



# Grain Transportation Report

A weekly publication of the Agricultural Marketing Service  
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## WEEKLY HIGHLIGHTS

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### West Coast Longshore Union May Face Bankruptcy

The International Longshore and Warehouse Union (ILWU) has stated it may file for Chapter 11 bankruptcy protection. The announcement follows a Federal jury award of \$94 million in a lawsuit against ILWU—a sum far exceeding the union's \$20 million in declared assets. In a February 14 hearing, ILWU attorneys will try to convince U.S. District Judge Michael Simon to reduce the award. Currently, ILWU workers handle every shipping container crossing West Coast docks. As a result of this financial burden, employers hope ILWU will consider the implications of future work slowdowns and other transportation-disrupting tactics. In early January, SM Lines restored service to the Port of Portland where container movements have been dormant for 4 years. Approximately 63 percent U.S. containerized grain exports move through West Coast ports.

### President Signs United States-Mexico-Canada Trade Agreement

Signed by President Trump on January 29, the United States-Mexico-Canada Trade Agreement (USMCA) allows preferential market access for U.S. agricultural products, while reducing trade-distorting policies, increasing transparency, and ensuring nondiscriminatory treatment. Part of the agreement eliminates all tariffs on U.S. wheat exports to Mexico, one of the top U.S. export markets. The end of these tariffs should provide an opportunity for wheat exports to grow. In addition, U.S. wheat exports to Canada will receive reciprocal grading treatment and will not require a "country of origin" certificate on their quality grade or inspection certificate. This change will enhance the competitiveness of U.S. wheat growers along the U.S.-Canada border. The agreement could boost the demand for U.S. grain in both countries and consequently increase cross-border movements and rail deliveries to ports.

### Norfolk Southern Customers Add or Expand Rail-Served Facilities

On January 30, Norfolk Southern Railway (NS) announced it worked with 77 businesses across 16 States to open new or expand facilities on its rail lines in 2019. According to NS, these businesses invested nearly \$2 billion to develop 54 new rail-served commercial projects and expand 23 existing ones. NS estimates all of this activity will generate more than 1,160 customer jobs and more than 62,300 carloads of new rail traffic annually. A fertilizer facility in Aurora, NC, was among the largest development projects. In the past 10 years, NS has participated in locating or expanding 974 industrial facilities, which represent nearly \$62 billion in private investment.

## Snapshots by Sector

### Export Sales

For the week ending January 23, **unshipped balances** of wheat, corn, and soybeans totaled 22.5 million metric tons (mmt). This represented a 28-percent decrease in outstanding sales, compared to the same time last year. Net **corn export sales** reached 1.235 mmt, up 23 percent from the past week. Net **soybean export sales** were 0.470 mmt, down 41 percent from the previous week. Net weekly **wheat export sales** reached 0.646 mmt, down 7 percent from the previous week.

### Rail

U.S. Class I railroads originated 21,723 **grain carloads** during the week ending January 25. This was a 12-percent increase from the previous week, 1 percent more than last year, and 2 percent lower than the 3-year average.

Average February shuttle **secondary railcar** bids/offers (per car) were \$138 below tariff for the week ending January 30. This was \$229 less than last week and \$367 lower than this week last year. There were no non-shuttle bids/offers this week.

### Barge

For the week ending February 1, **barge grain movements** totaled 546,702 tons. This was a 16.4-percent increase from the previous week and 54 percent more than the same period last year.

For the week ending February 1, 335 grain barges **moved down river**—49 barges more than the previous week. There were 582 grain barges **unloaded in New Orleans**, 17 percent fewer than the previous week.

### Ocean

For the week ending January 30, 29 **oceangoing grain vessels** were loaded in the Gulf—14.7 percent fewer than same period last year. Within the next 10 days (starting January 31), 43 vessels were expected to be loaded—17.3 percent fewer than the same period last year.

As of January 30, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$45.00. This was 1 percent less than the previous week. The rate from the Pacific Northwest to Japan was \$24.25 per mt, 2 percent less than the previous week.

### Fuel

For the week ending February 3, the U.S. average **diesel fuel price** decreased 5.4 cents from the previous week to \$2.956 per gallon, 1.0 cent below the same week last year.

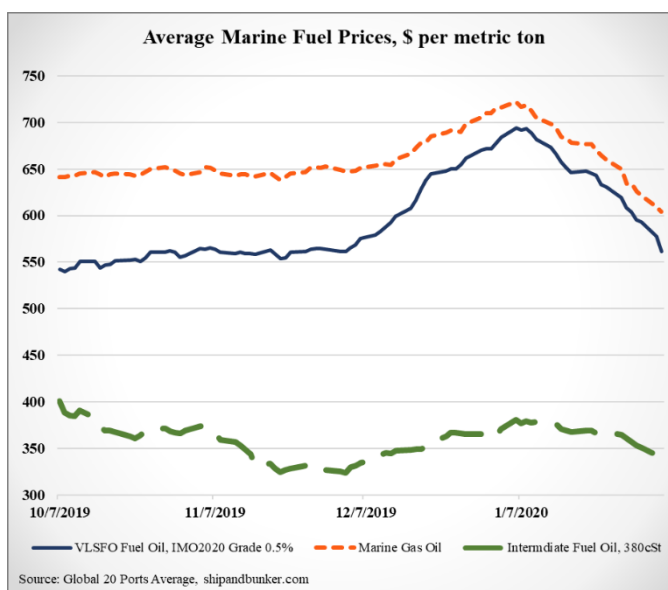
# Feature Article/Calendar

## Impact of IMO 2020 on Ocean Freight for Agricultural Exporters

On January 1, 2020, the International Maritime Organization (IMO) implemented IMO 2020—the toughest restriction to date on international sulfur emissions for all oceangoing vessels. It affects most U.S. agricultural exports, which move via oceangoing vessels. Shippers and ocean carriers (including bulk and container) are closely tracking the regulation’s effect on fuel costs, surcharges, overall freight rates, and competitiveness. This article explores market and industry responses as they have begun to adapt to IMO 2020.

**What is IMO 2020?** The IMO’s Annex VI of the International Convention for the Prevention of Pollution from Ships, commonly referred to as IMO 2020, mandates oceangoing vessels reduce sulfur emissions from marine fuel to a maximum 0.5 percent, by weight. Down from the previous maximum of 3.5 percent, the current reduction constitutes the single largest drop since IMO began tightening sulfur oxide emissions standards in 2005. The last mandate, in 2015, decreased sulfur emissions in designated emissions control areas (ECAs), from 1 percent to 0.1 percent. ECAs were established for major global ports, including coastal regions of the United States, Canada, and northern Europe. Some global media sources have called the new IMO 2020 mandate the biggest change in fuel regulations since the elimination of leaded gasoline.

**Marine fuel prices.** Market prices for very low sulfur fuel oils (VLSFO) became available in October 2019, as vessel operators began preparing and testing vessels with IMO 2020-compliant fuels. Early VLSFO market prices were well below the also-compliant marine gas oil (MGO) by 15 percent on average, but still far exceeded the non-compliant intermediate fuel oil (IFO) by 47 percent on average (see figure). By early December 2019, prices for all major marine fuels began to increase, and the new VLSFO market increased sharply as it narrowed to within 10 percent of the MGO price. By the January 1 deadline, VLSFO and MGO were within 5 percent of each other, or roughly \$38 per metric ton (mt).



After peaking within the first week of January, prices have fallen substantially for both compliant fuels—\$133 per mt for VLSFO and \$119 per mt for MGO as of February 4. Analysts attribute the decrease in prices to the coronavirus outbreak in China, as well as to the early Lunar New Year celebration, which began in late January. Both events affected passenger flight travel, as well as freight transportation demand, pressing oil prices and ocean freight rates downward.

**Industry impact.** In November and December 2019, anticipating the January 1 deadline, ocean container carriers imposed additional fuel surcharges to recover the rising cost of testing compliant fuel and slowly integrating it into regular vessel operations. As compliant-fuel prices peaked in early January, carriers responded by increasing fuel surcharges. Maersk, for example, announced a \$50 increase in its Bunker Adjustment Factor to \$200 per 40-ft container. However, as January progressed and lower freight and flight demand softened trade markets, some analysts reported shipping rates had not climbed as high as carriers had previously anticipated. In both bulk and container markets, spot ocean freight rates (with fuel surcharges included) were reportedly soft in the latter part of January. In some cases, the late January rates returned to levels seen earlier in 2019.

Carriers are concerned that although fuel prices have fallen since early January, the price of the compliant fuel remains significantly higher than the traditional IFO. Without an increase in rates (including fuel surcharges), carriers run the risk of not recouping the additional cost of the fuel during the first quarter. Shippers worry that when demand recovers carriers will significantly increase rates to recoup losses in January. [april.taylor@usda.gov](mailto:april.taylor@usda.gov)

# Grain Transportation Indicators

Table 1

## Grain transport cost indicators<sup>1</sup>

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
02/05/20	198	n/a	220	171	201	172
01/29/20	202	n/a	229	181	203	176

<sup>1</sup>Indicator: 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); ocean = routes to Japan (\$/metric ton); n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

## Market Update: U.S. origins to export position price spreads (\$/bushel)

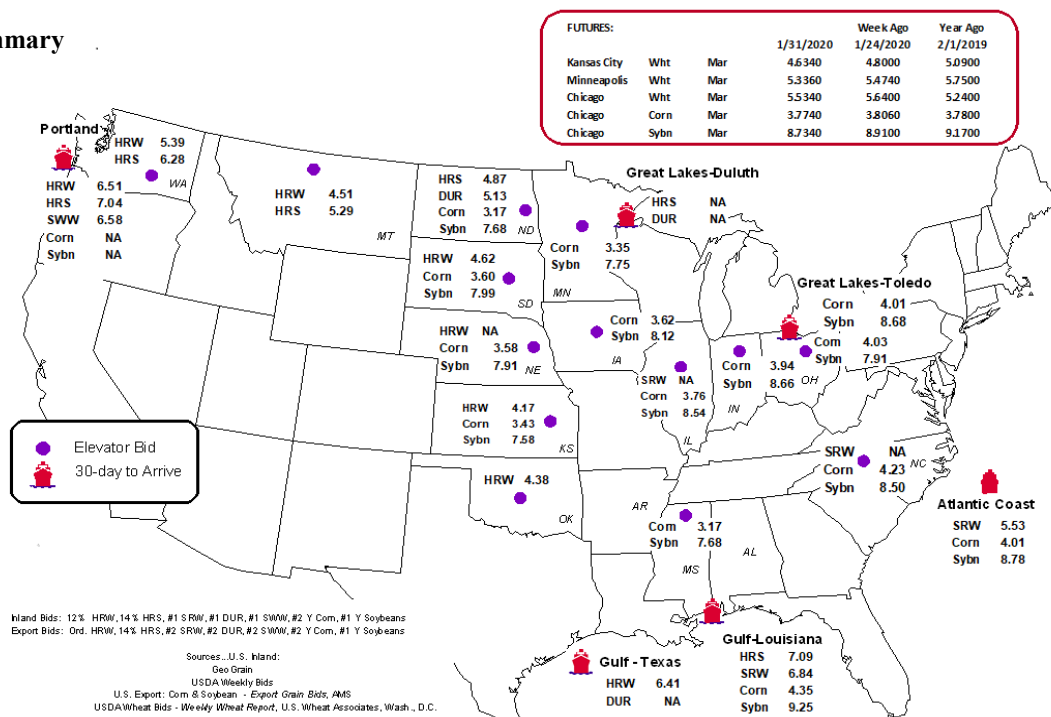
Commodity	Origin-destination	1/31/2020	1/24/2020
Corn	IL-Gulf	-0.59	-0.59
Corn	NE-Gulf	-0.77	-0.78
Soybean	IA-Gulf	-1.13	-1.17
HRW	KS-Gulf	-2.24	-2.21
HRS	ND-Portland	-2.17	-2.14

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.

Source: USDA, Agricultural Marketing Service.

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)<sup>1</sup>**

For the week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-border Mexico <sup>3</sup>
	Gulf	Texas Gulf	Northwest	East Gulf			
1/29/2020 <sup>p</sup>	653	645	4,023	29	5,350	1/25/2020	1,874
1/22/2020 <sup>r</sup>	566	793	3,020	182	4,561	1/18/2020	1,983
2020 YTD <sup>r</sup>	2,568	3,240	17,762	882	24,452	2020 YTD	8,842
2019 YTD <sup>r</sup>	2,126	3,807	26,414	2,353	34,700	2019 YTD	10,847
2020 YTD as % of 2019 YTD	121	85	67	37	70	% change YTD	82
Last 4 weeks as % of 2019 <sup>2</sup>	121	81	64	30	67	Last 4wks. % 2019	100
Last 4 weeks as % of 4-year avg. <sup>2</sup>	98	45	58	27	57	Last 4wks. % 4 yr.	115
Total 2019	40,974	51,167	251,181	16,192	359,514	Total 2019	127,622
Total 2018	22,118	46,532	310,449	21,432	400,531	Total 2018	129,674

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

<sup>2</sup> Compared with same 4-weeks in 2019 and prior 4-year average.

<sup>3</sup> 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 Kansas City Southern de Mexico (KCSM) and Grupo Mexico.

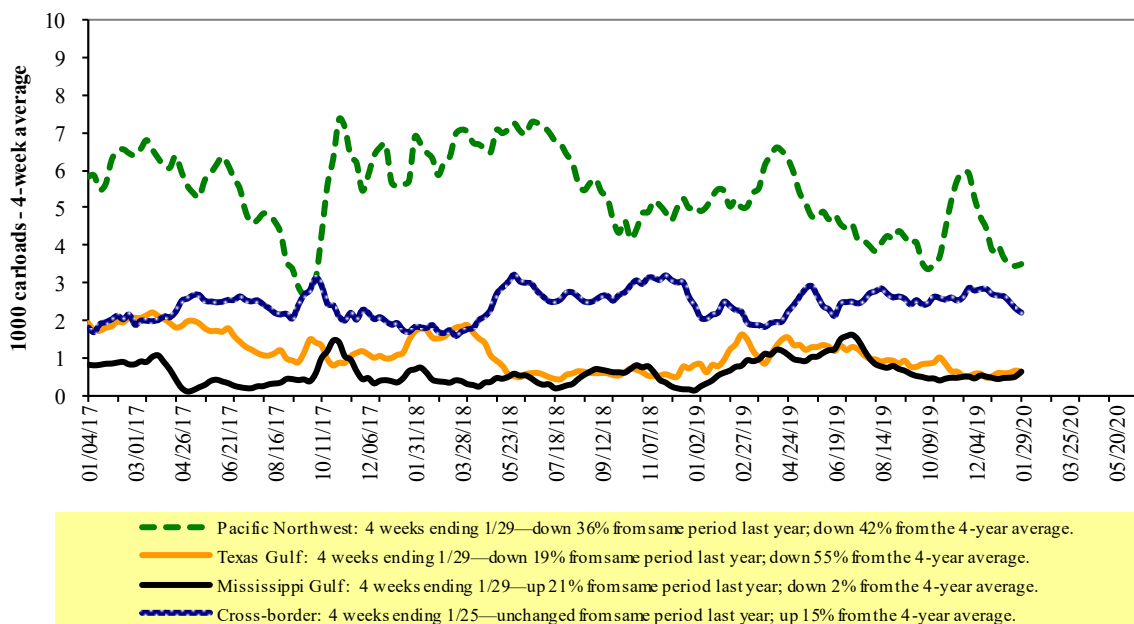
**YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.**

Source: USDA, Agricultural Marketing Service.

Railroads originate approximately 24 percent of U.S. grain shipments. Trends in these loadings are indicative of market conditions and expectations.

Figure 2

## Rail deliveries to port



Source: USDA, Agricultural Marketing Service.

Table 4

**Class I rail carrier grain car bulletin (grain carloads originated)**

For the week ending: 1/25/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,839	2,339	11,558	1,113	4,874	21,723	3,451	3,863
This week last year	1,399	2,207	11,386	1,027	5,415	21,434	3,720	4,202
2020 YTD	7,058	9,687	40,834	4,266	17,170	79,015	14,025	13,883
2019 YTD	7,510	11,289	45,442	4,213	21,169	89,623	14,959	17,232
2020 YTD as % of 2019 YTD	94	86	90	101	81	88	94	81
Last 4 weeks as % of 2019*	94	86	90	101	81	88	94	81
Last 4 weeks as % of 3-yr. avg.**	92	87	90	101	79	88	97	84
Total 2019	91,611	137,277	568,369	58,527	260,269	1,116,053	212,651	235,892

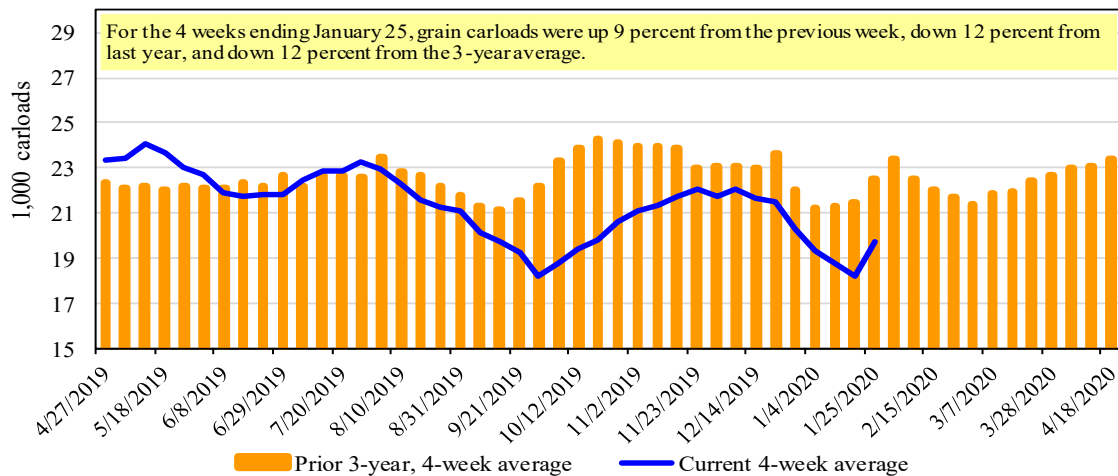
\*The past 4 weeks of this year as a percent of the same 4 weeks last year.

\*\*The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

Note: NS = Norfolk Southern; KCS = Kansas City Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific.

Source: Association of American Railroads.

Figure 3

**Total weekly U.S. Class I railroad grain carloads**

Source: Association of American Railroads.

Table 5

**Railcar auction offerings<sup>1</sup> (\$/car)<sup>2</sup>**

For the week ending: 1/30/2020		Delivery period							
		Feb-20	Feb-19	Mar-20	Mar-19	Apr-20	Apr-19	May-20	May-19
BNSF <sup>3</sup>	COT grain units	0	no bids	0	0	no bid	no bids	no bid	no bids
	COT grain single-car	32	0	0	0	0	0	0	0
UP <sup>4</sup>	GCAS/Region 1	no offer	no offer	no offer	no bid	no offer	no bid	n/a	n/a
	GCAS/Region 2	no bid	no offer	no bid	10	no bid	no bid	n/a	n/a

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

<sup>2</sup>Average premium/discount to tariff, last auction. n/a = not available.

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

<sup>4</sup>UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

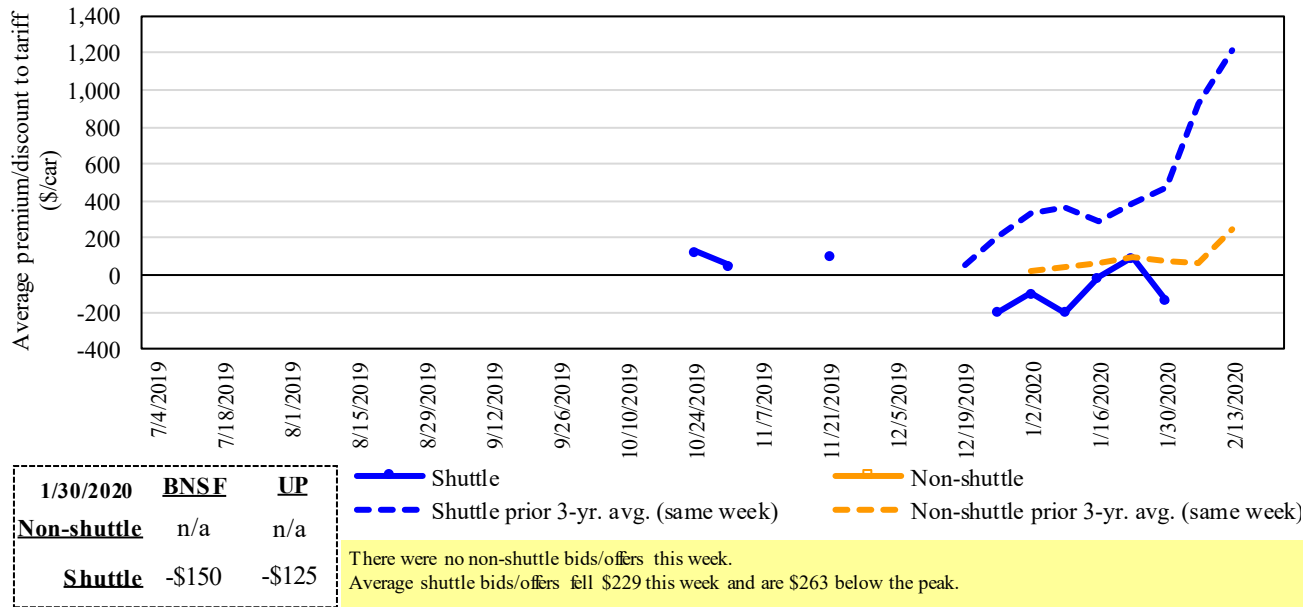
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

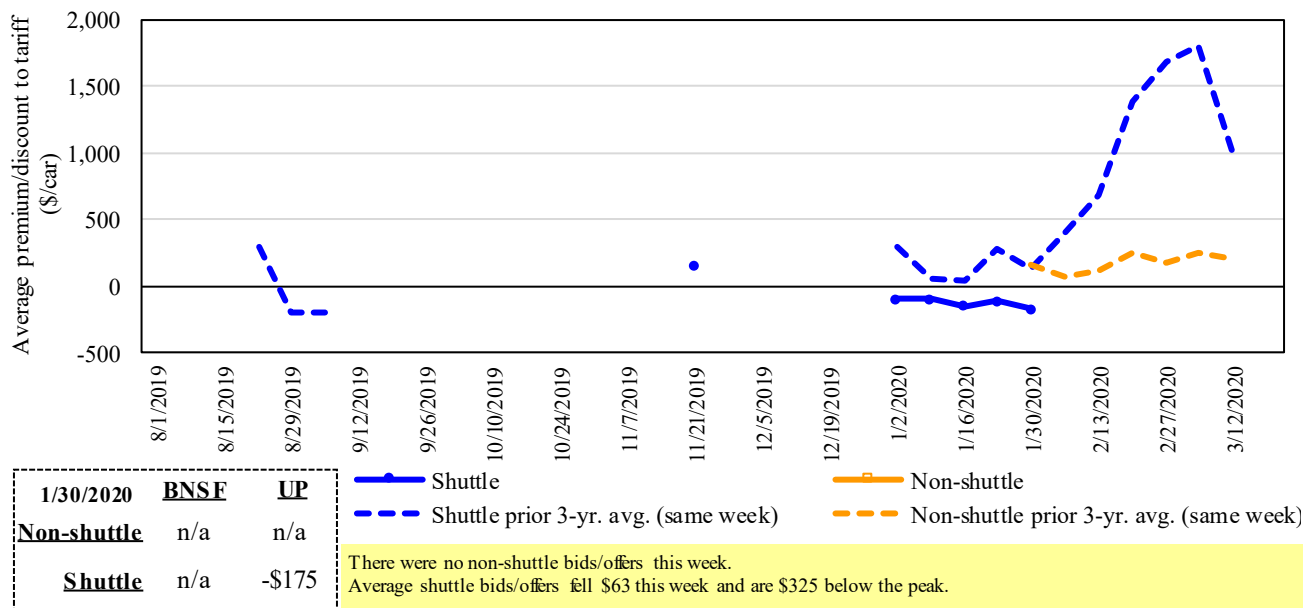
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

**Figure 4**  
**Bids/offers for railcars to be delivered in February 2020, secondary market**



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.  
Source: USDA, Agricultural Marketing Service.

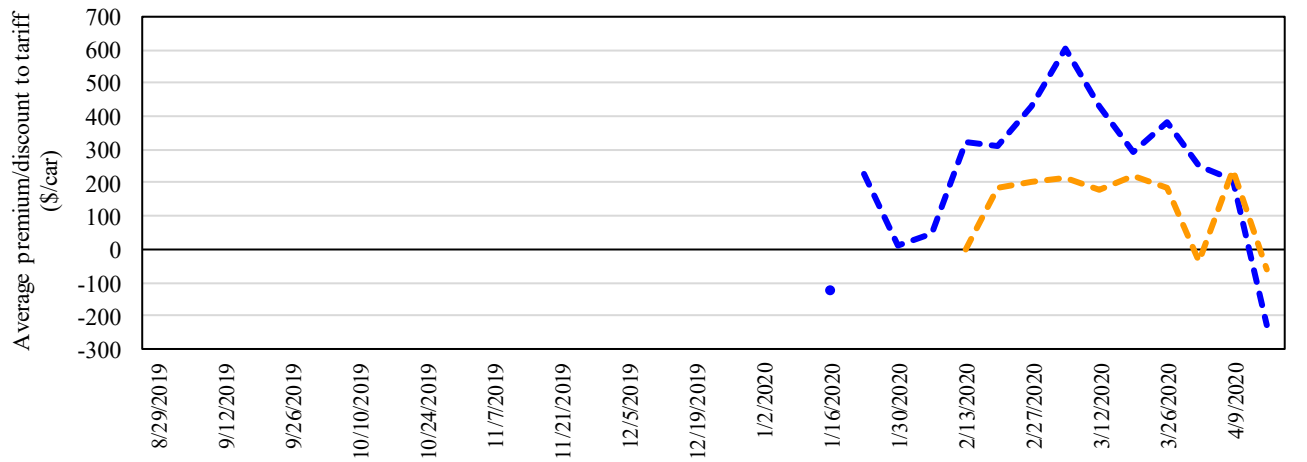
**Figure 5**  
**Bids/offers for railcars to be delivered in March 2020, secondary market**



Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.  
Source: USDA, Agricultural Marketing Service.

Figure 6

**Bids/offers for railcars to be delivered in April 2020, secondary market**



<b>1/30/2020</b>	<b>BNSF</b>	<b>UP</b>
<b>Non-shuttle</b>	n/a	n/a
<b>Shuttle</b>	n/a	n/a

—●— Shuttle  
- - - Shuttle prior 3-yr. avg. (same week)  
—□— Non-shuttle  
- - - Non-shuttle prior 3-yr. avg. (same week)

There were no non-shuttle bids/offers this week.  
 There were no shuttle bids/offers this week.

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad. Source: USDA, Agricultural Marketing Service.

Table 6

**Weekly secondary railcar market (\$/car)<sup>1</sup>**

For the week ending:		Delivery period					
		Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20
<b>Non-shuttle</b>	<b>BNSF-GF</b>	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	n/a	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	n/a	n/a	n/a	n/a	n/a	n/a
<b>Shuttle</b>	<b>BNSF-GF</b>	(150)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(242)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	(578)	n/a	n/a	n/a	n/a	n/a
	<b>UP-Pool</b>	(125)	(175)	n/a	n/a	n/a	n/a
	Change from last week	n/a	(62)	n/a	n/a	n/a	n/a
	Change from same week 2019	(156)	(125)	n/a	n/a	n/a	n/a

<sup>1</sup> Average premium/discount to tariff, \$/car-last week.

Note: Bids listed are market indicators only and are not guaranteed prices. n/a = not available; GF = guaranteed freight; Pool = guaranteed pool;

BNSF = BNSF Railway; UP = Union Pacific Railroad.

Data from James B. Joiner Co., Tradewest Brokerage Co.

Source: USDA, Agricultural Marketing Service.

The **tariff rail rate** is the base price of freight rail service. Together with **fuel surcharges** and any **auction and secondary rail** values, the tariff rail rate constitutes 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. However, during times of high rail demand or short supply, high auction and secondary rail values can exceed the cost of the tariff rate plus fuel surcharge.

Table 7

**Tariff rail rates for unit and shuttle train shipments<sup>1</sup>**

February 2020	Origin region <sup>3</sup>	Destination region <sup>3</sup>	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y <sup>4</sup>
					metric ton	bushel <sup>2</sup>	
<b>Unit train</b>							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$101	\$40.56	\$1.10	0
	Grand Forks, ND	Duluth-Superior, MN	\$4,333	\$0	\$43.03	\$1.17	2
	Wichita, KS	Los Angeles, CA	\$7,240	\$0	\$71.90	\$1.96	1
	Wichita, KS	New Orleans, LA	\$4,525	\$178	\$46.70	\$1.27	-1
	Sioux Falls, SD	Galveston-Houston, TX	\$6,976	\$0	\$69.28	\$1.89	1
	Northwest KS	Galveston-Houston, TX	\$4,801	\$195	\$49.61	\$1.35	0
	Amarillo, TX	Los Angeles, CA	\$5,121	\$271	\$53.55	\$1.46	0
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$201	\$40.73	\$1.03	-3
	Toledo, OH	Raleigh, NC	\$6,816	\$0	\$67.69	\$1.72	4
	Des Moines, IA	Davenport, IA	\$2,415	\$43	\$24.41	\$0.62	7
	Indianapolis, IN	Atlanta, GA	\$5,818	\$0	\$57.78	\$1.47	3
	Indianapolis, IN	Knoxville, TN	\$4,874	\$0	\$48.40	\$1.23	4
	Des Moines, IA	Little Rock, AR	\$3,800	\$125	\$38.98	\$0.99	-2
	Des Moines, IA	Los Angeles, CA	\$5,680	\$365	\$60.03	\$1.52	-1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$194	\$37.98	\$1.03	-12
	Toledo, OH	Huntsville, AL	\$5,630	\$0	\$55.91	\$1.52	3
	Indianapolis, IN	Raleigh, NC	\$6,932	\$0	\$68.84	\$1.87	3
	Indianapolis, IN	Huntsville, AL	\$5,107	\$0	\$50.71	\$1.38	3
Champaign-Urbana, IL	New Orleans, LA	\$4,645	\$201	\$48.13	\$1.31	-2	
<b>Shuttle train</b>							
Wheat	Great Falls, MT	Portland, OR	\$4,143	\$0	\$41.14	\$1.12	2
	Wichita, KS	Galveston-Houston, TX	\$4,361	\$0	\$43.31	\$1.18	2
	Chicago, IL	Albany, NY	\$7,074	\$0	\$70.25	\$1.91	20
	Grand Forks, ND	Portland, OR	\$5,801	\$0	\$57.61	\$1.57	1
	Grand Forks, ND	Galveston-Houston, TX	\$6,121	\$0	\$60.78	\$1.65	1
	Northwest KS	Portland, OR	\$6,012	\$320	\$62.88	\$1.71	1
Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31	0
	Sioux Falls, SD	Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
	Champaign-Urbana, IL	New Orleans, LA	\$3,820	\$201	\$39.93	\$1.01	0
	Lincoln, NE	Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
	Des Moines, IA	Amarillo, TX	\$4,220	\$157	\$43.47	\$1.10	4
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
	Council Bluffs, IA	Stockton, CA	\$5,000	\$0	\$49.65	\$1.26	0
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,850	\$0	\$58.09	\$1.58	2
	Minneapolis, MN	Portland, OR	\$5,900	\$0	\$58.59	\$1.59	2
	Fargo, ND	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	2
	Council Bluffs, IA	New Orleans, LA	\$4,875	\$232	\$50.71	\$1.38	2
	Toledo, OH	Huntsville, AL	\$4,805	\$0	\$47.72	\$1.30	4
Grand Island, NE	Portland, OR	\$5,860	\$327	\$61.44	\$1.67	2	

<sup>1</sup>A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of

75-120 cars that meet railroad efficiency requirements.

<sup>2</sup>Approximate load per car = 111 short tons (100.7 metric tons): corn 56 pounds per bushel (lbs/bu), wheat and soybeans 60 lbs/bu.

<sup>3</sup>Regional economic areas are defined by the Bureau of Economic Analysis (BEA).

<sup>4</sup>Percentage change year over year (Y/Y) calculated using tariff rate plus fuel surcharge.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.



Table 8

**Tariff rail rates for U.S. bulk grain shipments to Mexico**

Commodity	Date: February 2020		Tariff rate/car <sup>1</sup>	Fuel	Tariff plus surcharge per:		Percent change <sup>4</sup>
	Origin state	Destination region		surcharge per car <sup>2</sup>	metric ton <sup>3</sup>	bushel <sup>3</sup>	
Wheat	MT	Chihuahua, CI	\$7,509	\$0	\$76.72	\$2.09	3
	OK	Cuautitlan, EM	\$6,775	\$139	\$70.65	\$1.92	0
	KS	Guadalajara, JA	\$7,534	\$633	\$83.44	\$2.27	5
	TX	Salinas Victoria, NL	\$4,329	\$84	\$45.09	\$1.23	0
Corn	IA	Guadalajara, JA	\$8,902	\$542	\$96.49	\$2.45	6
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	3
	NE	Queretaro, QA	\$8,278	\$284	\$87.49	\$2.22	1
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlalnepantla, EM	\$7,643	\$277	\$80.92	\$2.05	1
	SD	Torreón, CU	\$7,690	\$0	\$78.57	\$1.99	3
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$506	\$92.49	\$2.51	5
	NE	Guadalajara, JA	\$9,172	\$529	\$99.11	\$2.69	5
	IA	El Castillo, JA	\$9,490	\$0	\$96.97	\$2.64	4
	KS	Torreón, CU	\$7,964	\$366	\$85.10	\$2.31	4
Sorghum	NE	Celaya, GJ	\$7,772	\$479	\$84.31	\$2.14	5
	KS	Queretaro, QA	\$8,108	\$174	\$84.62	\$2.15	1
	NE	Salinas Victoria, NL	\$6,713	\$140	\$70.01	\$1.78	1
	NE	Torreón, CU	\$7,157	\$339	\$76.59	\$1.94	4

<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.

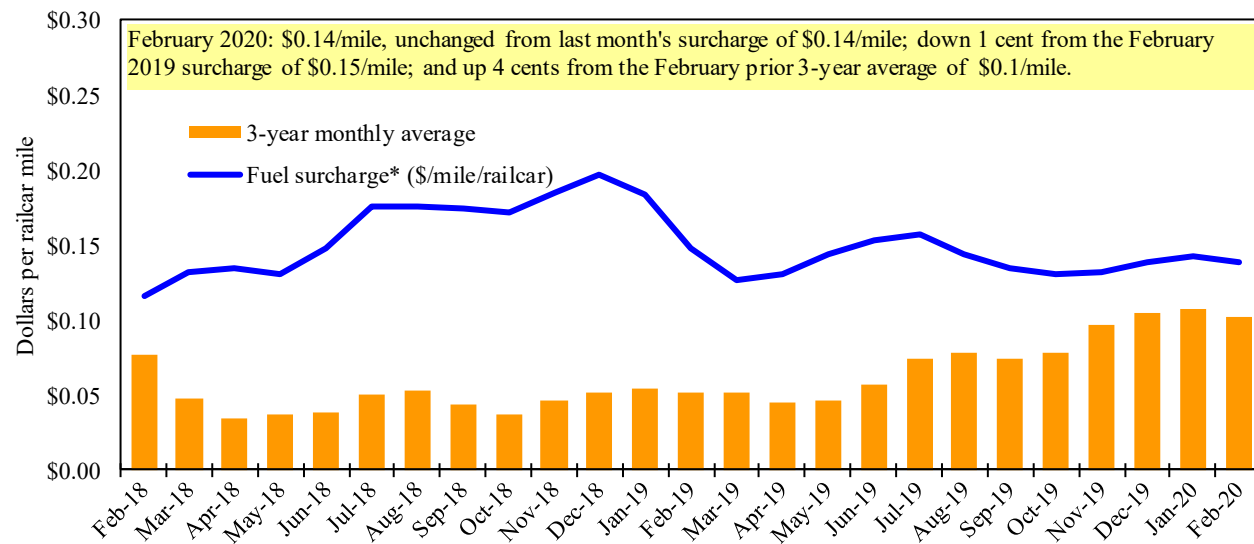
<sup>2</sup>Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

<sup>4</sup>Percentage change calculated using tariff rate plus fuel surcharge; Y/Y = year over year.

Sources: BNSF Railway, Union Pacific Railroad, Kansas City Southern.

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.

\* Beginning January 2009, the Canadian Pacific fuel surcharge is computed by a monthly average of the bi-weekly fuel surcharge.

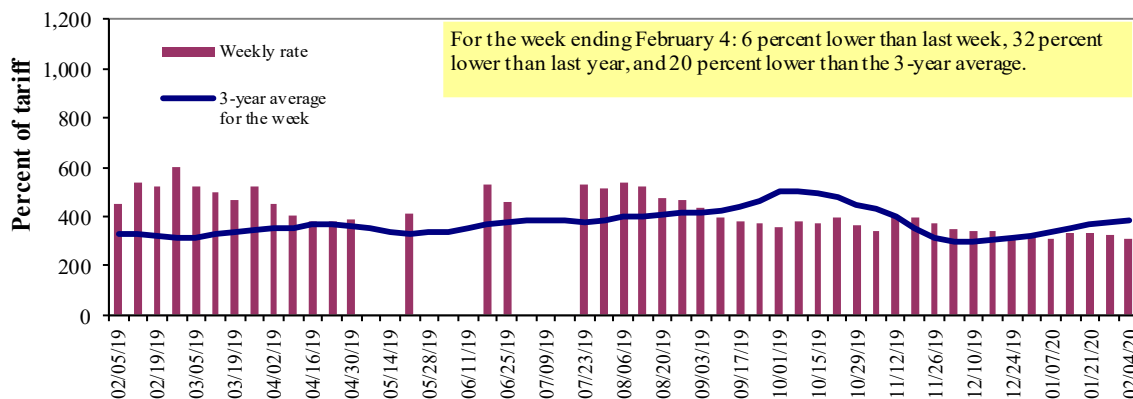
\*\* CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

Sources: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

# 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: USDA, Agricultural Marketing Service.

Table 9

### Weekly barge freight rates: Southbound only

		Twin Cities	Mid-Mississippi	Lower Illinois River	St. Louis	Cincinnati	Lower Ohio	Cairo-Memphis
Rate <sup>1</sup>	2/4/2020	-	-	307	204	230	230	199
	1/28/2020	-	-	326	218	245	245	209
\$/ton	2/4/2020	-	-	14.24	8.14	10.79	9.29	6.25
	1/28/2020	-	-	15.13	8.70	11.49	9.90	6.56
<b>Current week % change from the same week:</b>								
	Last year	-	-	-32	-40	-40	-40	-43
	3-year avg. <sup>2</sup>	-	-	-20	-30	-29	-29	-22
Rate <sup>1</sup>	February	-	-	315	218	234	234	204
	April	384	353	323	225	241	241	204

<sup>1</sup>Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); <sup>2</sup>4-week moving average; ton = 2,000 pounds; "-" not available due to closure.

Source: USDA, Agricultural Marketing Service.

### Figure 9 Benchmark tariff rates

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

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

Map Credit: USDA, Agricultural Marketing Service

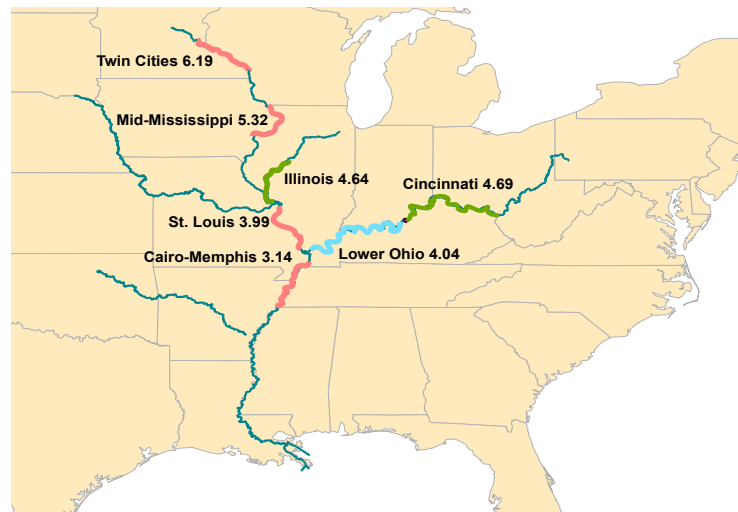
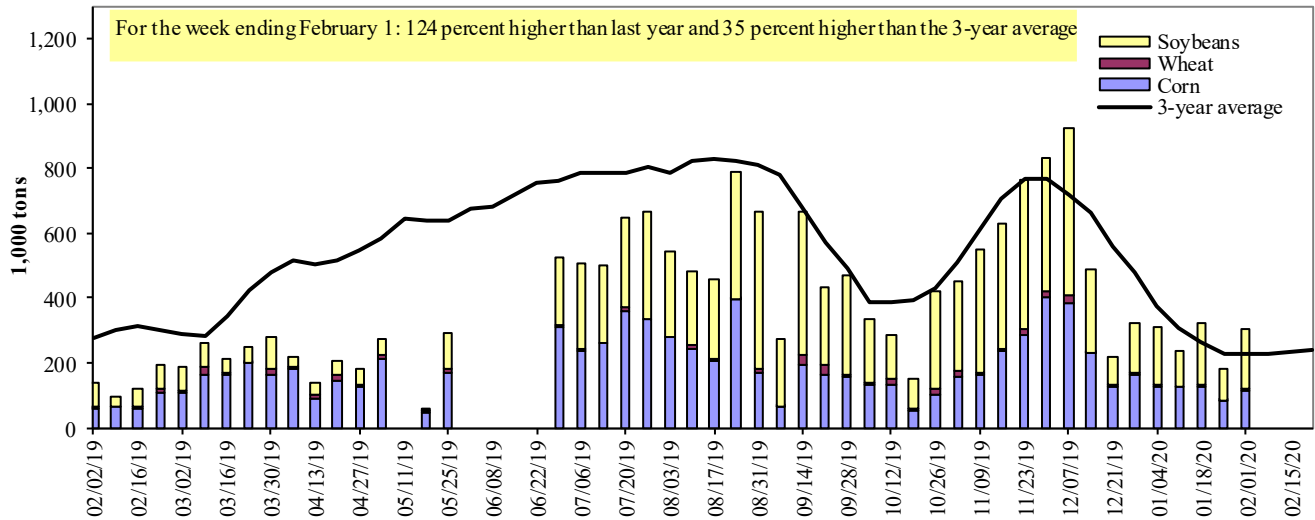


Figure 10

**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.

Table 10

**Barge grain movements (1,000 tons)**

For the week ending 02/01/2020	Corn	Wheat	Soybeans	Other	Total
<b>Mississippi River</b>					
Rock Island, IL (L15)	0	0	0	0	0
Winfield, MO (L25)	0	0	0	0	0
Alton, IL (L26)	106	8	166	0	279
Granite City, IL (L27)	114	8	183	0	305
<b>Illinois River (La Grange)</b>					
	88	8	125	0	221
<b>Ohio River (Olmsted)</b>					
	91	5	112	0	208
<b>Arkansas River (L1)</b>					
	0	17	17	0	34
Weekly total - 2020	205	30	312	0	547
Weekly total - 2019	97	40	219	0	355
2020 YTD <sup>1</sup>	1,046	111	1,479	6	2,641
2019 YTD <sup>1</sup>	1,047	188	1,085	7	2,327
2020 as % of 2019 YTD	100	59	136	NA	113
Last 4 weeks as % of 2019 <sup>2</sup>	104	52	120	79	108
Total 2019	12,780	1,631	14,683	154	29,247

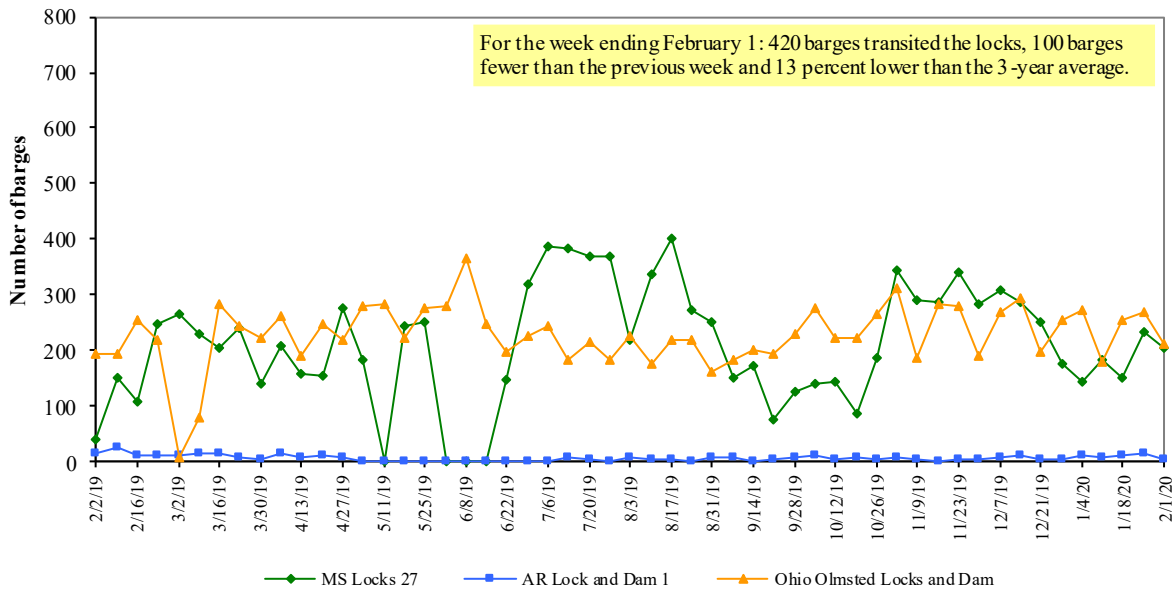
<sup>1</sup> Weekly total, YTD (year-to-date), and calendar year total include MS/27, OH/Olmsted, and AR/1; Other refers to oats, barley, sorghum, and rye. L (as in "L15") refers to a lock or lock and dam facility. Olmsted = Olmsted Locks and Dam. La Grange = La Grange Lock and Dam.

<sup>2</sup> As a percent of same period in 2019.

Note: Total may not add exactly because of rounding. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by C  
Source: U.S. Army Corps of Engineers.

Figure 11

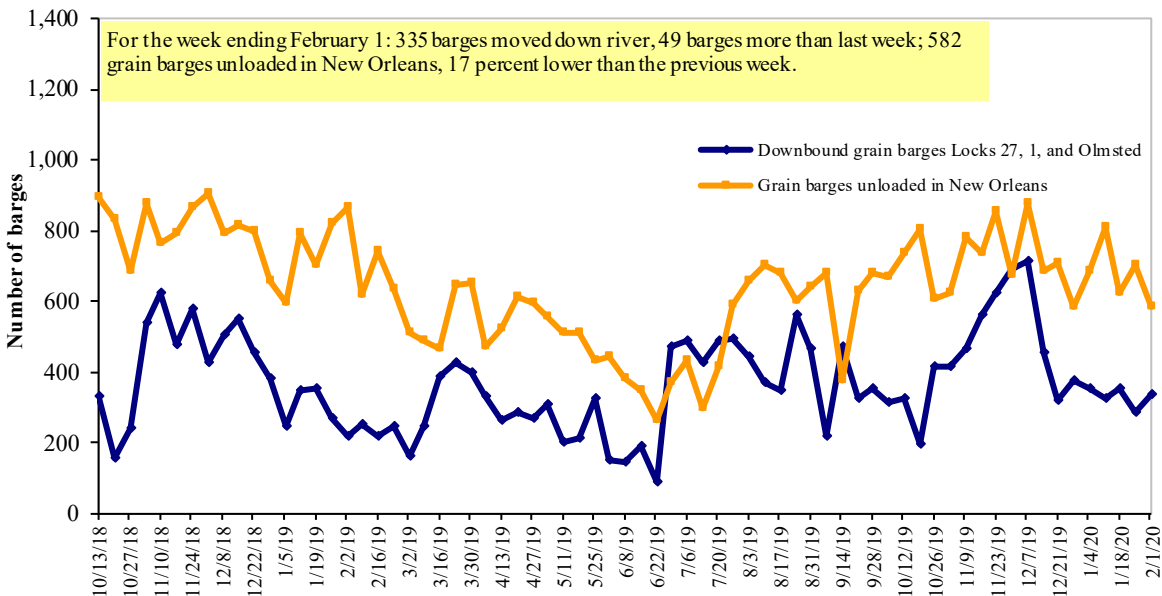
**Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**



Source: U.S. Army Corps of Engineers.

Figure 12

**Grain barges for export in New Orleans region**



Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

# 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, week ending 2/3/2020 (U.S. \$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.003	-0.044	-0.035
	New England	3.105	-0.014	-0.071
	Central Atlantic	3.180	-0.044	-0.047
	Lower Atlantic	2.863	-0.051	-0.016
II	Midwest	2.839	-0.062	0.000
III	Gulf Coast	2.710	-0.063	-0.069
IV	Rocky Mountain	2.944	-0.040	0.061
	West Coast	3.517	-0.048	0.082
V	West Coast less California	3.146	-0.052	0.059
	California	3.812	-0.045	0.101
Total	United States	2.956	-0.054	-0.010

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

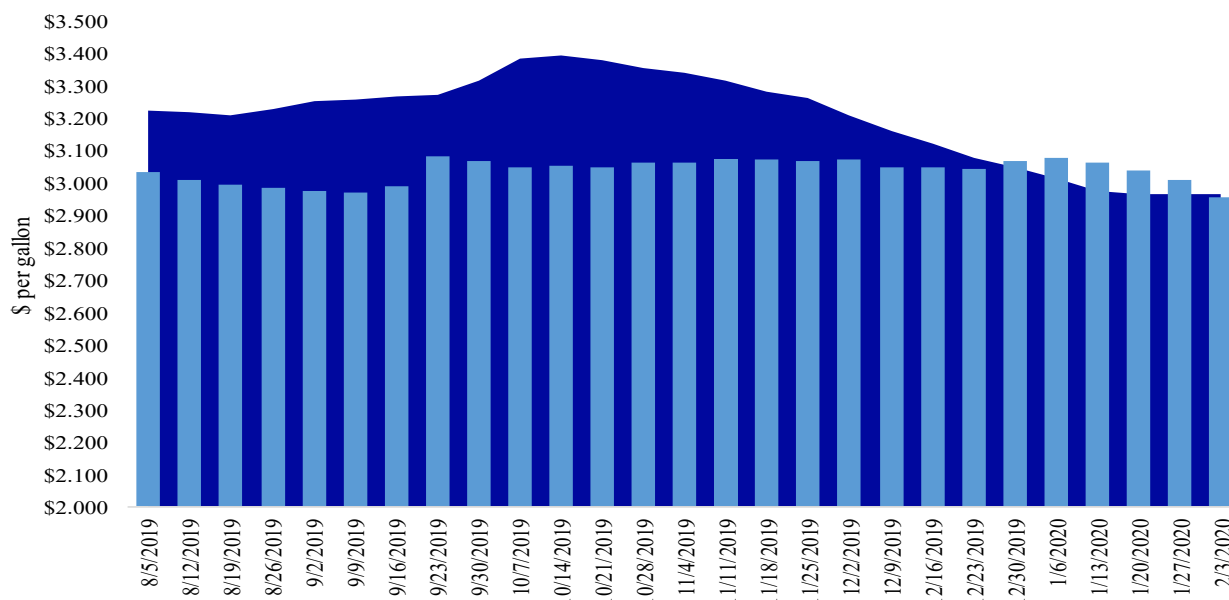
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

**Weekly diesel fuel prices, U.S. average**

For the week ending February 3, the U.S. average diesel fuel price decreased 5.4 cents from the previous week to \$2.956 per gallon, 1.0 cent below the same week last year.

■ Last year    ■ Current year  
\$2.966        \$2.956



Source: U.S. Department of Energy, Energy Information Administration, Retail On-Highway Diesel Prices.

# Grain Exports

Table 12

## U.S. export balances and cumulative exports (1,000 metric tons)

For the week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
<b>Export balances<sup>1</sup></b>									
1/23/2020	1,825	409	1,590	1,210	190	5,224	11,035	6,216	22,474
This week year ago	1,808	886	1,511	1,167	90	5,463	13,021	12,517	31,001
<b>Cumulative exports-marketing year<sup>2</sup></b>									
2019/20 YTD	5,902	1,735	4,428	3,016	624	15,704	10,508	25,457	51,669
2018/19 YTD	3,771	1,391	3,993	2,962	330	12,446	19,267	17,852	49,565
YTD 2019/20 as % of 2018/19	157	125	111	102	189	126	55	143	104
Last 4 wks. as % of same period 2018/19*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327
Total 2017/18	9,150	2,343	5,689	4,854	384	22,419	57,209	56,214	135,842

<sup>1</sup> Current unshipped (outstanding) export sales to date.

<sup>2</sup> Shipped export sales to date; new marketing year now in effect for wheat, corn, and soybeans.

\*n/a = not available because of a partial government shutdown in January 2019.

Note: marketing year: wheat = 6/01-5/31, corn and soybeans = 9/01-8/31. YTD = year-to-date; wks. = weeks; HRW= hard red winter; SRW= soft red winter;

HRS= hard red spring; SWW= soft white wheat; DUR= durum.

Source: USDA, Foreign Agricultural Service.

Table 13

## Top 5 importers<sup>1</sup> of U.S. corn

For the week ending 1/23/2020	Total commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr. avg. 2016-18
	2019/20 current MY	2018/19 last MY*		
	- 1,000 mt -			
Mexico	9,521	11,150	(15)	14,659
Japan	3,689	6,366	(42)	11,955
Korea	0	2,300	(100)	4,977
Colombia	2,041	2,151	(5)	4,692
Peru	65	1,469	(96)	2,808
<b>Top 5 importers</b>	<b>15,315</b>	<b>23,436</b>	<b>(35)</b>	<b>39,091</b>
<b>Total U.S. corn export sales</b>	<b>21,543</b>	<b>32,287</b>	<b>(33)</b>	<b>54,024</b>
% of projected exports	48%	61%		
Change from prior week <sup>2</sup>	1,235	n/a		
<b>Top 5 importers' share of U.S. corn export sales</b>	71%	73%		72%
<b>USDA forecast January 2020</b>	<b>45,165</b>	<b>52,545</b>	<b>(14)</b>	
<b>Corn use for ethanol USDA forecast, January 2020</b>	<b>136,525</b>	<b>136,551</b>	<b>(0)</b>	

<sup>1</sup> Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup> Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales.

<sup>3</sup> FAS marketing year ranking reports (carryover plus accumulated export); yr. = year; avg. = average.

\*n/a = not available because of a partial government shutdown in January 2019.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 14

**Top 5 importers<sup>1</sup> of U.S. soybeans**

For the week ending 1/23/2020	Total commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr. avg. 2016-18
	2019/20 current MY	2018/19 last MY*		
	- 1,000 mt -			- 1,000 mt -
China	11,975	3,484	244	25,733
Mexico	3,182	4,100	(22)	4,271
Indonesia	1,031	1,163	(11)	2,386
Japan	1,447	1,377	5	2,243
Egypt	1,575	1,227	28	1,983
<b>Top 5 importers</b>	<b>19,210</b>	<b>11,350</b>	<b>69</b>	<b>36,616</b>
<b>Total U.S. soybean export sales</b>	<b>31,673</b>	<b>30,369</b>	<b>4</b>	<b>53,746</b>
% of projected exports	65%	64%		
change from prior week <sup>2</sup>	470	n/a		
<b>Top 5 importers' share of U.S. soybean export sales</b>	61%	37%		<b>68%</b>
<b>USDA forecast, January 2020</b>	<b>48,365</b>	<b>47,629</b>	<b>102</b>	

<sup>1</sup>Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; marketing year (MY) = Sep 1 - Aug 31.

<sup>2</sup>Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales and/or accumulated sales.

<sup>3</sup>FAS marketing year ranking reports (carry over plus accumulated export); yr. = year; avg. = average.

\*n/a = not available because of a partial government shutdown in January 2019.

Note: A red number in parentheses indicates a negative number; mt = metric ton.

Source: USDA, Foreign Agricultural Service.

Table 15

**Top 10 importers<sup>1</sup> of all U.S. wheat**

For the week ending 1/23/2020	Total commitments <sup>2</sup>		% change current MY from last MY	Exports <sup>3</sup> 3-yr. avg. 2016-18
	2019/20 current MY	2018/19 last MY*		
	- 1,000 mt -			- 1,000 mt -
Philippines	2,603	2,415	8	3,047
Mexico	2,957	2,213	34	3,034
Japan	2,140	2,166	(1)	2,695
Nigeria	1,130	862	31	1,564
Indonesia	746	692	8	1,381
Korea	1,124	1,134	(1)	1,355
Taiwan	1,056	812	30	1,164
Egypt	101	391	(74)	821
Thailand	757	790	(4)	747
Iraq	262	414	(37)	574
<b>Top 10 importers</b>	<b>12,876</b>	<b>11,888</b>	<b>8</b>	<b>16,382</b>
<b>Total U.S. wheat export sales</b>	<b>20,927</b>	<b>17,909</b>	<b>17</b>	<b>24,388</b>
% of projected exports	79%	70%		
change from prior week <sup>2</sup>	646	n/a		
<b>Top 10 importers' share of U.S. wheat export sales</b>	62%	66%		<b>67%</b>
<b>USDA forecast, January 2020</b>	<b>26,567</b>	<b>25,504</b>	<b>4</b>	

<sup>1</sup>Based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for 2018/19; Marketing year (MY) = Jun 1 - May 31.

<sup>2</sup>Cumulative exports (shipped) + outstanding sales (unshipped), FAS weekly export sales report, or export sales query. The total commitments change (net sales) from prior week could include revisions from the previous week's outstanding and/or accumulated sales.

<sup>3</sup>FAS marketing year final reports (carry over plus accumulated export); yr. = year; avg. = average.

\*n/a = not available because of a partial government shutdown in January 2019.

Note: A red number in parentheses indicates a negative number.

Source: USDA, Foreign Agricultural Service.

Table 16

## Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	For the week ending 01/30/20	Previous week*	Current week as % of previous	2020 YTD*	2019 YTD*	2020 YTD as % of 2019 YTD	Last 4-weeks as % of:		2019 total*
							Last year	Prior 3-yr. avg.	
<b>Pacific Northwest</b>									
Wheat	359	160	224	1,344	951	141	128	123	13,961
Corn	1	15	3	66	1,139	6	6	7	7,047
Soybeans	362	227	159	1,221	1,014	120	115	79	11,969
<b>Total</b>	<b>722</b>	<b>402</b>	<b>179</b>	<b>2,631</b>	<b>3,104</b>	<b>85</b>	<b>77</b>	<b>70</b>	<b>32,977</b>
<b>Mississippi Gulf</b>									
Wheat	0	42	0	286	544	53	41	59	4,448
Corn	402	536	75	1,904	2,346	81	68	69	20,763
Soybeans	863	734	118	4,059	2,976	136	115	100	31,398
<b>Total</b>	<b>1,265</b>	<b>1,312</b>	<b>96</b>	<b>6,250</b>	<b>5,866</b>	<b>107</b>	<b>89</b>	<b>86</b>	<b>56,609</b>
<b>Texas Gulf</b>									
Wheat	45	11	397	387	331	117	77	65	6,009
Corn	42	10	408	74	33	223	158	86	640
Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	2
<b>Total</b>	<b>87</b>	<b>22</b>	<b>402</b>	<b>461</b>	<b>364</b>	<b>127</b>	<b>84</b>	<b>68</b>	<b>6,650</b>
<b>Interior</b>									
Wheat	32	24	133	172	171	101	91	98	1,987
Corn	108	108	101	583	590	99	83	83	7,857
Soybeans	172	129	133	705	544	130	119	127	7,043
<b>Total</b>	<b>312</b>	<b>261</b>	<b>119</b>	<b>1,460</b>	<b>1,305</b>	<b>112</b>	<b>99</b>	<b>103</b>	<b>16,887</b>
<b>Great Lakes</b>									
Wheat	0	0	n/a	1	21	4	4	6	1,339
Corn	0	0	n/a	0	0	n/a	n/a	n/a	11
Soybeans	0	0	n/a	0	16	0	0	0	493
<b>Total</b>	<b>0</b>	<b>0</b>	<b>n/a</b>	<b>1</b>	<b>38</b>	<b>2</b>	<b>2</b>	<b>4</b>	<b>1,844</b>
<b>Atlantic</b>									
Wheat	0	0	n/a	0	0	n/a	n/a	0	37
Corn	0	0	n/a	0	21	0	0	0	99
Soybeans	29	23	127	132	190	69	45	35	1,353
<b>Total</b>	<b>29</b>	<b>23</b>	<b>127</b>	<b>132</b>	<b>211</b>	<b>63</b>	<b>42</b>	<b>33</b>	<b>1,489</b>
<b>U.S. total from ports*</b>									
Wheat	436	238	183	2,191	2,018	109	91	95	27,781
Corn	552	668	83	2,627	4,129	64	53	55	36,417
Soybeans	1,427	1,114	128	6,117	4,741	129	112	94	52,258
<b>Total</b>	<b>2,415</b>	<b>2,020</b>	<b>120</b>	<b>10,935</b>	<b>10,888</b>	<b>100</b>	<b>86</b>	<b>81</b>	<b>116,457</b>

\*Data include revisions from prior weeks; some regional totals may not add exactly because of rounding.

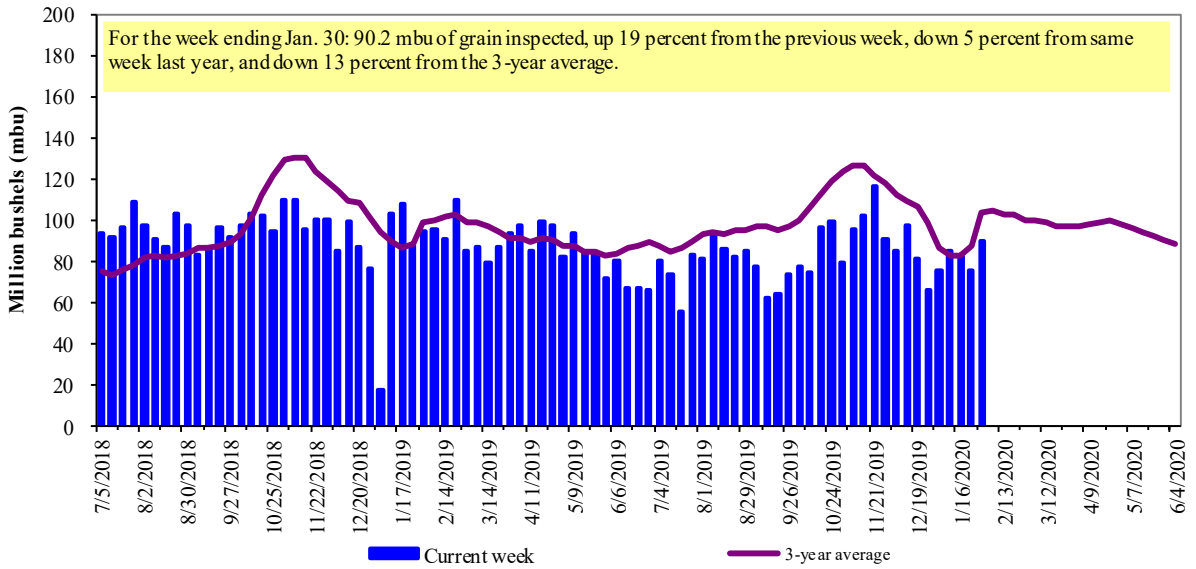
Source: USDA, Federal Grain Inspection Service; YTD= year-to-date; n/a = not applicable or no change.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 45 percent of U.S.-grown wheat, 50 percent of U.S.-grown soybeans, and 20 percent of the U.S.-grown corn. Approximately 53 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2018.



Figure 14

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

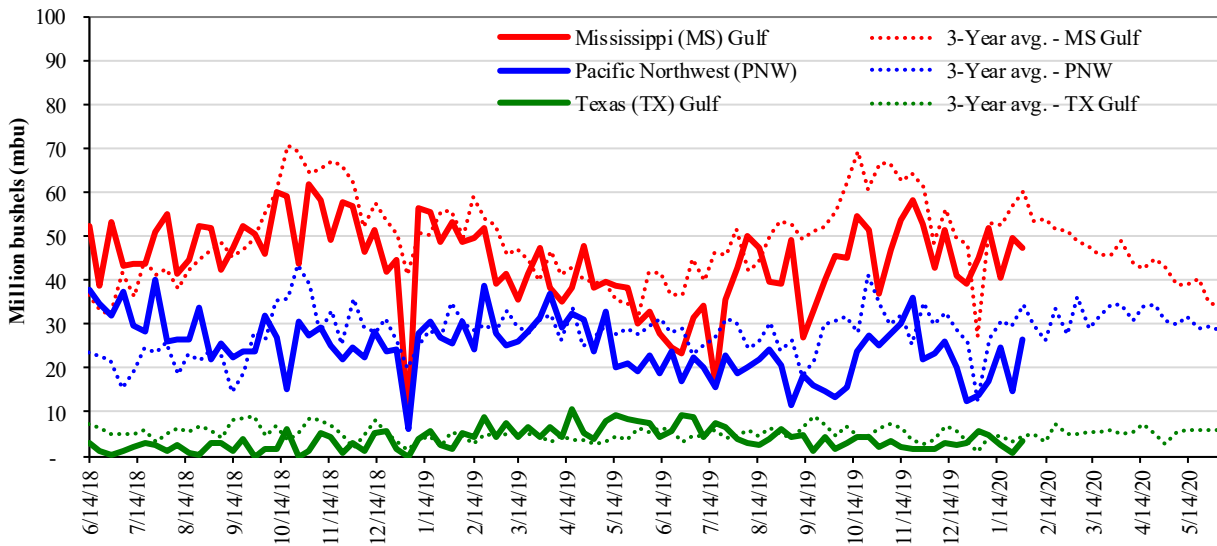


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

**U.S. grain inspections: U.S. Gulf and PNW<sup>1</sup> (wheat, corn, and soybeans)**



Week ending 01/30/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 47.5	Last wk.:	down 4	up 302	unchanged	up 79
PNW: 26.5	Last year (same wk.):	down 11	up 131	down 7	up 3
TX Gulf: 3.3	3-year avg. (4-wk mov. avg.):	down 14	down 21	down 15	down 12

Note: avg. = average; wk. = week; mov. = moving.

Source: USDA, Federal Grain Inspection Service.

# Ocean Transportation

Table 17

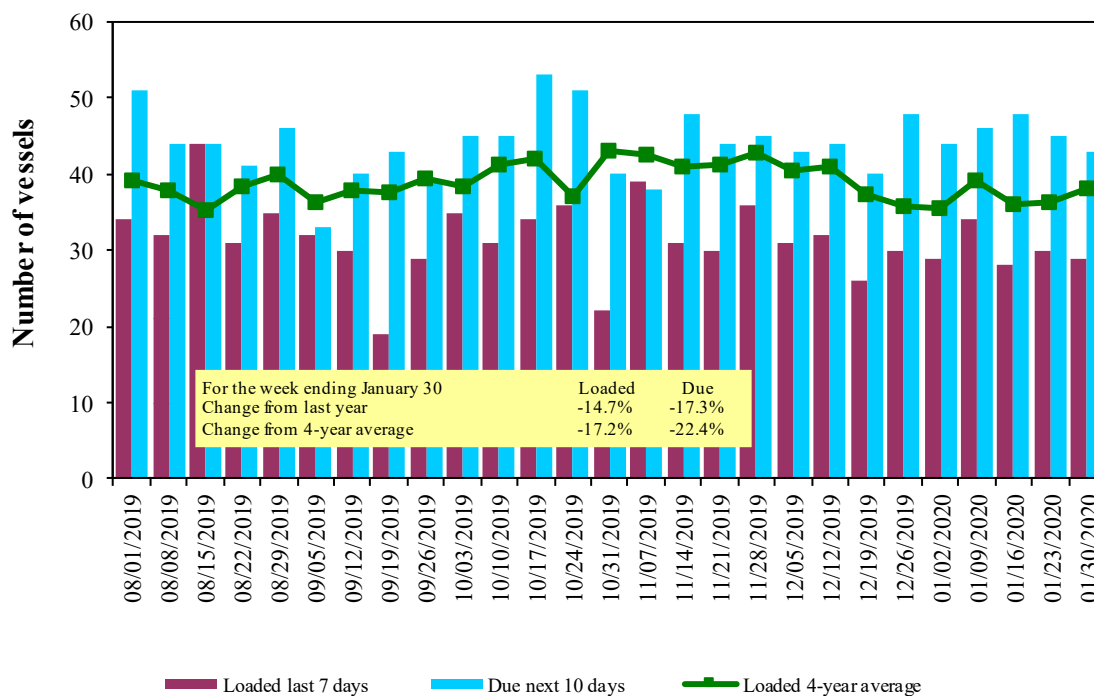
**Weekly port region grain ocean vessel activity (number of vessels)**

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
1/30/2020	44	29	43	10
1/23/2020	37	30	45	12
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

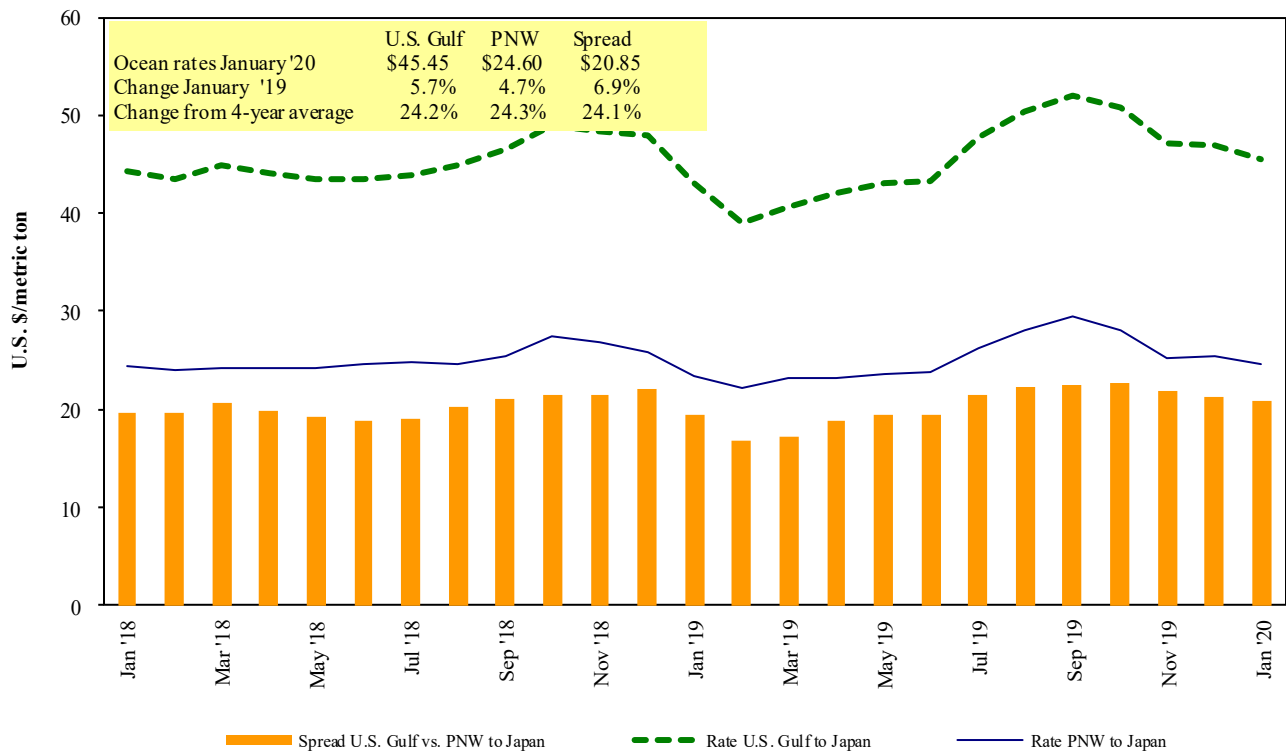
**U.S. Gulf<sup>1</sup> vessel loading activity**



<sup>1</sup>U.S. Gulf includes Mississippi, Texas, and East Gulf.  
 Source: USDA, Agricultural Marketing Service.

Figure 17

**Grain vessel rates, U.S. to Japan**



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting.

Table 18

**Ocean freight rates for selected shipments, week ending 02/01/2020**

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Bangladesh	Wheat	Dec 10/20	48,990	79.92*
U.S. Gulf	China	Heavy grain	Jan 25/30	65,000	46.50
U.S. Gulf	China	Heavy grain	Dec 15/20	65,000	49.75
U.S. Gulf	China	Heavy grain	Nov 15/18	66,000	49.00
U.S. Gulf	Rotterdam	Heavy grain	Feb 5/11	55,000	19.50
PNW	China	Heavy grain	Jan 22/26	63,000	23.00
PNW	Bangladesh	Wheat	Dec 10/20	23,080	74.44*
Brazil	China	Heavy grain	Feb 12/21	65,000	34.50
Brazil	China	Heavy grain	Feb 18/27	60,000	34.00
Brazil	Japan	Corn	Dec 22/31	49,000	37.25 op 37.15

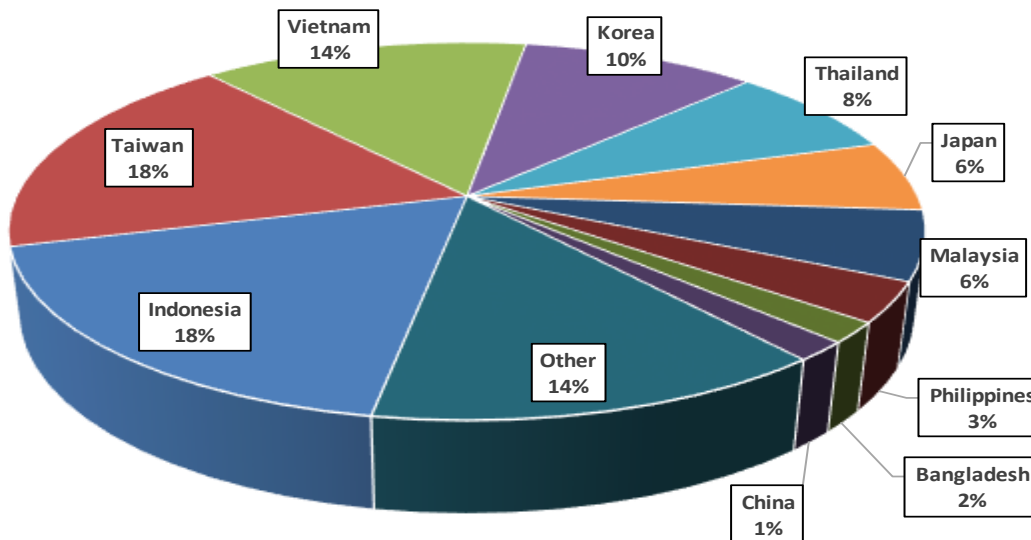
\*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated; op = option.

Source: Maritime Research, Inc.

In 2018, containers were used to transport 8 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2018 went to Asia, of which 13 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

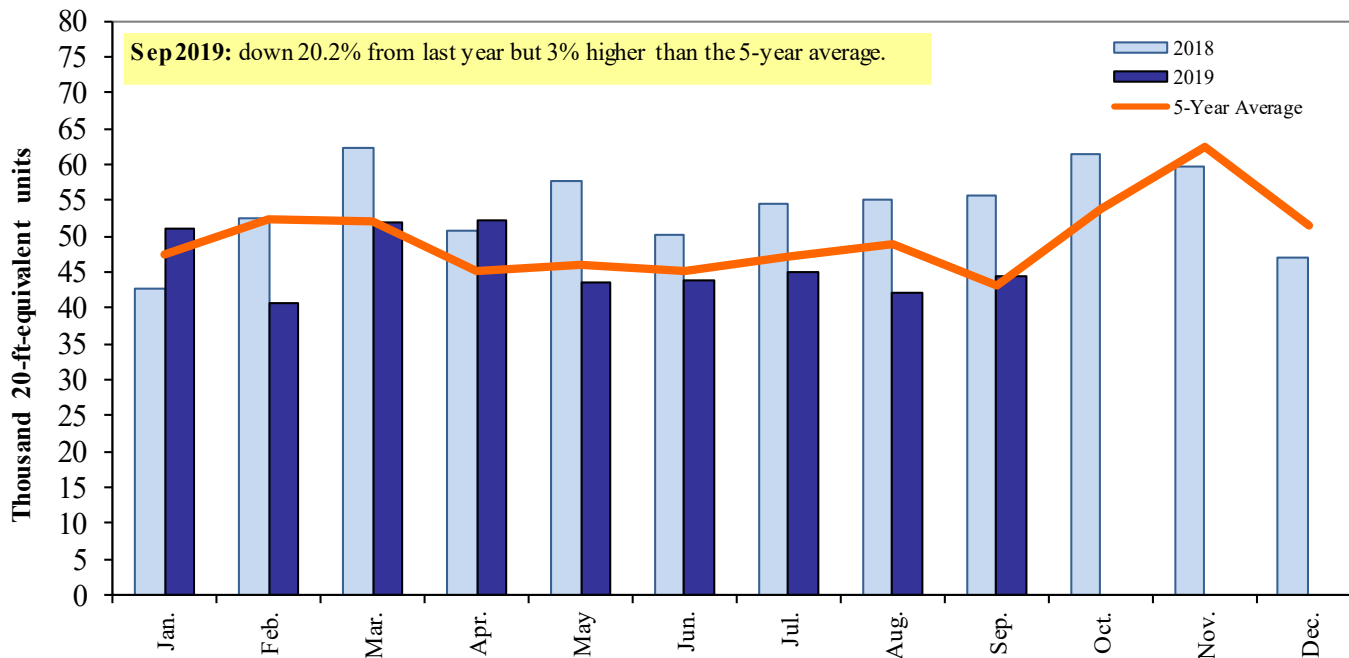
**Figure 18**  
**Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2019**



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 1001, 100190, 1002, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 1102, 110100, 230310, 110220, 110290, 1201, 120100, 230210, 230990, 230330, and 120810.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

**Figure 19**  
**Monthly shipments of containerized grain to Asia**



Note: The following Harmonized Tariff Codes are used to calculate containerized grains movements: 100190, 100200, 100300, 100400, 100590, 100700, 110100, 110220, 110290, 120100, 120810, 230210, 230310, 230330, and 230990.

Source: USDA, Agricultural Marketing Service, Transportation Services Division analysis of PIERS data.

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