



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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June 18, 2020

WEEKLY HIGHLIGHTS

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ATRI Requests Motor Carrier Participation in Annual Operational Costs of Trucking Report

To complete its 2020 [Operational Costs of Trucking](#) report, the American Trucking Research Institute (ATRI) has asked for-hire motor carriers to provide operational costs data by Friday, August 21, 2020. The for-hire metrics requested by ATRI include driver pay, fuel costs (all 2019 cost-per-mile and/or cost-per-hour data using ATRI's online data entry form), insurance premiums, and lease or purchase payments. ATRI collects this information directly from trucking fleets and owner-operators. Motor carriers and public-sector agencies widely use ATRI's analysis as a benchmarking tool to inform their decisions in transportation planning and infrastructure investment.

FMCSA Extends HOS Exemption to July 14

The Federal Motor Carrier Safety Administration (FMCSA) has extended its national emergency exemption for hours of service (HOS) to July 14. (For coverage of the initial exemption and its terms, see May 28 [Grain Transportation Report Highlight "FMCSA Issues Final Rule on Changes to HOS Regulations."](#)) Effective June 15, [the extension](#) is limited to three categories of freight to support emergency response related to Covid-19—(1) Livestock and livestock feed; (2) Medical supplies and equipment related to the testing, diagnosis and treatment of COVID-19; and (3) Supplies and equipment necessary for community safety, sanitation, and prevention of community transmission of COVID-19, such as masks, gloves, hand sanitizer, soap, and disinfectants. The extension excludes grocery restocking, fuel and precursor raw materials, and other categories FMCSA deems non-emergency. The exemption does not apply to routine commercial deliveries, "including mixed loads with a nominal quantity of qualifying emergency relief" that have been added solely to get the benefits of the exemption.

Soybean Inspections Rebound, but Total Inspections Decline

For the week ending June 11, [total inspections of grain](#) (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 1.76 million metric tons (mmt). Total grain inspections were down 9 percent from the previous week, unchanged from last year, and down 23 percent from the 3-year average. Soybean inspections increased 37 percent from week to week as shipments through the Mississippi Gulf and the Interior rebounded. However, the increase in soybean inspections did not completely offset the decreases for corn (down 22 percent) and wheat (down 7 percent) in the total. Pacific Northwest (PNW) grain inspections increased 7 percent from the previous week, and Mississippi Gulf inspections decreased 16 percent from the same period. Outstanding export sales were also up from the previous week for soybeans, but down for wheat and corn.

Snapshots by Sector

Export Sales

For the week ending June 4, [unshipped balances](#) of wheat, corn, and soybeans totaled 24.0 million metric tons (mmt). This represented a 1-percent decrease in outstanding sales from the same time last year. Net [corn export sales](#) were 0.661 mmt, up 4 percent from the past week. Net [soybean export sales](#) were 1.004 mmt, up significantly from the previous week. Net weekly [wheat export sales](#) for the 2020/21 marketing year which began June 1 were 0.270 mmt,

Rail

U.S. Class I railroads originated 21,026 [grain carloads](#) during the week ending June 6. This was 1 percent less than the previous week, 1 percent less than last year, and 6 percent lower than the 3-year average.

Average June shuttle [secondary railcar](#) bids/offers (per car) were \$84 above tariff for the week ending June 11. This was \$116 more than last week and \$141 lower than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending June 13, [barge grain movements](#) totaled 943,290 tons. This was 19 percent more than the previous week and 186 percent more than the same period last year.

For the week ending June 13, 617 grain barges [moved down river](#)—100 more barges than the previous week. There were 514 grain barges [unloaded in New Orleans](#), 23 percent less than the previous week.

Ocean

For the week ending June 11, 27 [oceangoing grain vessels](#) were loaded in the U.S. Gulf—13 percent more than the same period last year. Within the next 10 days (starting June 12), 46 vessels were expected to be loaded—7 percent more than the same period last year.

As of June 11, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$35.50. This was 1 percent more than the previous week. The rate from PNW to Japan was \$18.75 per mt, 1 percent more than the previous week.

Fuel

For the week ending June 15, the U.S. average [diesel fuel price](#) increased 0.7 cents from the previous week to \$2.403 per gallon, 66.7 cents below the same week last year.

Feature Article/Calendar

Grain Transportation Update

Most movement and price indicators—across all modes—have been down so far in 2020, compared to the same period in 2019 and historical averages. However, all modes show signs of recovery. Grain carloads have remained stable in recent months, and rail performance has been strong. For the week ending June 13, year-to-date barge volume on the Mississippi River was higher than in the same week of 2019. Despite increases in recent weeks, ocean freight rates for shipping bulk grain and average diesel fuel prices are still low compared to historical averages. According to the June [WASDE](#), total exports of the three major grains (corn, wheat and soybeans) are expected to reach 5.2 billion bushels in 2020/21. This amounts to a 15-percent increase from 2019/20, which in turn, could raise the demand for export grain movements.

Rail: Low but Stable Carloads of Grain in Recent Weeks

Freight volumes by rail have remained considerably low. As of June 6 (the latest week of data), nearly all commodity groups were down from last year. According to the Association of American Railroads, total year-to-date (YTD) carload traffic (including grain) originated by U.S. Class I railroads is down 15 percent from last year, and intermodal traffic is down 11 percent. Total rail traffic was at its lowest during the week ending April 22, but has since risen 7 percent. Grain carloads are down 6 percent YTD from the same time last year, but have remained stable for the past 3 months. For the past 12 weeks, an average 21,500 carloads shipped per week, 5 percent lower than the same period last year.

Throughout the year, bids for grain shuttle service in the secondary auction market have been low. They were considerably below average in first quarter 2020, but in May and June (see [AgTransport Platform figure](#)), have been more in line with historical averages. March bids car/offers averaged -\$110 per car, or \$800 lower than the prior 3-year average. May bids/offers were \$130 below average. So far, bids/offers for the upcoming harvest months of September and October are \$120 to \$440 below the prior 3-year average, signaling the market anticipates more than adequate railcar supply to meet demand.

Compared to the same time in recent years, YTD rail performance metrics have been strong (see [AgTransport Platform Rail Dashboard](#)). Grain performance trends throughout 2020 appear to parallel the trends in total traffic discussed above. In April, average monthly speeds of grain unit trains peaked, and dwell times at terminals were at their lowest so far this year. Compared to earlier in the year, average grain train dwell times at origins were also low in April, but in May were at their lowest. Although still strong so far in June, these performance trends have reversed, as total traffic has increased. Compared to the May average, grain train speeds are up 4 percent so far in June, while dwell times at terminals are up 3 percent and grain dwell times at origins are up 21 percent.

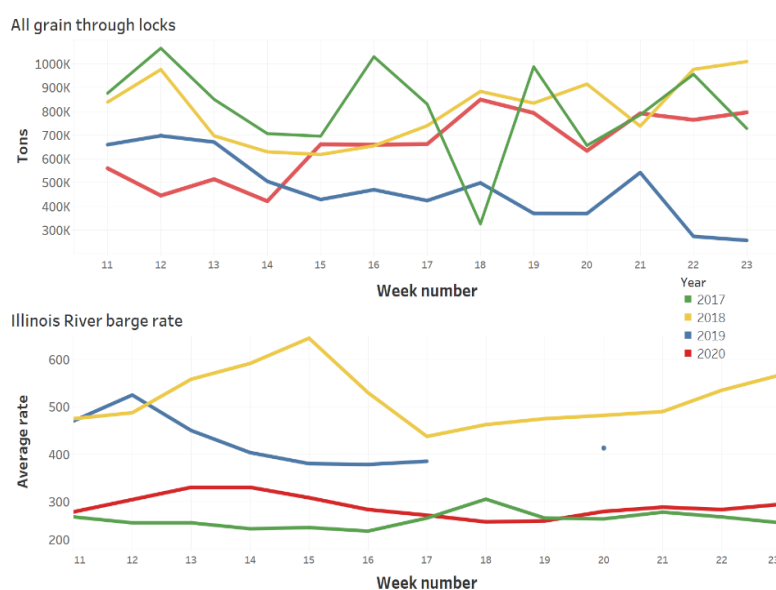
Barge Shipping Shows Signs of Recovery From Early Difficulties

Unhindered by major flooding issues (as occurred last year), barge volumes in second quarter 2020 significantly outperformed 2019 volumes. The mid- and upper-Mississippi River opening in week 14 led to increased traffic as the number of shippers with access to the river grew. For the week ending June 13, the total year-to-date volume was 36 percent higher than in the same week of 2019. Early 2020 highwater challenges have mostly subsided, with moderate or severe flooding less frequent and less pervasive than last year.

Although some systemwide issues with high water persist (most notably on the Ohio and Illinois Rivers), the issues are minor, compared to last year's. During the flooding of 2019, key portions of the Mississippi River and its tributaries closed, devastating barge traffic volumes. Figure 1 shows dramatically low volumes in spring and early summer 2019. While not exceeding the averages of 2017 and 2018, 2020 volumes are still higher than those of 2019.

Despite significantly higher volumes than in most equivalent weeks of 2019, 2020's rates have been lower than the prior 3-year average. The benchmark Illinois River rates in

Figure 1: Barge tonnage and rates



Source: USDA, Agricultural Marketing Service.

2020 are closer to those of 2017 than 2019. In 2017, high supply and fluid logistics in the barge industry allowed rates to remain low, even with some highwater challenges. Parallels to 2017 suggest, in 2020, also, the combination of relatively smooth navigation and an adequate supply of barges and towboats has more than accommodated increased shipping demand.

The closing of several major locks on the northern Illinois River at the end of June will affect shippers' ability to use that portion of the river, but the third quarter is typically a slow period for Illinois River traffic. Shippers may respond by moving the last of the old crop grain out of storage before the locks close. However, shippers will have other options, such as continued storage, trucking to below the closed locks, trucking to the Mississippi River, or shipping with rail.

Dry-Bulk Freight Rates Ticked Up, But Remained Relatively Low

Ocean freight rates for shipping bulk grain have increased within the last 3 weeks. However, the rates are still relatively low, compared to the beginning of the year (January 2, 2020), the same period in 2019 (year to year), and the 4-year average. During the week ending June 11, 2020, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$35.50 per metric ton (mt), down 22 percent decrease from January 2, 2020, down 18 percent from year to year, and down 6 percent from the 4-year average. Also, as of June 11, 2020, the cost of shipping from the Pacific Northwest (PNW) was \$18.75 per mt, down 25 percent decrease from January 2, 2020, down 21 percent year to year, and down 9 percent from the 4-year average. From the week ending March 5, 2020 to the week ending May 21, 2020, ocean freight rates decreased for 11 consecutive weeks. Since the week ending May 28, rates have increased slightly. The initial decline in ocean freight rates was caused by the dip in the global trade of dry bulk commodities. However, according to the June 11 *Transportation and Export Report* by O'Neil Commodity Consulting, cargo demand has improved since the last week of May.

2020 Average Diesel Fuel Prices Increasing but still Low

Average U.S. on-highway diesel fuel prices are down 67.6 cents per gallon since the beginning of the year (according to the Department of Energy's Energy Information Administration (EIA)). The average diesel fuel price has been falling since the beginning of the year and hit its lowest record since September 26, 2016 at the price of \$2.386 per gallon as of the week ending May 18. The average diesel price has since ticked up 1.7 cents since then to \$2.403 per gallon during the week ending June 15. Demand for fuel has been slow following the COVID-19 outbreak. According to [EIA](#), Brent crude oil prices rose in May due to the tightening in the global oil market balance. Increased global oil demand and a high adherence to production cuts by the Organization of the Petroleum Exporting Countries (OPEC) and partner countries (OPEC+) drove the price increase. In the June 2020 [Short-Term Energy Outlook](#), EIA forecasts that Brent crude oil will increase in the second half of 2020.

Outlook for 2020/21

According to the June [WASDE](#), total exports of the three major grains are expected to reach 5.2 billion bushels in 2020/21, up 15 percent from 2019/20 (see table). Demand for U.S. wheat has declined because of uncompetitive prices in many international markets. However, foreign demand for corn is expected to recover as a result of the large U.S. crop and competitive prices. Demand for U.S. soybeans is expected to recover as 16 well.

In 2020/21, U.S. corn exports are projected to increase by 21 percent from 2019/20. However, U.S. corn exports are still lower than average because of increasing competition from South America and Ukraine. Soybean exports for 2020/21 are expected to increase by 17 percent from 2019/20, and wheat exports are not expected to change (see table).

Table 1. Major grains: production and use, June 2020, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2020/21 (Projected)					
Production	15,995	4,125	1,877	21,997	15.2%
Exports	2,150	2,050	950	5,150	15.1%
Domestic use	12,650	2,280	1,125	16,055	4.9%
Ending stocks	3,323	395	925		
Total use	14,800	4,330	2,075		
Stocks/use	22.5%	9.1%	44.6%		
United States 2019/20 (Estimated)					
Production	13,617	3,552	1,920	19,089	-7.6%
Exports	1,775	1,748	950	4,473	-5.8%
Domestic use	12,005	2,143	1,157	15,305	-1.6%
Ending stocks	2,103	585	983		
Total use	13,780	3,891	2,122		
Stocks/use	15.3%	15.0%	46.3%		
2018/19					
Production	14,340	4,428	1,885	20,653	
Exports	2,065	1,748	936	4,749	
Domestic use	12,223	2,223	1,103	15,549	
Ending stocks	2,221	909	1,080		
Total use	14,288	3,971	2,039		
Stocks/use	15.5%	22.9%	53.0%		

Source: USDA, World Agricultural Supply and Demand Estimates, June 2020

Year-to-date (YTD 2019/20) export sales commitments of corn are 15 percent below the same time last year because of slow demand and low prices. YTD 2019/20 soybean export commitments are likewise down—7 percent below last year. The beginning of the new marketing year (2020/21) commitments for wheat are down 5 percent from 2019/20 ([GTR, Tables 13-15](#)). GTRContactUs@usda.gov

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
06/17/20	161	n/a	226	149	159	133
06/10/20	161	n/a	221	163	157	131

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); 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)

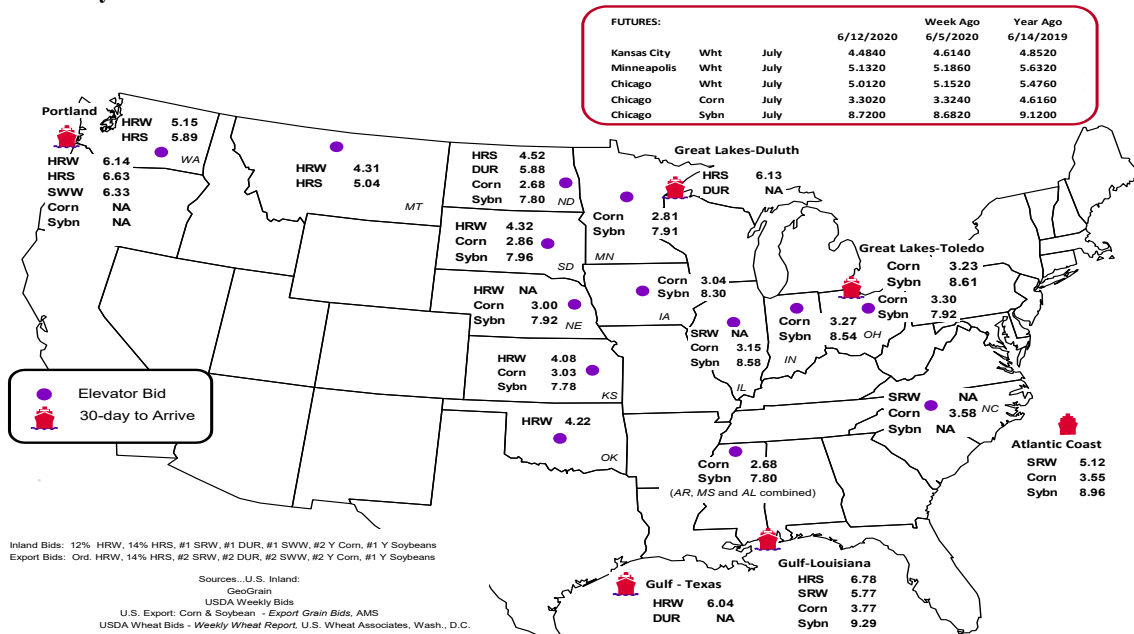
Commodity	Origin-destination	6/12/2020	6/5/2020
Corn	IL-Gulf	-0.62	-0.62
Corn	NE-Gulf	-0.77	-0.78
Soybean	IA-Gulf	-0.99	-0.97
HRW	KS-Gulf	-1.96	-1.95
HRS	ND-Portland	-2.11	-2.18

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)¹

For the week ending	Mississippi		Pacific	Atlantic &	Total	Week ending	Cross-border Mexico ³
	Gulf	Texas Gulf	Northwest	East Gulf			
6/10/2020 ^p	232	844	4,862	279	6,217	6/6/2020	2,015
6/03/2020 ^r	5	1,519	4,681	191	6,396	5/30/2020	2,029
2020 YTD ^r	10,074	20,095	111,494	4,852	146,515	2020 YTD	54,536
2019 YTD ^r	21,303	28,331	129,276	8,246	187,156	2019 YTD	53,717
2020 YTD as % of 2019 YTD	47	71	86	59	78	% change YTD	102
Last 4 weeks as % of 2019 ²	29	85	99	85	85	Last 4wks. % 2019	101
Last 4 weeks as % of 4-year avg. ²	66	90	85	94	85	Last 4wks. % 4 yr.	91
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

¹Data is incomplete as it is voluntarily provided.

²Compared with same 4-weeks in 2019 and prior 4-year average.

³Cross-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.

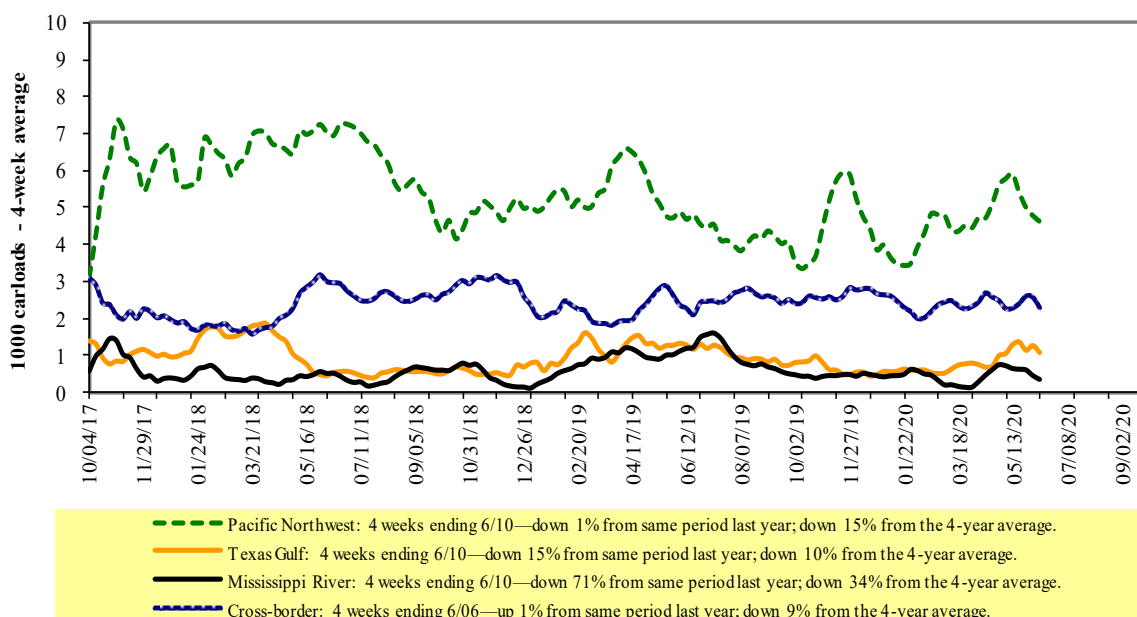
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 6/6/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,633	2,297	11,057	1,015	5,024	21,026	4,488	4,633
This week last year	1,601	2,771	11,002	1,311	4,529	21,214	4,563	4,058
2020 YTD	39,175	53,317	245,716	23,931	113,638	475,777	89,837	100,122
2019 YTD	44,713	64,807	252,397	25,702	117,354	504,973	100,349	99,146
2020 YTD as % of 2019 YTD	88	82	97	93	97	94	90	101
Last 4 weeks as % of 2019*	91	77	97	88	112	97	99	117
Last 4 weeks as % of 3-yr. avg.**	92	82	89	97	105	92	106	109
Total 2019	91,611	137,193	568,369	58,527	260,269	1,115,969	212,533	235,892

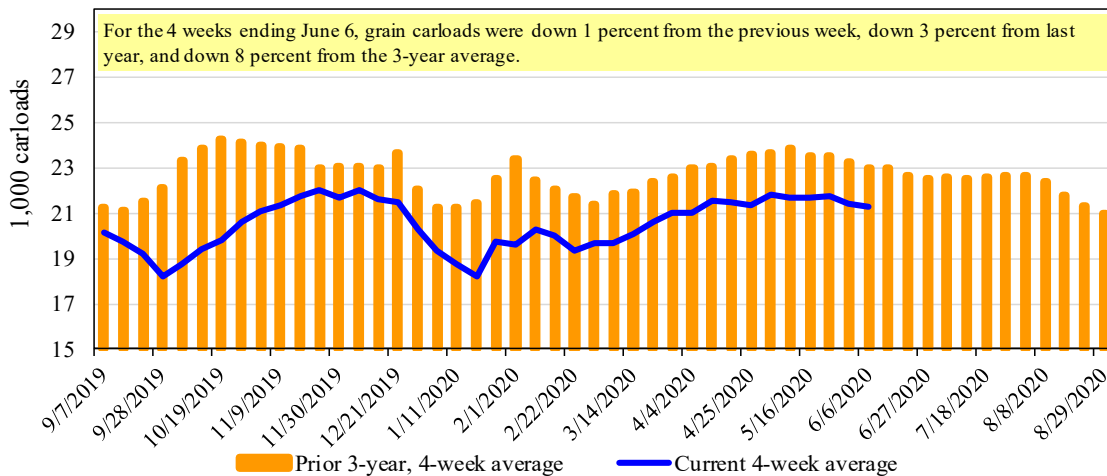
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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 offerings¹ (\$/car)²

For the week ending: 6/11/2020		Delivery period							
		Jun-20	Jun-19	Jul-20	Jul-19	Aug-20	Aug-19	Sep-20	Sep-19
BNSF ³	COT grain units	0	no offer	0	0	0	0	no bids	0
	COT grain single-car	0	no offer	0	0	0	0	0	35
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no bids	n/a	n/a
	GCAS/Region 2	no offer	no offer	no bid	no offer	no bid	no bids	n/a	n/a

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

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

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

⁴UP - GCAS = Union Pacific Railroad Grain Car Allocation System.

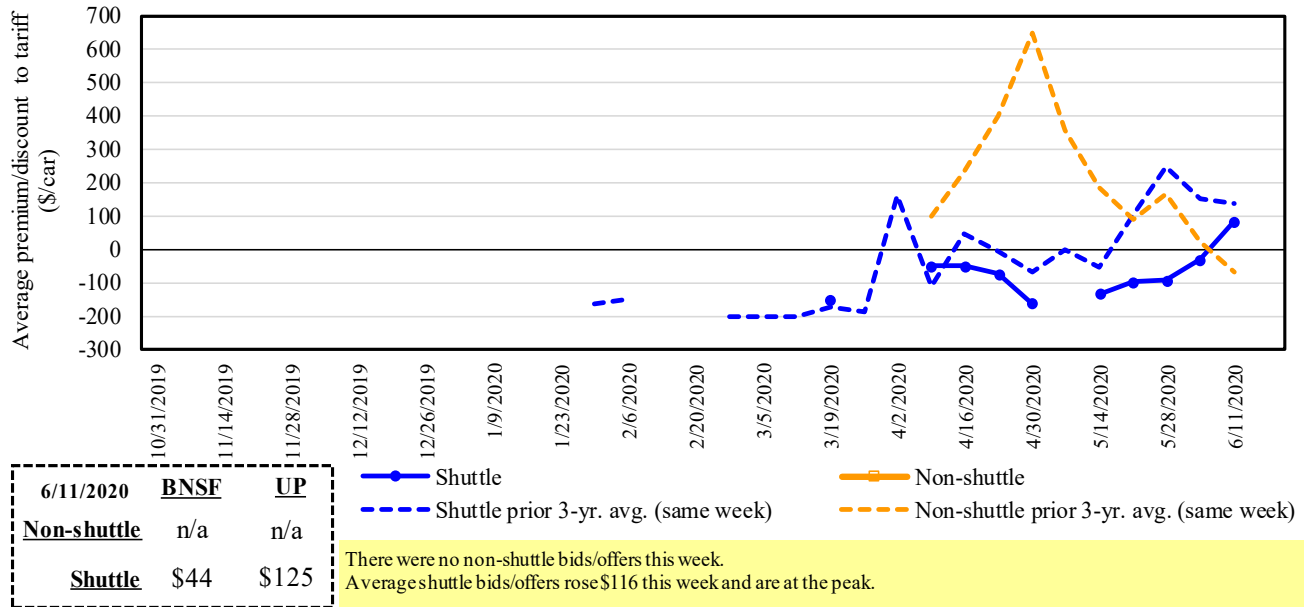
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

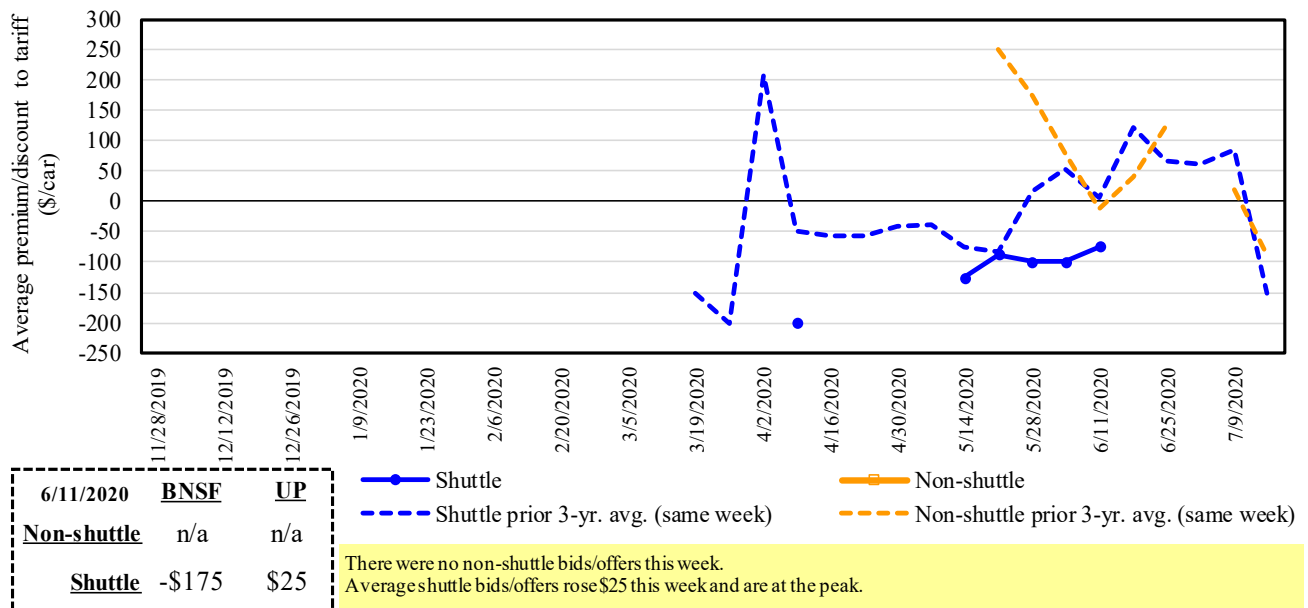
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

Figure 4
Bids/offers for railcars to be delivered in June 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.

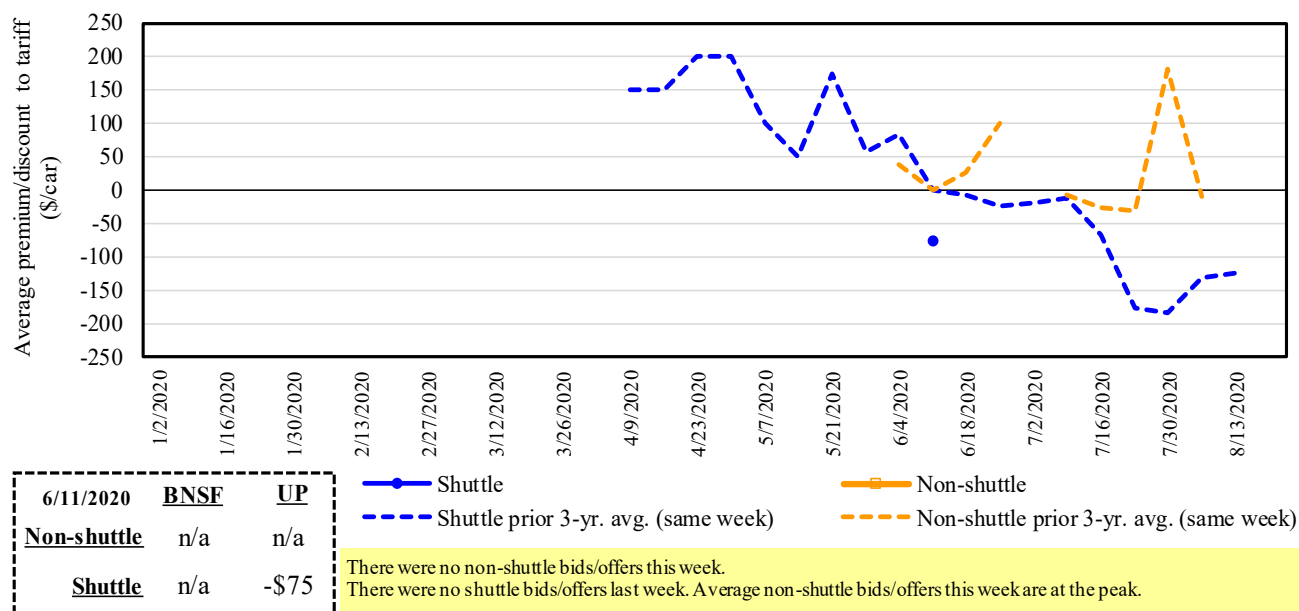
Figure 5
Bids/offers for railcars to be delivered in July 2020, secondary market



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 August 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.

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending: 6/11/2020		Delivery period					
		Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20
Non-shuttle	BNSF-GF	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
	UP-Pool	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
Shuttle	BNSF-GF	44	(175)	n/a	(6)	300	300
	Change from last week	119	(25)	n/a	n/a	n/a	n/a
	Change from same week 2019	(206)	(125)	n/a	n/a	n/a	n/a
	UP-Pool	125	25	(75)	(88)	250	n/a
	Change from same week 2019	(75)	100	n/a	n/a	n/a	n/a

¹Average 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 shipments¹

June 2020	Origin region ³	Destination region ³	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per:		Percent change Y/Y ⁴
					metric ton	bushel ²	
Unit train							
Wheat	Wichita, KS	St. Louis, MO	\$3,983	\$40	\$39.96	\$1.09	-2
	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	0
	Wichita, KS	New Orleans, LA	\$4,525	\$71	\$45.64	\$1.24	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,976	\$0	\$69.28	\$1.89	0
	Colby, KS	Galveston-Houston, TX	\$4,801	\$78	\$48.45	\$1.32	-3
	Amarillo, TX	Los Angeles, CA	\$5,121	\$109	\$51.93	\$1.41	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$80	\$39.53	\$1.00	-5
	Toledo, OH	Raleigh, NC	\$6,816	\$0	\$67.69	\$1.72	4
	Des Moines, IA	Davenport, IA	\$2,415	\$17	\$24.15	\$0.61	6
	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	\$50	\$38.23	\$0.97	-4
	Des Moines, IA	Los Angeles, CA	\$5,680	\$146	\$57.85	\$1.47	-5
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$52	\$36.58	\$1.00	-4
	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	\$80	\$46.93	\$1.28	-5
Shuttle train							
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	0
	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
	Colby, KS	Portland, OR	\$6,012	\$128	\$60.97	\$1.66	-3
	Corn	Minneapolis, MN	Portland, OR	\$5,180	\$0	\$51.44	\$1.31
Sioux Falls, SD		Tacoma, WA	\$5,140	\$0	\$51.04	\$1.30	0
Champaign-Urbana, IL		New Orleans, LA	\$3,820	\$80	\$38.73	\$0.98	-3
Lincoln, NE		Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
Des Moines, IA		Amarillo, TX	\$4,220	\$63	\$42.53	\$1.08	1
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	\$93	\$49.33	\$1.34	-1
	Toledo, OH	Huntsville, AL	\$4,805	\$0	\$47.72	\$1.30	4
	Grand Island, NE	Portland, OR	\$5,260	\$131	\$53.53	\$1.46	-11

¹A 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.

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

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

⁴Percentage 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

Date: June 2020			Tariff rate per car ¹	Fuel surcharge per car ²	Tariff rate plus fuel surcharge per:		Percent change ⁴ Y/Y
Commodity	Origin state	Destination region			metric ton ³	bushel ³	
Wheat	MT	Chihuahua, CI	\$7,509	\$0	\$76.72	\$2.09	3
	OK	Cuautitlan, EM	\$6,775	\$56	\$69.79	\$1.90	1
	KS	Guadalajara, JA	\$7,534	\$329	\$80.34	\$2.18	-1
	TX	Salinas Victoria, NL	\$4,329	\$33	\$44.57	\$1.21	-1
Corn	IA	Guadalajara, JA	\$8,902	\$273	\$93.75	\$2.38	0
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	3
	NE	Queretaro, QA	\$8,278	\$112	\$85.73	\$2.18	-1
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,643	\$109	\$79.21	\$2.01	-1
	SD	Torreón, CU	\$7,690	\$0	\$78.57	\$1.99	3
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$256	\$89.94	\$2.45	-2
	NE	Guadalajara, JA	\$9,172	\$265	\$96.42	\$2.62	-1
	IA	El Castillo, JA	\$9,490	\$0	\$96.97	\$2.64	4
	KS	Torreón, CU	\$7,964	\$179	\$83.20	\$2.26	0
Sorghum	NE	Celaya, GJ	\$7,772	\$239	\$81.85	\$2.08	-1
	KS	Queretaro, QA	\$8,108	\$70	\$83.55	\$2.12	0
	NE	Salinas Victoria, NL	\$6,713	\$56	\$69.16	\$1.75	0
	NE	Torreón, CU	\$7,092	\$162	\$74.12	\$1.88	-2

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.

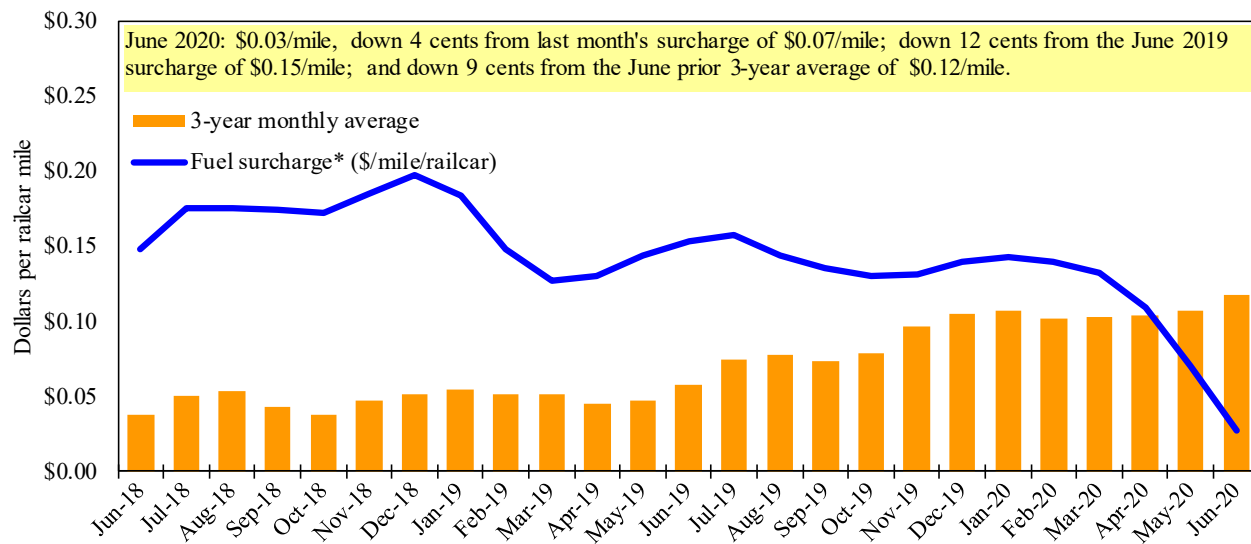
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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

⁴Percentage change 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 average¹

¹ 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.

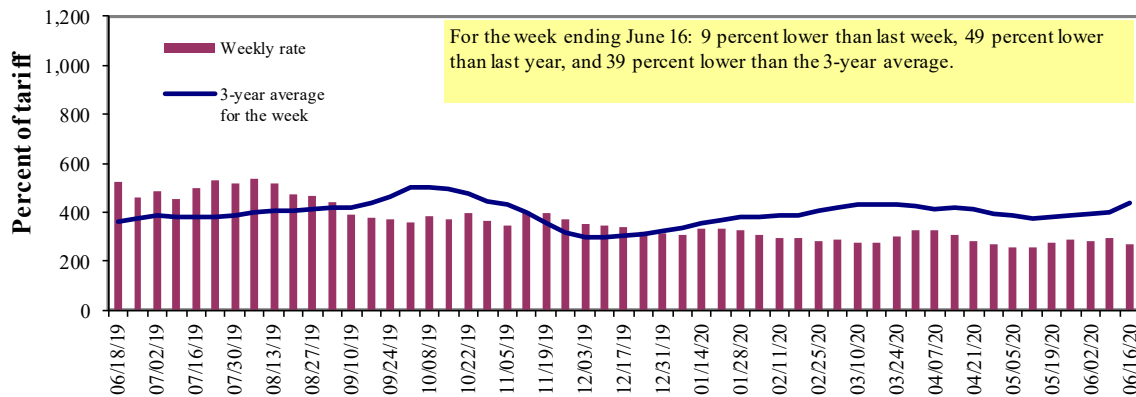
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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^{1,2}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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
Rate¹	6/16/2020	369	308	268	191	184	184	181
	6/9/2020	353	300	294	191	181	181	180
\$/ton	6/16/2020	22.84	16.39	12.44	7.62	8.63	7.43	5.68
	6/9/2020	21.85	15.96	13.64	7.62	8.49	7.31	5.65
Current week % change from the same week:								
	Last year	-	-	-49	-38	-32	-32	-30
	3-year avg. ²	-17	-23	-39	-36	-37	-38	-29
Rate¹	July	369	311	-	194	189	189	184
	September	403	376	-	357	369	369	353

¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-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

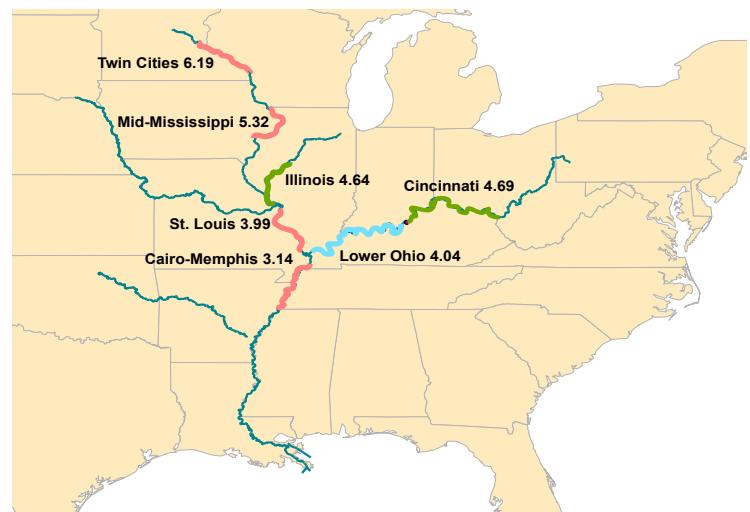
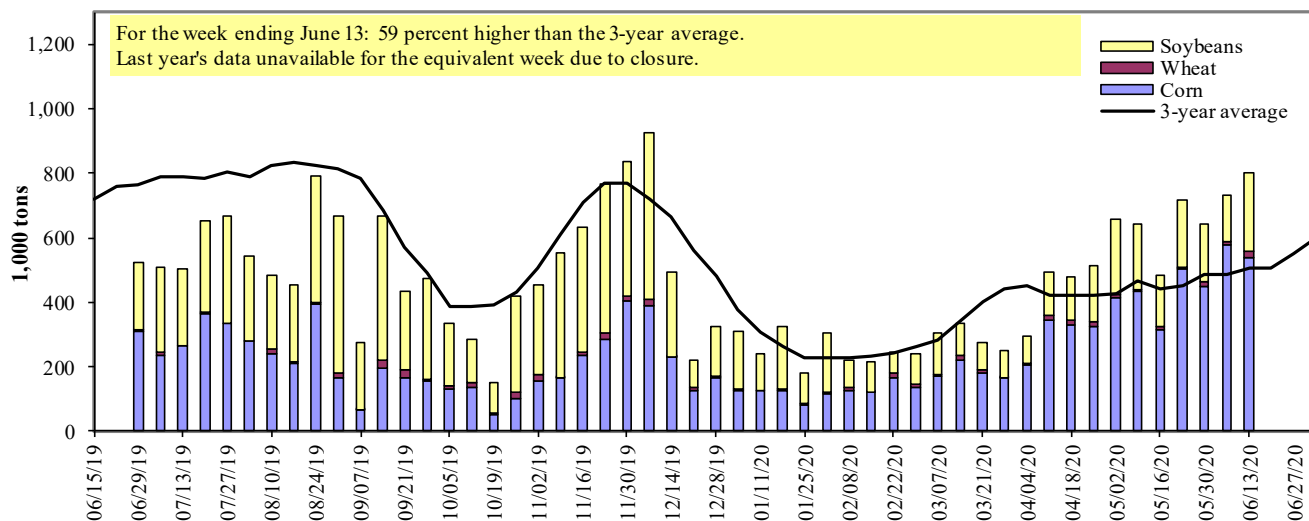


Figure 10

Barge movements on the Mississippi 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)

For the week ending 06/13/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	298	6	77	0	382
Winfield, MO (L25)	368	0	120	0	488
Alton, IL (L26)	570	21	254	0	845
Granite City, IL (L27)	538	21	242	0	801
Illinois River (La Grange)	241	13	148	0	401
Ohio River (Olmsted)	46	0	38	0	84
Arkansas River (L1)	0	27	32	0	59
Weekly total - 2020	584	47	312	0	943
Weekly total - 2019	181	17	132	0	329
2020 YTD ¹	8,378	754	5,294	51	14,477
2019 YTD ¹	5,522	876	4,133	69	10,600
2020 as % of 2019 YTD	152	86	128	73	137
Last 4 weeks as % of 2019 ²	299	259	155	279	235
Total 2019	12,780	1,631	14,683	154	29,247

¹ 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.

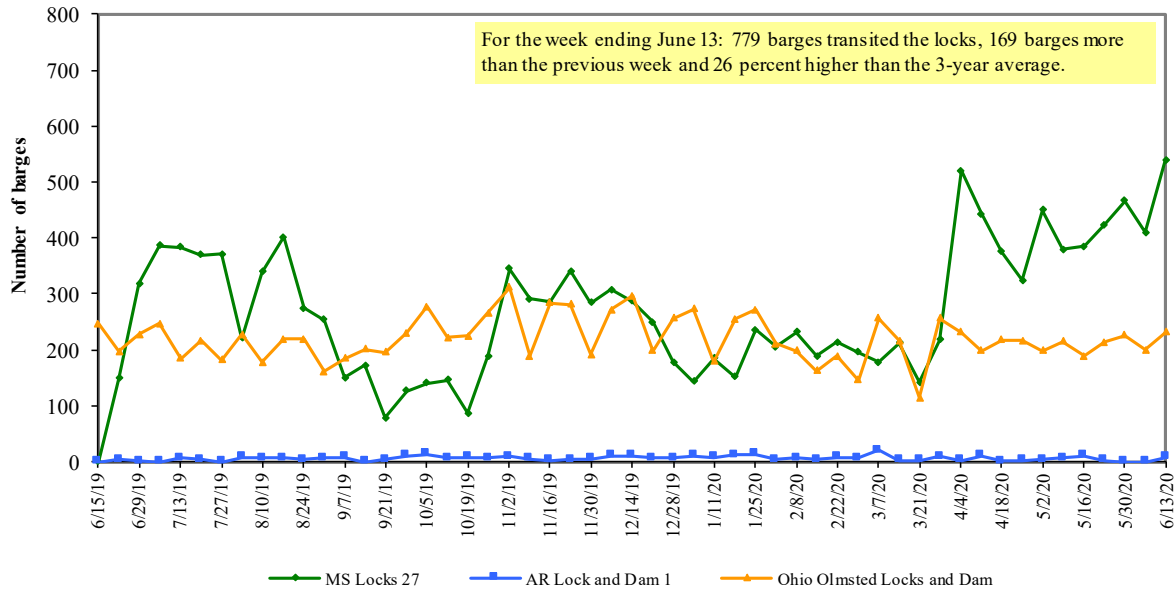
² As a percent of same period in 2019.

Note: Total may not add exactly because of rounding. Starting from 11/24/2018, weekly movement through Ohio 52 is replaced by Olmsted.

Source: U.S. Army Corps of Engineers.

Figure 11

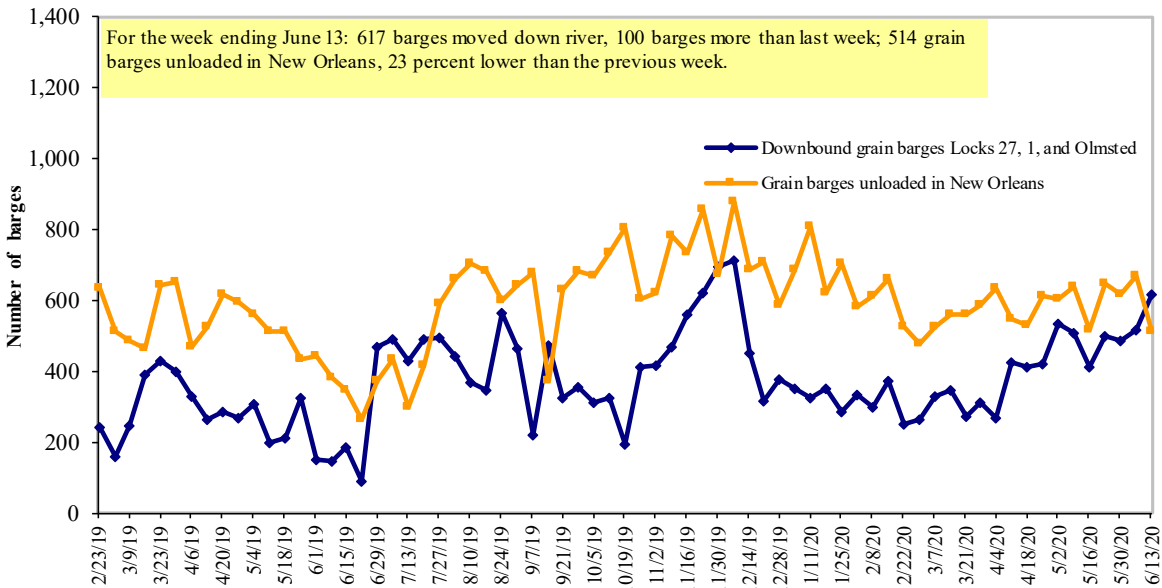
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 6/15/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.501	0.000	-0.598
	New England	2.628	-0.001	-0.525
	Central Atlantic	2.673	0.001	-0.609
	Lower Atlantic	2.359	0.000	-0.605
II	Midwest	2.256	0.016	-0.701
III	Gulf Coast	2.174	0.002	-0.646
IV	Rocky Mountain	2.346	-0.005	-0.726
	West Coast	2.930	0.012	-0.736
V	West Coast less California	2.579	0.001	-0.659
	California	3.218	0.020	-0.788
	Total	United States	2.403	0.007

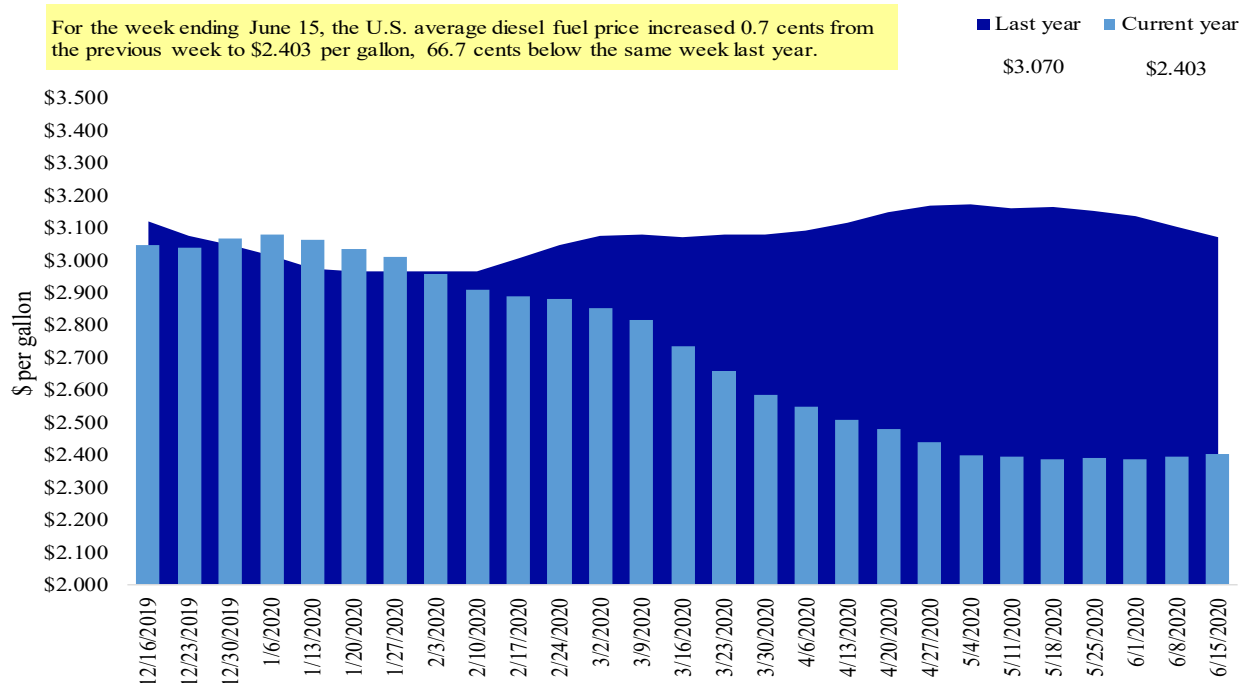
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending June 15, the U.S. average diesel fuel price increased 0.7 cents from the previous week to \$2.403 per gallon, 66.7 cents below the same week last year.



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				
Export balances¹									
6/4/2020	1,976	530	1,752	1,137	262	5,656	10,881	7,442	23,979
This week year ago	2,430	854	1,347	948	189	5,768	7,148	11,266	24,182
Cumulative exports-marketing year²									
2019/20 YTD	122	2	18	9	21	172	30,252	36,219	66,643
2018/19 YTD	191	30	78	58	23	380	41,259	35,653	77,292
YTD 2019/20 as % of 2018/19	64	7	23	16	93	45	73	102	86
Last 4 wks. as % of same period 2018/19*	49	30	95	84	59	63	165	61	92
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

¹ Current unshipped (outstanding) export sales to date.

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

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 importers¹ of U.S. corn

For the week ending 6/4/2020	Total commitments ²			% change current MY from last MY	Exports ³ 3-yr. avg. 2016-18
	2020/21 next MY	2019/20 current MY	2018/19 last MY*		
		- 1,000 mt -			
Mexico	1,689	13,645	15,043	(9)	14,659
Japan	534	9,317	11,613	(20)	11,955
Korea	0	2,429	3,694	(34)	4,977
Colombia	20	4,154	4,555	(9)	4,692
Peru	40	209	1,992	(89)	2,808
Top 5 importers	2,283	29,755	36,897	(19)	39,091
Total U.S. corn export sales	3,439	41,133	48,407	(15)	54,024
% of projected exports	6%	91%	92%		
Change from prior week ²	26	661	169		
Top 5 importers' share of U.S. corn export sales	66%	72%	76%		72%
USDA forecast June 2020	54,707	45,165	52,545	(14)	
Corn use for ethanol USDA forecast, June 2020	132,080	124,460	136,601	(9)	

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

² 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.

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

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

Source: USDA, Foreign Agricultural Service.

Table 14

Top 5 importers¹ of U.S. soybeans

For the week ending 6/4/2020	Total commitments ²			% change current MY from last MY	Exports ³ 3-yr. avg. 2016-18
	2020/21 next MY	2019/20 current MY	2018/19 last MY*		
		- 1,000 mt -			- 1,000 mt -
China	2,015	15,283	13,630	12	25,733
Mexico	501	4,526	4,729	(4)	4,271
Indonesia	0	1,881	2,025	(7)	2,386
Japan	87	2,322	2,351	(1)	2,243
Egypt	0	3,238	2,535	28	1,983
Top 5 importers	2,603	27,250	25,270	8	36,616
Total U.S. soybean export sales	4,152	43,661	46,919	(7)	53,746
% of projected exports	7%	97%	99%		
change from prior week ²	1,213	1,004	237		
Top 5 importers' share of U.S. soybean export sales	63%	62%	54%		68%
USDA forecast, June 2020	55,858	44,959	47,629	94	

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

²Cumulative 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.

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

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

Source: USDA, Foreign Agricultural Service.

Table 15

Top 10 importers¹ of all U.S. wheat

For the week ending 6/4/2020	commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 next MY	2019/20 current MY		
		- 1,000 mt -		- 1,000 mt -
Mexico	366	761	(52)	3,213
Philippines	976	737	32	2,888
Japan	592	525	13	2,655
Nigeria	197	481	(59)	1,433
Korea	438	307	43	1,372
Indonesia	179	284	(37)	1,195
Taiwan	261	245	7	1,175
Thailand	169	196	(14)	727
Italy	140	80	75	622
Colombia	108	156	(30)	618
Top 10 importers	3,059	3,009	2	12,684
Total U.S. wheat export sales	5,829	6,148	(5)	24,388
% of projected exports	23%	23%		
change from prior week ²	270	48		
Top 10 importers' share of U.S. wheat export sales	52%	49%		52%
USDA forecast, June 2020	25,886	26,294	(2)	

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

²Cumulative 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.

³FAS marketing year final reports (carryover plus accumulated export); yr. = year; avg. = average.

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 06/11/20	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.	
Pacific Northwest									
Wheat	333	278	120	7,176	6,364	113	149	117	13,961
Corn	278	293	95	4,424	6,057	73	141	78	7,047
Soybeans	0	0	n/a	2,736	4,535	60	1	1	11,969
Total	611	571	107	14,335	16,955	85	111	78	32,977
Mississippi Gulf									
Wheat	50	69	72	1,626	2,497	65	97	65	4,448
Corn	475	648	73	13,635	12,226	112	132	99	20,763
Soybeans	243	193	126	9,915	11,125	89	71	87	31,398
Total	768	911	84	25,176	25,847	97	105	93	56,609
Texas Gulf									
Wheat	40	115	35	1,838	3,320	55	58	79	6,009
Corn	0	30	0	374	362	103	217	116	640
Soybeans	0	0	n/a	7	0	n/a	n/a	0	2
Total	40	145	27	2,219	3,682	60	65	79	6,650
Interior									
Wheat	44	36	124	1,045	795	131	98	108	1,987
Corn	141	169	83	3,696	3,448	107	96	90	7,857
Soybeans	104	88	118	2,989	3,046	98	90	95	7,043
Total	290	293	99	7,729	7,288	106	94	94	16,887
Great Lakes									
Wheat	0	0	n/a	204	409	50	13	17	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	44	0	n/a	61	145	42	48	54	493
Total	44	0	n/a	264	554	48	25	27	1,844
Atlantic									
Wheat	0	4	0	5	32	17	n/a	n/a	37
Corn	0	0	n/a	8	75	11	0	0	99
Soybeans	5	7	76	393	593	66	37	44	1,353
Total	5	11	47	406	700	58	34	43	1,489
U.S. total from ports*									
Wheat	467	502	93	11,893	13,417	89	98	94	27,781
Corn	894	1,141	78	22,136	22,167	100	128	90	36,417
Soybeans	396	288	137	16,100	19,444	83	59	66	52,258
Total	1,758	1,932	91	50,129	55,027	91	97	85	116,457

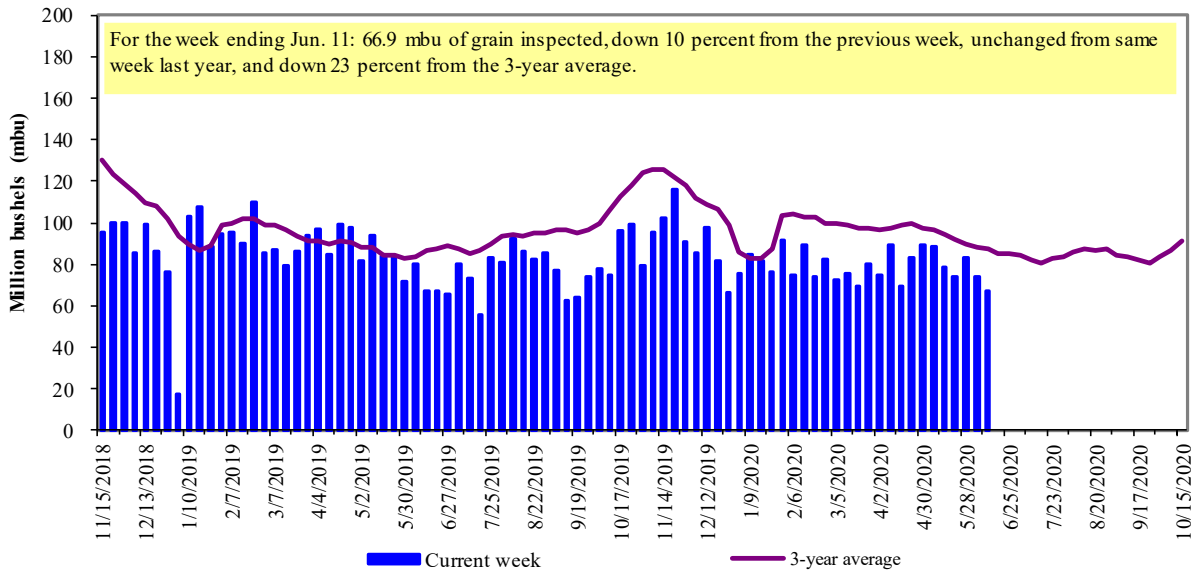
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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 55 percent of the U.S. export grain shipments departed through the U.S. Gulf region in 2019.

Figure 14

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

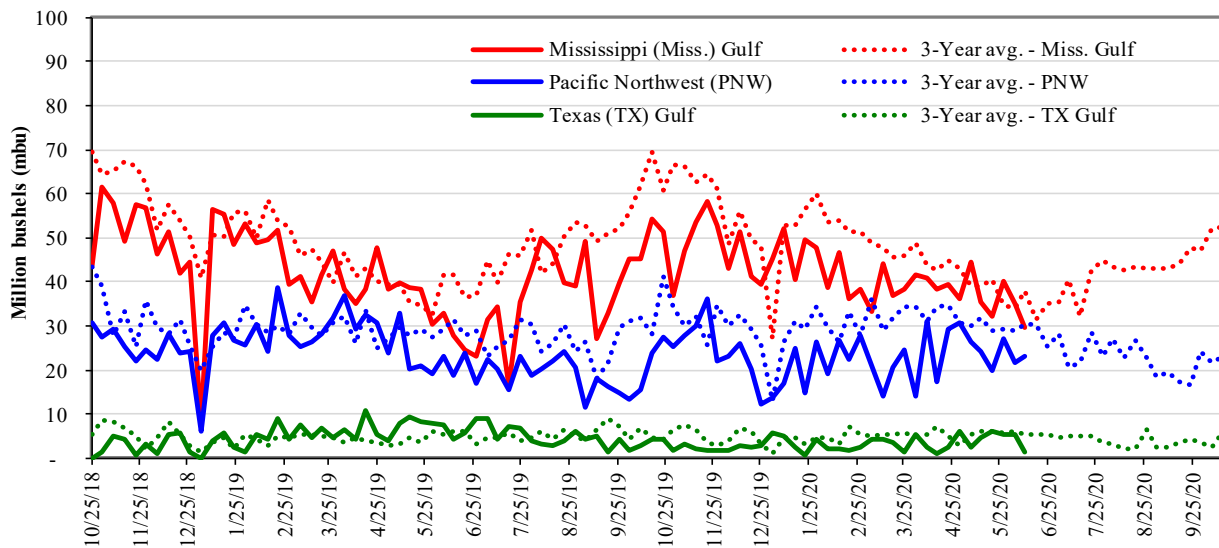


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

U.S. Grain inspections: U.S. Gulf and PNW¹ (wheat, corn, and soybeans)



Week ending 06/11/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 29.5	Last wk:	down 16	down 73	down 24	up 7
PNW: 23.2	Last Year (same wk):	up 6	down 67	down 4	up 22
TX Gulf: 1.5	3-yr avg.(4-wk. mov. Avg):	down 20	down 75	down 27	down 21

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

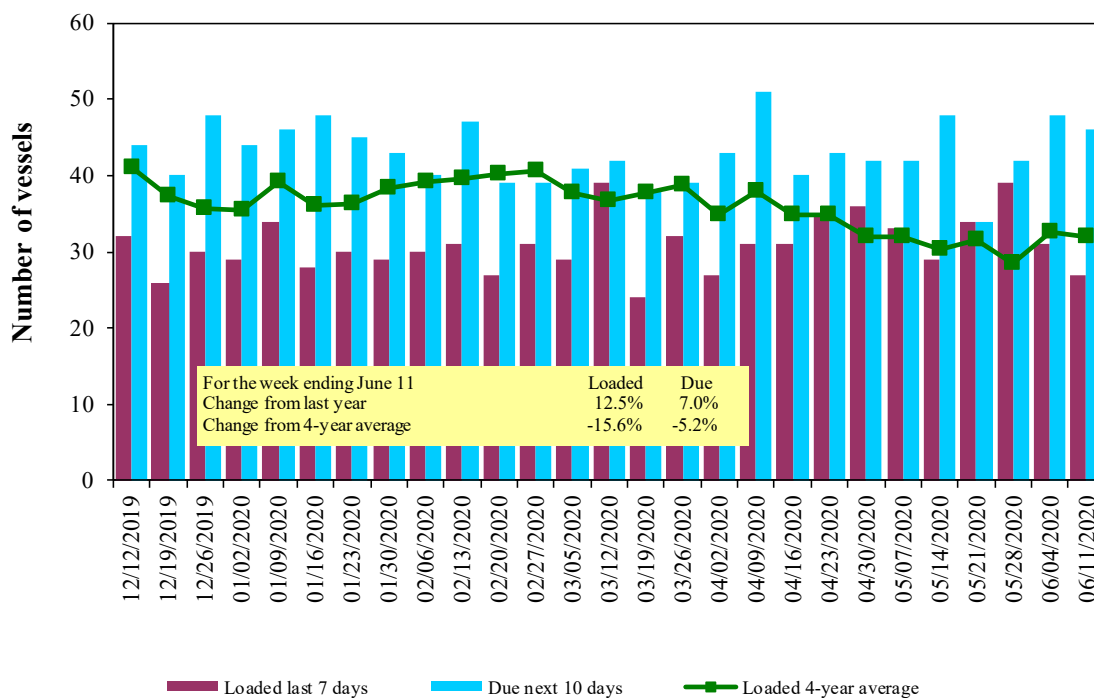
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
6/11/2020	29	27	46	24
6/4/2020	35	31	48	18
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

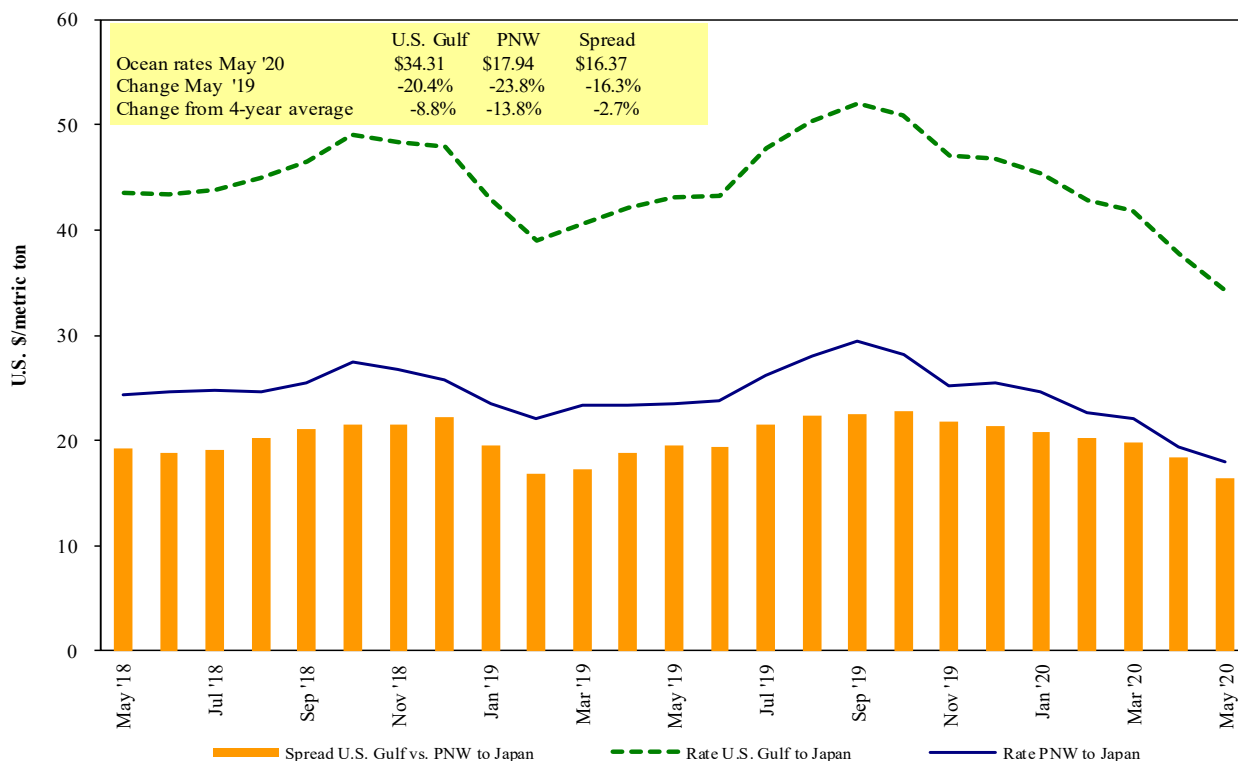
U.S. Gulf¹ vessel loading activity



¹U.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 06/13/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Djibouti	Wheat	Jun 5/15	30,000	131.75*
U.S. Gulf	Djibouti	Sorghum	Apr 17/27	45,730	105.75*
U.S. Gulf	Pt Sudan	Sorghum	Jun 5/15	33,370	99.50
PNW	Yemen	Wheat	Jun 5/15	40,000	40.89
PNW	Yemen	Wheat	Jun 5/15	30,000	44.89
PNW	Yemen	Wheat	May 18/26	20,000	55.75*
PNW	Yemen	Wheat	May 4/14	49,630	36.50
PNW	Yemen	Wheat	Mar 26/Apr 6	35,000	51.84*
PNW	Taiwan	Wheat	Apr 27/May 11	50,700	29.40
Brazil	China	Heavy grain	Jun 25/30	65,000	23.50
Brazil	China	Heavy grain	May 20/30	69,000	21.00
Brazil	China	Heavy grain	May 19/29	66,000	21.50
Brazil	SE Asia	Corn	Jul 1/6	66,000	22.75
Brazil	China	Heavy grain	May 1/31	60,000	33.25 op 33.00
Brazil	China	Heavy grain	Apr 2/16	66,000	30.75
Brazil	China	Heavy grain	Mar 1/10	65,000	32.00
Brazil	Pakistan	Heavy grain	Jun 19/29	70,000	21.85

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

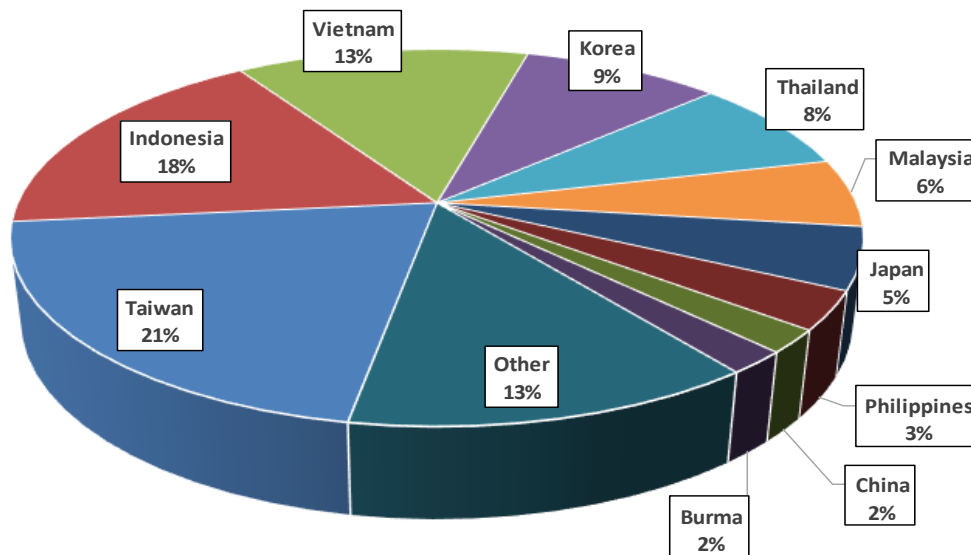
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

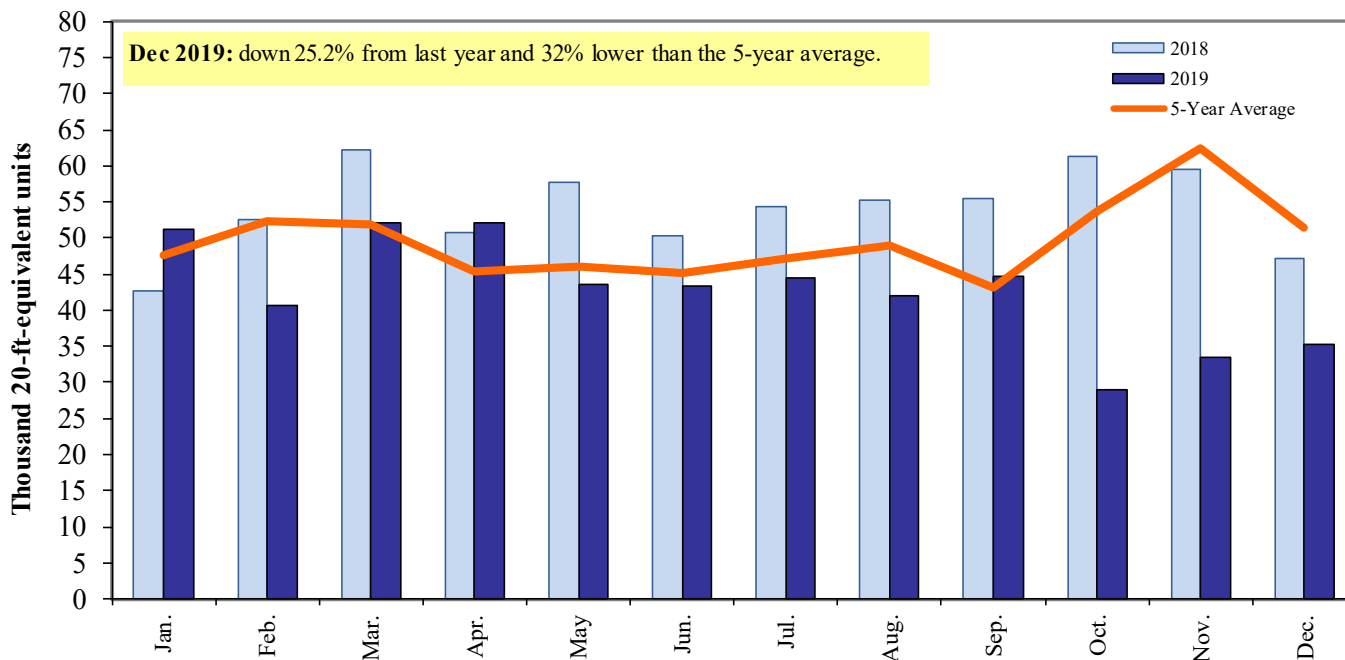
Figure 18
Top 10 destination markets for U.S. containerized grain exports, 2019



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, 1201, 120100, 120190, 120810, 230210, 230310, 230330, and 230990.

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

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