



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
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WEEKLY HIGHLIGHTS

December 10, 2020

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Pacific Northwest Inspections Reach High for the Year; Total Exports Down

For the week ending December 3, **total inspections of grain** (corn, wheat, and soybeans) for export from all major U.S. export regions totaled 3.6 million metric tons (mmt). Total grain inspections were down 11 percent from the previous week, up 59 percent from last year, and up 33 percent from the 3-year average. From the previous week, wheat and soybeans were down slightly, but corn inspections dropped 29 percent, mainly because corn shipments to Asia fell 47 percent. At 1.35 mmt, Pacific Northwest (PNW) grain inspections reached a high for the year, increasing 28 percent from the previous week. The week-to-week increase in PNW inspections, however, could not offset the 35-percent drop in the Mississippi Gulf and the 20-percent decrease in the Texas Gulf. During the last 4 weeks, grain inspections were 42 percent above the same time last year and 38 percent above the 3-year average.

Upper Mississippi River Navigation System Ended on November 30

On November 30, the U.S. Army Corps of Engineers, St. Paul District, recorded the last 2020 traffic of the Mississippi Lock and Dam 2 (Hastings, MN). Typically, from late November or early December until mid-March or early April, the Corps shuts down navigation of the Upper Mississippi River in Minnesota, Wisconsin, and Iowa. The closure is mostly to avoid navigation through ice. During this period, no grain barge spot rates will be available for the Twin City and Mid-Mississippi locations (**GTR Table 9**). Also, note the Corps is scheduled to start its winter renovation and maintenance at Lock and Dam 4 (Alma, WI) around December 7. This repair work requires the Lock to be completely closed until March 14, 2021.

STB Schedules Technical Conference Exploring Class Exemption Issues

In a technical conference on December 18, the Surface Transportation Board (STB) will discuss its prospective approach for considering class exemptions from rail regulation. STB and its predecessor, the Interstate Commerce Commission, have long had broad authority to exempt certain rail traffic from regulation, when such regulation “is not needed to protect shippers from the abuse of market power” (49 U.S.C. § 10502). Exempt classes include many agricultural commodities (e.g., cottonseed, dry beans, dry peas, and hay), as well as types of service (e.g., trailer-on-flatcar, container-on-flatcar, or boxcar). While grain is nonexempt and subject to STB regulation, the conference could provide a glimpse into broad issues relevant to grain shippers. These issues include STB’s possible review of rail market power and the nature of competition in rail transportation. Those interested in the virtual conference should register by December 11.

Snapshots by Sector

Export Sales

For the week ending November 26, **unshipped balances** of wheat, corn, and soybeans totaled 59.3 million metric tons (mmt). This was 3 percent lower than last week, but still represented a significant increase in outstanding sales from the same time last year. Net **corn export sales** were 1.372 mmt, down 18 percent from the past week. Net **soybean export sales** were 0.407 mmt, down 47 percent from the previous week. Net **wheat export sales** were 0.446 mmt, down 44 percent from the previous week.

Rail

U.S. Class I railroads originated 25,099 **grain carloads** during the week ending November 28. This was unchanged from the previous week, 23 percent more than last year, and 22 percent more than the 3-year average.

Average December shuttle **secondary railcar** bids/offers (per car) were \$42 above tariff for the week ending December 3. This was \$13 less than last week and \$679 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending December 5, **barge grain movements** totaled 825,395 tons. This was 26 percent less than the previous week and 25 percent less than the same period last year.

For the week ending December 5, 522 grain barges **moved down river**—185 barges fewer than the previous week. There were 902 grain barges **unloaded in New Orleans**, 8 percent lower than the previous week.

Ocean

For the week ending December 3, 35 **oceangoing grain vessels** were loaded in the Gulf—13 percent more than the same period last year. Within the next 10 days (starting December 4), 62 vessels were expected to be loaded—44 percent more than the same period last year.

As of December 3, 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 last available rate on November 19. The rate from PNW to Japan was \$23.25 per mt, 1 percent more than the rate on November 19.

Fuel

For the week ending December 7, the U.S. average **diesel fuel price** increased 2.4 cents from the previous week to \$2.526 per gallon, 52.3 cents below the same week last year.

Feature Article/Calendar

Overview of In-State and Cross-State Truck Shipments of Grain and Oilseeds

In terms of sheer volume, trucking moves more grain than any other mode, often providing the first and last mile of service. From 2010 to 2016, trucks moved more than 60 percent of all U.S. major grain and oilseeds from farms to domestic or export destinations.¹ Because trucking is central to grain transportation, safe, well-maintained rural and urban roadways are critical to maintaining a competitive grain industry.

Examining truck movements of grain and oilseeds is useful for developing a more complete picture of the grain transportation industry. However, data on grain truck movements are not readily available. Using one of the few data sources available for the public on trucking—the Commodity Flow Survey (CFS)²—this article highlights in-State and cross-State patterns of truck movements of grains and oilseeds.

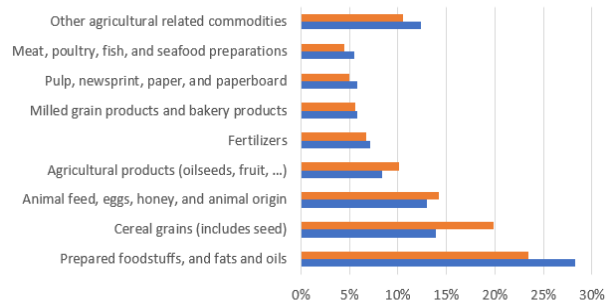
Grain and Agricultural Product Shipments: 2012 vs. 2017

From 2012 to 2017, the tonnages of all agricultural commodities moved by truck increased from 1.6 billion tons to 1.9 billion tons.³ Figure 1 shows the major commodities ranked by the tonnages. The categories and ranks of the top five agricultural commodities remained the same, comprising more than 70 percent of the total movements (fig. 1). Though most categories included in figure 1 declined from 2012 to 2017, the cereal grains' share of total agricultural commodity movements increased from 14 percent to 20 percent, while agricultural products' (mostly oilseeds, fruits, and vegetable) share increased from 8 percent to 10 percent. Figure 1 suggests the role of trucks in grain and oilseed transportation has increased, although some of this effect could be due to the severe Midwest drought in 2012. The drought significantly curtailed grain production and demand for grain transportation.

In-State Truck Movements

Most grain is produced in the Midwest, with other substantial contributions from the Mid Atlantic, Pacific Northwest, and in proximity to the Mississippi River navigation system. Major in-State grain truck movements occurred in these production locations. In 2017, in-State grain truck movements for the top five States—Iowa, Illinois, Kansas, Nebraska, and Texas—totaled about 185

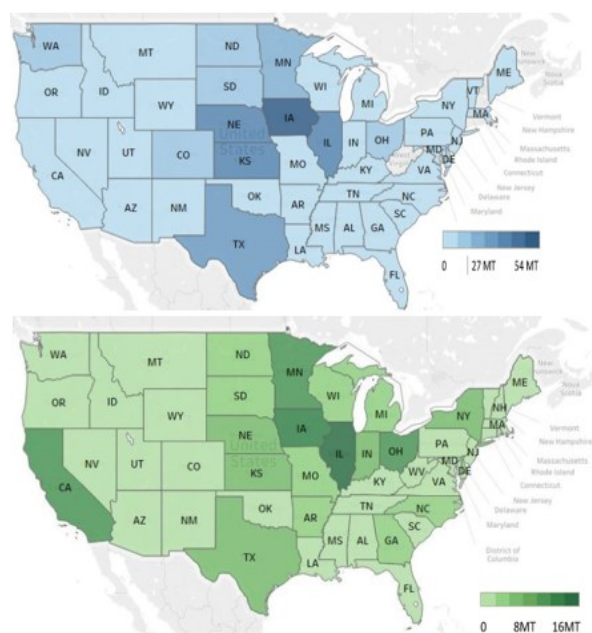
Figure 1. Top Agricultural commodities movements: 2012 vs. 2017



Source: Commodity Flow Survey; U.S. Census Bureau.

2)

Figure 2. Cereal grain (top) and agricultural products (bottom) movements by truck (in-State only), 2017



Source: Commodity Flow Survey; U.S. Census Bureau.

¹ USDA, Agricultural Marketing Service, [Transportation of US grains. A Modal Share Analysis](#); April, 2019.

² The CFS is conducted every 5 years by the U.S. Census Bureau in partnership with the U.S. Department of Transportation's Bureau of Transportation Statistics. The CFS is a shipper survey of approximately 100,000 establishments from the industries of mining, manufacturing, wholesale trade, auxiliaries (i.e. warehouses and distribution centers), and select retail and service trade industries that ship commodities. The CFS does not include the initial short-distance movement, farm-gate level (first-mile) movements. To complete the CFS, participating establishments report on samples of individual shipments for 1 week per calendar quarter (4 reporting weeks total).

³ "Agricultural commodities" refers to the same definition applied by the *Rural Transportation Report* published by USDA/AMS/Transportation and Marketing. That definition includes cereal grains, agricultural products and other agricultural-related commodities. "Cereal grains" refers to category 2 of the CFS Standard Classification of Transported Good (SCTG) code such as corn, wheat, and rice. "Agricultural products" includes SCTG code category 3 commodities. Although STCG03 includes oil seeds, vegetables, fruit, and other agricultural products, an examination of the agricultural tonnages in these top States shows that they are predominantly soybeans, while California is fruits and vegetables.

of corn and wheat (fig. 2, top). Because the CFS excludes farm-gate data, the in-State grain truck movements included in figure 2 represent truck movements mainly among elevators, feedlots, ethanol plants, distribution centers, and locations where rail and barge offer intermodal transportation services. Similar patterns can be seen in the in-State truck movements of soybeans and other oilseeds (fig. 2, bottom). Except California, four of the top five States—Illinois, Iowa, Minnesota, and Ohio—for in-State truck movements of oilseed and other agricultural products totaled 29 million tons in 2012 and 48 million tons in 2017, coinciding with the major production locations.

Cross-State Movements

Like in-State truck movements, cross-State movements occur in the key crop production areas, but in a less concentrated pattern (tables 1 and 2). From 2012 to 2017, cross-State cereal grain movements increased from 13.5 million tons to 25.7 million tons (table 1). However, only two routes in 2012 and no routes in 2017 received more than 10 percent of the total cross-State traffic. All the top routes represent movements between nearby States, moving crops from origins through sequential stops of the supply chain along county, State, regional, and interstate highways.

Via Interstate-29 and surrounding regional and local highways, the Nebraska-to-Kansas route carried crops from grain elevators clustered along the highway to nearby large cities or intermodal transition points—or connected to Interstate-70 for further destinations (table 1). Via a section of Interstate-94 between Minnesota and North Dakota, grain producers in the Upper Plains and Midwest moved their grain crops to nearby processing facilities, accessed rail and barge loading points, or connected to other truck shipping routes along the supply chain. As the top State for in-State grain truck movements, Iowa also received 1.4 million tons of cereal grains in 2012 and 5.4 million tons in 2017 from other nearby States, such as North Dakota, Minnesota, and Illinois. This high volume of both in-State and cross-State movements helped meet Iowa’s high grain demand for its production of hogs, eggs, and ethanol.

The pattern for cross-State oilseeds movements resembles that of cereal grain movements, but with even less concentration—no route received more than 5 percent of the total cross-State traffic (table 2). Iowa exported more than 3 million tons of crops (mostly soybeans) to nearby States by truck in 2012 and 2017, with Minnesota receiving roughly two-thirds of this volume. However, Iowa also received 2.5 million tons (2012) and 1.9 million tons (2017) of imports from nearby States—mostly from Minnesota, Nebraska, South Dakota, and Illinois. Overall, most of the top oilseed production States—South Dakota, Iowa, Illinois, and Kansas—trucked more oilseeds to neighboring States than they received. Minnesota, Missouri, and Indiana were the top States to receive oilseed truck shipments from out of State.

Trucking serves a key role for the U.S. grain and oilseeds industry to move commodities from farm gates to the next and final destinations along the supply chain. A more thorough examination of supply chains, market dynamics, and highway corridors is necessary to study grain truck patterns at the route level. However, this article highlights the major trends for in-State and cross-State grain and oilseed truck movements from 2012 to 2017, suggesting an increased reliance by the U.S. grain and oilseed industry on both interstate highways and local roads for reaching domestic and export markets.

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Table 1. Cross-State truck movements: cereal grains

Rank	2012			2017		
	O-D	Tons	Percentage	O-D	Tons	Percentage
1	NE-KS	3,163,506	12	MN-ND	4,815,338	9
2	MN-ND	3,008,139	11	ND-MN	2,922,343	6
3	CO-NE	1,861,209	7	SD-IA	2,763,238	5
4	OK-KS	1,306,193	5	IL-IN	2,637,918	5
5	OK-TX	1,128,450	4	KS-OK	2,613,823	5
6	TN-AL	740,127	3	NE-CO	2,213,451	4
7	SD-MN	703,939	3	TX-CO	2,143,320	4
8	KS-MO	573,649	2	MN-IA	2,079,249	4
9	NE-IA	544,097	2	IL-MO	1,838,210	3
10	KS-OK	499,759	2	KS-MO	1,678,121	3
Total		13,529,068	51		25,705,011	49

Source: Commodity Flow Survey; U.S. Census Bureau.

Table 2. Cross-State truck movements: Ag products

Rank	2012			2017		
	O-D	Tons	Percentage	O-D	Tons	Percentage
1	IA-MN	2,002,875	4	IA-MN	2,125,915	3
2	KS-MO	1,102,864	2	MI-OH	1,793,534	3
3	MN-IA	1,053,398	2	IL-IN	1,609,551	3
4	WI-IL	930,733	2	IL-MO	1,253,748	2
5	TN-LA	855,882	2	SD-IA	1,251,377	2
6	NE-IA	811,703	2	KS-MO	1,147,638	2
7	SD-MN	750,213	2	SD-ND	953,263	2
8	NJ-NY	748,601	2	IL-WI	900,185	1
9	NY-NJ	748,300	2	AZ-CA	891,515	1
10	MI-OH	584,991	1	NY-NJ	889,373	1
Total		9,589,561	21		12,816,099	20

Source: Commodity Flow Survey; U.S. Census Bureau.

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
12/09/20	170	288	222	232	186	165
12/02/20	168	288	223	258	n/a	n/a

¹Indicator: Base year 2000 = 100. Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market bid and monthly tariff rate with fuel surcharge (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan (\$/metric ton); n/a = not available.

Source: USDA, Agricultural Marketing Service.

Table 2

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

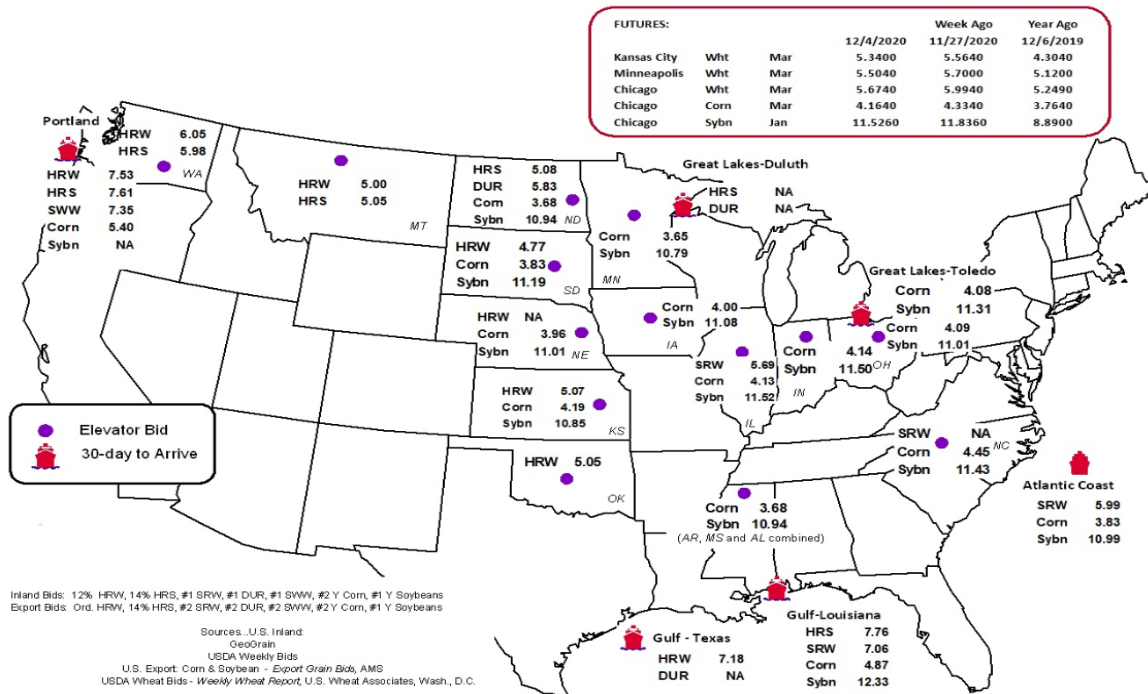
Commodity	Origin-destination	12/4/2020	11/27/2020
Corn	IL-Gulf	-0.74	-0.75
Corn	NE-Gulf	-0.91	-0.82
Soybean	IA-Gulf	-1.25	-1.10
HRW	KS-Gulf	-2.11	n/a
HRS	ND-Portland	-2.53	n/a

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			
12/2/2020 ^p	1,283	2,100	8,136	932	12,451	11/28/2020	3,125
11/25/2020 ^r	2,439	2,151	7,583	1,004	13,177	11/21/2020	2,794
2020 YTD ^r	38,223	56,905	268,336	20,474	383,938	2020 YTD	117,386
2019 YTD ^r	39,449	49,593	239,061	15,668	343,771	2019 YTD	119,002
2020 YTD as % of 2019 YTD	97	115	112	131	112	% change YTD	99
Last 4 weeks as % of 2019 ²	424	390	150	855	204	Last 4wks. % 2019	94
Last 4 weeks as % of 4-year avg. ²	285	195	135	196	159	Last 4wks. % 4 yr.	100
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.

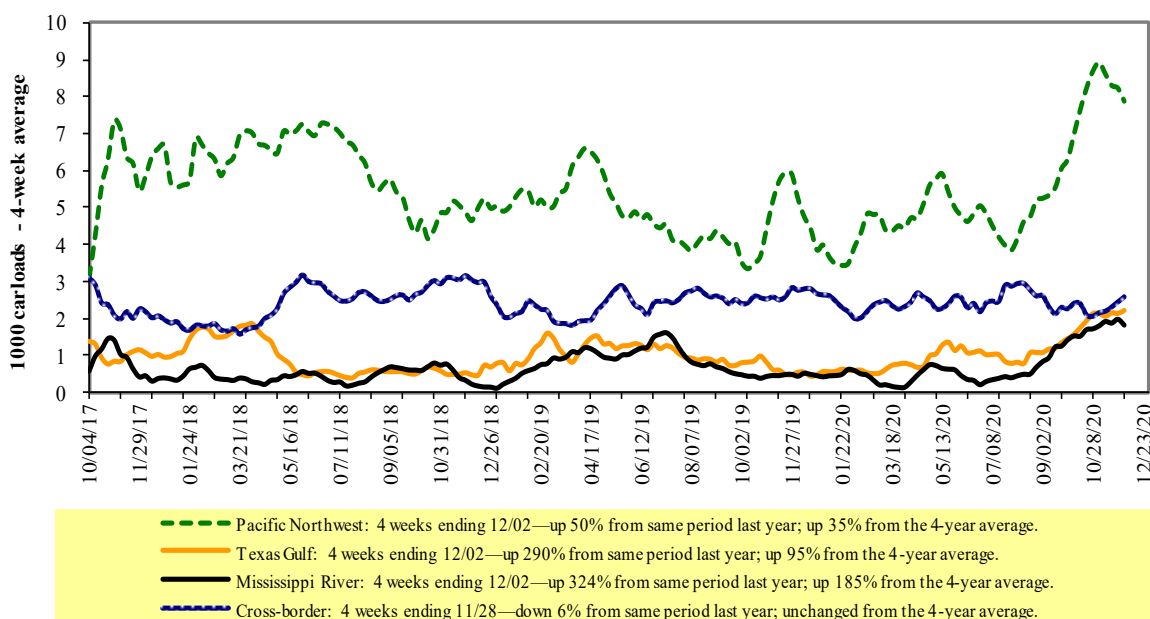
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 11/28/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	1,991	2,408	14,049	1,167	5,484	25,099	5,726	6,845
This week last year	1,449	2,510	10,727	972	4,751	20,409	2,940	5,122
2020 YTD	81,844	117,900	547,282	52,584	262,332	1,061,942	213,068	233,129
2019 YTD	85,667	127,545	524,959	54,471	241,988	1,034,630	194,775	217,193
2020 YTD as % of 2019 YTD	96	92	104	97	108	103	109	107
Last 4 weeks as % of 2019*	138	119	118	103	139	123	148	121
Last 4 weeks as % of 3-yr. avg.**	119	113	121	120	134	123	133	124
Total 2019	91,611	136,941	568,369	58,527	260,269	1,115,717	212,339	235,892

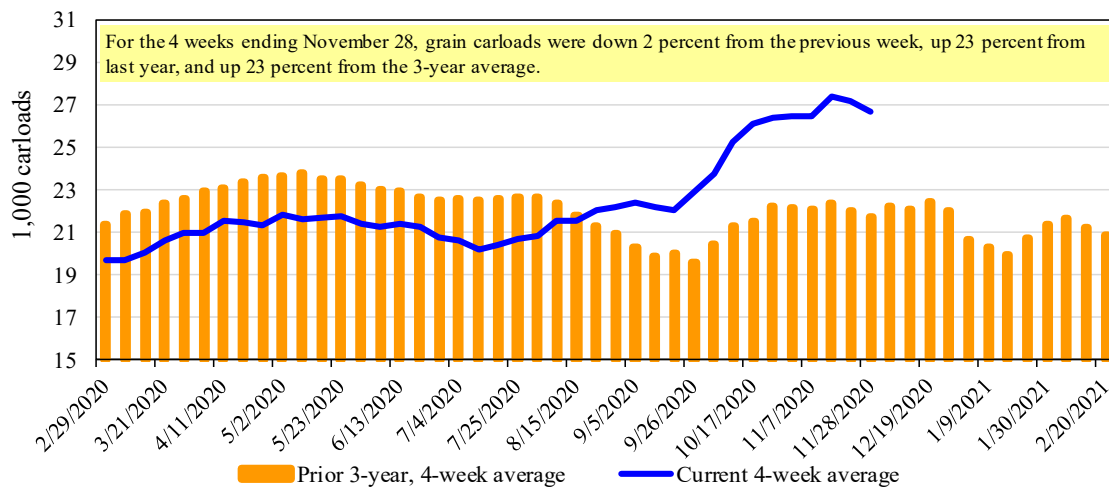
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 12/3/2020		Delivery period							
		Dec-20	Dec-19	Jan-21	Jan-20	Feb-21	Feb-20	Mar-21	Mar-20
BNSF ³	COT grain units	no bids	0	0	0	no bids	no bid	no bids	no bid
	COT grain single-car	101	0	173	2	174	0	135	0
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 bid	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.

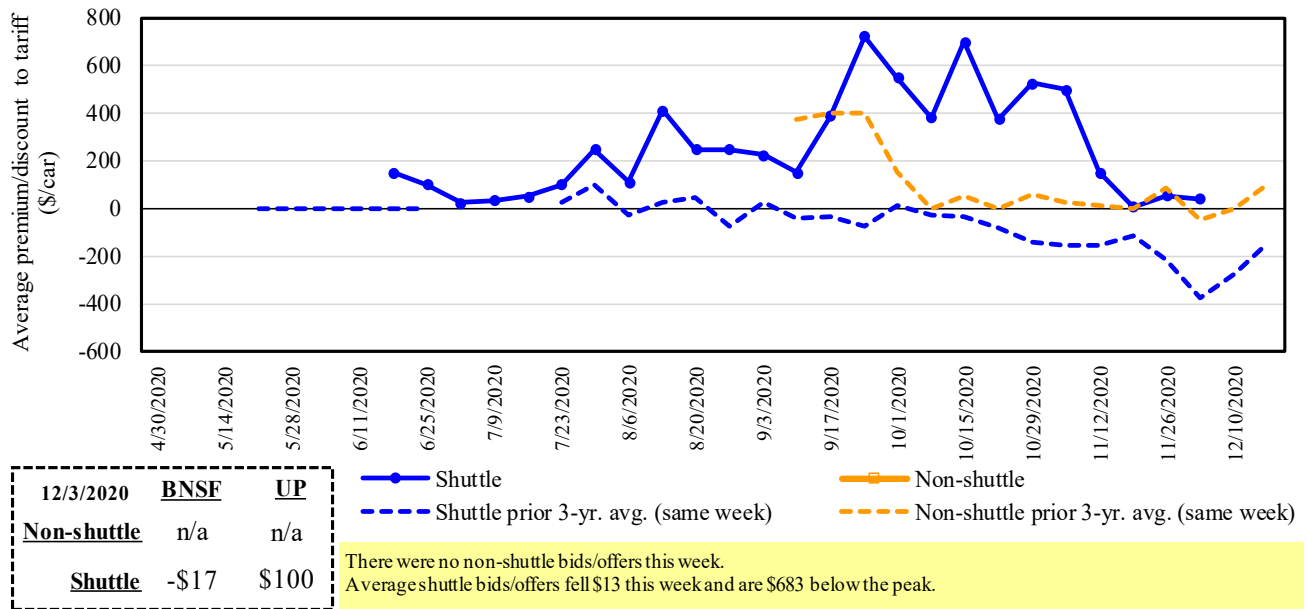
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

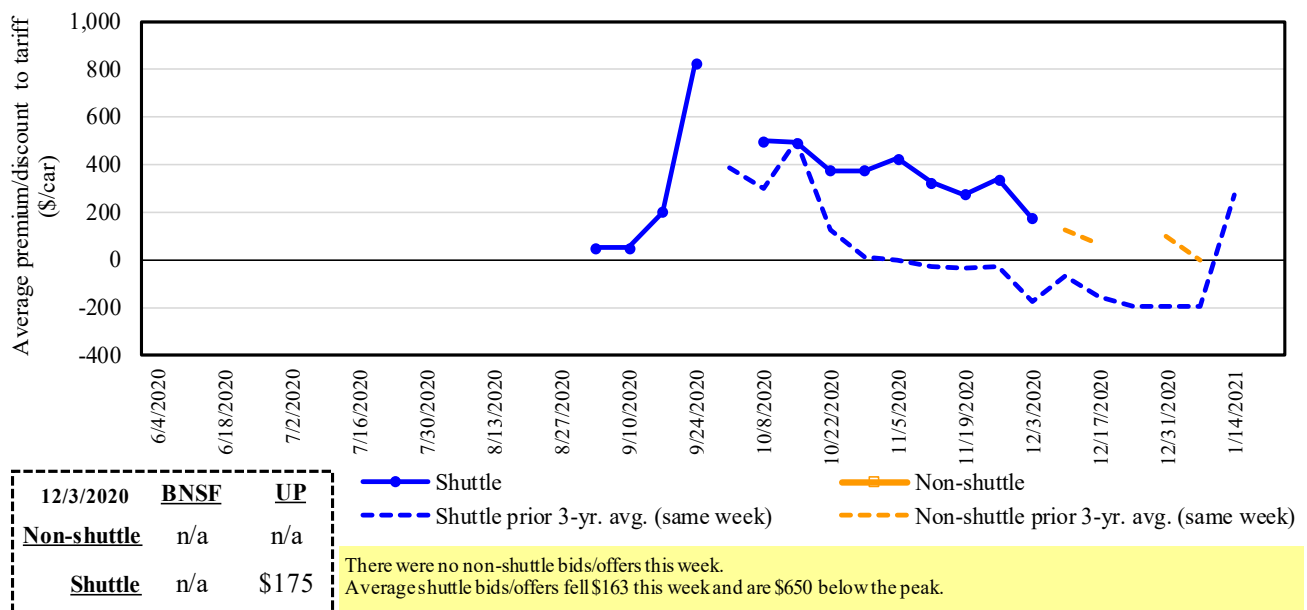
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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

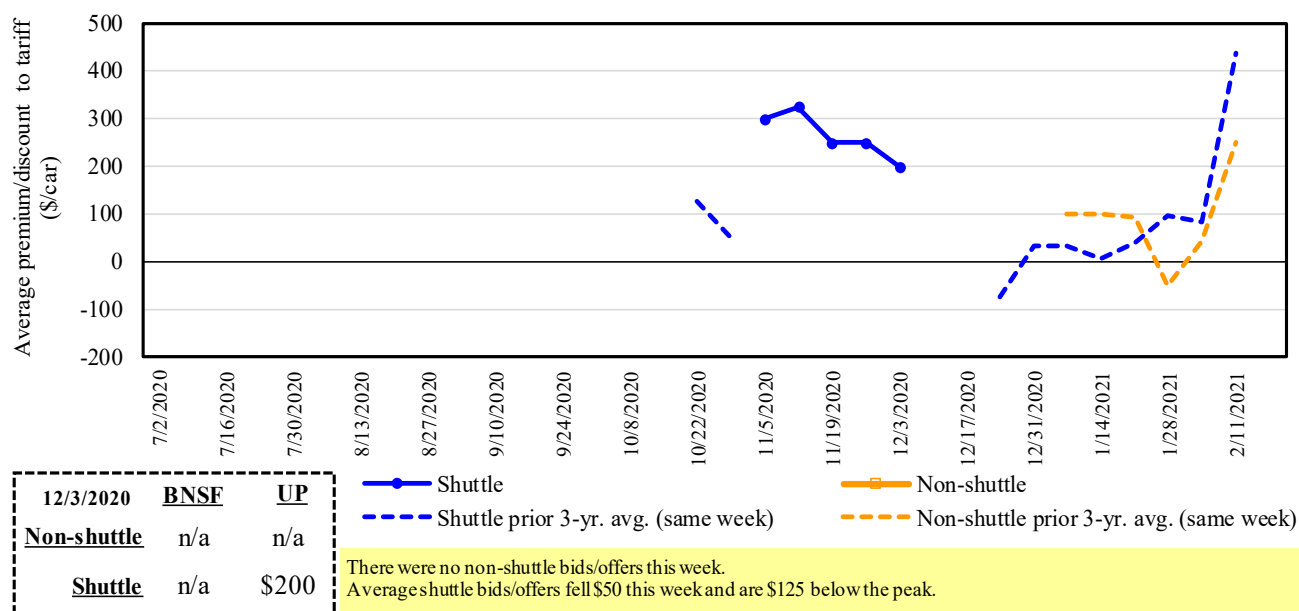
Figure 5
Bids/offers for railcars to be delivered in January 2021, secondary market



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 February 2021, secondary market



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

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending:		Delivery period					
		12/3/2020	Dec-20	Jan-21	Feb-21	Mar-21	Apr-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	(17)	n/a	n/a	n/a	n/a	n/a
	Change from last week	(114)	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	583	n/a	n/a	n/a	n/a	n/a
	UP-Pool	100	175	200	100	n/a	n/a
	Change from last week	87	(125)	(50)	(100)	n/a	n/a
Change from same week 2019	775	n/a	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

December 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	\$30	\$39.85	\$1.08	-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	\$53	\$45.47	\$1.24	-3
	Sioux Falls, SD	Galveston-Houston, TX	\$6,851	\$0	\$68.03	\$1.85	-2
	Colby, KS	Galveston-Houston, TX	\$4,801	\$59	\$48.26	\$1.31	-3
	Amarillo, TX	Los Angeles, CA	\$5,121	\$81	\$51.66	\$1.41	-4
Corn	Champaign-Urbana, IL	New Orleans, LA	\$3,900	\$60	\$39.33	\$1.00	-3
	Toledo, OH	Raleigh, NC	\$7,833	\$0	\$77.79	\$1.98	15
	Des Moines, IA	Davenport, IA	\$2,455	\$13	\$24.51	\$0.62	0
	Indianapolis, IN	Atlanta, GA	\$5,979	\$0	\$59.37	\$1.51	3
	Indianapolis, IN	Knoxville, TN	\$5,040	\$0	\$50.05	\$1.27	3
	Des Moines, IA	Little Rock, AR	\$3,900	\$38	\$39.10	\$0.99	0
	Des Moines, IA	Los Angeles, CA	\$5,780	\$109	\$58.48	\$1.49	-3
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,631	\$22	\$36.28	\$0.99	-4
	Toledo, OH	Huntsville, AL	\$6,595	\$0	\$65.49	\$1.78	17
	Indianapolis, IN	Raleigh, NC	\$7,125	\$0	\$70.75	\$1.93	3
	Indianapolis, IN	Huntsville, AL	\$5,247	\$0	\$52.11	\$1.42	3
	Champaign-Urbana, IL	New Orleans, LA	\$4,645	\$60	\$46.73	\$1.27	-3
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	\$6,376	\$0	\$63.32	\$1.72	-10
	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	\$96	\$60.65	\$1.65	-4
	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	\$60	\$38.53	\$0.98	-4
Lincoln, NE		Galveston-Houston, TX	\$3,880	\$0	\$38.53	\$0.98	0
Des Moines, IA		Amarillo, TX	\$4,320	\$47	\$43.37	\$1.10	0
Minneapolis, MN		Tacoma, WA	\$5,180	\$0	\$51.44	\$1.31	0
Council Bluffs, IA		Stockton, CA	\$5,100	\$0	\$50.65	\$1.29	2
Soybeans	Sioux Falls, SD	Tacoma, WA	\$5,850	\$0	\$58.09	\$1.58	0
	Minneapolis, MN	Portland, OR	\$5,900	\$0	\$58.59	\$1.59	0
	Fargo, ND	Tacoma, WA	\$5,750	\$0	\$57.10	\$1.55	0
	Council Bluffs, IA	New Orleans, LA	\$4,875	\$70	\$49.10	\$1.34	-3
	Toledo, OH	Huntsville, AL	\$4,945	\$0	\$49.11	\$1.34	3
	Grand Island, NE	Portland, OR	\$5,260	\$98	\$53.21	\$1.45	-13

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: December 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	\$42	\$69.01	\$1.88	-2
	KS	Guadalajara, JA	\$7,471	\$348	\$79.90	\$2.17	-4
	TX	Salinas Victoria, NL	\$4,347	\$25	\$44.67	\$1.21	-1
Corn	IA	Guadalajara, JA	\$8,902	\$280	\$93.82	\$2.38	-3
	SD	Celaya, GJ	\$8,140	\$0	\$83.17	\$2.11	0
	NE	Queretaro, QA	\$8,300	\$86	\$85.68	\$2.17	-2
	SD	Salinas Victoria, NL	\$6,905	\$0	\$70.55	\$1.79	0
	MO	Tlahpantla, EM	\$7,665	\$84	\$79.17	\$2.01	-2
	SD	Torreon, CU	\$7,690	\$0	\$78.57	\$1.99	0
Soybeans	MO	Bojay (Tula), HG	\$8,547	\$264	\$90.02	\$2.45	-2
	NE	Guadalajara, JA	\$9,157	\$271	\$96.33	\$2.62	-3
	IA	El Castillo, JA	\$9,410	\$0	\$96.15	\$2.61	-1
	KS	Torreon, CU	\$8,014	\$179	\$83.71	\$2.28	-2
Sorghum	NE	Celaya, GJ	\$7,772	\$241	\$81.88	\$2.08	-3
	KS	Queretaro, QA	\$8,108	\$52	\$83.37	\$2.12	-1
	NE	Salinas Victoria, NL	\$6,713	\$42	\$69.01	\$1.75	-1
	NE	Torreon, CU	\$7,092	\$159	\$74.09	\$1.88	-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.

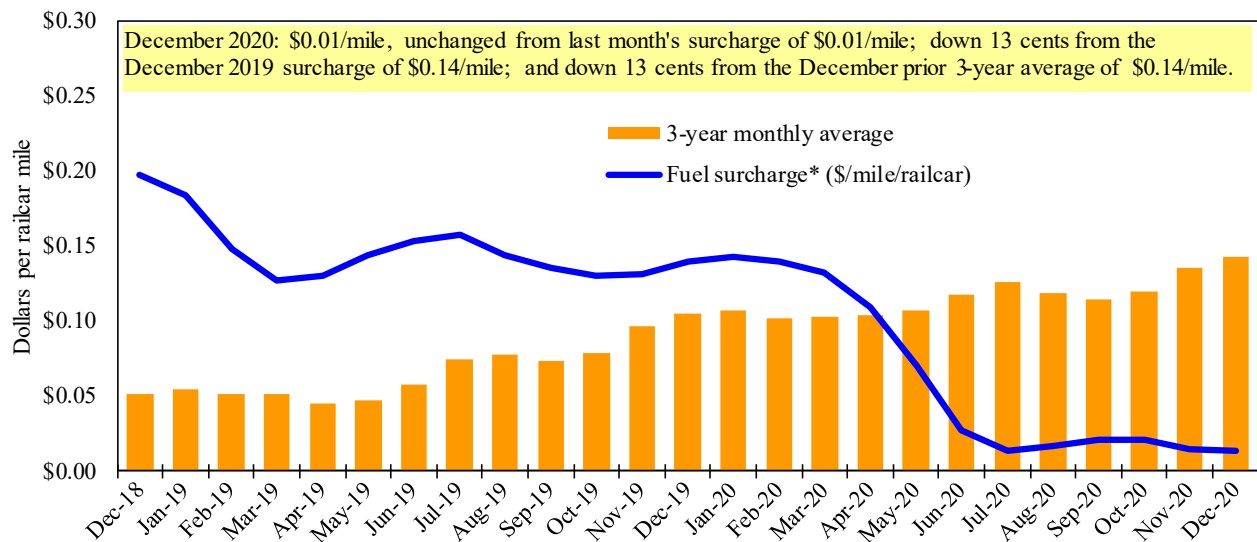
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

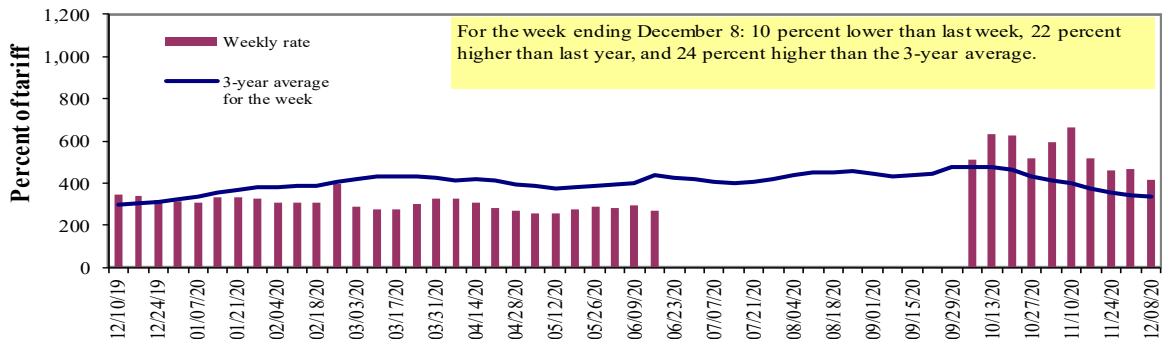
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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

Barge Transportation

Figure 8

Illinois River barge freight rate^{1,2,3}



¹Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); ²4-week moving average of the 3-year average.

³No rates data from 06/23/20 to 9/29/20 due to the lock closure for rehabilitation and replacement of lock machinery.

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	12/8/2020	-	425	417	314	415	415	289
	12/1/2020	-	431	465	373	473	473	325
\$/ton	12/8/2020	-	22.61	19.35	12.53	19.46	16.77	9.07
	12/1/2020	-	22.93	21.58	14.88	22.18	19.11	10.21
Current week % change from the same week:								
	Last year	-	-	22	29	65	65	29
	3-year avg. ²	-	24	24	27	41	43	30
Rate¹	January	-	-	419	300	377	377	278
	March	-	-	384	281	339	339	264

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.

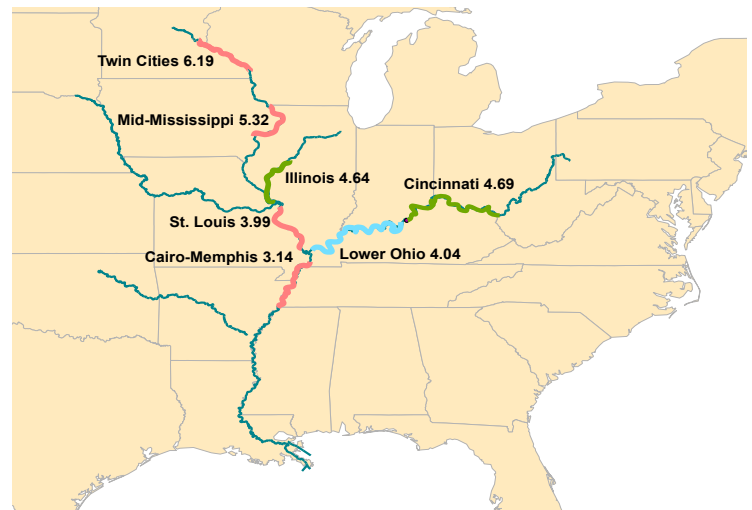
Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

$$(\text{Rate} * 1976 \text{ tariff benchmark rate per ton}) / 100$$

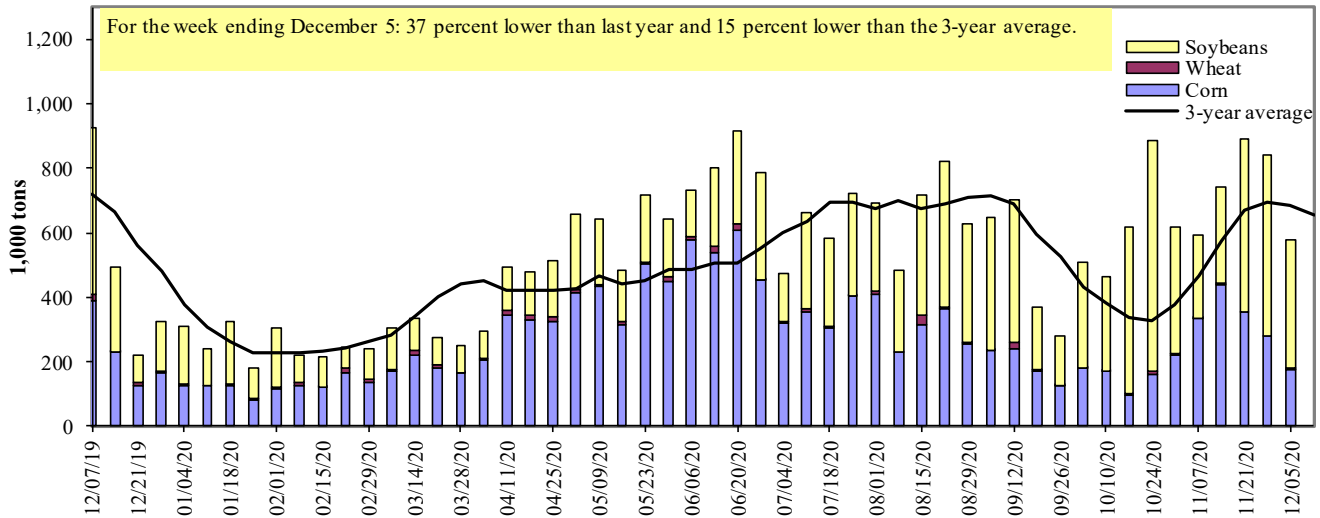
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 12/05/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	55	0	156	0	211
Winfield, MO (L25)	170	3	311	2	486
Alton, IL (L26)	158	3	417	5	583
Granite City, IL (L27)	176	3	398	5	582
Illinois River (La Grange)	30	0	136	3	169
Ohio River (Olmsted)	54	2	150	5	211
Arkansas River (L1)	3	14	15	0	32
Weekly total - 2020	233	19	563	10	825
Weekly total - 2019	420	38	646	0	1,104
2020 YTD ¹	17,226	1,708	17,036	221	36,191
2019 YTD ¹	12,093	1,562	13,669	143	27,466
2020 as % of 2019 YTD	142	109	125	155	132
Last 4 weeks as % of 2019 ²	102	54	110	352	106
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.

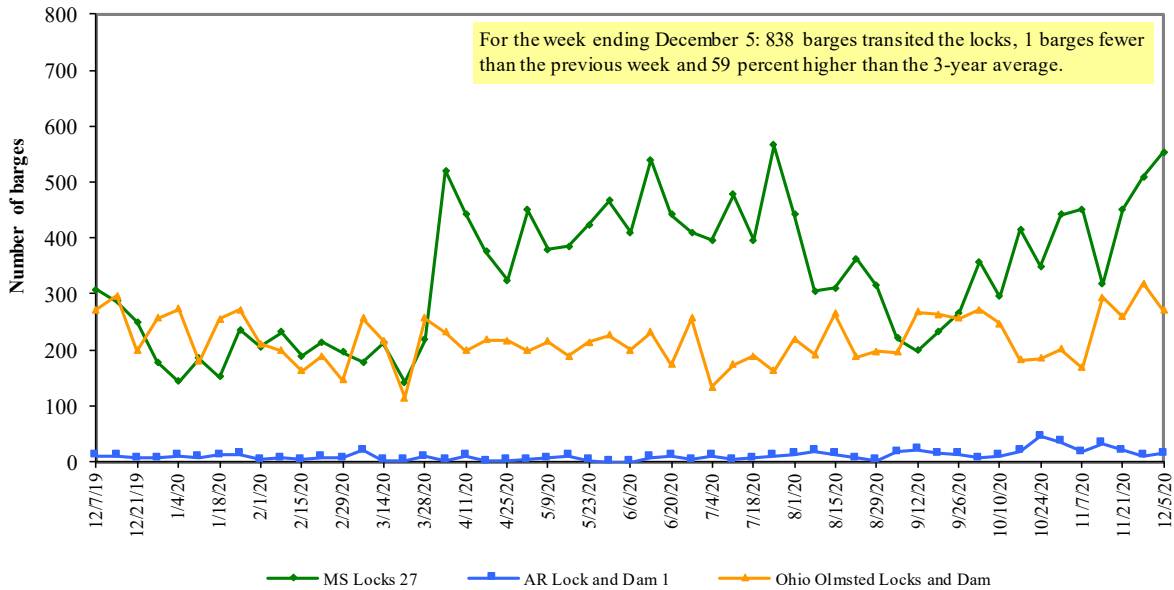
² As a percent of same period in 2019.

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

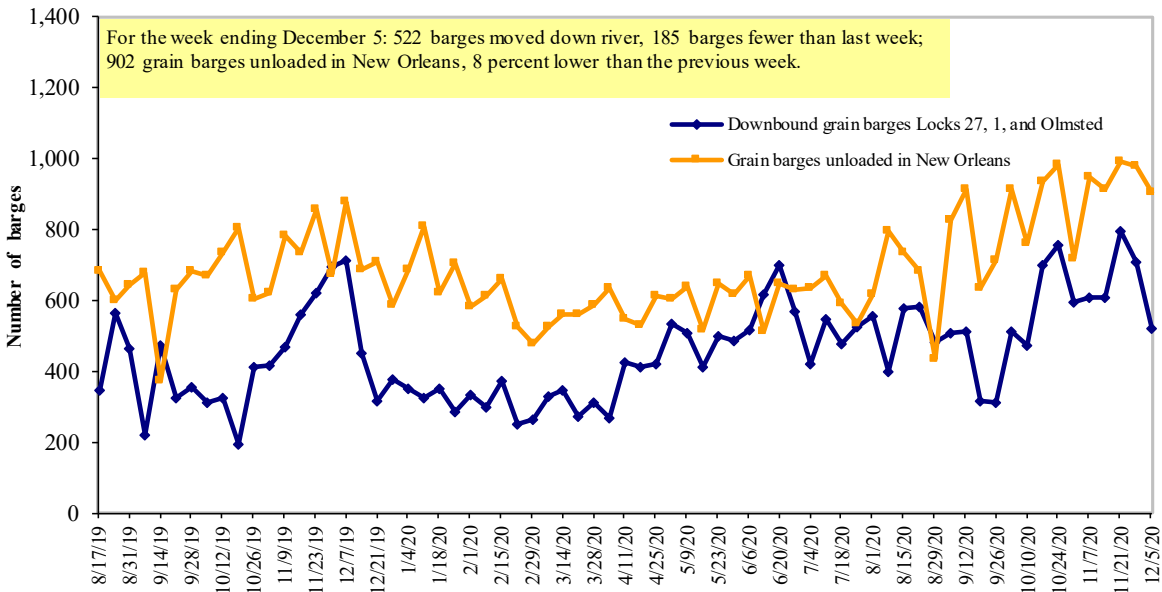
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 12/7/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.573	0.033	-0.477
	New England	2.587	0.012	-0.498
	Central Atlantic	2.779	0.036	-0.462
	Lower Atlantic	2.433	0.033	-0.481
II	Midwest	2.435	0.031	-0.531
III	Gulf Coast	2.276	0.022	-0.483
IV	Rocky Mountain	2.541	0.001	-0.666
	West Coast	3.044	0.004	-0.603
V	West Coast less California	2.724	-0.018	-0.599
	California	3.311	0.023	-0.593
Total	United States	2.526	0.024	-0.523

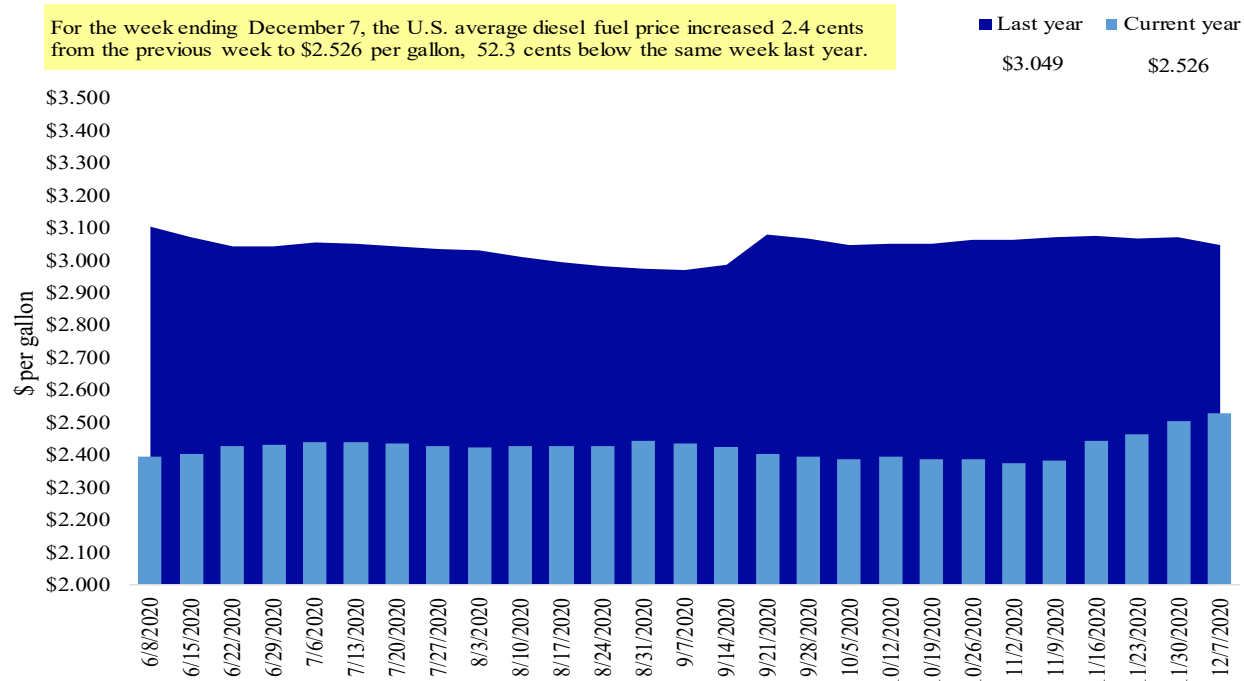
¹Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel.

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

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending December 7, the U.S. average diesel fuel price increased 2.4 cents from the previous week to \$2.526 per gallon, 52.3 cents below the same week last year.



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

Grain Exports

Table 12

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

For the week ending	Wheat					All wheat	Corn	Soybeans	Total
	HRW	SRW	HRS	SWW	DUR				
Export balances¹									
11/26/2020	1,531	394	1,521	2,503	172	6,120	27,920	25,211	59,252
This week year ago	1,319	526	1,185	869	175	4,074	8,271	9,956	22,301
Cumulative exports-marketing year²									
2020/21 YTD	4,949	1,001	3,595	2,434	393	12,372	10,373	27,126	49,871
2019/20 YTD	4,778	1,421	3,367	2,314	501	12,382	6,344	15,988	34,714
YTD 2020/21 as % of 2019/20	104	70	107	105	78	100	163	170	144
Last 4 wks. as % of same period 2019/20*	118	78	127	259	108	145	329	280	274
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 11/26/2020	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 -			
Mexico	8,534	6,862	24	14,869
Japan	4,968	2,069	140	11,221
Columbia	1,883	1,108	70	4,830
Korea	927	25	3,579	4,011
China	11,179	60	18,594	909
Top 5 importers	27,491	10,124	172	35,840
Total U.S. corn export sales	38,293	14,616	162	49,983
% of projected exports	57%	32%		
Change from prior week ²	1,372	546		
Top 5 importers' share of U.S. corn export sales	72%	69%		72%
USDA forecast November 2020	67,430	45,242	49	
Corn use for ethanol USDA forecast, November 2020	128,270	123,241	4	

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

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

³ FAS marketing year ranking reports (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 11/26/2020	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	29,669	9,605	209	19,106
Mexico	2,980	2,767	8	4,591
Egypt	1,575	1,174	34	2,980
Indonesia	974	813	20	2,360
Japan	921	960	(4)	2,288
Top 5 importers	36,118	15,320	136	31,324
Total U.S. soybean export sales	52,338	25,944	102	49,352
% of projected exports	87%	57%		
change from prior week ²	407	684		
Top 5 importers' share of U.S. soybean export sales	69%	59%		63%
USDA forecast, November 2020	59,946	45,668	131	

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 11/26/2020	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	2,386	2,461	(3)	3,213
Philippines	2,443	2,052	19	2,888
Japan	1,706	1,698	0	2,655
Nigeria	854	987	(13)	1,433
Korea	1,251	871	44	1,372
Indonesia	675	429	57	1,195
Taiwan	855	867	(1)	1,175
Thailand	555	462	20	727
Italy	491	603	(18)	622
Colombia	290	495	(42)	618
Top 10 importers	11,504	10,925	5	15,897
Total U.S. wheat export sales	18,492	16,455	12	23,821
% of projected exports	70%	63%		
change from prior week ²	446	228		
Top 10 importers' share of U.S. wheat export sales	62%	66%		67%
USDA forecast, November 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 12/03/20	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	375	358	105	14,879	13,061	114	124	127	13,961
Corn	198	135	147	9,053	6,986	130	929	146	7,047
Soybeans	779	567	137	12,109	11,346	107	128	170	11,969
Total	1,353	1,060	128	36,041	31,393	115	144	153	32,977
Mississippi Gulf									
Wheat	23	60	38	3,361	4,341	77	49	52	4,448
Corn	306	714	43	26,577	19,812	134	156	123	20,763
Soybeans	1,094	1,412	77	32,052	28,930	111	131	131	31,398
Total	1,423	2,186	65	61,990	53,082	117	133	126	56,609
Texas Gulf									
Wheat	48	39	124	4,178	5,820	72	127	84	6,009
Corn	0	0	n/a	682	608	112	111	132	640
Soybeans	107	157	69	1,609	2	n/a	n/a	n/a	2
Total	156	195	80	6,469	6,430	101	362	238	6,650
Interior									
Wheat	80	44	182	2,067	1,831	113	140	179	1,987
Corn	217	167	130	8,081	7,417	109	96	106	7,857
Soybeans	133	159	83	6,633	6,628	100	130	141	7,043
Total	429	370	116	16,781	15,876	106	113	125	16,887
Great Lakes									
Wheat	33	32	101	837	1,185	71	69	104	1,339
Corn	0	0	n/a	61	11	538	n/a	0	11
Soybeans	130	47	275	982	473	207	n/a	226	493
Total	162	80	204	1,880	1,670	113	230	164	1,844
Atlantic									
Wheat	0	30	0	65	37	175	n/a	n/a	37
Corn	0	0	n/a	33	99	33	n/a	3	99
Soybeans	113	154	74	1,520	1,296	117	310	179	1,353
Total	113	184	62	1,618	1,432	113	331	188	1,489
U.S. total from ports*									
Wheat	559	562	99	25,388	26,275	97	110	114	27,781
Corn	721	1,016	71	44,488	34,933	127	157	122	36,417
Soybeans	2,356	2,496	94	54,904	48,674	113	145	151	52,258
Total	3,636	4,075	89	124,779	109,882	114	142	138	116,457

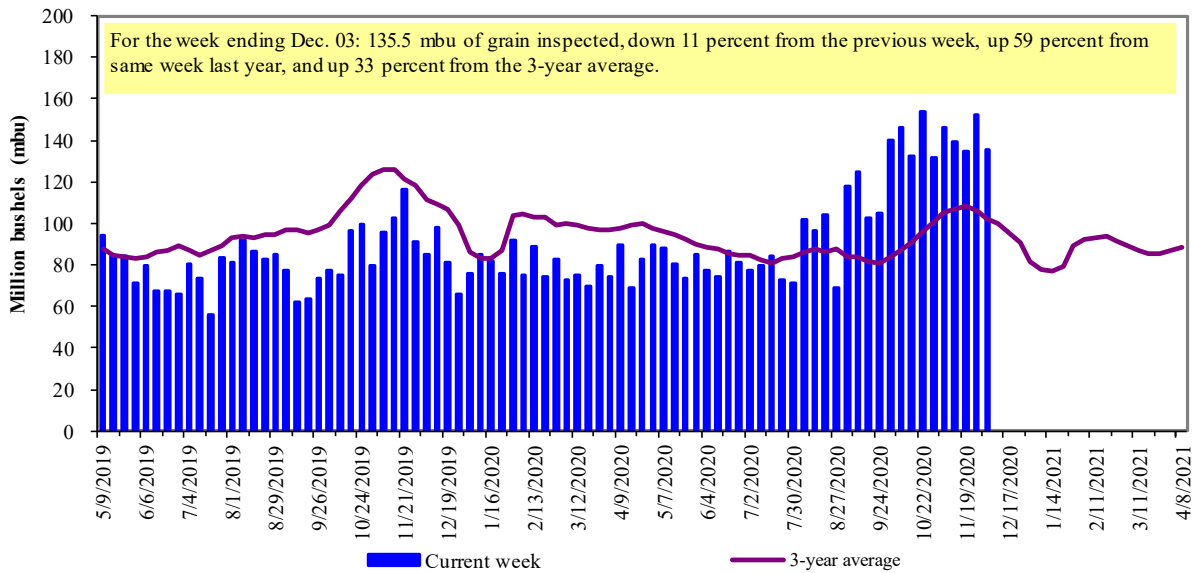
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

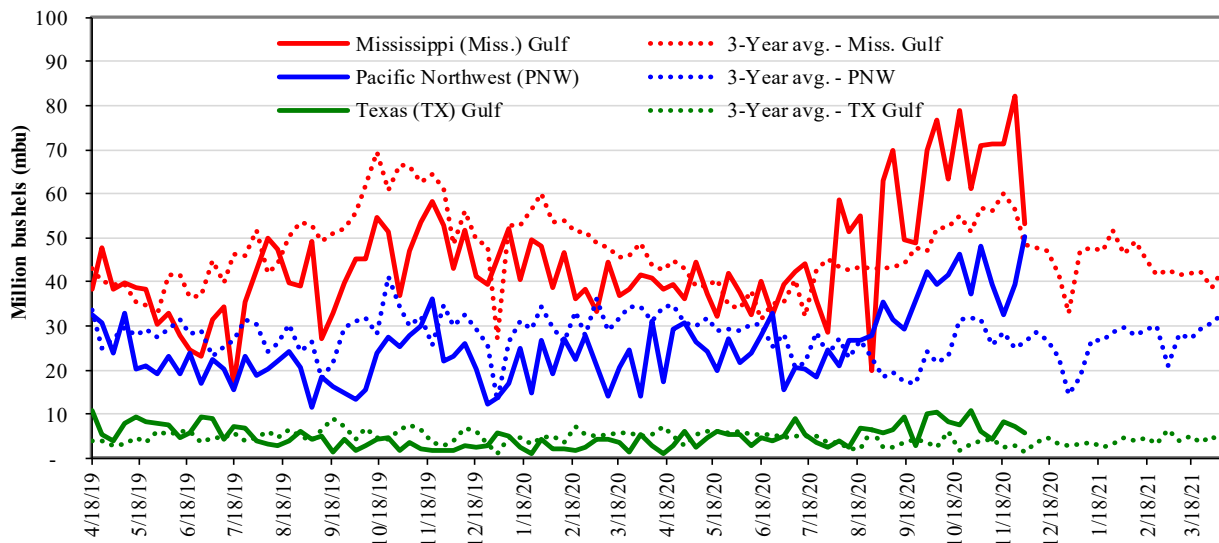


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 12/03/20 inspections (mbu):		Percent change from:			
MS Gulf:	53.1	Last wk:	down 35	down 20	down 34
PNW:	50.2	Last Year (same wk):	up 23	up 253	up 32
TX Gulf:	5.7	3-yr avg. (4-wk. mov. Avg):	down 4	up 115	up 1
				up 1	up 90

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

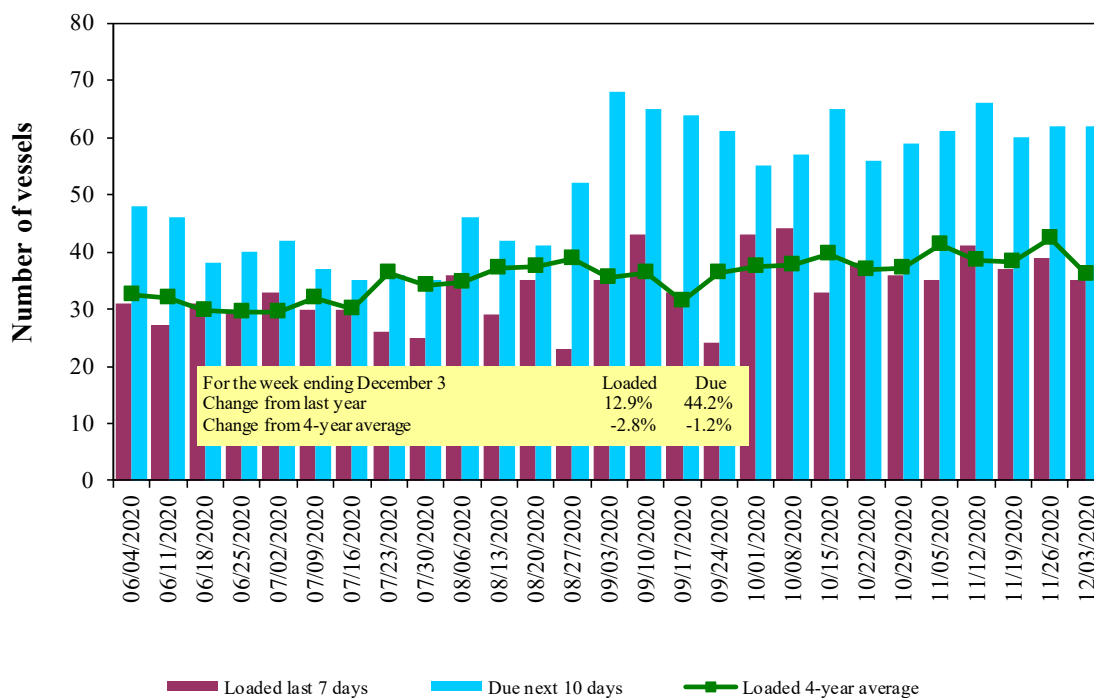
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
12/3/2020	58	35	62	18
11/26/2020	58	39	62	n/a
2019 range	(26...61)	(18...44)	(33...69)	(8...33)
2019 average	40	31	49	17

Note: n/a = not available due to holiday.

Figure 16

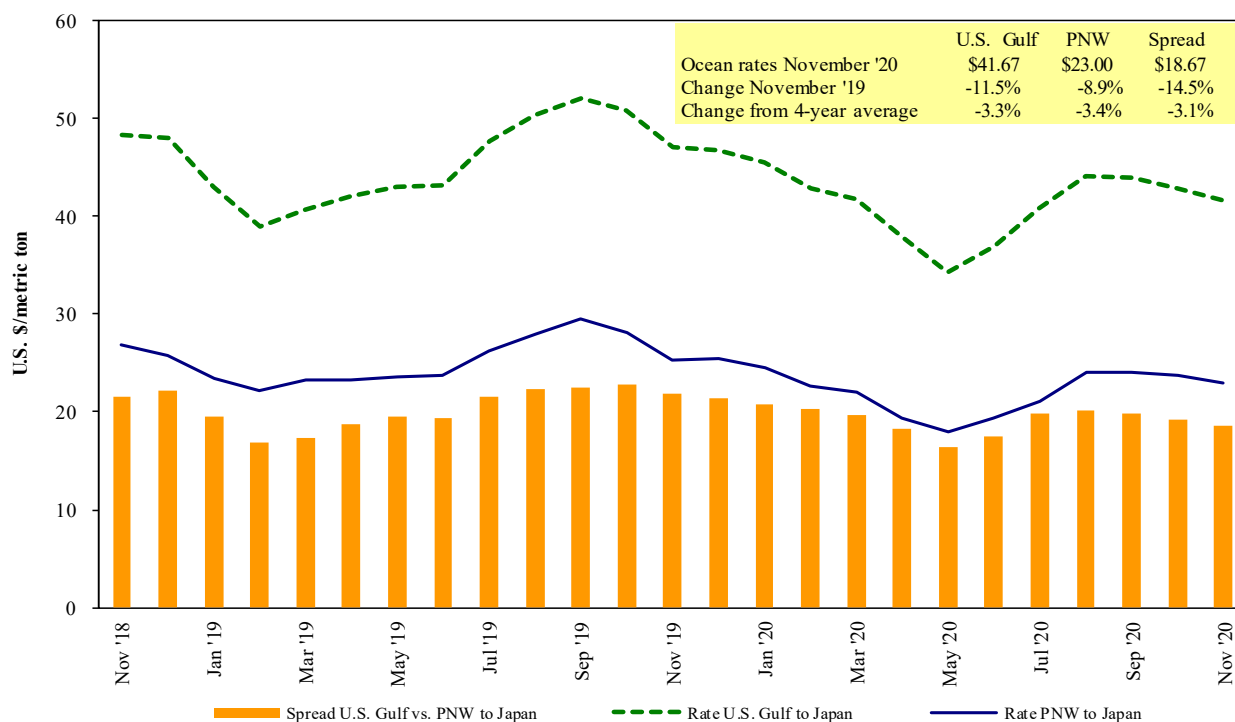
U.S. Gulf¹ vessel loading activity



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 12/05/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Dec 6/11	66,000	39.25
U.S. Gulf	China	Heavy grain	Nov 20/30	65,000	37.25
U.S. Gulf	China	Heavy grain	Oct 16/25	66,000	41.75
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	Cameroon	Sorghum	Oct 10/20	8,580	68.50*
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	Indonesia	Soybean Meal	Nov 10/20	8,600	37.86*
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.

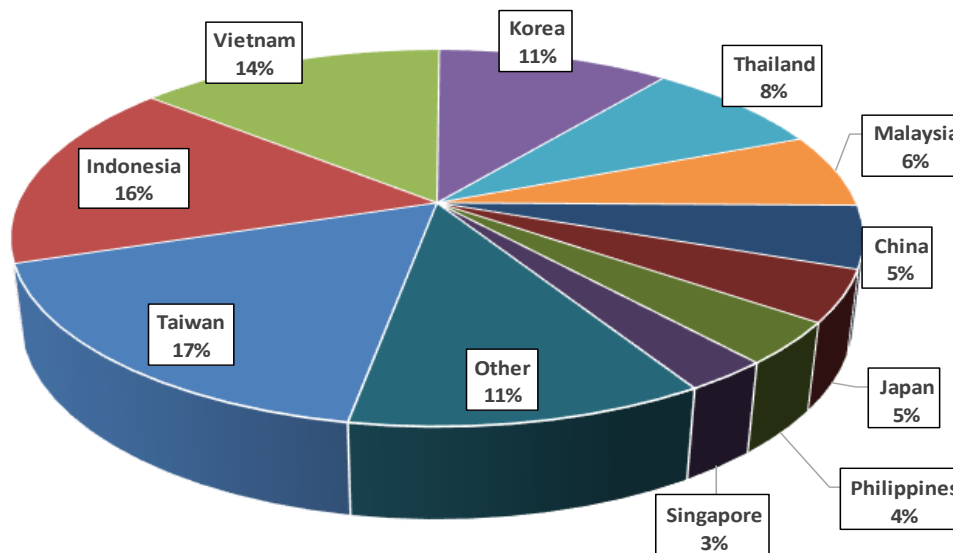
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

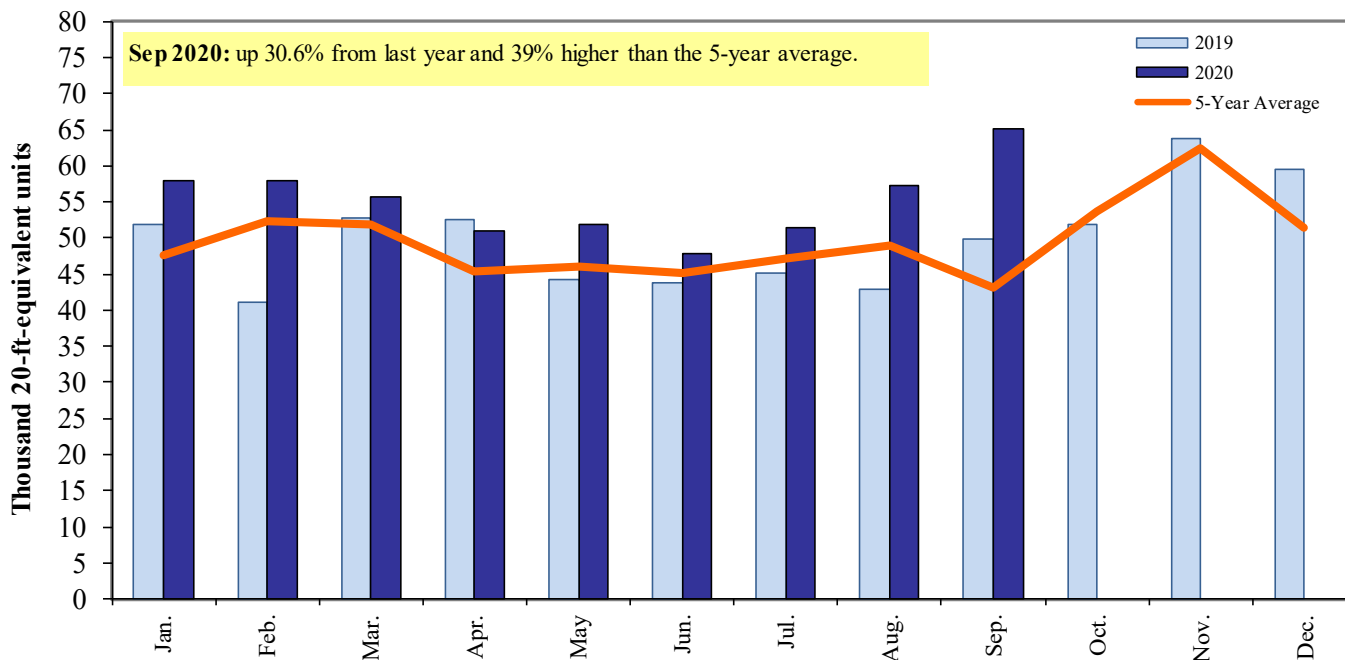
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



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

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

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