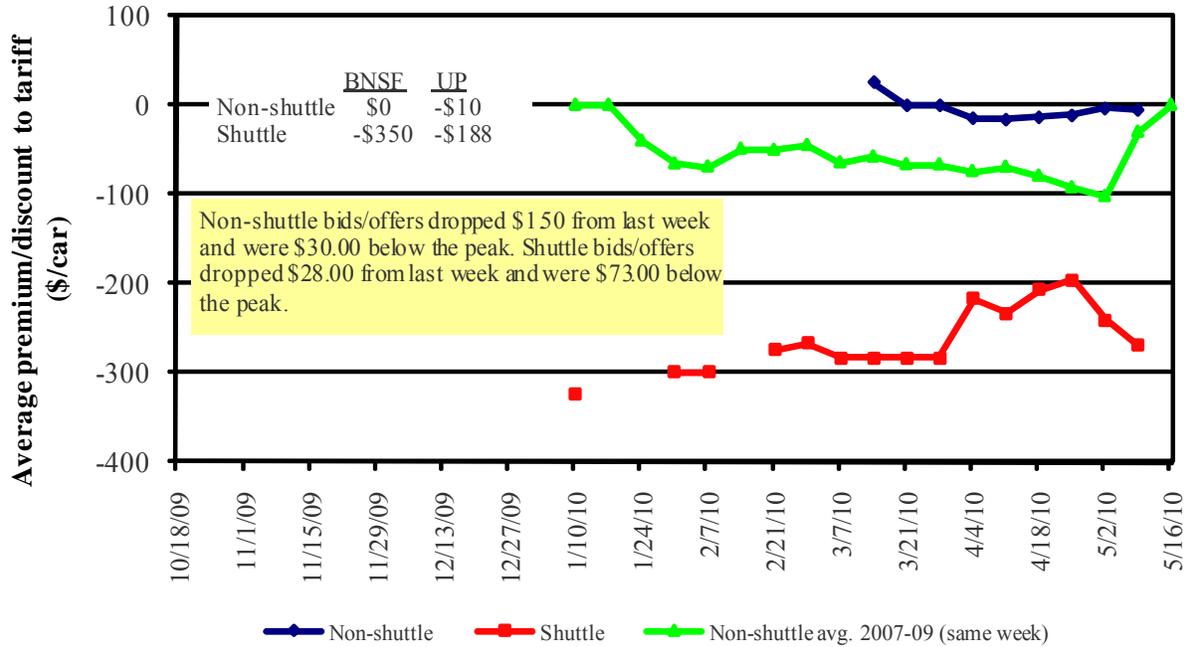
<sup>5</sup>Range is shown because average is not available. Not available = n/a.

Source: Transportation & Marketing Programs/AMS/USDA.

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 May 2010, Secondary Market**

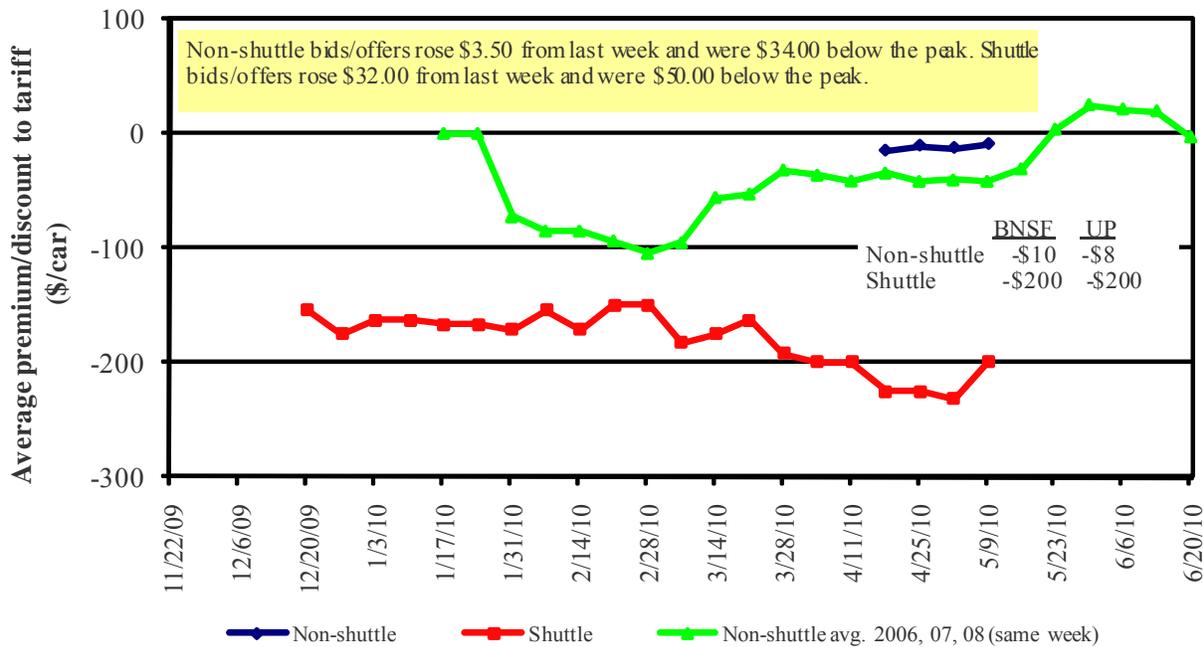


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

**Bids/Offers for Railcars to be Delivered in June 2010, Secondary Market**

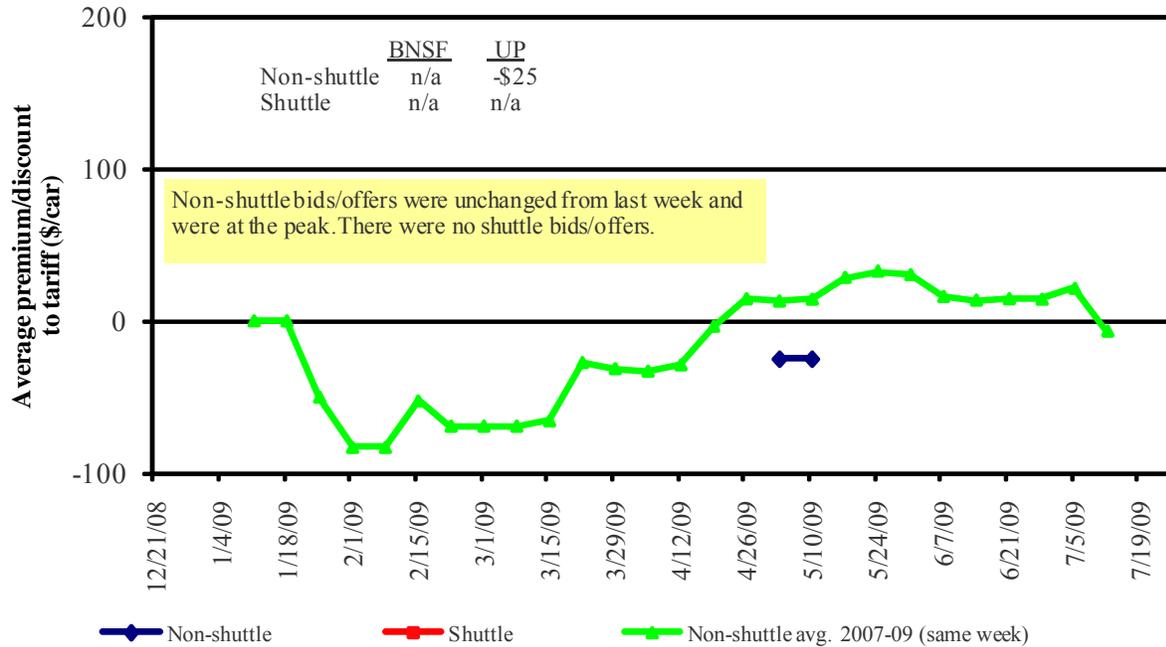


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

## Bids/Offers for Railcars to be Delivered in July 2010, 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					
	May-10	Jun-10	Jul-10	Aug-10	Sep-10	Oct-10
<b>5/8/2010</b>						
<b>Non-shuttle</b>						
BNSF-GF	0	-10	n/a	n/a	n/a	n/a
Change from last week	-1	2	n/a	n/a	n/a	n/a
Change from same week 2009	50	8	n/a	n/a	n/a	n/a
UP-Pool	-10	-8	-25	n/a	n/a	n/a
Change from last week	-2	5	0	n/a	n/a	n/a
Change from same week 2009	-5	0	-75	n/a	n/a	n/a
<b>Shuttle<sup>2</sup></b>						
BNSF-GF	-350	-200	n/a	n/a	250	n/a
Change from last week	-18	32	n/a	n/a	n/a	n/a
Change from same week 2009	-100	-22	n/a	n/a	154	n/a
UP-Pool	-188	-200	n/a	n/a	n/a	n/a
Change from last week	-38	n/a	n/a	n/a	n/a	n/a
Change from same week 2009	112	113	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
5/1/2010	Origin region	Destination region	rate/car	surcharge per car	metric ton	bushel <sup>2</sup>	change Y/Y <sup>3</sup>
<b>Unit train<sup>1</sup></b>							
Wheat	Chicago, IL	Albany, NY	\$2,622	\$148	\$30.53	\$0.83	10
	Kansas City, MO	Galveston, TX	\$2,753	\$140	\$31.89	\$0.87	14
	South Central, KS	Galveston, TX	\$3,655	\$295	\$43.54	\$1.19	11
	Minneapolis, MN	Houston, TX	\$3,799	\$597	\$48.46	\$1.32	14
	St. Louis, MO	Houston, TX	\$3,565	\$136	\$40.80	\$1.11	12
	South Central, ND	Houston, TX	\$5,478	\$664	\$67.70	\$1.84	9
	Minneapolis, MN	Portland, OR	\$4,200	\$726	\$54.30	\$1.48	14
	South Central, ND	Portland, OR	\$4,200	\$596	\$52.87	\$1.44	13
	Northwest, KS	Portland, OR	\$5,100	\$794	\$64.97	\$1.77	9
	Chicago, IL	Richmond, VA	\$2,834	\$201	\$33.46	\$0.91	18
Corn	Chicago, IL	Baton Rouge, LA	\$2,925	\$172	\$34.14	\$0.87	-1
	Council Bluffs, IA	Baton Rouge, LA	\$3,020	\$184	\$35.31	\$0.90	-1
	Kansas City, MO	Dalhart, TX	\$3,284	\$215	\$38.57	\$0.98	3
	Minneapolis, MN	Portland, OR	\$3,609	\$726	\$47.78	\$1.21	9
	Evansville, IN	Raleigh, NC	\$3,204	\$197	\$37.49	\$0.95	12
	Columbus, OH	Raleigh, NC	\$3,093	\$172	\$35.99	\$0.91	12
	Council Bluffs, IA	Stockton, CA	\$4,900	\$784	\$62.66	\$1.59	-2
Soybeans	Chicago, IL	Baton Rouge, LA	\$3,178	\$172	\$36.93	\$1.01	5
	Council Bluffs, IA	Baton Rouge, LA	\$3,192	\$184	\$37.21	\$1.01	6
	Minneapolis, MN	Portland, OR	\$4,110	\$726	\$53.30	\$1.45	13
	Evansville, IN	Raleigh, NC	\$3,204	\$197	\$37.49	\$1.02	12
	Chicago, IL	Raleigh, NC	\$3,804	\$245	\$44.63	\$1.21	11
<b>Shuttle Train</b>							
Wheat	St. Louis, MO	Houston, TX	\$2,867	\$136	\$33.10	\$0.90	14
	Minneapolis, MN	Portland, OR	\$3,700	\$726	\$48.78	\$1.33	13
Corn	Fremont, NE	Houston, TX	\$2,520	\$439	\$32.62	\$0.83	8
	Minneapolis, MN	Portland, OR	\$3,528	\$726	\$46.89	\$1.19	14
Soybeans	Council Bluffs, IA	Houston, TX	\$2,787	\$425	\$35.41	\$0.96	7
	Minneapolis, MN	Portland, OR	\$3,774	\$726	\$49.60	\$1.35	16

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

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

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

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

Table 8

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

Effective date: 5/3/2010

Commodity	Origin state	Destination region	Tariff rate/car <sup>1</sup>	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>3</sup>
					metric ton	bushel <sup>2</sup>	
Wheat	MT	Chihuahua, CI	\$6,291	\$675	\$71.18	\$1.94	11
	OK	Cuautitlan, EM	\$5,726	\$527	\$63.89	\$1.74	12
	KS	Guadalajara, JA	\$6,196	\$543	\$68.85	\$1.87	12
	TX	Salinas Victoria, NL	\$3,154	\$175	\$34.01	\$0.92	10
Corn	IA	Guadalajara, JA	\$6,670	\$630	\$74.59	\$2.03	10
	SD	Penjamo, GJ	\$6,440	\$884	\$74.83	\$2.03	8
	NE	Queretaro, QA	\$6,130	\$520	\$67.95	\$1.85	5
	SD	Salinas Victoria, NL	\$4,570	\$672	\$53.56	\$1.46	3
	MO	Tlalnepantla, EM	\$5,318	\$506	\$59.51	\$1.62	6
	SD	Torreon, CU	\$5,330	\$740	\$62.02	\$1.69	7
Soybeans	MO	Bojay (Tula), HG	\$6,066	\$542	\$67.52	\$1.84	10
	NE	Guadalajara, JA	\$6,550	\$622	\$73.28	\$1.99	11
	IA	Penjamo (Celaya), GJ	\$6,690	\$878	\$77.33	\$2.10	16
	KS	Torreon, CU	\$5,255	\$411	\$57.89	\$1.57	9
Sorghum	OK	Cuautitlan, EM	\$4,339	\$671	\$51.19	\$1.39	7
	TX	Guadalajara, JA	\$5,350	\$575	\$60.54	\$1.65	16
	NE	Penjamo, GJ	\$6,395	\$570	\$71.16	\$1.93	8
	KS	Queretaro, QA	\$5,398	\$400	\$59.24	\$1.61	4
	NE	Salinas Victoria, NL	\$4,282	\$414	\$47.98	\$1.30	4
	NE	Torreon, CU	\$5,240	\$469	\$58.33	\$1.59	8

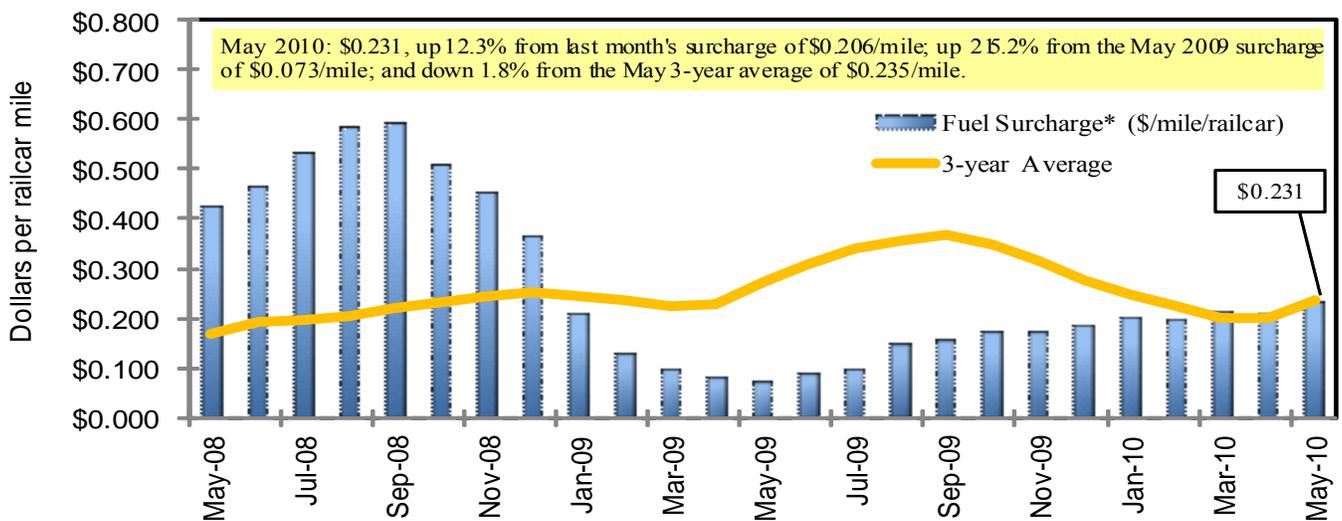
<sup>1</sup>Rates are based upon published tariff rates for high-capacity shuttle trains. Shuttle trains are available for qualified shipments of 75--110 cars that meet railroad efficiency requirements.

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

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

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

Figure 7

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

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

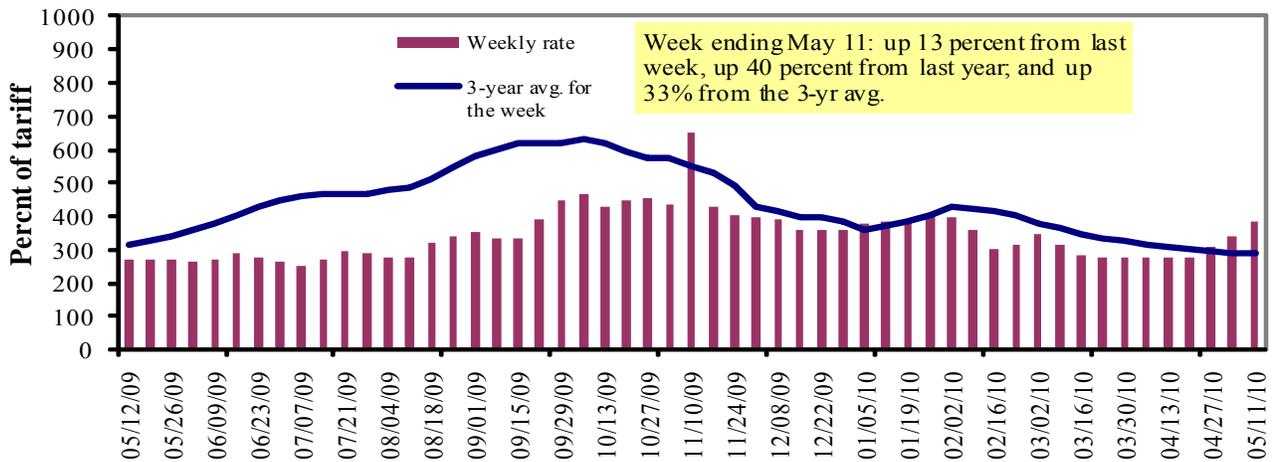
\* Mileage-based fuel surcharges for March and April 2007 are estimated. Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

Sources: www.bnsf.com, www.cn.ca, 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

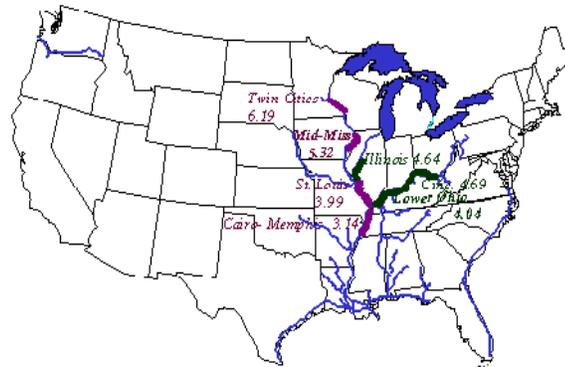
### Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
<b>Rate<sup>1</sup></b>	5/11/2010	421	386	383	274	261	261	234
	5/4/2010	368	342	340	242	235	235	210
<b>\$/ton</b>	5/11/2010	26.06	20.54	17.77	10.93	12.24	10.54	7.35
	5/4/2010	22.78	18.19	15.78	9.66	11.02	9.49	6.59
<b>Current week % change from the same week:</b>								
	Last year	30	39	40	37	24	24	29
	3-year avg. <sup>2</sup>	16	21	33	23	8	8	15
<b>Rate<sup>1</sup></b>	June	415	375	374	278	279	279	260
	August	438	411	411	363	403	403	358

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

Source: Transportation & Marketing Programs/AMS/USDA

Figure 9  
Benchmark tariff rates



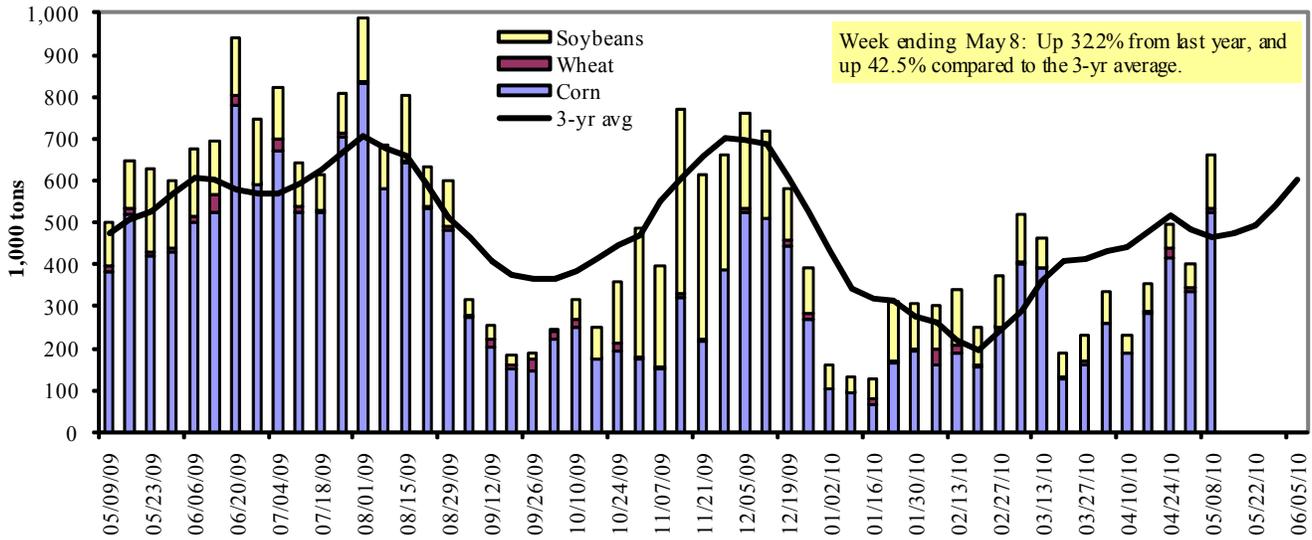
### Calculating barge rate per ton:

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

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

Figure 10

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



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

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

Table 10

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

Week ending 5/8/2010	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	259	6	64	3	332
Winfield, MO (L25)	263	5	109	2	379
Alton, IL (L26)	486	8	125	9	628
Granite City, IL (L27)	525	8	128	11	671
<b>Illinois River (L8)</b>	204	3	17	8	232
<b>Ohio River (L52)</b>	118	7	32	0	157
<b>Arkansas River (L1)</b>	0	14	10	3	27
Weekly total - 2010	644	29	169	13	855
Weekly total - 2009	445	28	128	10	612
2010 YTD <sup>1</sup>	6,933	380	3,495	162	10,969
2009 YTD	7,513	440	3,401	158	11,513
2010 as % of 2009 YTD	92	86	103	102	95
Last 4 weeks as % of 2009 <sup>2</sup>	100	72	66	64	90
Total 2009	23,424	1,501	10,465	430	35,819

<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.

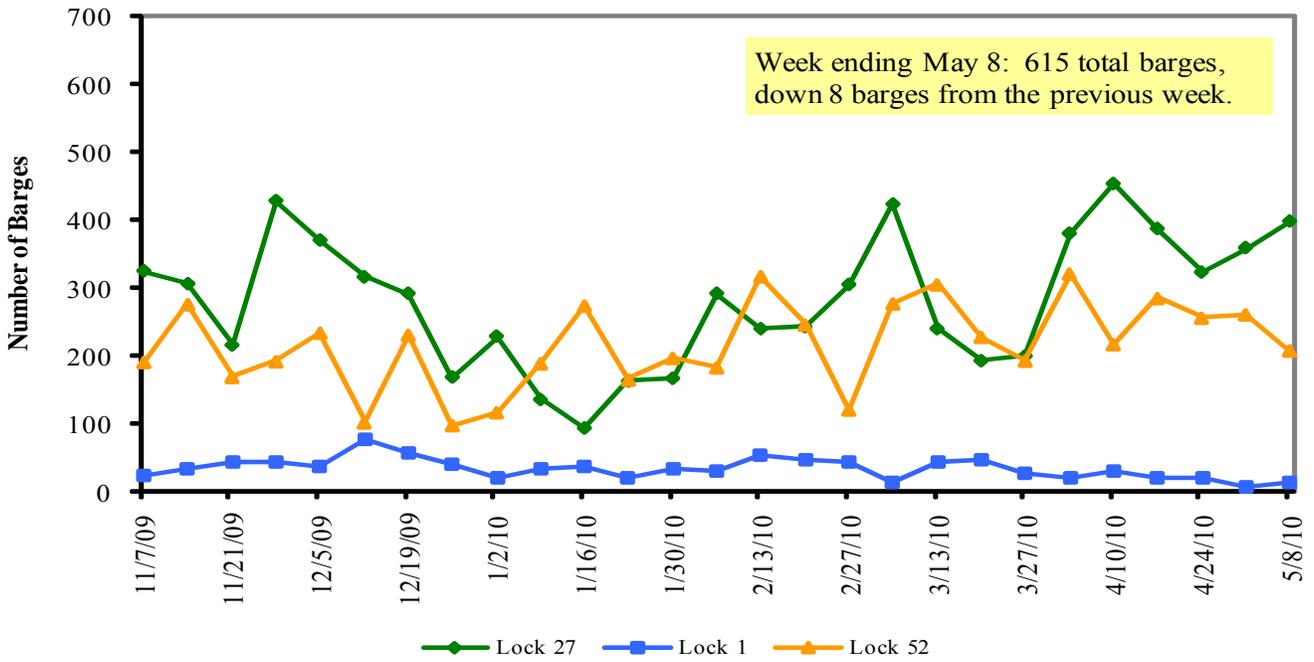
<sup>2</sup> As a percent of same period in 2009.

Note: Total may not add exactly, due to rounding

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

Figure 11

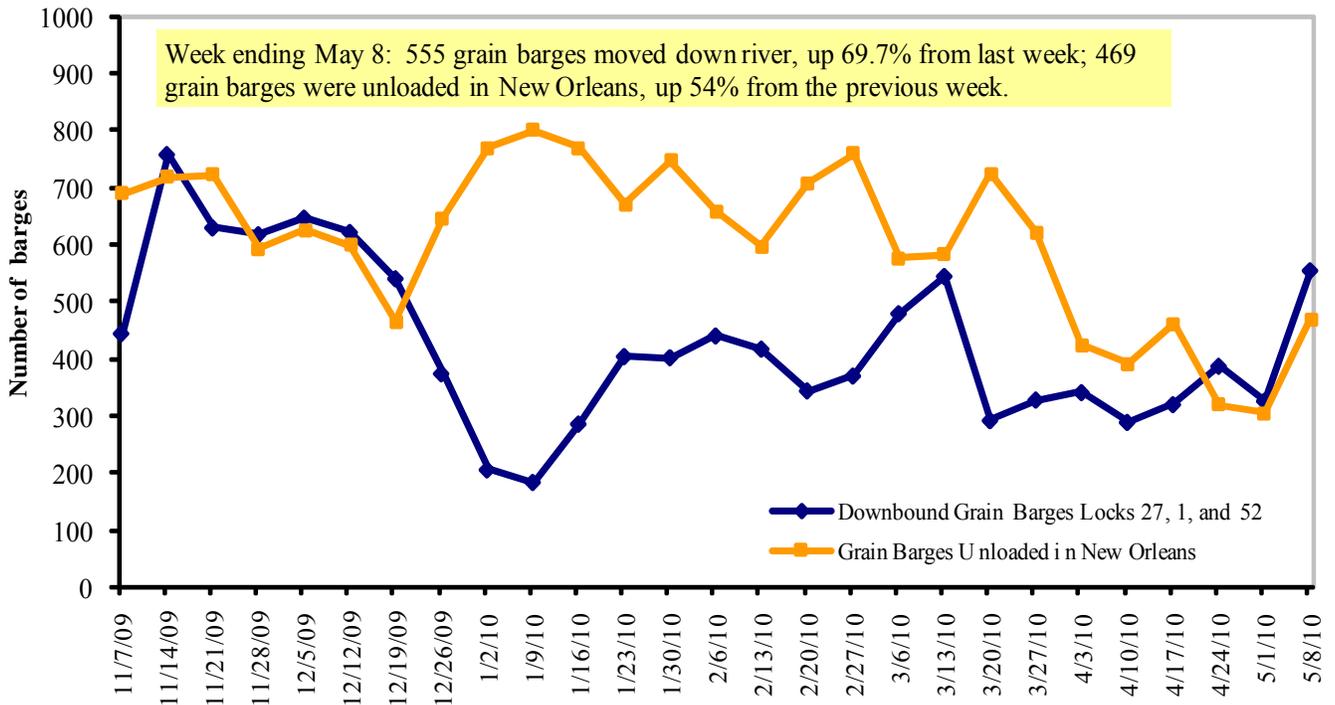
**Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52**



Source: U.S. Army Corps of Engineers

Figure 12

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



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

# Truck Transportation

The **weekly diesel price** provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 11

## Retail on-Highway Diesel Prices<sup>1</sup>, Week Ending 5/10/2010 (US\$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.136	0.009	0.881
	New England	3.161	0.023	0.766
	Central Atlantic	3.246	0.008	0.860
	Lower Atlantic	3.087	0.008	0.901
II	Midwest <sup>2</sup>	3.102	0.006	0.946
III	Gulf Coast <sup>3</sup>	3.087	0.004	0.889
IV	Rocky Mountain	3.169	0.003	0.899
V	West Coast	3.233	-0.010	0.904
	California	3.269	0.009	0.932
Total	U.S.	3.127	0.005	0.911

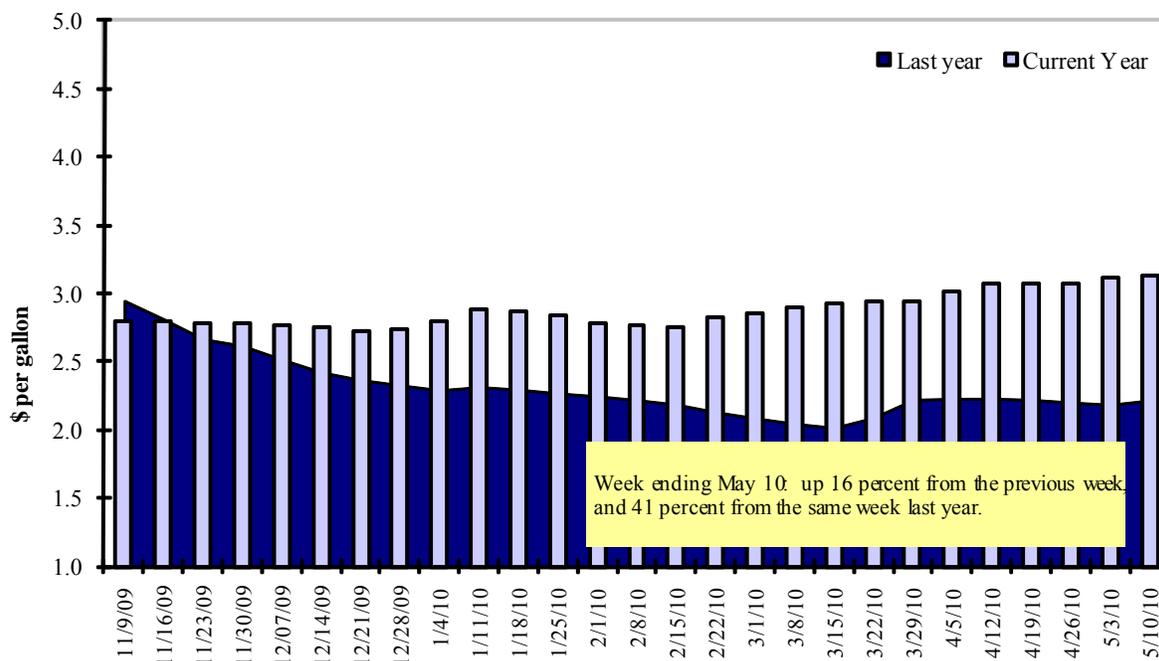
<sup>1</sup>Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

<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)

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>									
4/29/2010	910	258	683	406	93	2,348	11,338	1,874	15,560
This week year ago	693	275	613	552	29	2,161	10,052	4,851	17,064
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2009/10 YTD	7,651	2,610	4,906	3,605	903	19,675	30,084	35,560	85,319
2008/09 YTD	10,775	4,872	5,029	3,059	420	24,155	27,876	27,593	79,624
YTD 2009/10 as % of 2008/09	71	54	98	118	215	81	108	129	107
Last 4 wks as % of same period 2008/09	140	114	137	89	352	126	103	41	88
2008/09 Total	11,244	5,100	5,408	3,420	454	25,626	44,650	33,705	103,981
2007/08 Total	13,709	5,568	7,842	4,191	1,075	32,385	59,666	30,411	122,462

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

<sup>2</sup> Shipped export sales to date; new marketing year is now in effect for 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 Importers<sup>1</sup> of U.S. Corn

Week ending 04/29/10	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup>  2008/09
	2010/11	2009/10	2008/09		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	27	11,856	12,627	(6)	15,910
Mexico	646	7,447	6,379	17	7,454
Korea	55	6,842	4,349	57	5,129
Taiwan	0	2,710	2,600	4	3,198
Egypt	55	1,912	1,426	34	2,233
<b>Top 5 importers</b>	<b>783</b>	<b>30,766</b>	<b>27,381</b>	<b>12</b>	<b>33,924</b>
<b>Total US corn export sales</b>	<b>914</b>	<b>41,422</b>	<b>37,928</b>	<b>9</b>	<b>45,214</b>
% of Projected		84%	80%		
Change from Last Week	30	1,831	589		
<b>Top 5 importers' share of U.S. corn export sales</b>	86%	74%	72%		
<b>USDA forecast, May 2010</b>	<b>50,800</b>	<b>49,530</b>	<b>47,180</b>	<b>5</b>	
<b>Corn Use for Ethanol USDA forecast, Ethanol May 2010</b>	<b>116,840</b>	<b>111,760</b>	<b>93,396</b>	<b>20</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 04/29/10	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2008/09
	2009/10	2008/09			
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
China	2,558	21,940	18,198	21	18,681
Mexico	40	2,721	2,606	4	3,098
Japan 5	1	2,151	2,290	(6)	2,410
EU-25	0	2,697	2,214	22	2,180
Taiwan	0	1,408	1,395	1	1,592
<b>Top 5 importers</b>	<b>2,649</b>	<b>30,917</b>	<b>26,702</b>	<b>16</b>	<b>27,961</b>
<b>Total US soybean export sales</b>	<b>3,202</b>	<b>37,433</b>	<b>32,444</b>	<b>15</b>	
% of Projected	9%	95%	93%		
Change from last week	209	283	654		
<b>Top 5 importers' share of U.S.</b>					
<b>soybean export sales</b>	83%	83%	82%		
<b>USDA forecast, May 2010</b>	<b>36,740</b>	<b>39,600</b>	<b>34,930</b>	<b>13</b>	
<b>Soybean Use for Biodiesel USDA</b>					
<b>forecast, May 2010</b>	<b>6,954</b>	<b>5,275</b>	<b>4,566</b>	<b>16</b>	

(n) indicates negative number.

<sup>1</sup>Based on FAS 2006/07 Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.<sup>2</sup>Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.<sup>3</sup>FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi\_rpt.htm.

Table 15

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

Week Ending 04/29/2010	Total Commitments <sup>2</sup>			% change current MY from last MY	Exports <sup>3</sup> 2008/09
	2010/11	2009/10	2008/09		
	Next MY	Current MY	Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	134	3,265	3,161	3	3,103
Nigeria	391	3,403	2,680	27	2,661
Mexico	198	1,927	2,453	(21)	2,423
Egypt 0		456	1,928	(76)	1,928
Philippines	476	1,568	1,531	2	1,480
Iraq	0	307	1,205	(75)	1,205
Korea, South	124	1,202	1,143	5	1,127
Brazil	0	214	773	(72)	789
Colombia	75	547	782	(30)	749
Taiwan	18	856	715	20	714
<b>Top 10 importers</b>	<b>1,415</b>	<b>13,744</b>	<b>16,372</b>	<b>(16)</b>	<b>16,179</b>
<b>Total US wheat export sales</b>	<b>1,995</b>	<b>22,023</b>	<b>26,316</b>	<b>(16)</b>	<b>27,640</b>
% of Projected	8%	85%	95%		
Change from last week	134	150	255		
<b>Top 10 importers' share of U.S.</b>					
<b>wheat export sales</b>	71%	62%	62%		
<b>USDA forecast, May 2010</b>	<b>24,490</b>	<b>25,840</b>	<b>27,640</b>	<b>(7)</b>	

(n) indicates negative number.

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

Table 16

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

Port regions	Week ending 05/06/10	2010 YTD <sup>1</sup>	2009 YTD <sup>1</sup>	2010 YTD as % of 2009 YTD	Last 4-weeks as % of		Total <sup>1</sup> 2009
					2009	3-yr. avg.	
<b>Pacific Northwest</b>							
Wheat	329	3,729	3,359	111	144	119	10,091
Corn	178	3,237	2,785	116	95	85	8,498
Soybeans	39	4,224	3,570	118	72	67	9,743
<b>Total</b>	<b>545</b>	<b>11,190</b>	<b>9,713</b>	<b>115</b>	<b>105</b>	<b>93</b>	<b>28,332</b>
<b>Mississippi Gulf</b>							
Wheat	81	1,366	1,510	90	111	88	4,019
Corn	516	9,730	10,405	94	81	89	28,843
Soybeans	78	8,015	8,044	100	49	63	21,831
<b>Total</b>	<b>675</b>	<b>19,112</b>	<b>19,958</b>	<b>96</b>	<b>75</b>	<b>83</b>	<b>54,693</b>
<b>Texas Gulf</b>							
Wheat	156	2,713	1,806	150	135	79	5,735
Corn	0	778	677	115	103	133	1,968
Soybeans	0	667	472	141	n/a	232	2,402
<b>Total</b>	<b>156</b>	<b>4,158</b>	<b>2,955</b>	<b>141</b>	<b>129</b>	<b>90</b>	<b>10,105</b>
<b>Great Lakes</b>							
Wheat	0	154	78	198	114	89	990
Corn	0	16	26	60	n/a	59	353
Soybeans	0	0	19	0	0	0	781
<b>Total</b>	<b>0</b>	<b>169</b>	<b>122</b>	<b>139</b>	<b>108</b>	<b>77</b>	<b>2,124</b>
<b>Atlantic</b>							
Wheat	0	72	190	38	13	5	552
Corn	0	123	47	263	173	133	472
Soybeans	0	592	360	164	49	32	1,268
<b>Total</b>	<b>1</b>	<b>786</b>	<b>597</b>	<b>132</b>	<b>59</b>	<b>31</b>	<b>2,292</b>
<b>U.S. total from ports<sup>2</sup></b>							
Wheat	566	8,034	6,941	116	131	96	21,387
Corn	694	13,883	13,939	100	86	89	40,134
Soybeans	117	13,499	12,464	108	57	64	36,025
<b>Total</b>	<b>1,377</b>	<b>35,415</b>	<b>33,345</b>	<b>106</b>	<b>89</b>	<b>86</b>	<b>97,546</b>

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

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

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

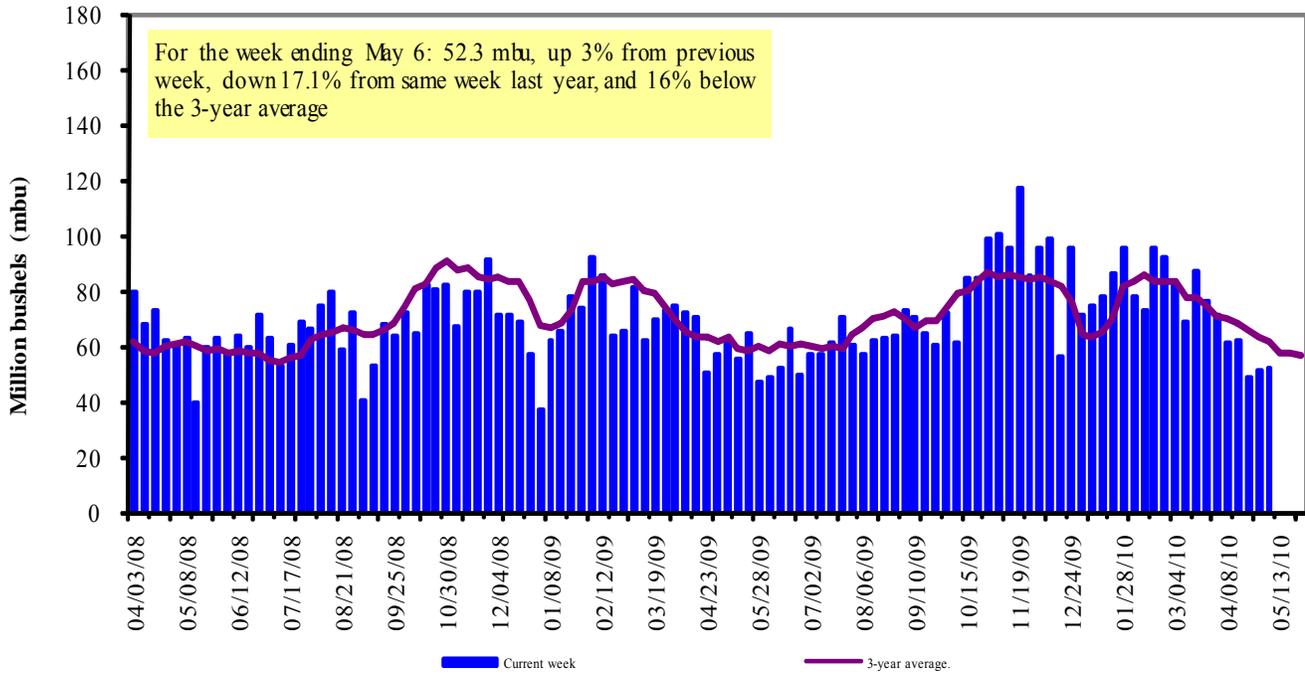
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The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 35 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 62 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2009.

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Figure 14

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

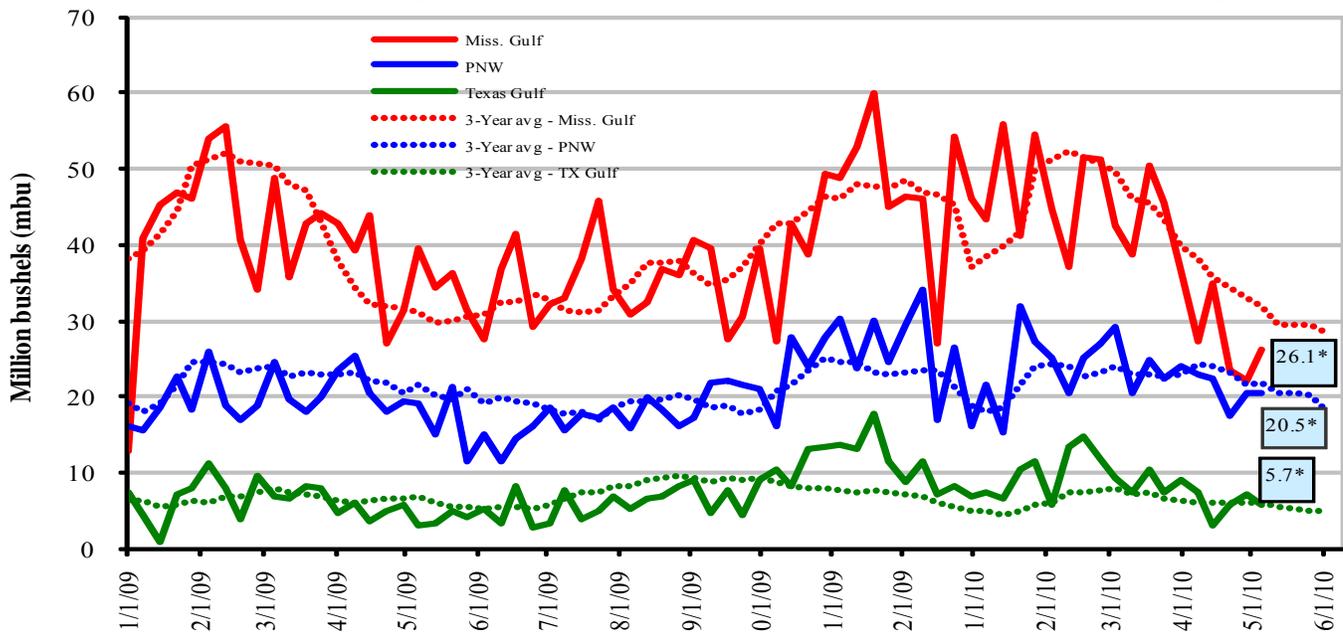


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

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

<b>May 6, % change from:</b>	<b>MS Gulf</b>	<b>TX Gulf</b>	<b>U.S. Gulf</b>	<b>PNW</b>
Last week	up 17	down 19	up 9	down 0.5
Last year (same week)	down 34	up 91	down 25	up 7
3-yr avg. (4-wk mov. avg.)	down 18.	down 5	down 16	down 16

# Ocean Transportation

Table 17

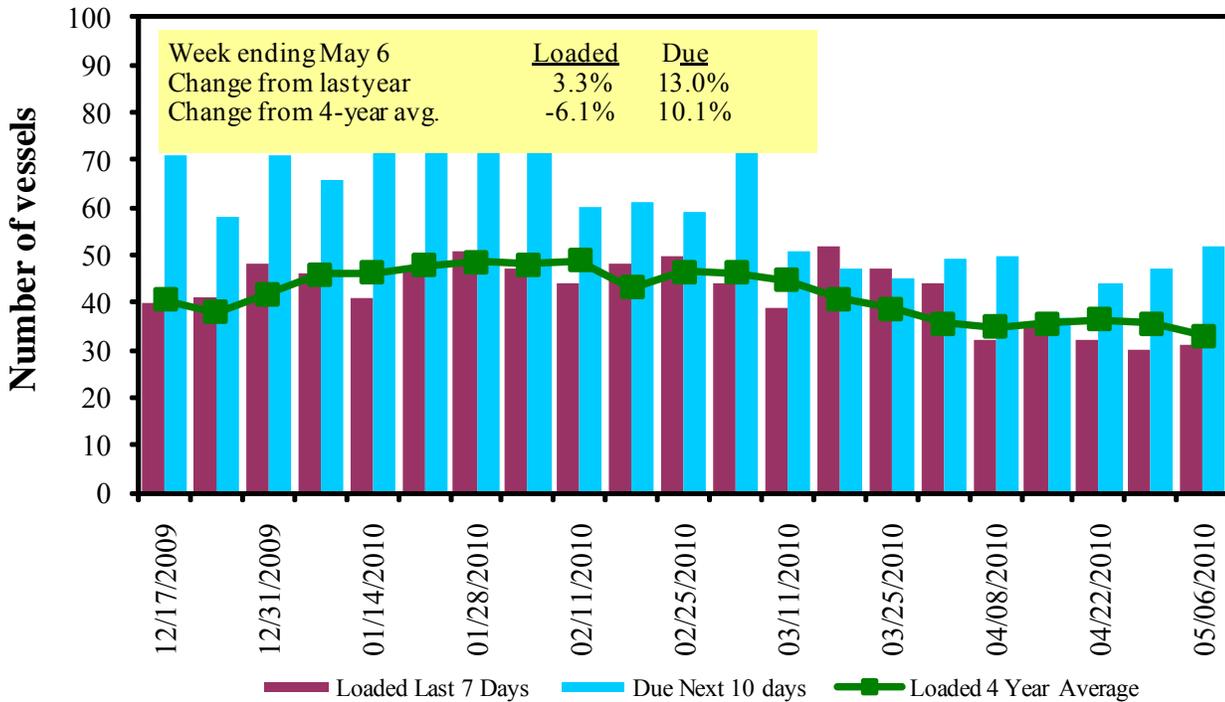
**Weekly Port Region Grain Ocean Vessel Activity (number of vessels)**

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
5/6/2010	25	31	52	8	9
4/29/2010	20	30	47	9	9
2009 range	(18..72)	(21..57)	(37..86)	(2..19)	(3..19)
2009 avg.	37	39	55	10	9

Source: Transportation & Marketing Programs/AMS/USDA

**Figure 16**

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

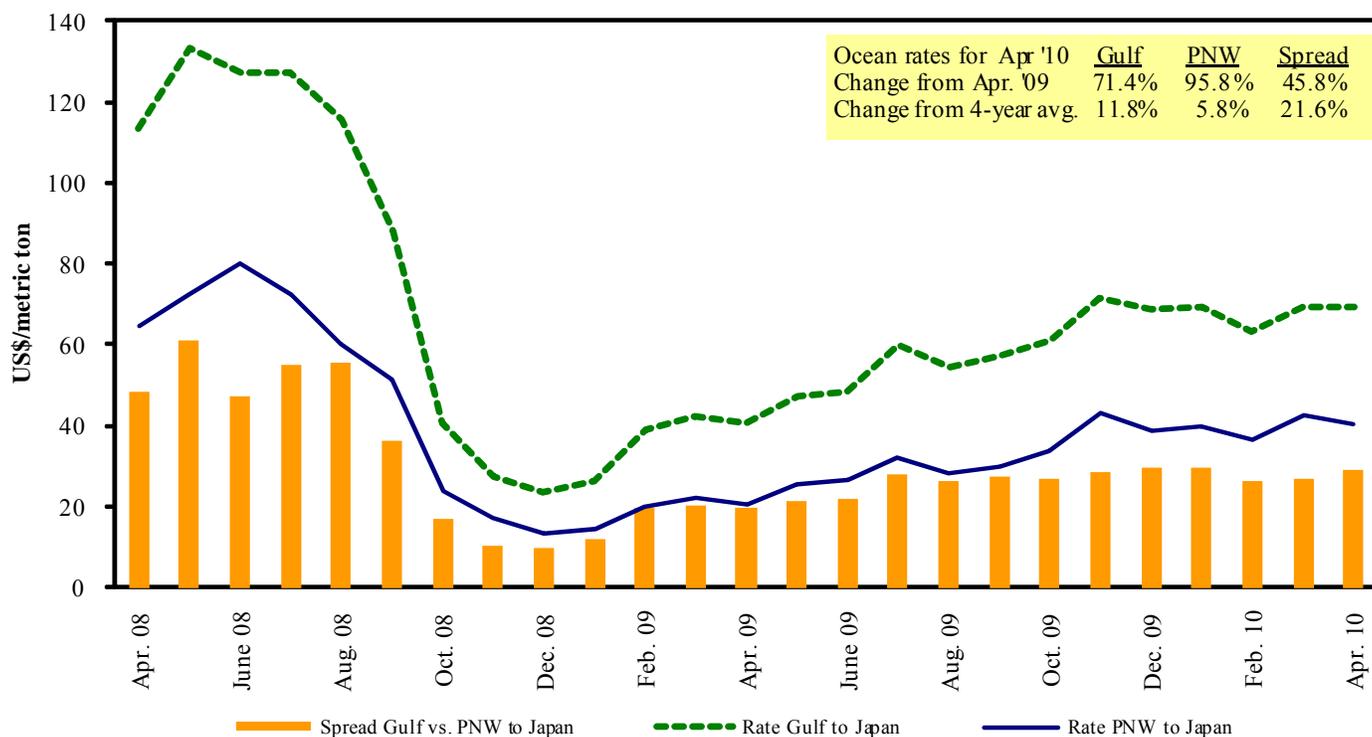


Source: Transportation & Marketing Programs/AMS/USDA

<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

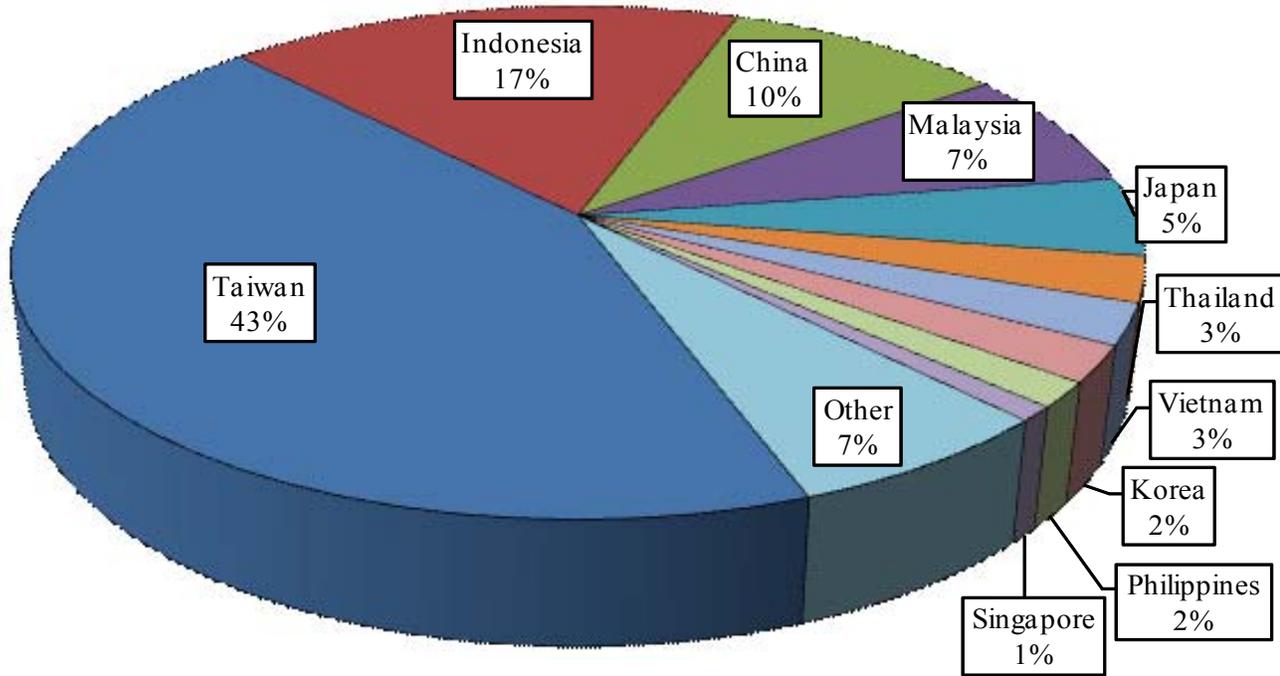
### Ocean Freight Rates For Selected Shipments, Week Ending 5/8/2010

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Hvy Grain	Nov	55000	61.00
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Apr 5/15	23,000	134.65
U.S. Atlantic	Poland	Soybeans	Mar 9/15	24,000	50.00
U.S. Gulf	Morocco	Wheat	Mar 15/25	30,000	46.00
U.S. Gulf	Morocco	Wheat	Feb 25/28	30,000	41.00
U.S. Gulf	Morocco	Wheat	Feb 8/10	25,000	46.00
U.S. Gulf	Egyptian Mediterranean	Hvy Grain	Jan 7/12	60,000	39.00
U.S. Gulf	Djibouti <sup>1</sup>	Wheat	Jan 1/10	2,770	114.50
St. Lawrence	Morocco	Wheat	Apr 27/ May 5	21,000	38.75
Ukraine	Kenya	Wheat	Dec 25/30	25,000	52.00
Ukraine	Mediterranean	Wheat	Dec 14/18	30,000	20.00
France	Algeria	Wheat	May 10/20	25,000	26.75
France	Algeria	Hvy Grain	Jan 15/20	28,500	28.25
France	Algeria	Wheat	Apr 5/15	25,000	25.50
River Plate	Continent	Grain	Dec 20/28	25,000	36.50
River Plate	Continent	Grain	Dec 1/10	25,000	48.00
River Plate	Continent	Grain	Nov 25/30	25,000	40.00

In 2009, containers were used to transport 5 percent of total waterborne grain exports, and 6 percent of U.S. grain exports to Asia.

Figure 18

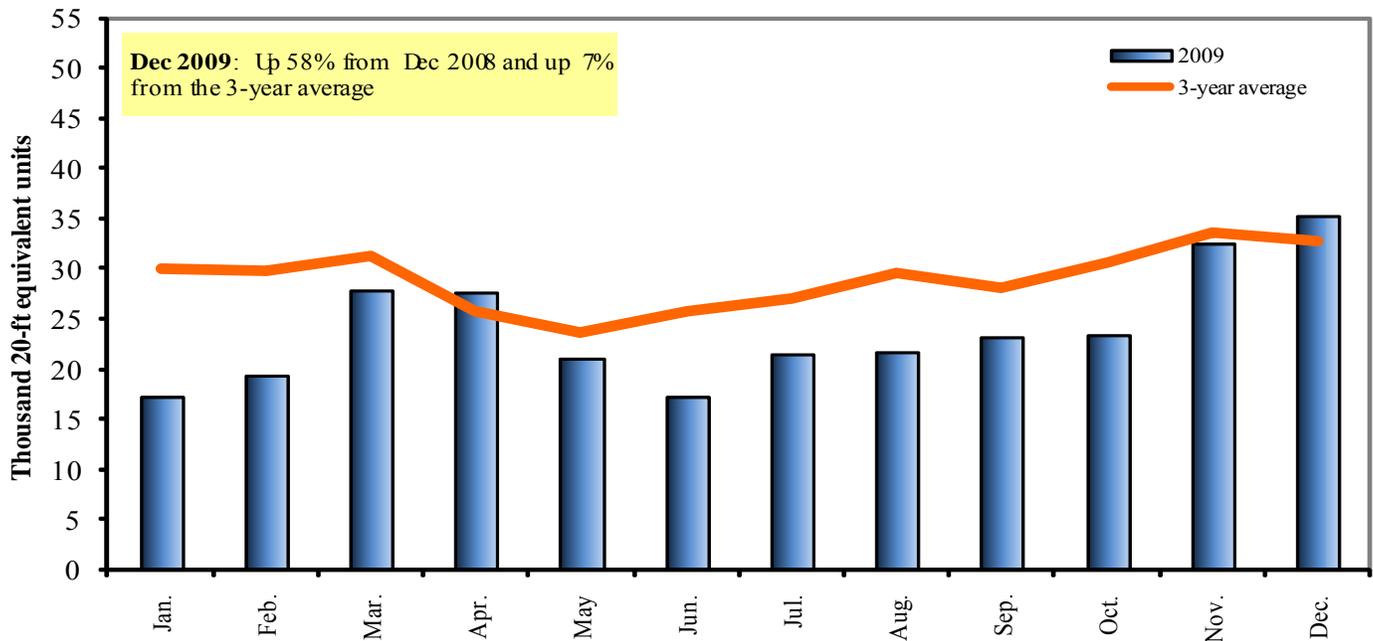
**Top 10 Destination Markets for U.S. Containerized Grain Exports, December 2009**



Source: Port Import Export Reporting Service (PIERS)

Figure 19

**Monthly Shipments of Containerized Grain to Asia**



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

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