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# Grain Transportation Report

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[www.ams.usda.gov/GTR](http://www.ams.usda.gov/GTR)

**Grain Rail Carloads Grew Faster Than Other Categories in 2024.** According to the Association of American Railroads' (AAR) latest [Rail Industry Overview](#), U.S. Class I grain carloads totaled 1.07 million in 2024—nearly 84,000 carloads higher than 2023 levels. (That total excluded the U.S. operations of Canadian National Railway and Canadian Pacific Kansas City.) The year-to-year growth for this category was the highest of all the carload categories tracked by AAR.

Despite the rise of grain carloads (and despite the rise of other carload-categories, such as chemicals), total rail carloads fell, mainly because of declining coal shipments. From 2023 to 2024, coal carloads were down 13.6 percent, and 2024 had the lowest coal volume (2.94 million carloads) of any year since AAR began keeping records in 1988.

According to AAR, the year-to-year rise in grain carloads owed to higher grain exports. Despite the significant year-to-year rise, the second-lowest grain carloads since 2019 were recorded in 2024 (the lowest being in 2023). Last September, the Surface Transportation Board held a hearing to address the issue of declining carloads in the freight rail industry ([Grain Transportation Report \(GTR\), September 19, 2024, third highlight](#)).

**CARB Cancels Request To Waive EPA Regulations for Trucking and Rail.** The California Air Resources Board (CARB) [recently informed](#) the U.S. Environmental Protection Agency (EPA) that CARB would withdraw its [Clean Air Act waiver](#) requests involving zero-emissions rules for trucks and locomotives.

The waivers include CARB's In-Use Locomotive Regulation (IULR) for rail and Advanced Clean Fleet Rule (ACF) for trucks.

Had IULR been enacted, it would have banned the use of locomotives 23 years or older beginning in 2030 and established zero-emission requirements for new locomotives operating in California. Last year, EPA sought comments from interested parties on whether to grant CARB's waiver request, and the agency received comments from stakeholders, including agricultural associations ([GTR, May 9, 2024](#)).

CARB's ACF rule would have required truck fleets to contain a minimum share of electric vehicles. Also, ACF would have required California's ports to use only zero-emission vehicles.

**CHS Receives Exclusive Contract To Ship Fertilizer Through St. Louis Barge Terminal.** As [announced](#) on January 3, a new services agreement with Ingram Barge Company grants CHS Inc. exclusive rights to ship fertilizer through Ingram's Municipal River Terminal in St. Louis, MO.

According to CHS, the cooperative will now be able to "load multiproduct unit rail shipments of commodity fertilizers from the St. Louis Municipal River Terminal and more efficiently deliver fertilizers to customers and owners." The St. Louis barge facility is connected to all six Class I railroads through a switching railroad, the Terminal Railroad Association of St. Louis.

Fertilizer shipments arrive in St. Louis by barge, having traveled up the Mississippi River from the New Orleans, LA, customs district—the top gateway for fertilizer imports into the United States. From St. Louis, fertilizer can be shipped by rail to rail-served warehouses across the Nation. For additional

information on fertilizer transportation, see the [Fertilizer Transportation Dashboard](#) on AgTransport.

**Iowa Extends Weight-Limit Suspension and Waives Hours-of-Service Rules for Hauling Fuel.** Iowa has [reextended](#), through February 6, its emergency proclamation suspending normal limits on overweight loads for transporting corn, soybeans, hay, straw, silage, stover, fertilizer (dry, liquid and gas), and manure (dry and liquid).

The decree applies to agricultural loads transported on all Iowa highways (except interstates) and loads less than 90,000 pounds gross weight that do not exceed either the State's maximum axle weight limits by more than 12.5 percent or Federal law's maximum axle weight limit of 20,000 pounds. In addition, vehicles with overweight loads must comply with posted weight limits on roads and bridges.

Also, effective through February 6, [another Iowa emergency proclamation](#) waives hours-of-service regulations for crews and drivers delivering propane, diesel, natural gas, and other fuels used for agricultural purposes. The proclamation was intended to address the high demand for petroleum products throughout the Midwest, including the need for motor and heating fuels to continue to process and dry harvested crops.

For additional transportation news related to grain and other agricultural products, see the [Transportation Updates and Regulatory News](#) page on AgTransport. A [dataset of all news entries since January 2023](#) is also available on AgTransport.



## Export Sales

For the week ending January 9, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 36.67 million metric tons (mmt), down 3 percent from last week and up 4 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.02 mmt, up 130 percent from last week. Net **soybean export sales** were 0.57 mmt, up 160 percent from last week. Net **wheat export sales** for MY 2024/25 were .51 mmt, up 361 percent from last week.

## Rail

U.S. Class I railroads originated 25,602 **grain carloads** during the week ending January 11. This was a 5-percent increase from the previous week, 11 percent more than last year, and 5 percent fewer than the 3-year average.

Average January **shuttle secondary railcar bids/offers** (per car) were \$13 below tariff for the week ending January 16. This was \$100 more than last week. Average non-shuttle secondary railcar bids/offers per car were \$250 above tariff. This was \$125 more than last week.

Average February shuttle secondary railcar bids/offers (per car) were \$106 above tariff for the week ending January 16. This was \$144 more than last week and \$156 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$127 above tariff. This was \$15 more than last week and \$210 lower than this week last year.

## Barge

For the week ending January 18, **barged grain movements** totaled 428,300 tons. This was 5 percent less than the previous week and 28 percent more than the same period last year.

For the week ending January 18, 284 grain barges **moved down river**—9 fewer than last week. There were 911 grain barges **unloaded** in the New Orleans region, 9 percent more than last week.

## Ocean

For the week ending January 16, 30 **oceangoing grain vessels** were loaded in the Gulf—14 percent fewer than the same period last year. Within the next 10 days (starting January 17), 45 vessels were expected to be loaded—17 percent fewer than the same period last year.

As of January 16, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$45.75, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$26.25 per mt, up 1 percent from the previous week.

## Fuel

For the week ending January 20, the U.S. average **diesel price** increased 11.3 cents from the previous week, to \$3.715 per gallon—12.3 cents below the same week last year.



# Grain Transportation Update: Demand Remains Strong

Following the pattern of third quarter 2024 ([Grain Transportation Report \(GTR\), October 24, 2024](#)), demand for grain transportation remained strong in the fourth quarter—buoyed by strong exports for corn, soybeans, and wheat. Rail and barge volumes in the fourth quarter were both up from the prior 3-year average.<sup>1</sup> Additionally, grain vessel loading activity increased in the U.S. Gulf.

The transportation system was able to meet this demand. Rail service was generally adequate for most shippers, and barge operators were generally able to accommodate periods of low water. However, winter weather has been a challenge across modes at the start of 2025.

## USDA Pares Back Fall Harvest Estimates; Disappearance Shows Strong Transport Demand

According to USDA's January [World Agricultural Supply and Demand Estimates](#) (WASDE) report, the Nation's corn and soybean harvests were smaller than previously estimated, as yields for these crops were reduced from December's projections.

Largely reflecting a 3.8-bushel per acre decline in yield from USDA's December projection, marketing year (MY) 2024/25 corn production is now estimated at 14.9 billion bushels (bbu)—down 276 million bushels (mbu) from the December projection. Likewise, a 1.0-bushel

per acre drop in soybean yield (from the December projection) lowered the MY 2024/25 soybean production estimate to 4.4 bbu—down 95 mbu from the December projection.

Total demand for grain transportation was strong from September through November—as shown in the latest [Grain Stocks](#) report. From September to November, total grain (i.e., corn, soybeans, and wheat) “disappearance” was 5 percent above last year and 3 percent above average.<sup>2</sup> Corn disappearance was up just 2 percent from average, while soybean and wheat disappearance rose more significantly (6 percent and 5 percent, respectively).

Following these two reports, grain markets (and especially corn) rallied—triggering a [spate of sales from U.S. farmers](#).

## Rail Update: Volumes Rise Modestly; Service Is Generally Adequate

In fourth quarter 2024, rail grain carloads were up 5 percent from the same period in 2023 and up 2 percent from average ([GTR fig. 3](#)). Fourth quarter grain carloads for Norfolk Southern Railway were 23 percent above average—likely reflecting higher demand for feed grains in the Southeast following a poor harvest in that region.

Over 2024, the six Class I railroads originated 1.3 million grain carloads. While this amount was 8 percent above 2023 levels, it was 1 percent below average (see this week's [first highlight](#)).

Aside from a brief late-November embargo on dry beans through Canadian Pacific Kansas City's (CPKC) crossing in Laredo, TX ([GTR, January 2, 2025](#)), rail service for grain exports to Mexico improved, as exemplified by average “shuttle turns” into Mexico—the number of (round) trips completed per month by a single shuttle train.

For example, BNSF Railway's (BNSF) [shuttle turns](#) to Mexico rose from 0.9 trips per month in October to 1.5 trips per month in December. [Inspections](#) of grain destined to Mexico, by rail, were 4.7 million metric tons in the fourth quarter—up 7 percent from fourth quarter 2023 and up 15 percent from average.

Secondary market values for shuttle trains have fallen significantly since peaking in October. For the week ending September 26, BNSF shuttles for delivery in October averaged \$1,550 per car. Likewise, Union Pacific Railroad (UP) shuttles averaged \$2,000 per car. Following this peak, secondary shuttle values fell for the rest of the quarter.

By January 2, BNSF shuttles for delivery in January averaged \$300 per car, and UP shuttles averaged -\$287.50 per car (indicating that the

1 Unless otherwise noted, “average” (as referring to a historical average) specifically denotes the “prior 3-year average.”

2 “Disappearance” refers to the drawdown in National grain supplies from September 1 (September 1 grain stocks plus new production of corn and soybeans) to December 1.

supply of UP shuttles exceeded demand). The fact that BNSF shuttle values have not fallen as much as those of UP in recent weeks likely reflects BNSF's decision to reduce its shuttle fleet last year, which reduced the firm's shuttle availability ([GTR, November 21, 2024](#)).

Rail service across the Nation was generally adequate in fourth quarter 2024—with the notable exception of CPKC. On the legacy Kansas City Southern Railway (KCS) network, origin dwell times for unit grain trains averaged 55 hours for the week ending November 22. On the legacy Canadian Pacific Railway (CP) network, unfilled manifest grain car orders totaled nearly 2,000 for the week ending November 1.

CPKC's metrics have since improved. For the last week of December 2024, average origin dwell time on the KCS network averaged just 15 hours, and unfilled manifest grain car orders on the CP network totaled 3.

In recent weeks, railroads have dealt with extreme winter weather—first, [winter storm Blair](#) (from the Rockies to the Mid-Atlantic) and then a [polar vortex-related Arctic blast](#) (affecting most of the Nation). Such events can reduce rail velocity and/or increase dwell times ([GTR table 4a](#) and [4b](#)).

### **Barge Update: Volumes Rise and Spot Rates Minimally Increase**

For fourth quarter 2024, downbound barged shipments of grain through the locks on the Mississippi River System (MRS) were up 16 percent from last year, and up 8 percent from

the average. In 2024, 32 percent of all grain that passed through the locks shipped during the fourth quarter—up from 31 percent last year and up 28 percent from average ([GTR table 10](#)).

Despite draft and tow restrictions due to low water levels for most of the quarter, for the week ending December 29, 945,000 tons of grain moved through the locks—the largest weekly amount since the week ending May 28, 2022 ([GTR, January 2, 2025, first highlight](#)).

Spot rates tend to fall in the fourth quarter as barge demand falls with the end of harvest. The fourth quarter 2024 average barge rate at St. Louis, MO, (\$17.94 per ton) was 12 percent higher than last year (\$16.08 per ton) and 21 percent less than the 3-year average (\$22.76 per ton). Increased barge demand from higher export sales raised barge rates above the levels of last year when there were less export sales ([GTR table 9](#)).

In the Upper Mississippi River, Ohio River, and Illinois River, extreme cold and ice since mid-December have slowed barge movements and raised spot rates. [Closures](#) of Lock 25 and the main locks of Locks 26 and 27 have further slowed barge movements through these portions of the MRS. (The auxiliary locks of Locks 26 and 27 will remain open.)

Along the Columbia-Snake River System (CSRS), 973,900 tons of wheat moved through the locks in fourth quarter 2024—up 9 percent from fourth quarter 2023 ([GTR table 12](#)). In fourth quarter 2024, barge rates along the CSRS were down 4 percent from fourth quarter 2023 ([GTR table 11](#)).

### **Ocean Update: Dry Bulk Freight Rates Fall Despite Rise in Grain Vessel Loading**

In fourth quarter 2024, ocean freight rates for shipping bulk grain were down from the previous quarter and from fourth quarter 2023. The rates for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan averaged \$49.74 in fourth quarter 2024—down 14 percent from the previous quarter, down 16 percent from a year ago, and 17 percent below the prior 4-year average ([GTR fig. 20](#)).

The rate from the Pacific Northwest averaged \$28.96 per mt—down 6 percent from the previous quarter, down 6 percent from a year ago, and 11 percent below the prior 4-year average. Meanwhile, in the U.S. Gulf, grain vessel loading activity increased, with an average of 37 oceangoing vessels at berth per week in the fourth quarter, compared to an average of 24 vessels in the previous three quarters combined and an average of 27 vessels in the same period in 2023 ([GTR fig. 19](#)).

Despite increased vessel loading activity, the drop in the ocean freight rates may have reflected ample vessel supply, as well as insufficient cargo (due to the holiday season) and slow global economic growth. In addition, since last summer, increased transits of the Panama Canal have also pushed down ocean freight rates.



Ocean freight rates may remain subdued through first quarter 2025 because of seasonally low demand, including the expected lull in trade ahead of the Chinese Lunar New Year celebration (which begins January 29, 2025).

### Trucking Update: Diesel Prices Fall in Fourth Quarter

Unlike the nearly continuous decline in diesel prices during the third quarter—in the fourth quarter, diesel prices fluctuated, rising seven times and falling six times ([GTR fig. 16](#)).

Fourth-quarter 2024 U.S. diesel prices averaged \$3.53 per gallon, which was 16 cents below third quarter 2024 and 68 cents below fourth quarter 2023. In the last 4 weeks (from the week ending December 30 to January 20), the national diesel price has increased 21.2 cents, with the January 20 price the highest since August 5, when the price was \$3.755/gallon. The recent price increase follows new U.S. sanctions on Russian oil shipments.

The Energy Information Administration's January [Short-Term Energy Outlook](#) projects oil prices will remain fairly low over much of 2025 and 2026, as global oil production outpaces global oil demand. So far, for first quarter 2025, the national average diesel price is projected at \$3.57 per gallon, up 4 cents from fourth quarter 2024. U.S. diesel prices are projected to average \$3.66 per gallon in 2025, down 10 cents from 2024's average price.

### MY 2024/25 Export Projections: Rise Expected for Three Major Grains

This month, U.S. corn exports for MY 2024/25 were revised downward 0.70 mmt from the December WASDE projection, because of lower domestic production. Still, in MY 2024/25, U.S. corn exports are projected at 62.2 million tons, which if realized, will be the third-highest volume on record. This sustained strength owes to robust domestic production, competitive prices, and weak Brazilian production. (U.S. corn is currently the cheapest in the world.)

As of January 9, unshipped corn exports, which represent future transportation demand, were 30 percent above the same time last year ([GTR table 14](#)). If drought persists in Mexico as expected, then Mexico's MY 2024/25 purchases of U.S. corn are projected to resemble those of MY 2023/24, when Mexico was the largest buyer of U.S. corn. Competitive U.S. prices have also attracted increased purchases by Colombia. As of January 9, total commitments to Colombia were 4.0 million tons, the highest level in history for this point in the year.

Since the December WASDE, U.S. soybean prices have risen, while Brazilian prices have fallen below U.S. prices for the first time since July 2024, because of favorable rains and the Brazilian real's weakening against the U.S. dollar. For U.S. soybeans, more than half of the

entire shipping season's volumes typically move during a 4-month peak from September to December.

Once South America's soybean shipping season begins in January, demand declines significantly for U.S. soybeans, which are more expensive than South America's. As of January 9, for MY 2024/25, 63 percent of U.S. projected soybean exports had already shipped—up from 55 percent for the same time last year ([GTR table 14](#)).

As of January 9, with just 5 months before the end of wheat's marketing year, 54 percent of WASDE's projected wheat exports had shipped—1 percent ahead of the same time last year. Also, as of January 9, unshipped U.S. wheat exports totaled 5.0 mmt—down 19 percent from last year and down 1 percent from average ([GTR table 14](#)).

The drop signals slowing sales and lower transportation demand, reflecting the fact that U.S. prices are much higher (and less competitive) than those of Russia, EU, and Argentina. However, from February 15 to June 30, 2025, the grain export quota of Russia, the world's top wheat exporter, will be set at 10.6 million tons. The lowest in 5 years, this quota will severely reduce Russia's wheat export shipments.

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Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

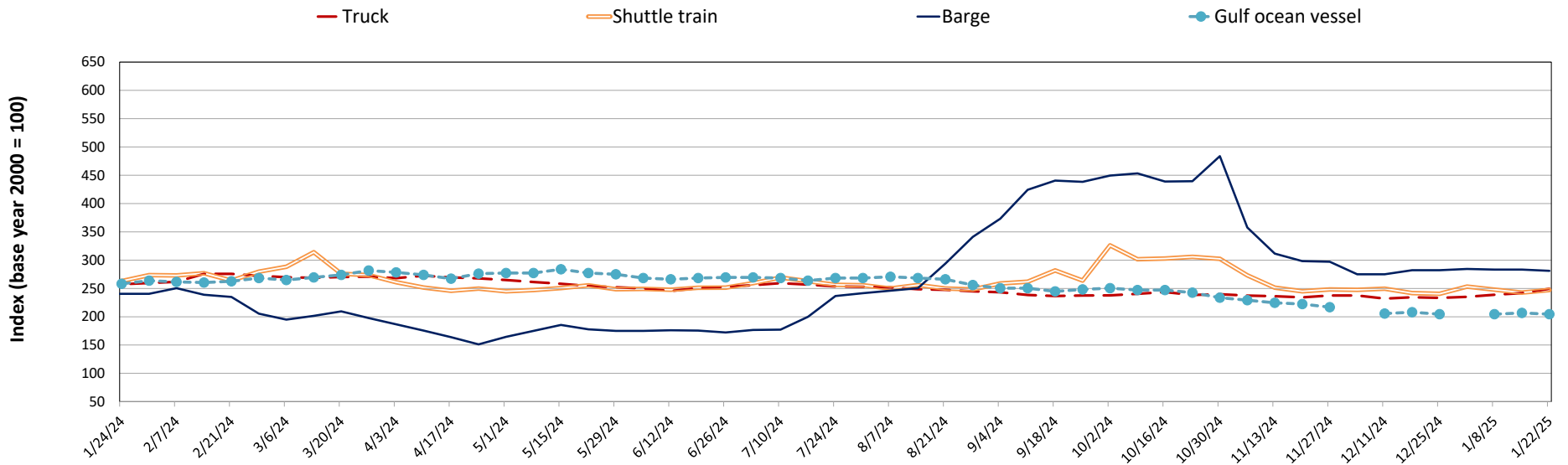
**Table 1. Grain transport cost indicators**

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
01/22/25	249	340	247	281	205	186
01/15/25	242	333	243	283	207	184
01/24/24	258	340	263	241	258	216

Note: Indicator: 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.

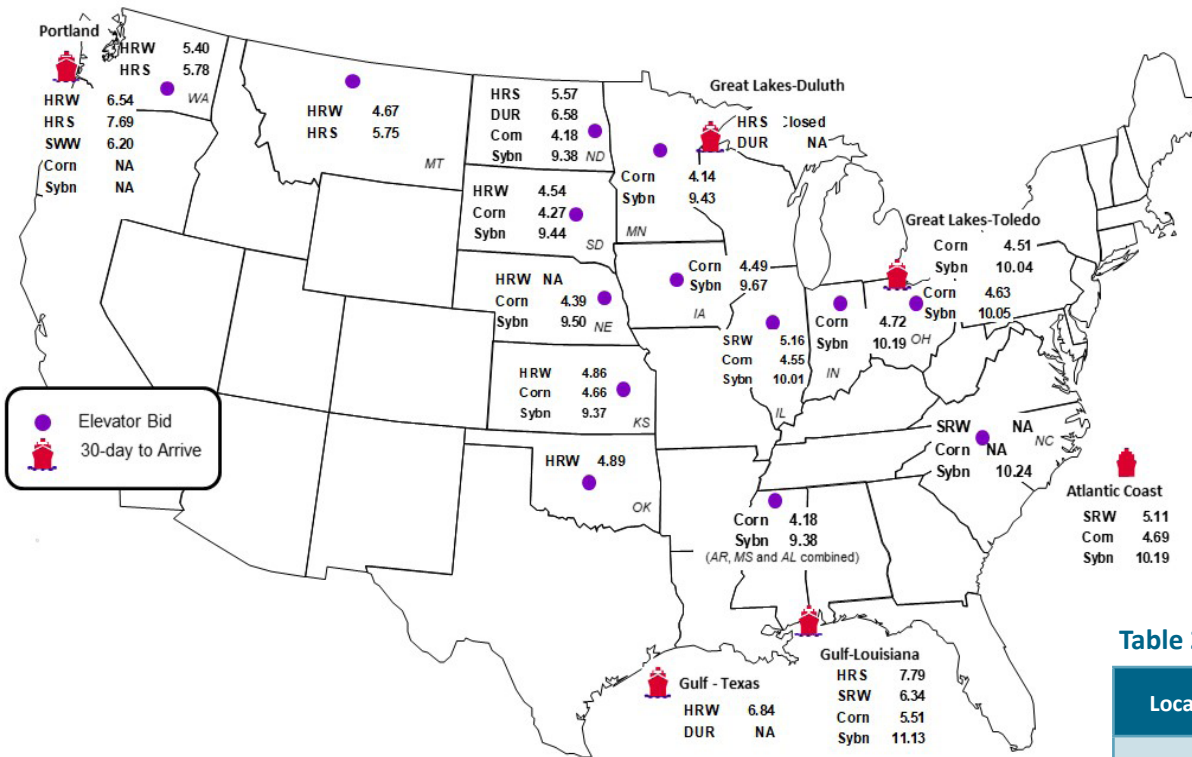
**Figure 1. Grain transportation cost indicators as of week ending 1/22/25**



Source: USDA, Agricultural Marketing Service.

**Figure 2. Grain bid summary**

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.



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans  
 Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans  
 Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.  
 Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

**Table 2a. Market update: U.S. origins to export position price spreads (\$/bushel)**

Commodity	Origin-destination	1/17/2024	1/10/2024
Corn	IL-Gulf	-0.96	-0.94
Corn	NE-Gulf	-1.12	-1.11
Soybean	IA-Gulf	-1.46	-1.50
HRW	KS-Gulf	-1.98	-2.00
HRS	ND-Portland	-2.12	-2.16

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.  
 Source: USDA, Agricultural Marketing Service.

**Table 2b. Futures**

Location	Grain	Month	1/17/2025	Week ago 1/10/2025	Year ago 1/19/2024
Kansas City	Wheat	Mar	5.616	5.546	6.040
Minneapolis	Wheat	Mar	5.834	5.842	6.954
Chicago	Wheat	Mar	5.522	5.362	5.890
Chicago	Corn	Mar	4.870	4.730	4.456
Chicago	Soybean	Mar	10.554	10.272	12.134

Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.



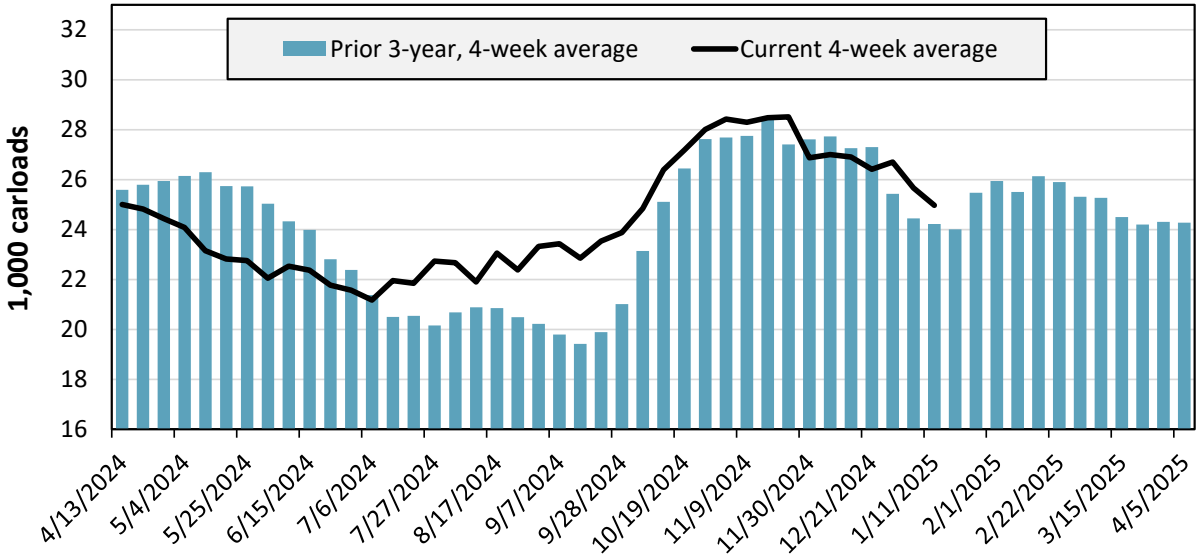
**Table 3. Class I rail carrier grain car bulletin (grain carloads originated)**

For the week ending: 1/11/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,678	3,368	11,015	5,063	2,820	1,658	25,602
This week last year	2,174	3,139	8,990	4,473	2,863	1,489	23,128
2025 YTD	3,452	6,144	21,982	10,494	5,037	2,979	50,088
2024 YTD	4,267	6,011	20,394	9,771	6,062	2,619	49,124
2025 YTD as % of 2024 YTD	81	102	108	107	83	114	102
Last 4 weeks as % of 2024	91	115	99	118	101	131	106
Last 4 weeks as % of 3-yr. avg.	90	120	99	112	100	92	103
Total 2024	87,911	143,353	557,544	279,532	142,383	58,512	1,269,235

Note: The last 4-week percentages compare the last 4 weeks of this year to the closest 4 weeks of last year, and to the average across the prior 3 years. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.

Source: Surface Transportation Board.

**Figure 3. Total weekly U.S. Class I railroad grain carloads**



For the 4 weeks ending January 11, grain carloads were down 3 percent from the previous week, up 6 percent from last year, and up 3 percent from the 3-year average.

Source: Surface Transportation Board.

**Table 4a. Rail service metrics—grain unit train origin dwell times and train speeds**

For the week ending: 1/10/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	54.2	22.2	30.0	24.1	7.6	25.2	36.1	28.5
	Average over last 4 weeks	35.9	26.9	26.9	17.4	7.4	23.2	18.7	22.3
	Average of same 4 weeks last year	31.7	28.2	22.0	16.3	7.1	24.9	11.0	20.1
Grain unit train speeds (miles per hour)	This week	23.7	20.9	26.1	24.0	25.7	21.2	23.4	23.6
	Average over last 4 weeks	23.4	20.5	26.5	23.3	25.7	20.1	23.5	23.3
	Average of same 4 weeks last year	23.9	16.4	26.2	24.5	25.4	24.1	27.5	24.0

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).

These service metrics are published weekly on the [Surface Transportation Board's website](#) and on [AgTransport](#). For more information on each service metric, see [49 CFR § 1250.2](#).

Source: Surface Transportation Board.

**Table 4b. Rail service metrics—unfilled grain car orders and delays**

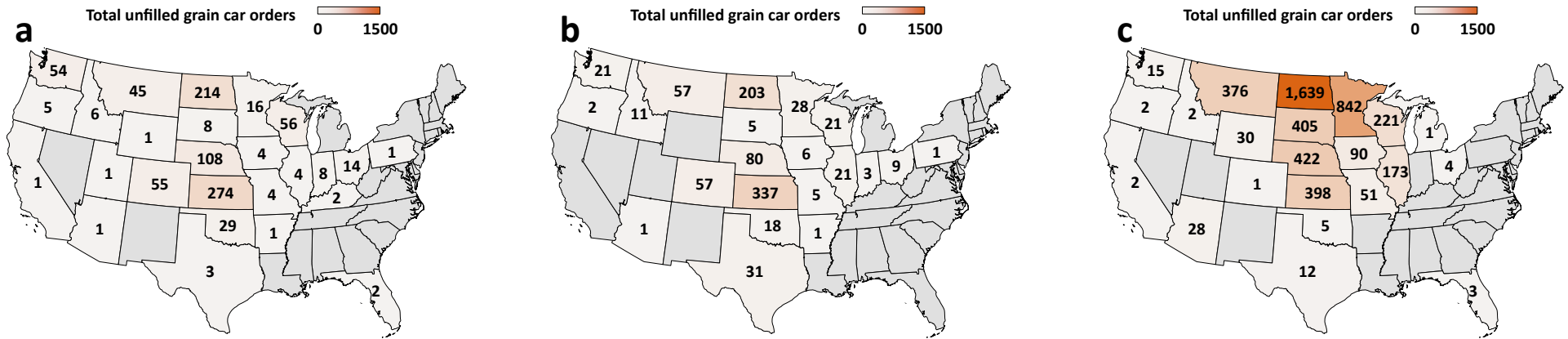
For the week ending: 1/10/2025		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Empty grain cars not moved in over 48 hours (number)	This week	25	4	368	106	2	55	68	628
	Average over last 4 weeks	58	6	419	96	5	52	60	697
	Average of same 4 weeks last year	42	15	521	85	5	57	50	775
Loaded grain cars not moved in over 48 hours (number)	This week	64	215	756	124	3	124	3	1,289
	Average over last 4 weeks	76	241	742	118	3	129	6	1,316
	Average of same 4 weeks last year	61	348	1,068	115	5	146	21	1,764
Grain unit trains held (number)	This week	0	1	24	9	0	0	3	38
	Average over last 4 weeks	0	1	20	7	0	1	3	32
	Average of same 4 weeks last year	0	5	12	5	0	3	5	31
Unfilled manifest grain car orders (number)	This week	22	5	424	376	0	90	25	942
	Average over last 4 weeks	9	6	381	472	0	51	31	949
	Average of same 4 weeks last year	7	1	4,344	228	0	138	57	4,775

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).

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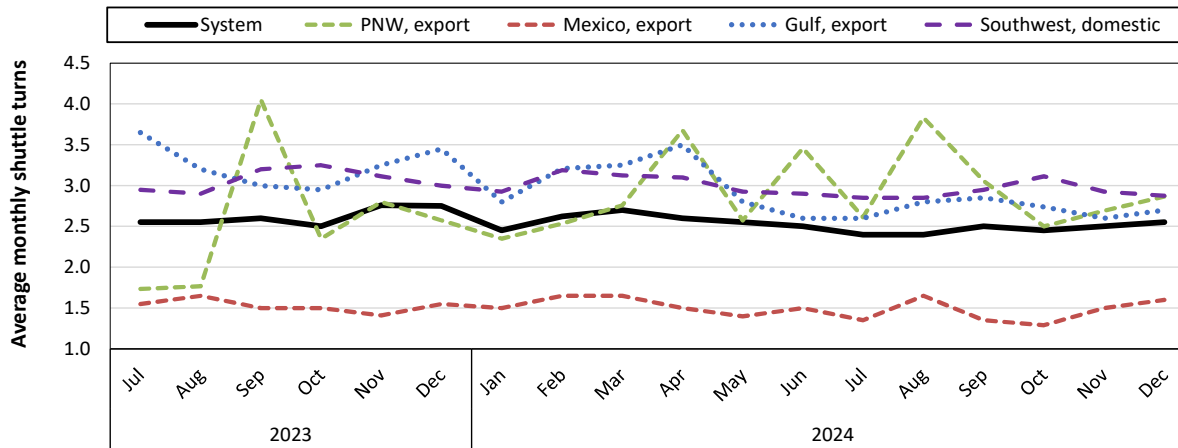
Source: Surface Transportation Board.

**Figure 4. Unfilled manifest grain car orders by State for the week ending 1/10/2025 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)**



Note: Unfilled grain car orders for Kansas City Southern Railway (KCS) are not included because those metrics are not reported at the State level.  
 Source: Surface Transportation Board. Map credits: Bing, GeoNames, Microsoft, TomTom.

**Figure 5. Average monthly turns for grain shuttle trains, by region**



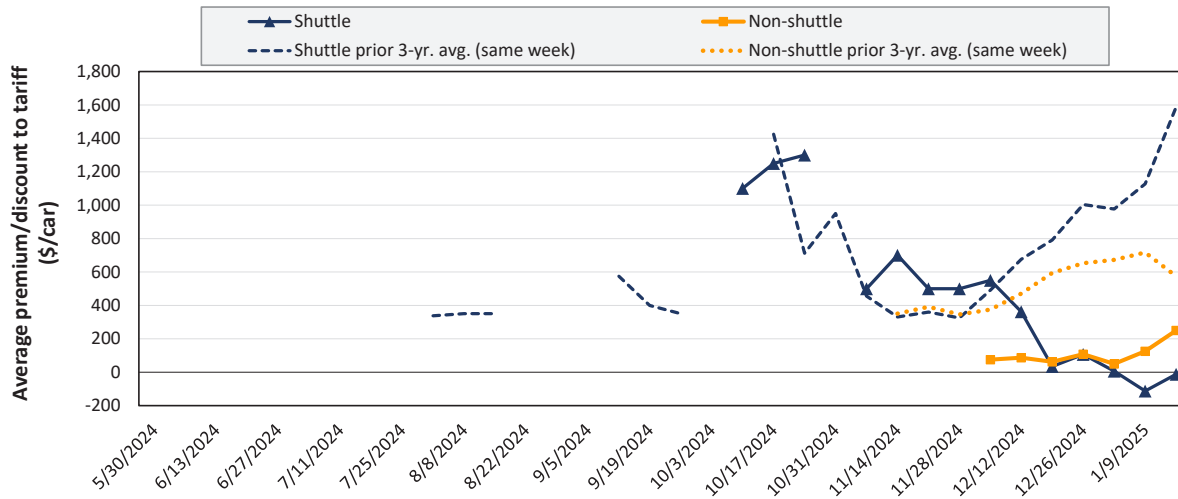
Average monthly systemwide grain shuttle turns for December 2024 were 2.55. By destination region, average monthly grain shuttle turns were 2.87 to PNW, 1.6 to Mexico, 2.7 to the Gulf, and 2.88 to the Southwest.

Note: A “shuttle turn” refers to the number of trips completed per month by a single train. Numbers reflect averages of the three railroads with a shuttle train program: BNSF Railway, Union Pacific Railroad; and Canadian Pacific Kansas City (CPKC). CPKC only reports values for the Pacific Northwest (PNW). Regions are not standardized and vary across railroads. “Southwest” refers to domestic destinations, which include: “West Texas, Arkansas/Texas, California/Arizona, and California.”  
 Source: Surface Transportation Board.



Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., one year). This ordering system is referred to as the “primary market.” Once grain shippers acquire guaranteed freight on the primary market, they can trade that freight with other shippers through a broker. These transactions are referred to as the “secondary market.” Secondary rail values are indicators of rail service quality and demand/supply. The values published herein are market indicators only and do not represent guaranteed prices.

**Figure 6. Secondary market bids/offers for railcars to be delivered in January 2025**



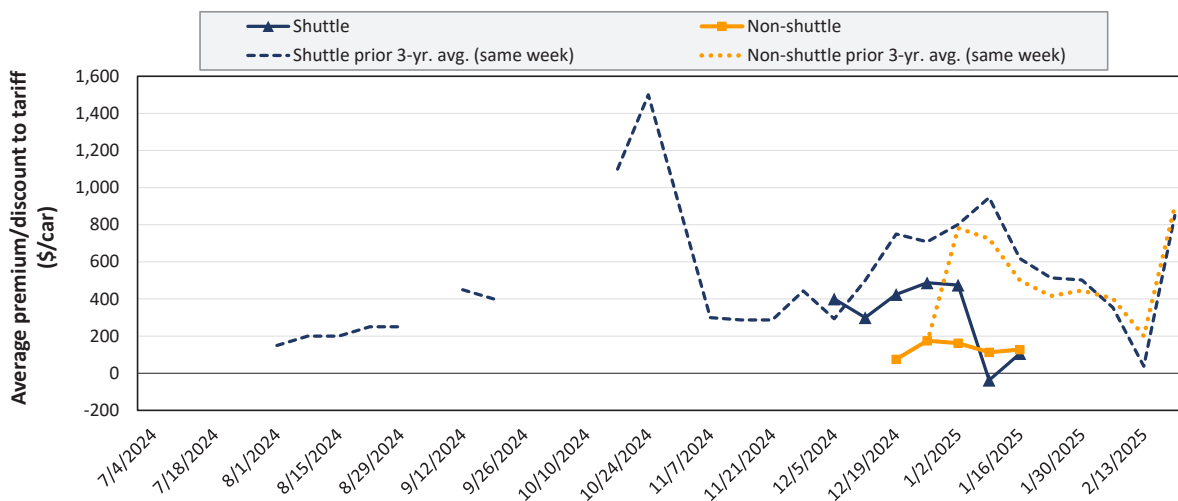
Average non-shuttle bids/offers rose \$125 this week, and are at the peak.

Average shuttle bids/offers rose \$100 this week and are \$1,313 below the peak.

	1/16/2025	BNSF	UP
Non-Shuttle		\$250	n/a
Shuttle		\$350	-\$375

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

**Figure 7. Secondary market bids/offers for railcars to be delivered in February 2025**



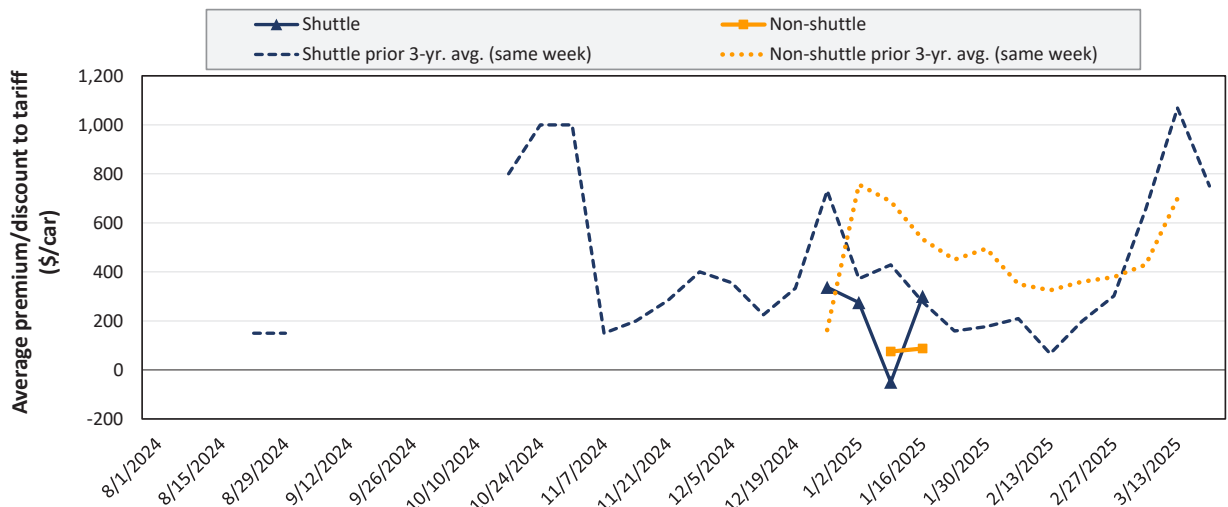
Average non-shuttle bids/offers rose \$15 this week, and are \$48 below the peak.

Average shuttle bids/offers rose \$144 this week and are \$381 below the peak.

	1/16/2025	BNSF	UP
Non-Shuttle		\$217	\$38
Shuttle		\$488	-\$275

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

**Figure 8. Secondary market bids/offers for railcars to be delivered in March 2025**



Average non-shuttle bids/offers rose \$13 this week, and are at the peak.

Average shuttle bids/offers rose \$350 this week and are \$38 below the peak.

1/16/2025	BNSF	UP
Non-Shuttle	\$125	\$50
Shuttle	\$300	n/a

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 analysis of data from Tradewest Brokerage Company and the Malsam Company.

**Table 5. Weekly secondary railcar market (dollars per car)**

For the week ending: 1/16/2025		Delivery period					
		Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25
Non-shuttle	BNSF	250	217	125	n/a	n/a	n/a
	Change from last week	125	92	75	n/a	n/a	n/a
	Change from same week 2024	n/a	-383	-225	n/a	n/a	n/a
	UP	n/a	38	50	50	n/a	n/a
	Change from last week	n/a	-63	-50	-13	n/a	n/a
	Change from same week 2024	n/a	-38	0	0	n/a	n/a
Shuttle	BNSF	350	488	300	n/a	n/a	n/a
	Change from last week	350	263	150	n/a	n/a	n/a
	Change from same week 2024	n/a	-163	-25	n/a	n/a	n/a
	UP	-375	-275	n/a	n/a	n/a	n/a
	Change from last week	-150	25	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-150	n/a	n/a	n/a	n/a
	CPKC	-150	0	50	n/a	n/a	n/a
	Change from last week	-150	-100	-150	n/a	n/a	n/a
Change from same week 2024	n/a	-100	50	n/a	n/a	n/a	

Note: Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.  
 Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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 6. Tariff rail rates for unit train shipments, January 2025**

Commodity	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Wichita, KS	St. Louis, MO	\$4,991	\$147	\$51.02	\$1.39	19
	Grand Forks, ND	Duluth-Superior, MN	\$3,862	\$21	\$38.56	\$1.05	8
	Wichita, KS	Los Angeles, CA	\$7,020	\$107	\$70.78	\$1.93	-2
	Wichita, KS	New Orleans, LA	\$4,425	\$258	\$46.51	\$1.27	-10
	Sioux Falls, SD	Galveston-Houston, TX	\$6,966	\$88	\$70.05	\$1.91	2
	Colby, KS	Galveston-Houston, TX	\$4,675	\$283	\$49.23	\$1.34	-10
	Amarillo, TX	Los Angeles, CA	\$5,585	\$394	\$59.37	\$1.62	5
Corn	Champaign-Urbana, IL	New Orleans, LA	\$5,385	\$292	\$56.37	\$1.43	2
	Toledo, OH	Raleigh, NC	\$8,877	\$0	\$88.15	\$2.24	0
	Des Moines, IA	Davenport, IA	\$3,619	\$62	\$36.55	\$0.93	26
	Indianapolis, IN	Atlanta, GA	\$6,866	\$0	\$68.18	\$1.73	0
	Indianapolis, IN	Knoxville, TN	\$5,790	\$0	\$57.50	\$1.46	0
	Des Moines, IA	Little Rock, AR	\$4,705	\$182	\$48.53	\$1.23	4
	Des Moines, IA	Los Angeles, CA	\$6,585	\$529	\$70.64	\$1.79	0
Soybeans	Minneapolis, MN	New Orleans, LA	\$3,468	\$406	\$38.47	\$1.05	2
	Toledo, OH	Huntsville, AL	\$7,324	\$0	\$72.73	\$1.98	1
	Indianapolis, IN	Raleigh, NC	\$8,169	\$0	\$81.12	\$2.21	0
	Indianapolis, IN	Huntsville, AL	\$5,921	\$0	\$58.80	\$1.60	0
	Champaign-Urbana, IL	New Orleans, LA	\$5,320	\$292	\$55.73	\$1.52	2

Note: A 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. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge

Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.



**Table 7. Tariff rail rates for shuttle train shipments, January 2025**

Commodity	Origin region	Destination region	Tariff rate/car	Fuel surcharge per car	Tariff plus surcharge per metric ton	Tariff plus surcharge per bushel	Percent Change Y/Y
Wheat	Great Falls, MT	Portland, OR	\$4,343	\$62	\$43.74	\$1.19	3
	Wichita, KS	Galveston-Houston, TX	\$4,411	\$48	\$44.28	\$1.21	4
	Chicago, IL	Albany, NY	\$7,413	\$0	\$73.61	\$2.00	0
	Grand Forks, ND	Portland, OR	\$6,001	\$106	\$60.65	\$1.65	0
	Grand Forks, ND	Galveston-Houston, TX	\$5,446	\$109	\$55.17	\$1.50	0
	Garden City, KS	Portland, OR	\$6,695	\$136	\$67.84	\$1.85	-
Corn	Minneapolis, MN	Portland, OR	\$5,510	\$130	\$56.00	\$1.42	-8
	Sioux Falls, SD	Tacoma, WA	\$5,470	\$119	\$55.50	\$1.41	-8
	Champaign-Urbana, IL	New Orleans, LA	\$4,625	\$292	\$48.83	\$1.24	3
	Lincoln, NE	Galveston-Houston, TX	\$4,860	\$69	\$48.95	\$1.24	2
	Des Moines, IA	Amarillo, TX	\$5,125	\$228	\$53.16	\$1.35	3
	Minneapolis, MN	Tacoma, WA	\$5,510	\$129	\$55.99	\$1.42	-8
	Council Bluffs, IA	Stockton, CA	\$6,080	\$133	\$61.70	\$1.57	-1
Soybeans	Sioux Falls, SD	Tacoma, WA	\$6,185	\$119	\$62.60	\$1.70	-7
	Minneapolis, MN	Portland, OR	\$6,235	\$130	\$63.20	\$1.72	-7
	Fargo, ND	Tacoma, WA	\$6,085	\$105	\$61.47	\$1.67	-7
	Council Bluffs, IA	New Orleans, LA	\$5,550	\$336	\$58.45	\$1.59	2
	Toledo, OH	Huntsville, AL	\$5,564	\$0	\$55.25	\$1.50	1
	Grand Island, NE	Portland, OR	\$6,185	\$475	\$66.13	\$1.80	1

Note: A 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. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel of wheat and soybeans. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge.

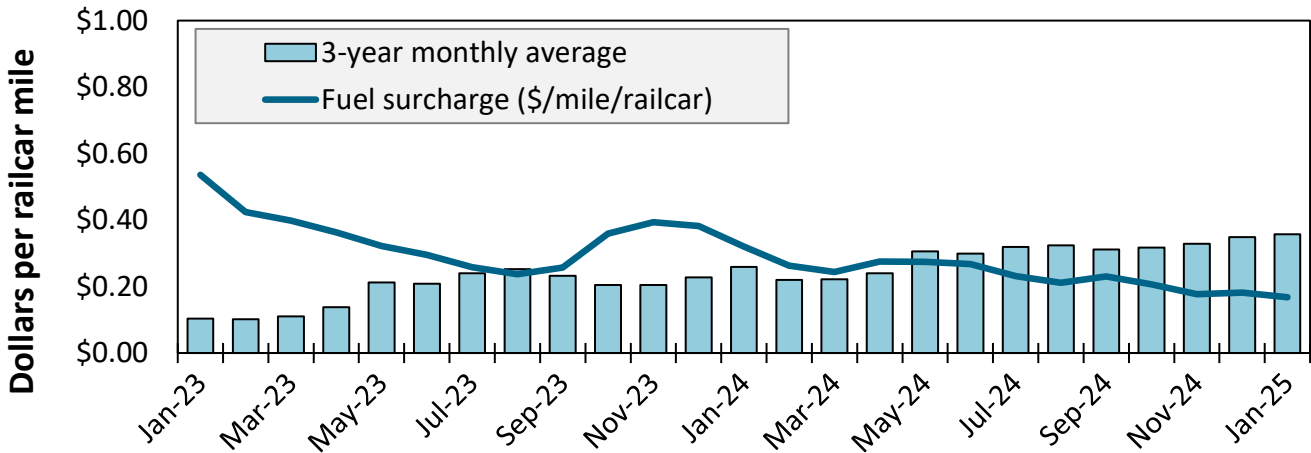
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

**Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, January 2025**

Commodity	US origin	US border city	US railroad	Train type	US rate plus fuel surcharge per car (USD)	US tariff rate + fuel surcharge per metric ton (USD)	US tariff rate + fuel surcharge per bushel (USD)	Percent M/M	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	\$4,650	\$45.77	\$1.16	-0.5	1.2
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	\$5,527	\$54.40	\$1.38	-0.5	-2.1
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	\$6,048	\$59.52	\$1.51	-0.5	-2.4
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,434	\$53.48	\$1.36	-0.5	-2.0
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	\$5,646	\$55.57	\$1.41	-0.5	-2.1
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$5,055	\$49.75	\$1.26	-0.3	1.8
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$5,190	\$51.08	\$1.30	-0.2	1.6
Superior, NE	El Paso, TX	BNSF	Shuttle	\$5,071	\$49.91	\$1.27	-0.4	2.2	
Soybeans	Atchison, KS	Laredo, TX	KCS	Non-shuttle	\$5,527	\$54.40	\$1.48	-0.5	-2.1
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	\$5,401	\$53.16	\$1.45	-0.4	-3.7
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$6,602	\$64.98	\$1.77	-0.2	1.5
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	\$5,402	\$53.17	\$1.45	-0.4	-3.7
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,434	\$53.48	\$1.46	-0.5	-2.0
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$6,704	\$65.98	\$1.80	-0.2	1.3
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	\$3,956	\$38.94	\$1.06	-0.6	-2.5
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$3,538	\$34.82	\$0.95	-0.7	-2.3
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,789	\$47.13	\$1.28	-0.2	-10.1
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	\$5,434	\$53.48	\$1.46	-0.5	-2.0
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,578	\$45.06	\$1.23	-0.2	-10.2

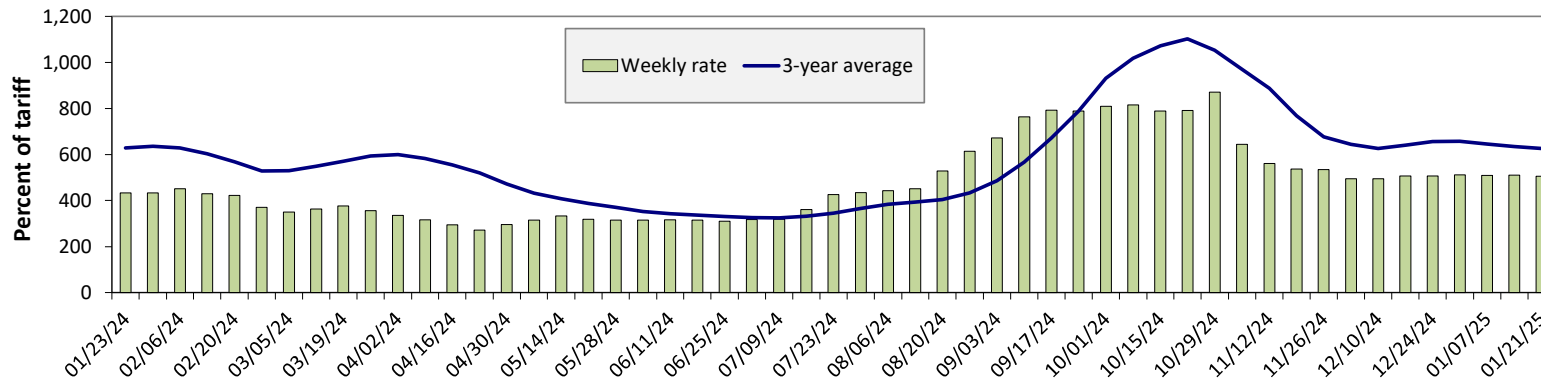
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments that continue into Mexico, and the total cost of the shipment would include a separate rate obtained from a Mexican railroad. The rates apply to jumbo covered hopper ("C114") cars. The "shuttle" train type applies to qualified shipments (typically, 110 cars) that meet railroad efficiency requirements. The "non-shuttle" train type applies to Kansas City Southern (KCS) (now CPKC) shipments and is made up of 75 cars or more (except the Marshall, MO, rate is for a 50-74 car train). BNSF Railway's domestic efficiency trains (DET) are shuttle-length trains (typically 110 cars) that can be split en route for unloading at multiple destinations. Percentage change month to month (M/M) and year to year (Y/Y) are calculated using the tariff rate plus fuel surcharge. For a larger list of to-the-border rates, see [AgTransport](#).  
 Source: BNSF Railway, Union Pacific Railroad, and CPKC (formerly, Kansas City Southern Railway).

**Figure 9. Railroad fuel surcharges, North American weighted average**



January 2025: \$0.17/mile, down 1 cent from last month's surcharge of \$0.18/mile; down 15 cents from the January 2024 surcharge of \$0.32/mile; and down 19 cents from the January prior 3-year average of \$0.36/mile.

**Figure 10. Illinois River barge freight rate**



For the week ending January 21: 1 percent lower than the previous week; 17 percent higher than last year; and 19 percent lower than the 3-year average.

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.  
Source: USDA, Agricultural Marketing Service.

**Table 9. Weekly barge freight rates: southbound only**

Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	1/21/2025	n/a	n/a	506	370	356	252
	1/14/2025	n/a	n/a	510	375	350	263
\$/ton	1/21/2025	n/a	n/a	23.48	14.76	16.70	7.91
	1/14/2025	n/a	n/a	23.66	14.96	16.42	8.26
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	n/a	n/a	17	14	4	-7
	3-year avg.	n/a	n/a	-19	-28	-35	-38
Rate	February	n/a	n/a	480	356	354	244
	April	444	405	380	332	340	248

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of \$6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi assumes a base rate of \$5.32 (Savanna, IL, to Keithsburg, IL). The per ton rate on the Illinois River assumes a base rate of \$4.64 (Havana, IL, to Hardin, IL). The per ton rate at St. Louis assumes a base rate of \$3.99 (Grafton, IL, to Cape Girardeau, MO). The per ton rate on the Ohio River assumes a base rate of \$4.69 (Silver Grove, KY, to Madison, IN). The per ton rate at Memphis-Cairo assumes a base rate of \$3.14 (West Memphis, AR, to Memphis, TN). For more on base rate values along the various segments of the Mississippi River System, see [AgTransport](#).  
Source: USDA, Agricultural Marketing Service.

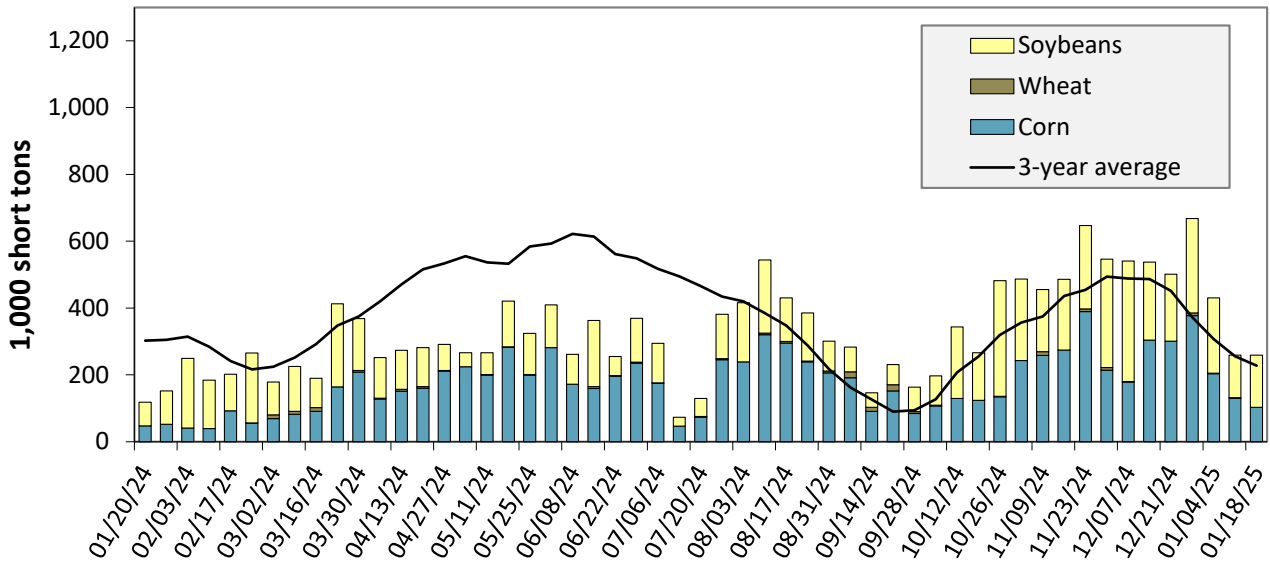
**Figure 11. Benchmark tariff rates**



Source: USDA, Agricultural Marketing Service.



**Figure 12. Barge movements on the Mississippi River (Locks 27-Granite City, IL)**



For the week ending January 18: 119 percent higher than last year and 14 percent higher than the 3-year average.

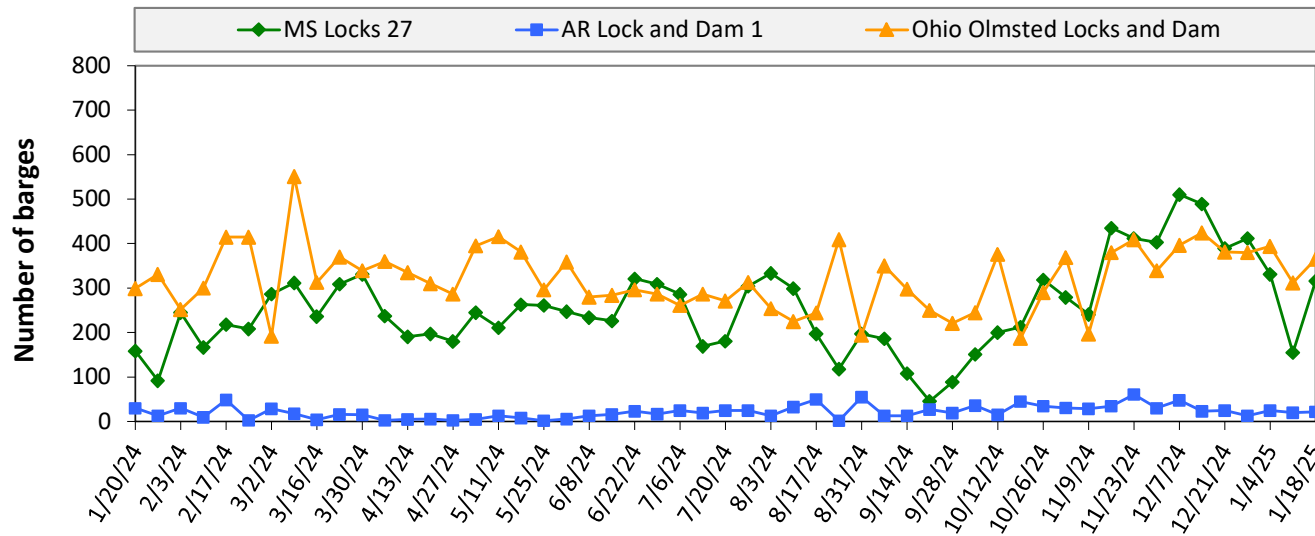
Note: The 3-year average is a 4-week moving average.  
Source: U.S. Army Corps of Engineers.

**Table 10. Barged grain movements (1,000 tons)**

For the week ending 01/18/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	0	0	0	0	0
Mississippi River (Winfield, MO (L25))	0	0	0	0	0
Mississippi River (Alton, IL (L26))	102	0	202	0	303
Mississippi River (Granite City, IL (L27))	103	0	156	0	259
Illinois River (La Grange)	107	0	211	0	318
Ohio River (Olmsted)	83	4	59	9	154
Arkansas River (L1)	0	5	10	0	15
Weekly total - 2025	186	9	224	9	428
Weekly total - 2024	106	8	220	0	334
2025 YTD	727	21	826	9	1,583
2024 YTD	513	42	857	10	1,422
2025 as % of 2024 YTD	142	50	96	92	111
Last 4 weeks as % of 2024	179	67	114	92	136
Total 2024	15,251	1,564	12,598	214	29,626

Note: "Other" refers to oats, barley, sorghum, and rye. Total may not add up due to rounding. YTD = year to date. Weekly total, YTD, and calendar year total include Mississippi River lock 27, Ohio River Olmsted lock, and Arkansas Lock 1. "L" (as in "L15") refers to a lock, locks, or lock and dam facility.  
Source: U.S. Army Corps of Engineers.

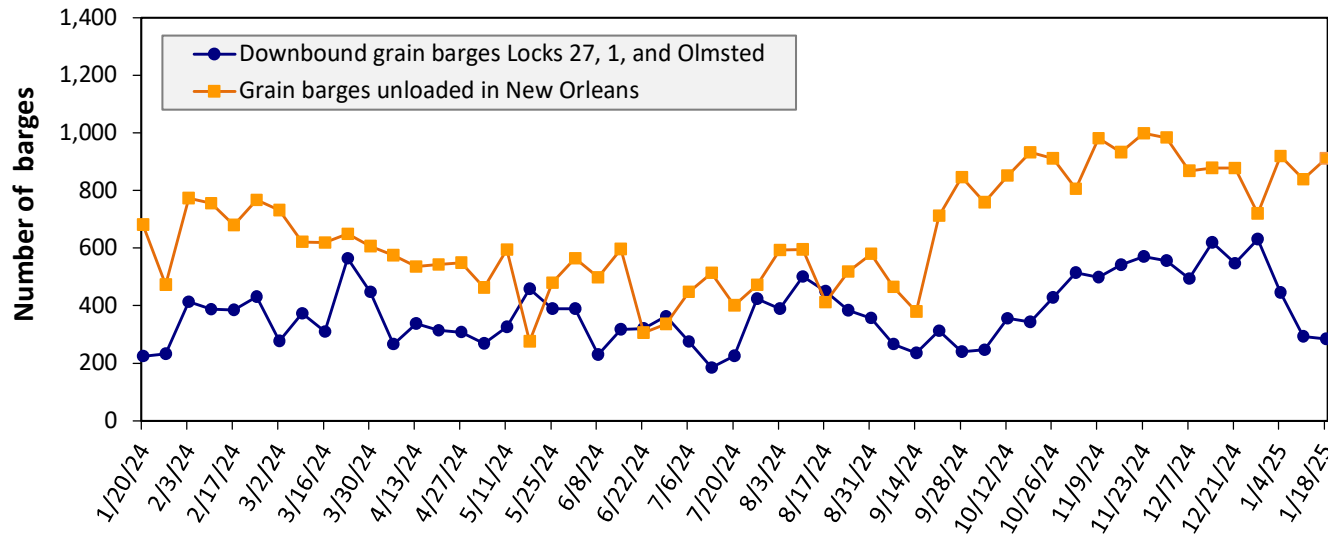
**Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**



For the week ending January 18: 703 barges transited the locks, 216 barges more than the previous week, and 31 percent higher than the 3-year average

Source: U.S. Army Corps of Engineers.

**Figure 14. Grain barges for export in New Orleans region**



For the week ending January 18: 284 barges moved down river, 9 fewer than the previous week; 911 grain barges unloaded in the New Orleans Region, 9 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

**Table 11. Monthly barge freight rates Columbia-Snake River**

River	Origin	\$/ton			Current month % change from the same month	
		January 2025	December 2024	January 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$21.50	\$21.58	\$21.36	0.7	2.6
	Central Ferry, WA/Almota, WA	\$20.60	\$20.68	\$20.49	0.6	2.4
	Lyons Ferry, WA	\$19.59	\$19.67	\$19.52	0.4	2.0
	Windust, WA/Lower Monumental, WA	\$18.56	\$18.64	\$18.53	0.2	1.6
	Sheffler, WA	\$18.53	\$18.61	\$18.50	0.2	1.6
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$17.33	\$17.41	\$17.35	-0.1	1.0
	Port Kelly, WA/Wallula, WA	\$17.11	\$17.19	\$17.14	-0.1	0.9
	Umatilla, OR	\$17.01	\$17.09	\$17.04	-0.1	0.8
	Boardman, OR/Hogue Warner, OR	\$16.75	\$16.83	\$16.79	-0.2	0.7
	Arlington, OR/Roosevelt, WA	\$16.59	\$16.67	\$16.64	-0.3	0.6
	Biggs, OR	\$15.26	\$15.34	\$15.36	-0.6	-0.1
	The Dalles, OR	\$14.16	\$14.24	\$14.30	-0.9	-0.8

Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.  
Source: USDA, Agricultural Marketing Service.

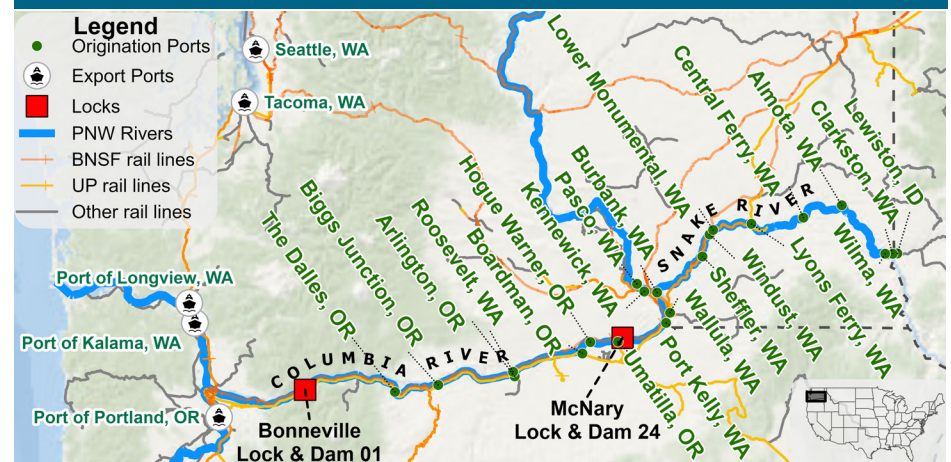
**Table 12. Monthly barged grain movements Columbia-Snake (1,000 tons)**

December, 2024	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	285	0	285
Columbia River (Bonneville Lock and Dam (L1))	264	0	264
Monthly total 2024	264	0	264
Monthly total 2023	345	0	345
2024 YTD	3,523	0	3,523
2023 YTD	n/a	n/a	n/a

Note: "Other" refers to corn, soybeans, oats, barley, and rye. Totals may not add up because of rounding. "Monthly total" refers to grain moving through Lock 1, headed for export. YTD = year to date. "L" (as in "L1") refers to lock, locks, or lock and dam facility. n/a = data not available.

Source: U.S. Army Corps of Engineers.

**Figure 15. Dam and port locations on Columbia-Snake River**



Source: USDA, Agricultural Marketing Service.

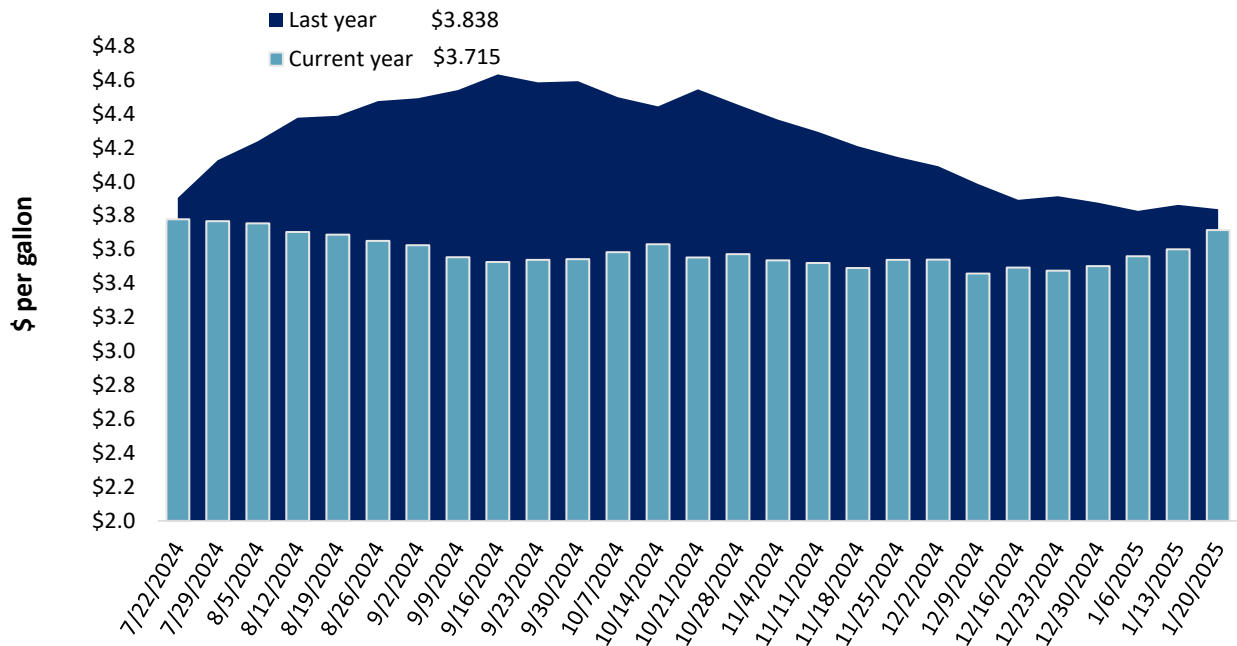
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

**Table 13. Retail on-highway diesel prices, week ending 1/20/2025 (U.S. \$/gallon)**

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.820	0.102	-0.159
	New England	3.944	0.123	-0.344
	Central Atlantic	3.976	0.100	-0.256
	Lower Atlantic	3.750	0.101	-0.103
II	Midwest	3.648	0.116	-0.056
III	Gulf Coast	3.455	0.134	-0.129
IV	Rocky Mountain	3.485	0.086	-0.211
V	West Coast	4.302	0.089	-0.202
	West Coast less California	3.865	0.089	-0.127
	California	4.807	0.091	-0.285
Total	United States	3.715	0.113	-0.123

Note: Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel. On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.  
 Source: U.S. Department of Energy, Energy Information Administration.

**Figure 16. Weekly diesel fuel prices, U.S. average**



For the week ending January 20, the U.S. average diesel fuel price increased 11.3 cents from the previous week to \$3.715 per gallon, 12.3 cents below the same week last year.

Note: On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.  
 Source: U.S. Department of Energy, Energy Information Administration.

**Table 14. U.S. export balances and cumulative exports (1,000 metric tons)**

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 1/9/2025	1,065	735	1,586	1,456	128	4,970	22,174	9,523	36,667
	This week year ago	847	2,384	1,583	977	123	5,913	17,100	12,159	35,172
	Last 4 wks. as % of same period 2023/24	123	32	92	137	85	80	132	91	109
Current shipped (cumulative) exports sales	2024/25 YTD	3,005	1,851	4,144	3,332	227	12,559	18,096	31,368	62,023
	2023/24 YTD	1,945	1,968	3,675	2,309	291	10,188	14,428	25,229	49,844
	YTD 2024/25 as % of 2023/24	155	94	113	144	78	123	125	124	124
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435

Note: The marketing year for wheat is Jun. 1 to May 31 and, for corn and soybeans, Sep. 1 to Aug. 31. YTD = year-to-date; wks. = weeks.

Source: USDA, Foreign Agricultural Service.

**Table 15. Top 5 importers of U.S. corn**

For the week ending 1/9/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2024/25	YTD MY 2023/24		
Mexico	15,506	14,724	5	17,746
Japan	5,448	4,451	22	9,366
China	26	1,819	-99	8,233
Colombia	3,996	2,772	44	4,383
Korea	1,563	562	178	1,565
Top 5 importers	26,539	24,327	9	41,293
Total U.S. corn export sales	40,270	31,527	28	51,170
% of YTD current month's export projection	65%	54%	-	-
Change from prior week	1,024	1,251	-	-
Top 5 importers' share of U.S. corn export sales	66%	77%	-	81%
USDA forecast January 2025	62,233	58,220	7	-
Corn use for ethanol USDA forecast, January 2025	139,700	139,141	0	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (Sep. 1 – Aug. 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.

Source: USDA, Foreign Agricultural Service.



**Table 16. Top 5 importers of U.S. soybeans**

For the week ending 1/9/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2024/25	YTD MY 2023/24		
China	19,250	20,157	-5	28,636
Mexico	3,412	3,268	4	4,917
Japan	1,233	1,419	-13	2,231
Egypt	1,761	358	391	2,228
Indonesia	1,022	919	11	1,910
Top 5 importers	26,678	26,121	2	39,922
Total U.S. soybean export sales	40,891	37,388	9	51,302
% of YTD current month's export projection	82%	81%	-	-
Change from prior week	569	781	-	-
Top 5 importers' share of U.S. soybean export sales	65%	70%	-	78%
USDA forecast, January 2025	49,668	46,130	8	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (Sep. 1 – Aug. 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, “Exports” = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; “-” = not applicable.

Source: USDA, Foreign Agricultural Service.

**Table 17. Top 10 importers of all U.S. wheat**

For the week ending 1/9/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2024/25	YTD MY 2023/24		
Mexico	3,195	2,478	29	3,298
Philippines	2,230	2,162	3	2,494
Japan	1,667	1,498	11	2,125
China	139	2,398	-94	1,374
Korea	1,957	1,115	76	1,274
Taiwan	847	910	-7	921
Nigeria	430	202	113	920
Thailand	768	387	99	552
Colombia	348	218	60	522
Vietnam	354	360	-2	313
Top 10 importers	11,936	11,726	2	13,792
Total U.S. wheat export sales	17,530	16,101	9	18,323
% of YTD current month's export projection	76%	84%	-	-
Change from prior week	513	708	-	-
Top 10 importers' share of U.S. wheat export sales	68%	73%	-	75%
USDA forecast, January 2025	23,133	19,241	20	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (June 1 – May 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from 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. In rightmost column, “Exports” = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; “-” = not applicable.

Source: USDA, Foreign Agricultural Service.

**Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)**

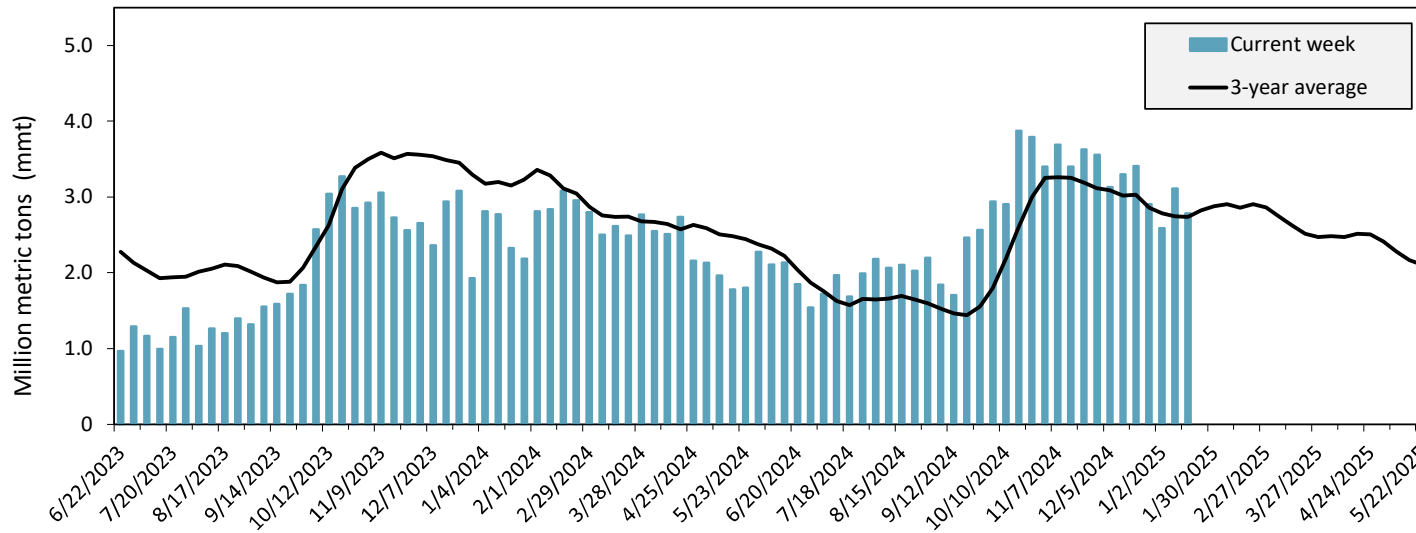
Port regions	Commodity	For the week ending 01/16/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	651	461	141	1,111	584	190	183	219	13,987
	Soybeans	68	338	20	541	610	89	109	81	10,445
	Wheat	175	108	162	283	523	54	65	88	11,453
	All grain	894	907	99	1,936	1,846	105	108	114	37,186
Mississippi Gulf	Corn	648	766	85	1,500	1,000	150	129	126	27,407
	Soybeans	727	860	85	1,808	1,861	97	119	94	29,741
	Wheat	68	60	113	136	134	102	95	98	4,523
	All grain	1,442	1,685	86	3,445	3,050	113	120	104	61,789
Texas Gulf	Corn	4	6	60	11	20	58	62	48	570
	Soybeans	0	0	n/a	0	0	n/a	25256	321	741
	Wheat	0	48	0	48	0	n/a	2085	160	1,940
	All grain	13	55	24	70	246	28	82	79	6,965
Interior	Corn	218	202	107	460	513	90	94	100	13,463
	Soybeans	118	108	109	269	382	70	84	81	8,058
	Wheat	19	72	26	116	102	113	132	122	2,947
	All grain	354	395	90	856	1,008	85	94	95	24,742
Great Lakes	Corn	0	0	n/a	0	0	n/a	n/a	n/a	271
	Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	136
	Wheat	0	11	0	11	12	93	134	232	653
	All grain	0	11	0	11	12	93	251	304	1,060
Atlantic	Corn	22	7	304	29	9	311	206	250	410
	Soybeans	8	51	16	61	116	52	106	73	1,272
	Wheat	0	0	n/a	0	0	n/a	n/a	n/a	73
	All grain	30	58	51	90	126	71	115	82	1,754
All Regions	Corn	1,541	1,442	107	3,112	2,125	146	135	140	56,109
	Soybeans	973	1,357	72	2,731	3,023	90	114	90	50,864
	Wheat	262	299	87	594	772	77	97	107	21,589
	All grain	2,786	3,112	90	6,459	6,340	102	111	104	133,968

\*Note: Data include revisions from prior weeks; "All grain" includes corn, soybeans, wheat, sorghum, oats, barley, rye, sunflower, flaxseed, and mixed grains; "All regions" includes listed regions and other minor regions not listed; YTD= year-to-date; n/a = not available or no change.

Source: USDA, Federal Grain Inspection Service.

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.

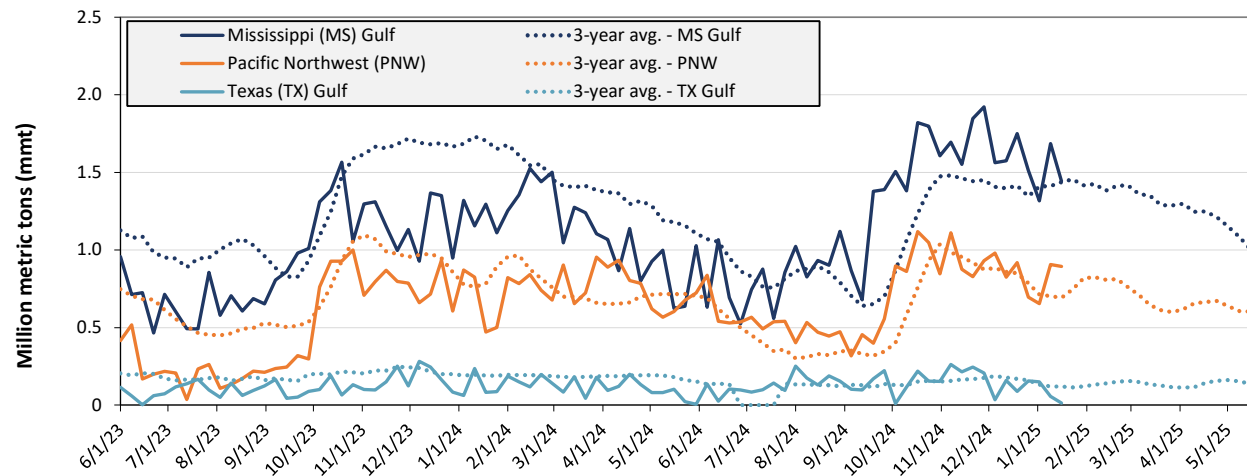
**Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)**



For the week ending Jan. 16: 2.8 mmt of grain inspected, down 10 percent from the previous week, down 5 percent from the same week last year, and up 2 percent from the 3-year average.

Note: 3-year average consists of 4-week running average.  
Source: USDA, Federal Grain Inspection Service.

**Figure 18. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)**



**Week ending 01/16/25 inspections (mmt):**

MS Gulf: 1.44

PNW: 0.89

TX Gulf: 0.01

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 14	down 76	down 16	down 1
Last year (same 7 days)	down 9	down 92	down 17	up 28
3-year average (4-week moving average)	unchanged	down 89	down 6	up 29

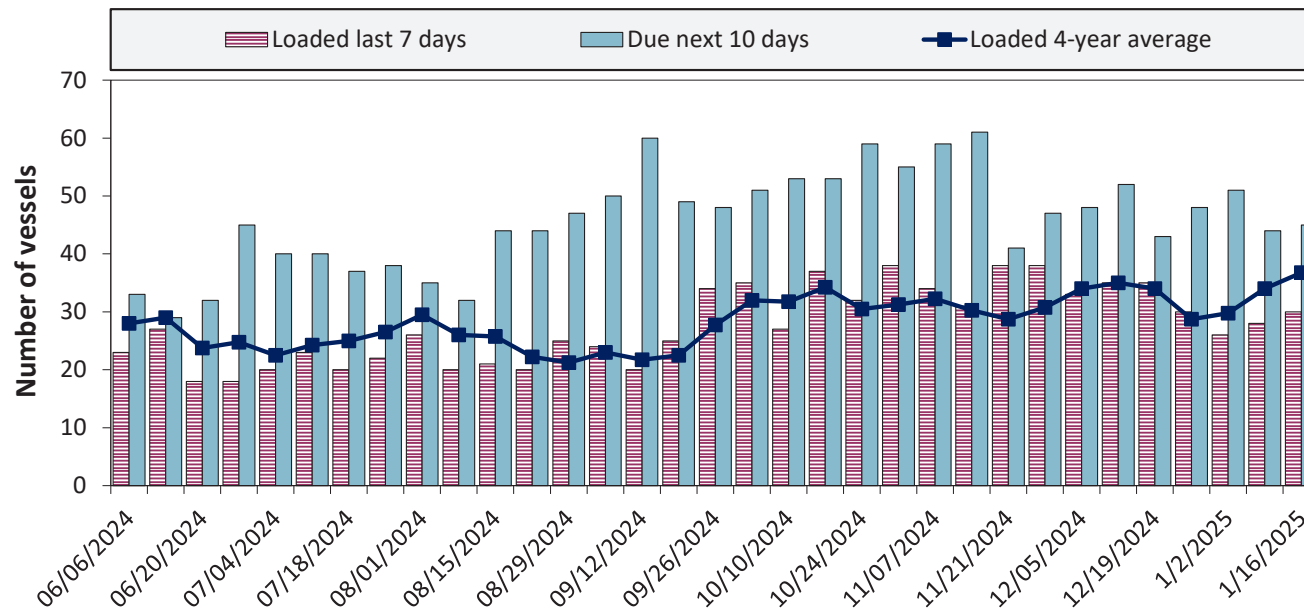
Source: USDA, Federal Grain Inspection Service.

**Table 19. 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
1/16/2025	31	30	45	14
1/9/2025	30	28	44	10
2024 range	(11...45)	(18...38)	(29...61)	(3...25)
2024 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.  
 Source: USDA, Agricultural Marketing Service.

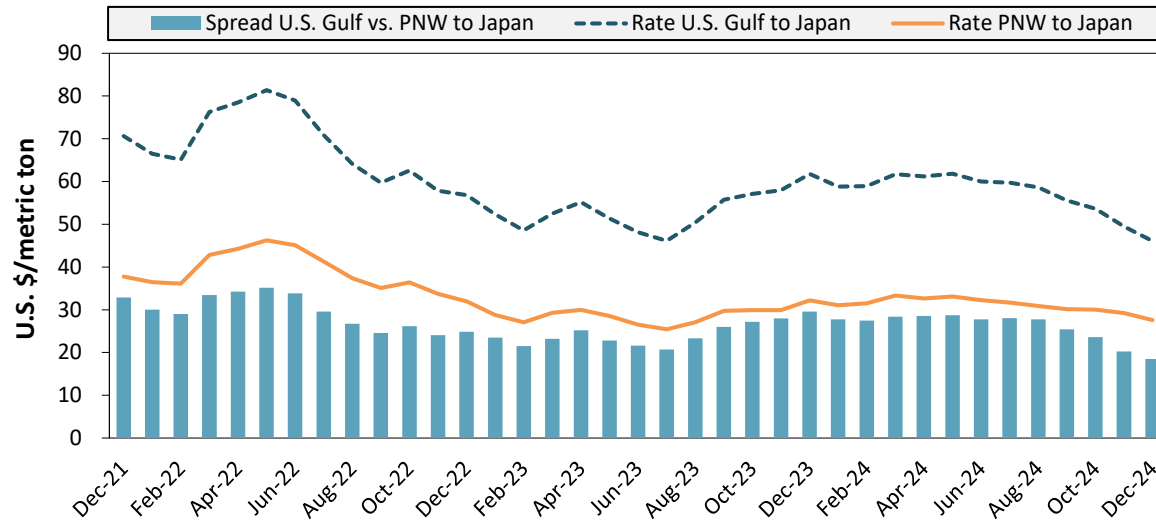
**Figure 19. U.S. Gulf vessel loading activity**



Week ending 1/16/25, number of vessels	Loaded	Due
Change from last year	-14%	-17%
Change from 4-year average	-18%	-11%

Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.  
 Source: USDA, Agricultural Marketing Service.

Figure 20. U.S. Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
December 2024	\$46	\$28	\$19
Change from December 2023	-25%	-14%	-38%
Change from 4-year average	-20%	-12%	-30%

Note: PNW = Pacific Northwest  
 Source: O'Neil Commodity Consulting.

Table 20. Ocean freight rates for selected shipments, week ending 1/18/2025

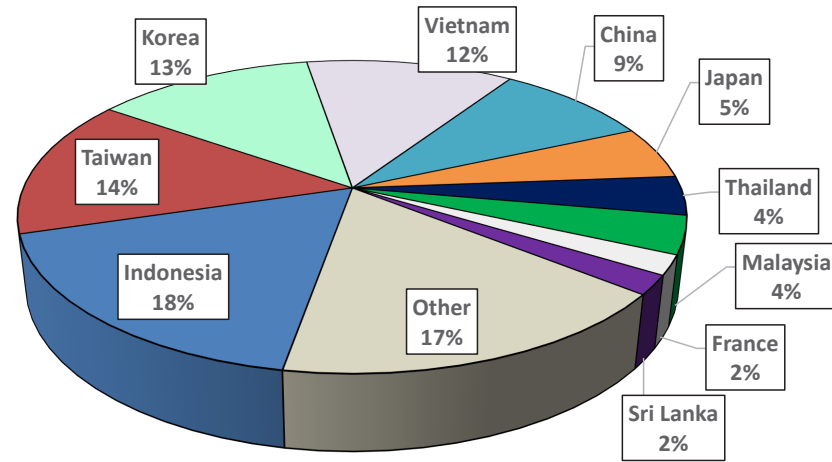
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Sep 30, 2024	Oct 1/10, 2024	58,000	62.00
U.S. Gulf	China	Heavy grain	Sep 19, 2024	Oct 1/10, 2024	66,000	56.85
U.S. Gulf	China	Heavy grain	Sep 9, 2024	Oct 1/9, 2024	66,000	53.00
U.S. Gulf	China	Heavy grain	Sep 9, 2024	Sep 15/Oct 15, 2024	68,000	57.00
U.S. Gulf	China	Heavy grain	Aug 26, 2024	Sep 1/Oct 1, 2024	58,000	60.50
U.S. Gulf	N. China	Heavy grain	Aug 20, 2024	Sept 15/Oct 15, 2024	68,000	57.00
U.S. Gulf	Colombia	Soybean Meal	May 7, 2024	May 20/30, 2024	3,000	28.30
Brazil	China	Heavy grain	Jan 13, 2025	Jan 25/ Feb 5, 2025	63,000	31.25
Brazil	China	Heavy grain	Jan 13, 2025	Jan 20/Feb 9, 2025	63,000	30.50
Brazil	China	Heavy grain	Jan 8, 2025	Feb 2/11, 2025	63,000	32.00
Brazil	China	Heavy grain	Jan 8, 2025	Jan 28/Feb 3, 2025	66,000	31.50
Brazil	China	Heavy grain	Dec 12, 2024	Jan 25/Feb 25, 2025	63,000	31.25
Brazil	China	Heavy grain	Dec 12, 2024	Jan 20/Feb 10, 2025	63,000	30.50
Brazil	N. China	Heavy grain	Jul 11, 2024	Aug 7/13, 2024	63,000	47.25
Brazil	China	Heavy grain	Jul 5, 2024	Aug 4/Sep 14, 2024	63,000	42.50
EC S. America	China	Heavy grain	Jan 8, 2025	Feb 2/11, 2025	66,000	31.75
Ukraine	Portugal	Heavy grain	Aug 15, 2024	Aug 15/19, 2024	25,000	25.50
<b>Ukraine</b>	S. China	Barley	Jun 25, 2024	Jul 10/30, 2024	60,000	49.00

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B), except where otherwise indicated. op = option  
 Source: Maritime Research, Inc.



In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined for Asia.

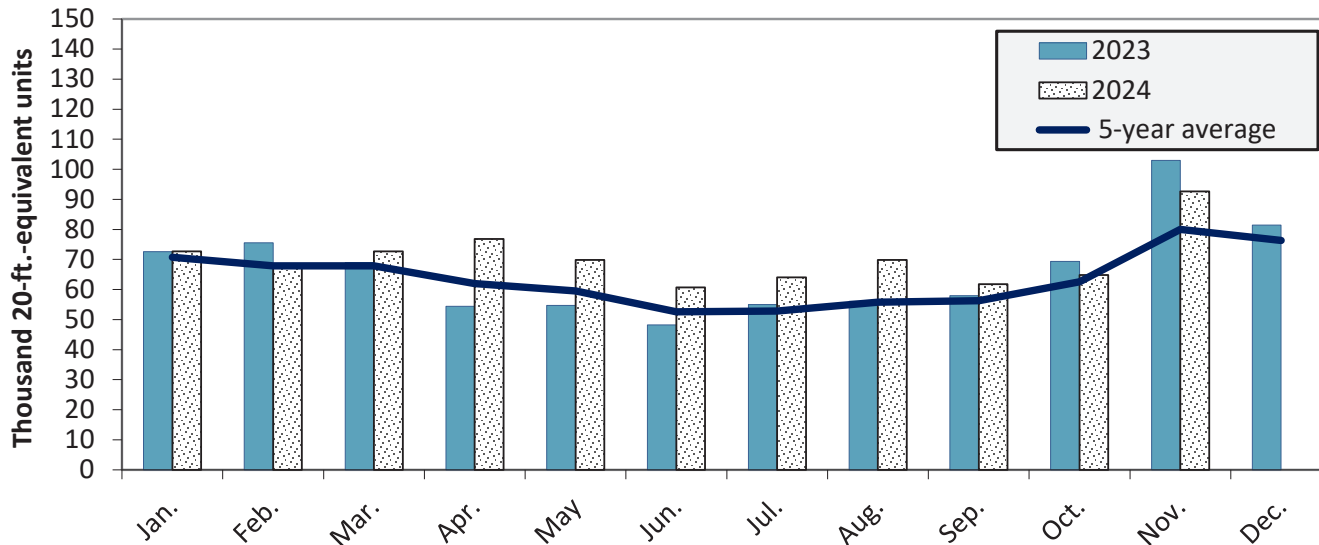
**Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Nov 2024**



Note: The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.

Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

**Figure 22. Monthly shipments of U.S. containerized grain exports**



Containerized grain shipments in Nov. 2024 were down 10.0 percent from last year but up 15.8 percent from the 5-year average.

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, and 230990.

Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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