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Brazil Soybean Transportation

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BRAZILIAN SOYBEAN EXPORTS: 2025 CAPACITY EXPANSION AND IMPROVEMENT

Rise in Brazilian soybeans' cost competitiveness facilitated by infrastructure improvements. Brazil's total exports more than doubled from 42.8 million metric tons (mmt) in 2013 to 98.8 mmt in 2024 (fig. 1) (Comex Stat, MDIC).[1] In the first 6 months of 2025, Brazil exported 64.9 mmt of soybeans, 22 mmt more than the total exported in 2013. The sharp rise resulted from a comprehensive infrastructure improvement plan initiated by the Brazilian Government and the private sector in 2007. The Center-West region's infrastructure transportation investments developed tight rail and barge competition to ship soybeans between the ports of Barcarena (north) and Santos (south). While rail and truck compete to haul soybeans to the southern ports, barges ship to the northern ports. To facilitate rising agricultural export demand, the southern ports added efficiencies that lowered transportation costs and increased Brazil's competitive advantage in the world soybean and oilseed market.[2]

China is the largest world soybean buyer and Brazil is its major supplier. In first half of 2025, the southern ports of Santos, Paranaguá, Rio Grande, and São Francisco do Sul continued dominating Brazil's soybean trade to China, accounting for nearly 66 percent of Brazil's soybean exports to China (48.5 million metric tons (mmt)). Of that volume, 41 percent was shipped through the port of Santos.

COFCO International investments in Brazil. In 2014, COFCO International entered Brazil as part of China's longstanding strategic objective to ensure China's food security with stable supplies of agricultural products from abroad. Having expanded since 2014—making significant investments in agricultural and logistic sectors—the company now ranks as the 14th-largest company in Brazil. Since 2022, in Brazil, the company's primary focus is on the southern port of Santos to export soybeans to China, rather than the recently inaugurated mega port of Chancay, Peru—another potential export route to China.

COFCO's Port of Santos investment plan includes a new export terminal that began construction in August 2022 and began operating in March. In 2025, the terminal is expected to move 8 million tons of grains, sugar, and soybean meal. Once the terminal is fully operational and providing services to third parties (by 2026), the terminal's handling capacity will expand to move 14-14.5 million tons of grains, sugar, and soybean meal annually. The terminal logistics, including rail transport, will be automated in ways similar to systems used in China and Peru. By building, owning, and operating the Port of Santos, COFCO eliminates the use of third-party terminal operators that had kept the company's costs 10-15 percent higher than those of its competitors (DatamarNews).

The rest of Brazil's soybean exports to China (i.e., that do not leave through Santos) will continue to leave from the Arco Norte, through the terminals with Hidrovias do Brasil. In addition, COFCO is investing in truck shipments from the producing regions of Balsas, Maranhão, to the Port of Itaqui/São Luís in the same State (Globorural).

1 In this report, the source of Brazil export data is the Comex Stat, Ministério do Desenvolvimento, Indústria, Comércio e Serviços (MDIC).
2 The port of Santos, in collaboration with the rail and agribusiness industries, spearheaded some of these advances.

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Inland and ocean freight rates—year to year. From second quarter 2024 to second quarter 2025 (year to year), the cost of shipping a metric ton (mt) of soybeans 100 miles by truck declined nearly 2 percent—from $7.86 per mt to $7.72 per mt (table 8). Truck rates made their typical seasonal decline in April and May, with the end of the soybean harvest season and reduced diesel prices. In June truck rates slightly rebounded with the beginning of the second corn crop harvest (table 8). Like truck rates, rail rates also declined in second quarter of 2025.

At the end of June, Brazil completed its soybean harvest and exported a record-high 64.9 mmt of soybeans. Expanded planted area and good climate conditions raised productivity: soybean production rose by 15 percent year to year, from 147.7 mmt to an estimated 169.6 mmt (CONAB). In second quarter 2025, a large soybean crop—coupled with strong Chinese demand for it—resulted in higher barge rates from Itaituba to Santarém and Barcarena than the unusually low barge rates in second quarter 2024.

On average, from Brazil's southern ports, ocean rates to Shanghai and Hamburg rose about 11 percent year to year. From Brazil's northern ports, ocean rates increased 9 percent to both Shanghai and Hamburg (tables 1a, 1b, 2a, 2b, and 9). A surge in soybean exports to China and higher exports of iron ore in May and June contributed to the rise in ocean rates (GMK Center, Argus, and OEC).

Decline in landed costs. For selected Brazilian export routes to China, total landed costs decreased because of lower farm values. But soybean transportation costs to Shanghai—as a share of total landed costs—increased 9-18 percent year to year for the routes from northern MT to Santos and Barcarena (tables 1a and 1b). Also, year to year, total soybean transportation costs to Shanghai were as follows: from Sorriso by truck, about the same; from Santos by rail, up nearly 2 percent; and from Sorriso by barge, via Barcarena, up nearly 10 percent (tables 1a and 1b).

Farm gate prices and depreciation of Brazilian real. From second quarter 2024 to second quarter 2025, average Brazilian soybean export prices fell 9 percent, from $432 per mt to $391 per mt. Measured in U.S. dollars, soybean farm gate prices declined 8 percent, from $371.30/mt to $342.560/mt—and measured in reais, increased 4 percent from R$1,936.88/mt to R$2,014.56/mt (CONAB). The real's depreciation against the U.S. dollar resulted in higher domestic farm prices. The Brazilian real (R$) depreciated nearly 9 percent against the U.S. dollar, from R$5.22 per US$ in second quarter 2024 to R$5.67 in second quarter 2025 (Brazil Central Bank).

Brazilian port shares of soybean exports to China. In second quarter 2025, Brazil's soybean exports to China totaled 31.5 mmt—up nearly 4 percent from second quarter 2024's total of 30.4 mmt. Cumulative exports to China, from January to June 2025, reached 48.5 mmt of soybeans, valued at $19 billion and accounted for nearly 75 percent of Brazil's total soybean exports for the period (64.9 mmt). From January to June 2025, the highest share of Brazil's soybean exports went to China. The next highest shares (in declining order) went to Spain, Thailand, Turkey, Iran, and Mexico. The Port of Santos was the largest Brazilian export gateway to China, followed by Paranaguá, São Luís, Barcarena, São Francisco do Sul, and Rio Grande. Together, these six ports accounted for 89 percent of Brazilian soybean exports to China.

In the first half of 2025, 66 percent of Brazil's soybean exports to China originated from the southern ports of Santos, Rio Grande, Paranaguá, and São Francisco do Sul; 20 percent, from the northeastern ports of São Luís, Vitória, and Salvador; and 14 percent from the northern ports of Barcarena, Manaus and Santarém. For more information, contact Delmy L. Salin at delmy.salin@usda.gov.

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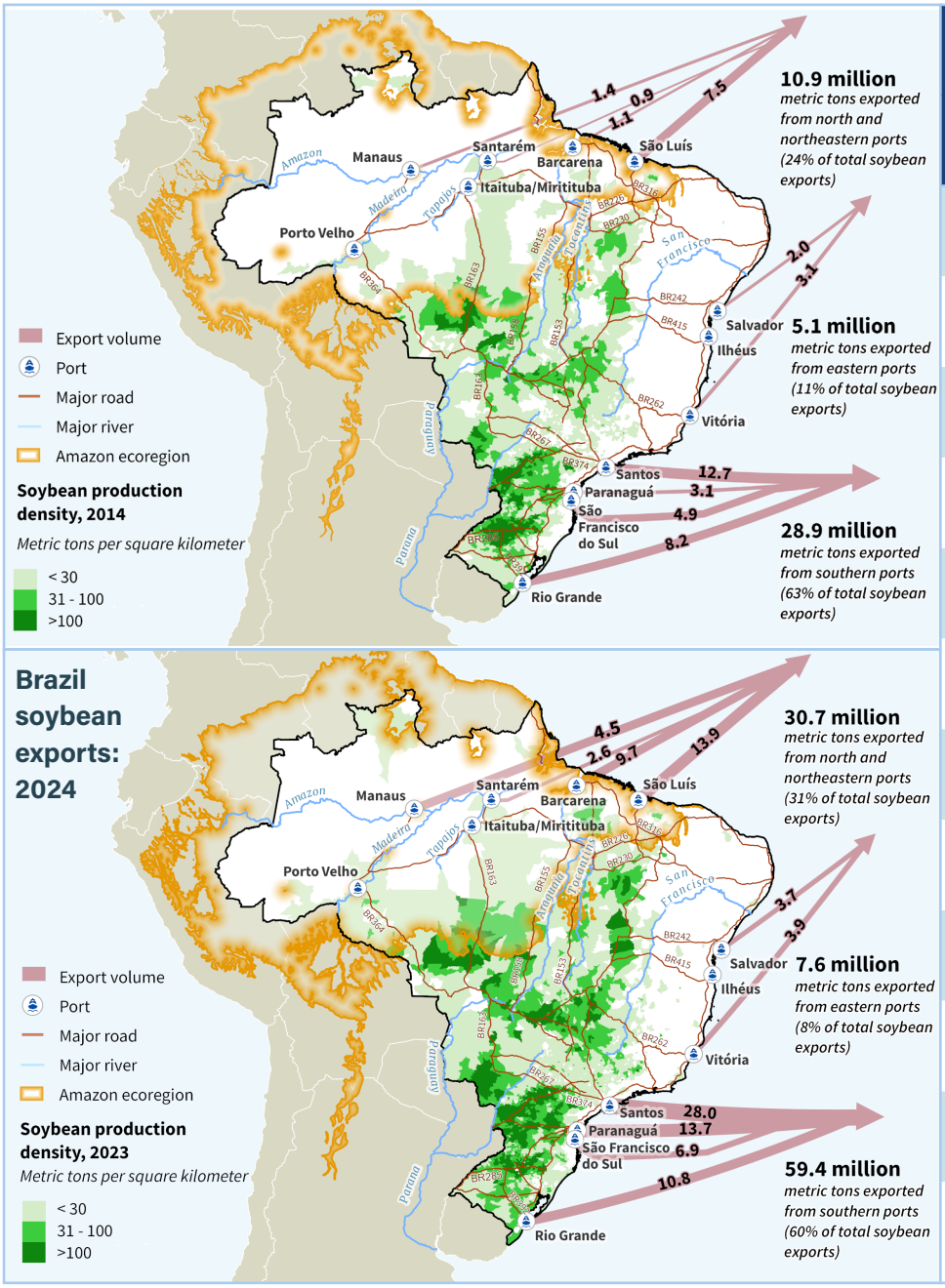
Figure 1. Brazilian soybean exports by port, 2013-25 (through June)



Port	Milion metric tons			
	2013	2014	2024	Jan-June 2025
Santos	12.9	12.7	28.0	23.9
São Luís	3.0	3.1	13.9	7.9
Paranaguá	7.7	7.5	13.7	7.6
Rio Grande	8.2	8.2	10.8	2.5
Barcarena/ Belém	-	1.1	9.7	7.1
São Francisco do Sul	4.0	4.9	6.9	3.3
Manaus	1.3	1.4	4.5	4.6
Vitória	2.8	3.1	3.9	1.9
Salvador	1.8	2.0	3.7	2.3
Santarém	1.0	0.9	2.6	2.9
Other	0.1	0.7	1.1	0.9
Total	**42.8**	**45.7**	**98.8**	**64.9**

Amazon ecoregion provided by World Wildlife Fund.

Soybean production density provided by Brazilian Institute of Geography and Statistics—Produção Agricola Municipal.

Map source: USDA/Agricultural Marketing Service and USDA/Foreign Agricultural Service.

Data table source: Comex Stat, Ministério da Indústria, Comércio Exterior e Serviços (MDIC).

Note: A hyphen in an otherwise empty cell denotes that the data are not available. The table totals for 2013, 2014, and 2023 differ from the map totals, because the table totals include an "other ports" category (not included in the map).

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Table 1a. Quarterly costs of transporting Brazilian soybeans from the southern ports to Shanghai, China

Item	North MT - Santos by truck			Northwest RS - Rio Grande		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	91.10	87.35	-4.1	29.10	27.96	-3.9
Ocean	33.30	37.00	11.1	33.80	37.50	10.9
Total transportation	124.40	124.35	0.0	62.90	65.46	4.1
Farm gate price	366.79	325.53	-11.2	381.34	367.15	-3.7
Landed cost	491.19	449.88	-8.4	444.25	432.61	-2.6
Transport % of landed cost	25.3	27.6	9.1	14.2	15.1	6.9

Item	North MT - Santos by rail			North MT - Paranaguá		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	29.89	30.27	1.3	90.18	85.75	-4.9
Rail	48.56	46.59	-4.1	-	-	-
Ocean	33.30	37.00	11.1	34.80	38.50	10.6
Total transportation	111.76	113.86	1.9	124.98	124.25	-0.6
Farm gate price	366.79	325.53	-11.2	366.79	325.53	-11.2
Landed cost	478.54	439.39	-8.2	491.76	449.77	-8.5
Transport % of landed cost	23.4	25.9	11.0	25.4	27.6	8.7

Producing regions: MT= Mato Grosso and RS = Rio Grande Do Sul.
Export ports = Santos, Rio Grande, and Paranaguá.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In Brazil, there are no published rail tariff rates. Rail rates can be up to 30 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the railroad company and shippers.
Note: qtr. = quarter. mt = metric ton. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

Brazil Soybean Transportation

Table 1b. Quarterly costs of transporting Brazilian soybeans from the northern and northeastern ports to Shanghai, China

Item	North MT - Santarém			South MA - São Luís		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	67.30	56.01	-16.8	36.78	36.35	-1.2
Ocean	36.50	40.00	9.6	37.10	40.50	9.2
Total transportation	103.80	96.01	-7.5	73.88	76.85	4.0
Farm gate price	366.79	325.53	-11.2	369.07	343.28	-7.0
Landed cost	470.58	421.54	-10.4	442.95	420.13	-5.2
Transport % of landed cost	22.1	22.8	3.3	16.7	18.3	9.7

Item	Southwest PI - São Luís			North MT - Barcarena		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	41.21	39.97	-3.0	46.45	49.74	7.1
Barge	-	-	-	20.42	24.08	17.9
Ocean	37.10	40.50	9.2	37.40	40.75	9.0
Total transportation	78.31	80.47	2.8	104.27	114.57	9.9
Farm gate price	369.30	336.73	-8.8	366.79	325.53	-11.2
Landed cost	447.60	417.20	-6.8	471.06	440.09	-6.6
Transport % of landed cost	17.5	19.3	10.3	22.1	26.0	17.6

Producing regions: MT= Mato Grosso, PI = Piauí, and MA = Maranhão.
Export ports = Santarém, São Luís, and Barcarena.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In Brazil, there are no published barge rates. Barge rates can be up to 60 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the barge company and shippers. The distance is in nautical miles.
Note: qtr. = quarter. mt = metric ton. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Table 2a. Quarterly costs of transporting Brazilian soybeans from the southern ports to Hamburg, Germany

Item	North MT - Santos by truck			Northwest RS - Rio Grande		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	91.10	87.35	-4.1	29.10	27.96	-3.9
Ocean	31.30	34.75	11.0	32.00	35.50	10.9
Total transportation	122.40	122.10	-0.2	61.10	63.46	3.9
Farm gate price	366.79	325.53	-11.2	381.34	367.15	-3.7
Landed cost	489.19	447.63	-8.5	442.45	430.61	-2.7
Transport % of landed cost	25.0	27.3	9.0	13.8	14.7	6.7
Item	**North MT - Santos by rail**			**North MT - Paranaguá**		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	29.89	30.27	1.3	90.18	85.75	-4.9
Barge	48.56	46.59	-4.1	-	-	-
Ocean	31.30	34.75	11.0	31.00	34.50	11.3
Total transportation	109.76	111.61	1.7	121.18	120.25	-0.8
Farm gate price	366.79	325.53	-11.2	366.79	325.53	-11.2
Landed cost	476.54	437.14	-8.3	487.96	445.77	-8.6
Transport % of landed cost	23.0	25.5	10.9	24.8	27.0	8.6

Producing regions: MT= Mato Grosso and RS = Rio Grande Do Sul.
Export ports = Santos, Rio Grande, and Paranaguá.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In Brazil, there are no published rail tariff rates. Rail rates can be up to 30 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the railroad company and shippers.
Note: qtr. = quarter. mt = metric ton. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

Brazil Soybean Transportation

Table 2b. Quarterly costs of transporting Brazilian soybeans from the northern and northeastern ports to Hamburg, Germany

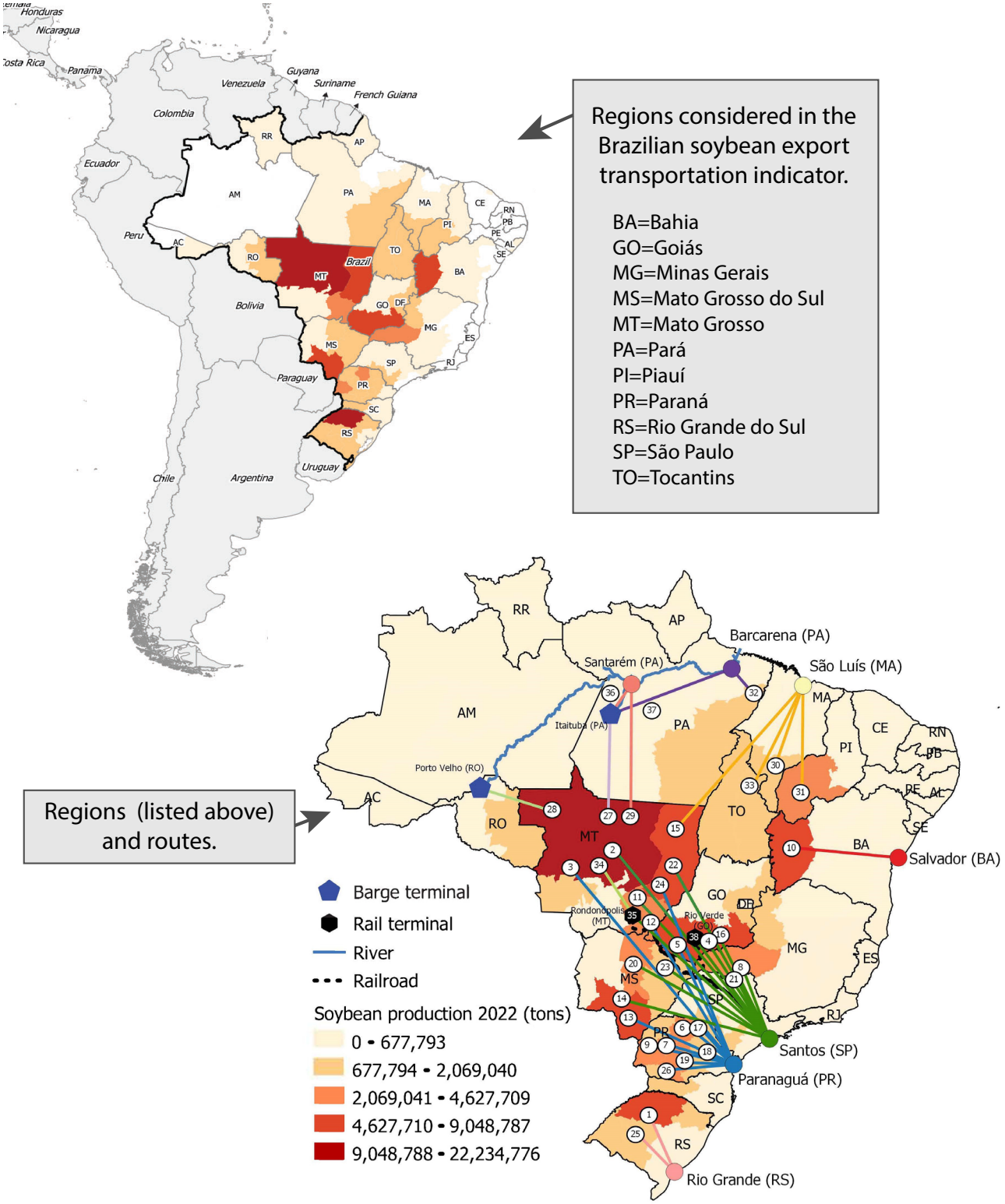
Item	North MT - Santarém			South MA - São Luís		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	67.30	56.01	-16.8	36.78	36.35	-1.2
Ocean	29.20	32.10	9.9	33.80	37.00	9.5
Total transportation	96.50	88.11	-8.7	70.58	73.35	3.9
Farm gate price	366.79	325.53	-11.2	369.07	343.28	-7.0
Landed cost	463.28	413.64	-10.7	439.65	416.63	-5.2
Transport % of landed cost	20.8	21.3	2.3	16.1	17.6	9.7

Item	Southwest PI - São Luís			North MT - Barcarena		
	—US$/mt—		% Change	—US$/mt—		% Change
	2nd qtr. 2024	2nd qtr. 2025	2024-25	2nd qtr. 2024	2nd qtr. 2025	2024-25
Truck	41.21	39.97	-3.0	46.45	49.74	7.1
Barge	-	-	-	20.42	24.08	17.9
Ocean	33.80	37.00	9.5	28.70	31.20	8.7
Total transportation	75.01	76.97	2.6	95.57	105.02	9.9
Farm gate price	369.30	336.73	-8.8	366.79	325.53	-11.2
Landed cost	444.30	413.70	-6.9	462.36	430.54	-6.9
Transport % of landed cost	16.9	18.6	10.2	20.7	24.4	18.0

Producing regions: MT= Mato Grosso, PI = Piauí, and MA = Maranhão.
Export ports = Santarém, São Luís, and Barcarena
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In Brazil, there are no published barge rates. Barge rates can be up to 60 percent lower than truck rates, depending on volumes hauled and the terms of contracts signed between the barge company and shippers. The distance is in nautical miles.
Note: qtr. = quarter. mt = metric ton. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

INDICATORS

Figure 2. Routes and regions considered in the Brazilian soybean export transportation indicator



Notes: Table defining routes by number is shown on page 12. Regions comprised about 78 percent of Brazilian soybean production, 2022 (Brazilian Institute of Geography and Statistics—Produção Agricola Municipal).
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Table 3. Quarterly costs of transporting Brazilian soybeans from the southern ports to Shanghai, China, 2025

Item	North MT - Santos by truck —US$/mt—					North MT - Paranaguá —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	83.54	87.35			85.44	82.41	85.75			84.08
Ocean	36.00	37.00			36.50	37.50	38.50			38.00
Total transportation	119.54	124.35			121.94	119.91	124.25			122.08
Farm gate price	317.36	325.53			321.44	317.36	325.53			321.44
Landed cost	436.89	449.88			443.39	437.26	449.77			443.52
Transport % of landed cost	27.4	27.6			27.5	27.4	27.6			27.5

Item	North MT - Santos by rail —US$/mt—					Northwest RS - Rio Grande —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	29.29	30.27			29.78	28.81	27.96			28.38
Rail	48.90	46.59			47.74	-	-			-
Ocean	36.00	37.00			36.50	36.50	37.50			37.00
Total transportation	114.19	113.86			114.02	65.31	65.46			65.38
Farm gate price	317.36	325.53			321.44	359.26	367.15			363.20
Landed cost	431.55	439.39			435.47	424.57	432.61			428.59
Transport % of landed cost	26.5	25.9			26.2	15.4	15.1			15.3

Producing regions: RS = Rio Grande do Sul and MT= Mato Grosso.
Export ports = Santos, Paranaguá, and Rio Grande.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In, Brazil, there are no published rail tariff rates. Rail rates can be up to 30 percent lower than truck rates, depending on volumes hauled and the terms of contracts signed between the railroad company and shippers.
Note: qtr. = quarter. mt = metric ton. Avg. = average. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Table 4. Quarterly costs of transporting Brazilian soybeans from the southern ports to Hamburg, Germany, 2025

Item	North MT - Santos by truck —US$/mt—					North MT - Paranaguá —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	83.54	87.35			85.44	82.41	85.75			84.08
Ocean	33.90	34.75			34.33	33.60	34.50			34.05
Total transportation	117.44	122.10			119.77	116.01	120.25			118.13
Farm gate price	317.36	325.53			321.44	317.36	325.53			321.44
Landed cost	434.79	447.63			441.21	433.36	445.77			439.57
Transport % of landed cost	27.0	27.3			27.1	26.8	27.0			26.9

Item	North MT - Santos by rail —US$/mt—					Northwest RS - Rio Grande —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	29.29	30.27			29.78	28.81	27.96			28.38
Rail	48.90	46.59			47.74	-	-			-
Ocean	33.90	34.75			34.33	34.60	35.50			35.05
Total transportation	112.09	111.61			111.85	63.41	63.46			63.43
Farm gate price	317.36	325.53			321.44	359.26	367.15			363.20
Landed cost	429.45	437.14			433.29	422.67	430.61			426.64
Transport % of landed cost	26.1	25.5			25.8	15.0	14.7			14.9

Producing regions: RS = Rio Grande do Sul and MT= Mato Grosso.
Export ports = Santos, Paranaguá, and Rio Grande.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In, Brazil, there are no published rail tariff rates. Rail rates can be up to 30 percent lower than truck rates, depending on volumes hauled and the terms of contracts signed between the railroad company and shippers.
Note: qtr. = quarter. mt = metric ton. Avg. = average. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Table 5. Quarterly costs of transporting Brazilian soybeans from the northern and northeastern ports to Shanghai, China, 2025

Item	North MT[1] - Santarém[2] —US$/mt—					South MA[1] - São Luís[2] —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	54.63	56.01			55.32	33.64	36.35			34.99
Ocean	39.00	40.00			39.50	39.65	40.50			40.08
Total transportation	93.63	96.01			94.82	73.29	76.85			75.07
Farm gate price	317.36	325.53			321.44	333.41	343.28			338.35
Landed cost	410.99	421.54			416.26	406.70	420.13			413.41
Transport % of landed cost	22.8	22.8			22.8	18.0	18.3			18.2
Item	**Southwest PI[1] - São Luís[2] —US$/mt—**					**North MT[1] - Barcarena[2] —US$/mt—**				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	39.63	39.97			39.80	45.99	49.74			47.86
Barge	-	-			-	23.08	24.08			23.58
Ocean	39.65	40.50			40.08	39.75	40.75			40.25
Total transportation	79.28	80.47			79.88	108.82	114.57			111.69
Farm gate price	338.33	336.73			337.53	317.36	325.53			321.44
Landed cost	417.61	417.20			417.41	426.18	440.09			433.14
Transport % of landed cost	19.0	19.3			19.1	25.5	26.0			25.8

Producing regions: MT= Mato Grosso, PI = Piauí, and MA = Maranhão.
Export ports = Santarém, São Luís, and Barcarena.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In Brazil, there are no published barge rates. Barge rates can be up to 60 percent lower than truck rates, depending on volumes hauled and the terms of contracts signed between the barge company and shippers. The distance is in nautical miles.
Note: qtr. = quarter. mt = metric ton. Avg. = average. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

Brazil Soybean Transportation

Table 6. Quarterly costs of transporting Brazilian soybeans from the northern and northeastern ports to Hamburg, Germany, 2025

Item	North MT - Santarém —US$/mt—					South MA - São Luís —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	54.63	56.01			55.32	33.64	36.35			34.99
Ocean	31.30	32.10			31.70	36.20	37.00			36.60
Total transportation	85.93	88.11			87.02	69.84	73.35			71.59
Farm gate price	317.36	325.53			321.44	333.41	343.28			338.35
Landed cost	403.29	413.64			408.46	403.25	416.63			409.94
Transport % of landed cost	21.3	21.3			21.3	17.3	17.6			17.5

Item	Southwest PI - São Luís —US$/mt—					North MT - Barcarena —US$/mt—				
	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
Truck	39.63	39.97			39.80	49.61	49.74			49.67
Barge	-	-			-	23.08	24.08			23.58
Ocean	36.20	37.00			36.60	30.40	31.20			30.80
Total transportation	75.83	76.97			76.40	103.09	105.02			104.05
Farm gate price	338.33	336.73			337.53	317.36	325.53			321.44
Landed cost	414.16	413.70			413.93	420.45	430.54			425.50
Transport % of landed cost	18.3	18.6			18.5	24.5	24.4			24.5

Producing regions: MT= Mato Grosso, PI = Piauí, and MA = Maranhão.
Export ports = Santarém, São Luís, and Barcarena.
The source of the farm gate price is the Brazilian Government, Companhia Nacional de Abastecimento (CONAB).
In Brazil,there are no published barge rates. Barge rates can be up to 60 percent lower than truck rates, depending on volumes hauled and the terms of contracts signed between the barge company and shippers. The distance is in nautical miles.
Note: qtr. = quarter. mt = metric ton. Avg. = average. A hyphen in an otherwise empty cell denotes that the data are not available.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Table 7. Quarterly truck rates for selected Brazilian soybean export transportation routes, 2025

Route #	Origin (reference city)	Destination	Distance (miles)	Share (%)	Freight price (US$/mt/100 miles)				
					1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
1	Northwest RS (Cruz Alta)	Rio Grande	288	5.2	10.00	9.71			9.86
2	North MT (Sorriso)	Santos	1,190	3.3	7.02	7.34			7.18
3	North MT (Sorriso)	Paranaguá	1,262	3.1	6.53	6.79			6.66
4	South GO (Rio Verde)	Santos	587	5.4	6.94	7.10			7.02
5	South GO (Rio Verde)	Paranaguá	726	4.4	6.98	7.02			7.00
6	North Central PR (Londrina)	Paranaguá	268	3.1	9.98	9.81			9.89
7	Western Central PR (Mamborê)	Paranaguá	311	2.4	9.25	9.19			9.22
8	Triangle MG (Uberaba)	Santos	339	3.5	9.70	9.59			9.64
9	West PR (Assis Chateaubriand)	Paranaguá	377	2.7	8.35	8.36			8.35
10	West Extreme BA (São Desidério)	Salvador	535	6.5	7.56	7.90			7.73
11	Southeast MT (Primavera do Leste)	Santos	901	2.6	6.45	6.63			6.54
12	Southeast MT (Primavera do Leste)	Paranaguá	975	2.4	6.15	6.22			6.19
13	Southwest MS (Maracaju)	Paranaguá	612	3.8	7.41	6.97			7.19
14	Southwest MS (Maracaju)	Santos	652	3.6	7.45	7.84			7.64
15	Northeast MT (Canarana)	São Luís	1,177	2.3	6.14	6.52			6.33
16	East GO (Cristalina)	Santos	585	1.6	7.97	8.24			8.11
17	North PR (Cornélio Procópio)	Paranaguá	306	1.6	8.12	7.97			8.05
18	Eastern Central PR (Castro)	Paranaguá	130	1.7	13.50	12.84			13.17
19	South Central PR (Guarapuava)	Paranaguá	204	2.3	11.53	11.43			11.48
20	North Central MS (São Gabriel do Oeste)	Santos	720	2.6	6.55	6.91			6.73
21	Ribeirão Preto SP (Guairá)	Santos	314	0.5	7.95	7.93			7.94
22	Northeast MT (Canarana)	Santos	950	2.8	6.56	6.76			6.66
23	East MS (Chapadão do Sul)	Santos	607	1.6	6.49	6.52			6.50

The main city in the region is considered as a reference to establish the freight price.
Distance from the main city of the considered region to the mentioned ports.
Share of exports is measured as a percentage of total production.
Average monthly exchange rate from "Banco Central do Brasil" was used to convert Brazilian reais to the U.S. dollars.
RS=Rio Grande do Sul, MT=Mato Grosso, GO=Goiás, PR=Paraná, MG=Minas Gerais, BA=Bahia, MS=Mato Grosso do Sul, SP=São Paulo, PI=Piauí, MA=Maranhão, PA=Pará, and TO=Tocantins.
In Brazil, there are no published rail tariff rates. Rail rates can be up to 30 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the railroad company and shippers.
In Brazil, there are no published barge rates. Barge rates can be up to 60 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the barge company and shippers. The distance is in nautical miles.
Note: qtr. = quarter. mt = metric ton. Avg. = average.
For more details, on the definitions/calculations contact esalqlog@esalqlog.esalq.usp.br.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Route #	Origin (reference city)	Destination	Distance (miles)	Share (%)	Freight price (US$/mt/100 miles)				
					1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	Avg.
24	Northeast MT (Canarana)	Paranaguá	1,075	2.5	6.52	6.89			6.71
25	Western Central RS (Tupanciretã)	Rio Grande	273	1.1	9.34	8.73			9.03
26	Southwest PR(Chopinzinho)	Paranaguá	291	1.7	9.21	9.10			9.16
27	North MT (Sorriso)	Itaituba	672	6.6	6.85	7.40			7.13
28	North MT (Sorriso)	Porto Velho	632	6.2	6.52	6.71			6.61
29	North MT (Sorriso)	Santarém	876	4.5	6.24	6.39			6.31
30	South MA (Balsas)	São Luís	482	1.8	6.99	7.55			7.27
31	Southwest PI (Bom Jesus)	São Luís	606	2.7	6.54	6.60			6.57
32	Southeast PA (Paragominas)	Barcarena	249	2.1	7.20	7.47			7.33
33	East TO (Campos Lindos)	São Luís	842	2.1	6.21	6.31			6.26
	Weighted average		**587**	**100.0**	**7.60**	**7.72**			**7.66**
34	North MT (Sorriso)	Rondonópolis (Rail terminal)	382		7.67	7.92			7.80
35	Rondonópolis MT (Rail terminal)	Santos	1,019		4.80	4.57			4.69
36	Itaituba PA (Barge terminal)	Santarém	153		6.24	6.24			6.24
37	Itaituba PA (Barge terminal)	Barcarena	600		3.85	4.01			3.93
38	South GO (Rio Verde) (Rail terminal)	Santos	546		6.07	6.18			6.13

The main city in the region is considered as a reference to establish the freight price.
Distance from the main city of the considered region to the mentioned ports.
Share of exports is measured as a percentage of total production.
Average monthly exchange rate from "Banco Central do Brasil" was used to convert Brazilian reais to the U.S. dollars.
RS=Rio Grande do Sul, MT=Mato Grosso, GO=Goiás, PR=Paraná, MG=Minas Gerais, BA=Bahia, MS=Mato Grosso do Sul, SP=São Paulo, PI=Piauí, MA=Maranhão, PA=Pará, and TO=Tocantins.
In Brazil, there are no published rail tariff rates. Rail rates can be up to 30 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the railroad company and shippers.
In Brazil, there are no published barge rates. Barge rates can be up to 60 percent lower than truck rates, depending on the volumes hauled and the terms of contracts signed between the barge company and shippers. The distance is in nautical miles.
Note: qtr. = quarter. mt = metric ton. Avg. = average.
For more details, on the definitions/calculations contact esalqlog@esalqlog.esalq.usp.br.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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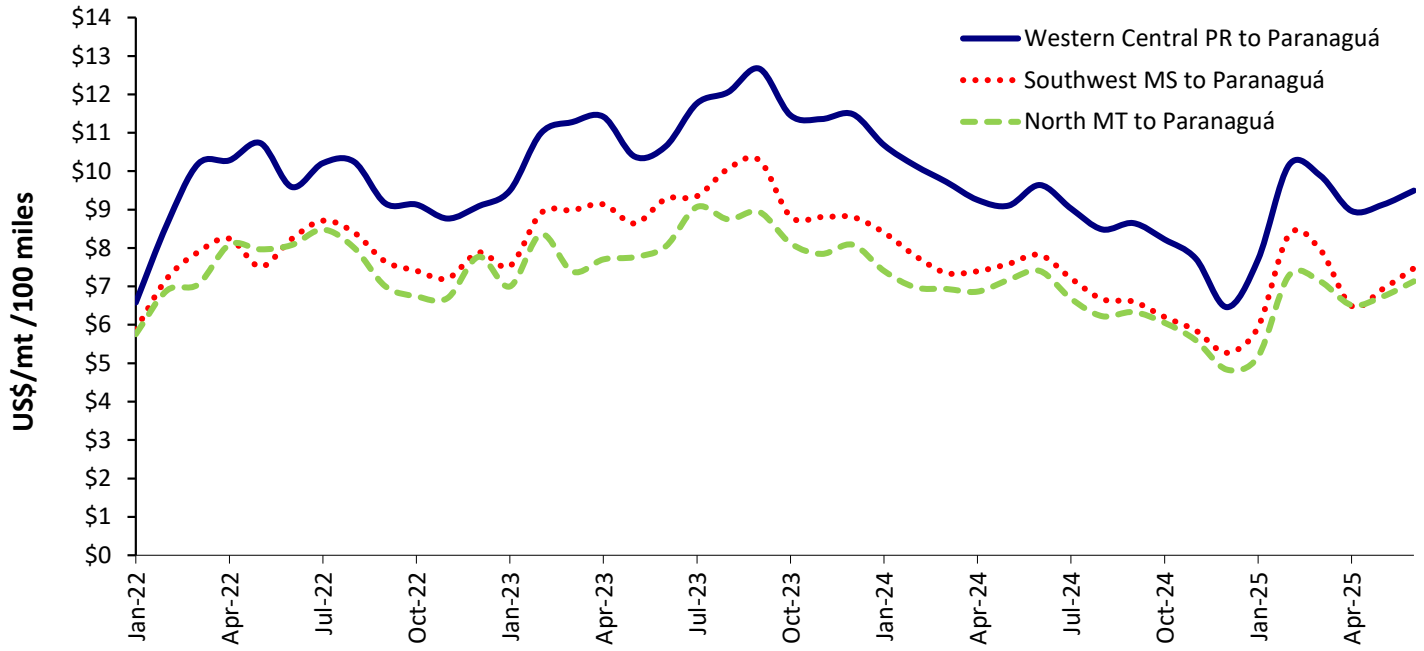
Table 8. Monthly Brazilian soybean export truck transportation cost index

Month	Freight price (US$/mt/100 miles)	Index variation (%) (Base: prior month)	Index value (Base: Jan-05=100)	Month	Freight price (US$/mt/100 miles)	Index variation (%) (Base: prior month)	Index value (Base: Jan-05=100)
Jan-18	7.59	5.0	130.90	Jan-22	5.94	30.9	102.42
Feb-18	8.65	13.9	149.04	Feb-22	7.77	30.8	134.02
Mar-18	10.59	22.5	182.61	Mar-22	8.59	10.4	147.99
Apr-18	9.78	-7.7	168.59	Apr-22	8.83	2.9	152.27
May-18	8.96	-8.4	154.45	May-22	9.05	2.4	155.94
Jun-18	8.89	-0.8	153.24	Jun-22	8.83	-2.4	152.18
Jul-18	8.97	0.9	154.58	Jul-22	8.98	1.7	154.78
Aug-18	8.24	-8.1	142.00	Aug-22	8.79	-2.1	151.51
Sep-18	7.24	-12.1	124.78	Sep-22	7.93	-9.8	136.68
Oct-18	7.69	6.2	132.55	Oct-22	7.71	-2.7	132.98
Nov-18	7.51	-2.3	129.44	Nov-22	7.42	-3.9	127.84
Dec-18	7.19	-4.3	123.87	Dec-22	7.94	7.1	136.89
Jan-19	7.72	7.5	133.13	Jan-23	7.97	0.4	137.38
Feb-19	8.19	6.0	141.15	Feb-23	9.41	18.1	162.28
Mar-19	7.34	-10.3	126.61	Mar-23	9.39	-0.3	161.87
Apr-19	7.16	-2.6	123.35	Apr-23	9.57	1.9	164.91
May-19	6.73	-5.9	116.02	May-23	9.27	-3.1	159.82
Jun-19	6.94	3.1	119.56	Jun-23	9.38	1.1	161.64
Jul-19	8.33	20.1	143.60	Jul-23	10.09	7.6	173.97
Aug-19	7.85	-5.8	135.23	Aug-23	10.09	0.0	173.94
Sep-19	7.09	-9.7	122.17	Sep-23	10.50	4.1	181.01
Oct-19	6.57	-7.4	113.19	Oct-23	9.38	-10.7	161.66
Nov-19	6.41	-2.3	110.54	Nov-23	9.36	-0.2	161.31
Dec-19	5.93	-7.5	102.21	Dec-23	9.55	2.0	164.60
Jan-20	6.03	1.7	103.90	Jan-24	8.57	-10.3	147.66
Feb-20	6.76	12.2	116.52	Feb-24	8.31	-3.0	143.29
Mar-20	6.20	-8.2	106.95	Mar-24	8.00	-3.7	137.96
Apr-20	5.86	-5.5	101.09	Apr-24	7.70	-3.8	132.68
May-20	5.26	-10.4	90.58	May-24	7.83	1.7	134.89
Jun-20	5.45	3.7	93.95	Jun-24	8.05	2.9	138.74
Jul-20	5.44	-0.2	93.74	Jul-24	7.56	-6.1	130.31
Aug-20	5.41	-0.4	93.34	Aug-24	7.08	-6.4	122.03
Sep-20	5.58	3.0	96.14	Sep-24	7.09	0.1	122.21
Oct-20	4.97	-10.8	85.71	Oct-24	6.75	-4.7	116.41
Nov-20	4.58	-7.9	78.95	Nov-24	6.33	-6.3	109.10
Dec-20	4.32	-5.8	74.39	Dec-24	5.36	-15.4	92.32
Jan-21	4.26	-1.3	73.39	Jan-25	6.24	16.5	107.54
Feb-21	5.60	31.5	96.50	Feb-25	8.40	34.7	144.83
Mar-21	6.93	23.8	119.49	Mar-25	8.15	-3.0	140.52
Apr-21	6.20	-10.5	106.96	Apr-25	7.45	-8.6	128.42
May-21	5.76	-7.2	99.22	May-25	7.69	3.2	132.52
Jun-21	5.87	2.0	101.22	Jun-25	8.01	4.2	138.03
Jul-21	5.09	-13.4	87.70				
Aug-21	5.09	0.1	87.81				
Sep-21	5.31	4.2	91.53				
Oct-21	4.49	-15.5	77.36				
Nov-21	4.28	-4.6	73.80				
Dec-21	4.54	6.0	78.26				

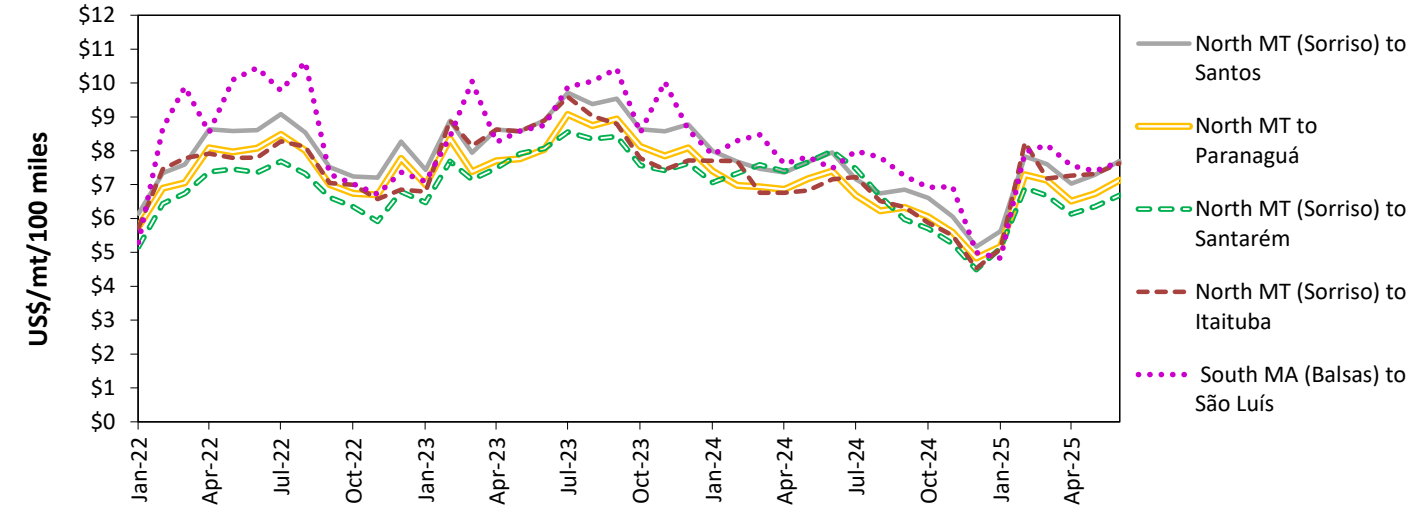
Note: Weighted average is calculated from production-based shares to weigh high-volume routes more heavily than low-volume routes. The share associated with each route is used to define the weight of a given route's freight price in the composition of the monthly weighted export truck freight index.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

Figure 3. Truck rates for selected southern Brazilian soybean export transportation routes, 2022-25



Note: mt = metric ton. PR = Paraná, MT= Mato Grosso, and MS = Mato Grosso do Sul.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

Figure 4. Truck rates for selected north, south, and northeastern Brazilian soybean export transportation routes, 2022-25



Note: mt = metric ton. MT= Mato Grosso and MA = Maranhão.
Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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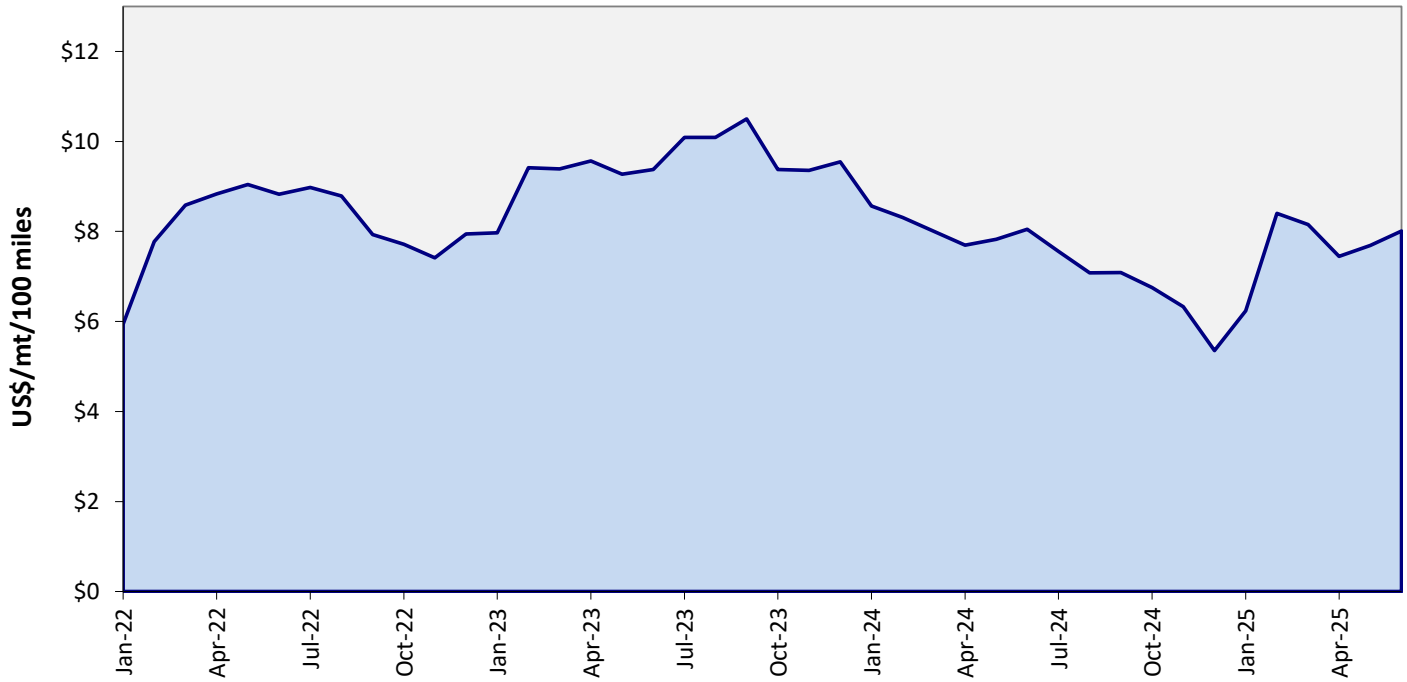
Figure 5. Brazilian soybean export truck transportation weighted average prices, 2022-25



Note: mt = metric ton.

Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

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Table 9. Quarterly ocean freight rates for shipping soybeans from selected Brazilian ports to Germany and China (US$/metric ton)

Port	Destination	1st qtr. 2020	2nd qtr. 2020	3rd qtr. 2020	4th qtr. 2020	Average 2020
Santos	Germany (Hamburg)	29.25	20.50	24.00	25.25	24.75
Paranaguá	Germany (Hamburg)	30.00	21.50	25.00	25.35	25.46
Rio Grande	Germany (Hamburg)	29.50	20.75	24.50	25.75	25.13
Santarém	Germany (Hamburg)	25.00	16.00	20.75	22.00	20.94
São Luís	Germany (Hamburg)	22.25	17.50	25.00	26.30	22.76
Barcarena	Germany (Hamburg)	24.00	15.00	20.50	21.75	20.31
Santos	China (Shanghai)	35.50	27.08	31.33	31.67	31.40
Paranaguá	China (Shanghai)	37.25	28.83	33.08	33.42	33.15
Rio Grande	China (Shanghai)	37.00	28.58	32.83	33.17	32.90
Santarém	China (Shanghai)	36.50	28.08	34.83	35.21	33.66
São Luís	China (Shanghai)	36.75	28.33	35.33	35.67	34.02
Barcarena	China (Shanghai)	38.50	28.33	36.33	36.67	34.96
Port	**Destination**	**1st qtr. 2021**	**2nd qtr. 2021**	**3rd qtr. 2021**	**4th qtr. 2021**	**Average 2021**
Santos	Germany (Hamburg)	31.25	42.70	54.00	52.50	45.11
Paranaguá	Germany (Hamburg)	31.00	41.90	53.00	51.50	44.35
Rio Grande	Germany (Hamburg)	32.00	43.80	55.50	53.80	46.28
Santarém	Germany (Hamburg)	28.65	40.00	50.60	49.10	42.09
São Luís	Germany (Hamburg)	33.25	45.90	58.00	56.30	48.36
Barcarena	Germany (Hamburg)	28.10	38.90	49.20	47.80	41.00
Santos	China (Shanghai)	37.00	50.60	64.00	62.00	53.40
Paranaguá	China (Shanghai)	38.75	52.40	66.00	64.00	55.29
Rio Grande	China (Shanghai)	37.25	51.00	64.75	62.75	53.94
Santarém	China (Shanghai)	40.54	55.60	67.50	65.60	57.31
São Luís	China (Shanghai)	41.00	56.60	68.00	66.00	57.90
Barcarena	China (Shanghai)	42.00	58.20	70.00	68.00	59.55
Port	**Destination**	**1st qtr. 2022**	**2nd qtr. 2022**	**3rd qtr. 2022**	**4th qtr. 2022**	**Average 2022**
Santos	Germany (Hamburg)	52.70	55.85	42.60	42.20	48.34
Paranaguá	Germany (Hamburg)	51.50	54.60	41.60	41.20	47.23
Rio Grande	Germany (Hamburg)	54.00	57.20	43.60	43.10	49.48
Santarém	Germany (Hamburg)	49.10	52.00	46.00	39.60	46.68
São Luís	Germany (Hamburg)	56.50	60.00	40.00	39.80	49.08
Barcarena	Germany (Hamburg)	48.00	50.80	39.70	39.20	44.43
Santos	China (Shanghai)	62.00	65.75	48.70	47.70	56.04
Paranaguá	China (Shanghai)	64.00	67.75	49.00	48.60	57.34
Rio Grande	China (Shanghai)	62.75	66.50	49.00	48.40	56.66
Santarém	China (Shanghai)	66.00	69.90	56.00	54.80	61.68
São Luís	China (Shanghai)	66.20	70.00	56.00	55.00	61.80
Barcarena	China (Shanghai)	68.00	72.00	55.40	55.50	62.73

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Port	Destination	1st qtr. 2023	2nd qtr. 2023	3rd qtr. 2023	4th qtr. 2023	Average 2023
Santos	Germany (Hamburg)	31.65	33.20	35.00	33.00	33.21
Paranaguá	Germany (Hamburg)	31.00	32.50	34.20	32.10	32.45
Rio Grande	Germany (Hamburg)	32.50	34.20	36.00	33.80	34.13
Santarém	Germany (Hamburg)	30.00	31.50	33.00	31.00	31.38
São Luís	Germany (Hamburg)	34.50	36.30	38.20	36.00	36.25
Barcarena	Germany (Hamburg)	29.40	31.00	32.50	30.50	30.85
Santos	China (Shanghai)	33.50	35.20	37.00	35.00	35.18
Paranaguá	China (Shanghai)	35.00	36.70	37.50	35.50	36.18
Rio Grande	China (Shanghai)	34.00	35.70	38.50	35.50	35.93
Santarém	China (Shanghai)	37.50	39.40	41.40	39.00	39.33
São Luís	China (Shanghai)	38.00	40.00	42.00	39.50	39.88
Barcarena	China (Shanghai)	38.25	40.20	42.20	39.60	40.06
Port	**Destination**	**1st qtr. 2024**	**2nd qtr. 2024**	**3rd qtr. 2024**	**4th qtr. 2024**	**Average 2024**
Santos	Germany (Hamburg)	32.60	31.30	33.80	32.20	32.48
Paranaguá	Germany (Hamburg)	32.20	31.00	33.50	32.10	32.20
Rio Grande	Germany (Hamburg)	33.40	32.00	34.60	33.00	33.25
Santarém	Germany (Hamburg)	30.40	29.20	31.20	29.70	30.13
São Luís	Germany (Hamburg)	35.20	33.80	36.10	34.50	34.90
Barcarena	Germany (Hamburg)	29.90	28.70	30.60	29.10	29.58
Santos	China (Shanghai)	34.70	33.30	36.00	34.40	34.60
Paranaguá	China (Shanghai)	36.20	34.80	37.50	35.80	36.08
Rio Grande	China (Shanghai)	35.20	33.80	36.50	34.70	35.05
Santarém	China (Shanghai)	38.00	36.50	39.00	37.30	37.70
São Luís	China (Shanghai)	38.30	37.10	39.50	37.80	38.18
Barcarena	China (Shanghai)	38.50	37.40	39.75	38.00	38.41
Port	**Destination**	**1st qtr. 2025**	**2nd qtr. 2025**	**3rd qtr. 2025**	**4th qtr. 202**	**Average 2025**
Santos	Germany (Hamburg)	33.90	34.75			34.33
Paranaguá	Germany (Hamburg)	33.60	34.50			34.05
Rio Grande	Germany (Hamburg)	34.60	35.50			35.05
Santarém	Germany (Hamburg)	31.30	32.10			31.70
São Luís	Germany (Hamburg)	36.20	37.00			36.60
Barcarena	Germany (Hamburg)	30.40	31.20			30.80
Santos	China (Shanghai)	36.00	37.00			36.50
Paranagua	China (Shanghai)	37.50	38.50			38.00
Rio Grande	China (Shanghai)	36.50	37.50			37.00
Santarém	China (Shanghai)	39.00	40.00			39.50
São Luís	China (Shanghai)	39.65	40.50			40.08
Barcarena	China (Shanghai)	39.75	40.75			40.25

Notes: The rates correspond to the average actual values negotiated between shippers and carriers and weighted according to the magnitude of the shipped volume. qtr. = quarter.

Source: University of São Paulo, Escola Superior de Agricultura "Luiz de Queiroz," Brazil (ESALQ/ USP) and USDA, Agricultural Marketing Service.

Brazil Soybean Transportation

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SUBSCRIPTION INFORMATION

Send relevant information to GTRContactUs@usda.gov for an electronic copy.

RELATED WEBSITES

- Soybean Transportation Guide
- Prior Articles: Brazil Soybean Transportation
- Related Articles: *Grain Transportation Report*: May 29, 2025 (PDF)

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