



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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WEEKLY HIGHLIGHTS

September 17, 2020

[ATRI Launches 2020 Top Industry Issues Survey](#)

In its [2020 Top Industry Issues Survey](#) (open until October 16), the American Transportation Research Institute (ATRI) asks trucking industry stakeholders to rank the top issues of concern for the industry, along with potential strategies for addressing each issue. In addition to ranking overall issues, the survey provides details on where critical topics are ranked differently by motor carriers and professional drivers, and allows stakeholders to monitor issues over time to better understand which issues are rising, or falling priorities.

[CARB Approves Update to “At Berth” Regulation](#)

On August 27, the California Air Resources Board (CARB) [approved updates](#) to its 2007 “At Berth” regulation, further reducing pollution from oceangoing vessels while they are docked at California’s busiest ports. The revised regulation requires *every* vessel (rather than only select categories) docked in a regulated California port to use either shore power—i.e., the local electrical grid—or a CARB-approved control technology to reduce harmful emissions. The updated regulation adds auto carriers and tankers, which may be used for ethanol, to existing, already covered categories (i.e., container, reefer, and cruise vessels). Auto carriers and tankers docking at the Port of Los Angeles and the Port of Long Beach will need to comply starting in 2025, and tankers in Northern California have until 2027.

[Lawsuit filed Alleging Overcharges and Restrictions for Chassis at Ports and Inland Terminals](#)

The American Trucking Associations’ Intermodal Motor Carriers Conference (IMCC) [recently filed a lawsuit](#) against the Ocean Carrier Equipment Management Association (OECMA) and 10 international ocean carriers. The suit alleges the defendants illegally colluded to manipulate the intermodal chassis market at dozens of ports across the country. Filed with the Federal Maritime Commission (FMC), the lawsuit seeks up to \$1.8 billion in damages. In the complaint, IMCC alleges OECMA denies choice by trucking companies in leasing chassis. The complaint further contends OECMA forces trucking companies to pay unjust and unreasonable prices. The lawsuit comes after months of unsuccessful negotiation between the two parties. The lawsuit can be viewed [here](#). FMC [stated](#) it will make a final decision on the case by March 10, 2022.

[Grain Inspections Down but Above 4-Week and 3-year Averages](#)

For the week ending September 10, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 2.83 million metric tons (mmt). Total grain inspections were down 8 percent from the previous week, up 71 percent from last year, and up 27 percent from the 3-year average. Inspections were down 9 percent from the previous week for wheat; down 12 percent for soybeans; and down 1 percent for corn. Mississippi Gulf grain inspections decreased 12 percent from the previous week, and Pacific Northwest (PNW) grain inspections decreased 11 percent. During the last four weeks however, inspections were 28 percent above last year and 18 percent above the 3-year average as shipments destined to Asia and Latin America remained strong.

Snapshots by Sector

Export Sales

For the week ending September 3, **unshipped balances** of wheat, corn, and soybeans totaled 53.6 million metric tons (mmt). This represented a significant increase in outstanding sales from the same time last year. Net **corn export sales** for the new marketing year which began September 1, were 1.8 mmt. Net **soybean export sales** for the new marketing year which began September 1 were 3.2 mmt. Net weekly **wheat export sales** were 0.484 mmt, down 17 percent from the previous week.

Rail

U.S. Class I railroads originated 23,003 **grain carloads** during the week ending September 5. This was a 6-percent increase from the previous week, 32 percent more than last year, and 24 percent more than the 3-year average.

Average September shuttle **secondary railcar** bids/offers (per car) were \$800 above tariff for the week ending September 10. This was \$244 more than last week and \$994 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending September 12, **barge grain movements** totaled 803,640 tons. This was 1 percent more than the previous week and 9 percent more than the same period last year.

For the week ending September 12, 514 grain barges **moved down river**—4 more barges than the previous week. There were 912 grain barges **unloaded in New Orleans**, 11 percent more than the previous week.

Ocean

For the week ending September 10, 43 **oceangoing grain vessels** were loaded in the Gulf—43 percent more than the same period last year. Within the next 10 days (starting September 11), 65 vessels were expected to be loaded—63 percent more than the same period last year.

As of September 10, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$44.00. This was 2 percent less than the previous week. The rate from the Pacific Northwest (PNW) to Japan was \$24.00 per mt, 3 percent less than the previous week.

Fuel

For the week ending September 14, the U.S. average **diesel fuel price** decreased 1.3 cents from the previous week to \$2.422 per gallon, 56.5 cents below the same week last year.

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release is
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Grain Transportation Update

Most movement and price indicators—across all modes—have been mixed so far in 2020, compared to the same period in 2019 and historical averages. Prices are relatively low for truck, barge, and ocean movements, but have increased for rail. Grain movements, while generally low this year, have picked up in recent weeks. As of September 5, grain carloads were slightly down from a year ago but have trended up lately. The year-to-date (YTD) barge tonnage is higher than the same time in 2019, but lower than the 3-year average. According to the September [World Agricultural Supply and Demand Estimates \(WASDE\) report](#) released last week, total exports of the three major grains (corn, wheat and soybeans) are expected to reach 5.4 billion bushels in 2020/21. This amounts to a 23-percent increase from 2019/20, which in turn, could boost the demand for export grain movements.

Increased Rail Carloads of Grain in Recent Weeks

According to data from the Association of American Railroads, as of September 5, total rail traffic is down 11 percent so far this year compared to last year. YTD carloads of grain originated by U.S. Class I railroads, while down 4 percent, have trended upward since early July ([GTR fig. 3](#)). This week, 23,003 carloads of grain were originated, which is the highest seen so far this year. Increased freight movements have been associated with well above average rates in the secondary auction market ([GTR fig. 4](#)) and generally slower [grain train speeds](#). For more on recent trends facing railroads and grain, see last week's [feature article](#), "Grain Rail Supply and Demand in Advance of the 2020 Harvest."

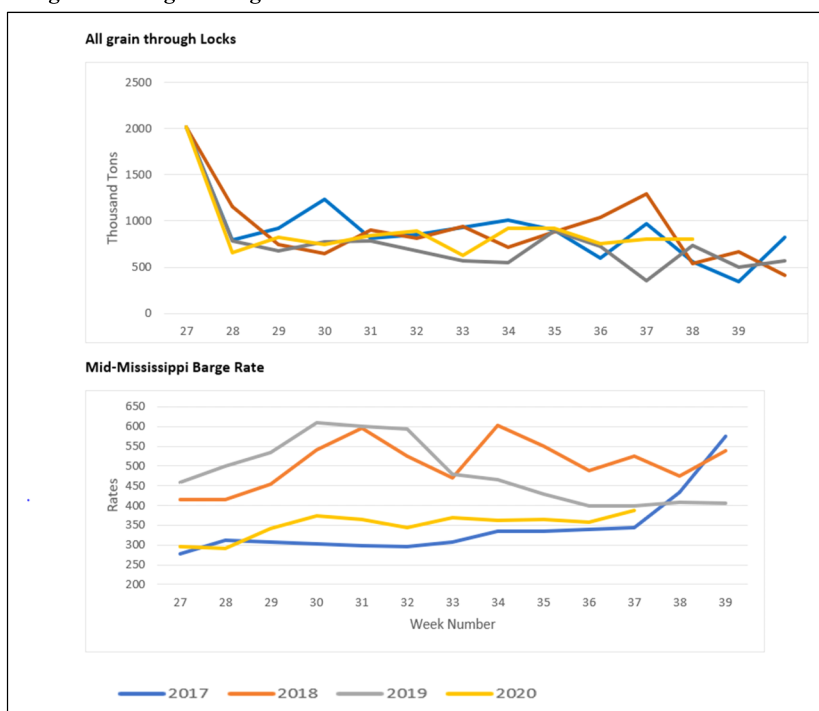
Despite Navigation Issues, Barge Movements Show Similar Seasonable Pattern

In recent months, the inland waterways have faced various navigation challenges. In early July, the U.S. Army Corps of Engineers Rock Island District started repairs to the locks and dams along the Illinois Waterway. Five locks and dams (between Dresden Island Lock and Dam and LaGrange Lock and Dam) are scheduled to [remain closed](#) until the end of October. Portions of the Mid-Mississippi River (and below) experienced some water and dredging issues in the early weeks of this quarter. In late August, the lower Mississippi and Gulf areas experienced severe weather conditions, such as Hurricane Laura and heavy rain, that caused temporary halts in barge operation.

Despite these shocks to the navigation system, barge movements of grain for most of the third quarter followed a similar pattern as previous years. Starting from the second week of July, barge movements of grains slowed down and stayed relatively stable as the previous years ([fig. 1](#)). Volatility in barge movements has been milder this year—weekly fluctuations in tonnages average 130 thousand tons, compared to 250 thousand tons in 2017 and 2018. For the week ending September 12, YTD barge grain shipments are 33 percent higher than the same time in 2019, but 5 percent lower than the average of the previous four years ([GTR Table 10](#)).

While the closure of northern Illinois River for repairs from the end of June affected shippers' ability to use that portion of the river, third quarter movements do not show noticeable differences from what is typically seen during a slow traffic period for the Illinois River. This is a sign that shippers may have employed other options, such as continued storage, trucking to the Mississippi River below the closed locks, or shipping by rail.

Figure 1: Barge tonnage and rates in recent weeks



Source: USDA, Agricultural Marketing Service,

Barge rates in this quarter are noticeably down from the previous two years and about 20 percent below the 4-year average.¹ However, rates are still higher than 2017 during most of the quarter. In 2017, a high supply of barges and generally fluid logistics allowed rates to remain low, even with some highwater challenges. A combination of adequate supply of barges and towboats, low bids due to the unstable weather condition, and market uncertainty, may explain the relatively low barge rates in this quarter.

Dry-Bulk Freight Rates Remained Relatively Low

Ocean freight rates for shipping bulk grain have decreased the last two weeks. The rates are still relatively low, compared to the beginning of the year and the same period in 2019 (year to year), but slightly above the 4-year average. During the week ending September 10, 2020, the cost of shipping bulk grain from the U.S. Gulf to Japan was \$44.00 per metric ton (mt), down 4 percent from January 2, 2020, down 15 percent from year to year, and up 2 percent from the 4-year average. As of September 10, 2020, the cost of shipping from the Pacific Northwest (PNW) was \$24.00 per mt, down 4 percent from January 2, 2020, down 19 percent year to year, and up 1 percent from the 4-year average. Ocean freight rates have fluctuated since the beginning of the year, as cargo demand attempts to catch up with vessel supply. According to September 10 *Transportation and Export Report* by O’Neil Commodity Consulting, “China demand for grain has been the only bright spot for vessel owners but has not been enough to keep rates up.” The average number of oceangoing grain vessels expected to load within the next 10 days in the U.S. Gulf has increased since the past 3 weeks. Over the last three weeks (August 27 to September 10), an average of 62 oceangoing grain vessels were expected to load within the next 10 days, compared to 39 vessels during the prior 10 weeks.

Average Diesel Fuel Prices Increase Slightly Throughout Summer Months

Since late May, average U.S. on-highway diesel fuel prices have increased by just under 4 cents per gallon to \$2.435. Prices remain more than 50 cents below the same time last year and 21 cents below the 2020 peak, which occurred in the first week of January. According to the Department of Energy’s Energy Information Administration (EIA), U.S. crude oil stocks reached peak levels in July, keeping downward pressure on diesel fuel prices. [EIA expects](#) the shift from building crude oil inventory to drawing on inventory to continue through the end of the year. High inventory levels and surplus crude oil production capacity will limit upward pressure on oil prices.

Outlook for 2020/21

According to the September *WASDE*, total exports of the three major grains are expected to reach 5.4 billion bushels in 2020/21, up 23 percent from 2019/20 (see table). 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 well, mainly due to increased exports to China. Projected soybean exports now account for 48 percent of total use. In 2020/21, U.S. corn exports are projected to increase 32 percent from 2019/20 due to reduced production in the European Union and Ukraine. Demand for U.S. wheat has increased also due in part to lower production in Europe and increased demand from China. Soybean exports for 2020/21 are expected to increase by 26 percent from 2019/20, and wheat exports are expected to increase by 1 percent. (see table). YTD export sales commitments of corn for 2020/21 are significantly above the same time last year because of increased exports to China and Japan. YTD soybean export commitments for 2020/21 are also significantly up from last year due to increased sales to China. Total wheat commitments for 2020/21 are up 8 percent from 2019/20 ([GTR, Tables 13-15](#)).

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Table 1. Major grains: production and use, September 2020, million bushels					
	Corn	Soybeans	Wheat	Total	YY
United States 2020/21 (Projected)					
Production	14,900	4,313	1,838	21,051	10.3%
Exports	2,325	2,125	975	5,425	23.0%
Domestic use	12,350	2,318	1,111	15,779	3.9%
Ending stocks	2,503	460	925		
Total use	14,675	4,442	2,086		
Stocks/use	17.1%	10.4%	44.3%		
United States 2019/20 (Estimated)					
Production	13,617	3,552	1,920	19,089	-7.6%
Exports	1,765	1,680	965	4,410	-7.3%
Domestic use	11,865	2,222	1,096	15,183	-2.3%
Ending stocks	2,253	575	1,044		
Total use	13,630	3,903	2,061		
Stocks/use	16.5%	14.7%	50.7%		
2018/19					
Production	14,340	4,428	1,885	20,653	
Exports	2,066	1,752	937	4,755	
Domestic use	12,222	2,219	1,102	15,543	
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, September 2020

¹ Due to the closure of Illinois River, Mid-Mississippi quarterly barge rates are used for analysis in this article.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge*	Ocean	
		Unit train	Shuttle		Gulf	Pacific
09/16/20	163	280	255	212	197	170
09/09/20	163	280	245	196	201	176

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)

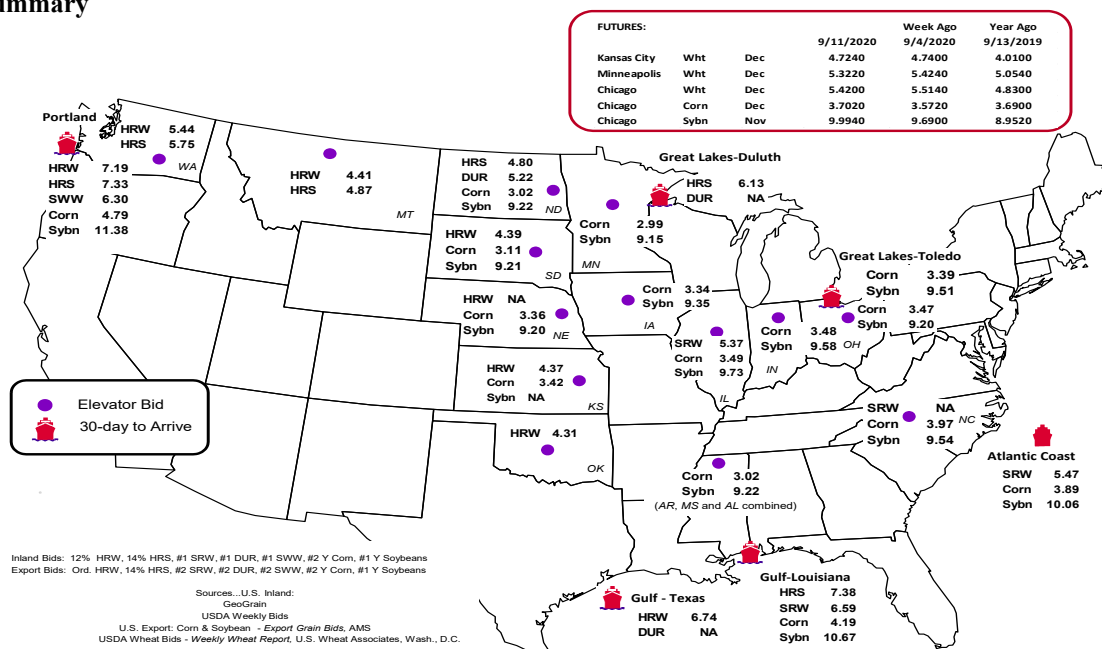
Commodity	Origin-destination	9/11/2020	9/4/2020
Corn	IL-Gulf	-0.70	-0.68
Corn	NE-Gulf	-0.83	-0.86
Soybean	IA-Gulf	-1.32	-1.32
HRW	KS-Gulf	-2.37	-2.32
HRS	ND-Portland	-2.53	-2.62

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			
9/09/2020 ^p	1,169	1,311	5,885	304	8,669	9/5/2020	1,571
9/02/2020 ^r	1,257	1,015	5,053	184	7,509	8/29/2020	2,513
2020 YTD ^r	17,640	33,273	173,082	7,178	231,173	2020 YTD	88,493
2019 YTD ^r	34,240	41,458	183,963	13,248	272,909	2019 YTD	87,658
2020 YTD as % of 2019 YTD	52	80	94	54	85	% change YTD	101
Last 4 weeks as % of 2019 ²	146	130	127	69	127	Last 4wks. % 2019	91
Last 4 weeks as % of 4-year avg. ²	128	105	108	75	108	Last 4wks. % 4 yr.	101
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.

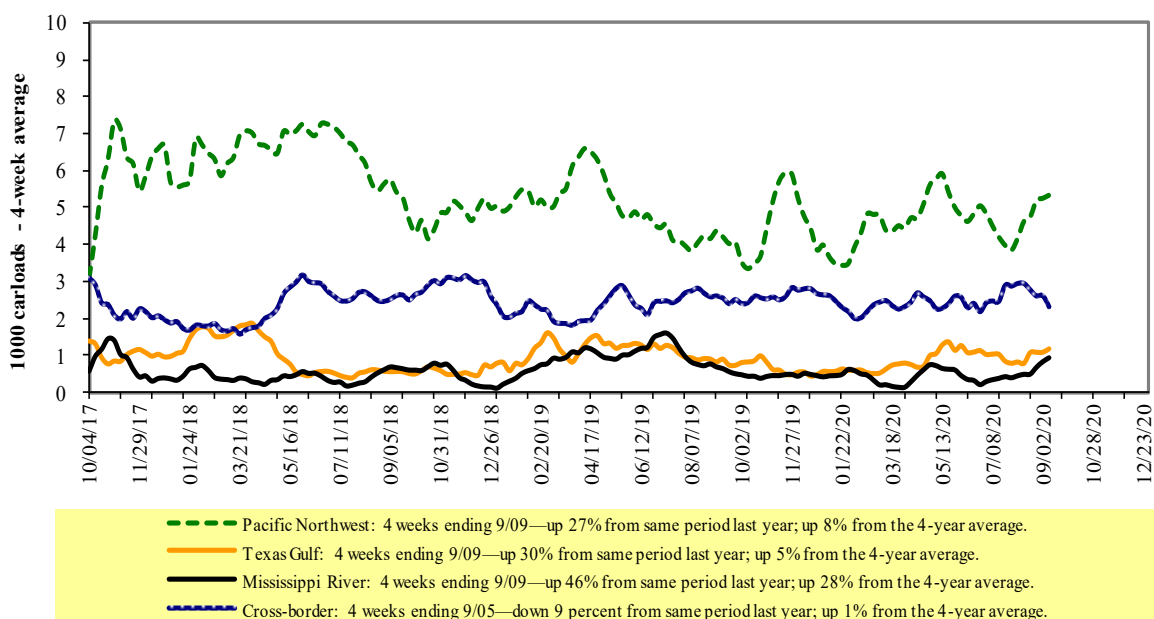
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 9/5/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,589	2,330	11,878	1,124	6,082	23,003	4,470	5,048
This week last year	1,369	1,903	8,931	1,148	4,022	17,373	2,681	3,881
2020 YTD	58,913	86,564	386,816	37,548	184,030	753,871	148,048	164,741
2019 YTD	65,466	100,606	397,705	40,442	183,999	788,218	147,237	158,086
2020 YTD as % of 2019 YTD	90	86	97	93	100	96	101	104
Last 4 weeks as % of 2019*	118	110	106	103	127	112	145	112
Last 4 weeks as % of 3-yr. avg.**	119	103	107	130	117	111	118	105
Total 2019	91,611	136,798	568,369	58,527	260,269	1,115,574	212,499	235,892

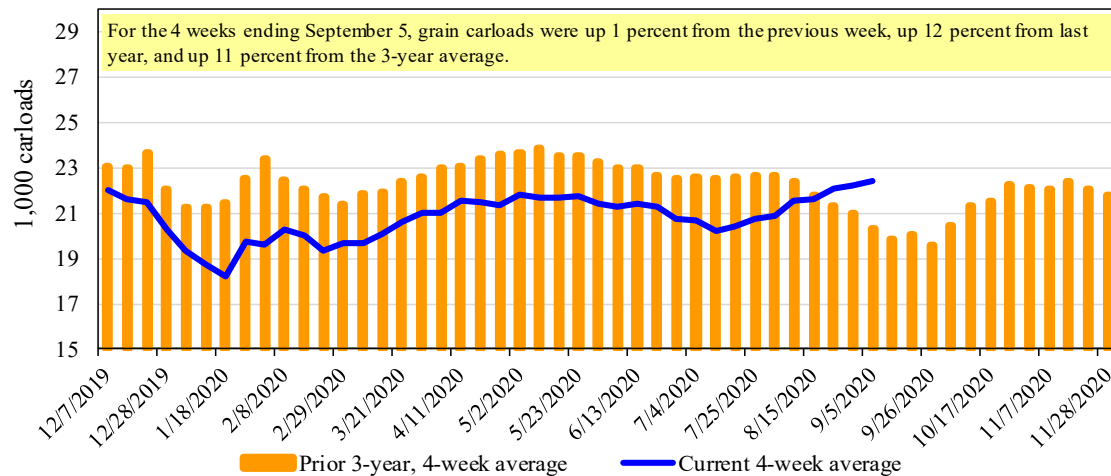
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 9/10/2020		Delivery period							
		Sep-20	Sep-19	Oct-20	Oct-19	Nov-20	Nov-19	Dec-20	Dec-19
BNSF ³	COT grain units	no offer	no offer	no offer	0	138	0	23	no bid
	COT grain single-car	no offer	no offer	no offer	0	378	0	252	3
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	no offer	no bid	no offer	no bid	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.

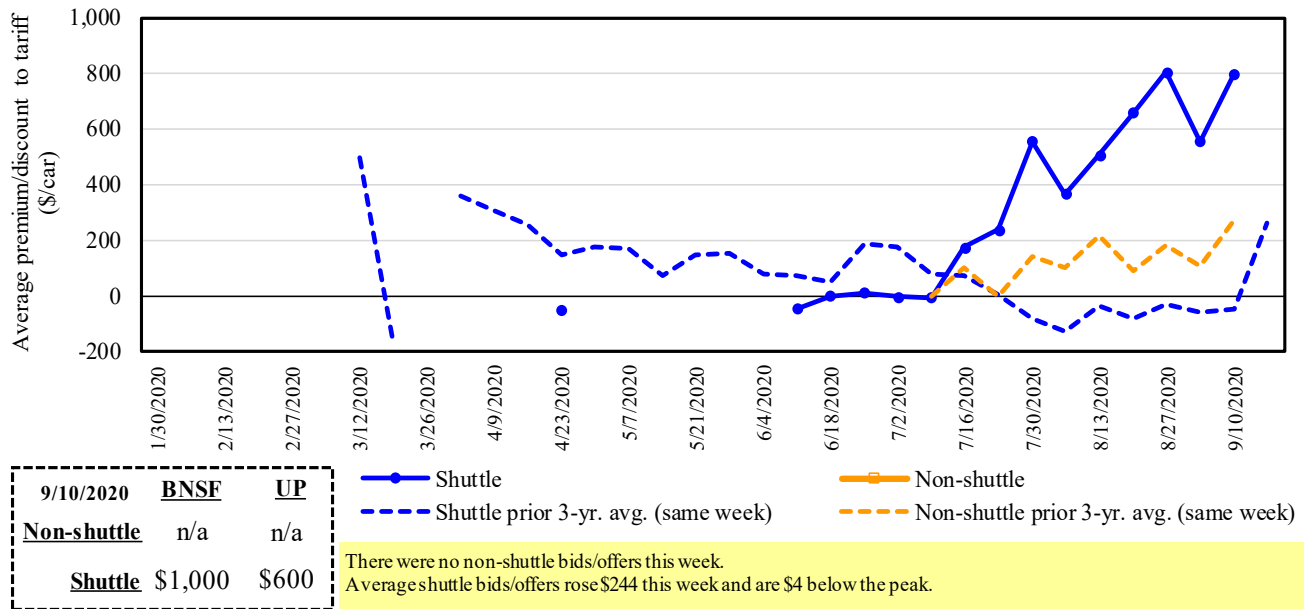
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

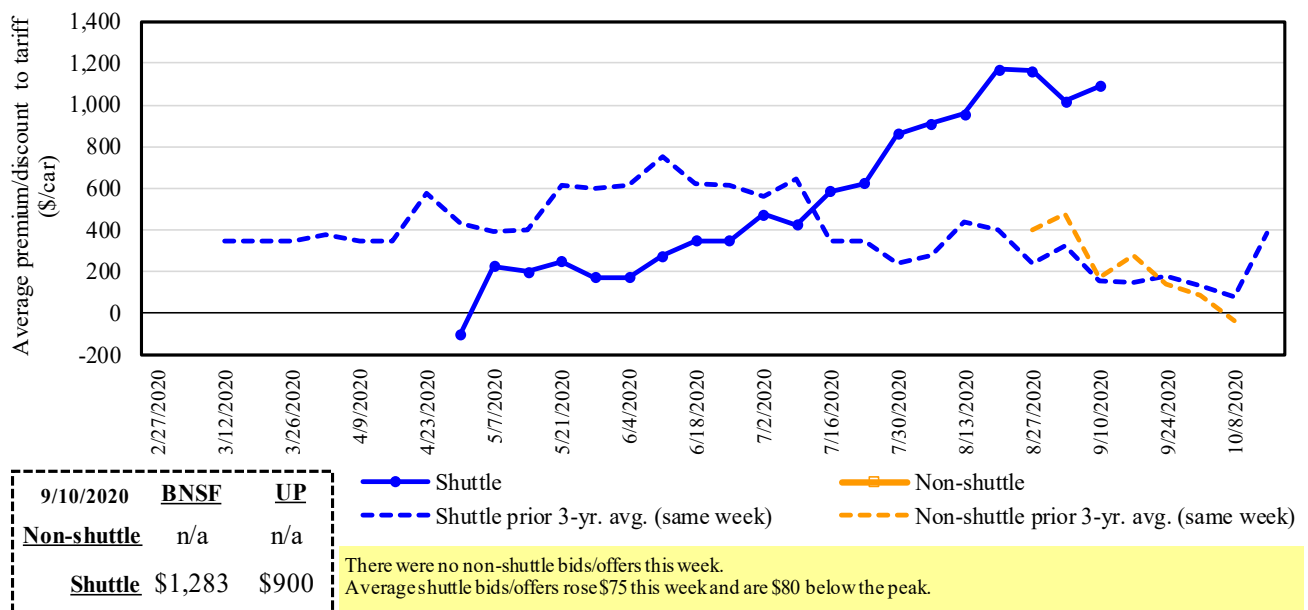
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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

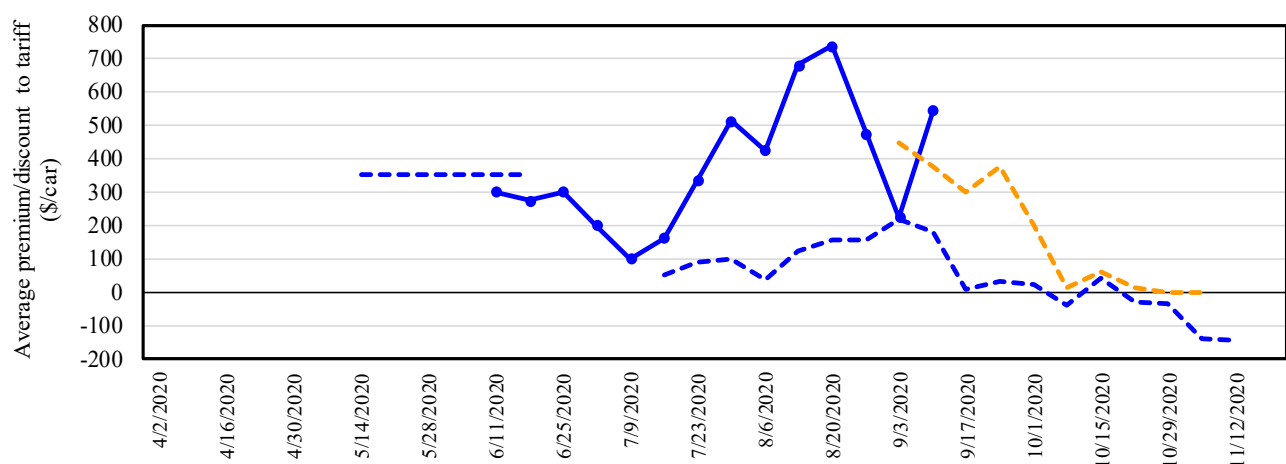
Figure 5
Bids/offers for railcars to be delivered in October 2020, secondary market



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 November 2020, secondary market



9/10/2020	BNSF	UP
Non-shuttle	n/a	n/a
Shuttle	\$700	\$388

● 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 \$194 below 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: 9/10/2020		Delivery period					
		Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-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
	Change from same week 2019	n/a	n/a	n/a	n/a	n/a	n/a
Shuttle	BNSF-GF	1000	1283	700	n/a	n/a	n/a
	Change from last week	400	266	n/a	n/a	n/a	n/a
	Change from same week 2019	1150	n/a	n/a	n/a	n/a	n/a
	UP-Pool	600	900	388	150	50	n/a
	Change from last week	87	(117)	163	100	0	n/a
	Change from same week 2019	838	1100	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

September 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	-1
	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	-2
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$95	\$51.80	\$1.41	-3
	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
Soybeans	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
	Minneapolis, MN	New Orleans, LA	\$3,631	\$37	\$36.43	\$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	0
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	0
	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	2
	Minneapolis, MN	Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,000	\$0	\$49.65	\$1.26	0
	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: September 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	\$29	\$44.53	\$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	\$99	\$85.60	\$2.17	-1
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,643	\$97	\$79.08	\$2.01	-1
	SD	Torreon, CU	\$7,690	\$0	\$78.57	\$1.99	0
Soybeans	MO	Bojay (Tula), HG	\$8,522	\$354	\$90.68	\$2.47	-1
	NE	Guadalajara, JA	\$9,132	\$362	\$97.00	\$2.64	-1
	IA	El Castillo, JA	\$9,410	\$0	\$96.15	\$2.61	0
	KS	Torreon, CU	\$7,989	\$238	\$84.05	\$2.29	0
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	Torreon, CU	\$7,092	\$210	\$74.61	\$1.89	-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.

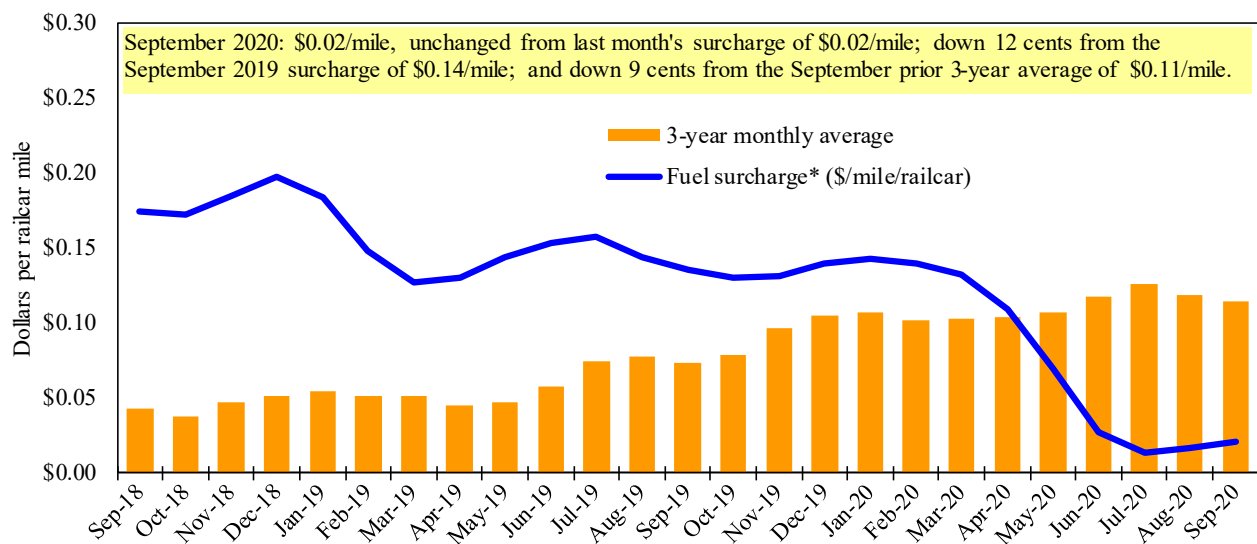
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

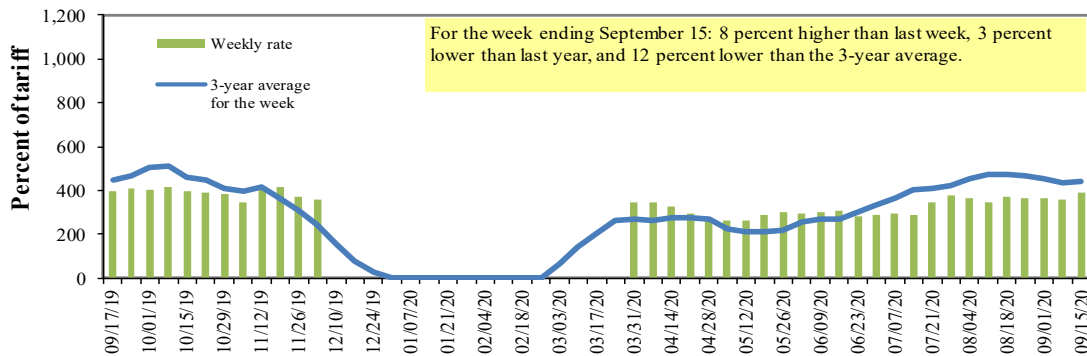
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 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	9/15/2020	431	388	-	290	385	385	294
	9/8/2020	418	358	-	264	313	313	255
\$/ton	9/15/2020	26.68	20.64	-	11.57	18.06	15.55	9.23
	9/8/2020	25.87	19.05	-	10.53	14.68	12.65	8.01
Current week % change from the same week:								
	Last year	16	-3	-	-18	6	6	-26
	3-year avg. ²	-5	-12	-	-18	-5	-5	-15
Rate¹	September	515	487	-	366	478	478	357
	November	0	0	385	275	318	318	250

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

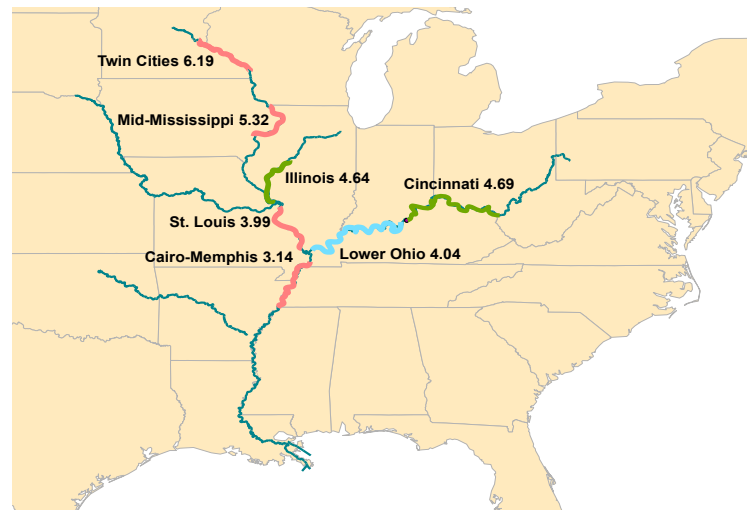
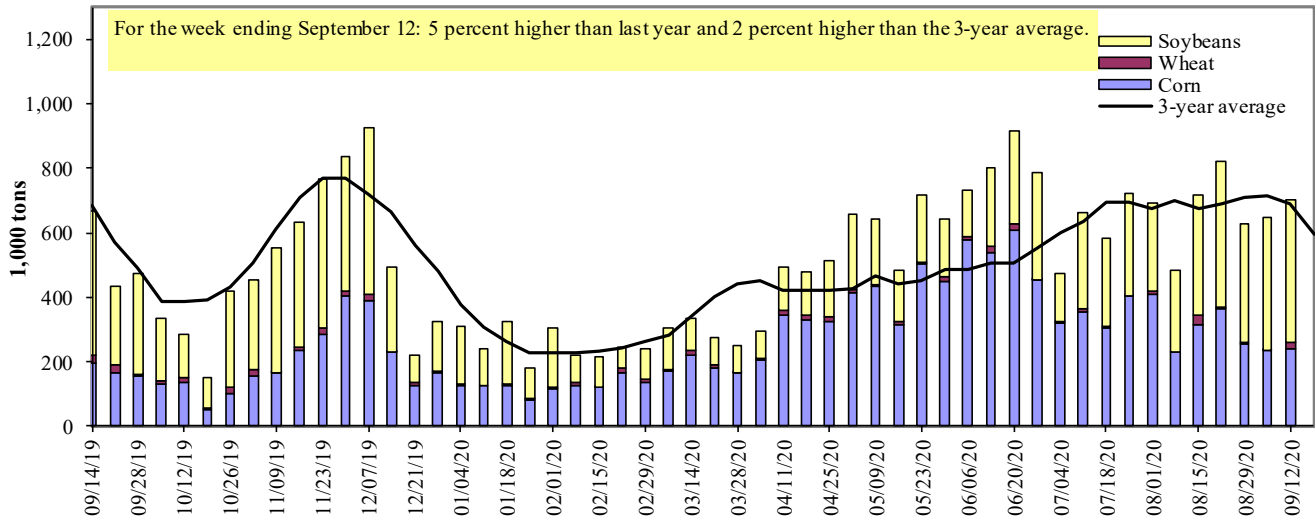


Figure 10

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 09/12/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	132	2	200	0	333
Winfield, MO (L25)	177	21	378	0	575
Alton, IL (L26)	202	21	401	0	624
Granite City, IL (L27)	238	22	442	0	702
Illinois River (La Grange)	0	0	0	0	0
Ohio River (Olmsted)	11	2	45	0	57
Arkansas River (L1)	0	28	17	0	45
Weekly total - 2020	248	52	503	0	804
Weekly total - 2019	211	36	482	7	736
2020 YTD ¹	13,278	1,451	10,384	116	25,228
2019 YTD ¹	8,962	1,247	8,682	129	19,019
2020 as % of 2019 YTD	148	116	120	90	133
Last 4 weeks as % of 2019 ²	140	131	112	42	121
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.

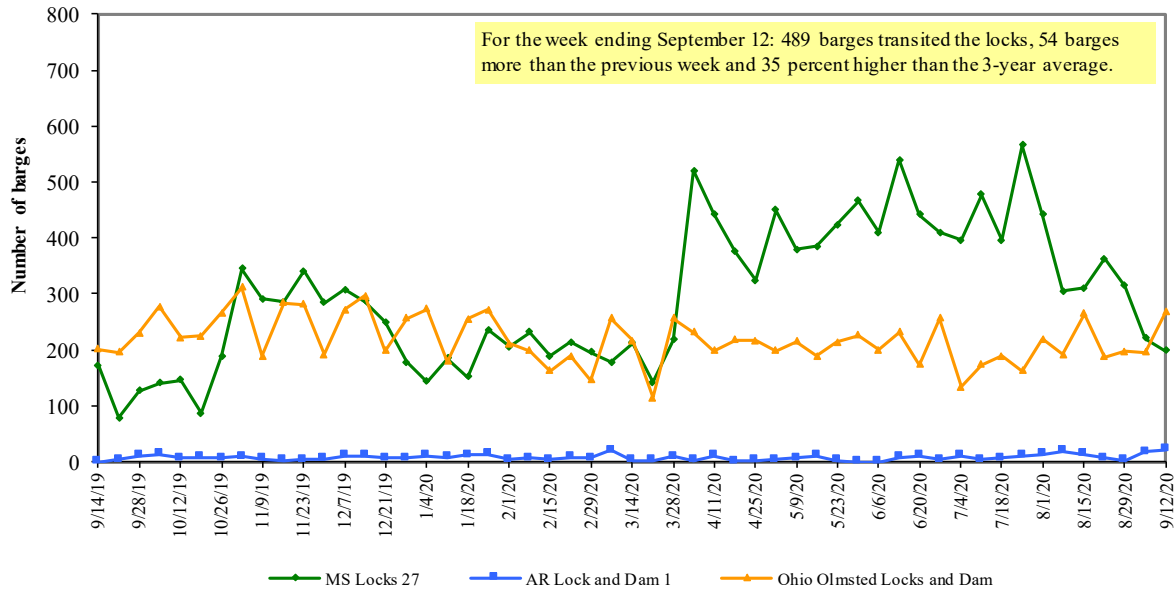
² As a percent of same period in 2019.

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

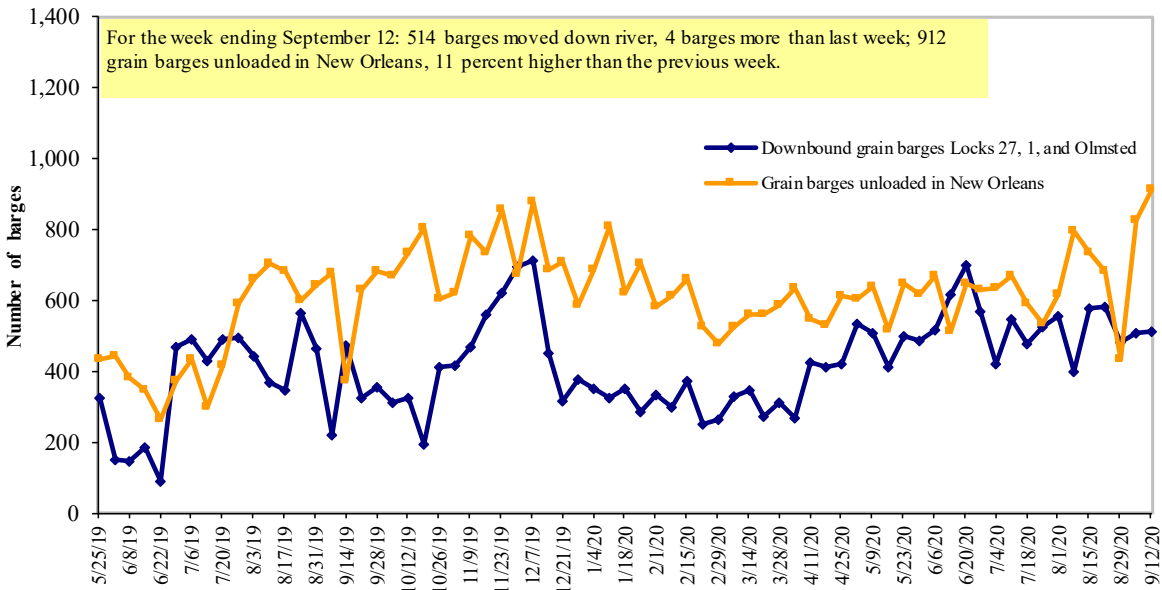
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 9/14/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.499	-0.012	-0.499
	New England	2.605	-0.007	-0.408
	Central Atlantic	2.676	-0.013	-0.501
	Lower Atlantic	2.357	-0.013	-0.517
II	Midwest	2.308	-0.013	-0.574
III	Gulf Coast	2.172	-0.012	-0.589
IV	Rocky Mountain	2.368	-0.010	-0.591
	West Coast	2.955	-0.009	-0.619
V	West Coast less California	2.575	-0.009	-0.586
	California	3.267	-0.009	-0.634
Total	United States	2.422	-0.013	-0.565

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

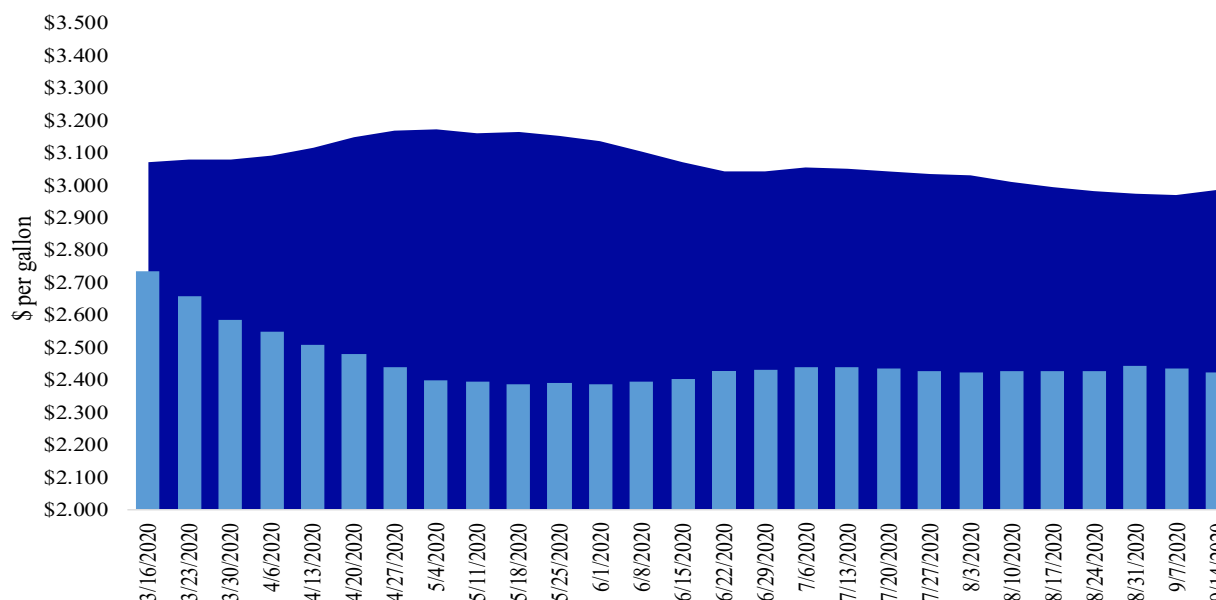
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending September 14, the U.S. average diesel fuel price decreased 1.3 cents from the previous week to \$2.422 per gallon, 56.5 cents below the same week last year.

■ Last year ■ Current year
\$2.987 \$2.422



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									
9/3/2020	1,856	518	1,832	1,226	257	5,688	18,601	29,360	53,649
This week year ago	1,425	681	1,717	1,018	303	5,143	6,778	9,033	20,954
Cumulative exports-marketing year²									
2020/21 YTD	3,001	568	1,974	1,486	232	7,260	246	526	8,032
2019/20 YTD	3,069	837	1,642	1,129	186	6,863	412	420	7,695
YTD 2019/20 as % of 2018/19	98	68	120	132	124	106	60	125	104
Last 4 wks. as % of same period 2018/19*	127	91	110	119	86	113	96	118	110
Total 2019/20	9,526	2,318	6,960	4,751	922	24,477	42,622	43,994	111,094
Total 2018/19	8,591	3,204	6,776	5,164	479	24,214	48,924	46,189	119,327

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 09/03/2020	Total commitments ²		% change current MY from last MY	Exports ³ 3-yr. avg. 2016-18
	2020/21 current MY	2019/20 last MY		
	- 1,000 mt -			
Mexico	3,516	3,619	(3)	14,659
Japan	1,867	944	98	11,955
Korea	68	70	(2)	4,977
Colombia	509	196	159	4,692
Peru	132	0	-	2,808
Top 5 importers	6,092	4,829	26	39,091
Total U.S. corn export sales	18,847	7,190	162	54,024
% of projected exports	32%	16%		
Change from prior week ²	1,823	499		
Top 5 importers' share of U.S. corn export sales	32%	67%		72%
USDA forecast September 2020	59,160	44,911	32	
Corn use for ethanol USDA forecast, September 2020	129,540	123,317	5	

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 (carry over 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 9/03/2020	Total 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 -
China	15,875	1,070	1383	25,733
Mexico	1,629	1,896	(14)	4,271
Indonesia	376	205	84	2,386
Japan	476	460	4	2,243
Egypt	427	342	25	1,983
Top 5 importers	18,783	3,972	373	36,616
Total U.S. soybean export sales	29,886	9,453	216	53,746
% of projected exports	52%	21%		
change from prior week ²	3,162	1,116		
Top 5 importers' share of U.S. soybean export sales	63%	42%		68%
USDA forecast, September 2020	57,902	45,777	126	

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 9/03/2020	Total 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	1,328	1,703	(22)	3,213
Philippines	1,889	1,447	31	2,888
Japan	1,237	1,155	7	2,655
Nigeria	609	765	(20)	1,433
Korea	680	704	(3)	1,372
Indonesia	459	370	24	1,195
Taiwan	581	557	4	1,175
Thailand	301	375	(20)	727
Italy	402	382	5	622
Colombia	176	349	(50)	618
Top 10 importers	7,661	7,806	(2)	15,897
Total U.S. wheat export sales	12,948	12,006	8	23,821
% of projected exports	49%	46%		
change from prior week ²	484	611		
Top 10 importers' share of U.S. wheat export sales	59%	65%		67%
USDA forecast, September 2020	26,567	26,294	1	

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 09/10/20	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	347	471	74	11,612	9,648	120	148	134	13,961
Corn	203	194	105	7,652	6,859	112	n/a	166	7,047
Soybeans	296	281	105	3,801	7,400	51	95	129	11,969
Total	845	946	89	23,066	23,906	96	160	139	32,977
Mississippi Gulf									
Wheat	100	126	79	2,766	3,653	76	90	113	4,448
Corn	482	483	100	20,482	16,422	125	118	81	20,763
Soybeans	833	1,000	83	16,904	17,997	94	129	133	31,398
Total	1,416	1,609	88	40,152	38,072	105	122	110	56,609
Texas Gulf									
Wheat	122	67	182	3,179	5,025	63	84	111	6,009
Corn	0	0	n/a	538	563	95	39	64	640
Soybeans	55	89	62	313	2	n/a	n/a	n/a	2
Total	177	156	114	4,030	5,590	72	135	186	6,650
Interior									
Wheat	35	26	135	1,559	1,378	113	89	78	1,987
Corn	171	167	102	6,044	5,450	111	109	94	7,857
Soybeans	89	75	120	4,454	4,878	91	78	91	7,043
Total	294	268	110	12,057	11,706	103	94	91	16,887
Great Lakes									
Wheat	68	44	153	595	705	84	174	187	1,339
Corn	0	28	0	54	0	n/a	n/a	281	11
Soybeans	23	20	113	283	445	64	252	114	493
Total	91	93	98	932	1,150	81	218	154	1,844
Atlantic									
Wheat	0	1	0	26	35	73	249	327	37
Corn	7	0	n/a	15	94	16	259	148	99
Soybeans	3	5	51	497	986	50	19	39	1,353
Total	10	6	150	538	1,116	48	29	56	1,489
U.S. total from ports*									
Wheat	671	736	91	19,738	20,445	97	122	125	27,781
Corn	863	872	99	34,785	29,388	118	151	97	36,417
Soybeans	1,299	1,469	88	26,252	31,708	83	119	133	52,258
Total	2,833	3,078	92	80,775	81,540	99	128	118	116,457

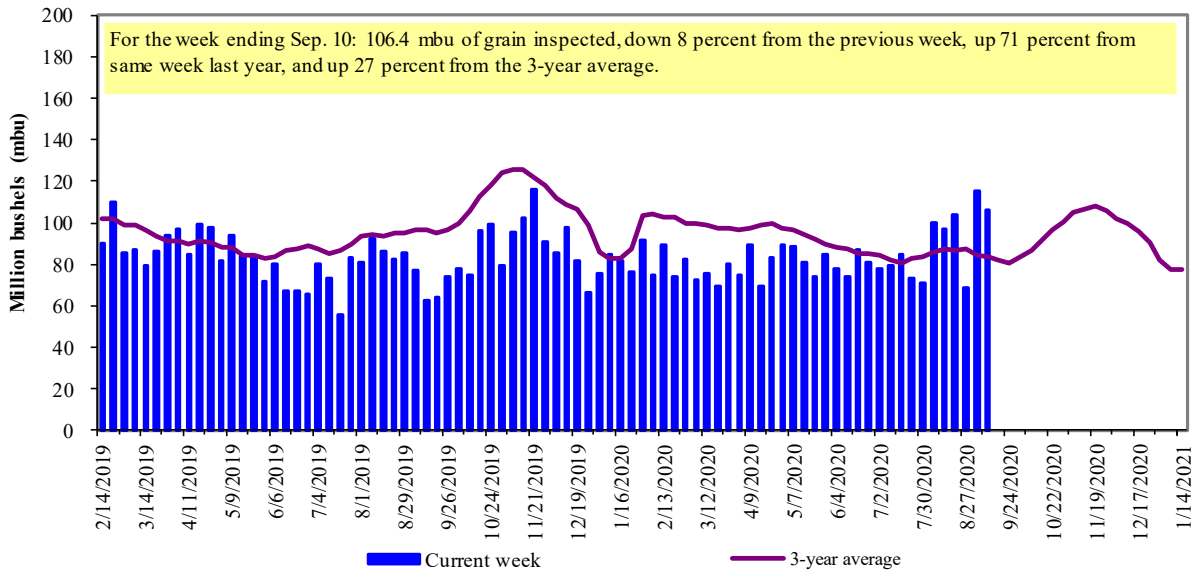
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

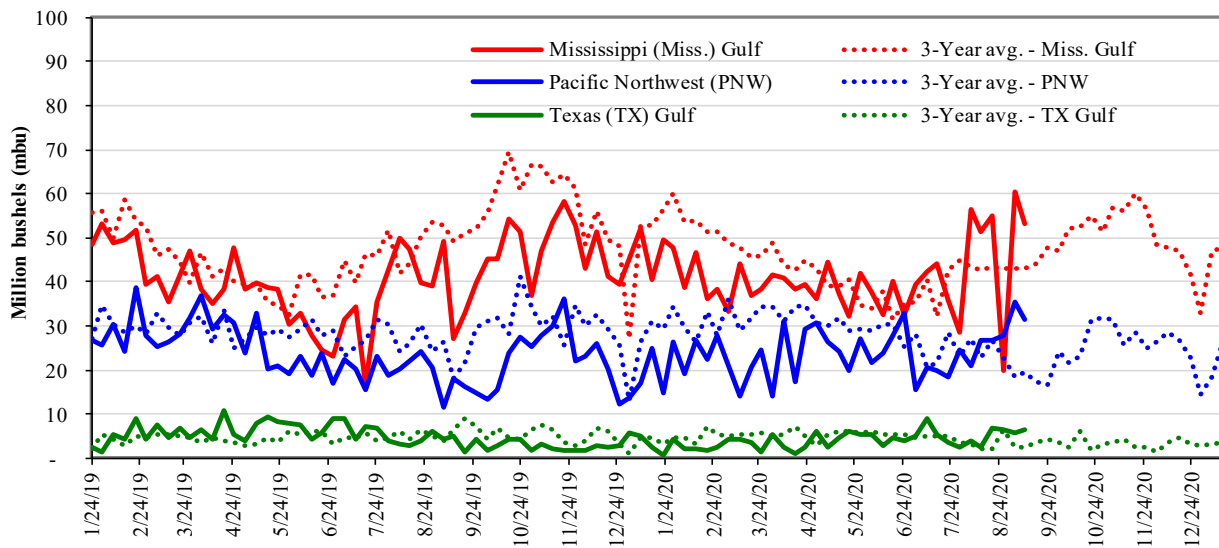


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 09/10/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 53.3	Last wk:	down 12	up 14	down 10	down 10
PNW: 31.6	Last Year (same wk):	up 97	up 34	up 88	up 73
TX Gulf: 6.5	3-yr avg. (4-wk. mov. Avg):	up 23	up 90	up 28	up 45

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

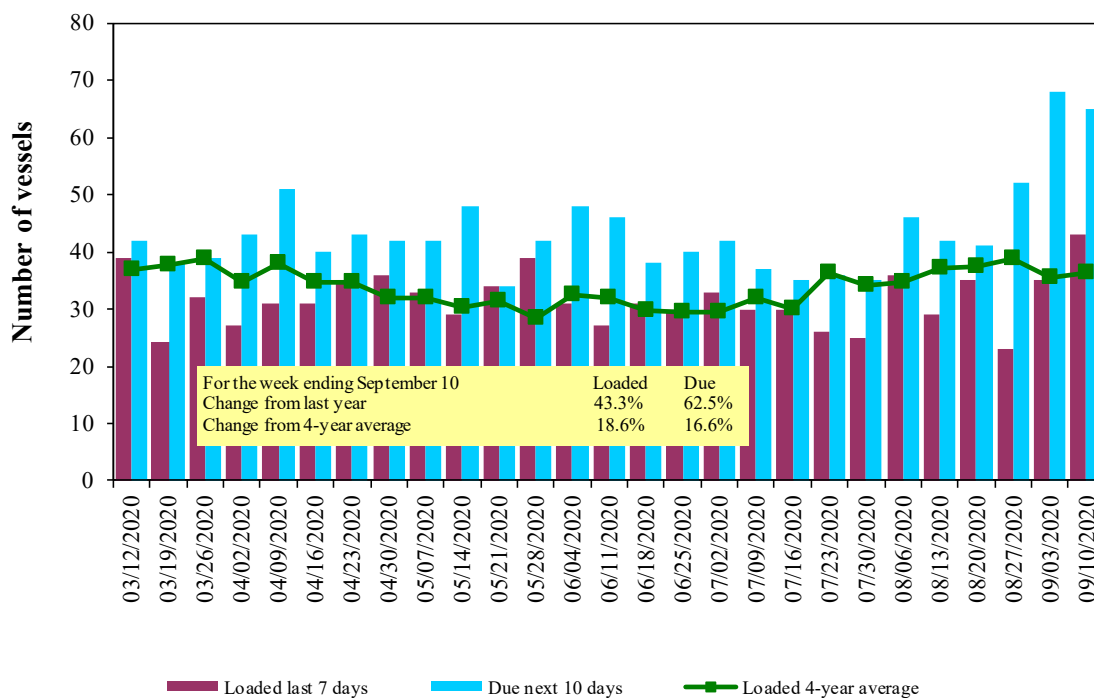
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
9/10/2020	35	43	65	13
9/3/2020	32	35	68	13
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Source: USDA, Agricultural Marketing Service.

Figure 16

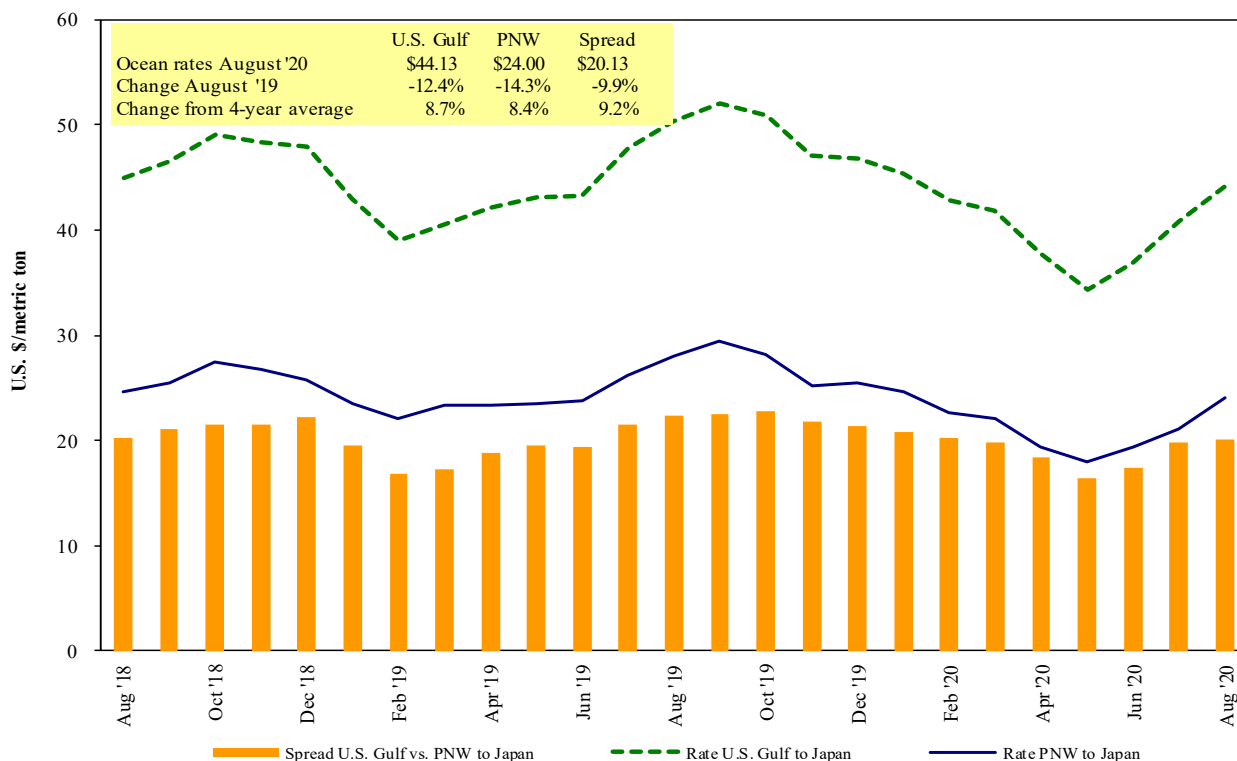
U.S. Gulf¹ vessel loading activity



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 09/12/2020

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	Djibouti	Wheat	Oct 16/26	12,180	94.48*
U.S. Gulf	Djibouti	Wheat	Sep 18/28	15,810	54.86*
U.S. Gulf	Mozambique	Sorghum	Aug 10/20	30,780	41.35
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*
Vancouver	Japan	Wheat	Sep 15/30	20,000	24.30
Vancouver	Japan	Canola	Sep 15/30	30,000	24.30
Brazil	Japan	Corn	Sep 11/20	49,000	34.75
Brazil	Japan	Corn	Sep 1/10	60,000	34.00

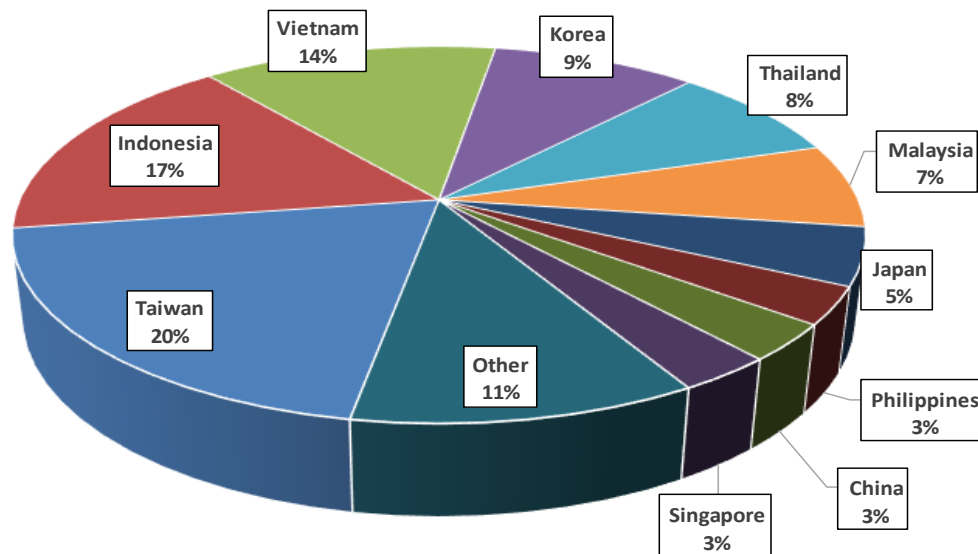
*50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels.

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.

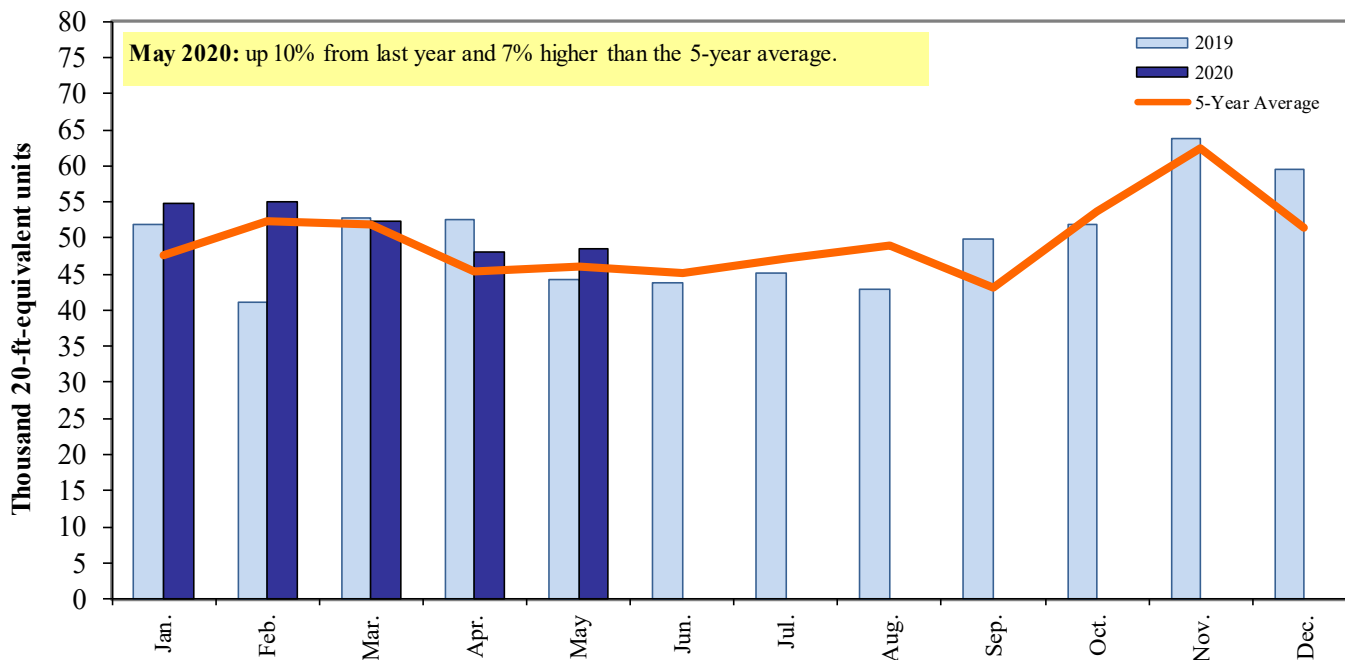
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-May 2020



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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