



Grain Transportation Report

A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

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December 17, 2020

WEEKLY HIGHLIGHTS

Grain Inspections Continue To Fall, but Rail Deliveries Remain Strong

For the week ending December 10, **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 10 percent from the previous week, up 37 percent from last year, and up 34 percent from the 3-year average. Inspections of wheat dropped notably from the previous week as shipments to Asia and Latin America decreased. Soybean inspections decreased 8 percent from week to week, but inspections of corn increased 18 percent, as shipments to Asia increased significantly. Pacific Northwest (PNW) grain inspections decreased 31 percent from the previous week, while Mississippi Gulf inspections increased 15 percent. Despite the drop in grain inspections, total rail deliveries of grain to U.S. ports remained strong; increasing 122 percent from last year and increasing 64 percent from the 3-year average in the last 4 weeks.

ATRI Releases 2020 Operational Costs of Trucking

The American Transportation Research Institute (ATRI) recently released a [study](#) analyzing detailed trucking costs from 2008 to 2019. According to the study, from 2018 to 2019, the average marginal cost per mile incurred by motor carriers decreased 9.3 percent to \$1.65. Still, that average was 6 cents higher than in 2016, the last time the freight market softened. Costs in most other categories also decreased. From 2018 to 2019, combined driver wage and benefits decreased from 77.6 cents per mile to 69.3 cents per mile. Although total driver compensation declined, bonuses, particularly retention bonuses, increased by over 80 percent because of a driver shortage. Accurate operational cost data are key to public agencies' decisions to fund roadway projects, and the efficient movement of freight and commodities, including grain, depend on these projects.

FHWA Proposes To Allow States More Flexibility With Design Standards

The Federal Highway Administration (FHWA) published a [notice of proposed rulemaking](#) to give States more flexibility in setting design standards for highway projects. These include resurfacing, restoration, and rehabilitation projects on all National Highway System (NHS) roadways, including interstates. The new regulation will let States follow the updated standards of the American Association of State Highway and Transportation Officials, among others, without requiring an FHWA exception. The streamlining measure will allow States to quickly repair highways and interstates needing immediate attention. Roughly 60 percent of U.S. grain is transported by truck (according to USDA's Agricultural Marketing Service), and well-functioning roadways are essential to sustaining low transportation costs and the competitiveness of U.S. grain. Comments can be submitted until December 24.

Snapshots by Sector

Export Sales

For the week ending December 3, **unshipped balances** of wheat, corn, and soybeans totaled 57.8 million metric tons (mmt). This was 2 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 1.362 mmt, down 1 percent from the past week. Net **soybean export sales** were 0.569 mmt, up 40 percent from the previous week. Net **wheat export sales** were 0.617 mmt, up 38 percent from the previous week.

Rail

U.S. Class I railroads originated 27,950 **grain carloads** during the week ending December 5. This was an 11-percent increase from the previous week, 21 percent more than last year, and 16 percent more than the 3-year average.

Average December shuttle **secondary railcar** bids/offers (per car) were \$299 above tariff for the week ending December 10. This was \$257 more than last week and \$730 more than this week last year. There were no non-shuttle bids/offers this week.

Barge

For the week ending December 12, **barge grain movements** totaled 1,120,459 tons. This was 36 percent more than the previous week and 58 percent more than the same period last year.

For the week ending December 12, 703 grain barges **moved down river**—181 barges more than the previous week. There were 1,022 grain barges **unloaded in New Orleans**, 13 percent higher than the previous week.

Ocean

For the week ending December 10, 45 **oceangoing grain vessels** were loaded in the Gulf—41 percent more than the same period last year. Within the next 10 days (starting December 11), 66 vessels were expected to be loaded—50 percent more than the same period last year.

As of December 10, 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 December 3. The rate from PNW to Japan was \$23.25 per mt, unchanged from the last available rate on December 3.

Fuel

For the week ending December 14, the U.S. average **diesel fuel price** increased 3.3 cents from the previous week to \$2.559 per gallon, 48.7 cents below the same week last year.

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Grain Transportation Update

Grain movements have been a relative bright spot for freight in a year of significant supply-chain and market challenges. According to a [Department of Transportation index](#), freight volume was lower for every month of 2020 (through October 2020, the latest available) than in the same month of 2019. However, following sizable harvests of 14.5 billion bushels (bbu) of corn and 4.2 bbu of soybeans and robust export demand, grain shipments by rail, barge, and ocean have all been strong. All are above last year's levels year to date (YTD), with rail and barge both reaching historically high levels.

Few Signs of Grain Harvest Rail Service Issues Amid Record Rail Volumes

After starting the year slowly, grain rail carloadings accelerated significantly in the last few months. YTD grain carloadings through September were 5 percent below the prior 3-year average. However, during harvest, grain carloads have been historically high ([GTR fig. 3](#)). Considering only the period from the start of September to mid-December, 2020 grain carloadings were 22 percent above last year, and 5 percent above 2016 (the peak of the past 10 years).

Despite the high volumes this year, the Surface Transportation Board's (STB) [rail service metrics](#) did not reflect severe service disruptions, but did show some signs of slowing. Grain train speeds declined between May and August. Similarly, by the end of the summer, grain train origin dwell times, numbers of grain trains held short of their final destination, and numbers of grain cars not moved in over 48 hours had all increased modestly, compared to earlier in the year. These increases likely reflected higher grain traffic, as well as higher total traffic. However, each metric remained on par with or below recent years.

Also reflecting high grain rail volumes, average secondary auction market bids for guaranteed rail service (which is paid in addition to the tariff rail rate) peaked in late September at \$1,529 per car for service in October. Average bids have fallen since their peak but remain high relative to recent years ([GTR fig. 4](#)). Although the elevated bids reflect the strong demand and high volumes of grain rail transportation, the bids are far lower than those recorded in years of significant service issues (e.g., 2014).

High Movements and Rates Reflected a Busy Quarter for Barged Grain

So far, fourth-quarter volumes have surpassed 1 million tons for 5 weeks in 2020, compared to only 1 week in 2019 and none in 2018. As of December 12, YTD barge grain shipments were 37.3 million tons, 32 percent higher than the same time in 2019 ([GTR table 10](#)).

High grain volumes by barge in 2020 are explained both by unusually high demand from the international export market and by an unusually swift harvest this year. From early November to early December, U.S. total grain inspections have been 42 percent higher than the same time last year and 38 percent above the 3-year average ([December 10, 2020, GTR](#)). The result of this high export demand is a high demand for barges to move corn and soybeans down the Mississippi River to the Gulf ports. Additionally, favorable weather in the Upper and Mid-Mississippi River areas for most of the first half of this quarter allowed a speedy harvest. The quick harvest created a push for shippers to move the crops to the river ports. Reflecting both the swift harvest and high demand for exports, barge movements signal a bullish market in fourth quarter 2020.

Similar to their effect on barge movements, the surging demand for exports and quick harvest also contributed to higher rates in the first half of the quarter. Weekly barge rates in fourth quarter 2020 have trended higher than in previous years. For the week ending December 15, the average weekly Illinois River rate was \$24.60/per ton (adjusted by the Producer Price Index), 43 percent higher than last year and 34 percent higher than the 3-year average for the same quarter. However, spot barge rates in the second half of the quarter have reflected the industry's struggle to adjust the logistics on the Lower Mississippi River and parts of the Illinois River. The industry has reported delays in both upbound and downbound traffic, as positioning empty barges to fulfill the requests became an ongoing challenge due to weather and water condition. Despite the continuously high demand for exports in the second half of the quarter, spot rates began trending downward in mid-November following the long-term pattern. As shippers and the barge industry waited for logistical conditions to improve, the drop in bids for the spot market also pushed the rates down.

Dry-Bulk Freight Rates Slow Through Fourth Quarter

Strong ocean freight demand for bulk grain shipments pushed rates up in June, July, and August reaching \$44.13 for shipments from the U.S. Gulf to Japan. In September, rates began a downward turn, falling less than 1 percent, then falling another 2.4 percent in October and another 2.9 percent in November ([GTR fig. 17](#)). The number of loaded grain vessels in the major U.S. Gulf port regions has exceeded the 4-year average since the last week of September.

Compared to last year, YTD ocean vessel loads in the Gulf are 6 percent higher. The bulk ocean market is expected to be relatively slow through the end of the year.

Diesel Fuel Prices Grow as the End of the Year Approaches

The petroleum supply chain has been significantly impacted this year. Sharp declines in fuel demand in 2020 caused inventories of petroleum products to reach near record-high levels and pushed prices to unexpected lows. In 2020, the average U.S. On-Highway Diesel Fuel Price peaked during the first week of the year at \$3.08 per gallon, then fell precipitously to \$2.39 in mid-May. Prices averaged \$2.41 per gallon through the summer and into late fall. However, U.S. average diesel fuel prices increased nearly 18 cents per gallon in the 6 weeks ending December 14, 2020. The price increase, at least partly, reflected a rising demand for shipping services in the peak holiday season and a drop in distillate production and inventories. The Department of Energy’s most recent [Short-Term Energy Outlook](#) forecasts average crude oil prices will rise in the first quarter of 2021. The anticipated price increase is in response to reports that major oil-producing countries plan to limit their previously planned production increases in January 2021.

Outlook for the Rest of 2020/21

According to the December [WASDE](#), total exports of the three major grains are expected to reach 5.8 million bushels in marketing year (MY) 2020/21, up 32 percent from MY 2019/20 (see table). Production of corn is expected to increase by 7 percent from MY 2019/20, to 14.5 million bushels. Soybean production is projected to increase by 17 percent from MY 2019/20, to 4.2 million bushels. Wheat production is expected to decrease by 5 percent from 2019/20, to 1.8 million bushels.

Currently, export sales commitments of corn are more than double the same time last year because of increased demand

from China. Domestic prices of corn in China are the highest since 2015, causing China to import more corn and corn substitutes to meet its rising demand for feed. Total soybean export commitments are 96 percent above last year, also driven by Chinese demand and strong soybean export prices—the highest since 2014. YTD total wheat commitments for MY 2020/21 are up 13 percent from 2019/20 ([GTR, tables 13-15](#)). Demand for U.S. wheat has remained strong, owing to strong domestic prices for wheat and corn in China. As a result, the MY 2020/21 wheat import forecast for China is the largest in 25 years. YTD U.S. wheat total export commitments to China are more than 10 times those of the same period last year.

In MY 2020/21, U.S. corn exports are projected to increase 49 percent from MY 2019/20, while soybean and wheat exports are expected to increase by 31 percent and 2 percent, respectively (see table). U.S. transportation demand for grain in the months ahead is expected to increase in response to the strong export demand.

[The GTR Team](#)

Table 1. Major grains: production and use, December 2020, million bushels					
	Corn	Soybeans	Wheat	Total	Y/Y
United States 2020/21 (Projected)					
Production	14,507	4,170	1,826	20,503	7.3%
Exports	2,650	2,200	985	5,835	32.0%
Domestic use	12,175	2,334	1,127	15,636	0.8%
Ending stocks	1,702	175	862		
Total use	14,825	4,534	2,112		
Stocks/use	11.5%	3.9%	40.8%		
United States 2019/20 (Estimated)					
Production	13,620	3,552	1,932	19,104	-7.5%
Exports	1,778	1,676	965	4,419	-7.1%
Domestic use	12,109	2,277	1,123	15,509	-0.2%
Ending stocks	1,995	523	1,028		
Total use	13,887	3,953	2,089		
Stocks/use	14.4%	13.2%	49.2%		
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, December 2020

Grain Transportation Indicators

Table 1

Grain transport cost indicators¹

For the week ending	Truck	Rail		Barge	Ocean	
		Unit train	Shuttle		Gulf	Pacific
12/16/20	172	288	233	239	186	165
12/09/20	170	288	222	232	186	165

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)

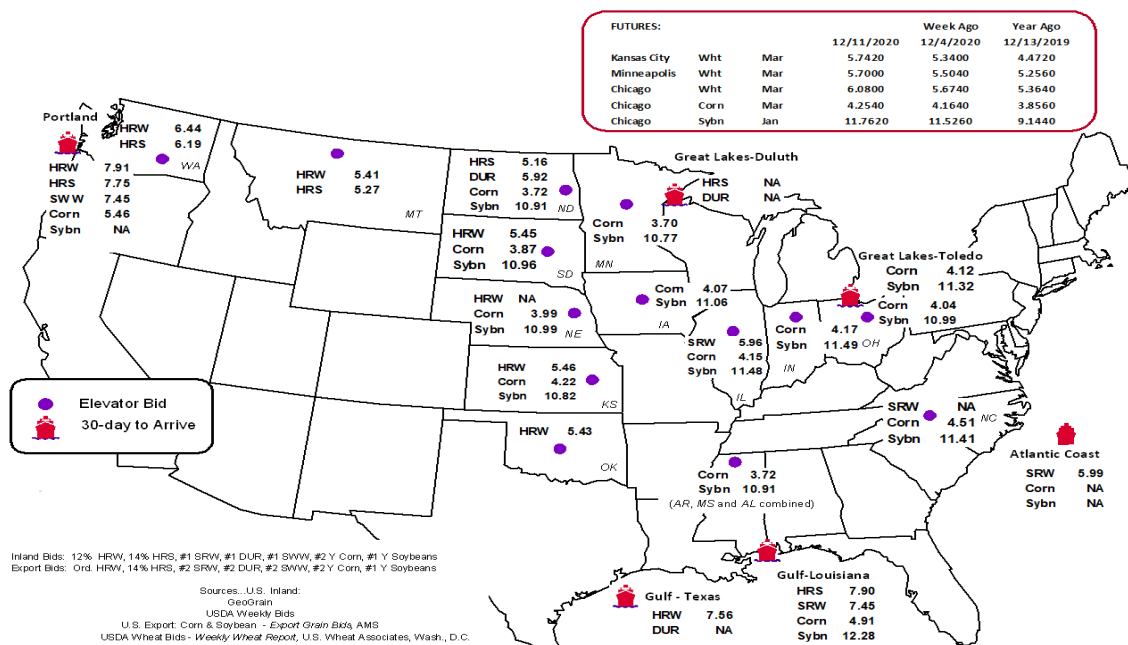
Commodity	Origin-destination	12/11/2020	12/4/2020
Corn	IL-Gulf	-0.76	-0.74
Corn	NE-Gulf	-0.92	-0.91
Soybean	IA-Gulf	-1.22	-1.25
HRW	KS-Gulf	-2.10	-2.11
HRS	ND-Portland	-2.59	-2.53

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			
12/9/2020 ^p	2,364	2,081	7,801	1,108	13,354	12/5/2020	2,275
12/02/2020 ^r	1,283	2,100	8,242	932	12,557	11/28/2020	3,125
2020 YTD ^r	40,587	58,986	276,243	21,582	397,398	2020 YTD	119,661
2019 YTD ^r	40,099	49,593	239,061	15,668	343,771	2019 YTD	121,750
2020 YTD as % of 2019 YTD	101	119	116	138	116	% change YTD	98
Last 4 weeks as % of 2019 ²	379	393	168	969	222	Last 4wks. % 2019	92
Last 4 weeks as % of 4-year avg. ²	377	200	134	208	164	Last 4wks. % 4 yr.	102
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.

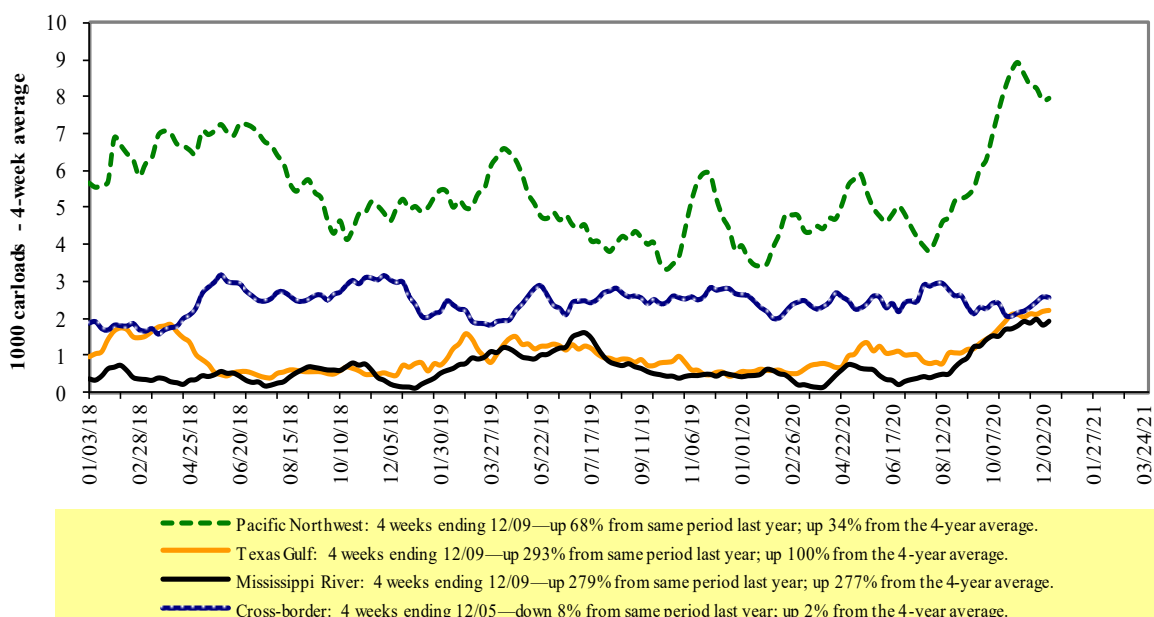
YTD = year-to-date; p = preliminary data; r = revised data; n/a = not available; wks. = weeks; avg. = average.

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: 12/5/2020	East		West			U.S. total	Canada	
	CSXT	NS	BNSF	KCS	UP		CN	CP
This week	2,288	3,428	13,061	1,229	7,944	27,950	6,429	6,005
This week last year	1,609	2,852	12,452	1,276	5,004	23,193	5,398	5,464
2020 YTD	84,132	121,328	560,343	53,813	270,276	1,089,892	219,497	239,134
2019 YTD	87,276	130,397	537,411	55,747	246,992	1,057,823	200,173	222,657
2020 YTD as % of 2019 YTD	96	93	104	97	109	103	110	107
Last 4 weeks as % of 2019*	154	115	112	105	144	122	143	117
Last 4 weeks as % of 3-yr. avg.**	134	112	113	120	140	121	138	120
Total 2019	91,611	136,872	568,369	58,527	260,269	1,115,648	212,340	235,892

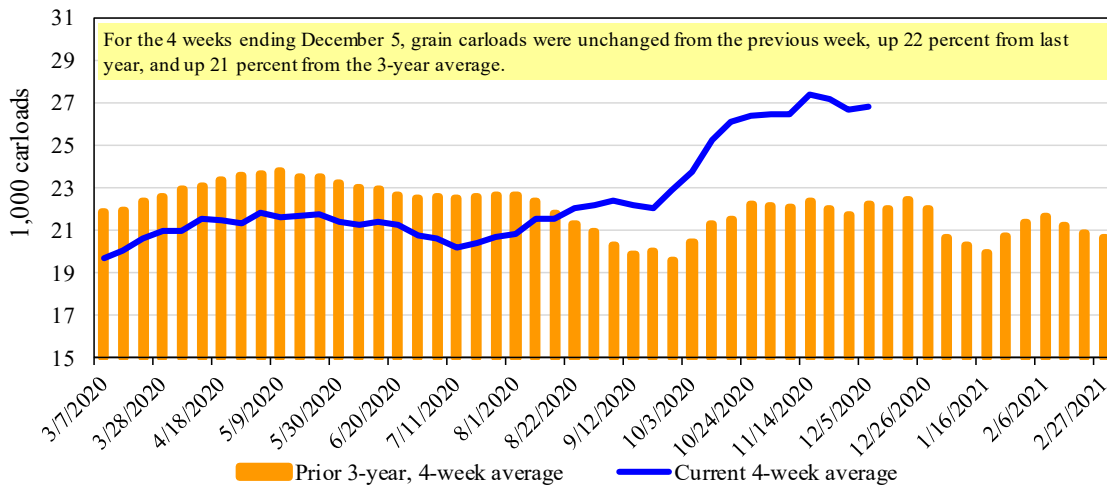
*The past 4 weeks of this year as a percent of the same 4 weeks last year.

**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: 12/10/2020		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	no offer	0	0	0	no bid	0	no bid
	COT grain single-car	no bids	no offer	215	0	199	0	143	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 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.

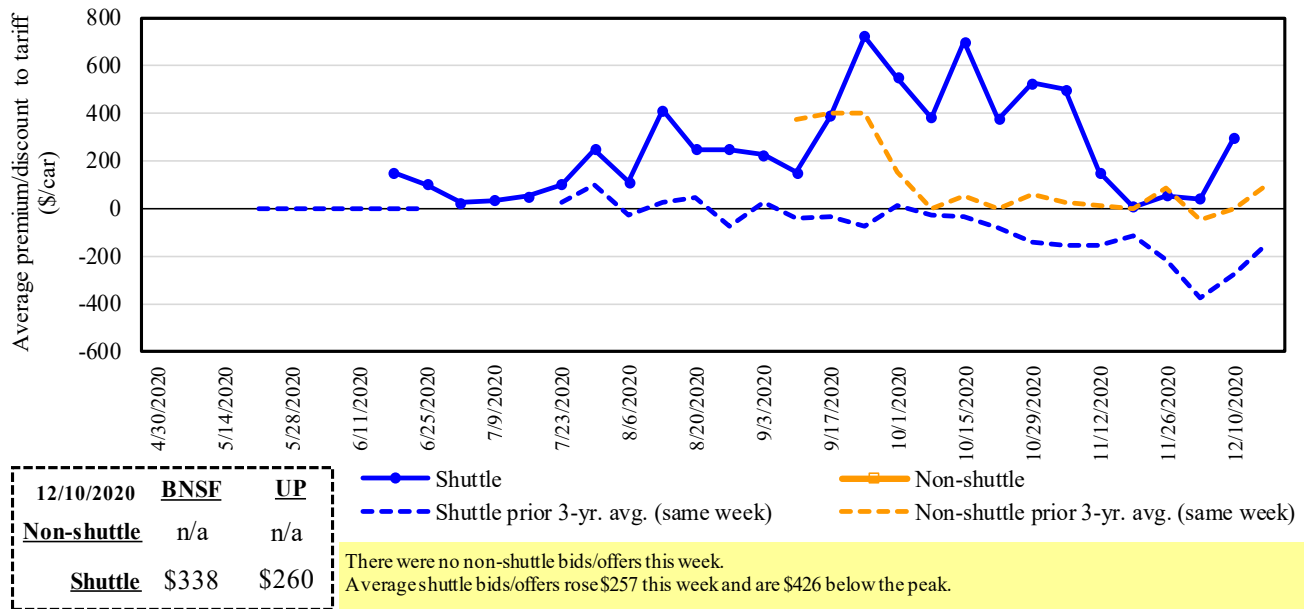
Region 1 includes: AR, IL, LA, MO, NM, OK, TX, WI, and Duluth, MN.

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

Source: USDA, Agricultural Marketing Service.

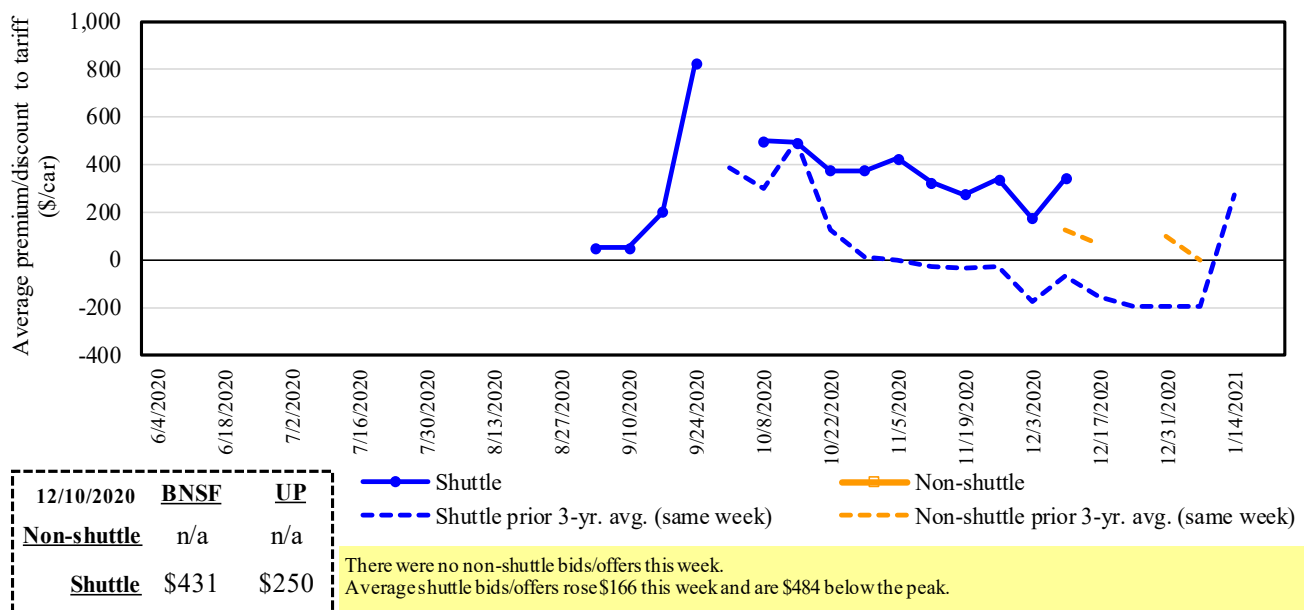
The **secondary rail market** information reflects trade values for service that was originally purchased from the railroad carrier as some form of guaranteed freight. The **auction and secondary rail** values are indicators of rail service quality and demand/supply.

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

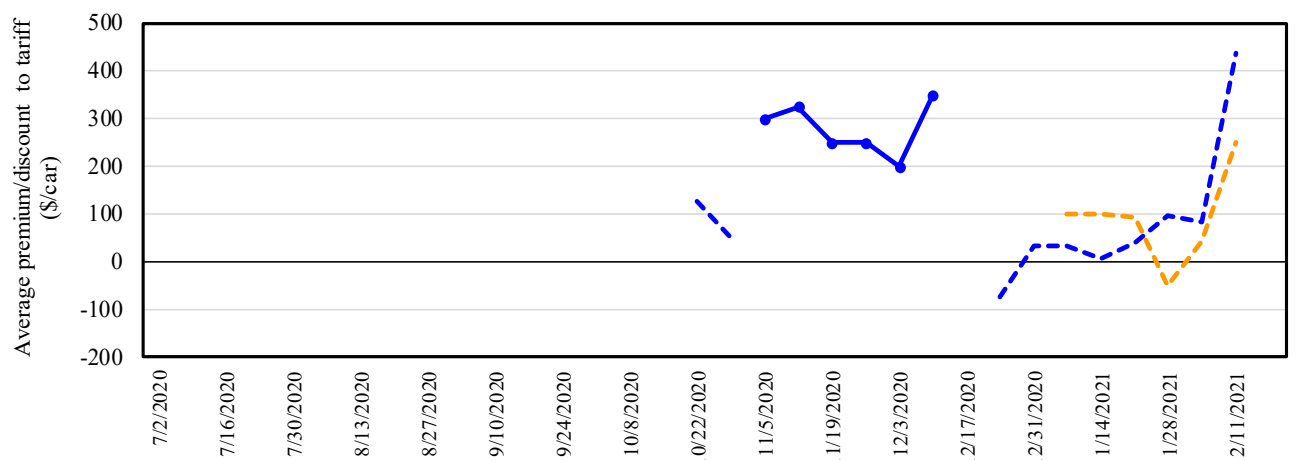
Figure 5
Bids/offers for railcars to be delivered in January 2021, secondary market



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



12/10/2020	BNSF	UP	Shuttle	Non-shuttle
Non-shuttle	n/a	n/a	Shuttle prior 3-yr. avg. (same week)	Non-shuttle prior 3-yr. avg. (same week)
Shuttle	\$500	\$200	There were no non-shuttle bids/offers this week. Average shuttle bids/offers rose \$150 this week and are at the peak.	

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

Table 6

Weekly secondary railcar market (\$/car)¹

For the week ending: 12/10/2020		Delivery period					
		Dec-20	Jan-21	Feb-21	Mar-21	Apr-21	May-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	338	431	500	306	0	(44)
	Change from last week	355	n/a	n/a	n/a	n/a	n/a
	Change from same week 2019	700	681	n/a	n/a	n/a	n/a
	UP-Pool	260	250	200	200	(50)	n/a
	Change from last week	160	75	0	100	n/a	n/a
Change from same week 2019	760	450	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
Corn	Amarillo, TX	Los Angeles, CA	\$5,121	\$81	\$51.66	\$1.41	-4
	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
Soybeans	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
	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	0
	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
Soybeans	Council Bluffs, IA	Stockton, CA	\$5,100	\$0	\$50.65	\$1.29	2
	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.

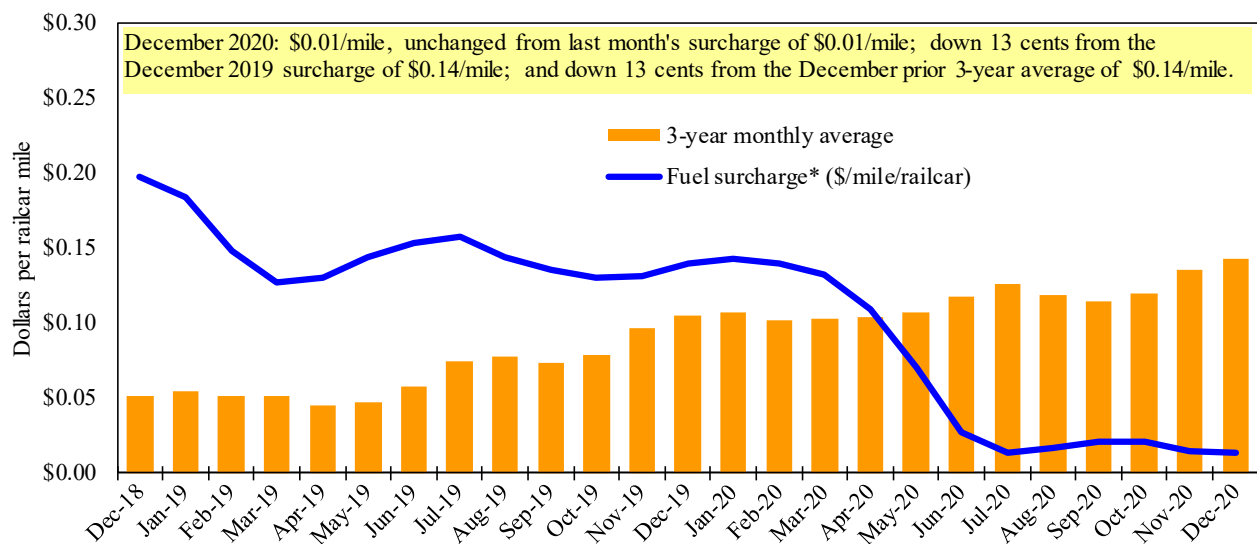
²Fuel surcharge adjusted to reflect the change in Ferrocarril Mexicano, S.A. de C.V railroad fuel surcharge policy as of 10/01/2009.

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.

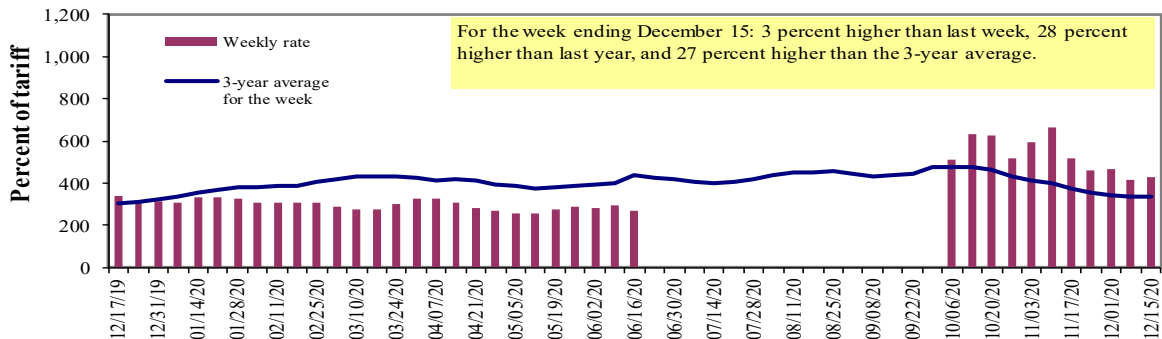
**CSX strike price changed from \$2.00/gal. to \$3.75/gal. starting January 1, 2015.

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	12/15/2020	-	-	431	301	405	405	299
	12/8/2020	-	425	417	314	415	415	289
\$/ton	12/15/2020	-	-	20.00	12.01	18.99	16.36	9.39
	12/8/2020	-	22.61	19.35	12.53	19.46	16.77	9.07
Current week % change from the same week:								
	Last year	-	-	28	28	67	67	37
	3-year avg. ²	-	-	27	23	37	39	37
Rate¹	January	-	-	417	292	372	372	268
	March	-	-	383	272	338	338	252

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.

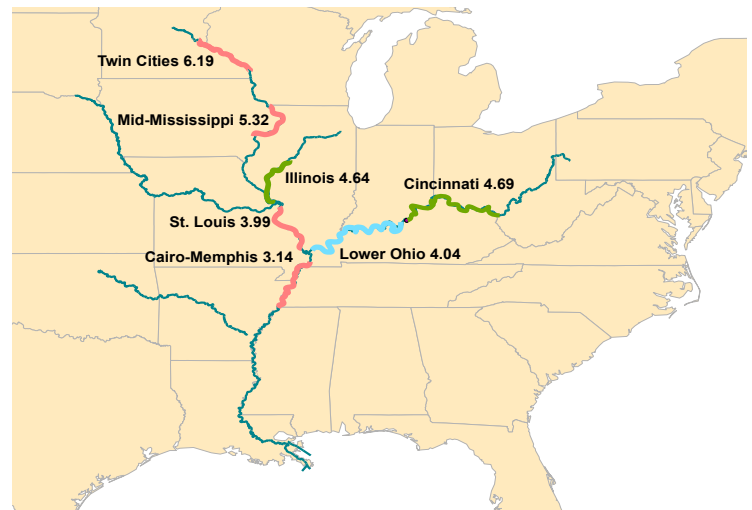
Figure 9

Benchmark tariff rates

Calculating barge rate per ton:

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

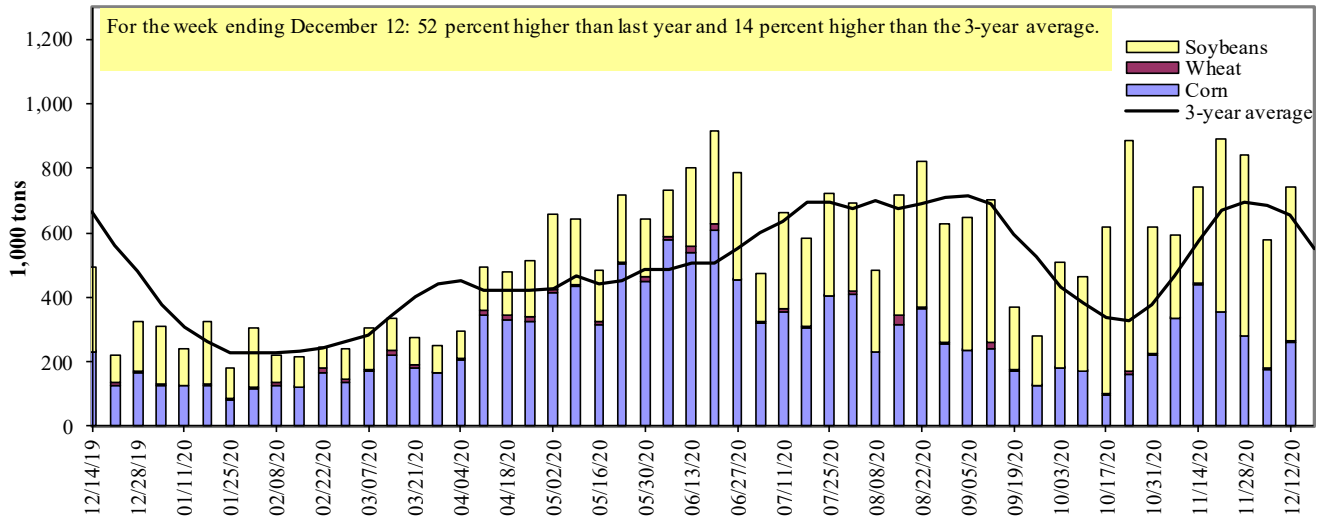
Select applicable index from market quotes are included in tables on this page. The 1976 benchmark rates per ton are provided in map.



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 12/12/2020	Corn	Wheat	Soybeans	Other	Total
Mississippi River					
Rock Island, IL (L15)	15	0	21	0	36
Winfield, MO (L25)	100	0	239	0	339
Alton, IL (L26)	251	6	448	0	706
Granite City, IL (L27)	261	6	477	0	744
Illinois River (La Grange)	150	6	220	0	376
Ohio River (Olmsted)	115	9	207	2	332
Arkansas River (L1)	0	6	39	0	44
Weekly total - 2020	376	21	722	2	1,120
Weekly total - 2019	288	9	412	0	709
2020 YTD ¹	17,602	1,729	17,758	223	37,311
2019 YTD ¹	12,381	1,571	14,080	143	28,175
2020 as % of 2019 YTD	142	110	126	156	132
Last 4 weeks as % of 2019 ²	96	67	128	1,252	115
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.

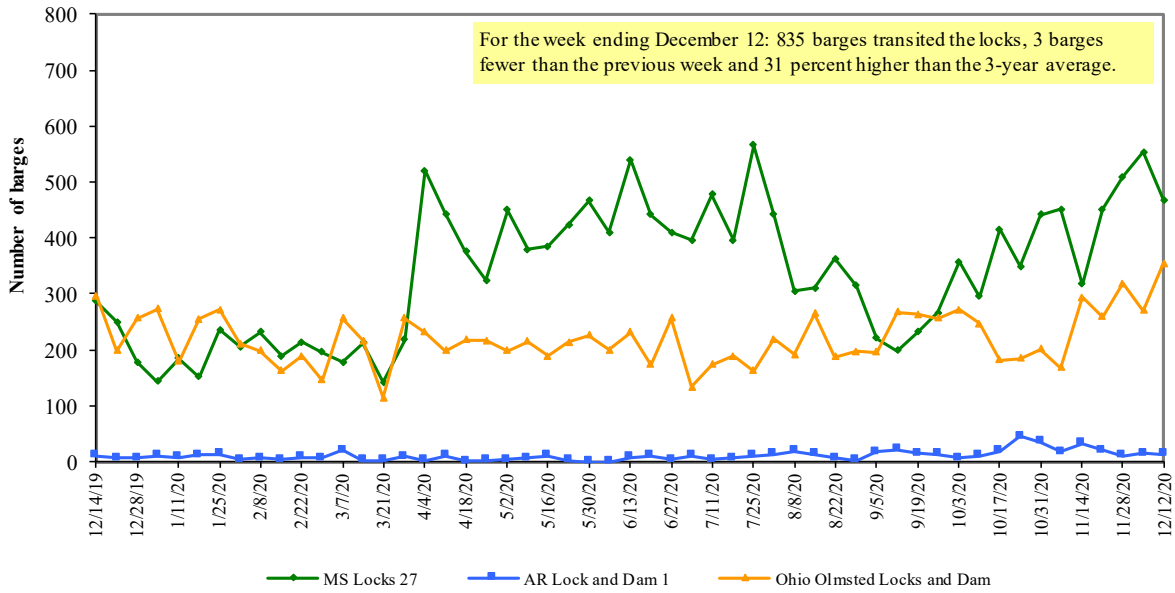
² As a percent of same period in 2019.

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

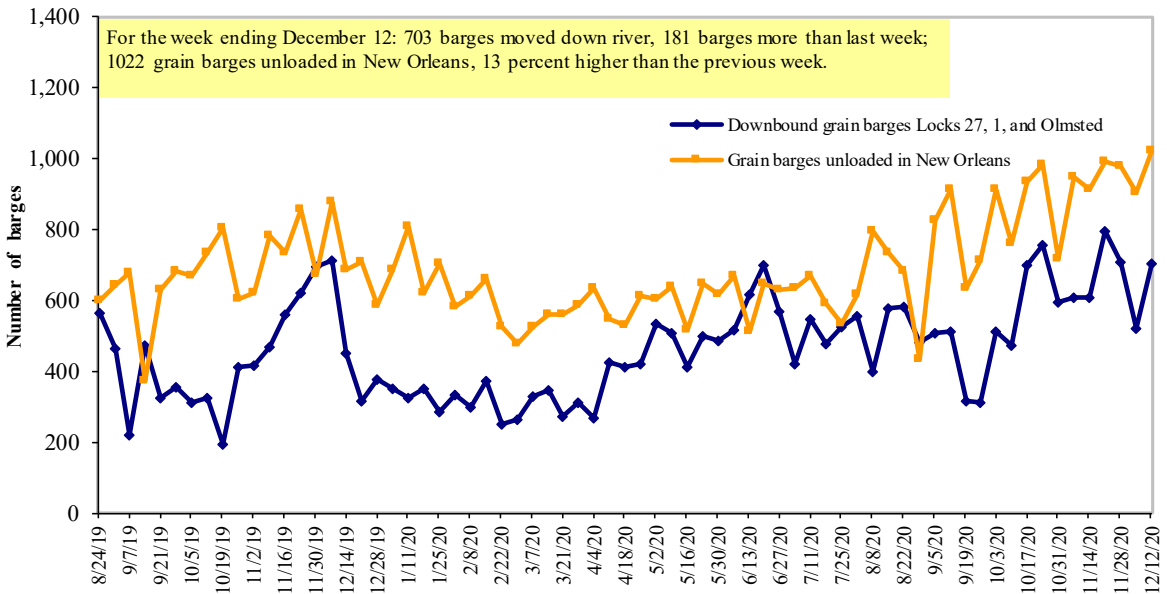
Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



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 12/14/2020 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	2.603	0.030	-0.450
	New England	2.607	0.020	-0.476
	Central Atlantic	2.802	0.023	-0.437
	Lower Atlantic	2.471	0.038	-0.450
II	Midwest	2.478	0.043	-0.492
III	Gulf Coast	2.307	0.031	-0.456
IV	Rocky Mountain	2.556	0.015	-0.605
	West Coast	3.073	0.029	-0.543
V	West Coast less California	2.751	0.027	-0.529
	California	3.342	0.031	-0.540
Total	United States	2.559	0.033	-0.487

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

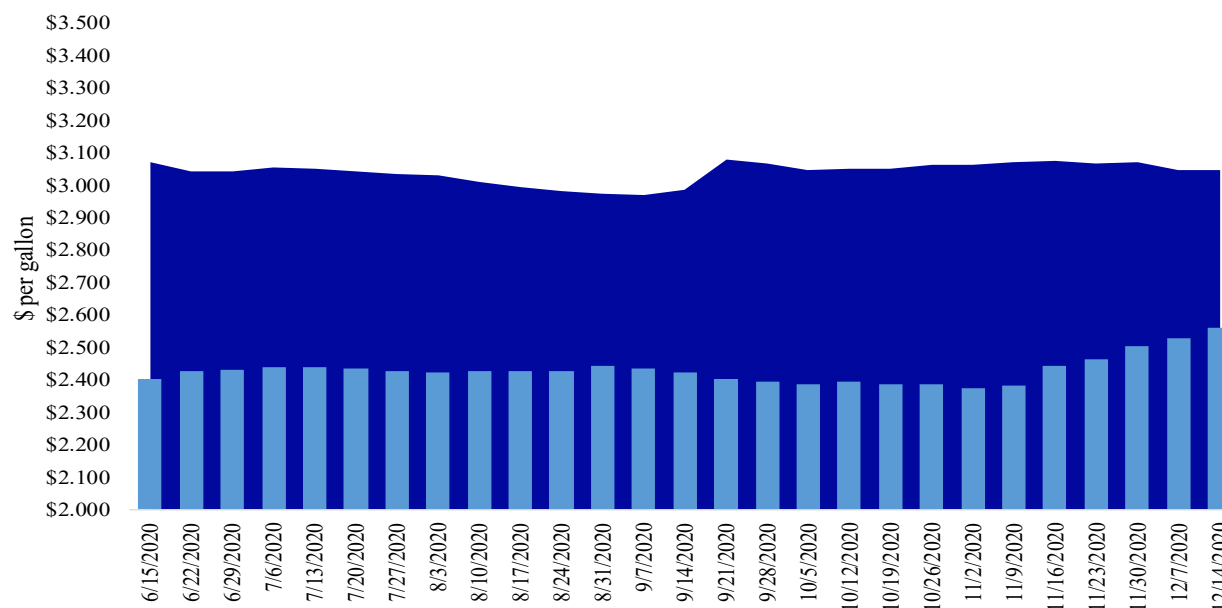
Source: U.S. Department of Energy, Energy Information Administration.

Figure 13

Weekly diesel fuel prices, U.S. average

For the week ending December 14, the U.S. average diesel fuel price increased 3.3 cents from the previous week to \$2.559 per gallon, 48.7 cents below the same week last year.

■ Last year ■ Current year
\$3.046 \$2.559



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									
12/3/2020	1,596	401	1,475	2,559	153	6,184	28,568	23,089	57,841
This week year ago	1,284	525	1,303	936	139	4,187	8,613	9,563	22,364
Cumulative exports-marketing year²									
2020/21 YTD	5,141	1,023	3,768	2,559	433	12,924	11,088	29,818	53,830
2019/20 YTD	4,922	1,455	3,469	2,385	541	12,771	6,876	17,431	37,078
YTD 2020/21 as % of 2019/20	104	70	109	107	80	101	161	171	145
Last 4 wks. as % of same period 2019/20*	121	77	114	256	126	144	322	273	268
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 12/03/2020	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 -			
Mexico	8,942	7,380	21	14,869
Japan	4,969	2,246	121	11,221
Columbia	1,905	1,162	64	4,830
Korea	994	25	3,828	4,011
China	11,320	60	18,830	909
Top 5 importers	28,130	10,872	159	35,840
Total U.S. corn export sales	39,655	15,489	156	49,983
% of projected exports	59%	34%		
Change from prior week ²	1,362	874		
Top 5 importers' share of U.S. corn export sales	71%	70%		72%
USDA forecast December 2020	67,430	45,242	49	
Corn use for ethanol USDA forecast, December 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 12/03/2020	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	30,354	9,847	208	19,106
Mexico	3,158	2,778	14	4,591
Egypt	1,661	1,174	41	2,980
Indonesia	923	823	12	2,360
Japan	993	1,050	(5)	2,288
Top 5 importers	37,089	15,673	137	31,324
Total U.S. soybean export sales	52,907	26,995	96	49,352
% of projected exports	88%	59%		
change from prior week ²	569	1,050		
Top 5 importers' share of U.S. soybean export sales	70%	58%		63%
USDA forecast, December 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 12/03/2020	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	2,493	2,474	1	3,213
Philippines	2,449	2,138	15	2,888
Japan	1,795	1,798	(0)	2,655
Nigeria	857	987	(13)	1,433
Korea	1,275	922	38	1,372
Indonesia	700	486	44	1,195
Taiwan	856	867	(1)	1,175
Thailand	642	536	20	727
Italy	534	601	(11)	622
Colombia	292	509	(43)	618
Top 10 importers	11,892	11,316	5	15,897
Total U.S. wheat export sales	19,109	16,958	13	23,821
% of projected exports	71%	64%		
change from prior week ²	617	503		
Top 10 importers' share of U.S. wheat export sales	62%	67%		67%
USDA forecast, December 2020	26,839	26,294	2	

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

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

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

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

Source: USDA, Foreign Agricultural Service.

Table 16

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

Port regions	For the week ending 12/10/20	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	234	377	62	15,115	13,301	114	124	120	13,961
Corn	137	198	69	9,190	7,027	131	775	131	7,047
Soybeans	569	779	73	12,677	11,769	108	131	166	11,969
Total	939	1,355	69	36,982	32,096	115	145	145	32,977
Mississippi Gulf									
Wheat	0	23	0	3,361	4,422	76	42	38	4,448
Corn	541	322	168	27,134	20,287	134	155	121	20,763
Soybeans	1,468	1,396	105	33,821	29,743	114	144	152	31,398
Total	2,008	1,741	115	64,316	54,452	118	143	138	56,609
Texas Gulf									
Wheat	26	48	54	4,204	5,899	71	100	75	6,009
Corn	0	0	n/a	682	608	112	111	106	640
Soybeans	108	107	100	1,717	2	n/a	n/a	n/a	2
Total	134	156	86	6,603	6,508	101	338	261	6,650
Interior									
Wheat	15	84	18	2,087	1,896	110	114	145	1,987
Corn	175	219	80	8,259	7,588	109	94	103	7,857
Soybeans	160	133	120	6,793	6,754	101	126	138	7,043
Total	350	437	80	17,139	16,239	106	108	120	16,887
Great Lakes									
Wheat	0	33	0	836	1,260	66	54	87	1,339
Corn	19	0	n/a	80	11	709	n/a	375	11
Soybeans	43	130	33	1,024	473	216	n/a	267	493
Total	62	162	38	1,941	1,744	111	179	166	1,844
Atlantic									
Wheat	0	0	n/a	65	37	175	n/a	n/a	37
Corn	0	0	n/a	33	99	33	n/a	5	99
Soybeans	91	114	80	1,612	1,320	122	296	178	1,353
Total	91	114	80	1,710	1,456	117	316	188	1,489
U.S. total from ports*									
Wheat	275	565	49	25,668	26,815	96	103	103	27,781
Corn	871	740	118	45,378	35,621	127	156	118	36,417
Soybeans	2,437	2,660	92	57,645	50,060	115	153	166	52,258
Total	3,583	3,964	90	128,690	112,496	114	146	143	116,457

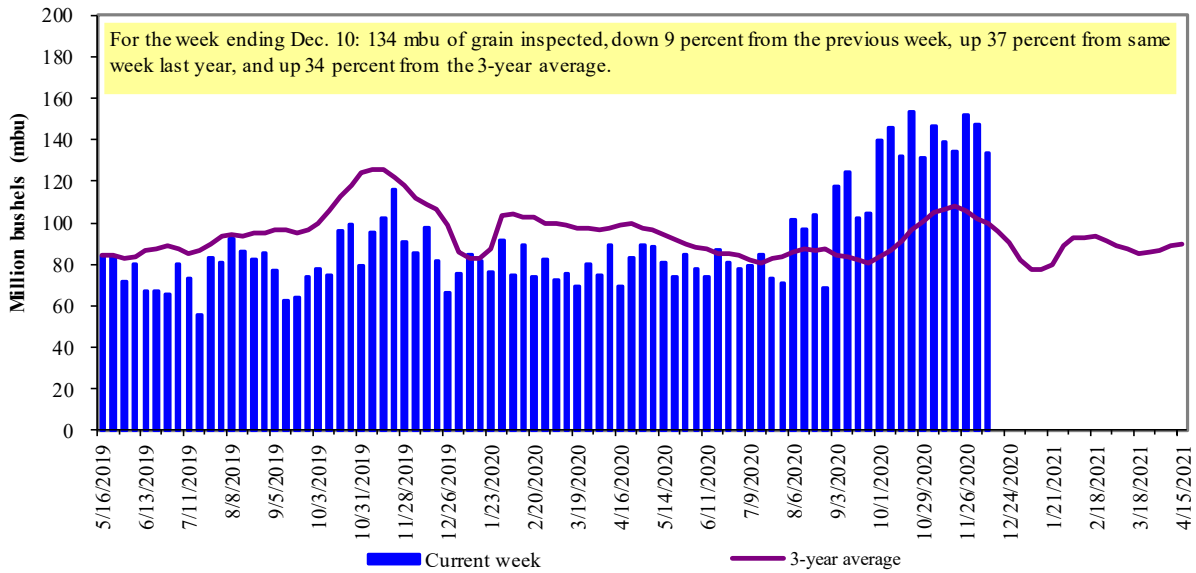
*Data includes revisions from prior weeks; some regional totals may not add exactly due to rounding.

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)

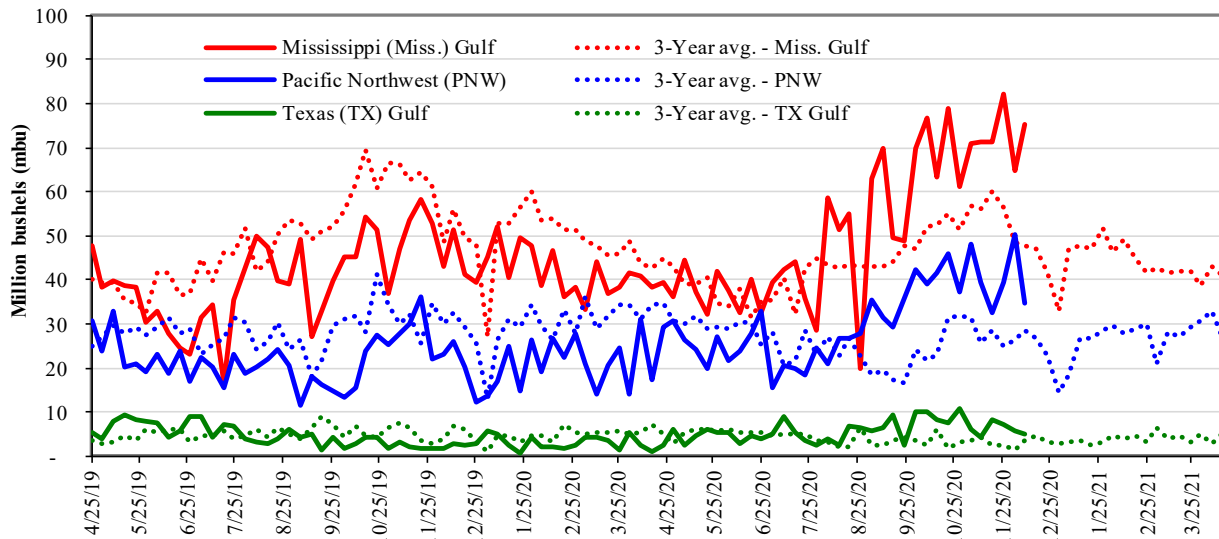


Note: 3-year average consists of 4-week running average.

Source: USDA, Federal Grain Inspection Service.

Figure 15

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



Week ending 12/10/20 inspections (mbu):	Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
MS Gulf: 75.2	Last wk:	up 16	down 14	up 14	down 31
PNW: 34.8	Last Year (same wk):	up 46	up 70	up 47	up 34
TX Gulf: 4.9	3-yr avg.(4-wk. mov. Avg):	up 41	up 96	up 44	up 29

Source: USDA, Federal Grain Inspection Service.

Ocean Transportation

Table 17

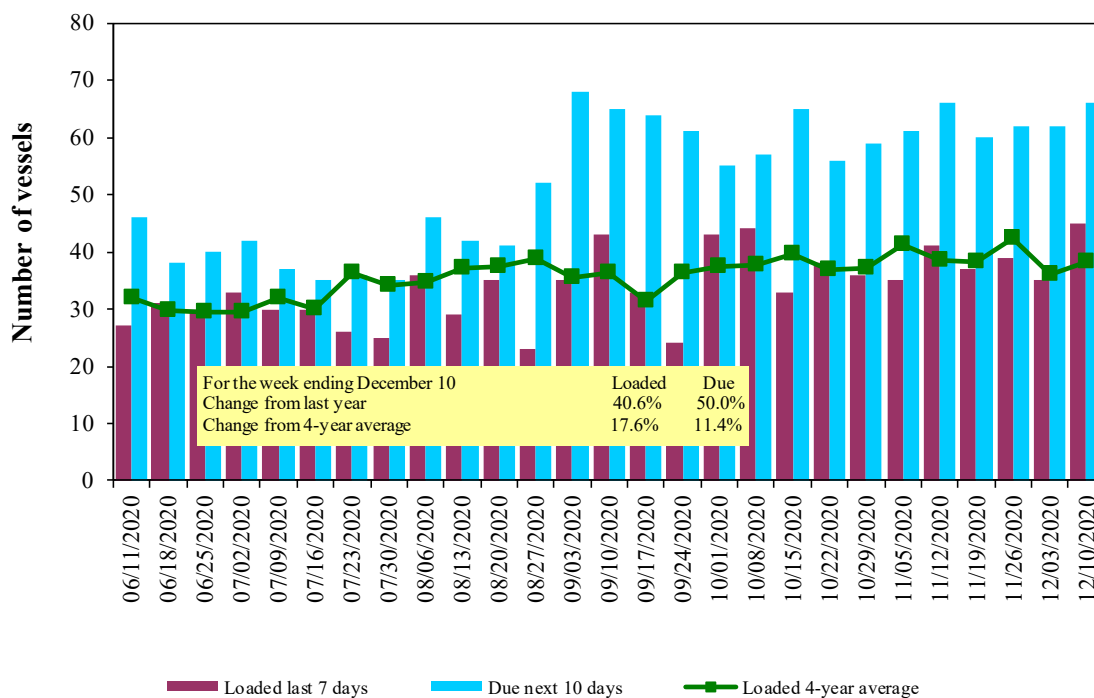
Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded	Due next	In port
		7-days	10-days	
12/10/2020	52	45	66	20
12/3/2020	58	35	62	18
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

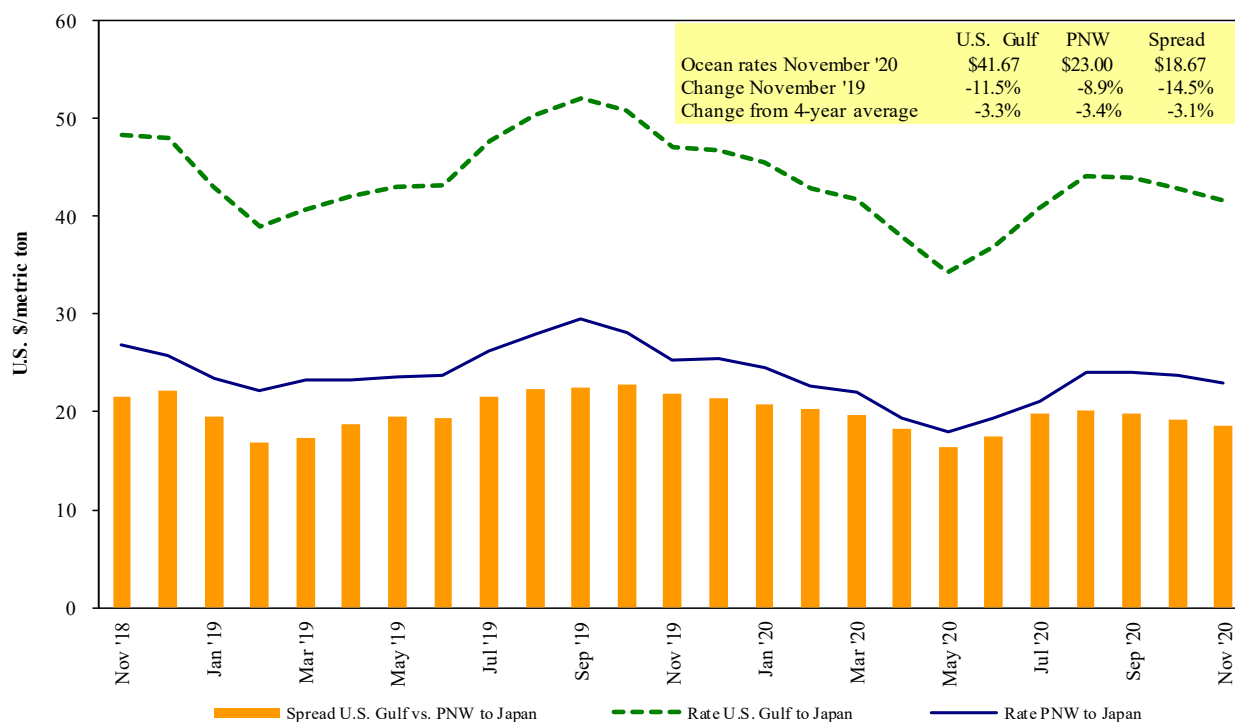
U.S. Gulf¹ vessel loading activity



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 12/12/2020

Export region	Import region	Grain types	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	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.

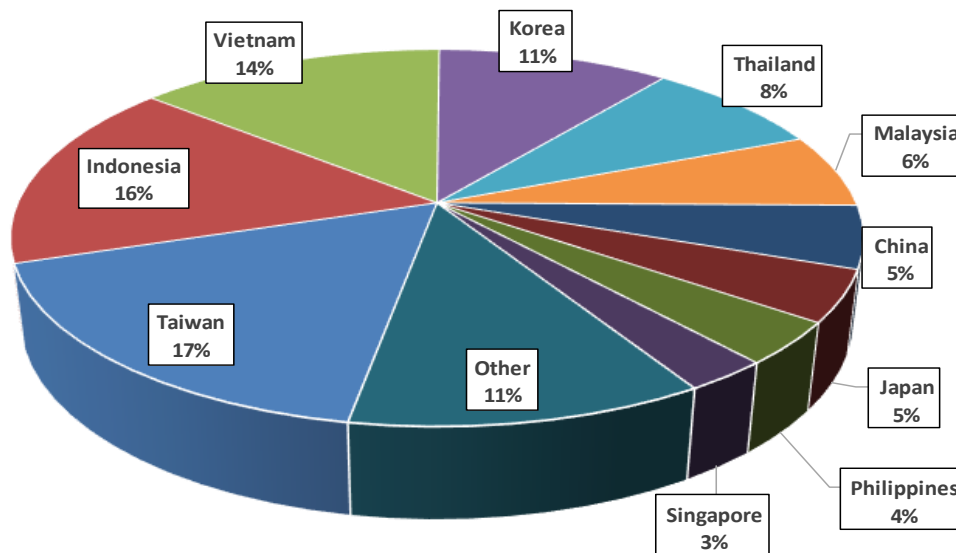
Note: Rates shown are per metric ton (2,204.62 lbs. = 1 metric ton), free on board (F.O.B), except where otherwise indicated;

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.

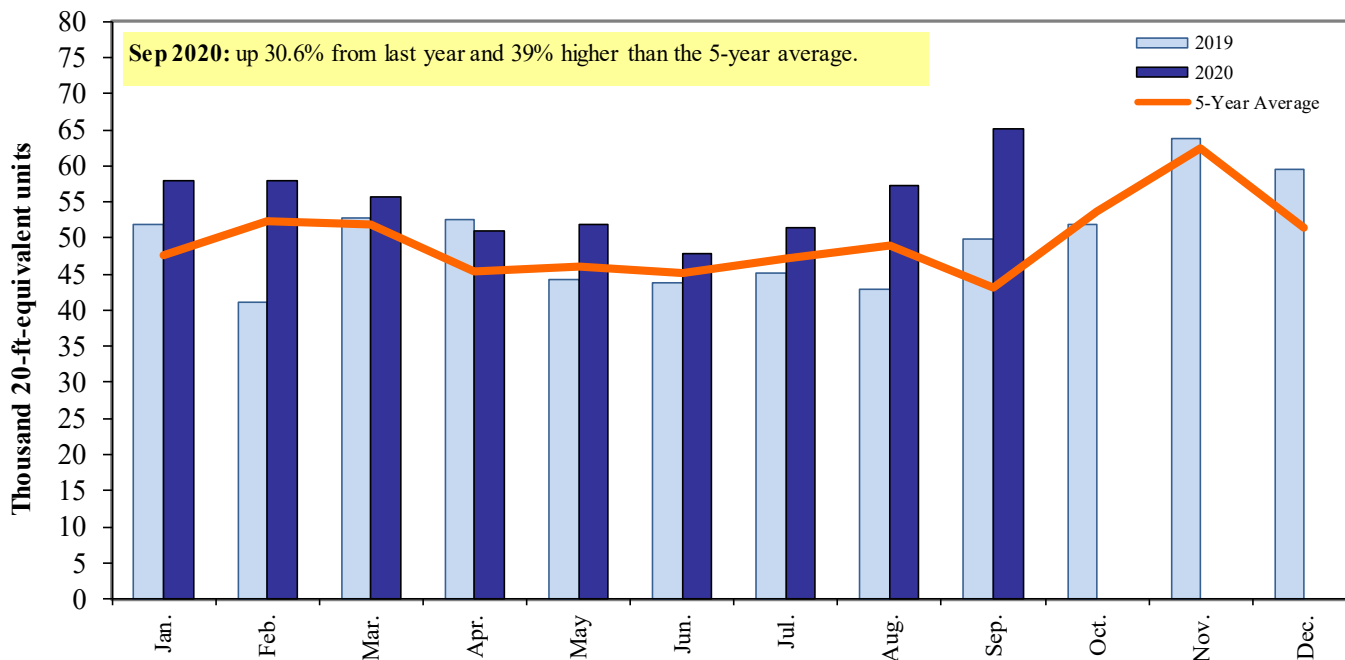
Figure 18
Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 2020



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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