USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE

Grain Transportation Report

Contents

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CHS Expands Shuttle-Loading Elevator in Minnesota's Red River Valley. CHS Inc. recently announced plans to expand and upgrade its shuttle-loading elevator in Warren, MN. The facility serves Minnesota's Red River Valley, and it handles corn, soybeans, and hard red spring wheat.

CHS plans to add several new steel bins, which will nearly double the facility's capacity to 4 million bushels. CHS also plans to increase the facility's receiving and drying capacity—allowing for more efficient service during harvest. Slated to begin in summer 2025, the project is tentatively scheduled for completion in early 2026.

The facility is served by two Class I railroads—BNSF Railway (BNSF) and Canadian Pacific Kansas City (CPKC), via the Northern Plains Railroad. Through the BNSF and CPKC network, CHS is able to access domestic markets and Pacific Northwest export terminals from its Warren facility. CHS is also able to access Mexican markets through single-line service on the CPKC network (*Grain Transportation Report (GTR), December 19, 2024, first highlight*).

CSX Embargoes Wheat Shipments to South Florida Flour Mill. Since February 2, CSX Transportation (CSX) has embargoed all shipments (primarily, wheat) to Bay State Milling Company's flour mill in Indiantown, in South Florida. According to CSX, the embargo is due to congestion caused by excessive traffic volumes en route and in the facility's serving yard.

According to Grain and Milling Annual 2025, the Indiantown facility—one of Florida's two flour mills—has the capacity to mill 13,200 hundredweight of flour daily. (Florida's other mill is in Gibsonton, part of the Tampa Bay area.)

Most wheat arrives to the inland Indiantown facility by rail. Wheat ships from the Great Plains to Chicago, IL, by Western Class I railroads and by CSX for the rest of the way. Currently, the rail tariff rate to ship a carload of wheat from Chicago to Indiantown (in manifest service) is $8,568 per railroad-owned car and $8,238 per shipper-owned car.

Wisconsin Invests $10.8 Million in Harbor Infrastructure Projects. On January 15, the Wisconsin Governor allocated $10.8 million for five harbor infrastructure projects to help move freight more efficiently through the State's supply chain. The Governor noted that supporting all modes of transportation is vital to improving infrastructure across the State.

Wisconsin has allotted money for harbor maintenance and construction projects in Green Bay, La Crosse, La Pointe, Manitowoc, and Marinette to strengthen the waterborne freight supply chain and promote economic growth in local communities.

Among the grants, $2.3 million will help Hanke Terminal Inc. build a commodity storage facility in La Crosse, WI, to expand import and export operations on the Mississippi River.

During the 2024 navigation season from mid-March to December 1, 20,300 tons of wheat moved through Lock and Dam 7 near La Crescent, MN, the closest lock to La Crosse, WI.

Gulf Loading Activity Revives After Winter Storm. Normal grain vessel loading activity has resumed in the U.S. Gulf after a winter storm in the New Orleans region on January 20-22 had briefly closed grain elevators (*GTR, January 30, 2025, first highlight*).

During the week ending January 30, 34 oceangoing grain vessels were loading or waiting to load, and 29 vessels were loaded (*GTR, figure 19*). This is compared to 22 vessels loading or waiting to load and 23 vessels loaded during the previous week (ending January 23) when the storm occurred.

For the week ending February 1, 865 grain barges were unloaded in the New Orleans region, up 107 percent from last week and up 12 percent from the same week last year (*GTR, figure 14*).

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 23, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 36.84 million metric tons (mmt), down 1 percent from last week and up 7 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.36 mmt, down 18 percent from last week. Net **soybean export sales** were 0.44 mmt, down 71 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.46 mmt, up 177 percent from last week.

Rail

U.S. Class I railroads originated 22,150 **grain carloads** during the week ending January 25. This was a 9-percent decrease from the previous week, 12 percent fewer than last year, and 18 percent fewer than the 3-year average.

Average February **shuttle secondary railcar bids/offers** (per car) were $3 below tariff for the week ending January 30. This was $169 less than last week and $588 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $338 above tariff. This was $144 more than last week and $400 lower than this week last year.

Barge

For the week ending February 1, **barged grain movements** totaled 616,500 tons. This was 6 percent less than the previous week and 3 percent more than the same period last year.

For the week ending February 1, 392 grain barges **moved down river**—29 fewer than last week. There were 865 grain barges **unloaded** in the New Orleans region, 107 percent more than last week.

Ocean

For the week ending January 30, 29 **oceangoing grain vessels** were loaded in the Gulf—12 percent more than the same period last year. Within the next 10 days (starting January 31), 42 vessels were expected to be loaded—7 percent fewer than the same period last year.

As of January 30, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $44.75, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $25.75 per mt, down 2 percent from the previous week.

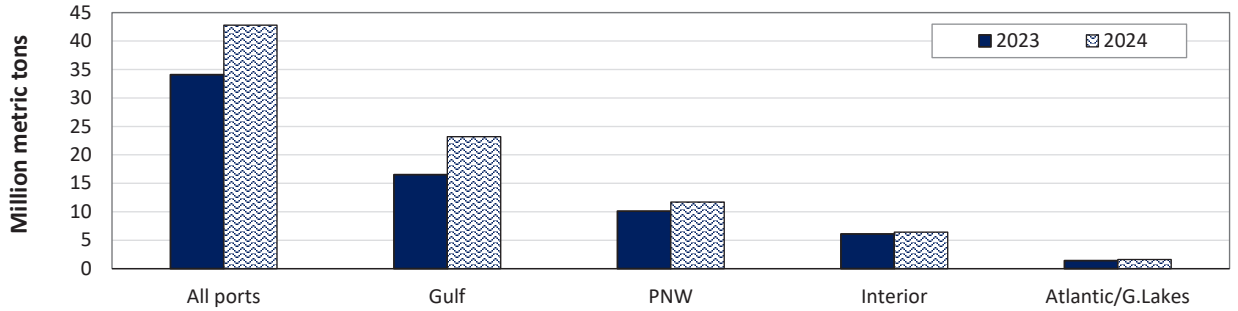
Fuel

For the week ending February 3, the U.S. average **diesel price** increased 0.1 cents from the previous week, to $3.66 per gallon—23.9 cents below the same week last year.

Fourth-Quarter 2024 Grain Inspections Rose From Previous Year

During fourth quarter 2024, grain inspections (corn, soybeans, and wheat) for export from all major U.S. ports totaled 42.8 million metric tons (mmt)—the highest level of fourth-quarter grain inspections since 2021, according to USDA's Federal Grain Inspection Service (FGIS). The amount of grain inspected was up 25 percent from fourth quarter 2023 (year to year) and up 8 percent from the prior 5-year average (fig. 1).

Figure 1. Fourth-quarter grain inspections by region



Source: USDA, Federal Grain Inspection Service.

The year-to-year increase in total inspections reflected a rise for all three commodities. The rise in corn inspections was due to higher inspections to Japan and Korea. Inspections of soybeans and wheat were also up. Soybeans rose because of higher inspections to China, Egypt, and Italy, and wheat rose because of increased inspections to Indonesia and Thailand.

For corn and wheat, the year-to-year gains offset declines in U.S. inspections to China. Corn inspections to China were down 98 percent year to year, in part owing to China's strong domestic corn crop, which lessened demand for corn imports. Wheat inspections to China were down 100 percent year to year, partly because China exceeded its tariff-rate quota for the calendar year. Above the quota, Chinese importers incur a 65-percent fee—a disincentive that weakened China's demand for wheat imports.

Both year to year and compared to the 5-year average, grain inspections rose in the Pacific Northwest (PNW), U.S. Gulf, and Interior port regions. In the Atlantic-Great Lakes port region, grain inspections were up year to year, but below the 5-year average.

According to USDA's January *World Agricultural Supply and Demand Estimates (WASDE) report*—from marketing year (MY) 2023/24 to MY 2024/25—exports were estimated to be up 20 percent for wheat, up 8 percent for soybeans, and up 7 percent for corn.

Grain Inspections by Region

U.S. Gulf. At 23.2 mmt, grain inspections in the U.S. Gulf rose 40 percent year to year and increased 9 percent from the 5-year average. The year-to-year increase reflected a large rise in soybean, wheat, and corn inspections—likely due to the absence of drought and full restoration of transits at the Panama Canal since the previous year. Of total fourth-quarter Gulf inspections, soybean inspections were 67 percent; corn inspections, 28 percent; and wheat inspections, 4 percent.

PNW. PNW grain inspections totaled 11.7 mmt—up 16 percent year to year and up 5 percent from the 5-year average. The year-to-year increase reflected a large rise in corn inspections and a moderate rise in soybean and wheat inspections. Of total fourth-quarter PNW inspections, soybean inspections were 64 percent; wheat inspections, 19 percent; and corn inspections, 17 percent.

Interior. Interior grain inspections were 6.4 mmt—up 5 percent year to year and up 20 percent from the 5-year average. The year-to-year increase owed to rises in soybean and wheat inspections. Of total fourth-quarter Interior inspections, corn inspections were 47 percent; soybean inspections, 44 percent; and wheat inspections, 9 percent.

Atlantic-Great Lakes. At 1.6 mmt, grain inspections in the Atlantic-Great Lakes were up 12 percent year to year, but down 7 percent from the 5-year average. The year-to-year increase reflected a large rise in corn inspections. Of total fourth-quarter Atlantic-Great Lakes inspections, soybean inspections were 57 percent; corn inspections, 27 percent; and wheat inspections, 16 percent.

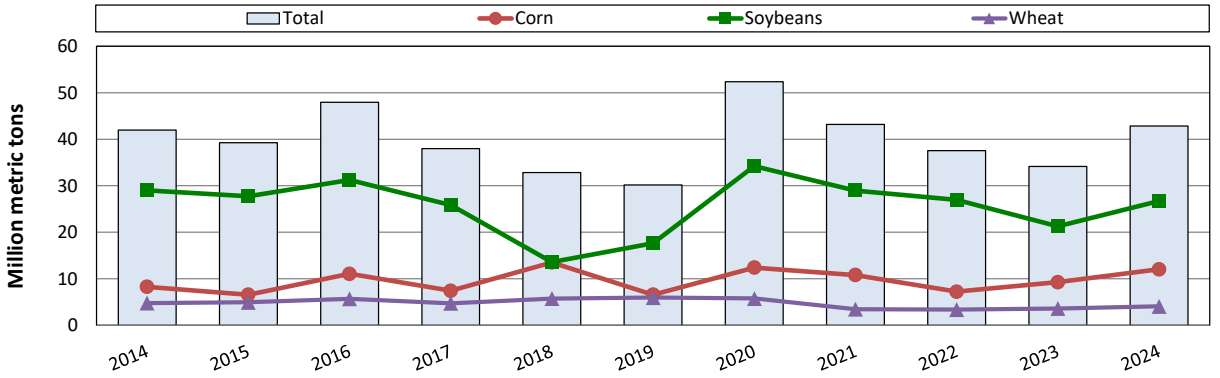
Inspections by Commodity

Corn. Fourth-quarter 2024 corn inspections were 12.0 mmt—up 30 percent both year to year and from the 5-year average (fig. 2). The year-to-year increase was primarily due to increased inspections destined to Japan and Korea. The rise helped offset a 98-percent year-to-year decline in corn inspections to China. During the fourth quarter, U.S. Gulf inspections were 6.6 mmt—up 39 percent year to year and 18 percent above the 5-year average.

Corn inspections in the Interior were 3.0 mmt—down 3 percent year to year, but up 17 percent from the 5-year average. At 2.0 mmt, PNW inspections of corn increased 55 percent year to year and rose 100 percent from the 5-year average. Finally, corn inspections in the Atlantic-Great Lakes were 0.4 mmt—up 308 percent year to year and up 549 percent from the 5-year average.

Soybeans. Fourth-quarter soybean inspections were 26.7 mmt—up 26 percent year to year and up 4 percent from the 5-year average (fig. 2). The year-to-year increase was mainly due to higher inspections destined to China, Egypt, and Italy. During the fourth quarter, U.S. Gulf soybean inspections were 15.5 mmt—up 41 percent year to year and up 7 percent from the 5-year average.

Figure 2. Fourth-quarter grain inspections by grain type



Source: USDA, Federal Grain Inspection Service.

At 7.5 mmt, PNW soybean inspections were up 11 percent year to year, but down 3 percent from the 5-year average. Interior soybean inspections were 2.8 mmt—up 11 percent year to year and up 26 percent from the 5-year average. At 0.9 mmt, Atlantic-Great Lakes inspections of soybeans were down 5 percent year to year and down 32 percent from the 5-year average.

Wheat. Fourth-quarter wheat inspections were 4.1 mmt—up 13 percent year to year, but down 8 percent from the 5-year average (fig. 2). The year-to-year increase was mainly due to higher inspections destined to Indonesia and Thailand. During the fourth quarter, PNW wheat inspections were 2.2 mmt—up 6 percent year to year, but down 10 percent from the 5-year average.

U.S. Gulf wheat inspections were 1.0 mmt—up 40 percent year to year, but down 12 percent from the 5-year average. At 0.6 mmt, wheat inspections in the Interior were up 31 percent year to year and up 11 percent from the 5-year average. Atlantic-Great Lakes wheat inspections were 0.2 mmt—down 30 percent year to year and down 16 percent from the 5-year average.

Market Outlook

USDA's January **WASDE report** projected MY 2024/25 corn exports to be 62.2 mmt—up 7 percent from the MY 2023/24 estimate. In the same report, USDA projected MY 2024/25 soybean exports to be 49.7 mmt—up 8 percent from the MY 2023/24 estimate. MY 2024/25 wheat exports were projected to be 23.1 mmt—up 20 percent from the MY 2023/2024 estimate. January projections of corn exports decreased from the December WASDE, and projections of soybean and wheat exports were unchanged.

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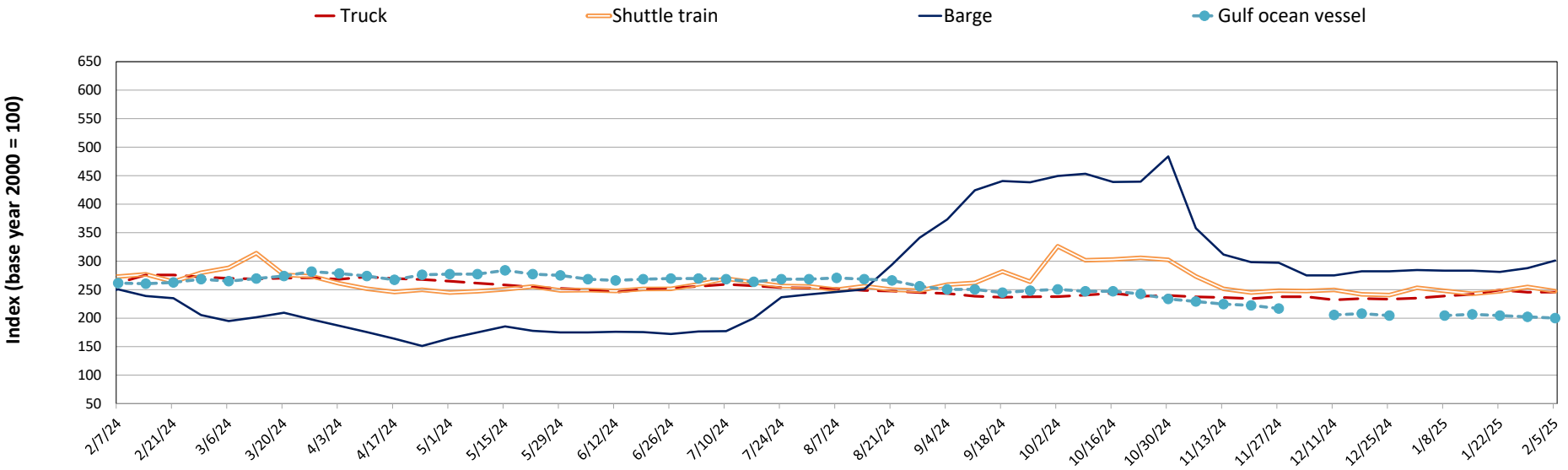
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
02/05/25	246	345	247	301	200	183
01/29/25	246	337	255	288	202	186
02/07/24	262	360	273	251	262	223

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.

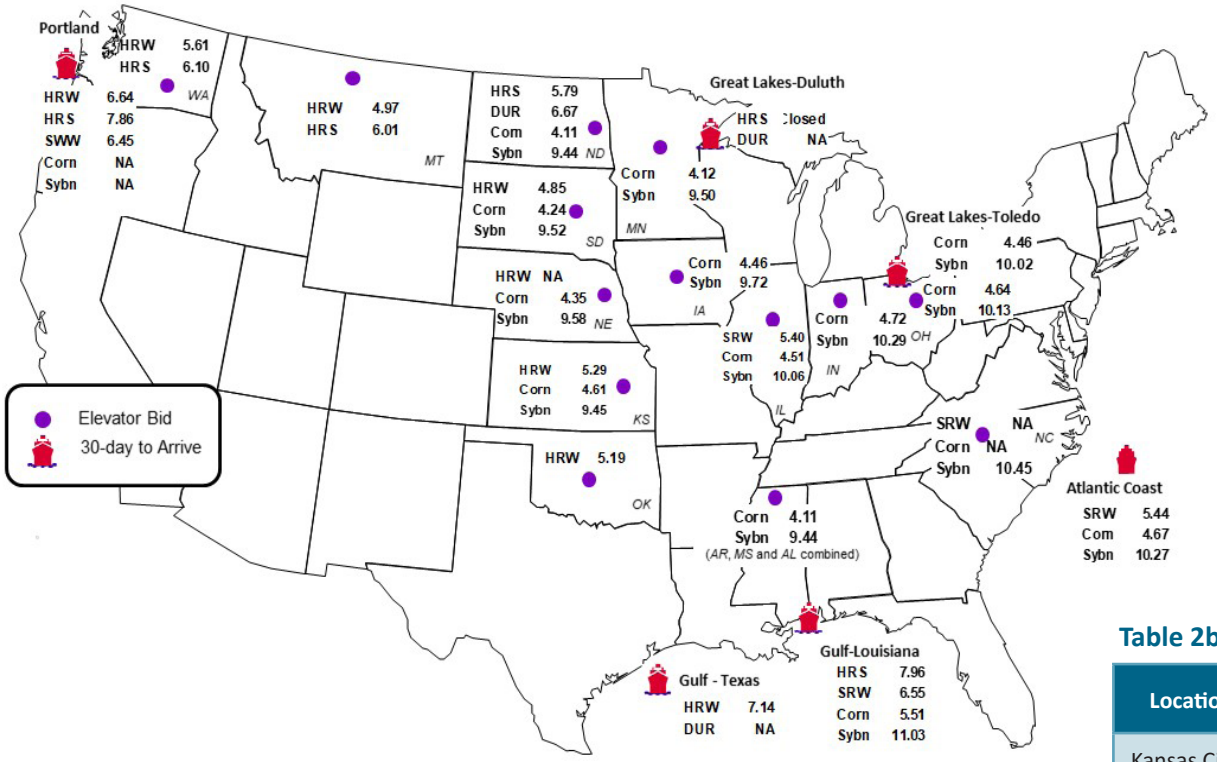
Figure 1. Grain transportation cost indicators as of week ending 2/5/25



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	1/31/2025	1/24/2025
Corn	IL–Gulf	-1.00	-0.97
Corn	NE–Gulf	-1.16	-1.11
Soybean	IA–Gulf	-1.31	-1.47
HRW	KS–Gulf	-1.85	-1.98
HRS	ND–Portland	-2.07	-2.10

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	1/31/2025	Week ago 1/24/2025	Year ago 2/2/2024
Kansas City	Wheat	Mar	5.810	5.556	6.150
Minneapolis	Wheat	Mar	6.154	5.952	6.996
Chicago	Wheat	Mar	5.614	5.386	5.916
Chicago	Corn	Mar	4.802	4.792	4.442
Chicago	Soybean	Mar	10.472	10.452	11.920

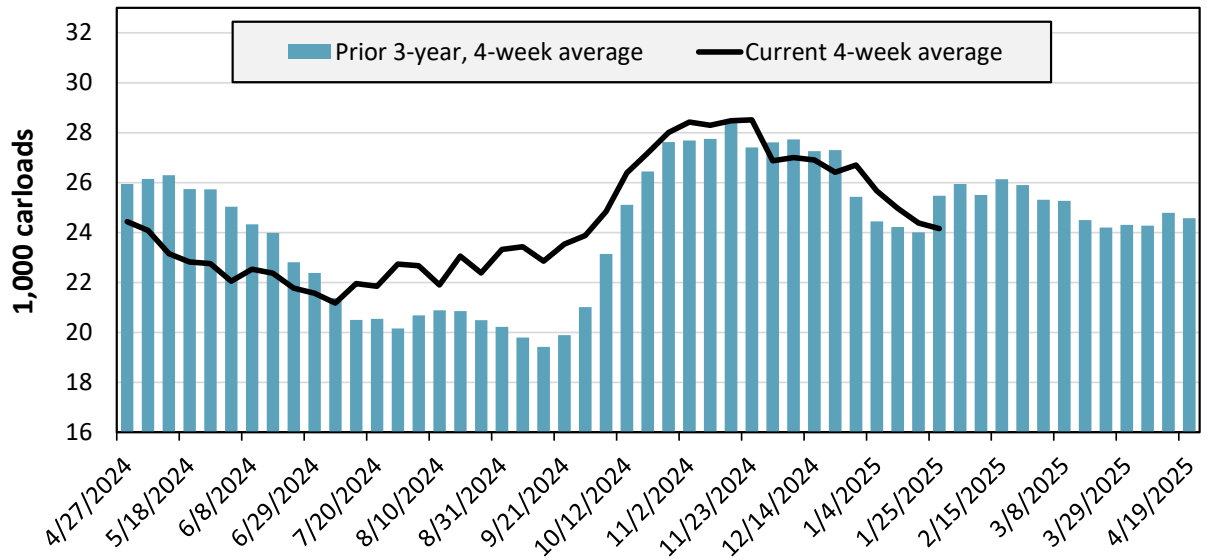
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 1/25/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,884	3,136	9,650	4,606	2,192	682	22,150
This week last year	1,940	2,929	11,359	4,797	2,905	1,205	25,135
2025 YTD	7,424	11,632	42,128	20,881	9,328	5,221	96,614
2024 YTD	7,573	11,254	39,220	19,173	11,535	4,590	93,345
2025 YTD as % of 2024 YTD	98	103	107	109	81	114	104
Last 4 weeks as % of 2024	98	103	107	109	81	114	104
Last 4 weeks as % of 3-yr. avg.	98	108	98	92	82	82	95
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 25, grain carloads were down 1 percent from the previous week, up 4 percent from last year, and down 5 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: 1/24/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	30.2	29.0	57.6	21.6	12.0	28.0	18.9	28.2
	Average over last 4 weeks	40.1	27.0	38.6	18.7	8.2	22.3	23.0	25.4
	Average of same 4 weeks last year	30.2	28.4	39.3	21.4	7.6	29.8	17.9	24.9
Grain unit train speeds (miles per hour)	This week	22.2	20.1	24.9	22.8	24.2	20.0	24.0	22.6
	Average over last 4 weeks	22.9	20.6	25.9	23.3	25.4	20.7	23.7	23.2
	Average of same 4 weeks last year	23.7	17.9	24.4	23.7	24.7	23.0	27.4	23.5

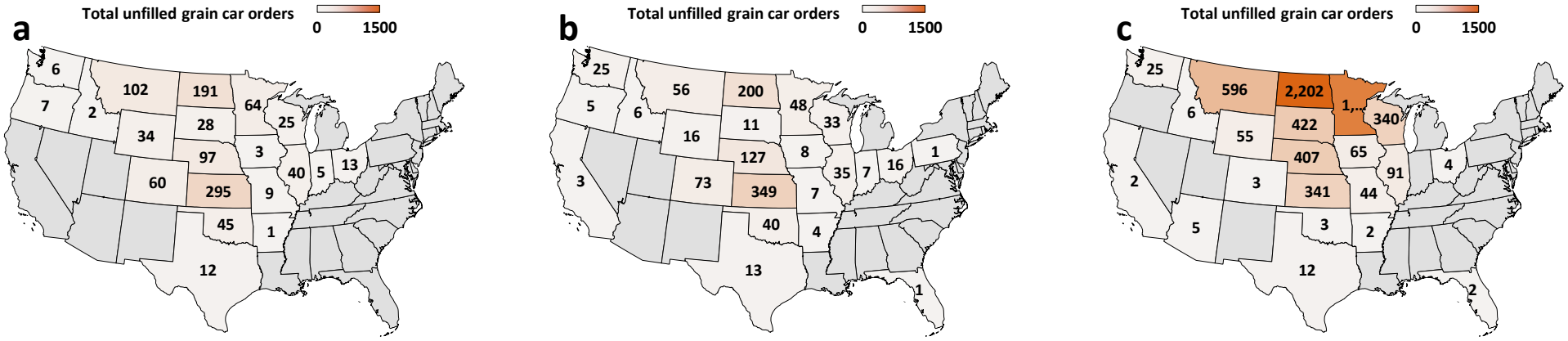
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 1/24/2025		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	67	5	493	84	6	86	3	744
	Average over last 4 weeks	42	5	414	93	5	67	31	656
	Average of same 4 weeks last year	34	10	716	176	6	50	43	1,034
Loaded grain cars not moved in over 48 hours (number)	This week	115	278	1,607	100	5	167	23	2,294
	Average over last 4 weeks	72	246	1,038	93	3	96	11	1,559
	Average of same 4 weeks last year	38	282	1,732	149	2	103	16	2,322
Grain unit trains held (number)	This week	1	0	23	6	1	2	1	34
	Average over last 4 weeks	0	0	20	6	1	2	2	31
	Average of same 4 weeks last year	0	4	28	7	0	5	6	50
Unfilled manifest grain car orders (number)	This week	18	18	504	470	0	29	0	1,039
	Average over last 4 weeks	21	10	437	572	0	44	13	1,096
	Average of same 4 weeks last year	5	0	5,244	267	0	310	57	5,883

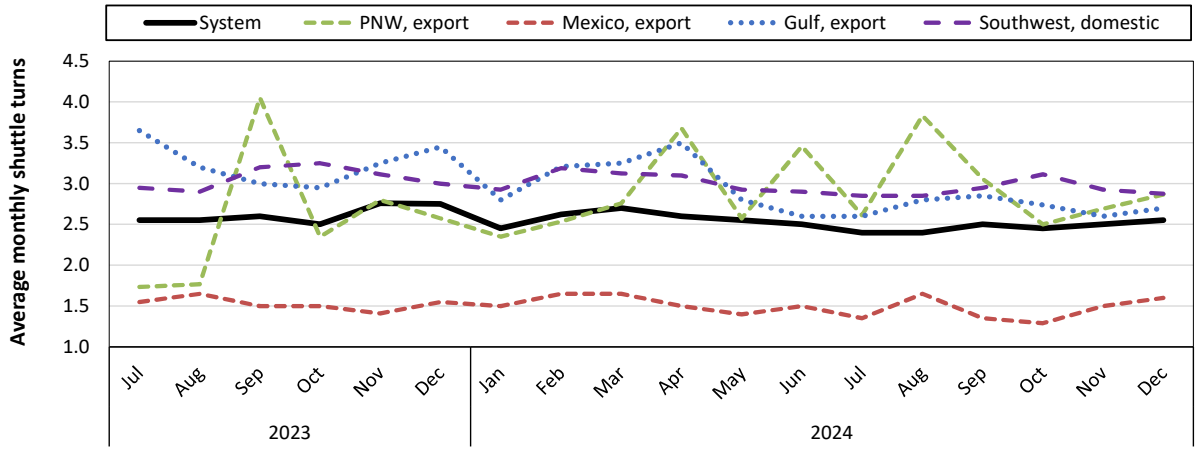
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).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

Figure 4. Unfilled manifest grain car orders by State for the week ending 1/24/2025 (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

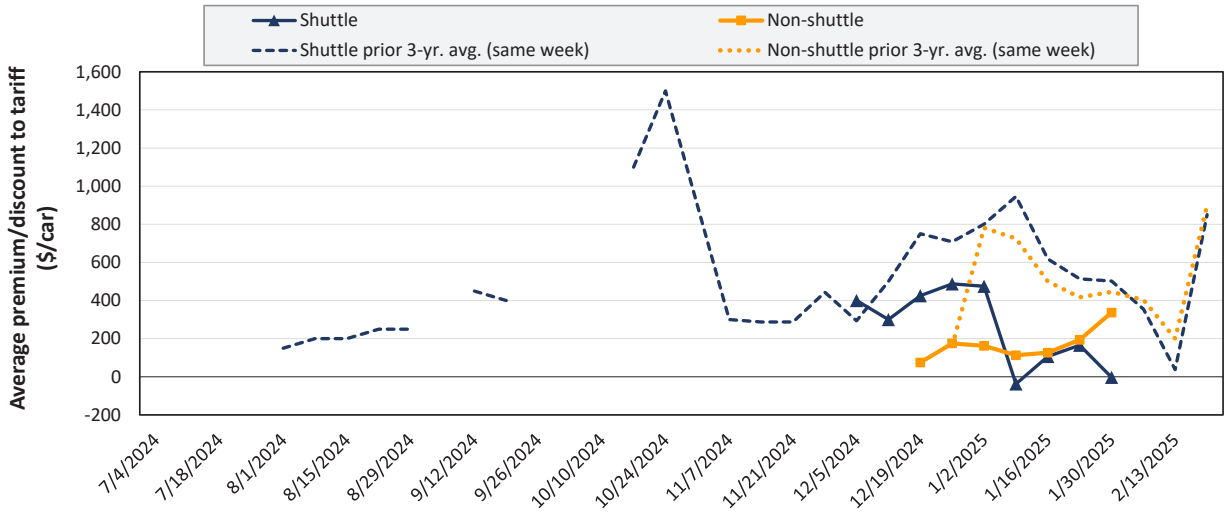


Average monthly systemwide grain shuttle turns for December 2024 were 2.55. By destination region, average monthly grain shuttle turns were 2.87 to PNW, 1.6 to Mexico, 2.7 to the Gulf, and 2.88 to the Southwest.

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 February 2025



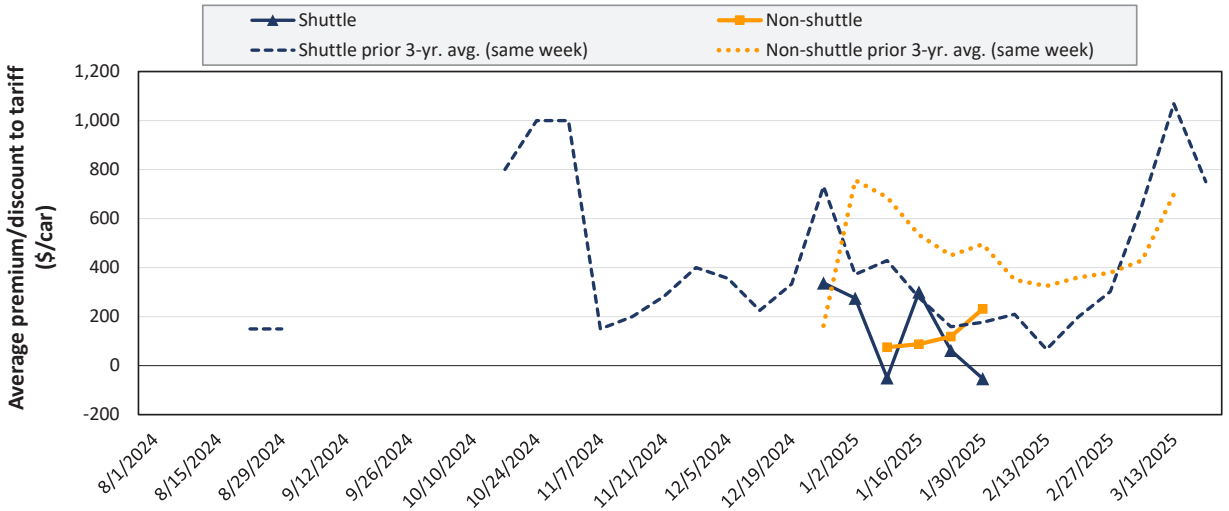
Average non-shuttle bids/offers rose $144 this week, and are at the peak.

Average shuttle bids/offers fell $169 this week and are $491 below the peak.

1/30/2025	BNSF	UP
Non-Shuttle	$600	$75
Shuttle	$275	-$281

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 March 2025



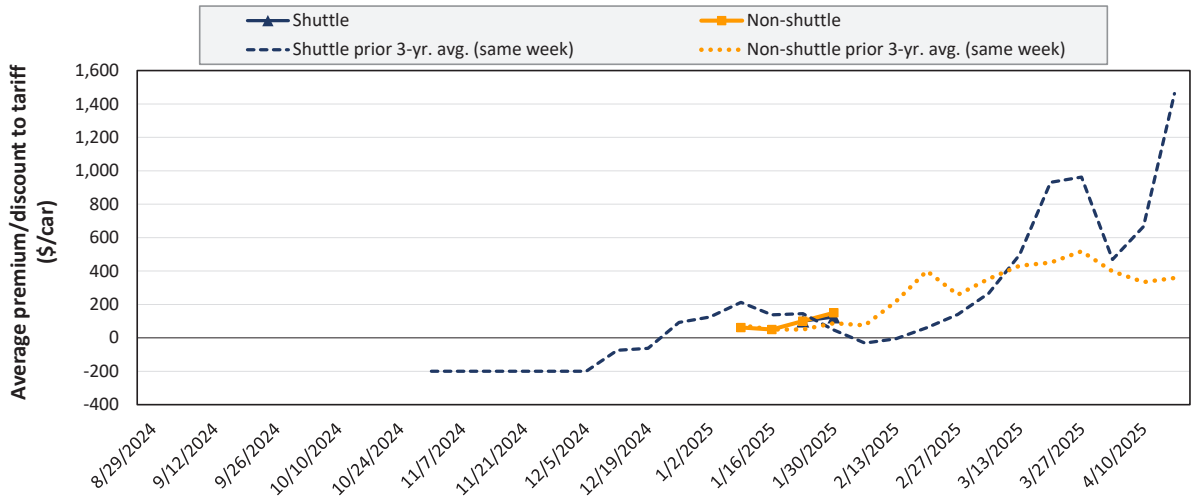
Average non-shuttle bids/offers rose $113 this week, and are at the peak.

Average shuttle bids/offers fell $116 this week and are $391 below the peak.

1/30/2025	BNSF	UP
Non-Shuttle	$400	$63
Shuttle	$169	-$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 April 2025



Average non-shuttle bids/offers rose $50 this week, and are at the peak.

Average shuttle bids/offers rose $25 this week and are at the peak.

1/30/2025	BNSF	UP
Non-Shuttle	$200	$100
Shuttle	$125	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: 1/30/2025		Delivery period					
		Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25
Non-shuttle	BNSF	600	400	200	100	n/a	n/a
	Change from last week	250	225	n/a	n/a	n/a	n/a
	Change from same week 2024	-650	-533	n/a	n/a	n/a	n/a
	UP	75	63	100	100	n/a	n/a
	Change from last week	37	-1	0	0	n/a	n/a
	Change from same week 2024	-150	-175	25	25	n/a	n/a
Shuttle	BNSF	275	169	125	n/a	n/a	n/a
	Change from last week	-288	-181	25	n/a	n/a	n/a
	Change from same week 2024	-575	-231	138	n/a	n/a	n/a
	UP	-281	-275	n/a	n/a	n/a	n/a
	Change from last week	-50	-50	n/a	n/a	n/a	n/a
	Change from same week 2024	-600	-175	n/a	n/a	n/a	n/a
	CPKC	17	100	n/a	n/a	n/a	n/a
	Change from last week	-83	175	n/a	n/a	n/a	n/a
	Change from same week 2024	-133	25	n/a	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, February 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	$142	$50.97	$1.39	20
	Grand Forks, ND	Duluth-Superior, MN	$3,862	$21	$38.56	$1.05	9
	Wichita, KS	Los Angeles, CA	$7,020	$107	$70.78	$1.93	-0
	Wichita, KS	New Orleans, LA	$4,425	$249	$46.42	$1.26	-9
	Sioux Falls, SD	Galveston-Houston, TX	$6,966	$88	$70.05	$1.91	3
	Colby, KS	Galveston-Houston, TX	$4,675	$273	$49.14	$1.34	-9
	Amarillo, TX	Los Angeles, CA	$5,585	$380	$59.23	$1.61	6
Corn	Champaign-Urbana, IL	New Orleans, LA	$5,385	$282	$56.27	$1.43	3
	Toledo, OH	Raleigh, NC	$8,877	$0	$88.15	$2.24	0
	Des Moines, IA	Davenport, IA	$3,619	$60	$36.53	$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	$175	$48.46	$1.23	5
	Des Moines, IA	Los Angeles, CA	$6,585	$510	$70.46	$1.79	1
Soybeans	Minneapolis, MN	New Orleans, LA	$3,468	$398	$38.39	$1.04	4
	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	$282	$55.63	$1.51	3

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, February 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	5
	Wichita, KS	Galveston-Houston, TX	$4,411	$48	$44.28	$1.21	5
	Chicago, IL	Albany, NY	$7,413	$0	$73.61	$2.00	0
	Grand Forks, ND	Portland, OR	$6,001	$106	$60.65	$1.65	2
	Grand Forks, ND	Galveston-Houston, TX	$5,446	$109	$55.17	$1.50	2
	Garden City, KS	Portland, OR	$6,695	$136	$67.84	$1.85	-
Corn	Minneapolis, MN	Portland, OR	$5,510	$130	$56.00	$1.42	-6
	Sioux Falls, SD	Tacoma, WA	$5,470	$119	$55.50	$1.41	-6
	Champaign-Urbana, IL	New Orleans, LA	$4,625	$282	$48.73	$1.24	4
	Lincoln, NE	Galveston-Houston, TX	$4,860	$69	$48.95	$1.24	4
	Des Moines, IA	Amarillo, TX	$5,125	$220	$53.08	$1.35	4
	Minneapolis, MN	Tacoma, WA	$5,510	$129	$55.99	$1.42	-6
	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	-5
	Minneapolis, MN	Portland, OR	$6,235	$130	$63.20	$1.72	-6
	Fargo, ND	Tacoma, WA	$6,085	$105	$61.47	$1.67	-5
	Council Bluffs, IA	New Orleans, LA	$5,550	$325	$58.34	$1.59	3
	Toledo, OH	Huntsville, AL	$5,564	$0	$55.25	$1.50	1
	Grand Island, NE	Portland, OR	$6,185	$458	$65.97	$1.80	2

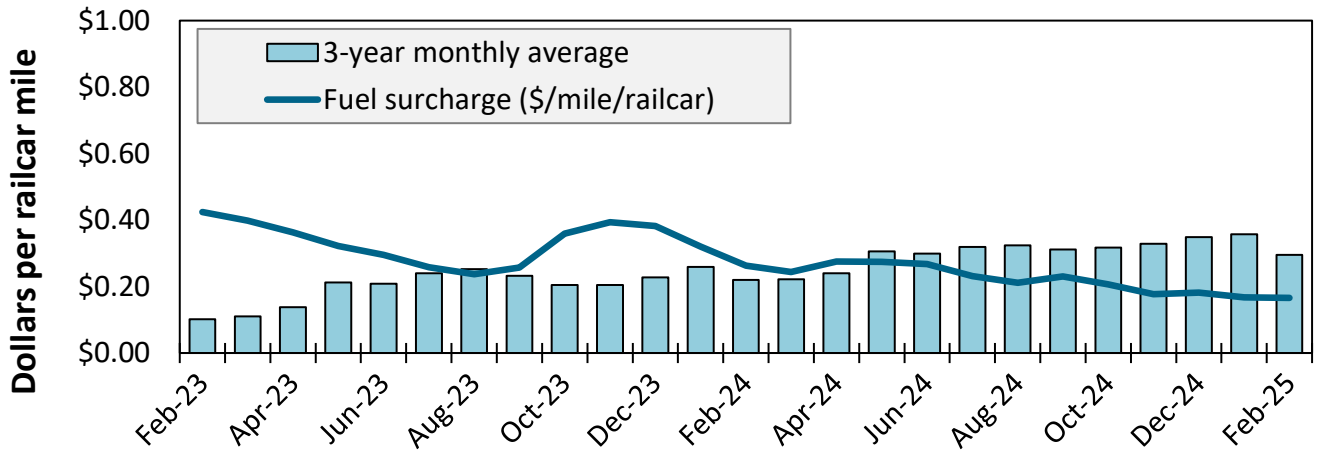
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, February 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	0.0	3.2
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,514	$54.27	$1.38	-0.2	-0.8
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	$6,033	$59.38	$1.51	-0.2	-1.0
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,422	$53.36	$1.36	-0.2	-0.7
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,633	$55.44	$1.41	-0.2	-0.8
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,043	$49.63	$1.26	-0.2	3.1
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,176	$50.94	$1.29	-0.3	2.9
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,071	$49.91	$1.27	0.0	3.7
Soybeans	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,514	$54.27	$1.48	-0.2	-0.8
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$5,401	$53.16	$1.45	0.0	-2.4
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,590	$64.86	$1.77	-0.2	2.5
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$5,402	$53.17	$1.45	0.0	-2.4
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,422	$53.36	$1.45	-0.2	-0.7
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,691	$65.85	$1.79	-0.2	2.3
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,956	$38.94	$1.06	0.0	-0.4
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$3,538	$34.82	$0.95	0.0	0.1
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,780	$47.05	$1.28	-0.2	-9.3
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,422	$53.36	$1.45	-0.2	-0.7
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,570	$44.98	$1.22	-0.2	-9.5

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).

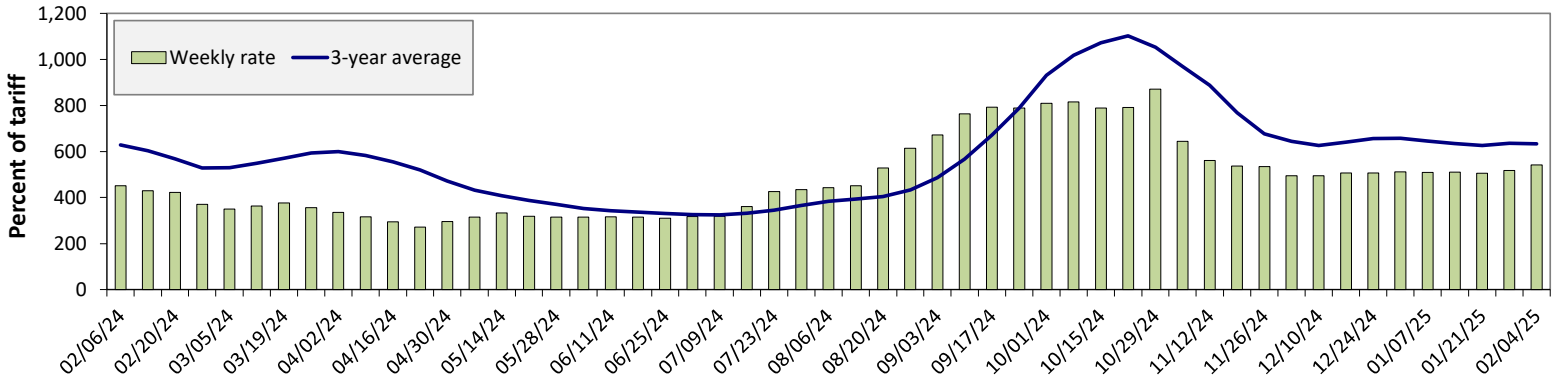
Figure 9. Railroad fuel surcharges, North American weighted average



February 2025: $0.17/mile, unchanged from last month’s surcharge of $0.17/mile; down 9 cents from the February 2024 surcharge of $0.26/mile; and down 13 cents from the February prior 3-year average of $0.3/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending February 4: 5 percent higher than the previous week; 20 percent higher than last year; and 14 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

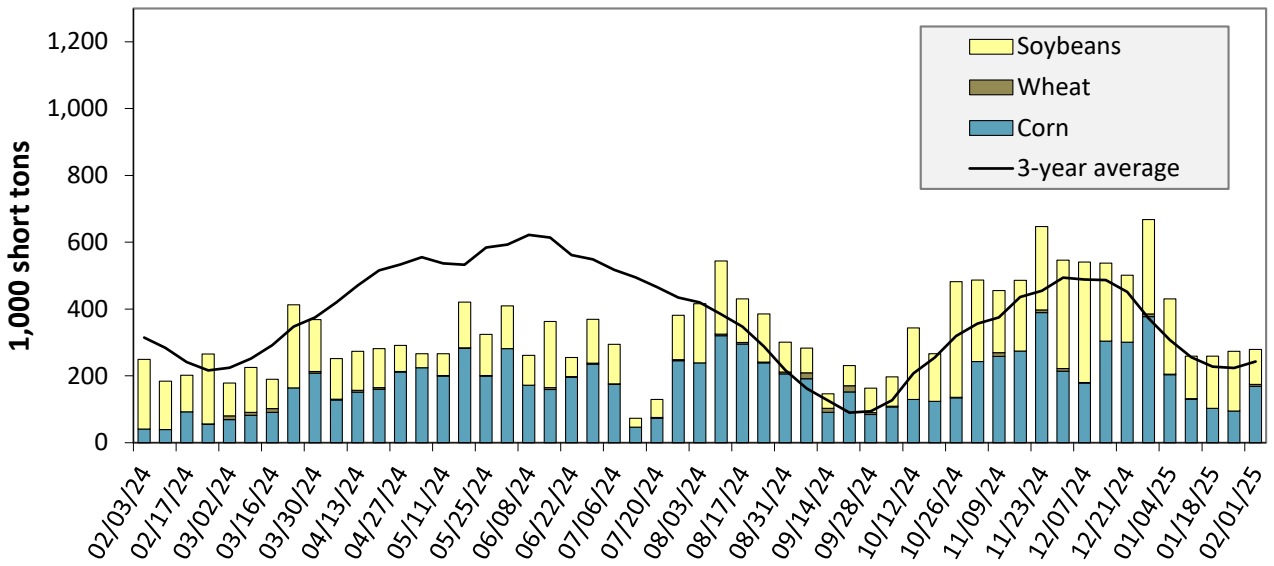
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	2/4/2025	n/a	n/a	542	398	379	294
	1/28/2025	n/a	n/a	518	370	356	264
$/ton	2/4/2025	n/a	n/a	25.15	15.88	17.78	9.23
	1/28/2025	n/a	n/a	24.04	14.76	16.70	8.29
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	n/a	n/a	20	13	-13	-5
	3-year avg.	n/a	n/a	-14	-21	-31	-28
Rate	March	n/a	478	448	356	358	273
	May	457	403	394	319	319	260

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 February 1: 12 percent higher than last year and 15 percent higher than the 3-year average.

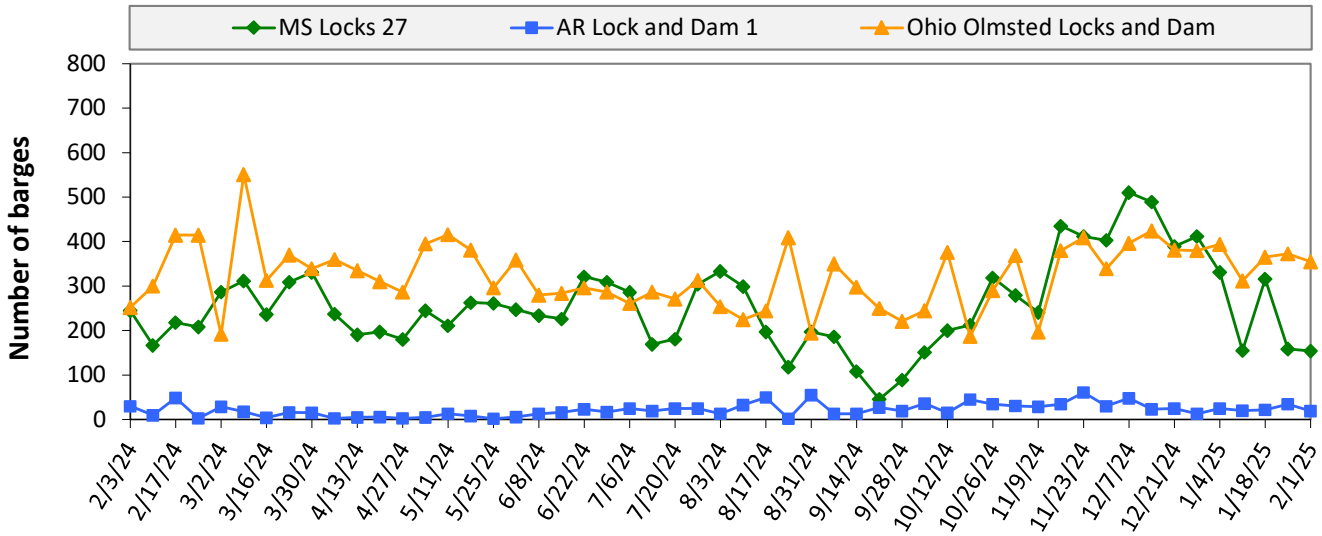
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 02/01/2025	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))	149	5	136	0	289
Mississippi River (Granite City, IL (L27))	169	5	105	0	280
Illinois River (La Grange)	164	0	130	0	294
Ohio River (Olmsted)	204	4	98	0	305
Arkansas River (L1)	0	10	22	0	32
Weekly total - 2025	374	18	225	0	617
Weekly total - 2024	152	26	415	5	598
2025 YTD	1,406	49	1,380	18	2,852
2024 YTD	777	71	1,500	14	2,362
2025 as % of 2024 YTD	181	69	92	126	121
Last 4 weeks as % of 2024	181	94	76	400	109
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. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

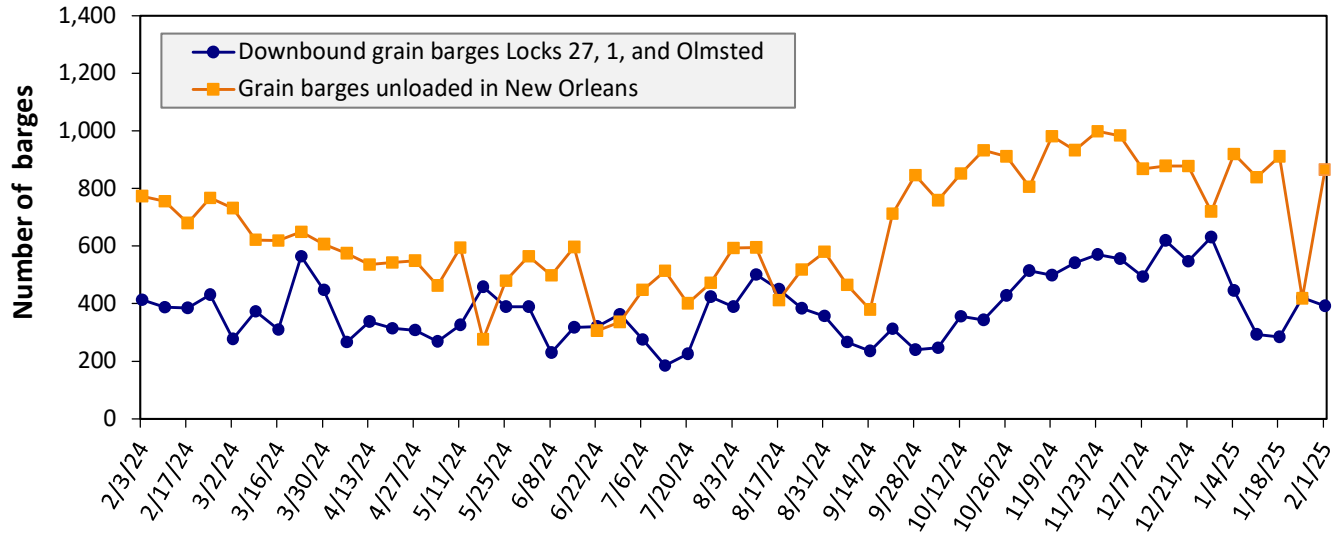
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending February 1: 528 barges transited the locks, 39 barges fewer than the previous week, and 5 percent higher than the 3-year average.

Note: The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

Figure 14. Grain barges for export in New Orleans region



For the week ending February 1: 392 barges moved down river, 29 fewer than the previous week; 865 grain barges unloaded in the New Orleans Region, 107 percent more than the previous week

Note: Olmsted = Olmsted Locks and Dam. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
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	
		February 2025	January 2025	February 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.35	$21.50	$21.01	1.7	5.1
	Central Ferry, WA/Almota, WA	$20.45	$20.60	$20.14	1.6	4.9
	Lyons Ferry, WA	$19.44	$19.59	$19.17	1.4	4.6
	Windust, WA/Lower Monumental, WA	$18.41	$18.56	$18.18	1.3	4.3
	Sheffler, WA	$18.38	$18.53	$18.15	1.3	4.3
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.18	$17.33	$17.00	1.1	3.9
	Port Kelly, WA/Wallula, WA	$16.96	$17.11	$16.79	1.1	3.8
	Umatilla, OR	$16.86	$17.01	$16.69	1.1	3.8
	Boardman, OR/Hogue Warner, OR	$16.60	$16.75	$16.44	1.0	3.7
	Arlington, OR/Roosevelt, WA	$16.44	$16.59	$16.29	1.0	3.7
	Biggs, OR	$15.11	$15.26	$15.01	0.7	3.1
	The Dalles, OR	$14.01	$14.16	$13.95	0.5	2.6

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)

January, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	385	0	385
Columbia River (Bonneville Lock and Dam (L1))	402	0	402
Monthly total 2024	402	0	402
Monthly total 2023	271	0	271
2024 YTD	402	0	402
2023 YTD	271	0	271

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.

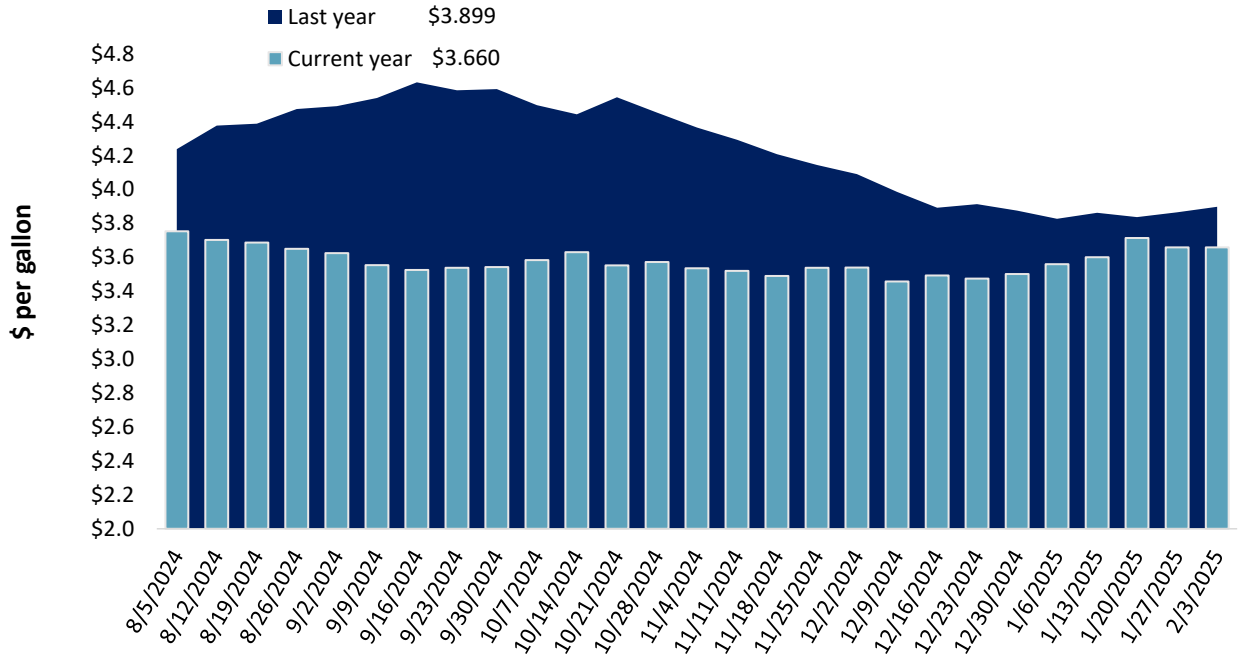
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 2/3/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.778	-0.027	-0.265
	New England	3.968	0.007	-0.356
	Central Atlantic	3.986	-0.009	-0.289
	Lower Atlantic	3.682	-0.036	-0.247
II	Midwest	3.568	0.000	-0.170
III	Gulf Coast	3.395	0.017	-0.307
IV	Rocky Mountain	3.471	0.040	-0.179
V	West Coast	4.289	0.015	-0.262
	West Coast less California	3.857	0.034	-0.197
	California	4.787	-0.006	-0.334
Total	United States	3.660	0.001	-0.239

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 February 3, the U.S. average diesel fuel price increased 0.1 cents from the previous week to $3.66 per gallon, 23.9 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 1/23/2025	1,042	687	1,563	1,379	131	4,801	22,357	9,682	36,840
	This week year ago	916	2,327	1,662	1,034	158	6,097	17,418	10,817	34,332
	Last 4 wks. as % of same period 2023/24	113	30	91	142	81	80	125	102	110
Current shipped (cumulative) exports sales	2024/25 YTD	3,200	1,969	4,342	3,611	227	13,349	20,933	33,001	67,283
	2023/24 YTD	2,044	2,141	3,856	2,445	292	10,778	16,271	27,296	54,345
	YTD 2024/25 as % of 2023/24	157	92	113	148	78	124	129	121	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 1/23/2025	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	16,170	15,660	3	17,746
Japan	6,190	4,992	24	9,366
China	32	1,837	-98	8,233
Colombia	4,180	2,974	41	4,383
Korea	2,162	866	150	1,565
Top 5 importers	28,735	26,329	9	41,293
Total U.S. corn export sales	43,290	33,689	28	51,170
% of YTD current month's export projection	70%	58%	-	-
Change from prior week	1,359	1,207	-	-
Top 5 importers' share of U.S. corn export sales	66%	78%	-	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 1/23/2025	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	20,216	20,855	-3	28,636
Mexico	3,556	3,529	1	4,917
Japan	1,367	1,468	-7	2,231
Egypt	1,819	481	278	2,228
Indonesia	1,076	1,002	7	1,910
Top 5 importers	28,034	27,336	3	39,922
Total U.S. soybean export sales	42,683	38,113	12	51,302
% of YTD current month's export projection	86%	83%	-	-
Change from prior week	438	165	-	-
Top 5 importers' share of U.S. soybean export sales	66%	72%	-	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 1/23/2025	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	3,305	2,691	23	3,298
Philippines	2,331	2,355	-1	2,494
Japan	1,749	1,627	8	2,125
China	139	2,395	-94	1,374
Korea	2,035	1,119	82	1,274
Taiwan	849	910	-7	921
Nigeria	430	203	112	920
Thailand	772	444	74	552
Colombia	349	233	50	522
Vietnam	405	360	13	313
Top 10 importers	12,365	12,336	0	13,792
Total U.S. wheat export sales	18,151	16,875	8	18,323
% of YTD current month's export projection	78%	88%		-
Change from prior week	456	323	-	-
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.

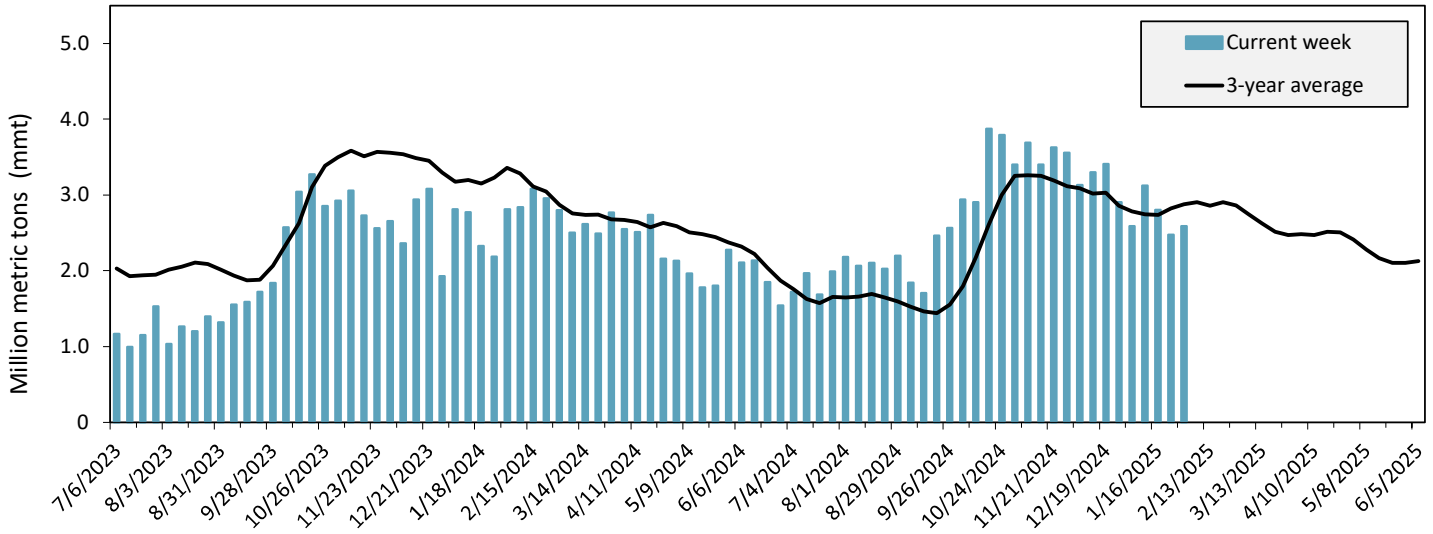
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 01/30/2025	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	401	376	107	1,888	933	202	218	258	13,987
	Soybeans	177	135	131	853	1,081	79	71	44	10,445
	Wheat	133	398	33	815	767	106	108	94	11,453
	All grain	780	909	86	3,625	2,909	125	129	107	37,186
Mississippi Gulf	Corn	648	698	93	2,846	1,696	168	182	144	27,407
	Soybeans	639	373	171	2,821	3,170	89	86	74	29,741
	Wheat	44	40	111	220	310	71	72	92	4,523
	All grain	1,331	1,111	120	5,887	5,231	113	114	98	61,789
Texas Gulf	Corn	7	4	175	21	40	53	51	42	570
	Soybeans	0	0	n/a	0	0	n/a	n/a	n/a	741
	Wheat	45	0	n/a	94	81	115	115	64	1,940
	All grain	53	5	n/a	126	483	26	26	26	6,965
Interior	Corn	196	168	117	825	983	84	89	99	13,463
	Soybeans	138	131	105	554	778	71	72	73	8,058
	Wheat	30	47	65	204	184	111	102	90	2,947
	All grain	367	346	106	1,597	1,963	81	84	87	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	0	n/a	11	12	93	93	157	653
	All grain	0	0	n/a	11	12	93	93	143	1,060
Atlantic	Corn	0	5	10	34	16	208	289	223	410
	Soybeans	8	98	9	167	213	79	78	67	1,272
	Wheat	0	0	n/a	0	5	0	n/a	n/a	73
	All grain	9	103	9	202	234	86	87	74	1,754
All Regions	Corn	1,252	1,251	100	5,614	3,668	153	165	156	56,109
	Soybeans	1,013	738	137	4,499	5,295	85	82	66	50,864
	Wheat	253	485	52	1,343	1,359	99	99	90	21,589
	All grain	2,591	2,474	105	11,552	10,886	106	108	96	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.

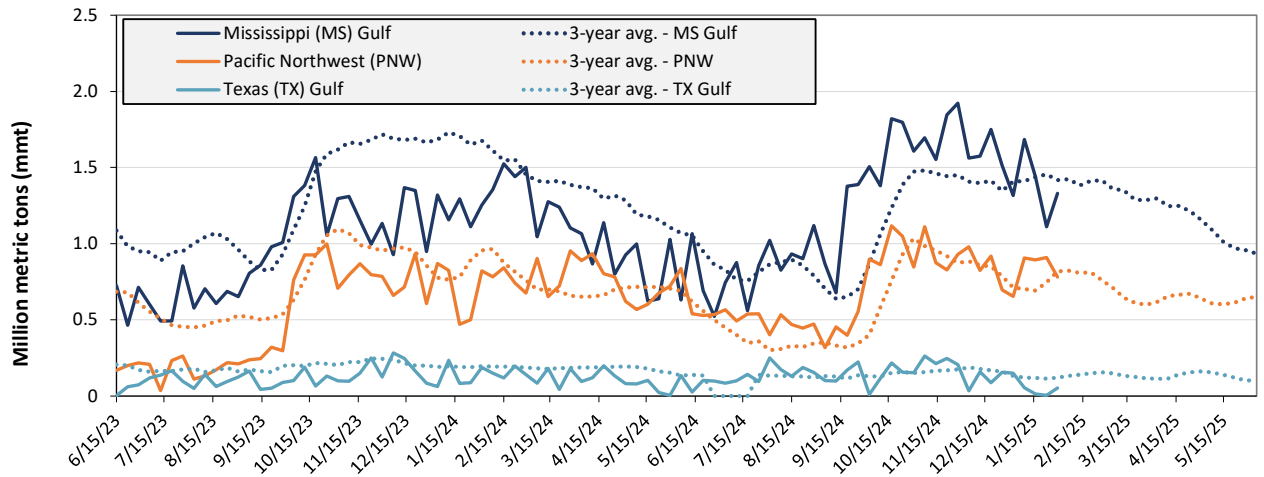
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jan. 30: 2.6 mmt of grain inspected, up 5 percent from the previous week, up 11 percent from the same week last year, and down 10 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 01/30/25 inspections (mmt):
MS Gulf: 1.33
PNW: 0.78
TX Gulf: 0.05

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 20	up 1005	up 24	down 14
Last year (same 7 days)	up 28	down 61	up 18	up 35
3-year average (4-week moving average)	down 6	down 56	down 10	down 5

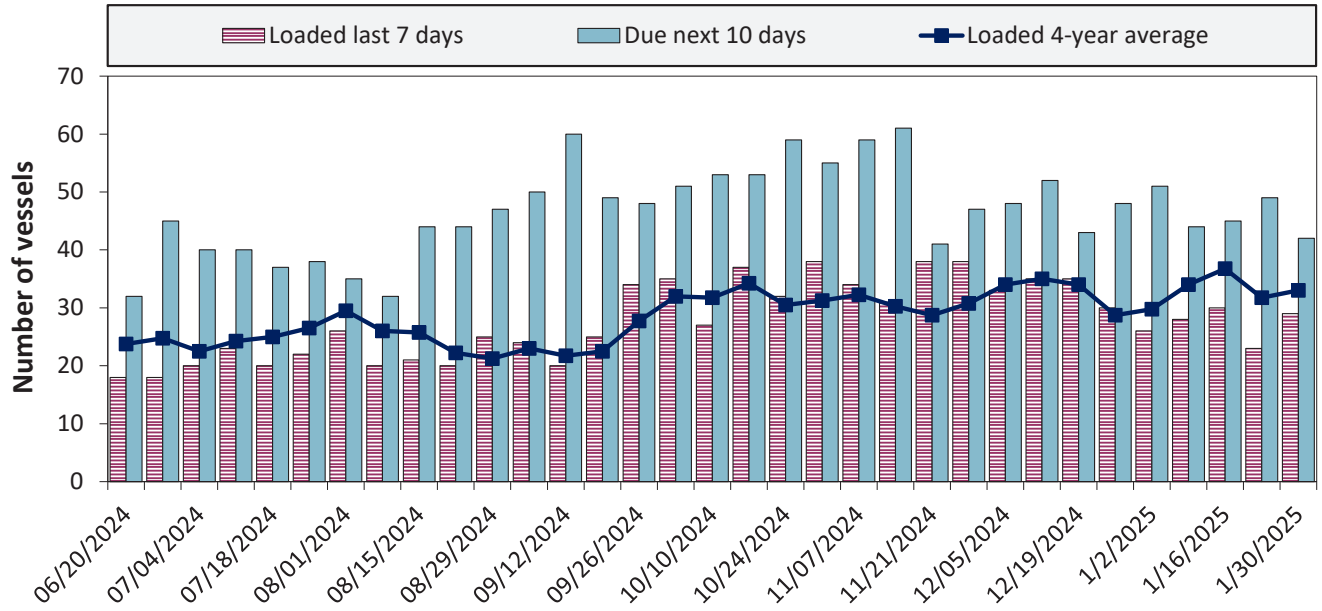
Source: USDA, Federal Grain Inspection Service.

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
1/30/2025	34	29	42	21
1/23/2025	22	23	49	15
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.

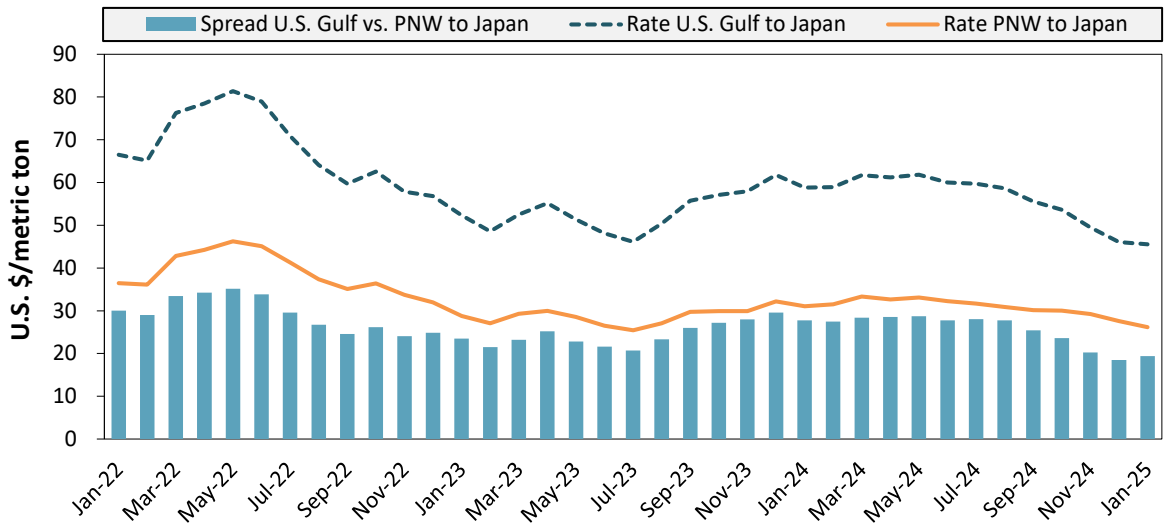
Figure 19. U.S. Gulf vessel loading activity



Week ending 1/30/25, number of vessels	Loaded	Due
Change from last year	12%	-7%
Change from 4-year average	-12%	-14%

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
January 2025	$46	$26	$19
Change from January 2024	-23%	-16%	30%
Change from 4-year average	-18%	-15%	-23%

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

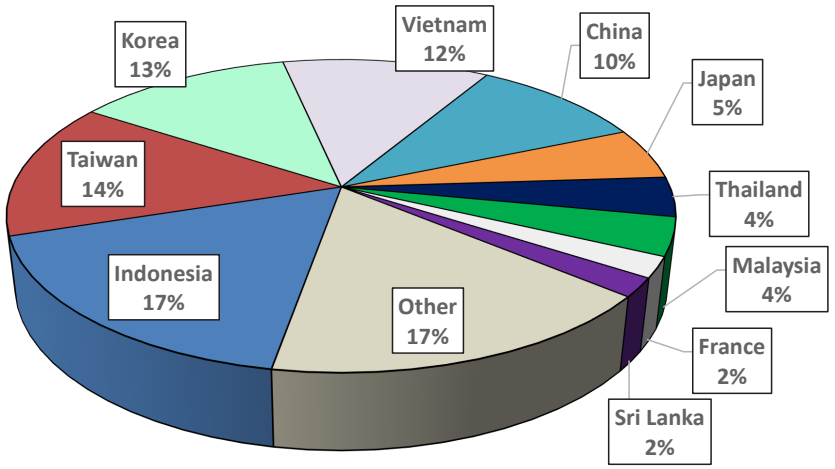
Table 20. Ocean freight rates for selected shipments, week ending 2/1/2025

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	Jan 23, 2025	Feb 8/12, 2025	66,000	43.75
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	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	N. China	Heavy grain	Jan 23, 2025	Feb 25/Mar 5, 2025	63,000	30.50
Brazil	China	Heavy grain	Jan 23, 2025	Feb 14/20, 2025	63,000	30.00
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	Indonesia	Heavy grain	Jan 23, 2025	Feb 23/24, 2025	62,000	34.50
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
Ukraine	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.

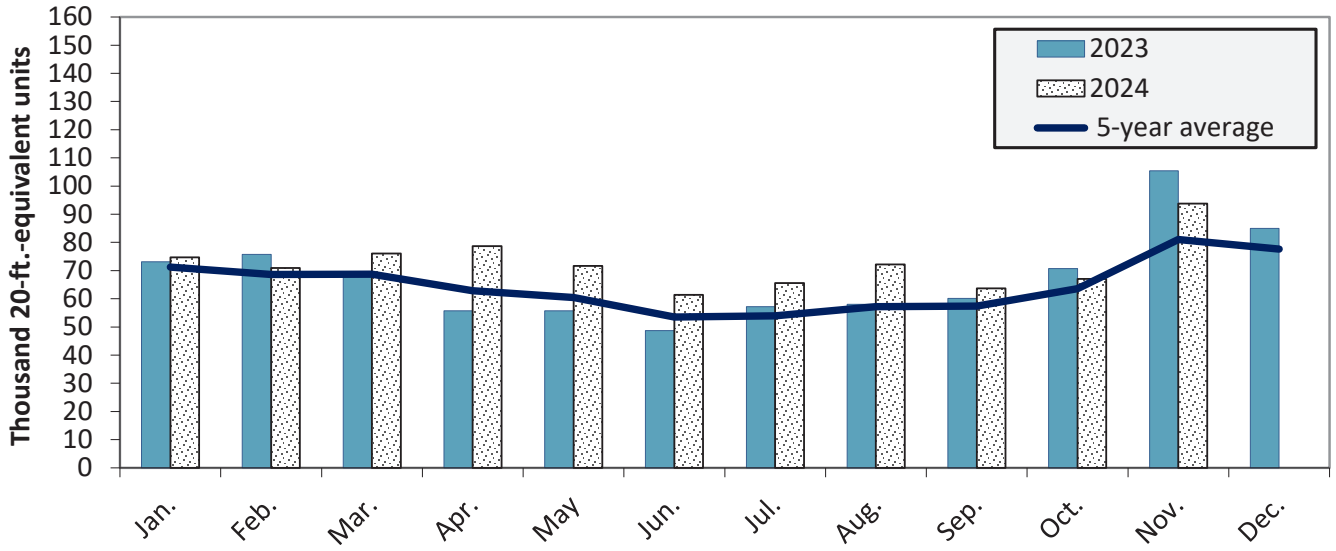
In 2023, containers were used to transport 14 percent of total U.S. waterborne grain exports. Approximately 62 percent of U.S. waterborne grain exports in 2023 went to Asia, of which 20 percent were moved in containers. Approximately 90 percent of U.S. waterborne containerized grain exports were destined 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, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, 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 11.0 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, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.
Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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Additional Transportation Research and Analysis resources include the ***Grain Truck and Ocean Rate Advisory (GTOR)***, the ***Mexico Transport Cost Indicator Report***, and the ***Brazil Soybean Transportation Report***.

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