USDA
Agricultural Marketing Service

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

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March 1, 2012

Contents

The next release is Mar. 8, 2012

WEEKLY HIGHLIGHTS

U.S. Grains Council and Panama Canal Authority Sign MOU

At the 9th International Marketing Conference and 52nd Annual Membership Meeting of U.S. Grains Council held in Panama City, Panama, February 13–15, 2012, the Council signed a Memorandum of Understanding with the Panama Canal Authority to promote cooperation in sharing of studies and market-related information between the parties. It will also allow the organizations to project the future demand of U.S. grain exports and grain shipments through the Panama Canal. The agreement will last for five years and is renewable upon mutual agreement. Panama Canal is an important route for U.S. grain shipments destined to Asia.

Total Grain Inspections Lowest Since January

For the week ending February 23, **total inspections of grain** (corn, wheat, and soybeans) for export reached 1.92 million metric tons (mmt), down 23 percent from the past week and 24 percent below last year. Grain inspections were the lowest since January 5 (1.32 mmt). Inspections were down in the Mississippi Gulf area due in part to the Mardi Gras celebration and Presidents' Day Federal holiday. Although corn inspections (.688 mmt) were down 22 percent from the past week, the average for the last four weeks was 11 percent above the same time last year and 1 percent above the three year average. Wheat inspections (.255 mmt) dropped 58 percent as shipments to Nigeria and Asia receded. Soybean inspections were unchanged from the previous week.

Portions of Upper Mississippi River Reopen After Lock Repairs; Delays Still Expected at Other Locations

Mississippi River Lock 16 (Mustcatine, IL), Lock 17 (New Boston, IL), and Lock 18 (Gladstone, IL) will reopen on March 3 after being closed for repairs since January. Lock 25 (Winfield, MO) has been closed since February 22 and is scheduled to reopen on March 6 for 24 hours to allow any backlog of traffic to transit the lock. Lock 25 will then shut down on March 8 to continue repair work and reopen March 15. During the last closure, Lock 25 will reopen several times to permit barge passage. Lock 25 is a single chamber facility and the closure causes an impasse at that point on the river. The main chamber at Locks 27 (Granite City, IL) is closed until March 15 but traffic is allowed through the second, smaller, auxiliary lock. Delays can be expected at the auxiliary lock.

Snapshots by Sector

Rail

U.S. railroads originated 21,688 **carloads of grain** during the week ending February 18, up 2 percent from last week, down 7 percent from last year, and 3 percent lower than the 3-year average.

During the week ending February 23, average March non-shuttle **secondary railcar bids/offers per car** were at tariff, down $6.50 from last week and $175 lower than last year. Average shuttle rates were $161.50 below tariff, up $74 from last week but $303 lower than last year.

Ocean

During the week ending February 23, 34 **ocean-going grain vessels** were loaded in the Gulf, down 23 percent from last year. Forty-six vessels are expected to be loaded within the next 10 days, 35 percent less than the same period last year.

During the week ending February 24, the **ocean freight rate** for shipping bulk grain from the Gulf to Japan was $49 per mt, down 2 percent from the previous week. The cost of shipping from the Pacific Northwest to Japan was $29 per mt—unchanged from the previous week.

Barge

During the week ending February 27, **barge grain movements** totaled 513,713 tons, 24.6 percent lower than the previous week and 11 percent lower than the same period last year.

During the week ending February 27, 321 grain barges **moved down river**, down 24.6 percent from last week; 563 grain barges were **unloaded in New Orleans**, down 6.3 percent from the previous week

Fuel

During the week ending February 27, U.S. average **diesel fuel prices** increased to $4.05 per gallon—9 cents higher than the previous week and 34 cents higher than the same week last year.

Feature Article/Calendar

Soybean Transportation Costs Fell in Brazil and Pacific Northwest

During the 4th quarter, 2011, transportation costs of shipping soybeans from Brazil and the Pacific Northwest (PNW) to China decreased from the 3rd quarter. The cost of shipping soybeans from Minneapolis, MN, to Hamburg, Germany, through the Gulf remained relatively stable; the cost of shipping from Davenport, IA, to the same destination increased by 2 percent (table 1). The costs of shipping from both locations to Shanghai, China, increased by 3 and 4 percent, respectively, from the previous quarter (table 2). However, the costs of transporting from Fargo, ND, and Sioux Falls, SD, through the PNW ports decreased by 1 percent during the quarter (table 2). The costs of shipping from North Mato Grosso (MT) and South Goiás to Hamburg decreased by 11 and 16 percent (table1), while the cost of shipping from the same locations to Shanghai decreased by 9 and 12 percent, respectively, from the previous quarter (table 2).

Table 1-Quarterly costs of transporting soybeans from U.S. and Brazil to Hamburg, Germany

	2010 4th qtr.	2011 3rd qtr.	2011 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2010 4th qtr.	2011 3rd qtr.	2011 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
United States (via U.S. Gulf)										
	Minneapolis, MN --$/mt--					**Davenport, IA** --$/mt--				
Truck	8.94	12.62	10.22	14.32	-19.02	8.94	12.62	10.22	14.32	-19.02
Barge	41.82	33.78	35.28	-15.64	4.44	31.85	26.39	28.91	-9.23	9.55
Ocean[1]	24.84	23.94	25.08	0.97	4.76	24.84	23.94	25.08	0.97	4.76
Total transportation[2]	75.60	70.34	70.58	-6.64	0.34	65.63	62.95	64.21	-2.16	2.00
Farm Value[3]	385.69	461.75	418.88	8.61	-9.28	399.16	478.89	425.00	6.47	-11.25
Landed Cost	461.29	532.09	489.46	6.11	-8.01	464.79	541.84	489.21	5.25	-9.71
Transport % of landed cost	16.39	13.22	14.42			14.12	11.62	13.13		
Brazil										
	North MT[4] - Santos[5] --$/mt--					**South GO[4] - Paranagua[5]** --$/mt--				
Truck	120.12	127.77	115.05	-4.22	-9.96	64.38	65.25	54.06	-16.03	-17.15
Ocean[6]	31.67	36.65	32.00	1.04	-12.69	33.50	37.29	32.63	-2.60	-12.50
Total transportation[2]	151.79	164.42	147.05	-3.12	-10.56	97.88	102.54	86.69	-11.43	-15.46
Farm Value [7]	413.46	416.62	358.24	-13.36	-14.01	400.62	417.65	379.70	-5.22	-9.09
Landed Cost	565.25	581.04	505.29	-10.61	-13.04	498.50	520.19	466.39	-6.44	-10.34
Transport % of landed cost	26.85	28.30	29.10			19.63	19.71	18.59		

[1]Source: O'Neil Commodity Consulting
[3]Source: USDA/NASS
[4]Producing regions: MT= Mato Grosso, GO = Goiás
[5]Export ports
[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS
[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br, 2010 value for North MT has been revised
Note: Total may not add exactly due to rounding

U.S. transportation costs through the Gulf were pushed up by increases in barge and ocean rates during the quarter. Barge rates rose on an anticipated increase in seasonal barge movements during the 4th quarter. Ocean rates increased because of a slight improvement in global economy, which pushed up the demand for bulk shipments in some parts of the world during the quarter. Rail tariff rates also increased in the United States during the quarter, but increases in ocean and rail rates were not enough to offset the decrease in truck rates, causing the total transportation cost to decline in the PNW. The costs of shipping soybeans from Brazil fell notably during the quarter because of decreases in both truck and ocean rates.

Farm prices in United States and Brazil fell during the 4th quarter, but U.S. farm prices were still higher than last year. Total landed costs of U.S. soybean shipments to Hamburg were a little over $489, and to Shanghai ranged from $509–$520. Brazil's landed costs to Hamburg ranged from $466 to $505, and to Shanghai from $490 to $523. Despite a big drop in Brazil's transportation costs, the transportation share of the landed costs were much higher than those of the United States. U.S. Transportation share of the landed costs to Hamburg ranged from 13 to 14 percent, and to Shanghai ranged from 18 to 19 percent. On the other hand, Brazil's transportation share of landed costs to Hamburg ranged from 19 to 29 percent, and to Shanghai from 22 to 32 percent.

Table 2-Quarterly costs of transporting soybeans from U.S. and Brazil to Shanghai, China

	2010 4th qtr.	2011 3rd qtr.	2011 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.	2010 4th qtr.	2011 3rd qtr.	2011 4th qtr.	Percent change Yr. to Yr.	Percent change Qtr. to Qtr.
	United States (via U.S. Gulf)									
	Minneapolis, MN					**Davenport, IA**				
	--$/mt--					--$/mt--				
Truck	8.94	12.62	10.22	14.32	-19.02	8.94	12.62	10.22	14.32	-19.02
Barge	41.82	33.78	35.28	-15.64	4.44	31.85	26.39	28.91	-9.23	9.55
Ocean[1]	55.46	51.62	55.33	-0.23	7.19	55.46	51.62	55.33	-0.23	7.19
Total transportation[2]	106.22	98.02	100.83	-5.07	2.87	96.25	90.63	94.46	-1.86	4.23
Farm Value[3]	385.69	461.75	418.88	8.61	-9.28	399.16	478.89	425.00	6.47	-11.25
Landed Cost	491.91	559.77	519.71	5.65	-7.16	495.41	569.52	519.46	4.85	-8.79
Transport % of landed cost	21.59	17.51	19.40			19.43	15.91	18.18		
	Via PNW									
	Fargo, ND					**Sioux Falls, SD**				
Truck	8.94	12.62	10.22	14.32	-19.02	8.94	12.62	10.22	14.32	-19.02
Ocean[1]	29.25	29.43	29.79	1.85	1.22	29.25	29.43	29.79	1.85	1.22
Rail	48.99	52.51	54.05	10.33	2.93	50.31	54.29	55.77	10.85	2.73
Total transportation[2]	87.18	94.56	94.06	7.89	-0.53	88.50	96.34	95.78	8.23	-0.58
Farm Value[3]	381.28	456.85	415.20	8.90	-9.12	385.56	456.85	417.65	8.32	-8.58
Landed Cost	468.46	551.41	509.26	8.71	-7.64	474.06	553.19	513.43	8.30	-7.19
Transport % of landed cost	18.61	17.15	18.47			18.67	17.42	18.65		
	Brazil									
	North MT[4] - Santos[5]					**South GO[4] - Paranagua[5]**				
	--$/mt--					--$/mt--				
Truck	120.12	127.77	115.05	-4.22	-9.96	64.38	65.25	54.06	-16.03	-17.15
Ocean[6]	57.79	52.31	49.65	-14.09	-5.09	61.50	59.61	55.80	-9.27	-6.39
Total transportation[2]	177.91	180.08	164.70	-7.43	-8.54	125.88	124.86	109.86	-12.73	-12.01
Farm Value[7]	413.46	416.62	358.24	-13.36	-14.01	400.62	417.65	379.70	-5.22	-9.09
Landed Cost	591.37	596.70	522.94	-11.57	-12.36	526.50	542.51	489.56	-7.02	-9.76
Transport % of landed cost	30.08	30.18	31.50			23.91	23.02	22.44		

[1]Source: O'Neil Commodity Consulting

[3]Source: USDA/NASS

[4]Producing regions: MT= Mato Grosso, GO = Goiás

[5]Export ports

[6]Source: ESALQ/ USP (University of São Paulo, Brazil) and USDA/AMS, 2010 value for North MT has been revised

[7]Source: Companhia Nacional de Abastecimento (CONAB) www.conab.gov.br

Note: Total may not add exactly due to rounding

Market Outlook: During October–December, 2011, China imported a little over 10.6 million metric tons (mmt) of soybeans, at a value of $5.12 billion, from the United States. Although the quantity was below the previous year, it was much more than the previous quarter when only about 1.09 mmt were imported at a value of $5.74 million dollars. Also during October – December, about 0.272 mmt of soybeans were exported by the United States to Europe at a value of $126.8 million. China continues to buy U.S. soybeans as the Chinese trade delegation recently signed agreements with U.S. grain companies to buy 8.2 mmt of soybeans, and possibly as much as 12 mmt. China is turning to the United States for more supplies as South America production is threatened by drought. Moderate or low landed costs could continue to boost Chinese demand for U.S. soybeans. For more on Brazil's soybean exports, see *Brazil Soybean Transportation Indicator*. Surajudeen.olowolayemo@ams.usda.gov

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators[1]

	Truck	Rail[2]	Barge	Ocean	
Week ending				Gulf	Pacific
02/29/12	272	95	213	219	206
02/22/12	266	102	225	224	206

[1]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)

[2]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	2/24/2012	2/17/2012
Corn	IL--Gulf	-0.66	-0.74
Corn	NE--Gulf	-0.82	-0.90
Soybean	IA--Gulf	-1.32	-1.27
HRW	KS--Gulf	-1.44	-1.44
HRS	ND--Portland	-1.93	-1.84

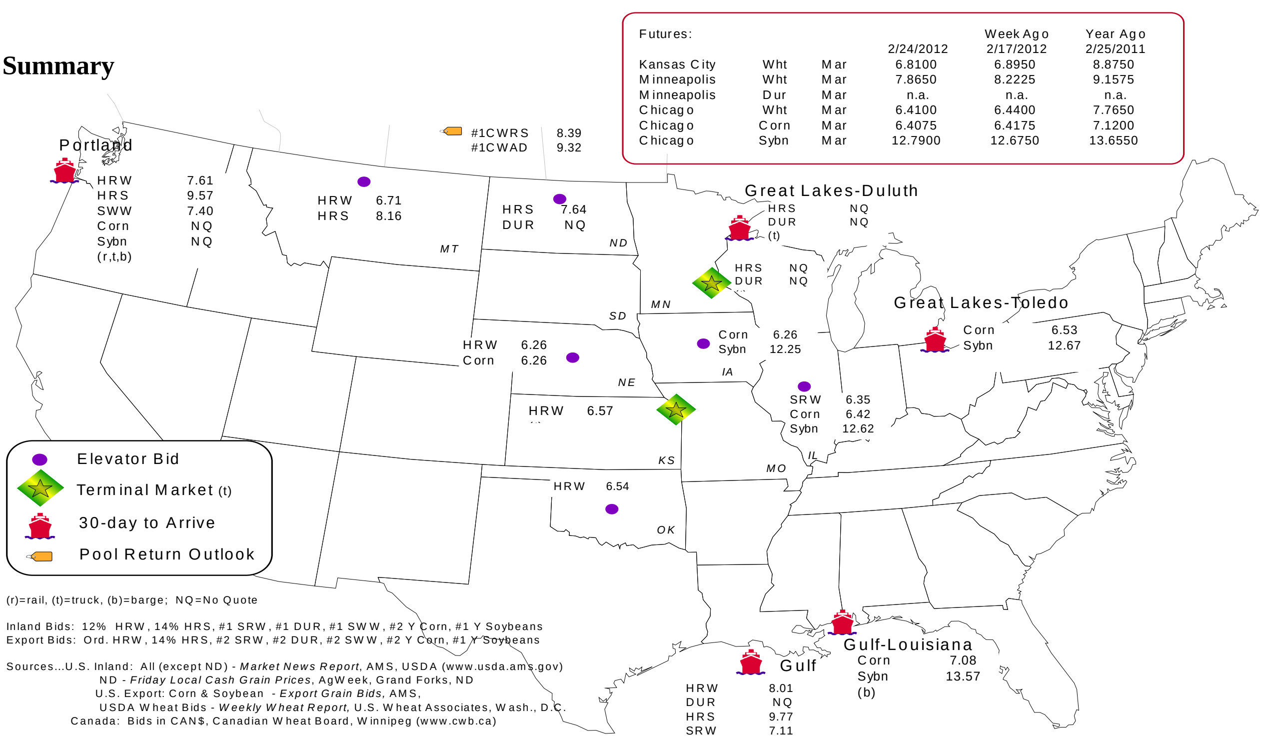
Note: nq = no quote

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 Gulf	Texas Gulf	Cross-Border Mexico	Pacific Northwest	Atlantic & East Gulf	Total
2/22/2012[p]	567	175	1,504	3,501	601	6,348
2/15/2011[r]	630	662	928	3,287	845	6,352
2012 YTD	1,988	5,406	8,360	23,849	4,082	43,685
2011 YTD	4,023	12,802	6,249	26,316	9,290	58,680
2012 YTD as % of 2011 YTD	49	42	134	91	44	74
Last 4 weeks as % of 2011[2]	46	27	161	80	90	69
Last 4 weeks as % of 4-year avg.[2]	43	29	145	82	69	69
Total 2011	27,358	77,515	48,782	178,990	24,088	356,733
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.

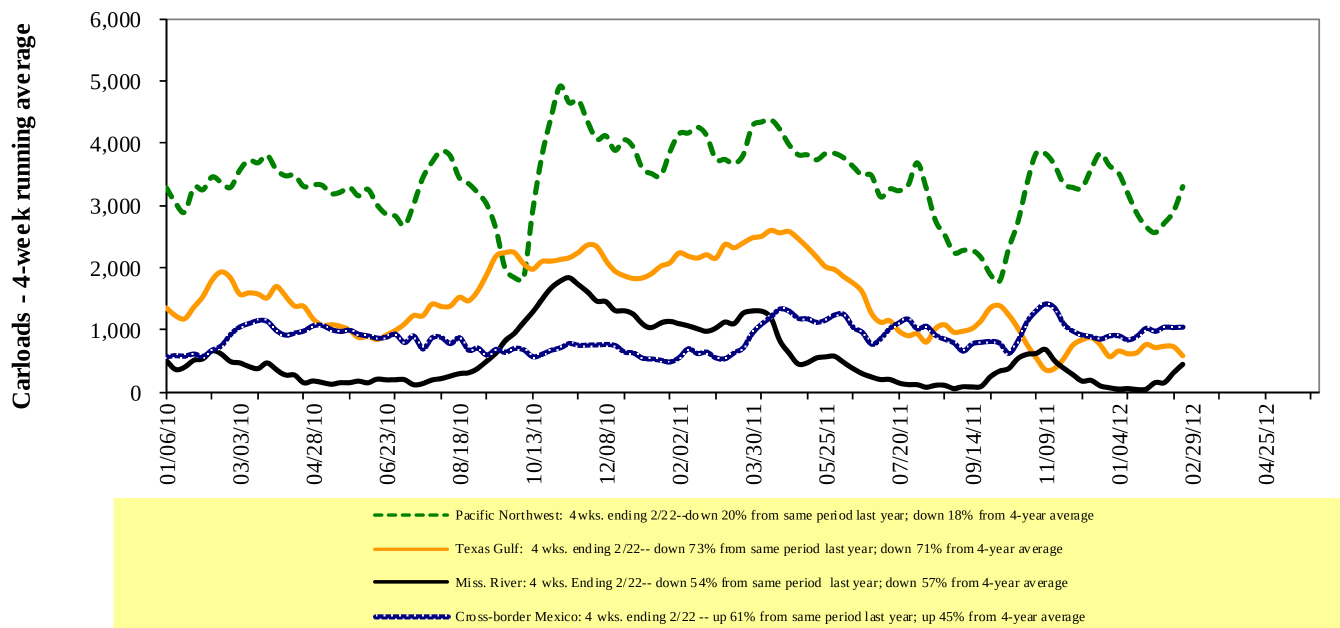
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

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)

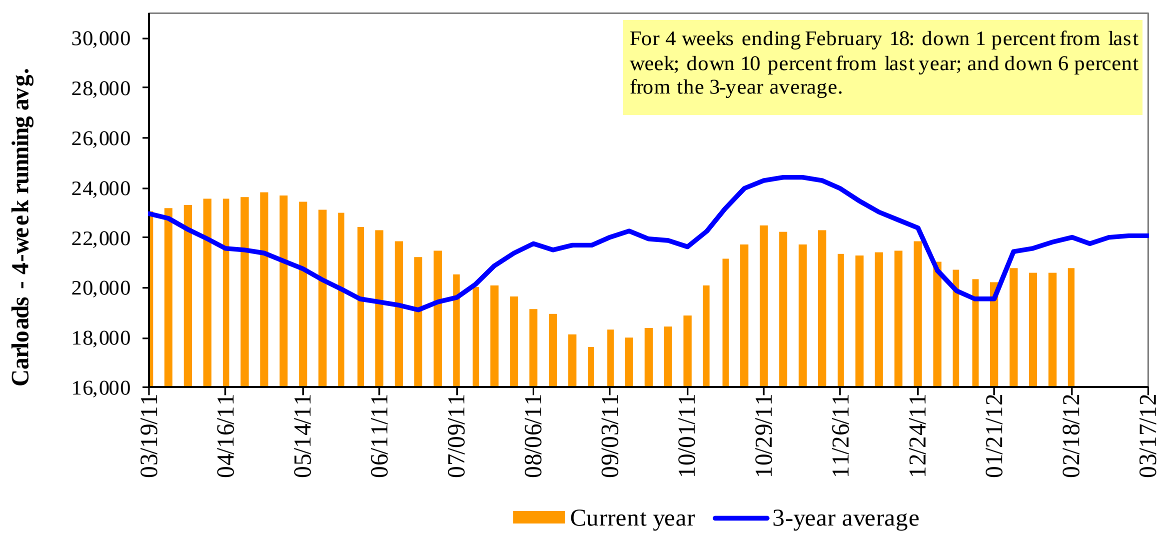
Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
02/18/12	2,825	2,991	9,912	311	5,649	21,688	4,317	4,832
This week last year	2,039	2,892	11,414	636	6,431	23,412	3,705	5,089
2012 YTD	15,702	20,847	70,057	3,563	36,070	146,239	26,716	35,718
2011 YTD	15,720	20,665	81,503	4,320	43,137	165,345	26,155	32,108
2012 YTD as % of 2011 YTD	100	101	86	82	84	88	102	111
Last 4 weeks as % of 2011[1]	110	107	86	87	84	90	107	117
Last 4 weeks as % of 3-yr avg.[1]	106	108	93	72	91	95	97	109
Total 2011	98,506	150,869	546,090	34,683	292,401	1,122,549	200,610	269,399

[1]As a percent of the same period in 2009 and the prior 3-year average. YTD = year-to-date.

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

Figure 3

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



Source: Association of American Railroads

Table 5

Railcar Auction Offerings[1] ($/car)[2]

Week ending	Delivery period							
2/23/2012	Mar-12	Mar-11	Apr-12	Apr-11	May-12	May-11	Jun-12	Jun-11
BNSF[3]								
COT grain units	3	no offer	0	18	0	0	no bids	0
COT grain single-car[5]	1 . . 2	no offer	1 . . 10	no offer	1 . . 10	0 . . 5	no offer	0
UP[4]								
GCAS/Region 1	1	no bids	no bids	no bids	no bids	no bids	n/a	n/a
GCAS/Region 2	no bids	no bids	no bids	no bids	no bids	no bids	n/a	n/a

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

[2]Average premium/discount to tariff, last auction

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

[4]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.

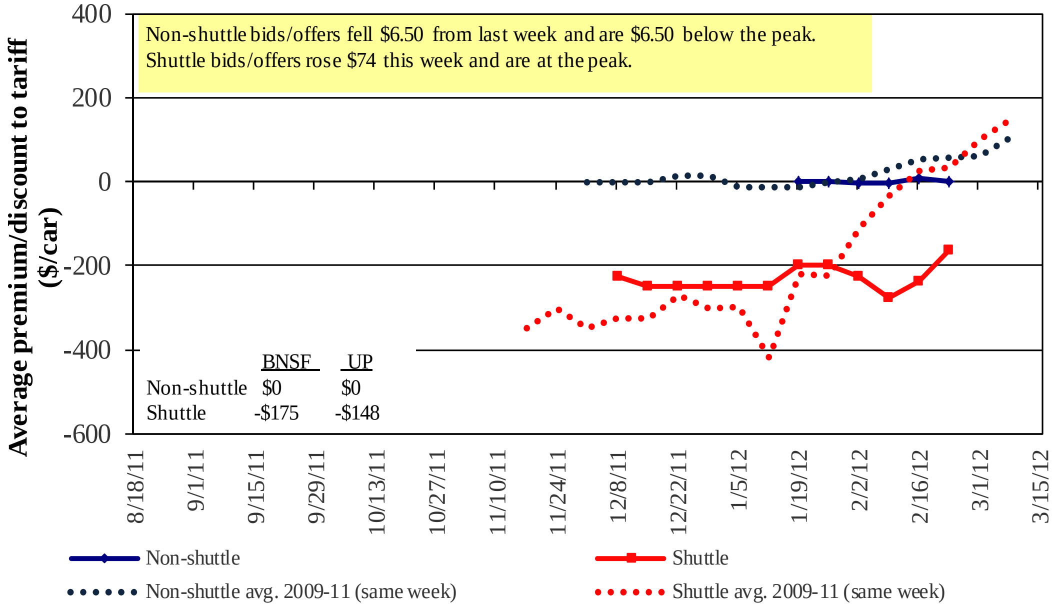
[5]Range is shown because average is not available. Not available = n/a.

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 March 2012, Secondary Market

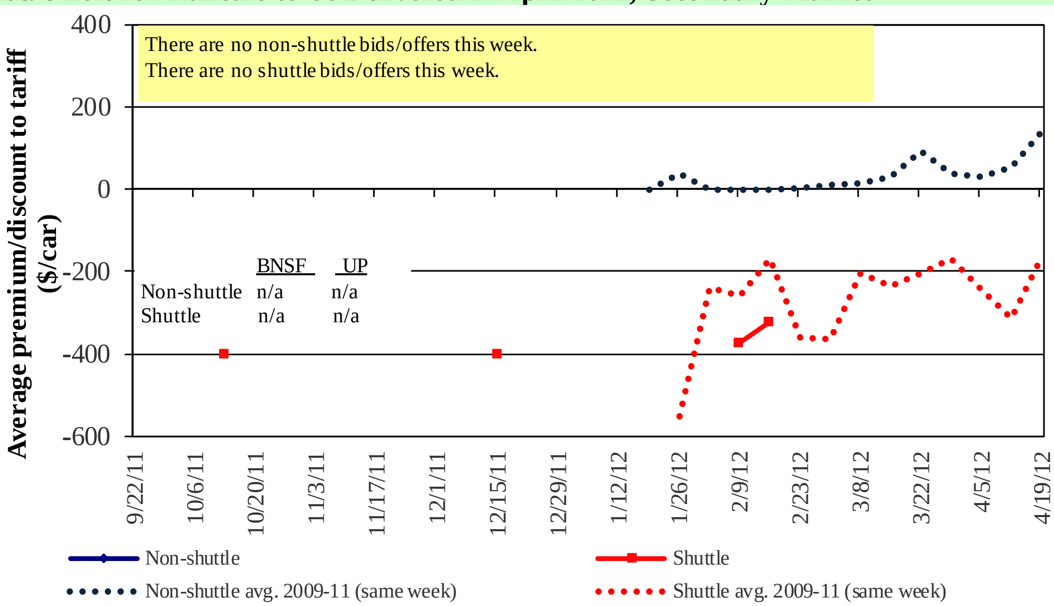


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

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

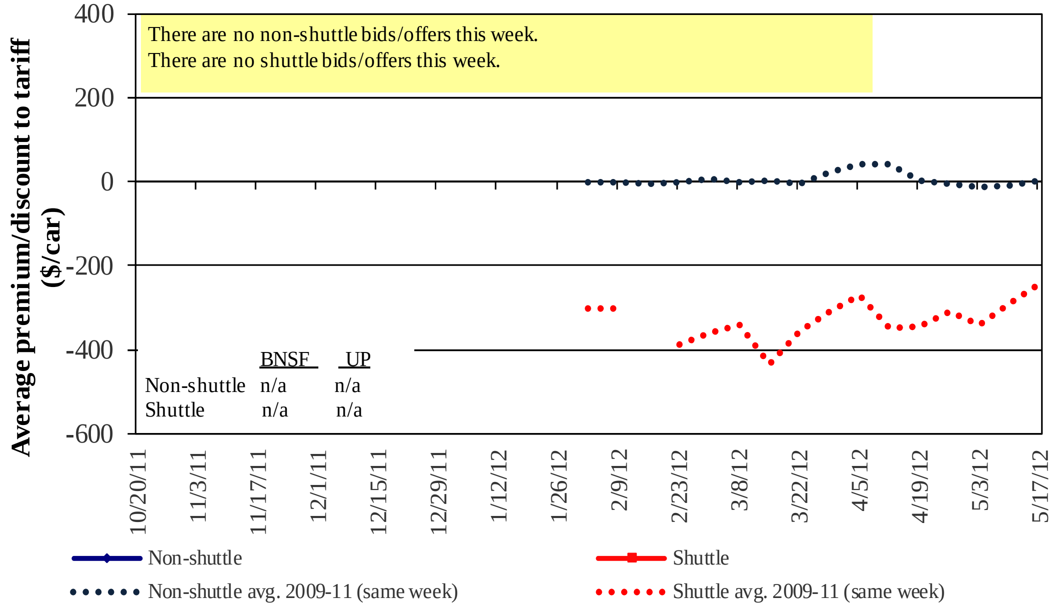


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in May 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					
2/23/2012	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**
Non-shuttle						
BNSF-GF	-	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 2010	(325)	n/a	n/a	n/a	n/a	n/a
UP-Pool	-	n/a	n/a	n/a	n/a	n/a
Change from last week	-	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(25)	n/a	n/a	n/a	n/a	n/a
Shuttle[2]						
BNSF-GF	(175)	n/a	n/a	n/a	n/a	n/a
Change from last week	58	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(383)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(148)	n/a	n/a	n/a	n/a	n/a
Change from last week	90	n/a	n/a	n/a	n/a	n/a
Change from same week 2010	(223)	n/a	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 Shipments[1]

Effective date: 3/1/2012	Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per: metric ton	Tariff plus surcharge per: bushel[2]	Percent change Y/Y[3]
Unit train							
Wheat	Wichita, KS	St. Louis, MO	$2,992	$177	$31.47	$0.86	5
	Grand Forks, ND	Duluth-Superior, MN	$3,260	$101	$33.38	$0.91	20
	Wichita, KS	Los Angeles, CA	$5,895	$520	$63.71	$1.73	15
	Wichita, KS	New Orleans, LA	$3,492	$312	$37.77	$1.03	5
	Sioux Falls, SD	Galveston-Houston, TX	$5,573	$427	$59.58	$1.62	10
	Northwest KS	Galveston-Houston, TX	$3,760	$341	$40.73	$1.11	5
	Amarillo, TX	Los Angeles, CA	$3,959	$475	$44.03	$1.20	5
Corn	Champaign-Urbana, IL	New Orleans, LA	$3,038	$352	$33.67	$0.92	10
	Toledo, OH	Raleigh, NC	$4,382	$398	$47.47	$1.29	18
	Des Moines, IA	Davenport, IA	$1,934	$75	$19.95	$0.54	6
	Indianapolis, IN	Atlanta, GA	$3,821	$299	$40.91	$1.11	20
	Indianapolis, IN	Knoxville, TN	$3,273	$192	$34.41	$0.94	19
	Des Moines, IA	Little Rock, AR	$3,074	$219	$32.70	$0.89	6
	Des Moines, IA	Los Angeles, CA	$5,825	$638	$64.18	$1.75	33
Soybeans	Minneapolis, MN	New Orleans, LA	$3,499	$387	$38.59	$1.05	6
	Toledo, OH	Huntsville, AL	$3,497	$283	$37.54	$1.02	21
	Indianapolis, IN	Raleigh, NC	$4,453	$401	$48.20	$1.31	17
	Indianapolis, IN	Huntsville, AL	$3,189	$192	$33.57	$0.91	23
	Champaign-Urbana, IL	New Orleans, LA	$3,382	$352	$37.08	$1.01	9
Shuttle Train							
Wheat	Great Falls, MT	Portland, OR	$3,351	$299	$36.25	$0.99	15
	Wichita, KS	Galveston-Houston, TX	$3,247	$233	$34.56	$0.94	11
	Chicago, IL	Albany, NY	$3,645	$374	$39.91	$1.09	6
	Grand Forks, ND	Portland, OR	$4,832	$517	$53.12	$1.45	17
	Grand Forks, ND	Galveston-Houston, TX	$5,854	$538	$63.48	$1.73	16
	Northwest KS	Portland, OR	$4,727	$560	$52.50	$1.43	5
Corn	Minneapolis, MN	Portland, OR	$4,800	$629	$53.92	$1.47	19
	Sioux Falls, SD	Tacoma, WA	$4,760	$576	$52.99	$1.44	18
	Champaign-Urbana, IL	New Orleans, LA	$2,857	$352	$31.87	$0.87	9
	Lincoln, NE	Galveston-Houston, TX	$3,310	$336	$36.21	$0.99	17
	Des Moines, IA	Amarillo, TX	$3,430	$275	$36.80	$1.00	5
	Minneapolis, MN	Tacoma, WA	$4,800	$624	$53.87	$1.47	19
	Council Bluffs, IA	Stockton, CA	$4,200	$646	$48.12	$1.31	24
Soybeans	Sioux Falls, SD	Tacoma, WA	$5,040	$576	$55.77	$1.52	19
	Minneapolis, MN	Portland, OR	$5,030	$629	$56.20	$1.53	21
	Fargo, ND	Tacoma, WA	$4,930	$512	$54.05	$1.47	18
	Council Bluffs, IA	New Orleans, LA	$3,710	$406	$40.87	$1.11	8
	Toledo, OH	Huntsville, AL	$2,672	$283	$29.34	$0.80	7
	Grand Island, NE	Portland, OR	$5,115	$573	$56.48	$1.54	15

[1]A 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.

[2]Approximate load per car = 111 short tons (100.7 metric tons): corn 56 lbs./bu., wheat & soybeans 60 lbs./bu.

[3]Percentage change year over year calculated using tariff rate plus fuel surchage

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 surcharge per car[2]	Tariff plus surcharge per: metric ton[3]	Tariff plus surcharge per: bushel[3]	Percent change Y/Y[4]
Effective date: 3/1/2012							
Wheat	MT	Chihuahua, CI	$7,741	$547	$84.68	$2.30	15
	OK	Cuautitlan, EM	$6,747	$573	$74.79	$2.03	11
	KS	Guadalajara, JA	$7,411	$860	$84.51	$2.30	10
	TX	Salinas Victoria, NL	$3,703	$233	$40.22	$1.09	8
Corn	IA	Guadalajara, JA	$7,699	$867	$87.52	$2.22	11
	SD	Penjamo, GJ	$7,776	$715	$86.76	$2.20	20
	NE	Queretaro, QA	$7,048	$739	$79.57	$2.02	15
	SD	Salinas Victoria, NL	$5,650	$544	$63.28	$1.61	20
	MO	Tlalnepantla, EM	$6,263	$721	$71.36	$1.81	17
	SD	Torreon, CU	$6,522	$599	$72.76	$1.85	17
Soybeans	MO	Bojay (Tula), HG	$6,926	$754	$78.47	$2.13	13
	NE	Guadalajara, JA	$7,904	$867	$89.62	$2.44	14
	IA	El Castillo, JA[5]	$8,255	$711	$91.61	$2.49	19
	KS	Torreon, CU	$6,396	$591	$71.39	$1.94	14
Sorghum	OK	Cuautitlan, EM	$5,670	$543	$63.48	$1.61	22
	TX	Guadalajara, JA	$6,653	$465	$72.73	$1.85	17
	NE	Penjamo, GJ	$7,426	$810	$84.16	$2.14	18
	KS	Queretaro, QA	$6,353	$508	$70.10	$1.78	14
	NE	Salinas Victoria, NL	$5,103	$483	$57.07	$1.45	15
	NE	Torreon, CU	$6,068	$626	$68.39	$1.74	11

[1]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.

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

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

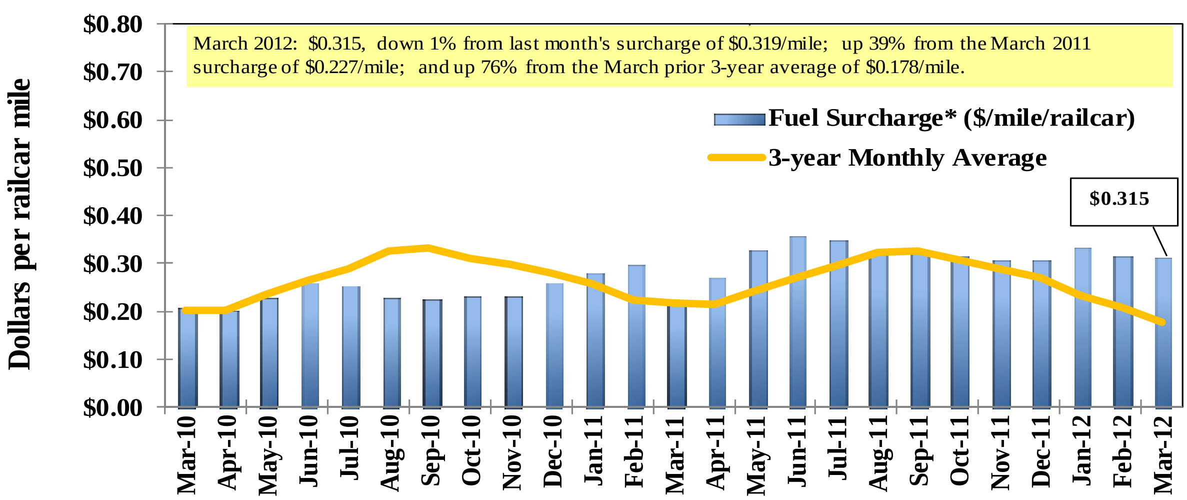
[4]Percentage change year over year calculated using tariff rate plus fuel surchage

[5] Beginning 12/6/10, El Castillo, JA replaced Penjamo, GJ as the destination

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

Figure 7

Railroad Fuel Surcharges, North American Weighted Average[1]



[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.

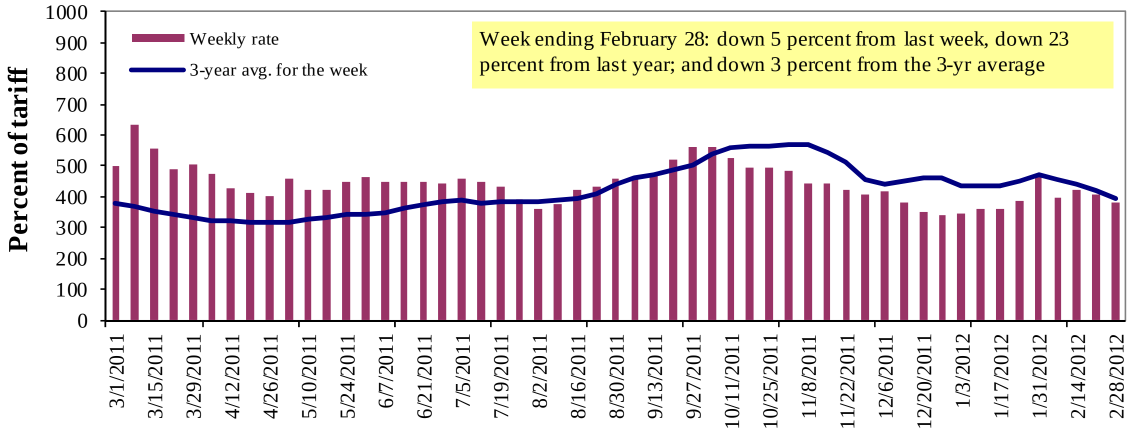
** BNSF strike price (diesel price when fuel surcharges begin) changed from $1.25/gal. to $2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was $0.227/mile instead of $0.331/mile.

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]



[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average of the 3-year average.

Source: Transportation & Marketing Programs/AMS/USDA

Table 9

Weekly Barge Freight Rates: Southbound Only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate[1]	2/28/2012	--	--	383	282	342	342	242
	2/21/2012	--	--	405	300	342	342	258
$/ton	2/28/2012	--	--	17.77	11.25	16.04	13.82	7.60
	2/21/2012	--	--	18.79	11.97	16.04	13.82	8.10
Current week % change from the same week:								
	Last year	--	--	-23	-26	-19	-20	-27
	3-year avg. [2]	--	--	-3	-6	6	6	-10
Rate[1]	March	--	407	382	282	342	3342	243
	May	435	392	377	272	337	337	237

[1]Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); [2]4-week moving average; ton = 2,000 pounds

Source: Transportation & Marketing Programs/AMS/USDA

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 9

Benchmark tariff rates

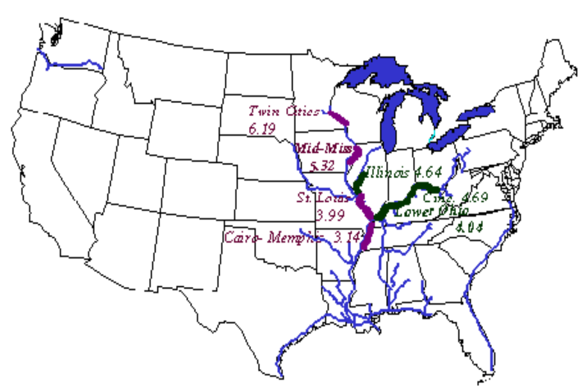
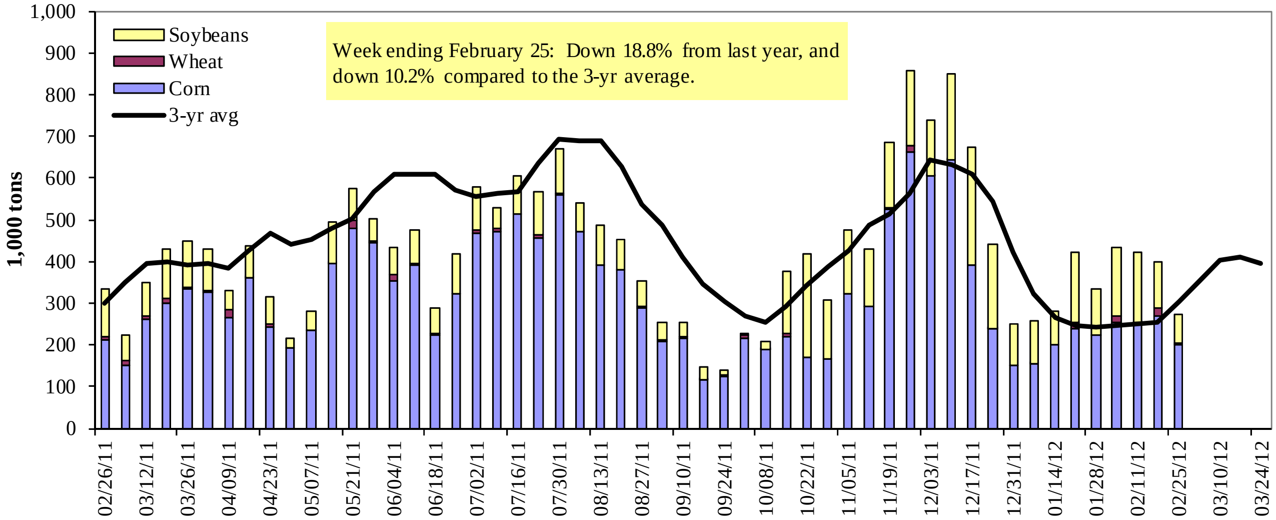


Figure 10

Barge Movements on the Mississippi River[1] (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/webrpts/default.asp)

Table 10

Barge Grain Movements (1,000 tons)

Week ending 2/25/2012	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	2	0	0	0	2
Alton, IL (L26)	162	0	58	5	225
Granite City, IL (L27)	200	3	69	5	277
Illinois River (L8)	132	3	56	5	196
Ohio River (L52)	93	7	102	0	202
Arkansas River (L1)	0	18	17	0	35
Weekly total - 2012	294	28	188	5	514
Weekly total - 2011	335	10	226	7	579
2012 YTD[1]	2,798	212	2,097	36	5,144
2011 YTD	2,389	137	1,902	43	4,471
2012 as % of 2011 YTD	117	155	110	84	115
Last 4 weeks as % of 2011[2]	125	187	118	102	124
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.

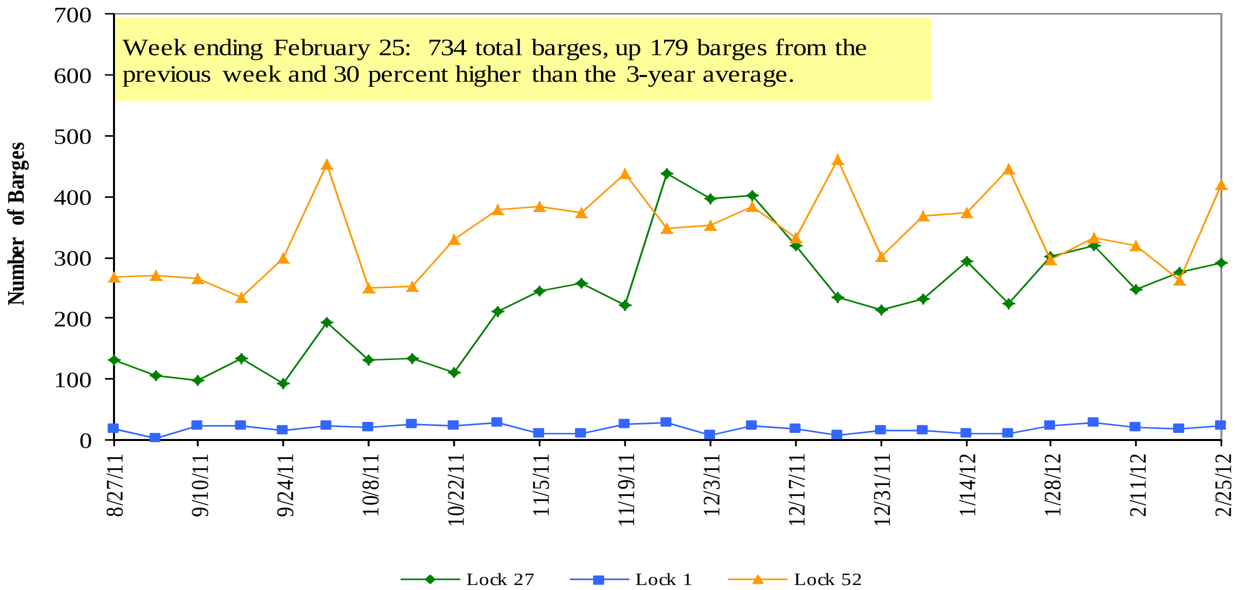
[2] As a percent of same period in 2011.

Note: Total may not add exactly, due to rounding

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

Figure 11

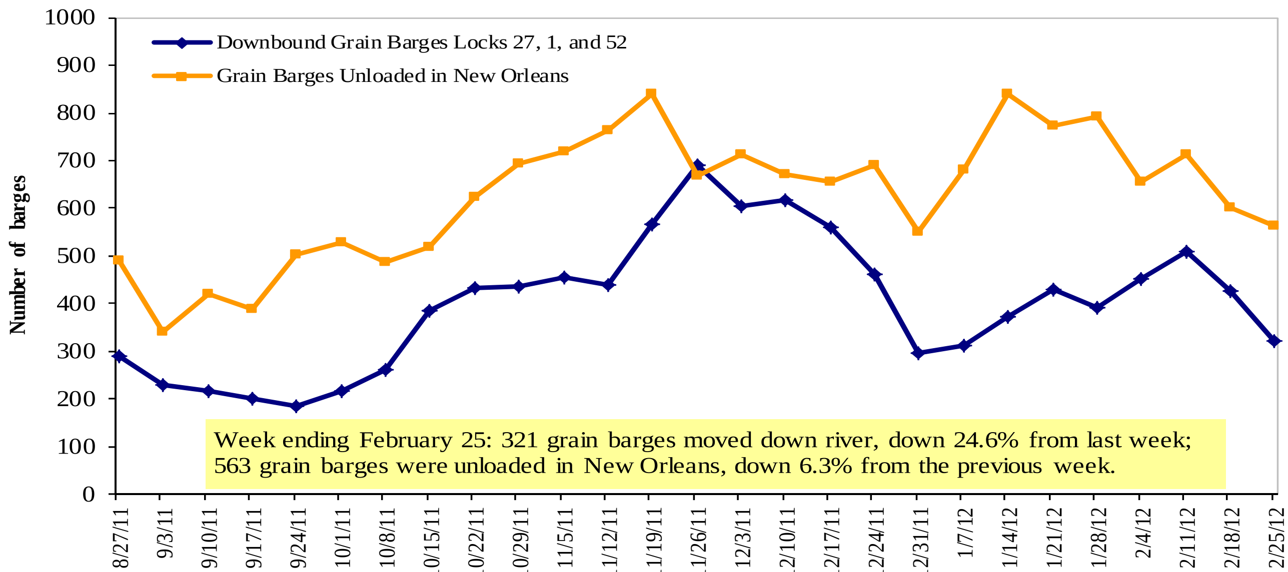
Upbound Empty Barges Transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Locks and Dam 52



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[1], Week Ending 2/27/2012 (US $/gallon)

Region	Location	Price	Change from Week ago	Change from Year ago
I	East Coast	4.134	0.081	0.370
	New England	4.221	0.060	0.318
	Central Atlantic	4.208	0.066	0.333
	Lower Atlantic	4.063	0.097	0.360
II	Midwest[2]	3.914	0.066	0.253
III	Gulf Coast[3]	3.992	0.106	0.336
IV	Rocky Mountain	3.919	0.062	0.221
V	West Coast	4.326	0.162	0.434
	California	4.410	0.152	0.446
Total	U.S.	4.051	0.091	0.335

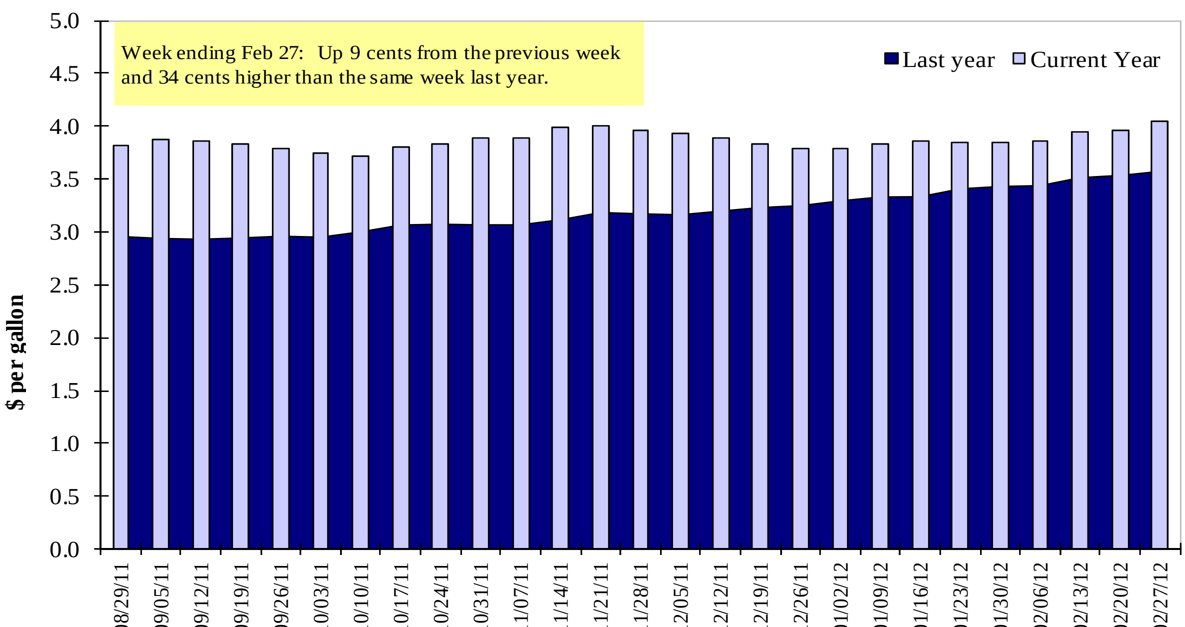
[1]Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

[2]Same as North Central [3]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)

	Wheat						Corn	Soybeans	Total
Week ending	HRW	SRW	HRS	SWW	DUR	All wheat			
Export Balances[1]									
2/16/2012	1,215	913	1,229	1,708	22	5,087	10,729	5,979	21,795
This week year ago	3,720	820	2,618	1,215	129	8,502	13,238	9,719	31,459
Cumulative exports-marketing year[2]									
2011/12 YTD	7,310	2,390	4,658	3,663	388	18,409	19,435	22,408	60,252
2010/11 YTD	10,588	1,723	5,721	3,373	744	22,150	19,650	29,318	71,118
YTD 2011/12 as % of 2010/11	69	139	81	109	52	83	99	76	85
Last 4 wks as % of same period 2010/11	36	91	44	137	21	58	80	66	70
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 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[1] of U.S. Corn

Week ending 02/16/12	**Total Commitments**[2]		**% change**	**Exports**[3]
	2011/12	**2010/11**	**current MY**	
	Current MY	**Last MY**	**from last MY**	**2010/11**
	- 1,000 mt -			- 1,000 mt -
Japan	7,851	9,491	(17)	14,279
Mexico	7,745	5,447	42	7,019
Korea	3,219	3,677	(12)	6,104
Egypt	708	2,228	(68)	3,302
Taiwan	1,185	1,676	(29)	2,393
Top 5 importers	**20,708**	**22,518**	**(8)**	**33,096**
Total US corn export sales	**30,164**	**32,889**	**(8)**	**46,600**
% of Projected	70%	71%		
Change from Last Week	841	1,501		
Top 5 importers' share of U.S. corn export sales	69%	68%		
USDA forecast, February 2012	**43,180**	**46,600**	**(7)**	
Corn Use for Ethanol USDA forecast, Ethanol February 2012	**127,000**	**127,534**	**(0.4)**	

(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.

[3]FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 14

Top 5 Importers[1] of U.S. Soybeans

Week Ending 02/16/2012	**Total Commitments[2] 2011/12 Current MY**	**2010/11 Last MY**	**% change current MY from last MY**	**Exports[3] 2010/11**
	- 1,000 mt -			- 1,000 mt -
China	19,242	24,305	(21)	24,445
Mexico	1,890	2,219	(15)	3,215
Japan	1,254	1,671	(25)	1,887
EU-25	755	2,381	(68)	2,607
Indonesia	970	957	1	1,397
Top 5 importers	**24,111**	**31,533**	**(24)**	**33,551**
Total US soybean export sales	**28,387**	**39,037**	**(27)**	**40,860**
% of Projected	82%	96%		
Change from last week	1,160	135		
Top 5 importers' share of U.S. soybean export sales	85%	81%		
USDA forecast, February 2012	**34,700**	**40,860**	**(15)**	
Soybean Use for Biodiesel USDA forecast, February 2012	**8,632**	**6,115**	**41**	

(n) indicates negative number.

1 Based on FAS 2008/09 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.

3 FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 15

Top 10 Importers[1] of All U.S. Wheat

Week Ending 02/16/2012	**Total Commitments[2] 2011/12 Current MY**	**2010/11 Last MY**	**% change current MY from last MY**	**Exports[3] 2010/11**
	- 1,000 mt -			- 1,000 mt -
Nigeria	2,683	2,842	(6)	3,233
Japan	3,294	3,233	2	3,148
Mexico	3,083	2,546	21	2,601
Philippines	1,869	1,830	2	1,518
Korea	1,579	1,504	5	1,111
Peru	566	862	(34)	923
Taiwan	769	820	(6)	913
Colombia	423	670	(37)	783
Indonesia	676	555	22	781
Yemen	417	613	(32)	659
Top 10 importers	**15,360**	**15,474**	**(0.7)**	**15,670**
Total US wheat export sales	**23,496**	**30,652**	**(23)**	**35,080**
% of Projected	89%	87%		
Change from last week	702	1,008		
Top 10 importers' share of U.S. wheat export sales	65%	50%		
USDA forecast, February 2012	**26,540**	**35,080**	**(24)**	

(n) indicates negative number.

1 Modified from the FAS **2010/11** Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year = Jun 1 - May 31.

2 Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report.

3 FAS Marketing Year Final Reports - www.fas.usda.gov/export-sales/myfi_rpt.htm.

Table 16

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

Port regions	Week ending 02/23/12	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 2011	Last 4-weeks as % of 3-yr. avg.	Total[1] 2011
Pacific Northwest									
Wheat	205	375	55	1,879	2,064	91	108	136	13,995
Corn	108	112	96	807	1,017	79	105	88	9,198
Soybeans	382	301	127	2,084	1,847	113	106	109	7,321
Total	**695**	**789**	**88**	**4,770**	**4,927**	**97**	**107**	**114**	**30,513**
Mississippi Gulf									
Wheat	38	80	48	716	757	95	84	102	5,031
Corn	459	556	83	3,921	3,567	110	102	102	26,267
Soybeans	502	577	87	4,924	5,773	85	80	90	19,262
Total	**999**	**1,214**	**82**	**9,562**	**10,097**	**95**	**89**	**96**	**50,560**
Texas Gulf									
Wheat	0	115	0	705	2,145	33	25	38	10,837
Corn	1	33	4	35	136	26	53	22	1,021
Soybeans	0	0	n/a	0	626	0	0	0	926
Total	**1**	**148**	**1**	**741**	**2,906**	**25**	**22**	**28**	**12,784**
Interior									
Wheat	12	36	33	121	205	59	60	107	1,110
Corn	118	181	65	1,206	744	162	64	140	7,509
Soybeans	81	83	98	704	557	126	108	112	4,273
Total	**211**	**300**	**71**	**2,031**	**1,507**	**135**	**77**	**127**	**12,892**
Great Lakes									
Wheat	0	0	n/a	0	7	0	0	0	1,038
Corn	0	0	n/a	14	0	n/a	n/a	0	178
Soybeans	0	0	0	0	0	n/a	n/a	0	382
Total	**0**	**0**	**0**	**15**	**7**	**224**	**7**	**15**	**1,598**
Atlantic									
Wheat	0	0	n/a	2	269	1	0	0	686
Corn	2	5	43	38	53	71	79	75	295
Soybeans	13	27	47	245	262	93	130	76	1,042
Total	**15**	**32**	**46**	**284**	**584**	**49**	**60**	**58**	**2,022**
U.S. total from ports[2]									
Wheat	255	607	42	3,423	5,447	63	64	88	32,697
Corn	688	886	78	6,022	5,516	109	108	101	44,466
Soybeans	978	989	99	7,958	9,065	88	86	91	33,205
Total	**1,921**	**2,483**	**77**	**17,403**	**20,027**	**87**	**87**	**94**	**110,369**

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

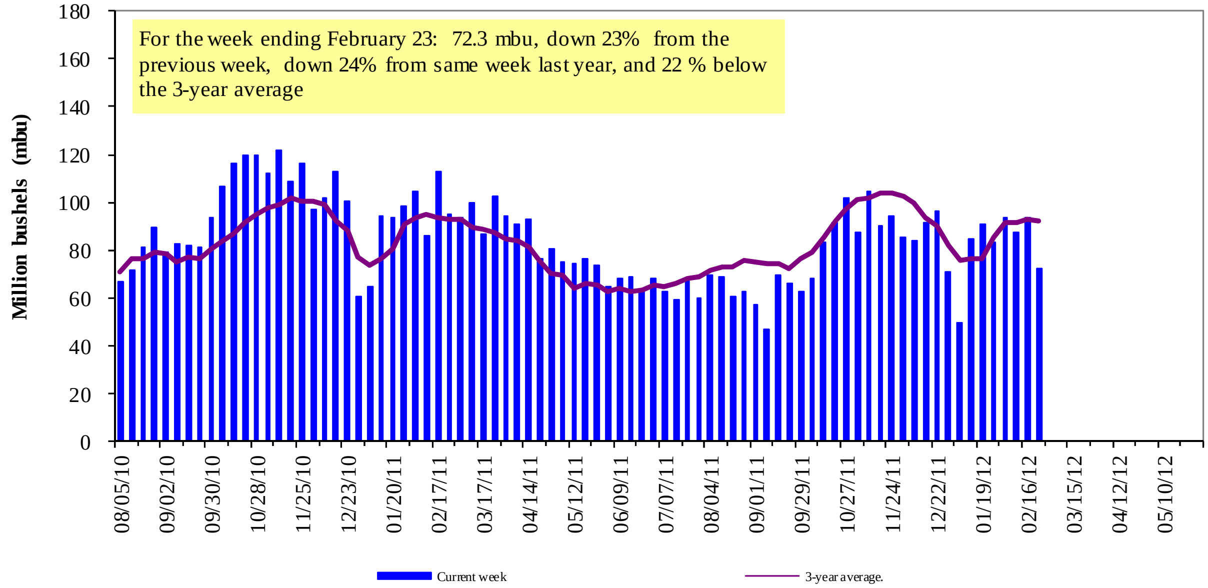
[2] Total includes only port regions shown above; Interior land-based shipments now included.

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)

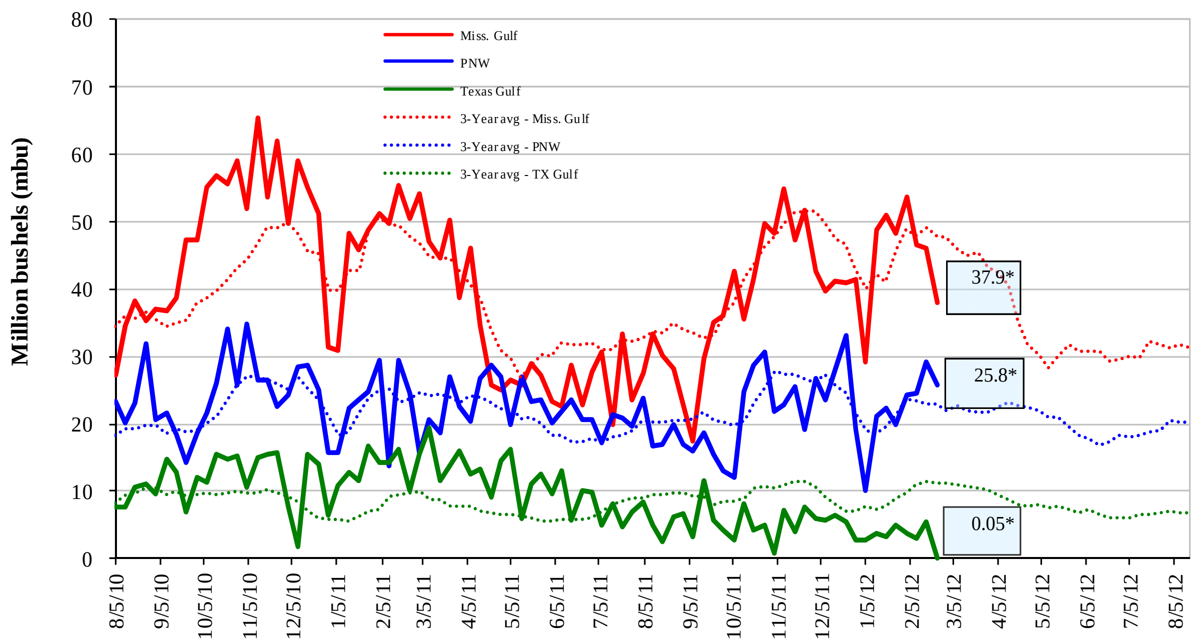


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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

Figure 15

U.S. Grain Inspections: U.S. Gulf and PNW[1] (wheat, corn, and soybeans)



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

February 23 % change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 18	down 99	down 26	down 12
Last year (same week)	down 25	down 100	down 37	up 5.3
3-yr avg. (4-wk mov. avg.)	down 21	down 100	down 36	up 10

Ocean Transportation

Table 17

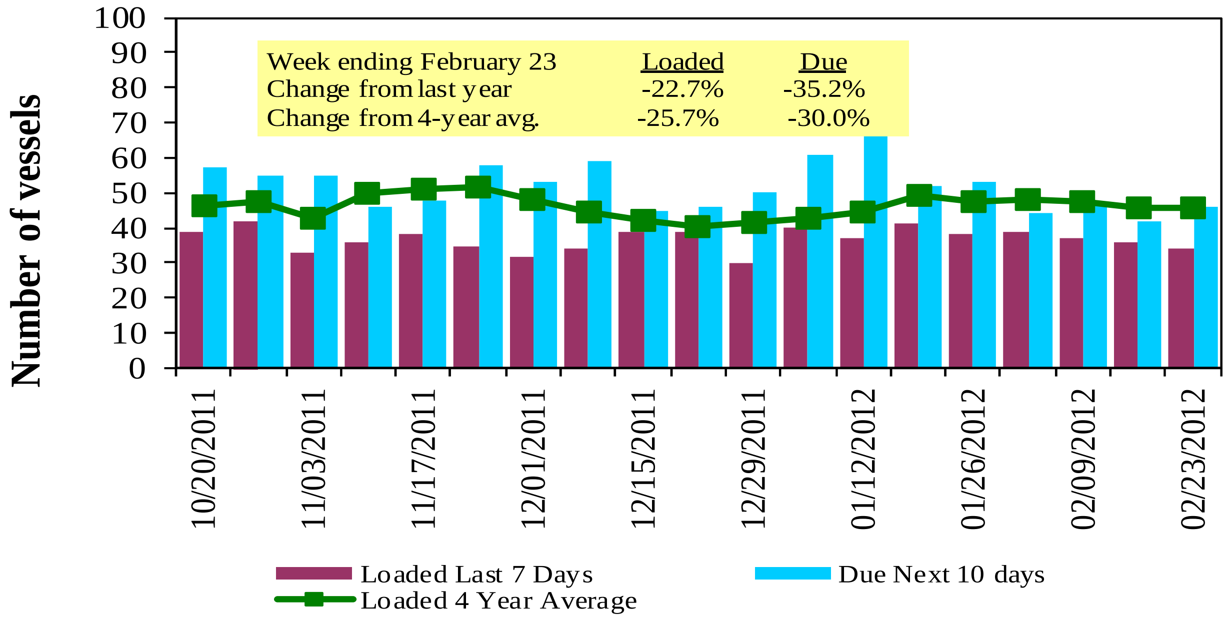
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

	Gulf			Pacific Northwest	Vancouver B.C.
Date	In port	Loaded 7-days	Due next 10-days	In port	In port
2/23/2012	20	34	46	11	n/a
1/26/2012	36	38	53	5	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

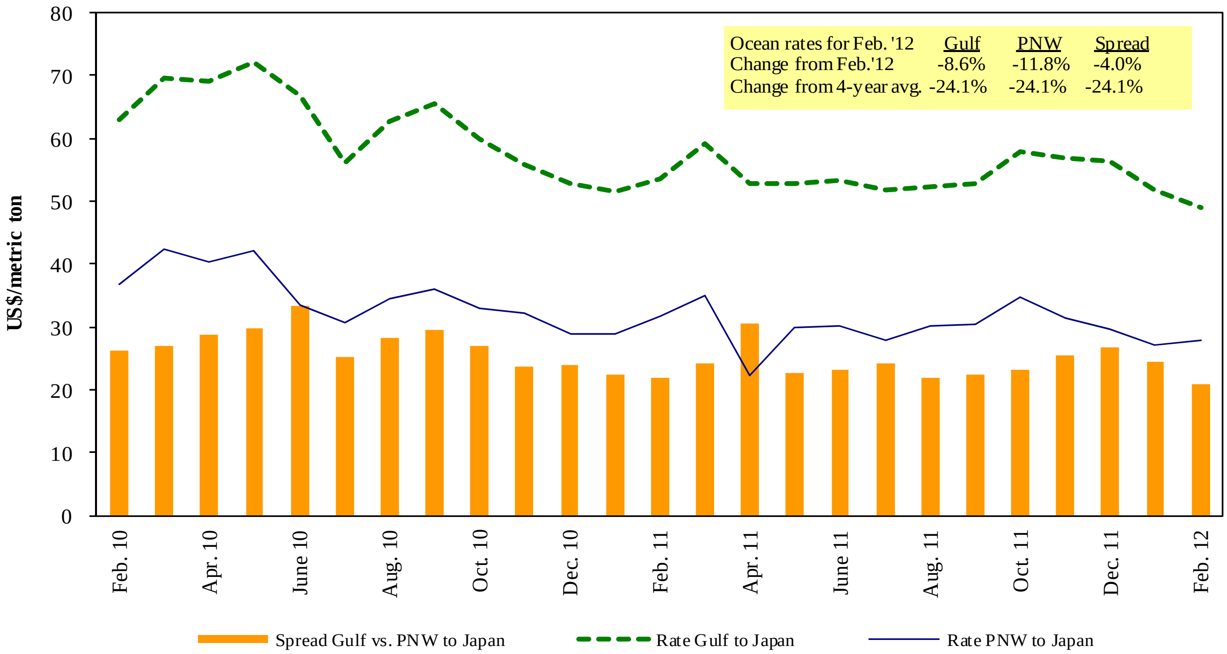
U.S. Gulf[1] Vessel Loading Activity



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 2/25/2012

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy Grain	Mar 1/10	50,000	46.65
U.S. Gulf	China	Heavy Grain	Feb 20/29	55,000	46.70
U.S. Gulf	China	Heavy Grain	Feb 1/10	55,000	51.00
U.S. Gulf	China	Heavy Grain	Feb 15/25	55,000	52.50
U.S. Gulf	Korea	Heavy Grain	Mar 1/10	55,000	46.00
U.S. Gulf	Tunisia	Soybeans	Jan 10/15	30,000	37.50
U.S. Gulf	Turkey	Heavy Grain	Feb 25/28	50,000	25.00
U.S. Gulf	Kenya[1]	Wheat	Jan 16/25	11,000	188.00
PNW	China	Grain	Jan 10/20	55,000	26.75
Australia	Vietnam	Grain	Mar 1/10	60,000	19.00
Brazil	Tunisia	Wheat	Feb 14/16	23,750	38.50
Brazil	Taiwan	Heavy Grain	Feb 1/10	65,000	29.50
Brazil	China	Heavy Grain	Mar 5/15	60,000	43.00
Brazil	China	Heavy Grain	Mar 1/10	60,000	44.75
Brazil	China	Grain	Mar 1/10	55,000	47.00
River Plate	Algeria	Corn	Feb 21/22	25,000	34.00
River Plate	Algeria	Maize	Feb 5/15	25,000	32.50
River Plate	China	Heavy Grain	Feb 20/25	60,000	45.00
River Plate	Egypt Med	Corn	Feb 25/ Mar 5	30,000	39.25
River Plate	South Africa	Wheat	Feb 15/20	25,000	29.00

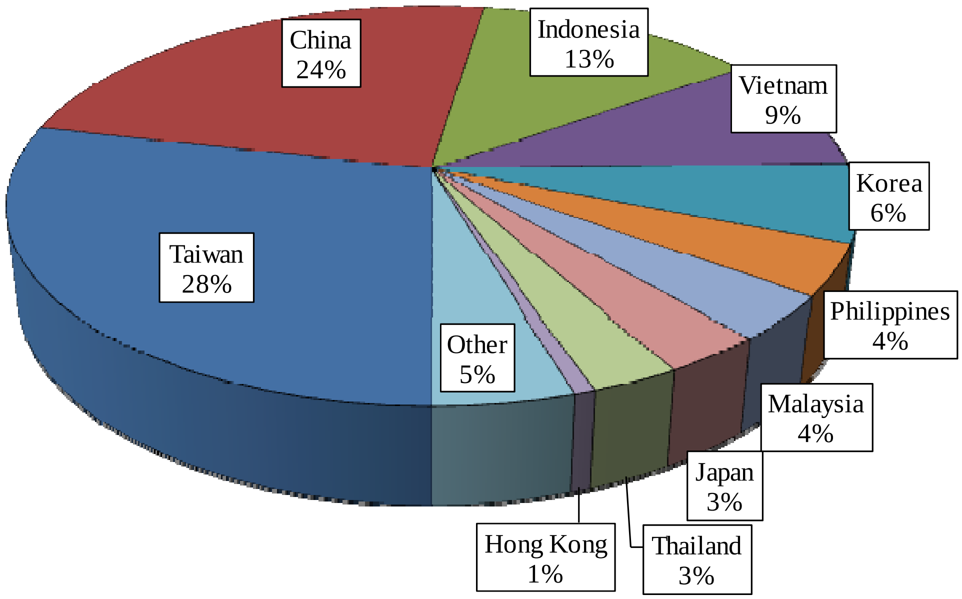
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

[1] 75 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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

Figure 18

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

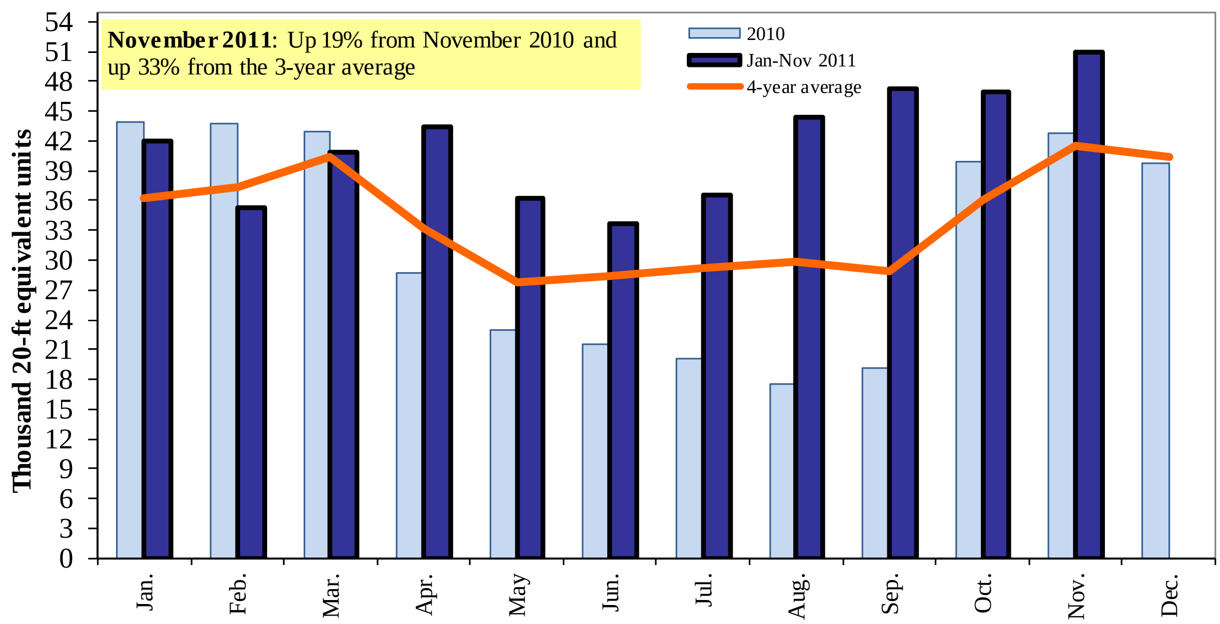


Source: USDA/Agricultural Marketing Service/Transportation Services Division analysis of Port Import Export Reporting Service (PIERS) data

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

Figure 19

Monthly Shipments of Containerized Grain to Asia



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

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

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