



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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August 6, 2020

WEEKLY HIGHLIGHTS

STB Announces Final Rule on Railroad Market Dominance

The Surface Transportation Board ([STB](#)) issued its final rule on evaluating market dominance in rate reasonableness proceedings. Per the final rule, a complainant must demonstrate these seven conditions to have a prima facie showing of market dominance: (1) the movement has a revenue-to-variable cost ratio of 180 percent or greater; (2) the movement would exceed 500 highway miles between origin and destination; (3) there is no intramodal competition from other railroads; (4) there is no barge competition; (5) there is no pipeline competition; (6) the complainant has used trucks for 10 percent or less of its volume (by tonnage), subject to the rate at issue over a 5-year period; and (7) the complainant has no practical build-out alternative (regardless of transportation mode), because of physical, regulatory, financial, or other issues (or combination of issues). Complainants who cannot demonstrate the presence of these seven conditions still retain the option of making a traditional market dominance case, which involves a more thorough qualitative analysis of whether there are any feasible transportation alternatives sufficient to constrain the railroad's rates. Either approach provides opportunity to defendant railroads to rebut a complainant's evidence. The final rule will be effective on September 5, 2020.

ASCE Releases Report on the Effects of Covid-19 on America's Infrastructure

The American Society of Civil Engineers (ASCE) released a [status report](#) on the pandemic's effects on the Nation's bridges, dams, inland waterways, ports, and roads. ASCE projects a 30-percent revenue decline in the next 18 months for State Departments of Transportation (DOTs) because of declining gas tax revenue. To maintain bridges, roads, and transit systems as safe and reliable and aid the Nation's long-term economic recovery, ASCE recommends Congress provide \$50 billion in immediate, short-term relief for State DOTs. ASCE's recommendations to Congress include quickly enacting various other long-term infrastructure-enhancing measures as well. The 2021 ASCE Infrastructure Report Card will be released in February 2021.

Organizations Urge Governor To Address California's Declining Port Market Share

A broad coalition of trade associations sent a [letter](#) urging Governor Newsom and the California Legislature to take action to prevent continued loss of California's port market share. The group notes the West Coast ports' market share has declined 19.4 percent since 2006. To address the major causes of the market share loss, the letter proposes promoting California ports, meeting the challenge from East and Gulf Coast States' ports, evaluating current State and regional regulations, and reconciling State laws encouraging environmental and efficiency mandates with the need to retrain workers.

Snapshots by Sector

Export Sales

For the week ending July 23, **unshipped balances** of wheat, corn, and soybeans totaled 18.8 million metric tons (mmt). This represented a 12-percent increase in outstanding sales from the same time last year. Net **corn export sales** were -0.029 mmt, down significantly from last week. Net **soybean export sales** were 0.258 mmt, up 21 percent from the previous week. Net **wheat export sales** were 0.677 mmt, up 10 percent from the previous week.

Rail

U.S. Class I railroads originated 20,509 **grain carloads** during the week ending July 25. This was an 8-percent decrease from the previous week, 8 percent less than last year, and 8 percent lower than the 3-year average.

Average August shuttle **secondary railcar** bids/offers (per car) were \$556 above tariff for the week ending July 30. This was \$284 more than last week and \$760 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending August 1, **barge grain movements** totaled 890,050 tons. This was 6 percent more than the previous week and 31 percent more than the same period last year.

For the week ending August 1, 557 grain barges **moved down river**—32 more barges than the previous week. There were 616 grain barges **unloaded in New Orleans**, 15 percent more than the previous week.

Ocean

For the week ending July 30, 25 **oceangoing grain vessels** were loaded in the U.S. Gulf—27 percent fewer than the same period last year. Within the next 10 days (starting July 31), 35 vessels were expected to be loaded—31 percent fewer than the same period last year.

As of July 30, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$41.50. This was unchanged from the previous week. The rate from the Pacific Northwest to Japan was \$21.75 per mt, 5 percent more than the previous week.

Fuel

For the week ending August 3, the U.S. average **diesel fuel price** decreased 0.3 cents from the previous week to \$2.424 per gallon, 60.8 cents below the same week last year.

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Second-Quarter 2020 Wheat Transportation and Landed Costs Down From First Quarter and Last Year

Second-quarter 2020 wheat transportation costs decreased from the previous quarter (quarter to quarter) and from second quarter 2019 (year to year) for shipping from Kansas (KS) and North Dakota (ND) to Japan—both via the Pacific Northwest (PNW route) and via the U.S. Gulf (Gulf route). Likewise, both quarter to quarter and year to year, landed costs (farm value plus transportation costs) decreased for both routes and both States. Both quarter-to-quarter and year-to-year decreases in total landed costs were due to lower overall transportation costs and lower farm values, except in Kansas, which had higher farm values, (tables 1 and 2).

Transportation costs. Quarter to quarter, PNW-route transportation costs for shipping wheat from Kansas decreased 5 percent and, from North Dakota, decreased 6 percent. Quarter to quarter, U.S. Gulf-route transportation costs for shipping wheat from Kansas decreased 8 percent and, from North Dakota, decreased 7 percent. Year to year, PNW-route transportation costs for shipping wheat were down 5 percent from Kansas and down 7 percent from North Dakota. Year to year, U.S. Gulf-route transportation costs were down 8 percent from Kansas and down 6 percent from North Dakota.

Total landed costs. Quarter-to-quarter decreases in total landed costs for shipping wheat from Kansas were due to lower transportation costs. However, in shipping from North Dakota, such decreases were due to lower transportation costs and lower farm values. Year to year, landed costs for both States via both routes decreased because of lower transportation costs and lower farm values.

Table 1: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the Pacific Northwest

Mode	Kansas					North Dakota				
	2019	2020		Year-to-year change	Quarterly change	2019	2020		Year-to-year change	Quarterly change
	2nd qtr.	1st qtr.	2nd qtr.			2nd qtr.	1st qtr.	2nd qtr.		
		\$/metric ton		%	%		\$/metric ton		%	%
Truck	10.98	10.70	9.70	-11.66	-9.35	10.98	10.70	9.70	-11.66	-9.35
Rail ¹	62.16	62.83	62.83	1.08	0.00	57.96	57.61	57.61	-0.60	0.00
Ocean vessel	23.56	23.10	18.94	-19.61	-18.01	23.56	23.10	18.94	-19.61	-18.01
Transportation costs	96.70	96.63	91.47	-5.41	-5.34	92.50	91.41	86.25	-6.76	-5.64
Farm value ²	167.67	160.81	162.65	-2.99	1.14	175.63	173.19	169.02	-3.76	-2.41
Total landed cost	264.37	257.44	254.12	-3.88	-1.29	268.13	264.60	255.27	-4.80	-3.53
Transport % of landed cost	36.58	37.53	35.99			34.50	34.55	33.79		

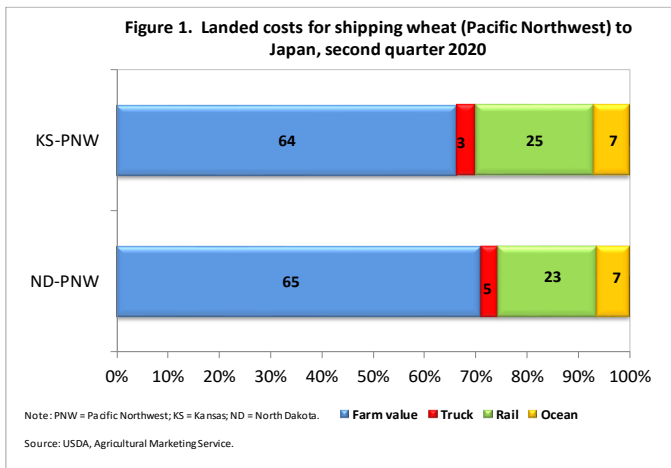
Table 2: Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the U.S. Gulf

Mode	Kansas					North Dakota				
	2019	2020		Year-to-year change	Quarterly change	2019	2020		Year-to-year change	Quarterly change
	2nd qtr.	1st qtr.	2nd qtr.			2nd qtr.	1st qtr.	2nd qtr.		
		\$/metric ton		%	%		\$/metric ton		%	%
Truck	10.98	10.70	9.70	-11.66	-9.35	10.98	10.70	9.70	-11.66	-9.35
Rail ¹	42.88	43.31	43.31	1.00	0.00	60.14	60.78	60.78	1.06	0.00
Ocean vessel	42.78	43.38	36.33	-15.08	-16.25	42.78	43.38	36.33	-15.08	-16.25
Transportation costs	96.64	97.39	89.34	-7.55	-8.27	113.90	114.86	106.81	-6.22	-7.01
Farm value ²	167.67	160.81	162.65	-2.99	1.14	175.63	173.19	169.02	-3.76	-2.41
Total landed cost	264.31	258.20	251.99	-4.66	-2.41	289.53	288.05	275.83	-4.73	-4.24
Transport % of landed cost	36.56	37.72	35.45			39.34	39.88	38.72		

¹ Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car.

² USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter). Note: PNW = Pacific Northwest; qtr. = quarter. Source: USDA, Agricultural Marketing Service.

PNW-route landed costs. In the second quarter of 2020, total landed costs for shipping wheat from each State via the PNW route ranged from \$254/metric ton (mt) to \$255/mt (table 1). Quarter to quarter, landed costs for shipping via the PNW route fell 1 percent from Kansas and fell 4 percent from North Dakota. Year to year, landed costs to ship via the PNW route decreased 4 percent from Kansas and decreased 5 percent from North Dakota. The decreases stemmed primarily from lower transportation costs and farm values. Year to year, rail's share of total landed costs for shipping wheat from Kansas and North Dakota via



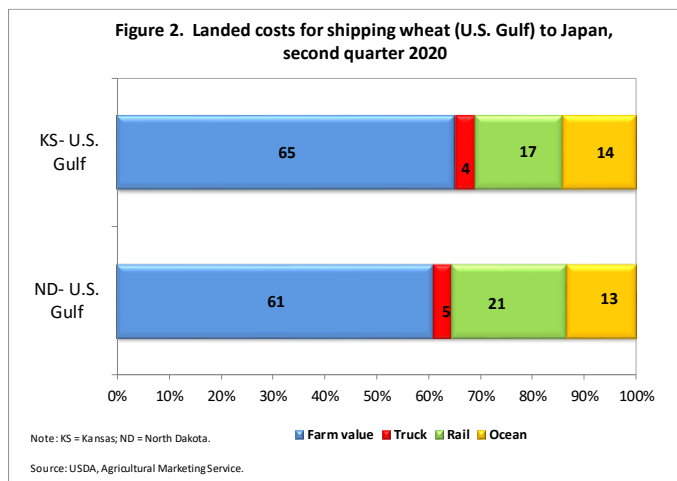
the PNW route rose slightly. Second-quarter farm values were 64 percent of the PNW-route landed costs for shipping from Kansas and 65 percent from North Dakota. These shares were equal to last year for Kansas but slightly below last year for North Dakota (fig. 1 and table 1).

PNW-route ocean rates for shipping wheat decreased 18 percent from quarter to quarter and 20 percent year to year. The decreases resulted from weaker demand for products being shipped to Europe and Asia ([July 23, 2020, Grain Transportation Report](#)). Quarter to quarter, rail rates for shipping wheat via the PNW route were

unchanged for each State. However, year to year, rail rates increased slightly for Kansas and decreased slightly for North Dakota. Trucking rates fell 9 percent from quarter to quarter and fell 12 percent year to year. The decreases were partly due to a sizeable drop in diesel prices. Second-quarter PNW-route transportation costs represented 34 to 36 percent of total landed costs, below the previous quarter and last year (table 1).

U.S. Gulf-route landed costs. Quarter to quarter, total landed costs for shipping wheat via the U.S. Gulf were down 2 percent from Kansas and down 4 percent from North Dakota. Year to year, Gulf-route landed costs fell 5 percent from Kansas and 5 percent from North Dakota (table 2). The total landed cost to ship from each State via the U.S. Gulf ranged from \$252/mt to \$276/mt. Second-quarter 2020 farm values represented 65 percent of Gulf-route landed costs from Kansas and 61 percent from North Dakota. Year to year, these shares were up for Kansas and unchanged for North Dakota (fig. 2 and table 2).

U.S. Gulf-route ocean rates decreased 16 percent from quarter to quarter and 15 percent year to year because of weaker international demand for ocean freight ([July 23, 2020, GTR](#)). U.S. Gulf-route rail rates were unchanged from quarter to quarter, but year to year, increased 1 percent for each State. Rail's share of the landed costs was up slightly quarter to quarter and year to year. Second-quarter 2020 transportation costs via the U.S. Gulf route—with Kansas as origin—were 35 percent of the total landed costs (down quarter to quarter and year to year) (see table 2). Similarly, transportation costs via the U.S. Gulf route—with North Dakota as origin—were 39 percent of the total landed costs (down quarter to quarter and unchanged year to year).



Second-quarter 2020 wheat inspections destined to Japan. According to USDA's Federal Grain Inspection Service, second-quarter 2020 wheat inspected for export to Japan totaled .680 million metric tons (mmt), down 8 percent from quarter to quarter and up 16 percent from year to year. Of total U.S. second-quarter 2020 wheat exports (6.7 mmt), the share to Japan accounted for 10 percent. Year to year, wheat exports decreased 14 percent ([July 16, 2020, GTR](#)). According to USDA's [July 2020 World Agricultural Supply and Demand Estimates](#), U.S. wheat exports for marketing year 2020/21 are expected to decrease 2 percent. Johnny.Hill@usda.gov

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge*	Ocean	
		Unit train	Shuttle		Gulf	Pacific
08/05/20	163	280	245	199	186	154
07/29/20	163	280	234	205	186	147

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);

*Due to the closure of several lock and dam facilities on Illinois River between July 1 and October 27, 2020, mid-Mississippi barge rate was substituted for Illinois rate as the benchmark for calculating cost index during the closures.

n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

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

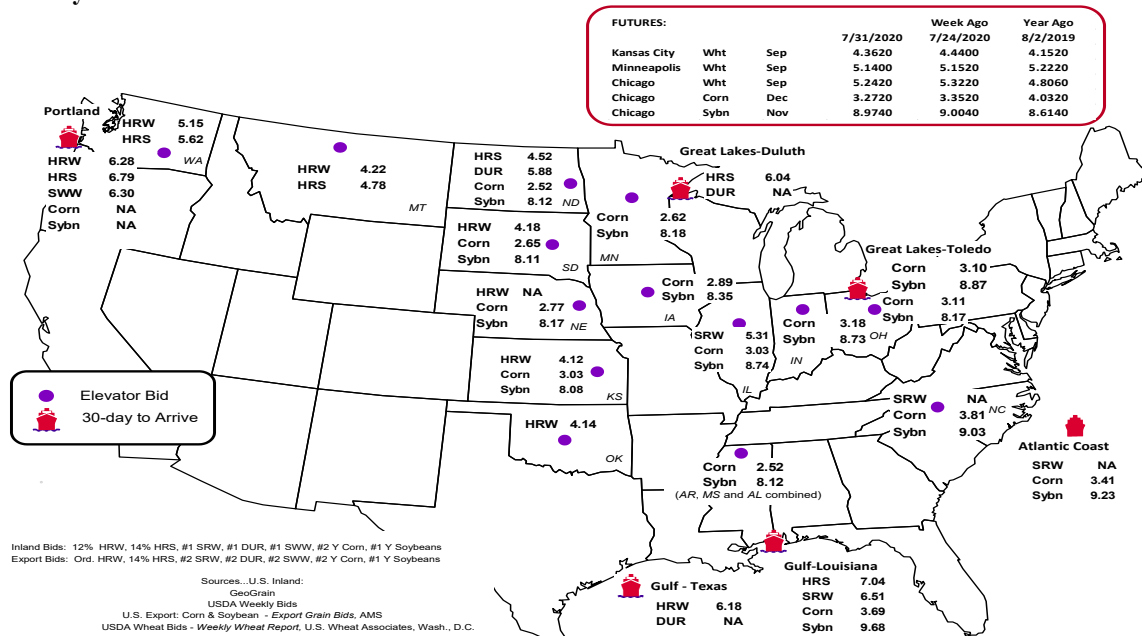
Commodity	Origin-destination	7/31/2020	7/24/2020
Corn	IL-Gulf	-0.66	-0.76
Corn	NE-Gulf	-0.92	-0.93
Soybean	IA-Gulf	-1.33	-1.23
HRW	KS-Gulf	-2.06	-2.00
HRS	ND-Portland	-2.27	-1.99

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			
7/29/2020 ^p	223	900	3,301	183	4,607	7/25/2020	2,906
7/22/2020 ^r	312	337	4,840	187	5,676	7/18/2020	3,720
2020 YTD ^r	12,517	26,588	141,363	5,985	186,453	2020 YTD	73,896
2019 YTD ^r	30,204	36,089	158,853	11,374	236,520	2019 YTD	72,001
2020 YTD as % of 2019 YTD	41	74	89	53	79	% change YTD	103
Last 4 weeks as % of 2019 ²	40	83	97	36	82	Last 4wks. % 2019	107
Last 4 weeks as % of 4-year avg. ²	85	93	78	53	80	Last 4wks. % 4 yr.	116
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.

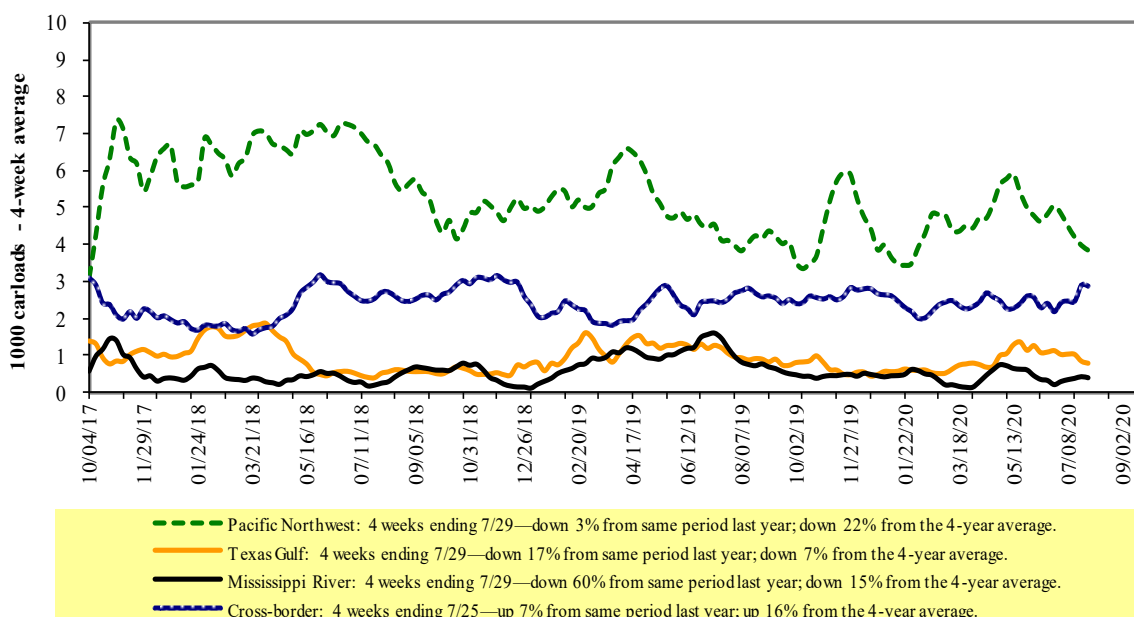
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 7/25/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,745	2,521	9,827	1,075	5,341	20,509	4,635	5,310
This week last year	1,573	2,368	11,921	1,259	5,219	22,340	4,108	4,636
2020 YTD	49,164	71,233	319,146	31,093	150,171	620,807	121,411	135,301
2019 YTD	56,486	85,534	332,789	33,834	155,429	664,072	129,506	131,025
2020 YTD as % of 2019 YTD	87	83	96	92	97	93	94	103
Last 4 weeks as % of 2019*	89	86	87	84	96	89	117	109
Last 4 weeks as % of 3-yr. avg.**	86	88	88	104	99	92	123	105
Total 2019	91,611	137,201	568,369	58,527	260,269	1,115,977	212,506	235,892

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

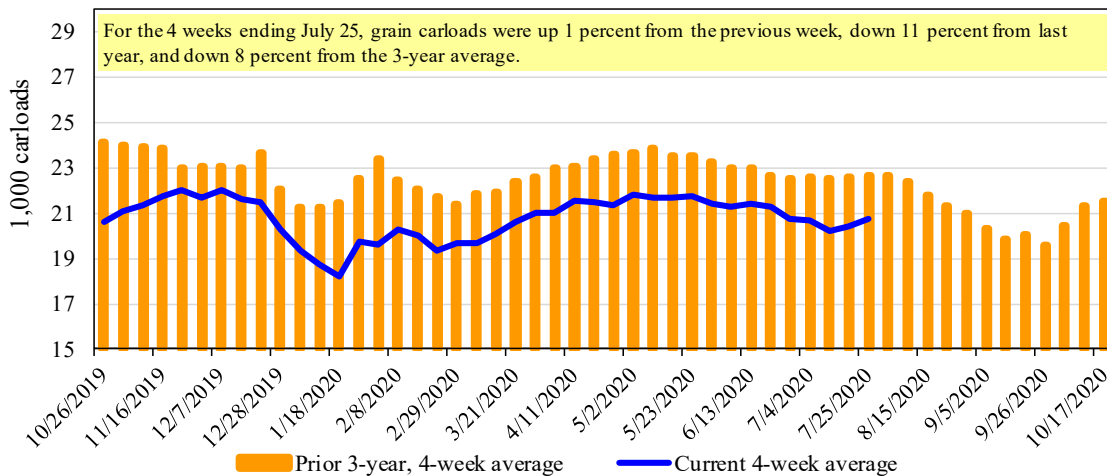
**The past 4 weeks as a percent of the same period from the prior 3-year average. YTD = year-to-date; avg. = average; yr. = year.

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: 7/30/2020		Delivery period							
		Aug-20	Aug-19	Sep-20	Sep-19	Oct-20	Oct-19	Nov-20	Nov-19
BNSF ³	COT grain units	73	0	0	no bid	0	no bid	0	no bid
	COT grain single-car	0	0	125	0	104	26	22	31
UP ⁴	GCAS/Region 1	no offer	no offer	no offer	no offer	no offer	no offer	n/a	n/a
	GCAS/Region 2	no offer	no offer	27	no bid	no offer	no offer	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.

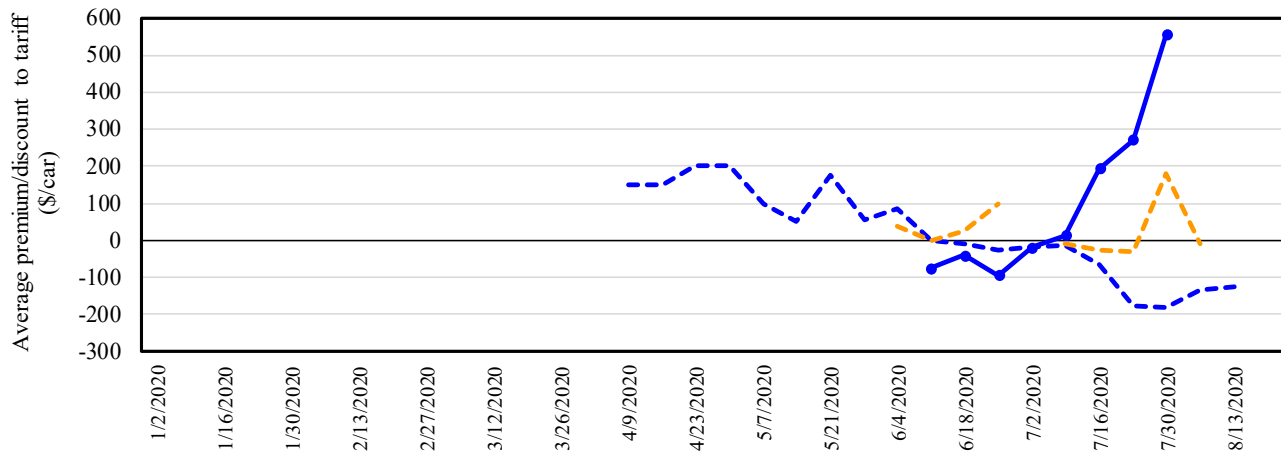
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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 August 2020, secondary market



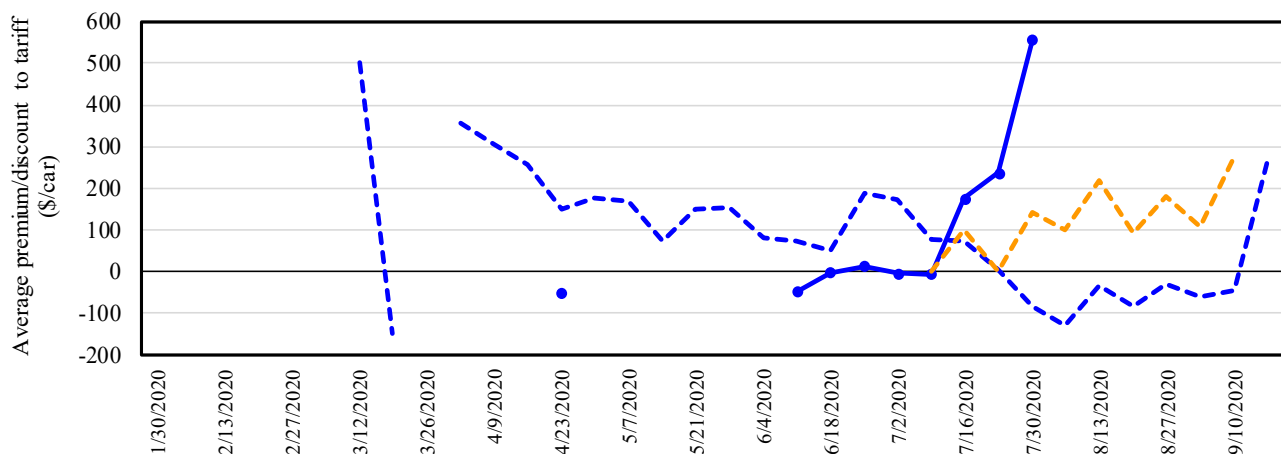
	7/30/2020	BNSF	UP
Non-shuttle	n/a	n/a	n/a
Shuttle	\$688	\$425	

—●— 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.
 Average shuttle bids/offers rose \$284 this week and are at the peak.

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 September 2020, secondary market



	7/30/2020	BNSF	UP
Non-shuttle	n/a	n/a	n/a
Shuttle	\$750	\$363	

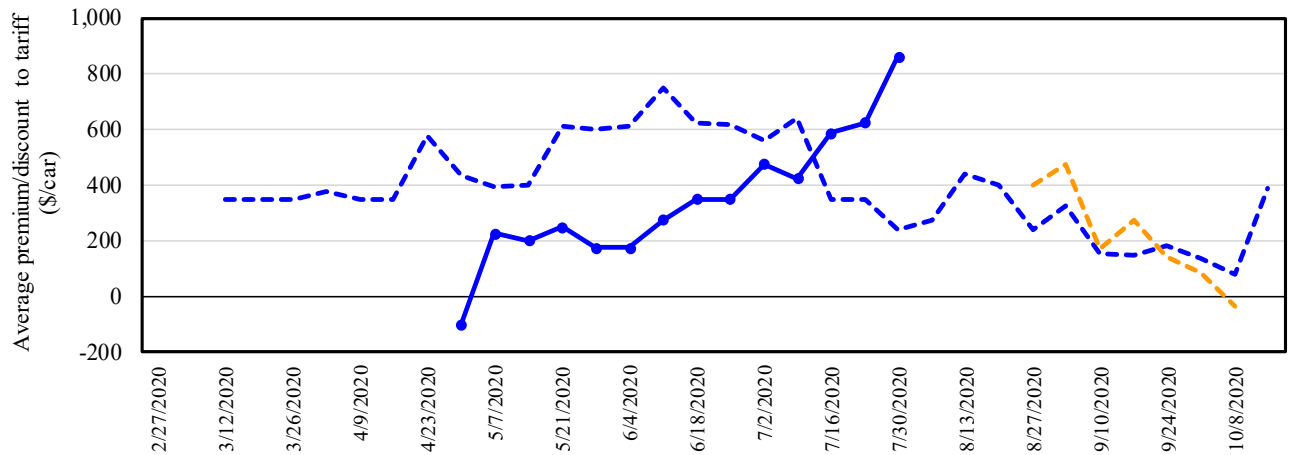
—●— Shuttle
- - - Shuttle prior 3-yr. avg. (same week)
—□— Non-shuttle
- - - Non-shuttle prior 3-yr. avg. (same week)

There were no non-shuttle bids/offers this week.
 Average shuttle bids/offers rose \$319 this week and are at the peak.

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 October 2020, secondary market



7/30/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	\$900	\$825

There were no non-shuttle bids/offers this week.
Average shuttle bids/offers rose \$238 this week and are at the peak.

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: 7/30/2020		Delivery period					
		Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21
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 last week	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	688	750	900	600	400	n/a
	Change from last week	388	400	200	200	200	n/a
	Change from same week 2019	781	875	950	n/a	n/a	n/a
	UP-Pool	425	363	825	425	100	n/a
	Change from last week	181	238	275	158	100	n/a
Change from same week 2019	739	596	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

August 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	\$35	\$39.90	\$1.09	-2
	Grand Forks, ND	Duluth-Superior, MN	\$4,208	\$0	\$41.79	\$1.14	-3
	Wichita, KS	Los Angeles, CA	\$7,115	\$0	\$70.66	\$1.92	-2
	Wichita, KS	New Orleans, LA	\$4,525	\$62	\$45.55	\$1.24	-2
	Sioux Falls, SD	Galveston-Houston, TX	\$6,851	\$0	\$68.03	\$1.85	-2
	Colby, KS	Galveston-Houston, TX	\$4,801	\$68	\$48.35	\$1.32	-3
	Amarillo, TX	Los Angeles, CA	\$5,121	\$95	\$51.80	\$1.41	-3
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$70	\$39.43	\$1.00	-1
	Toledo, OH	Raleigh, NC	\$6,816	\$0	\$67.69	\$1.72	4
	Des Moines, IA	Davenport, IA	\$2,415	\$15	\$24.13	\$0.61	13
	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	\$44	\$38.17	\$0.97	2
	Des Moines, IA	Los Angeles, CA	\$5,680	\$128	\$57.67	\$1.46	-1
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$30	\$36.35	\$0.99	-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	\$70	\$46.83	\$1.27	-1
Shuttle train							
Wheat	Great Falls, MT	Portland, OR	\$4,018	\$0	\$39.90	\$1.09	-3
	Wichita, KS	Galveston-Houston, TX	\$4,236	\$0	\$42.07	\$1.14	-3
	Chicago, IL	Albany, NY	\$7,074	\$0	\$70.25	\$1.91	20
	Grand Forks, ND	Portland, OR	\$5,676	\$0	\$56.37	\$1.53	-2
	Grand Forks, ND	Galveston-Houston, TX	\$5,996	\$0	\$59.54	\$1.62	-2
	Colby, KS	Portland, OR	\$6,012	\$112	\$60.81	\$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	\$70	\$38.63	\$0.98	-1
Lincoln, NE		Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
Des Moines, IA		Amarillo, TX	\$4,220	\$55	\$42.45	\$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	\$81	\$49.22	\$1.34	-1
	Toledo, OH	Huntsville, AL	\$4,805	\$0	\$47.72	\$1.30	4
	Grand Island, NE	Portland, OR	\$5,260	\$115	\$53.37	\$1.45	-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: August 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	\$7,384	\$0	\$75.45	\$2.05	-2
	OK	Cuautitlan, EM	\$6,713	\$49	\$69.08	\$1.88	-2
	KS	Guadalajara, JA	\$7,471	\$474	\$81.18	\$2.21	-2
	TX	Salinas Victoria, NL	\$4,329	\$28	\$44.52	\$1.21	-1
Corn	IA	Guadalajara, JA	\$8,902	\$376	\$94.80	\$2.41	-1
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	0
	NE	Queretaro, QA	\$8,278	\$92	\$85.53	\$2.17	-1
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,643	\$89	\$79.01	\$2.00	-2
	SD	Torreón, CU	\$7,690	\$0	\$78.57	\$1.99	0
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$354	\$90.94	\$2.47	-1
	NE	Guadalajara, JA	\$9,172	\$362	\$97.41	\$2.65	-1
	IA	El Castillo, JA	\$9,490	\$0	\$96.97	\$2.64	1
	KS	Torreón, CU	\$7,964	\$238	\$83.80	\$2.28	-1
Sorghum	NE	Celaya, GJ	\$7,772	\$323	\$82.71	\$2.10	-2
	KS	Queretaro, QA	\$8,108	\$61	\$83.46	\$2.12	0
	NE	Salinas Victoria, NL	\$6,713	\$49	\$69.09	\$1.75	0
	NE	Torreón, CU	\$7,092	\$210	\$74.61	\$1.89	-3

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.

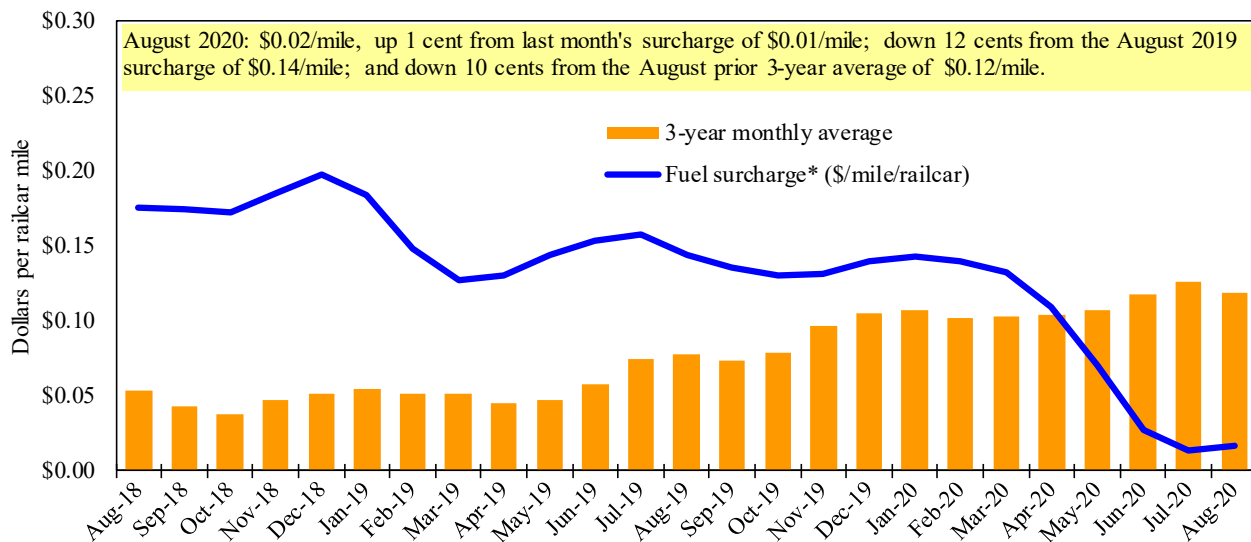
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

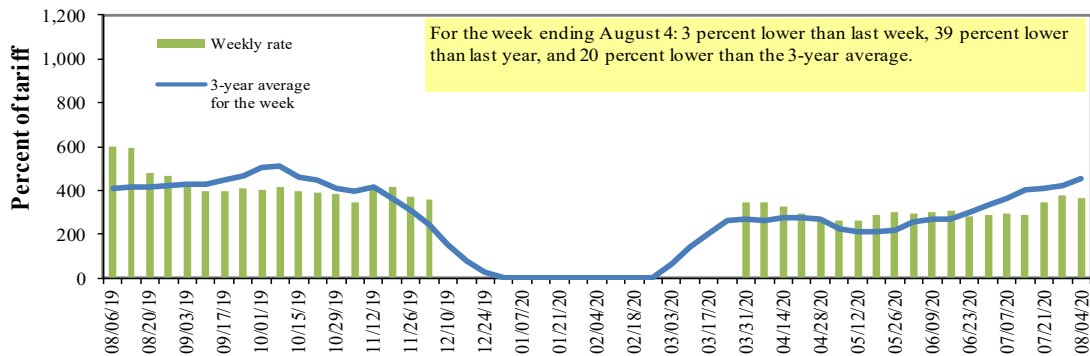
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8a

Mid-Mississippi 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	8/4/2020	454	364	-	240	320	320	229
	7/28/2020	469	375	-	259	316	316	239
\$/ton	8/4/2020	28.10	19.36	-	9.58	15.01	12.93	7.19
	7/28/2020	29.03	19.95	-	10.33	14.82	12.77	7.50
Current week % change from the same week:								
	Last year	-16	-39	-	-28	9	9	-42
	3-year avg. ²	-3	-20	-	-28	2	1	-18
Rate¹	September	475	445	-	374	435	435	374
	November	469	411	400	279	373	373	259

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

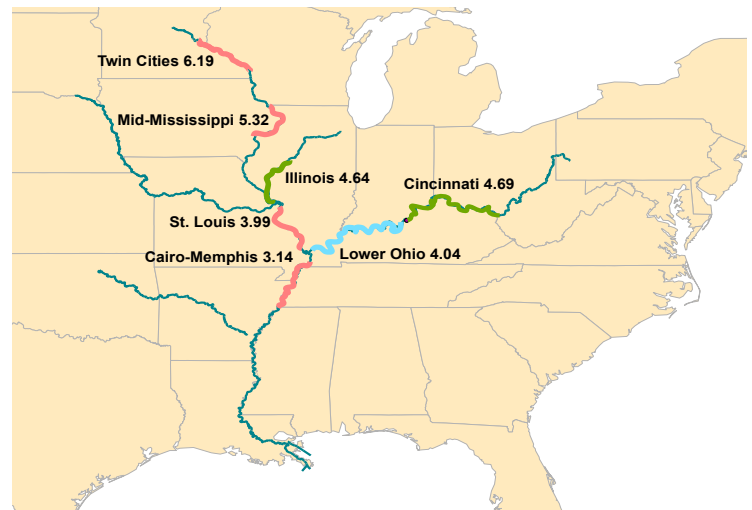
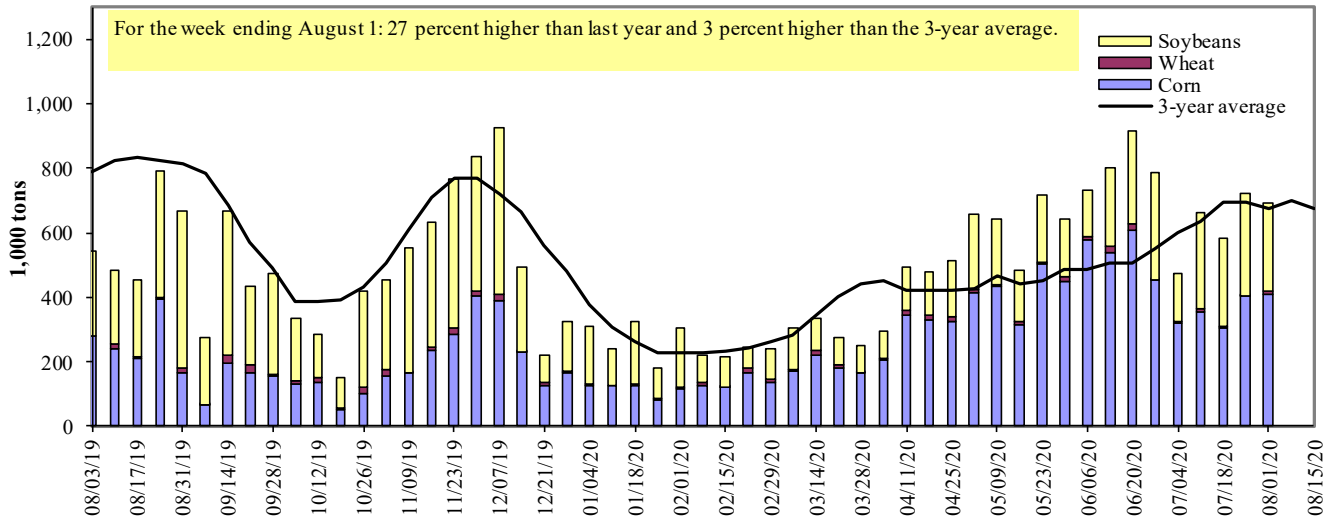


Figure 10

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 08/01/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	241	2	183	0	425
Winfield, MO (L25)	372	8	245	0	625
Alton, IL (L26)	425	8	273	0	705
Granite City, IL (L27)	409	8	277	0	694
Illinois River (La Grange)	0	0	0	0	0
Ohio River (Olmsted)	53	26	70	0	149
Arkansas River (L1)	3	28	15	0	46
Weekly total - 2020	465	62	363	0	890
Weekly total - 2019	296	25	334	22	677
2020 YTD ¹	11,478	1,179	7,643	97	20,396
2019 YTD ¹	7,649	1,090	6,354	100	15,193
2020 as % of 2019 YTD	150	108	120	97	134
Last 4 weeks as % of 2019 ²	120	220	100	25	113
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.

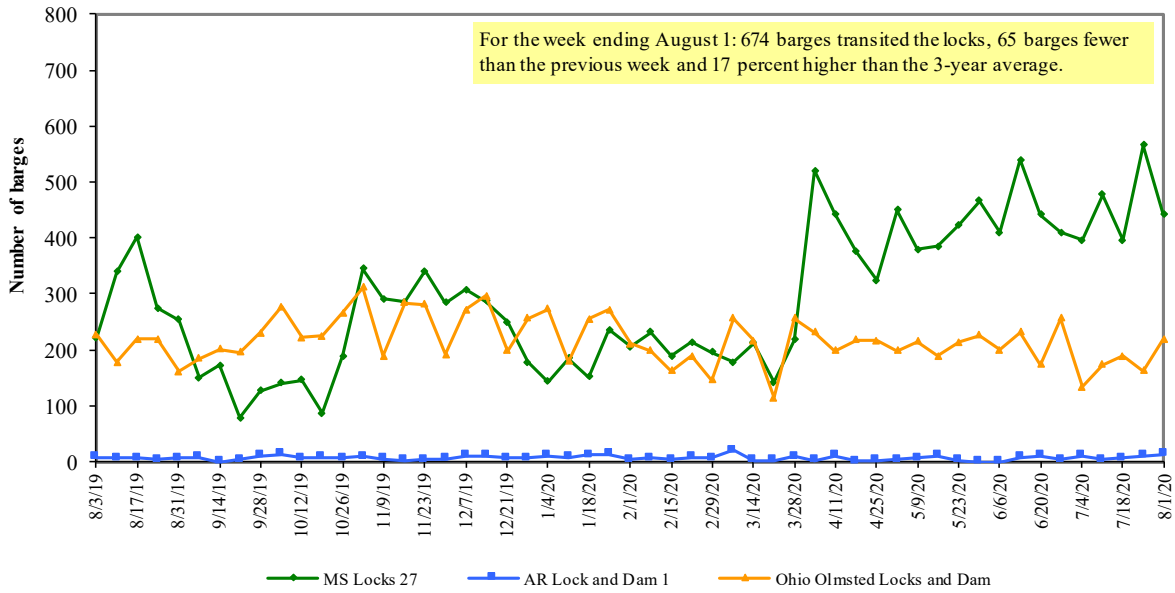
² As a percent of same period in 2019.

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

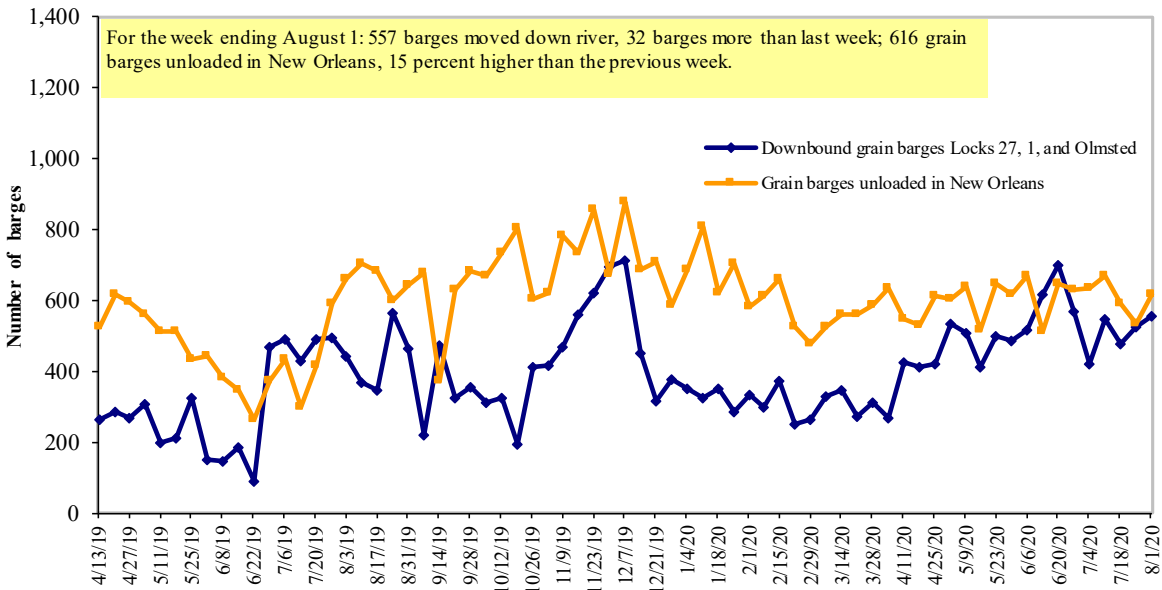
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 8/3/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.517	-0.002	-0.538
	New England	2.631	-0.001	-0.476
	Central Atlantic	2.696	-0.001	-0.537
	Lower Atlantic	2.372	-0.003	-0.551
II	Midwest	2.298	-0.003	-0.644
III	Gulf Coast	2.175	-0.008	-0.612
IV	Rocky Mountain	2.343	0.001	-0.622
	West Coast	2.955	0.001	-0.650
V	West Coast less California	2.592	0.006	-0.590
	California	3.253	-0.003	-0.687
Total	United States	2.424	-0.003	-0.608

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

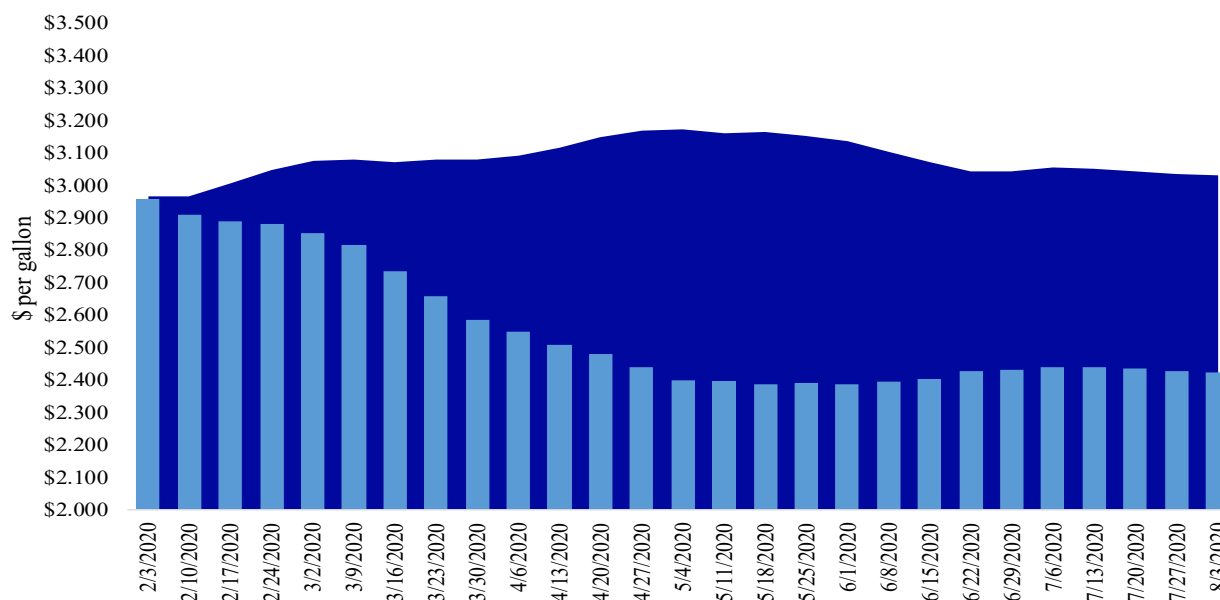
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending August 3, the U.S. average diesel fuel price decreased 0.3 cents from the previous week to \$2.424 per gallon, 60.8 cents below the same week last year.

■ Last year ■ Current year
\$3.032 \$2.424



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									
7/23/2020	1,732	660	1,808	1,280	207	5,688	5,678	7,449	18,814
This week year ago	1,532	854	1,393	999	304	5,082	3,895	7,785	16,761
Cumulative exports-marketing year²									
2019/20 YTD	1,792	267	1,047	646	178	3,930	38,003	39,330	81,263
2018/19 YTD	2,025	321	821	569	59	3,795	45,991	40,940	90,726
YTD 2019/20 as % of 2018/19	89	83	127	114	299	104	83	96	90
Last 4 wks. as % of same period 2018/19*	116	73	123	118	64	108	179	101	121
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 07/23/2020	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	2,155	14,324	15,469	(7)	14,659
Japan	821	9,815	12,670	(23)	11,955
Korea	0	2,566	3,697	(31)	4,977
Colombia	90	4,580	4,653	(2)	4,692
Peru	40	558	1,992	(72)	2,808
Top 5 importers	3,106	31,844	38,480	(17)	39,091
Total U.S. corn export sales	8,328	43,681	49,885	(12)	54,024
% of projected exports	15%	97%	95%		
Change from prior week ²	639	(29)	143		
Top 5 importers' share of U.S. corn export sales	37%	73%	77%		72%
USDA forecast July 2020	54,707	45,165	52,570	(14)	
Corn use for ethanol USDA forecast, July 2020	132,080	123,190	136,601	(10)	

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. Total commitments change (net sales) from prior week could include revisions from previous week's outstanding sales 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 14

Top 5 importers¹ of U.S. soybeans

For the week ending 7/23/2020	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	8,091	16,376	14,360	14	25,733
Mexico	735	4,729	4,932	(4)	4,271
Indonesia	20	2,213	2,355	(6)	2,386
Japan	135	2,402	2,569	(6)	2,243
Egypt	43	3,754	2,698	39	1,983
Top 5 importers	9,023	29,475	26,913	10	36,616
Total U.S. soybean export sales	13,731	46,778	48,725	(4)	53,746
% of projected exports	25%	104%	102%		
change from prior week ²	3,344	258	143		
Top 5 importers' share of U.S. soybean export sales	66%	63%	55%		68%
USDA forecast, July 2020	55,858	44,959	47,738	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 7/23/2020	commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2017-19
	2020/21 current MY	2019/20 last MY		
		- 1,000 mt -		- 1,000 mt -
Mexico	949	1,259	(25)	3,213
Philippines	1,345	1,110	21	2,888
Japan	946	830	14	2,655
Nigeria	483	622	(22)	1,433
Korea	584	411	42	1,372
Indonesia	269	312	(14)	1,195
Taiwan	462	396	17	1,175
Thailand	202	315	(36)	727
Italy	307	187	64	622
Colombia	121	328	(63)	618
Top 10 importers	5,667	5,770	(2)	15,897
Total U.S. wheat export sales	9,618	8,877	8	23,821
% of projected exports	37%	34%		
change from prior week ²	677	383		
Top 10 importers' share of U.S. wheat export sales	59%	65%		67%
USDA forecast, July 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 07/30/20	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.	
Pacific Northwest									
Wheat	402	269	150	9,371	7,856	119	186	138	13,961
Corn	246	216	114	6,426	6,858	94	262	92	7,047
Soybeans	0	0	n/a	2,759	6,014	46	1	2	11,969
Total	648	485	134	18,556	20,728	90	106	88	32,977
Mississippi Gulf									
Wheat	65	141	46	2,330	3,009	77	144	117	4,448
Corn	274	424	65	17,463	14,228	123	145	89	20,763
Soybeans	416	374	111	12,488	14,125	88	89	94	31,398
Total	756	940	80	32,281	31,362	103	115	93	56,609
Texas Gulf									
Wheat	10	65	15	2,651	4,499	59	81	101	6,009
Corn	0	30	0	458	427	107	89	68	640
Soybeans	0	0	n/a	7	2	413	0	0	2
Total	10	96	10	3,116	4,928	63	82	98	6,650
Interior									
Wheat	42	50	85	1,334	1,085	123	87	98	1,987
Corn	184	156	118	5,010	4,561	110	102	101	7,857
Soybeans	107	152	70	3,730	4,036	92	69	78	7,043
Total	332	357	93	10,074	9,682	104	87	92	16,887
Great Lakes									
Wheat	4	46	9	392	508	77	229	109	1,339
Corn	0	0	n/a	0	0	n/a	n/a	0	11
Soybeans	52	0	n/a	112	363	31	42	66	493
Total	56	46	121	505	871	58	80	71	1,844
Atlantic									
Wheat	2	1	n/a	9	32	29	n/a	321	37
Corn	0	0	n/a	8	92	9	n/a	n/a	99
Soybeans	5	5	114	432	847	51	14	19	1,353
Total	7	6	134	449	971	46	17	22	1,489
U.S. total from ports*									
Wheat	526	573	92	16,087	16,988	95	136	121	27,781
Corn	704	826	85	29,366	26,165	112	150	91	36,417
Soybeans	580	531	109	19,528	25,388	77	57	71	52,258
Total	1,810	1,930	94	64,982	68,541	95	103	91	116,457

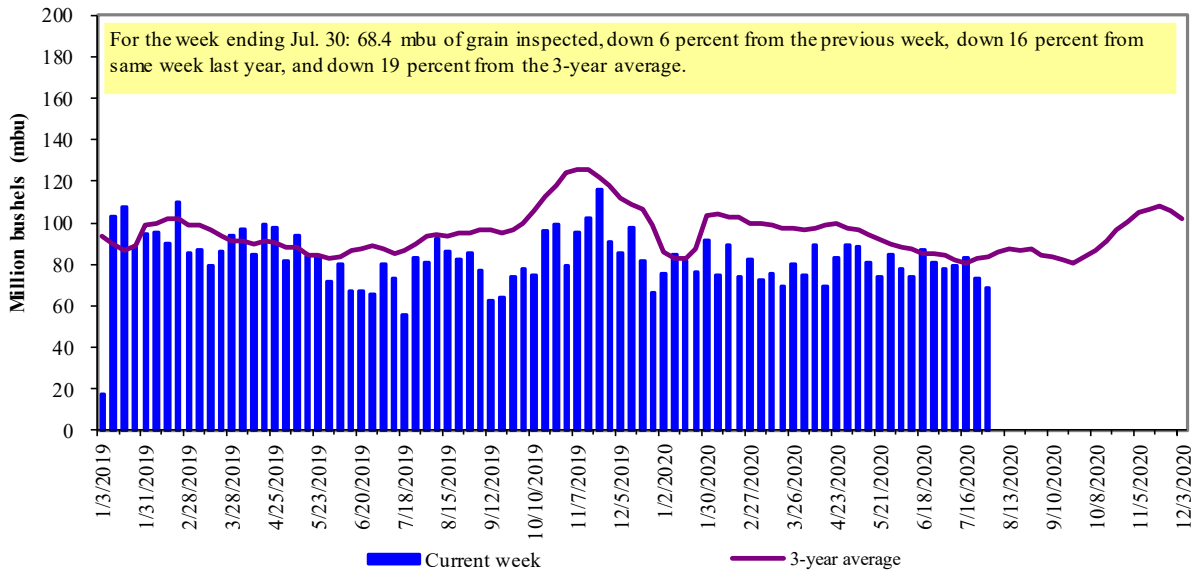
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

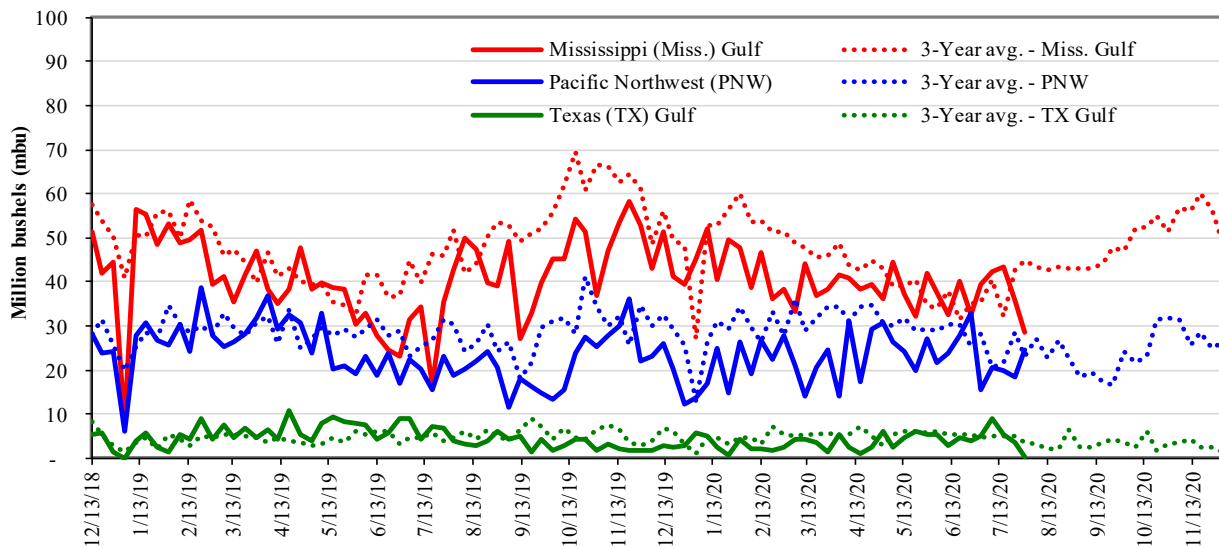


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 07/30/20 inspections (mbu):		Percent change from:			
MS Gulf:	28.5	Last wk:	down 20	TX Gulf	down 90
PNW:	24.5	Last Year (same wk):	down 33	U.S. Gulf	down 26
TX Gulf:	0.4	3-yr avg.(4-wk. mov. Avg):	down 29	PNW	up 33
					up 29
					up 4

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

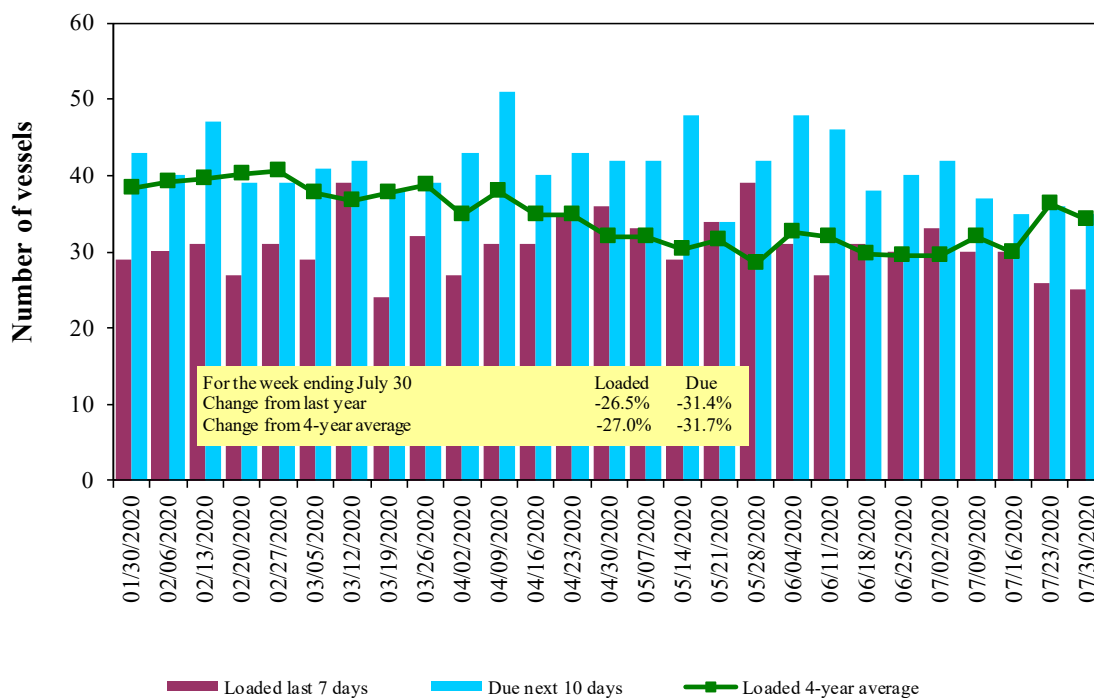
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
7/30/2020	33	25	35	9
7/23/2020	22	26	36	15
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

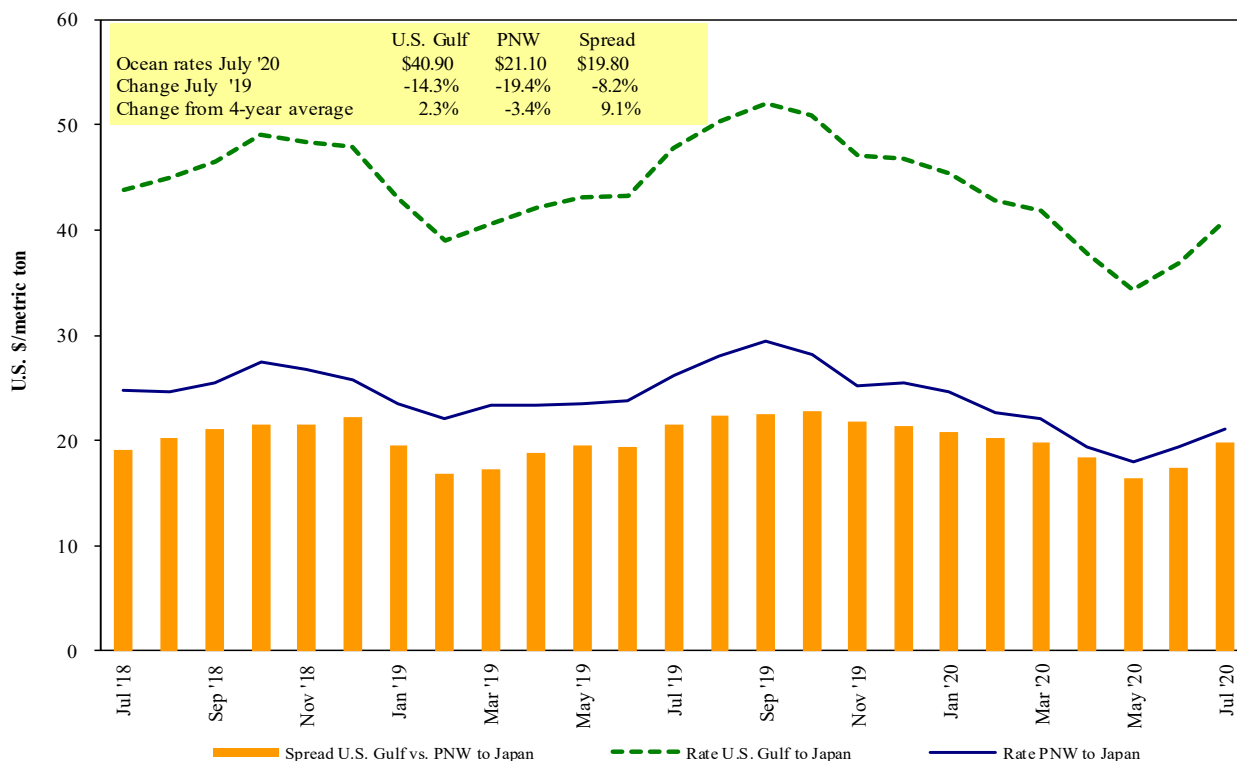
U.S. Gulf¹ vessel loading activity



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 08/01/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Aug 18/24	66,000	39.50
U.S. Gulf	Mozambique	Sorghum	Aug 10/20	30,780	41.35
U.S. Gulf	Mombasa	Wheat	Jul 23/Aug 3	1,200	117.97*
U.S. Gulf	Pt Sudan	Sorghum	Jun 5/15	33,370	99.50
PNW	China	Soybeans	Sep 1/30	63,000	22.10 op 22.60
PNW	Yemen	Wheat	Aug 4/14	15,000	42.95*
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	Jul 1/10	40,000	46.94*
Vancouver	Japan	Wheat	Sep 15/30	20,000	24.30
Vancouver	Japan	Canola	Sep 15/30	30,000	24.30
Brazil	Pakistan	Heavy grain	Jul 20/30	70,000	21.85
Brazil	China	Heavy grain	Jun 25/30	65,000	23.50
Brazil	Japan	Corn	Sep 11/20	49,000	34.75
Brazil	Japan	Corn	Sep 1/10	60,000	34.00
Brazil	SE Asia	Corn	Jul 1/6	66,000	22.75
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.

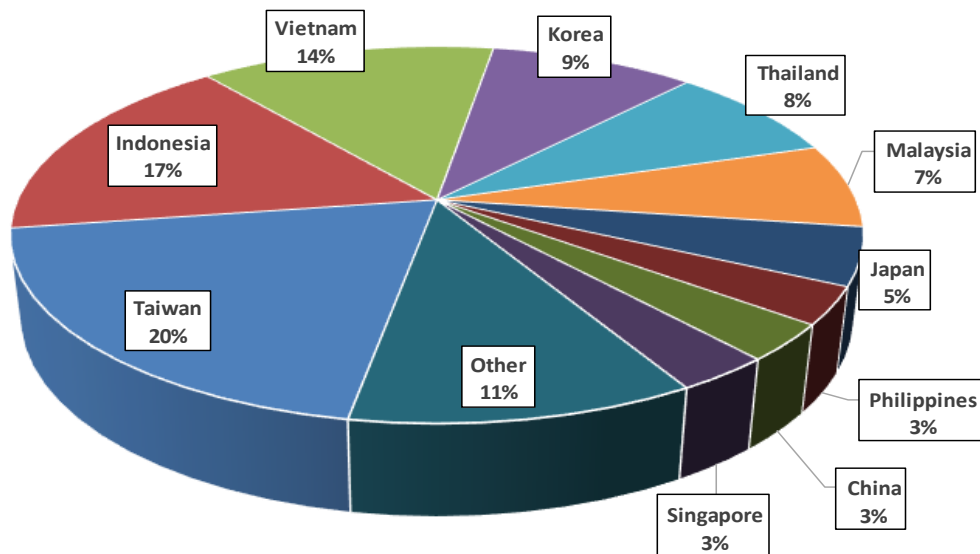
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

op = option.

Source: Maritime Research, Inc.

In 2019, containers were used to transport 9 percent of total U.S. waterborne grain exports. Approximately 60 percent of U.S. waterborne grain exports in 2019 went to Asia, of which 14 percent were moved in containers. Approximately 94 percent of U.S. waterborne containerized grain exports were destined for Asia.

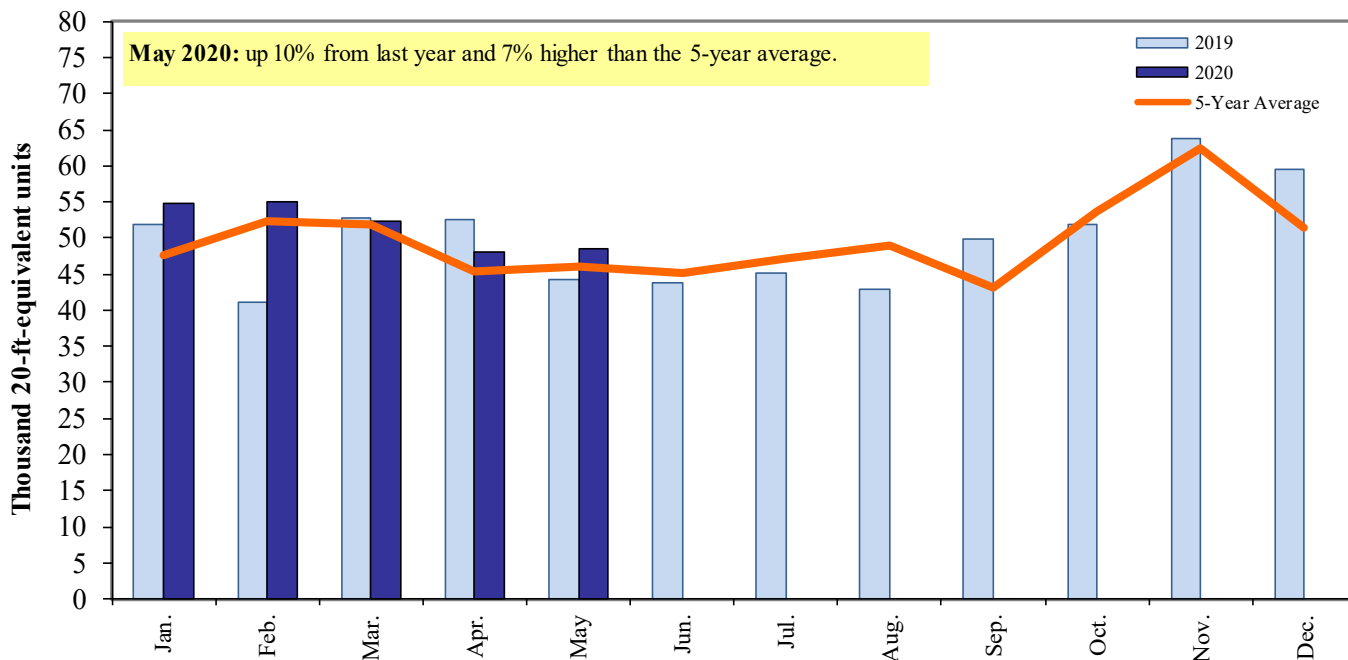
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020



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, 120810, and 120190.

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

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

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