



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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WEEKLY HIGHLIGHTS

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Mississippi Gulf Grain Inspections Highest Since February

For the week ending May 21, **total inspections of grain** (corn, wheat, and soybeans) from the Mississippi Gulf reached 1.2 million metric tons (mmt), up 23 percent from the past week and 65 percent above last year. Although grain inspections in the Mississippi Gulf were the highest since late February, the increase could not offset the drop in Texas Gulf and Pacific Northwest, which decreased 70 and 26 percent, respectively. Total grain inspection from all major export regions reached 1.72 mmt, down 3 percent from the past week, 2 percent below last year, and 11 percent below the 3-year average. Wheat inspections jumped 28 percent from the previous week as shipments to Asia and Latin America increased, but inspections of corn and soybeans were down 10 and 12 percent from the past week.

Rail Traffic Slows, Employees Furloughed

The Association of American Railroads reported that for the first 19 weeks of 2015, cumulative traffic on U.S. railroads, including both intermodal and carload, was down 0.3 percent compared to last year. Intermodal units were up 1.9 percent from last year, but total carload volume was down 2.2 percent from the same period last year. Grain and oilseed traffic increased 6 percent from last year, but crude-by-rail movements dropped in the first quarter of 2015. Class I railroads reported a 13.7 percent decrease in crude-by-rail in the 1st quarter of 2015 compared with the 4th quarter of 2014. Several news sources have stated that BNSF Railway and Union Pacific are planning to reduce new hires over the next few months and have implemented workforce furloughs, citing declining volumes as the reason.

Labor Contract Ratified for West Coast Ports

Last week, the Pacific Maritime Association (PMA) and the International Longshore and Warehouse Union (ILWU) announced their members overwhelmingly voted to ratify a new 5-year labor contract for the majority of West Coast ports. The contract is retroactive to July 1, 2014 and runs through June 30, 2019. According to the PMA press release, the new contract features an enhanced arbitration system, changes to the health care plan that will foster greater efficiency, cost containment, and fraud protection, as well as increased wages and pension for ILWU members.

Snapshots by Sector

Export Sales

During the week ending May 14, **unshipped balances** of wheat, corn, and soybeans totaled 17.6 mmt, 6 percent lower than at the same time last year. **Corn export sales** reached 0.813 mmt—more than double the previous week, and 12 percent more than the 4-week average. **Wheat export sales** of 0.074 mmt were down 36 percent from the previous week. **Soybean export sales** of 0.165 mmt were up 21 percent from the previous week.

Rail

U.S. railroads originated 20,166 **carloads of grain** during the week ending May 16, up 12 percent from last week, down 4 percent from last year, and up 7 percent from the 3-year average.

During the week ending May 21, average June shuttle **secondary railcar bids/offers per car** were \$275 below tariff, down \$20 from last week and \$500 lower than last year. Non-shuttle secondary railcar bids/offers were \$73 below tariff, up \$65 from last week and \$148 lower than last year.

Barge

During the week ending May 23, **barge grain movements** totaled 832,908 tons—about 8 percent higher than the previous week and 26 percent higher than the same period last year.

During the week ending May 23, 538 grain barges **moved down river**, up 10 percent from last week; 608 grain barges were **unloaded in New Orleans**, down 10 percent from the previous week.

Ocean

During the week ending May 21, 35 **ocean-going grain vessels** were loaded in the Gulf, 21 percent more than the same period last year. Thirty-nine vessels are expected to be loaded within the next 10 days, 15 percent less than the same period last year.

During the week ending May 22, the ocean freight rate for shipping bulk grain from the Gulf to Japan was \$30.25 per metric ton (mt), up 1 percent from the previous week. The cost of shipping from the PNW to Japan was \$16.50 per mt, up 2 percent from the previous week.

Fuel

During the week ending May 25, U.S. average **diesel fuel prices** increased 1 cent from the previous week to \$2.91 per gallon—down \$1.01 from the same week last year.

Grain Transportation Update

After several years of back-to-back bumper crops, USDA projected corn and soybean production to be lower than the previous year, based on lower corn acreage and lower corn and soybean yields. Wheat production, however, is forecast to be higher based on higher Hard Red Winter and Soft White wheat production offsetting a projected decline in production of the other classes of wheat. USDA also projected lower soybean exports, but slightly higher total grain exports for the 2015/16 crop year. Meanwhile, recent grain shipments by rail have diminished as the graincar backlog has been mostly eliminated. Despite periods of unfavorable navigation conditions earlier in the year, grain barge movements have been above average and bulk ocean freights rates have remained low. Although rising crude oil prices pushed up diesel fuel prices in late February, late April, and May, diesel oil prices have fallen 30 cents per gallon so far this year and are still more than \$1 per gallon below the same period a year ago.

USDA Projects Slightly Higher Total Grain Exports, but Lower Soybean Exports in 2015/16

USDA's May World Agricultural Supply and Demand Estimates (WASDE) report contains the initial assessment of the upcoming 2015/16 crop year. This May, USDA projected a slightly lower 2015/16 production of corn, soybeans, and wheat (19.6 billion bushels), but slightly higher exports of the three crops (4.6 billion bushels) compared to 2014/15 (see table 1). After 2 years of back-to-back bumper crops, corn and soybean production is projected to be 705 million bushels lower than the previous year, based on lower corn acreage and lower corn and soybean yields. Wheat production, however, is forecast to be 61 million bushels higher based on higher Hard Red Winter and Soft White wheat production, offsetting a projected decline in production of the other classes of wheat.

USDA's detailed projections of wheat by class will be issued in the July WASDE. Total grain exports are expected to increase by 115 million bushels in 2015/16. Soybean exports, however, are expected to decrease by 25 million bushels from the record reached in 2014/15, as USDA expects competition from record supplies in South America to limit U.S. soybean exports during the first half of the 2015/16 marketing year. In recent years, soybean exports dominated grain transportation demand during the fall harvest. The current grain export projections indicate a fairly stable demand for grain transportation in the fall.

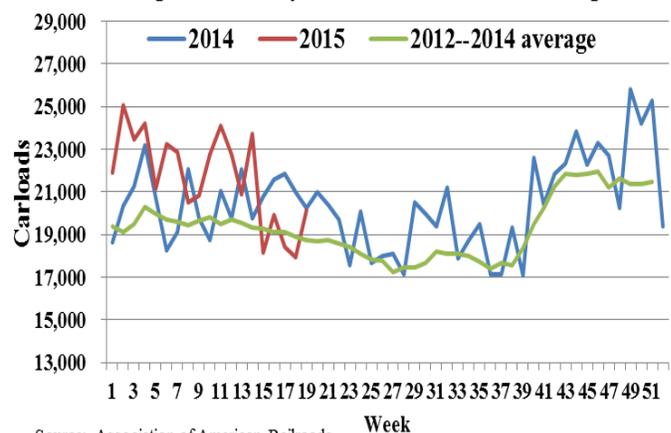
Table 1: Major Grains: Production and Use, May 2015, WASDE, (million bushels).

	Corn	Soybeans	Wheat	Total	Y/Y
United States 2015/16 (Projected)					
Production	13,630	3,850	2,087	19,567	-3%
Exports	1,900	1,775	925	4,600	3%
Domestic Use	11,860	1,954	1,219	15,033	1%
Ending Stocks/Use	13%	13%	37%		
2014/15 (Estimated)					
Production	14,216	3,969	2,026	20,211	5%
Exports	1,825	1,800	860	4,485	-5%
Domestic Use	11,797	1,941	1,197	14,935	2%
Ending Stocks/Use	14%	10%	34%		
2013/14					
Production	13,829	3,358	2,135	19,322	20%
Exports	1,917	1,647	1,176	4,740	55%
Domestic Use	11,537	1,831	1,255	14,623	8%
Ending Stocks/Use	9%	3%	24%		

As Railroads Eliminate Graincar Backlogs, Recent Grain Shipments Drop

As of May 16, a total of 412,225 graincars have been loaded during the first 19 weeks of 2015 on Class I railroads in the United States, 6 percent higher than the same period last year and 11 percent higher than the 3-year average (see figure 1). The completion of some track expansion projects, more equipment on-line, and more favorable winter weather have helped railroad performance so far this year. Graincar loadings have slowed down during the last 4 weeks, falling 10 percent below last year, but were still 1 percent more than the 3-year average (see figure 2). Meanwhile, as reported on May 20, railroads have nearly eliminated graincar backlogs, falling to a combined total of 2,064 cars past due for BNSF Railway (BNSF), Union Pacific (UP), and Canadian Pacific (CP) combined. Secondary railcar rates in 2015 have remained below those from last year and have generally been trading close to average, indicating adequate graincar supply. Currently, average bids for shuttle service are trading at \$275 per car below the tariff rate—\$500 below last year, but only \$35 below the 5-year average.

Figure 1: Weekly U.S. Class I Graincar Loadings

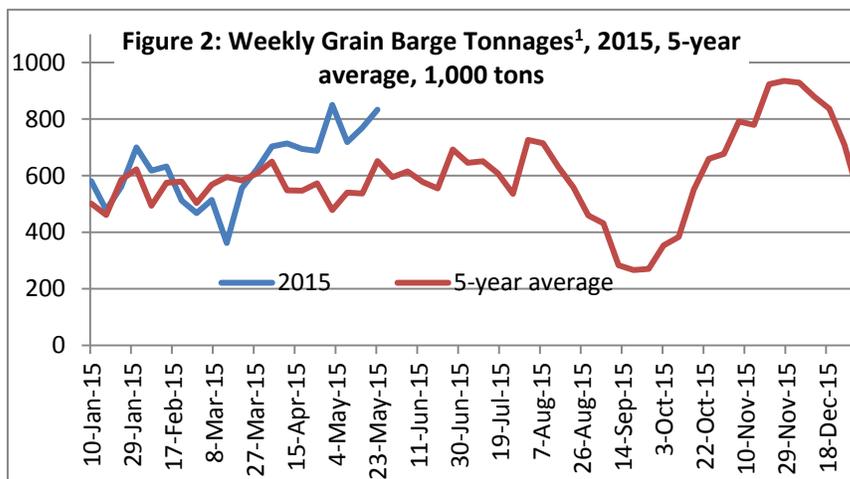


Source: Association of American Railroads

2015 Grain Barge Tonnages Above Average Despite Periods of Unfavorable Navigation Conditions

As of May 23, year-to-date barge grain tonnages¹ reached 12.574 million tons, 12 percent higher than the 5-year average. The increase occurred despite weather-related conditions that challenged navigation capabilities on the Mississippi, Illinois, Ohio, and Arkansas Rivers. Earlier in the year, extremely cold weather caused ice accumulations on the Upper Mississippi and Illinois Rivers that created traffic disruptions similar to the winter of 2014. The consistent freezing temperatures reduced water levels, which lowered barge drafts and slowed transit times. During early March, ice accumulations began to dissipate; however, the melting ice and rains caused high water on much of the river system. During high water events the U.S. Coast Guard places restrictions on barge traffic to maintain safe navigation. Restrictions may include the requirement that towing vessels have minimum horsepower capacities for specific tow sizes, which limits the size of tows; and, only allowing daylight passage through certain segments of the river system. Presently, high water has stopped almost all traffic on the Arkansas River. Since May 10, there was no reported down-bound grain traffic at Arkansas River Lock 1 (Tichnor, AR). In addition to weather-related issues, several scheduled and unscheduled repair projects are slowing traffic on the Upper Mississippi and Ohio Rivers.

Figure 2 shows a significant increase in grain tonnages during late March when weekly tonnages were consistently above average. Lower Illinois River barge rates for May are 390 percent of tariff (\$18.10 per ton), higher than the 5-year average of 360 percent of tariff (\$16.70 per ton). Lower Illinois River barge rates for October are 675 to 700 percent of tariff (\$31.32 to \$31.48 per ton), higher than the 5-year October average rate of 625 percent of tariff (\$29.00 /ton). Barge operators have indicated a strong interest from grain shippers in obtaining barge services in October when the harvest freight demand begins a steady increase until a late-November peak



Excess Vessel Supply Continued to Depress Ocean Freight Rates

Ocean freight rates for shipping bulk commodities, including grain, remained low as excess vessel capacity persists in the market. As of May 22, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$30.25 per metric ton (mt), a 22 percent decline from the beginning of the year and 38 percent lower than the 4-year average. The cost of shipping from the Pacific Northwest was \$16.50 per mt, a 21 percent decline from the beginning of the year and a 38 percent decline from the 4-year average. Meanwhile, 241 new vessels have been delivered between January and April, and 177 vessels were sold for demolition, leading to a net gain of 64 vessels. According to a May 22 *Transportation and Export report* by O’Neil Commodity Consulting, Inc., 1,066 new dry bulk vessels are due for delivery this year—732 in 2016 and 184 in 2017. In addition, a large percentage (66.7 percent) of the global dry bulk fleet has been built only during the past 14 years. Some analysts are predicting that ocean rates will remain relatively low until 2017-18, while others are predicting that the current freight market situation will persist until 2020.

Diesel Fuel Prices Rise in Response to Crude Oil Increases

After a 7-month stretch of falling diesel fuel prices, rising crude oil prices have eroded some of the decreases in diesel prices enjoyed by farmers and shippers. The year began with deep decreases in January, when diesel prices fell by 38 cents. However, a slow rise began in February. A 5-week stretch of falling prices in March and April erased all of the increases in February plus some, resulting in a diesel price that was 19 cents per gallon lower than prices at the end of February. So far this year diesel prices are still down 30 cents per gallon compared to last year at this time. According to the Energy Information Administration (EIA) rising crude oil prices and several California refinery outages have contributed to the recent increases; some relief to prices is expected as the refinery outages are resolved this spring. The EIA expects diesel fuel prices to fall to an average of \$2.88 per gallon in 2015 and then rise to \$3.12 per gallon in 2016. GTRContactUs@ams.usda.gov

¹ As measured by down-bound tonnages at Mississippi River Locks 27, Ohio River Locks and Dam 52, and Arkansas River Lock and Dam 1. Data is provided by the U.S. Army Corps of Engineers

Grain Transportation Indicators

Table 1

Grain Transport Cost Indicators¹

Week ending	Truck	Rail		Barge	Ocean	
		Unit Train	Shuttle		Gulf	Pacific
05/27/15	196	248	200	204	135	117
05/20/15	195	244	202	211	134	115

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	5/22/2015	5/15/2015
Corn	IL--Gulf	-0.71	-0.76
Corn	NE--Gulf	-0.72	-0.78
Soybean	IA--Gulf	-1.13	-1.20
HRW	KS--Gulf	-1.11	-1.05
HRS	ND--Portland	-2.27	-2.27

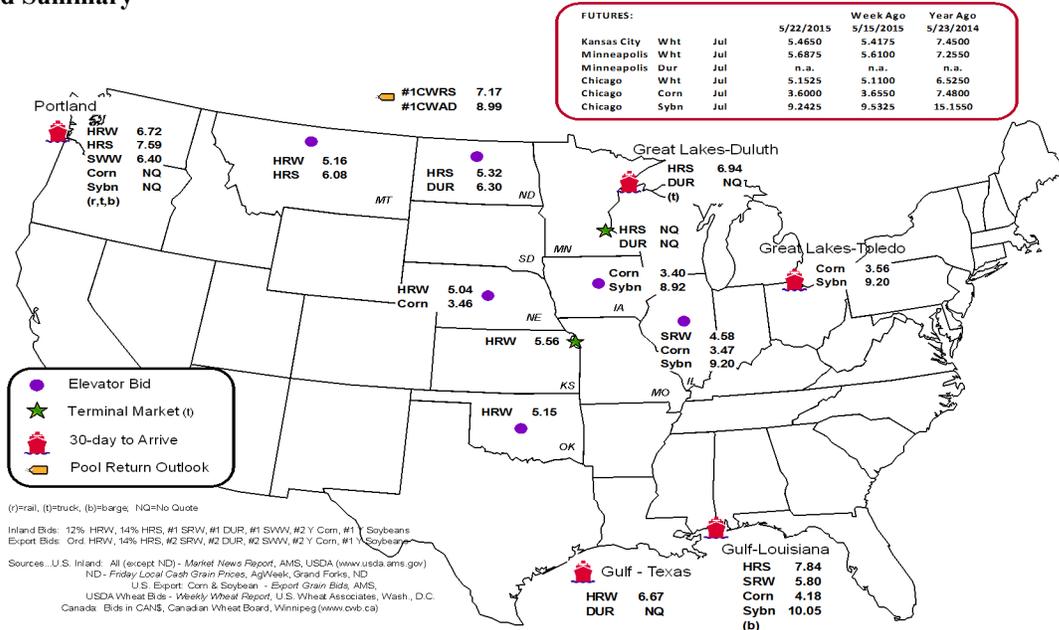
Note: nq = no quote

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		Pacific	Atlantic &	Total	Week ending	Cross-Border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
5/20/2015 ^p	213	987	3,144	409	4,753	5/16/2015	1,796
5/13/2015 ^r	228	1,472	2,076	277	4,053	5/9/2015	1,852
2015 YTD ^f	10,556	28,743	98,034	12,051	149,384	2015 YTD	33,894
2014 YTD ^f	19,910	34,393	101,432	14,689	170,424	2014 YTD	37,204
2015 YTD as % of 2014 YTD	53	84	97	82	88	% change YTD	91
Last 4 weeks as % of 2014 ²	39	78	56	94	62	Last 4wks % 2014	79
Last 4 weeks as % of 4-year avg. ²	72	99	79	104	86	Last 4wks % 4 yr	91
Total 2014	44,621	83,674	256,670	32,107	417,072	Total 2014	96,467
Total 2013	31,646	71,388	168,826	25,176	297,036	Total 2013	71,397

¹ Data is incomplete as it is voluntarily provided

² Compared with same 4-weeks in 2013 and prior 4-year average.

³ Cross-border weekly data is approximately 15 percent below the Association of American Railroads reported weekly carloads received by Mexican railroads to reflect switching between KCSM and FerroMex.

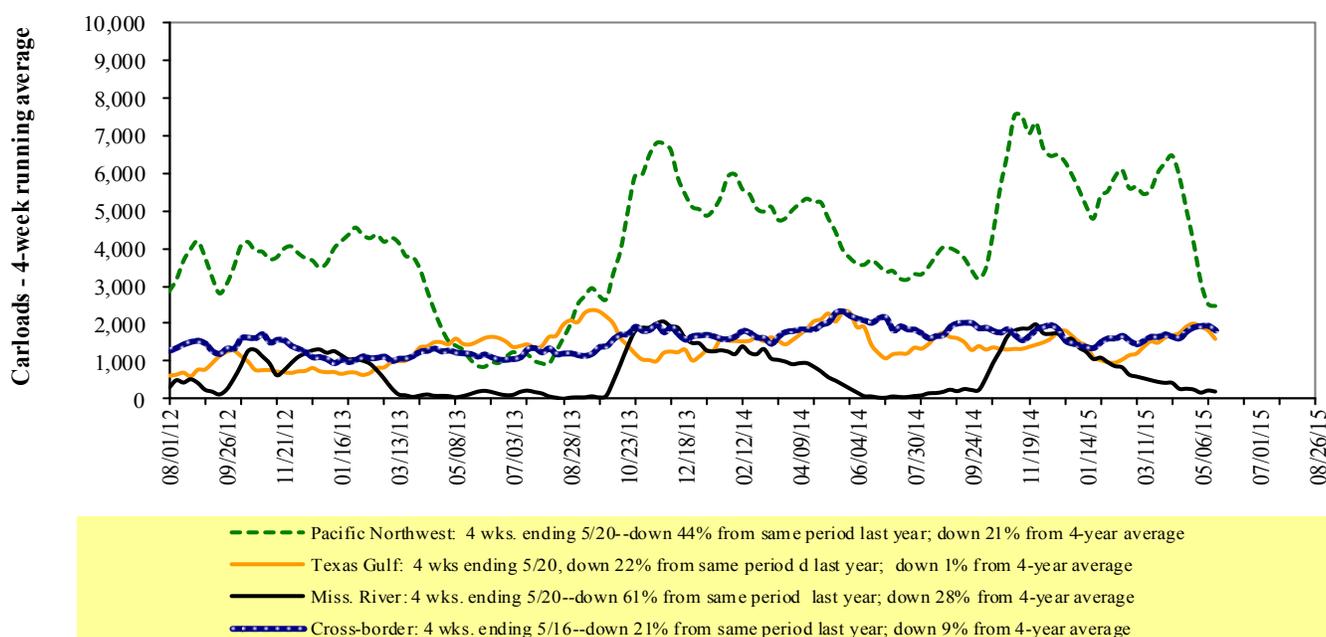
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available

Source: Transportation & Marketing Programs/AMS/USDA

Railroads originate approximately 29 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

Rail Deliveries to Port



Source: Transportation & Marketing Programs/AMS/USDA

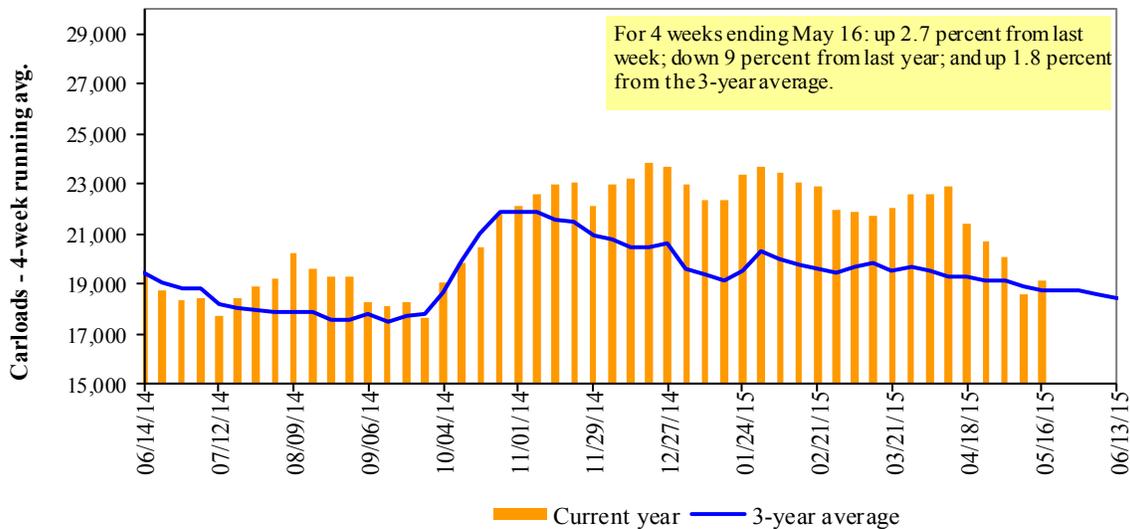
Table 4

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

Week ending	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
05/16/15	2,148	3,419	9,151	1,101	4,347	20,166	4,193	4,821
This week last year	2,000	2,712	10,097	592	5,615	21,016	4,350	5,518
2015 YTD	40,053	58,557	196,907	16,333	100,375	412,225	79,399	82,143
2014 YTD	36,165	57,424	170,890	17,689	110,405	392,573	82,454	98,653
2015 YTD as % of 2014 YTD	111	102	115	92	91	105	96	83
Last 4 weeks as % of 2014 ¹	136	105	85	89	80	90	87	68
Last 4 weeks as % of 3-yr avg. ²	133	116	93	128	95	102	104	77
Total 2014	103,331	153,771	482,431	47,510	297,969	1,085,012	242,616	276,322

¹The past 4 weeks of this year as a percent of the same 4 weeks last year.

²The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date.

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							
	Jun-15	Jun-14	Jul-15	Jul-14	Aug-15	Aug-14	Sep-15	Sep-14
BNSF ³								
COT grain units	no bids	no offer	no bids	no offer	13	no offer	46	no offer
COT grain single-car ⁵	1	no offer	no bids	no offer	25	no offer	47 .. 61	no offer
UP ⁴								
GCAS/Region 1	no bids	no offer	no bids	no offer	no bids	no offer	n/a	n/a
GCAS/Region 2	no bids	no offer	no bids	no offer	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.

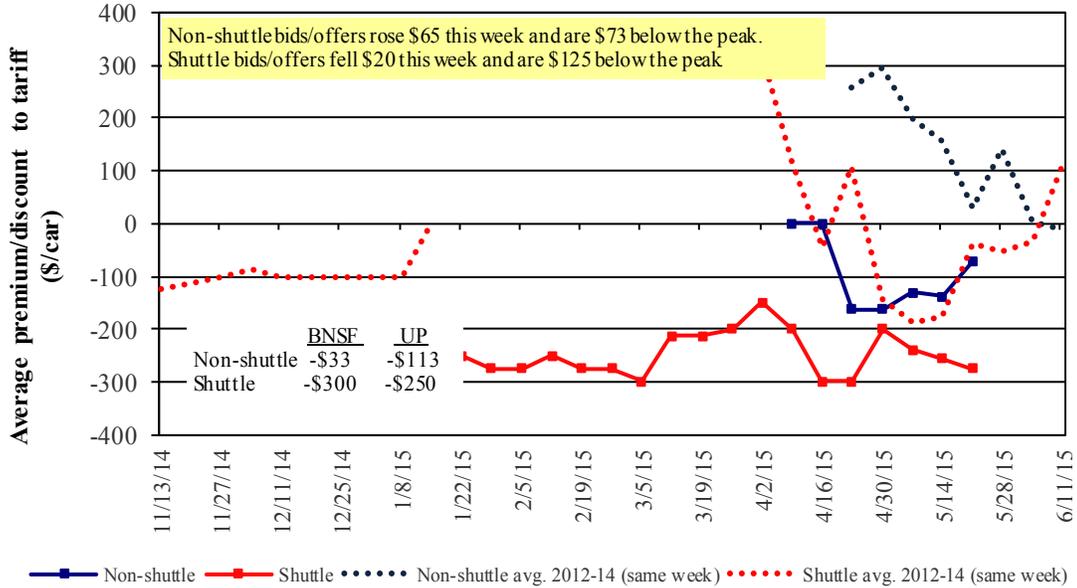
⁵Range is shown because average is not available. Not available = n/a.

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 June 2015, Secondary Market

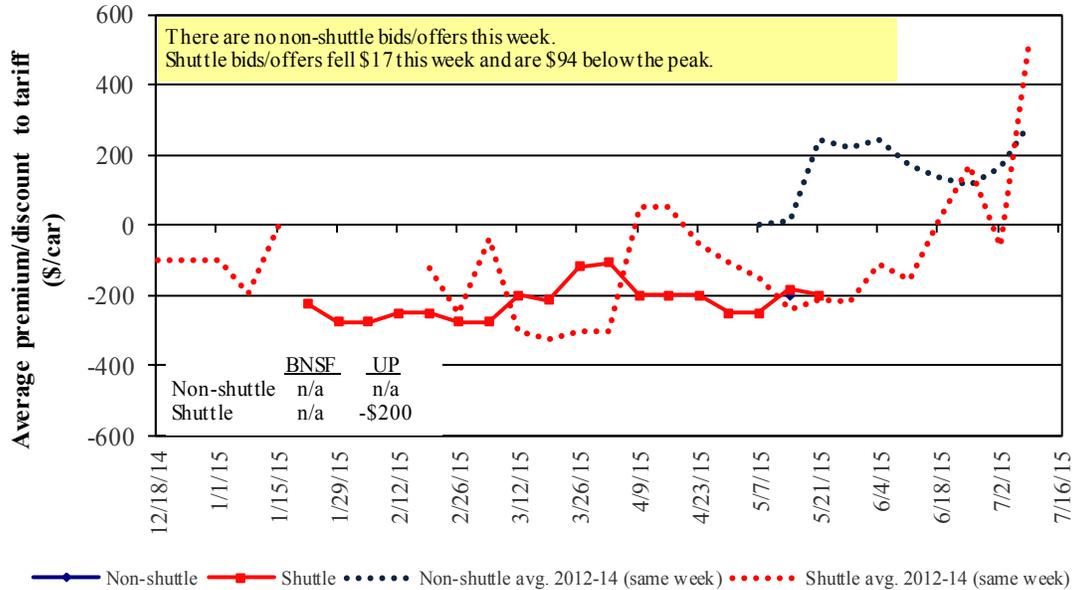


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 5

Bids/Offers for Railcars to be Delivered in July 2015, Secondary Market

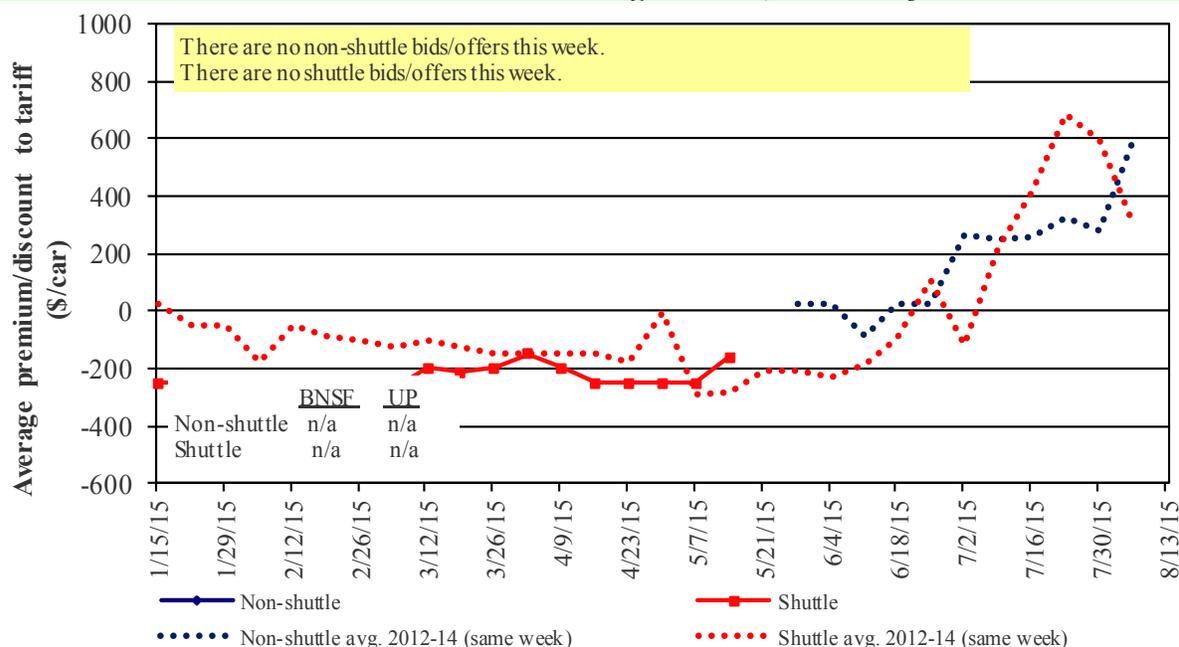


Non-shuttle bids include unit-train and single-car bids. n/a = not available.

Source: Transportation & Marketing Programs/AMS/USDA

Figure 6

Bids/Offers for Railcars to be Delivered in August 2015, 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					
	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15
Non-shuttle						
BNSF-GF	(33)	n/a	n/a	n/a	n/a	n/a
Change from last week	67	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	n/a	n/a	n/a	n/a	n/a	n/a
UP-Pool	(113)	n/a	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 2014	(188)	n/a	n/a	n/a	n/a	n/a
Shuttle²						
BNSF-GF	(300)	n/a	n/a	n/a	n/a	n/a
Change from last week	(42)	n/a	n/a	n/a	n/a	n/a
Change from same week 2014	(950)	n/a	n/a	n/a	n/a	n/a
UP-Pool	(250)	(200)	n/a	n/a	n/a	n/a
Change from last week	3	(8)	n/a	n/a	n/a	n/a
Change from same week 2014	(50)	n/a	n/a	n/a	n/a	n/a

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

²Shuttle 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 James B. Joiner Co., Tradewest Brokerage Co.

The **tariff rail rate** is the base price of freight rail service, and together with **fuel surcharges** and any **auction and secondary rail** values constitute the full cost of shipping by rail. Typically, auction and secondary rail values are a small fraction of the full cost of shipping by rail relative to the tariff rate. High auction and secondary rail values, during times of high rail demand or short supply, can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

Tariff Rail Rates for Unit and Shuttle Train Shipments¹

Effective date:		Origin region*	Destination region*	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ³
5/1/2015	metric ton					bushel ²		
Unit train								
Wheat	Wichita, KS	St. Louis, MO	\$3,387	\$81	\$34.44	\$0.94	2	
	Grand Forks, ND	Duluth-Superior, MN	\$4,143	\$30	\$41.44	\$1.13	12	
	Wichita, KS	Los Angeles, CA	\$6,950	\$153	\$70.54	\$1.92	4	
	Wichita, KS	New Orleans, LA	\$4,026	\$142	\$41.39	\$1.13	0	
	Sioux Falls, SD	Galveston-Houston, TX	\$6,486	\$126	\$65.66	\$1.79	5	
	Northwest KS	Galveston-Houston, TX	\$4,293	\$156	\$44.18	\$1.20	0	
	Amarillo, TX	Los Angeles, CA	\$4,492	\$217	\$46.76	\$1.27	-2	
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,328	\$161	\$34.65	\$0.88	-3	
	Toledo, OH	Raleigh, NC	\$5,555	\$199	\$57.14	\$1.45	12	
	Des Moines, IA	Davenport, IA	\$2,168	\$34	\$21.87	\$0.56	2	
	Indianapolis, IN	Atlanta, GA	\$4,761	\$150	\$48.76	\$1.24	12	
	Indianapolis, IN	Knoxville, TN	\$4,104	\$96	\$41.71	\$1.06	14	
	Des Moines, IA	Little Rock, AR	\$3,308	\$100	\$33.84	\$0.86	-2	
	Des Moines, IA	Los Angeles, CA	\$4,852	\$292	\$51.08	\$1.30	-13	
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,699	\$149	\$38.21	\$1.04	0	
	Toledo, OH	Huntsville, AL	\$4,676	\$141	\$47.84	\$1.30	20	
	Indianapolis, IN	Raleigh, NC	\$5,625	\$201	\$57.85	\$1.57	12	
	Indianapolis, IN	Huntsville, AL	\$4,368	\$96	\$44.33	\$1.21	24	
Champaign-Urbana, IL	New Orleans, LA	\$3,974	\$161	\$41.06	\$1.12	0		
Shuttle Train								
Wheat	Great Falls, MT	Portland, OR	\$3,953	\$88	\$40.13	\$1.09	1	
	Wichita, KS	Galveston-Houston, TX	\$3,919	\$69	\$39.60	\$1.08	-2	
	Chicago, IL	Albany, NY	\$4,723	\$187	\$48.76	\$1.33	13	
	Grand Forks, ND	Portland, OR	\$5,611	\$152	\$57.23	\$1.56	0	
	Grand Forks, ND	Galveston-Houston, TX	\$6,532	\$158	\$66.44	\$1.81	0	
	Northwest KS	Portland, OR	\$5,260	\$256	\$54.77	\$1.49	-3	
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$185	\$53.28	\$1.35	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,130	\$170	\$52.63	\$1.34	-5	
	Champaign-Urbana, IL	New Orleans, LA	\$3,147	\$161	\$32.85	\$0.83	-3	
	Lincoln, NE	Galveston-Houston, TX	\$3,610	\$99	\$36.83	\$0.94	-5	
	Des Moines, IA	Amarillo, TX	\$3,690	\$126	\$37.89	\$0.96	-2	
	Minneapolis, MN	Tacoma, WA	\$5,180	\$184	\$53.26	\$1.35	-6	
	Council Bluffs, IA	Stockton, CA	\$4,600	\$190	\$47.57	\$1.21	-6	
	Sioux Falls, SD	Tacoma, WA	\$5,690	\$170	\$58.19	\$1.58	-5	
Soybeans	Minneapolis, MN	Portland, OR	\$5,710	\$185	\$58.54	\$1.59	-5	
	Fargo, ND	Tacoma, WA	\$5,580	\$151	\$56.91	\$1.55	-5	
	Council Bluffs, IA	New Orleans, LA	\$4,425	\$186	\$45.79	\$1.25	0	
	Toledo, OH	Huntsville, AL	\$3,851	\$141	\$39.65	\$1.08	26	
	Grand Island, NE	Portland, OR	\$5,360	\$262	\$55.83	\$1.52	-2	

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 surcharge

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

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

Table 8

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

Effective date: 5/1/2015

Commodity	Origin state	Destination region	Tariff rate/car ¹	Fuel	Tariff plus surcharge per:		Percent change Y/Y ⁴
				surcharge per car ²	metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,599	\$161	\$79.29	\$2.16	11
	OK	Cuautitlan, EM	\$6,605	\$195	\$69.48	\$1.89	-1
	KS	Guadalajara, JA	\$7,050	\$189	\$73.96	\$2.01	-3
	TX	Salinas Victoria, NL	\$4,014	\$74	\$41.76	\$1.14	2
Corn	IA	Guadalajara, JA	\$8,427	\$222	\$88.37	\$2.24	-2
	SD	Celaya, GJ	\$7,780	\$210	\$81.64	\$2.07	-6
	NE	Queretaro, QA	\$7,618	\$197	\$79.86	\$2.03	-4
	SD	Salinas Victoria, NL	\$6,035	\$160	\$63.30	\$1.61	-5
	MO	Tlalnepantla, EM	\$6,963	\$192	\$73.11	\$1.86	-5
	SD	Torreon, CU	\$7,050	\$176	\$73.83	\$1.87	-2
Soybeans	MO	Bojay (Tula), HG	\$8,365	\$187	\$87.38	\$2.38	0
	NE	Guadalajara, JA	\$8,929	\$214	\$93.42	\$2.54	-1
	IA	El Castillo, JA	\$9,270	\$209	\$96.85	\$2.63	-2
	KS	Torreon, CU	\$7,226	\$133	\$75.19	\$2.04	0
Sorghum	TX	Guadalajara, JA	\$7,150	\$137	\$74.45	\$1.89	-2
	NE	Celaya, GJ	\$7,404	\$191	\$77.60	\$1.97	-4
	KS	Queretaro, QA	\$7,255	\$120	\$75.35	\$1.91	4
	NE	Salinas Victoria, NL	\$5,883	\$141	\$61.54	\$1.56	2
	NE	Torreon, CU	\$6,662	\$157	\$69.67	\$1.77	0

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

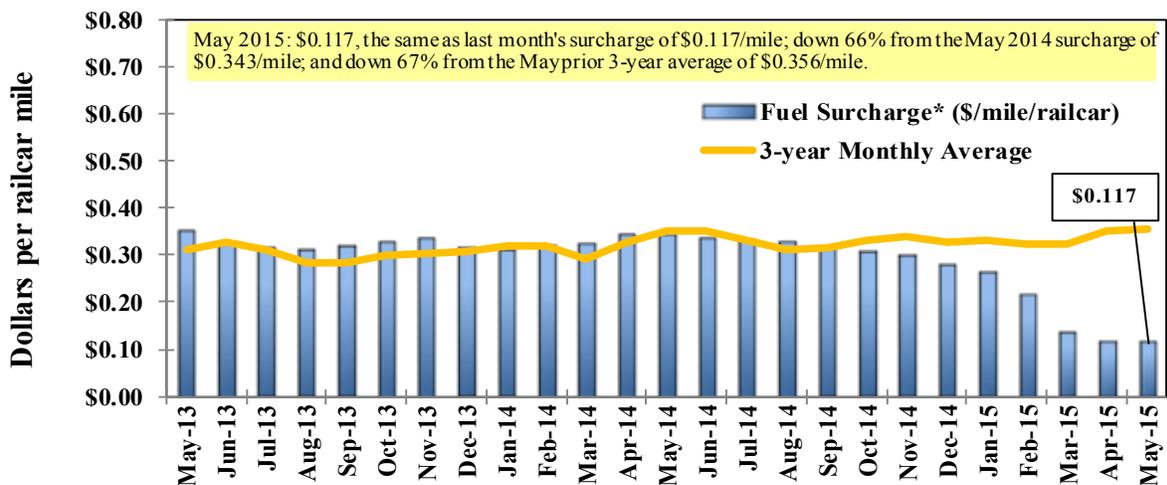
³Approximate load per car = 97.87 metric tons: Corn & Sorghum 56 lbs/bu, Wheat & Soybeans 60 lbs/bu

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

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.

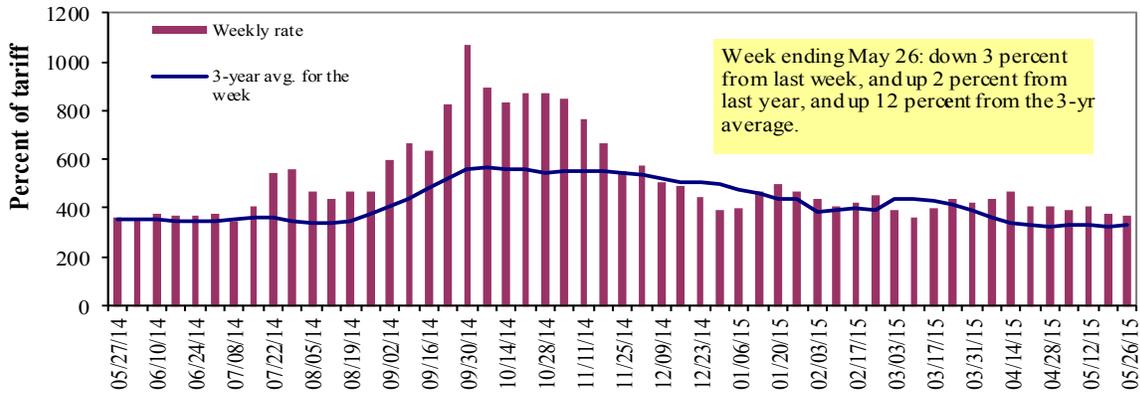
** BNSF strike price (diesel price when fuel surcharges begin) changed from \$1.25/gal. to \$2.50/gal starting March 1, 2011. As a result, the weighted average fuel surcharge for March 2011 was \$0.227/mile instead of \$0.331/mile.

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}



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	5/26/2015	427	370	368	247	227	227	220
	5/19/2015	445	390	380	255	240	240	225
\$/ton	5/26/2015	26.43	19.68	17.08	9.86	10.65	9.17	6.91
	5/19/2015	27.55	20.75	17.63	10.17	11.26	9.70	7.07
Current week % change from the same week:								
	Last year	-4	3	2	3	-2	-2	10
	3-year avg. ²	3	10	12	5	-4	-4	12
Rate¹	June	407	363	363	243	232	232	222
	August	428	427	427	385	415	415	362

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average; ton = 2,000 pounds
Source: Transportation & Marketing Programs/AMS/USDA

Figure 9 Benchmark tariff rates

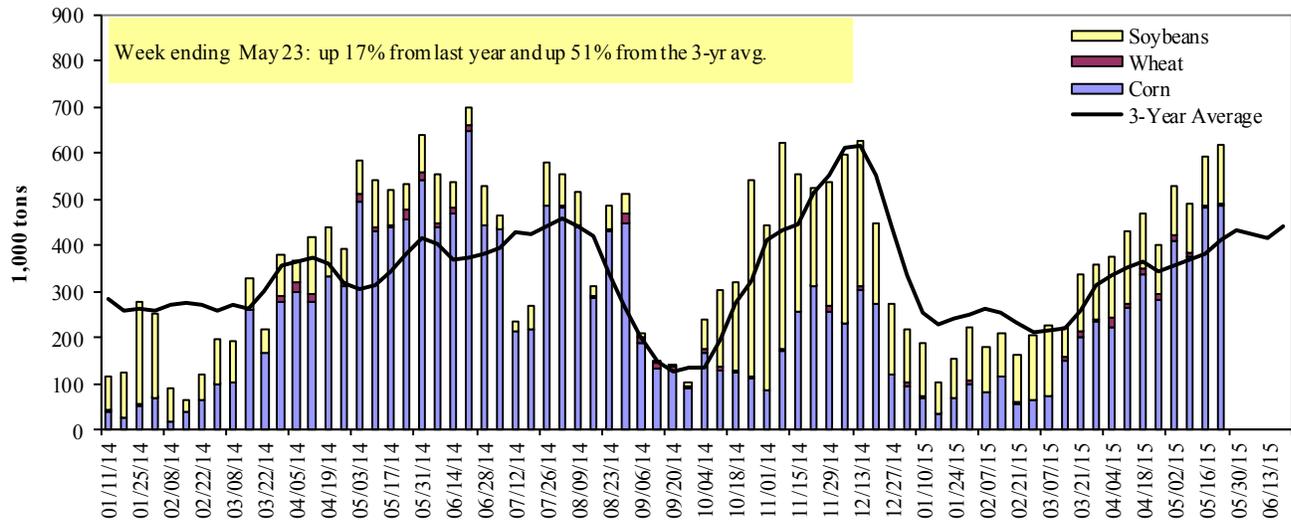
Calculating barge rate per ton:
(Rate * 1976 tariff benchmark rate per ton)/100

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



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 05/23/2015	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	171	5	84	0	261
Winfield, MO (L25)	296	8	94	3	401
Alton, IL (L26)	438	5	140	3	585
Granite City, IL (L27)	485	5	130	3	623
Illinois River (L8)	168	8	21	0	197
Ohio River (L52)	166	6	38	0	210
Arkansas River (L1)	0	0	0	0	0
Weekly total - 2015	651	11	168	3	833
Weekly total - 2014	569	29	58	8	663
2015 YTD ¹	7,507	552	4,423	92	12,574
2014 YTD	8,167	754	3,887	72	12,880
2015 as % of 2014 YTD	92	73	114	127	98
Last 4 weeks as % of 2014 ²	105	60	175	90	110
Total 2014	20,693	2,181	11,813	258	34,946

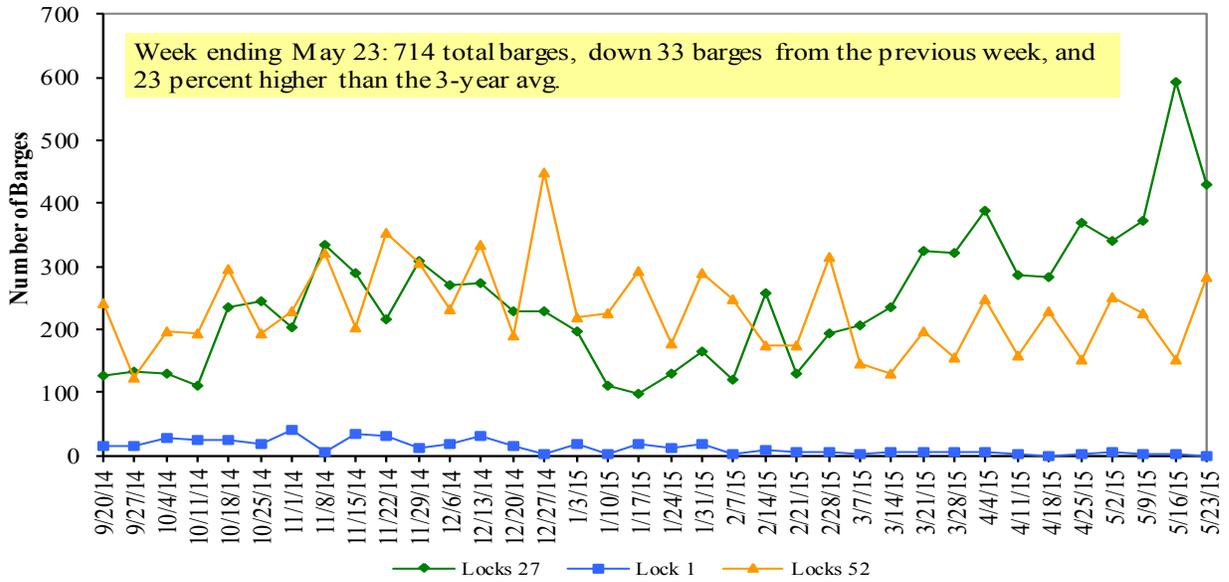
¹ Weekly total, YTD (year-to-date) and calendar year total includes Miss/27, Ohio/52, and Ark/1; "Other" refers to oats, barley, sorghum, and rye.

² As a percent of same period in 2014.

Note: Total may not add exactly, due to rounding

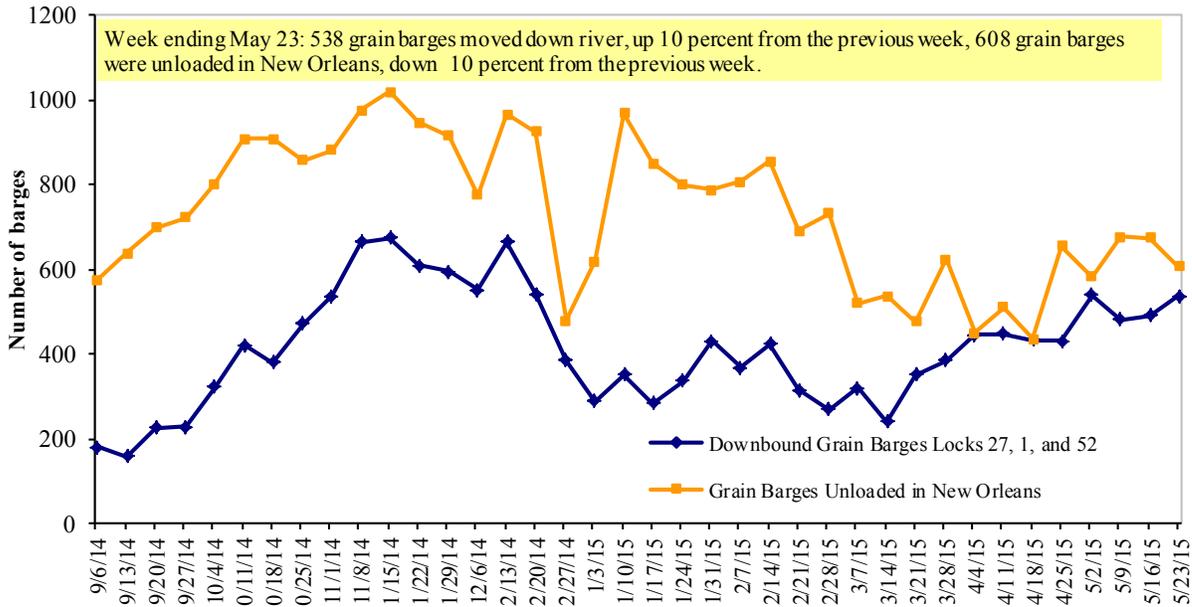
Source: U.S. Army Corps of Engineers

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 05/25/2014 (US \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.014	0.007	-1.008
	New England	3.101	0.008	-1.029
	Central Atlantic	3.162	0.004	-0.965
	Lower Atlantic	2.884	0.009	-1.032
II	Midwest ²	2.800	0.009	-1.084
III	Gulf Coast ³	2.803	0.010	-0.980
IV	Rocky Mountain	2.830	0.017	-1.116
V	West Coast	3.174	0.012	-0.853
	West Coast less California	3.057	0.024	-0.872
	California	3.269	0.001	-0.840
Total	U.S.	2.914	0.010	-1.011

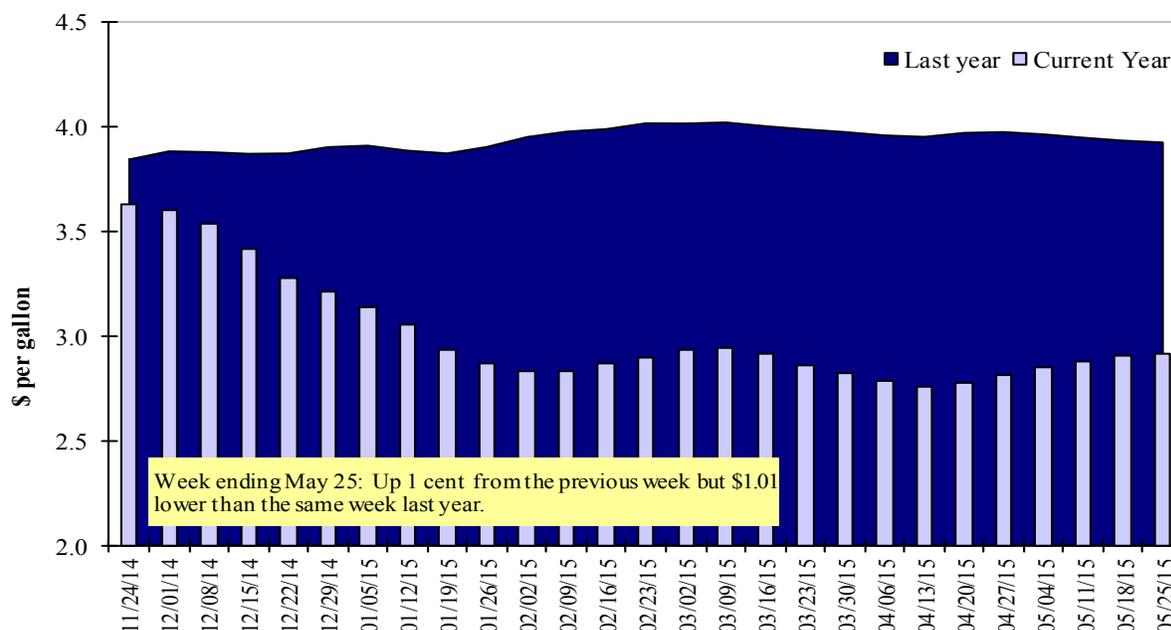
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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									
5/14/2015	569	313	595	305	51	1,833	12,175	3,602	17,610
This week year ago	896	399	1,002	466	85	2,848	13,576	2,276	18,700
Cumulative exports-marketing year²									
2014/15 YTD	6,768	3,490	6,909	3,622	647	21,435	30,166	46,112	97,713
2013/14 YTD	11,102	7,162	6,121	4,111	447	28,942	31,444	42,596	102,982
YTD 2014/15 as % of 2013/14	61	49	113	88	145	74	96	108	95
Last 4 wks as % of same period 2013/14	81	91	73	82	63	79	94	163	100
2013/14 Total	11,465	7,307	6,338	4,367	486	29,963	46,868	44,478	121,309
2012/13 Total	10,019	5,039	5,825	4,619	591	26,093	17,980	36,220	80,293

¹ Current unshipped export sales to date

² Shipped export sales to date; new marketing year 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 Importers¹ of U.S. Corn

Week ending 05/14/2015	Total Commitments ²			% change current MY from last MY	Exports ³ 3-year avg 2011-2013
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	691	9,923	9,954	(0)	10,079
Mexico	975	9,901	9,808	1	8,145
Korea	0	3,005	3,777	(20)	2,965
Colombia	6	3,832	2,892	32	3,461
Taiwan	0	1,823	1,688	8	1,238
Top 5 Importers	1,672	28,484	28,119	1	25,887
Total US corn export sales	2,278	42,341	45,020	(6)	34,445
% of Projected	5%	91%	92%		
Change from prior week	81	813	508		
Top 5 importers' share of U.S. corn export sales	73%	67%	62%		75%
USDA forecast, May 2015	48,260	46,360	48,700	(5)	
Corn Use for Ethanol USDA forecast, May 2015	132,080	132,080	130,404	1	

(n) indicates negative number.

¹ Based on FAS Marketing Year Ranking Reports - www.fas.usda.gov; Marketing year (MY) = Sep 1 - Aug 31.

² Cumulative Exports (shipped) + Outstanding Sales (unshipped), FAS Weekly Export Sales Report, or Export Sales Query--
<http://www.fas.usda.gov/esrquery/>

³ FAS Marketing Year Ranking Reports - <http://apps.fas.usda.gov/export-sales/myrkaug.htm>; 3-yr average

Table 14

Top 5 Importers¹ of U.S. Soybeans

Week Ending 05/14/2015	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg. 2011-13
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
China	2,309	29,896	27,597	8	24,211
Mexico	272	3,149	3,107	1	2,971
Indonesia	0	1,619	2,186	(26)	1,895
Japan	150	1,726	1,777	(3)	1,750
Taiwan	3	1,167	1,107	5	1,055
Top 5 importers	2,734	37,557	35,774	5	31,882
Total US soybean export sales	4,490	49,713	44,872	11	39,169
% of Projected		101%	100%		
Change from prior week	78	165	164		
Top 5 importers' share of U.S. soybean export sales	61%	76%	80%		81%
USDA forecast, May 2015	48,310	48,990	44,820	9	

(n) indicates negative number.

¹Based on FAS 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/³ FAS 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 05/14/2015	Total Commitments ²			% change current MY from last MY	Exports ³ 3-yr avg 2011-2013
	2015/16 Next MY	2014/15 Current MY	2013/14 Last MY		
	- 1,000 mt -				- 1,000 mt -
Japan	50	3,141	3,078	2	3,243
Mexico	198	2,719	3,100	(12)	3,066
Nigeria	234	2,084	2,676	(22)	2,960
Philippines	284	2,424	2,161	12	2,006
China	119	385	4,272	(91)	1,830
Brazil	85	1,534	4,294	(64)	1,617
Korea	284	1,179	1,328	(11)	1,552
Taiwan	86	1,000	1,079	(7)	969
Indonesia	10	635	1,141	(44)	813
Colombia	79	583	763	(24)	610
Top 10 importers	1,430	15,682	23,891	(34)	18,665
Total US wheat export sales	3,170	23,268	31,790	(27)	27,696
% of Projected	13%	99%	99%		
Change from prior week*	128	74	142		
Top 10 importers' share of U.S. wheat export sales	45%	67%	75%		67%
USDA forecast, May 2015	25,170	23,410	32,010	(27)	

(n) indicates negative number.

¹Based on FAS 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/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 05/21/15	Previous Week ¹	Current Week as % of Previous	2015 YTD ¹	2014 YTD ¹	2015 YTD as % of 2014 YTD	Last 4-weeks as % of		Total ¹ 2014
							2014	3-yr. avg.	
Pacific Northwest									
Wheat	212	159	134	4,513	5,126	88	48	61	12,436
Corn	61	202	30	3,784	3,229	117	48	91	7,781
Soybeans	0	9	0	4,043	4,471	90	103	4	12,887
Total	274	370	74	12,339	12,826	96	48	63	33,104
Mississippi Gulf									
Wheat	168	77	218	1,663	1,740	96	138	85	4,495
Corn	790	680	116	11,850	13,126	90	110	174	30,912
Soybeans	241	221	109	9,938	9,728	102	163	199	29,087
Total	1,199	978	123	23,450	24,594	95	119	161	64,495
Texas Gulf									
Wheat	32	77	42	1,574	2,708	58	41	43	6,120
Corn	0	32	0	236	215	110	107	77	580
Soybeans	0	0	n/a	182	257	71	0	0	949
Total	32	110	30	1,992	3,181	63	43	45	7,649
Interior									
Wheat	3	5	64	502	514	98	51	53	1,400
Corn	107	155	69	2,317	2,129	109	60	115	5,677
Soybeans	58	58	99	1,473	1,758	84	93	94	4,312
Total	168	218	77	4,293	4,400	98	45	100	11,389
Great Lakes									
Wheat	23	25	94	187	100	187	135	130	935
Corn	0	0	n/a	89	22	404	63	101	288
Soybeans	11	41	27	89	30	296	276	570	988
Total	34	65	52	365	152	240	153	175	2,211
Atlantic									
Wheat	2	1	157	219	76	288	22	7	553
Corn	5	5	104	55	263	21	14	58	816
Soybeans	4	28	15	859	975	88	230	218	2,119
Total	12	34	35	1,133	1,314	86	51	61	3,487
U.S. total from ports²									
Wheat	440	344	128	8,657	10,263	84	60	62	25,939
Corn	964	1,074	90	18,331	18,983	97	93	145	46,054
Soybeans	314	356	88	16,584	17,220	96	146	128	50,342
Total	1,719	1,775	97	43,572	46,466	94	87	110	122,335

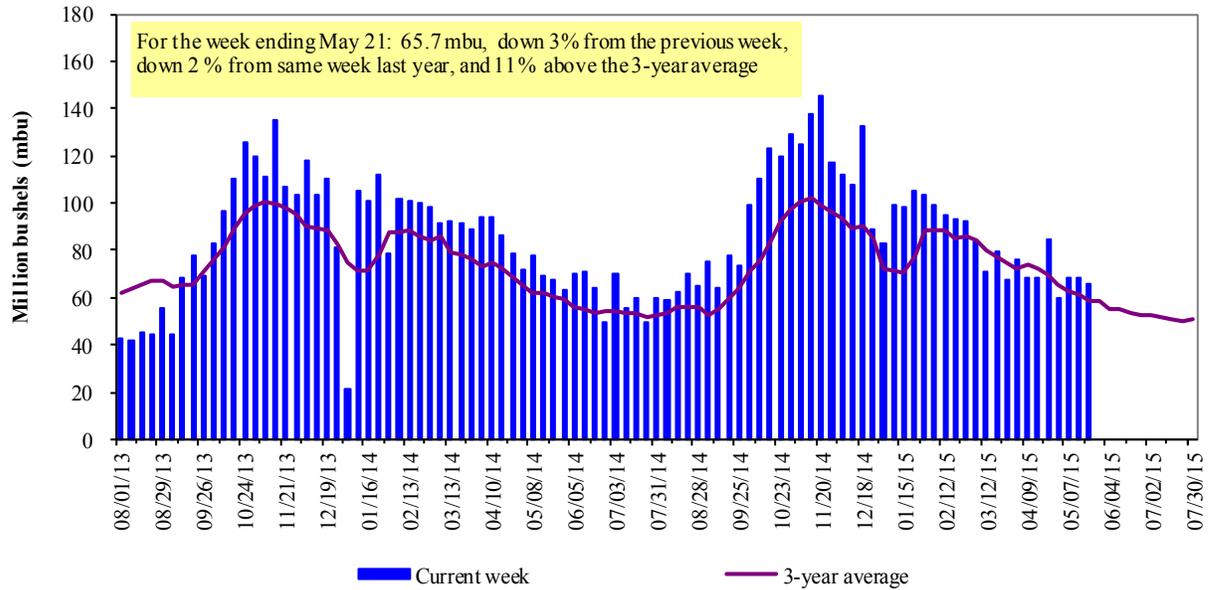
¹ Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 2014.

Figure 14

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

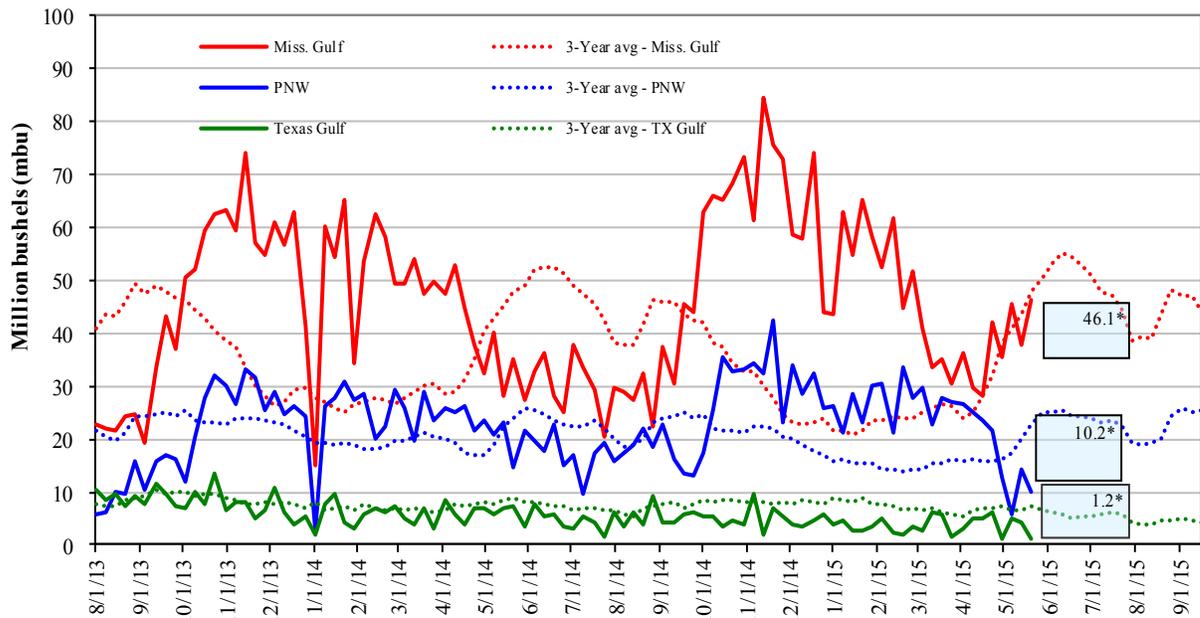


Source: Grain Inspection, Packers and Stockyards Administration/USDA (www.gipsa.usda.gov)

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.

May 21: % change from:	MSGulf	TX Gulf	U.S. Gulf	PNW
Last week	up 22	down 71	up 13	down 28
Last year (same week)	up 31	down 84	up 11	down 30
3-yr avg. (4-wk mov. avg.)	up 81	down 82	up 48	down 24

Ocean Transportation

Table 17

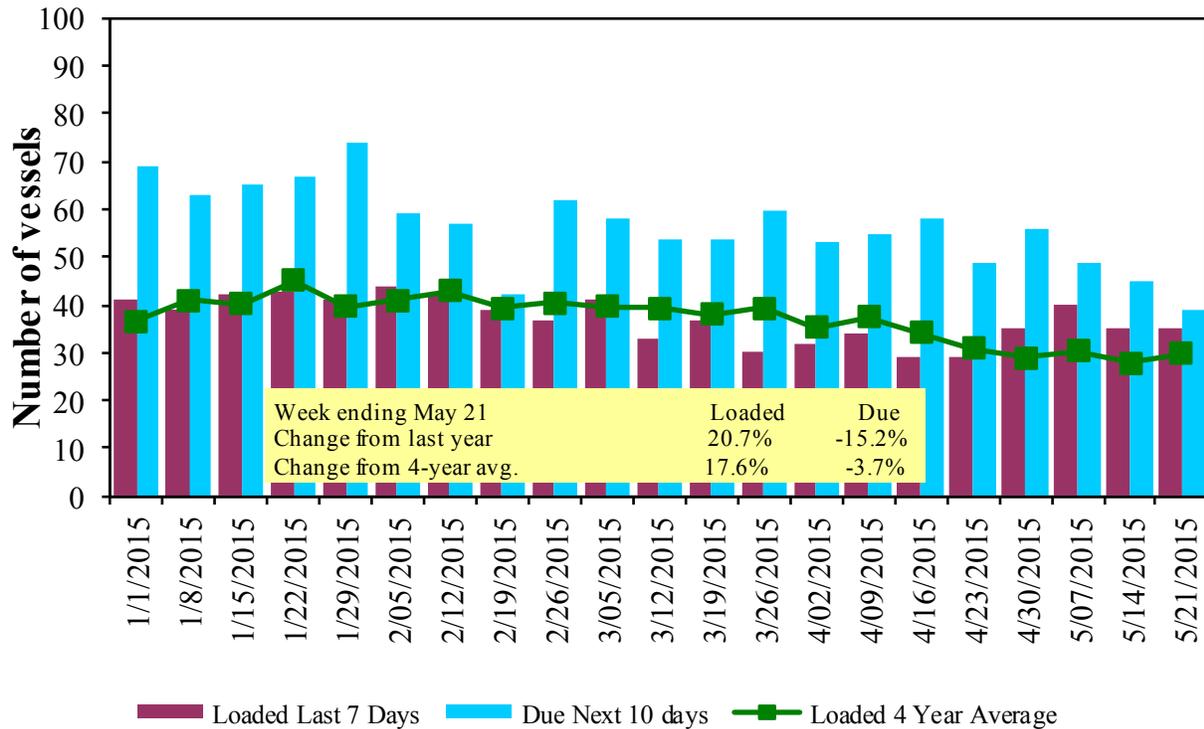
Weekly Port Region Grain Ocean Vessel Activity (number of vessels)

Date	Gulf			Pacific Northwest	Vancouver B.C.
	In port	Loaded 7-days	Due next 10-days	In port	In port
5/21/2015	42	35	39	6	n/a
5/14/2015	45	35	45	4	n/a
2014 range	(18..88)	(24..52)	(27..97)	(6..26)	n/a
2014 avg.	46	39	59	15	n/a

Source: Transportation & Marketing Programs/AMS/USDA

Figure 16

U.S. Gulf¹ Vessel Loading Activity

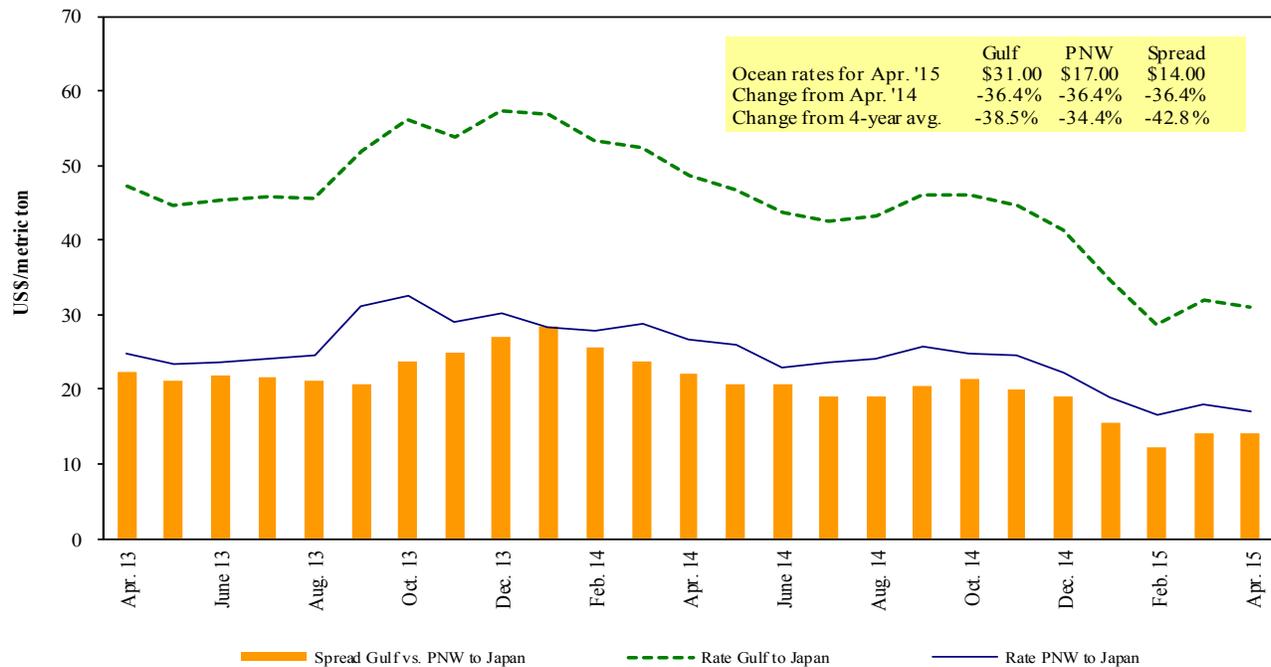


Source: Transportation & Marketing Programs/AMS/USDA

¹U.S. Gulf includes Mississippi, Texas, and East Gulf.

Figure 17

Grain Vessel Rates, U.S. to Japan



Data Source: O'Neil Commodity Consulting

Table 18

Ocean Freight Rates For Selected Shipments, Week Ending 5/23/2015

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Grain	Jun 1/10	50,000	35.75
U.S. Gulf	El Salvador ¹	Wheat	May 2/Jun 1	18,700	85.02
PNW	China	Heavy Grain	Jun 1/10	60,000	14.00
Brazil	China	Heavy Grain	Jun 20/30	60,000	21.75
Brazil	China	Heavy Grain	Jun 5/14	60,000	22.25
Brazil	China	Heavy Grain	May 25/Jun 5	60,000	23.00
Brazil	China	Heavy Grain	May 20/30	60,000	22.75
Brazil	China	Heavy Grain	Jun 1/30	60,000	22.75
Brazil	China	Heavy Grain	Jun 1/10	66,000	21.00
Brazil	China	Grain	Apr 15/May 31	60,000	24.50
Brazil	China	Grain	Jun 15/25	60,000	21.65
Brazil	Tunisia	Soybeans	May 23/28	30,000	18.00
Canada	China	Heavy Grain	Jun 1/10	60,000	14.00
France	China	Wheat	May 16/25	63,000	26.70
River Plate	China	Heavy Grain	May 20/29	60,000	28.25
River Plate	Romania	Soybean Meal	May 20/25	20,000	36.00
Russia	Kenya	Wheat	May 20/25	30,000	24.50
Ukraine	Iran	Grain	May 10/25	60,000	22.00

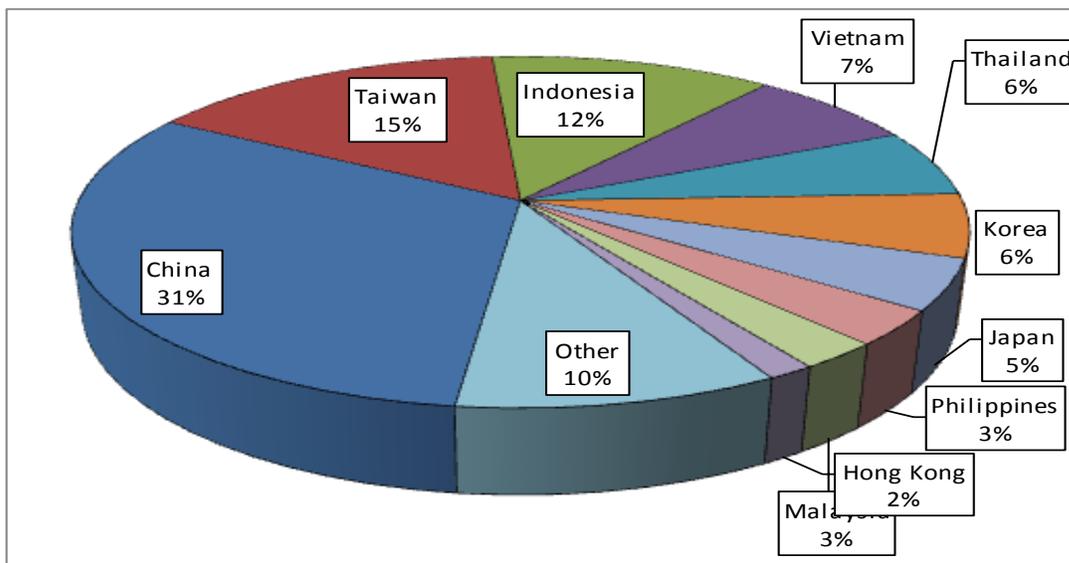
Rates shown are for metric ton (2,204.62 lbs. = 1 metric ton), F.O.B., except where otherwise indicates; op = option

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)

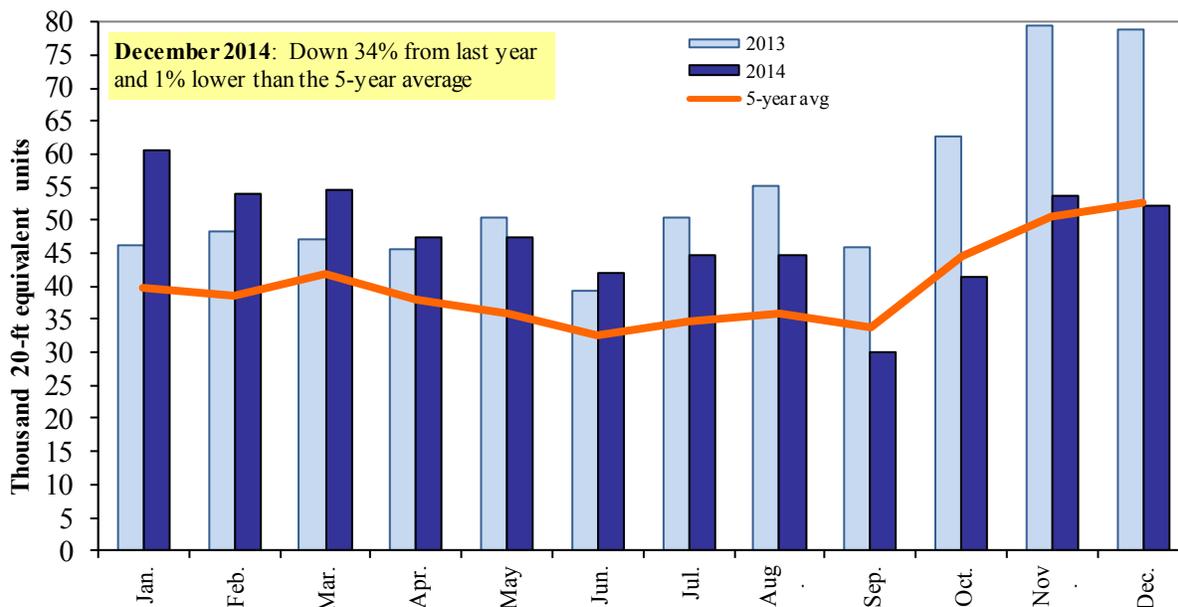
In 2013, containers were used to transport 10 percent of total U.S. waterborne grain exports, up 2 percentage points from 2012. Approximately 61 percent of U.S. waterborne grain exports in 2013 went to Asia, of which 16 percent were moved in containers. Asia is the top destination for U.S. containerized grain exports—97 percent in 2013.

Figure 18
Top 10 Destination Markets for U.S. Containerized Grain Exports, January-December 2014



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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