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Grain Transportation Report

February 20, 2025

A weekly publication of the Agricultural Marketing Service

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Winter Weather Delays Barge Movements on the Mississippi River System. According to [American Commercial Barge Line](#), on February 17, a safety advisory was issued for a large portion of the Ohio River. Southbound traffic is restricted to daylight transit only, and the Cincinnati Harbor is closed because of unsafe conditions. High water in the harbor and the river is producing strong currents that can make barges unsafe to load.

Also, since February 17—besides the Ohio River high-water disruptions—low water has disrupted both Mississippi River traffic at St. Louis, MO, and the Illinois River traffic, by forcing 9-foot (or 25-percent) reductions in draft sizes.

Before February 17, the Mississippi, Ohio, and Illinois Rivers were already contending with 24- to 28-hour service delays. Since the 17th, freezing temperatures and winter storms in the Midwest, have made those delays even longer. Delays will continue until conditions improve.

Severe Flooding Impacts Railroads in Southeast. Earlier this week, a [powerful storm](#) swept through portions of Appalachia and the Southeast—resulting in widespread flooding and damaging winds.

On February 17, Norfolk Southern Railway (NS) [reported](#) that its route between Portsmouth, OH, and Bluefield, WV—part of NS’s “Heartland Corridor”—is “currently impassible.” Key to bulk corn transportation, NS’s Heartland Corridor was used to ship 2-4 million tons of corn in 2015—mainly, to Southeastern livestock and poultry operations. (See flow maps in [The Role of Rail in Agricultural Transportation](#) on

AgTransport.) The Heartland Corridor also connects the Midwest to the Norfolk International Terminals at the Port of Virginia, facilitating containerized grain exports.

CSX Transportation (CSX)—the other Class I railroad serving the Eastern United States—has also been impacted by the recent storms. On February 17, CSX [indicated](#) that areas across the CSX network (including Cincinnati, OH) had been disrupted by downed power lines and disabled switches.

Corn Exports Reach All-Time High for Time of Year. According to [USDA’s Federal Grain Inspection Service](#), 1.6 million metric tons (mmt) of corn were inspected for export in the week ending February 13 ([Grain Transportation Report table 18](#)). This quantity is a marketing-year high and an all-time record for the sixth week of the year—11 percent higher than the previous record (set in the week ending February 10, 2022).

Of the 1.6 mmt of corn exported, 49 percent departed from the U.S. Gulf; 37 percent from the Pacific Northwest; and 14 percent from the Interior. The top destinations were Mexico (28 percent); Japan (16 percent); Vietnam (13 percent); Korea (13 percent); and Spain (12 percent).

If historical patterns persist, corn exports will continue to rise in the coming months—a trend that would likely raise rail and barge grain transportation demand. In 2020-24, 35 percent of U.S. corn export inspections occurred from March to May.

Iowa Extends Weight-Limit Suspension and Waives HOS Rules for Hauling Fuel. Iowa has [reextended](#), through March 8, 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, [reextended](#) through February 28, another Iowa emergency proclamation waives hours-of-service (HOS) 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 February 6, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 35.70 million metric tons (mmt), down 2 percent from last week and up 9 percent from the same time last year.

Net [corn export sales](#) for MY 2024/25 were 1.65 mmt, up 12 percent from last week. Net [soybean export sales](#) were 0.19 mmt, down 52 percent from last week. Net [wheat export sales](#) for MY 2024/25 were 0.57 mmt, up 30 percent from last week.

Rail

U.S. Class I railroads originated 25,492 [grain carloads](#) during the week ending February 8. This was unchanged from the previous week, 2 percent fewer than last year, and 2 percent more than the 3-year average.

Average February [shuttle secondary railcar bids/offers](#) (per car) were \$1,025 above tariff for the week ending February 13. This was \$683 more than last week. Average non-shuttle secondary railcar bids/offers per car were \$600 above tariff. This was \$306 more than last week.

Average March shuttle secondary railcar bids/offers (per car) were \$600 above tariff for the week ending February 13. This was \$406 more than last week and \$229 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$296 above tariff. This was \$50 more than last week and \$360 lower than this week last year.

Barge

For the week ending February 15, [barged grain movements](#) totaled 670,550 tons. This was 8 percent more than the previous week and 25 percent more than the same period last year.

For the week ending February 15, 423 grain barges [moved down river](#)—34 more than last week. There were 703 grain barges [unloaded](#) in the New Orleans region, 10 percent more than last week.

Ocean

For the week ending February 13, 28 [oceangoing grain vessels](#) were loaded in the Gulf—3 percent fewer than the same period last year. Within the next 10 days (starting February 14), 53 vessels were expected to be loaded—33 percent more than the same period last year.

As of February 13, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$46.25, up 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$27.00 per mt, up 1 percent from the previous week.

Fuel

For the week ending February 17, the U.S. average [diesel price](#) increased 1.2 cents from the previous week, to \$3.677 per gallon—43.2 cents below the same week last year.



High Winter Stocks of Grain Boost Barge and Rail Transportation

This article uses grain stocks at the national and State levels to shed light on transportation demand in grain exports, barge movements, and rail movements, during last December and this January. Stocks were notably low in Ohio and North Carolina—an important rail corridor for Southeastern feed. Overall, December 1 grain stocks were high, nationally as well as in several River and Western rail States. Since December 1, barge and rail have been strong—particularly, barge in December ([GTR fig. 12](#)) and rail in January ([GTR fig. 3](#)), corresponding with higher export transportation demand ([GTR fig. 17](#)).

Grain Supplies Above-Average in Early December

USDA's National Agricultural Statistics Service's (NASS) latest [quarterly Grain Stocks report \(released last month\)](#) provides a snapshot of national and State-level grain stocks as of December 1, 2024.¹ The report details how much grain was available directly after the fall harvest and where that grain is located. According to the NASS report, on- and off-farm grain stocks across the Nation totaled 17.1 billion bushels (bbu) as of December 1, 2024—up 1 percent from the same date in 2023 and 5 percent higher than the 3-year average.²

The increase mainly owed to higher corn and wheat stocks: corn stocks were 536 million bushels (mbu) above average (+5 percent); wheat stocks were 200 mbu above average (+15 percent); and soybean stocks were 47 mbu above average (+2 percent). The combined above-average volume of 782 mbu (for the three commodities) [equates to](#) about 195,600 loaded rail cars or 13,400 loaded barges.

On-farm grain stocks were 9.8 bbu, down less than 1 percent from a year ago, but up 6 percent from average. On-farm stocks in December were the third highest in the past decade, representing sizeable stores of potential future transportation demand.

Because the national statistics mask important regional differences, the following subsections examine stocks at the State level and discuss their effects on transportation.

High Stocks in River States. Multiple States adjacent to the Mississippi River System (MRS) had above-average stocks on December 1, 2024: most notably, Iowa, +123 million bushels (mbu) (+5 percent); Illinois, +72 mbu (+3 percent); Minnesota, +56 mbu (+3 percent); and Missouri, +56 mbu (+10 percent). Across these four highest stock River States, stocks were 306 mbu above average—equivalent to about 5,250 barges (350 15-barge tows) or 76,600 rail cars

(or about 700 110-car unit trains). On-farm stocks were particularly high in Minnesota and Missouri, at 9 percent and 14 percent above average, respectively.

As grain leaves storage and enters marketing channels, it raises the demand for transportation. The four highest stock River States use all modes of domestic transportation, including truck to nearby domestic markets (e.g., ethanol or soybean crush plants); rail to domestic feed markets; and barge and rail to distant export markets. All domestic modes could see more demand from the higher stock levels.

Historical [U.S. Department of Transportation Freight Analysis Framework \(FAF\) flow data](#) offer insight on which lanes and modes may receive more traffic from those higher stocks. According to FAF, most truck movements of cereal grains (primarily, corn and wheat) occur within each State.³

Major interstate corridors that originate grain in one of the four highest stock River States include the following: Illinois to Louisiana by barge (an estimated 23.7 million tons in 2023); Minnesota to Washington by rail (8.7 million tons); Missouri to California by rail (2.7 million tons); Illinois to Mississippi by rail (2.6 million

1 Grain stocks include corn, soybeans, wheat, barley, oats, and grain sorghum.

2 Unless otherwise specified, "average" in this article refers to the prior 3-year average.

3 "Cereal grains" refers to Standard Classification of Transported Goods (SCTG) code "02," which includes wheat, corn, rye, barley, oats, grain sorghum, and other cereal grains. (Soybeans are in SCTG 03, with other agricultural products.) Truck flows of cereal grains were 128 million tons within Iowa, 116 million tons within Illinois, 76 million tons within Minnesota, and 23 million tons within Missouri.

tons); Minnesota to Louisiana by barge (3.2 million tons); and Missouri to Louisiana by barge (1.8 million tons).

High Stocks in Western States. West of the MRS, December grain stocks were mostly above average, including in North Dakota, +215 mbu (+32 percent); South Dakota, +143 mbu (+17 percent); Nebraska, +127 mbu (+8 percent); and Kansas, +84 mbu (+9 percent)—all States that rely on truck and rail transportation. Across these four highest stock Western States, stocks were 570 mbu above average—equivalent to 142,450 rail cars or about 1,300 unit trains.

On-farm stocks in North and South Dakota accounted for 60 percent of the States' total grain stocks and were 286 mbu above average, signaling a large amount of pent-up transportation demand as of early December.

Like the River and other regions, the Western region's truck grain shipments mostly occur within a State. Within-State truck shipments could increase from higher stocks; so, too, could cross-State rail shipments. Major interstate rail corridors originating from the four highest stock Western States include the following: North Dakota to Washington (an estimated 3.9 million tons of cereal grains in 2023); Kansas to Texas (3.7 million tons); South Dakota to Illinois (2.9 million tons); Kansas to Mexico (2.8 million tons); and Nebraska to California (2.8 million tons).

Low Stocks in Southeast and One of Its Major Suppliers—Ohio. Following a poor harvest last year (due to drought), North Carolina's December 1 grain stocks were notably low, down 24 percent from average (−25.5) mbu in total across all 6 commodities; −23.7 mbu for corn; and −1.9 mbu for soybeans). North Carolina's December 1 corn stocks were the lowest since 2015. While Georgia's on-farm stocks were not disclosed in NASS's Stocks report, the State's off-farm stocks were 20 percent (−4.7 mbu) below average—mostly because of lower corn stocks.

Because Southeastern States, like North Carolina and Georgia, generally have small crop sizes, they also have low local grain stores, relative to their needs for livestock and poultry. In 2023, North Carolina was the Nation's largest producer of broilers and turkeys, followed by Georgia. North Carolina was also the third-largest hog-producing State in 2023. Because of the Southeast's perennial grain deficit, the region depends on grain “imports” by rail from the Eastern Corn Belt.

Via CSX Transportation and Norfolk Southern Railway, the Southeast imports the majority of its railed grain from a handful of Eastern Corn Belt States. Sourcing from other areas—especially from more distant Midwestern origins—may be more costly.⁴ For perspective, in 2023, 8.9 million tons (or 87 percent) of

Georgia's rail imports of cereal grains came from a single State (Indiana). North Carolina also has highly concentrated purchases, with over 70 percent of its railed cereal grain imports arriving from two States (Michigan and Ohio). In 2023, North Carolina railed 3.2 million tons (or 38 percent) of its imported cereal grains from Michigan and 2.8 million tons (33 percent) from Ohio. That same year, North Carolina was the top cereal grain destination for both Midwest exporters.

More recently, on December 1, 2024, Ohio's grain stocks were 8 percent below average (−71.6 mbu in total; −52.3 mbu for corn; and −24.3 mbu for soybeans). Given these low stocks, North Carolina may need to source more corn this year from Michigan, Indiana, and Illinois and more soybeans from Michigan.⁵

A Look at Post-December 1 Export and Transportation Data

Exports. According to U.S. Census trade data, total December grain exports were 20 percent above average. Corn exports (5.45 mmt)—marking their highest level since 1989—were up 25 percent. Soybean exports (7.96 mmt) were up 16 percent, and wheat exports (1.65 mmt) were up 28 percent. Combined corn, soybean, and wheat exports were up 20 percent from the Gulf, up 32 percent from the PNW, and up 19 percent to Mexico.⁶

4 In 2023, the Southeast—made up of Alabama, Arkansas, Delaware, Florida, Georgia, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia—sourced 38 percent of its cereal grain by rail from Indiana, 15 percent from Ohio, 12 percent from Louisiana, 12 percent from Illinois, and 10 percent from Michigan.

5 Corn stocks were above average by 18.9 mbu in Michigan, 13.4 mbu in Indiana, and 80.9 mbu in Illinois. Soybean stocks were 8.4 mbu above average in Michigan, but below average in Indiana (−3.7 mbu) and Illinois (−13.7 mbu).

6 Census data are not yet available for January. However, in USDA's Federal Grain Inspections Service's grain inspections data ([available on AgTransport](#)), January corn inspections for export were 52 percent above the 2022-24 average, while soybeans and wheat were 27 and 14 percent below average, respectively.

Barge. On December 1, the Upper Mississippi River navigation season [closed for the winter](#). Because of this closure, grain is railed from the Upper Midwest to St. Louis, MO, and then loaded on barges. From early December until the end of January, 3.7 million tons of grain—34 percent more than average—moved through Lock and Dam 27 (the lock closest to St. Louis, MO). This lock captures any southbound shipments from the Mid-Mississippi and Illinois River—mainly, loads from Iowa, Illinois, and northern Missouri ([GTR fig. 11](#)).

Beginning December 13, congestion began to cause delays at the Illinois River's southernmost Lock and Dam, LaGrange Lock and Dam. The delays along the river worsened in late December (taking up to 2 days) because of extreme cold and ice. Despite these issues, from the beginning of December to the end of January, 2.5 million tons of grain moved through the LaGrange Lock and Dam—32 percent above average, corresponding with high grain supplies in Illinois.

On the Ohio River, from early December to the end of January, 2.2 million tons of grain moved through the Olmsted Lock and Dam—2 percent below average, corresponding with low grain supplies in Ohio.

Rail. In some cases, higher stocks and higher export demand have translated to more rail shipments. North Dakota and South Dakota had the largest December 1 grain surpluses. According to loaded and billed grain car data from the Surface Transportation Board ([available on AgTransport](#)), over the past 9

weeks (from the week ending December 6, 2024, through January 31, 2025), those two States also saw strong grain carloads: North Dakota loaded 39,525 grain cars (20 percent above average), and South Dakota loaded 20,360 grain cars (28 percent above average).

Although Nebraska and Kansas also had above-average December 1 stocks, their stocks have not yet generated more rail carloads. Over the past 9 weeks, Nebraska's 24,561 grain carloads were 4 percent below average, and Kansas's 12,607 grain carloads were 25 percent below average.

In the Eastern Corn Belt, grain carloads from December through January mostly corresponded with stock levels. For example, Michigan had above average grain stocks on December 1, 2024, and over the past 9 weeks, the State loaded 7,288 grain cars, up 57 percent from average. Similarly, Indiana loaded 15,710 cars, up 9 percent from average.

Conversely, Ohio—the State with the largest average drop in December 1 stocks—loaded 11,264 cars, down 29 percent from average. Despite Illinois' above-average stocks, Illinois carloads over this span were down 10 percent. However, as previously noted, barge loads on the Illinois River have been high.

Michigan and Indiana may have sent more loaded grain cars than usual to destinations that would typically have been served by Ohio supplies. Still, on net, grain rail traffic in the East is down: the drops in loaded cars from Ohio and Illinois exceed the increases from Michigan and Indiana by 4,500 cars.

First Look at MY 2025/26 Grain Supplies, To Publish Next Week

Besides grain stocks levels, NASS's Grain Stocks report also contains the latest annual snapshot of on- and off-farm storage capacity by State. Overall, there is very little change: off-farm storage capacity has essentially remained the same year to year, and on-farm storage capacity increased by less than 0.5 percent from a year ago.

Storage capacity interacts with transportation in at least two ways. First, storage allows for the distribution (and transportation) of grain supplies across the marketing year (MY). Second, whenever storage constraints exist during harvest, shippers have increased pressure to ship “now” rather than later.

To the latter point, USDA's first estimates of upcoming (MY 2025/26) U.S. corn, soybeans, and wheat production (and their MY ending stocks) [will be released](#) during USDA's 101st Agricultural Outlook Forum, scheduled for February 27-28. (For more information, see [GTR, January 30, 2025, fourth highlight](#).)

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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.

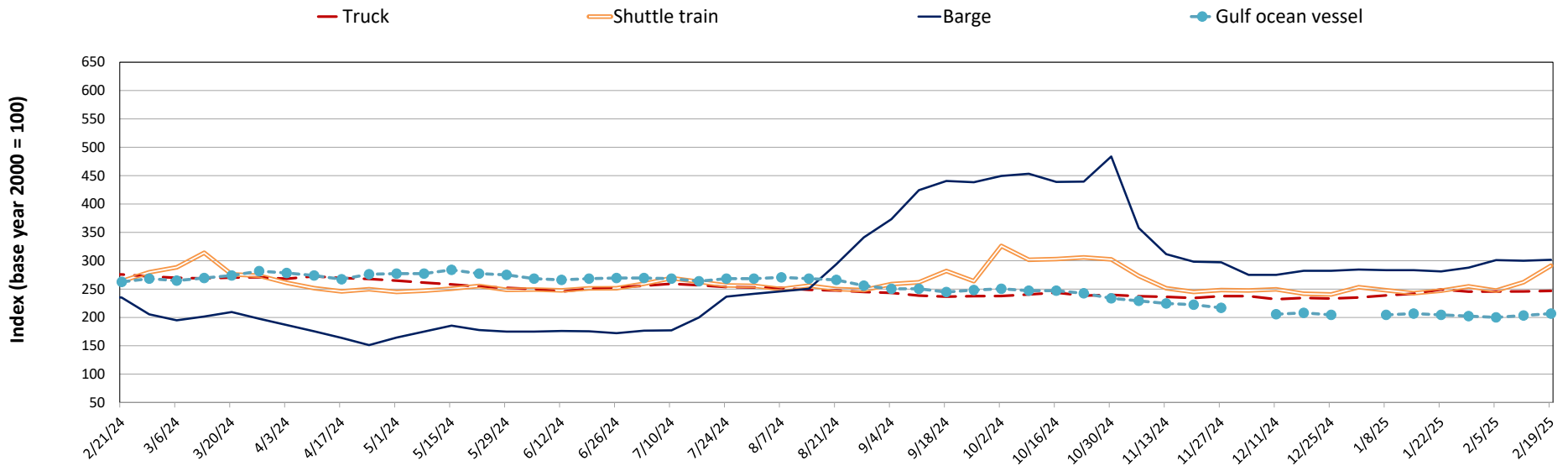
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
02/19/25	247	359	291	302	207	191
02/12/25	246	342	262	300	203	190
02/21/24	276	355	264	235	263	220

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.

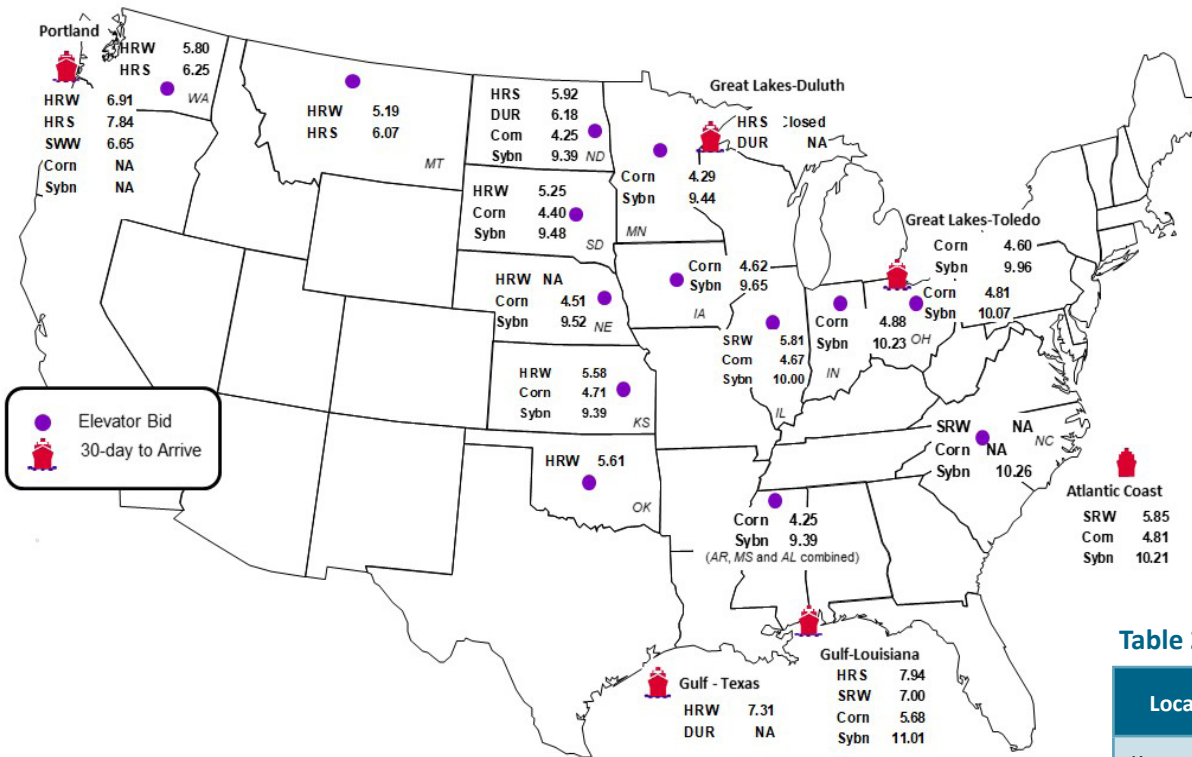
Figure 1. Grain transportation cost indicators as of week ending 2/19/25



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	2/14/2025	2/7/2025
Corn	IL-Gulf	-1.01	-0.99
Corn	NE-Gulf	-1.17	-1.13
Soybean	IA-Gulf	-1.36	-1.38
HRW	KS-Gulf	-1.73	-1.93
HRS	ND-Portland	-1.92	-1.88

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	2/14/2025	Week ago 2/7/2025	Year ago 2/16/2024
Kansas City	Wheat	Mar	6.176	6.046	5.654
Minneapolis	Wheat	Mar	6.334	6.276	6.554
Chicago	Wheat	Mar	5.990	5.830	5.636
Chicago	Corn	Mar	4.990	4.876	4.330
Chicago	Soybean	Mar	10.384	10.472	11.886

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.

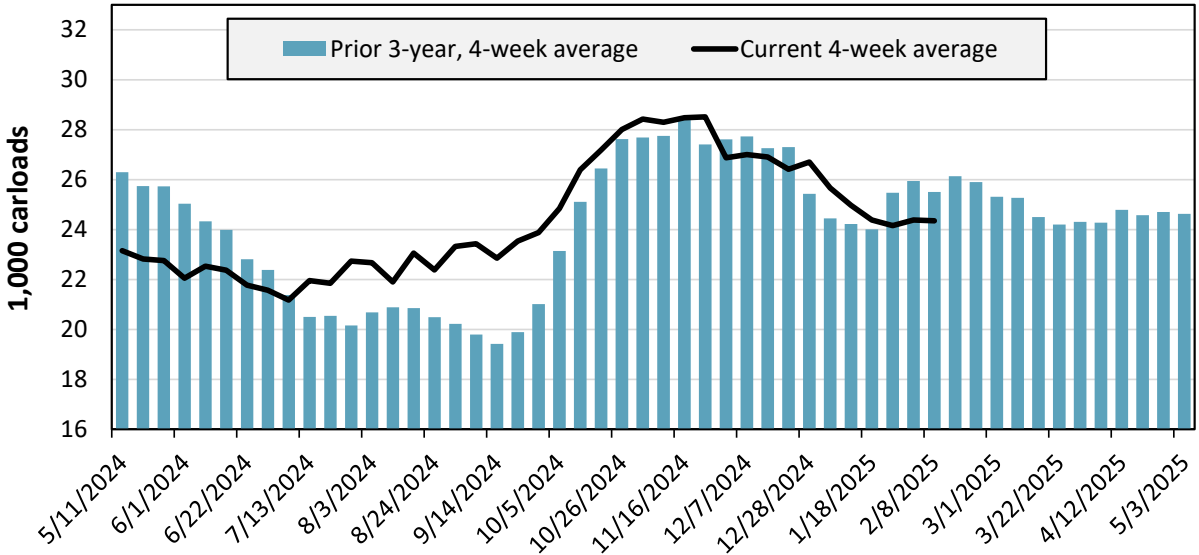
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 2/08/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,983	3,367	10,168	6,246	2,365	1,363	25,492
This week last year	1,563	3,316	10,901	5,771	3,316	1,079	25,946
2025 YTD	10,780	18,262	64,188	32,334	13,961	7,974	147,499
2024 YTD	10,866	17,693	60,333	30,848	17,761	6,917	144,418
2025 YTD as % of 2024 YTD	99	103	106	105	79	115	102
Last 4 weeks as % of 2024	111	104	106	104	76	116	102
Last 4 weeks as % of 3-yr. avg.	100	115	97	93	79	84	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 February 8, grain carloads were unchanged from the previous week, up 2 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: 2/7/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	36.2	28.4	34.1	19.8	7.5	22.9	18.0	23.8
	Average over last 4 weeks	33.2	31.2	43.1	18.9	8.7	26.3	20.9	26.0
	Average of same 4 weeks last year	20.8	33.9	48.7	22.2	7.3	26.9	19.3	25.6
Grain unit train speeds (miles per hour)	This week	21.6	19.4	24.1	22.2	26.0	21.0	23.2	22.5
	Average over last 4 weeks	22.3	20.2	24.7	22.4	25.2	20.6	24.0	22.8
	Average of same 4 weeks last year	23.2	18.1	23.4	22.7	24.9	22.3	27.3	23.1

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

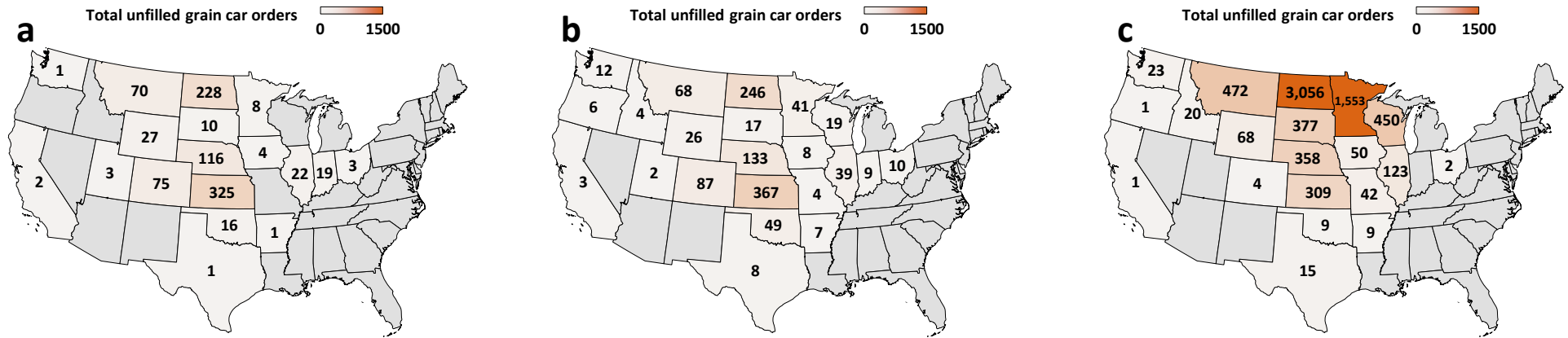
For the week ending: 2/7/2025		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Empty grain cars not moved in over 48 hours (number)	This week	28	5	437	87	8	76	28	668
	Average over last 4 weeks	38	6	435	86	7	77	17	665
	Average of same 4 weeks last year	24	12	709	190	4	39	17	993
Loaded grain cars not moved in over 48 hours (number)	This week	104	189	1,080	86	7	112	18	1,596
	Average over last 4 weeks	91	228	1,189	81	4	103	11	1,707
	Average of same 4 weeks last year	31	280	1,783	151	3	84	16	2,347
Grain unit trains held (number)	This week	0	0	28	3	0	7	3	41
	Average over last 4 weeks	1	0	23	5	0	4	2	35
	Average of same 4 weeks last year	0	4	35	7	0	4	7	57
Unfilled manifest grain car orders (number)	This week	22	0	326	470	0	113	0	931
	Average over last 4 weeks	20	5	439	638	0	62	6	1,169
	Average of same 4 weeks last year	2	0	5,965	352	0	623	26	6,967

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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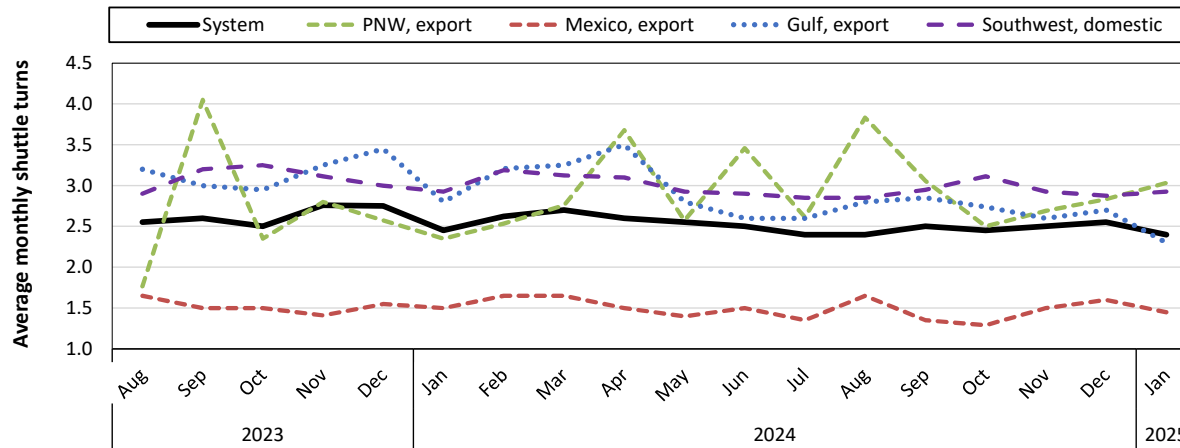
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 2/7/2025 (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

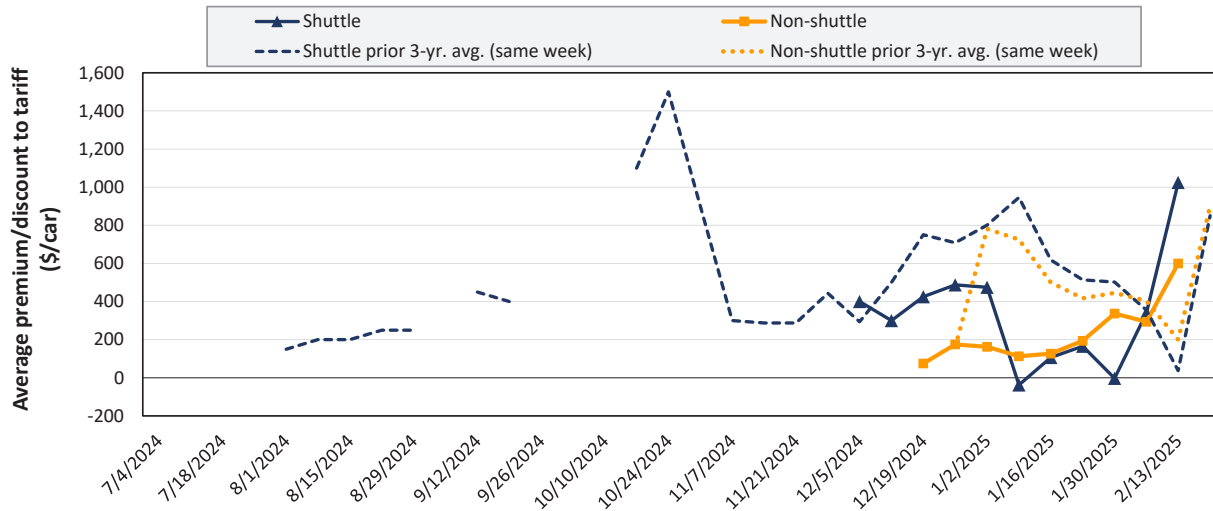


Average monthly systemwide grain shuttle turns for January 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.03 to PNW, 1.45 to Mexico, 2.3 to the Gulf, and 2.93 to the Southwest.

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



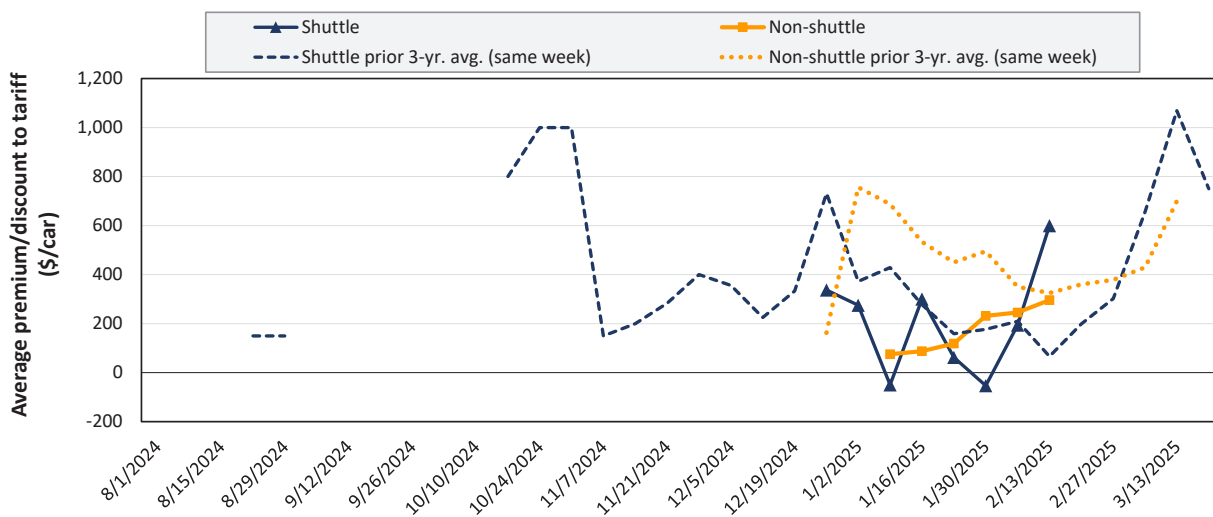
Average non-shuttle bids/offers rose \$306 this week, and are at the peak.

Average shuttle bids/offers rose \$683 this week and are at the peak.

2/13/2025	BNSF	UP
Non-Shuttle	\$600	n/a
Shuttle	\$1,750	\$300

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



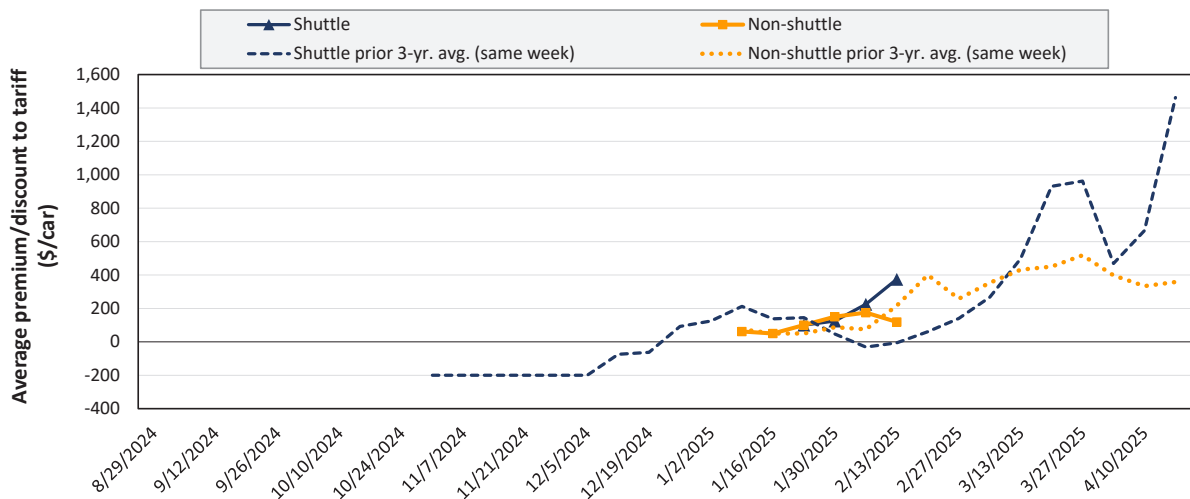
Average non-shuttle bids/offers rose \$50 this week, and are at the peak.

Average shuttle bids/offers rose \$406 this week and are at the peak.

2/13/2025	BNSF	UP
Non-Shuttle	\$467	\$125
Shuttle	\$1,125	\$75

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 fell \$56 this week, and are \$56 below the peak.

Average shuttle bids/offers rose \$150 this week and are at the peak.

	2/13/2025	BNSF	UP
Non-Shuttle		\$200	\$38
Shuttle		\$375	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: 2/13/2025		Delivery period					
		Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25
Non-shuttle	BNSF	600	467	200	200	n/a	n/a
	Change from last week	87	75	-100	-100	n/a	n/a
	Change from same week 2024	n/a	-433	-350	n/a	n/a	n/a
	UP	n/a	125	38	50	n/a	n/a
	Change from last week	n/a	25	-13	0	n/a	n/a
	Change from same week 2024	n/a	-288	-13	0	n/a	n/a
Shuttle	BNSF	1,750	1,125	375	125	n/a	n/a
	Change from last week	1,054	562	150	n/a	n/a	n/a
	Change from same week 2024	n/a	650	275	225	n/a	n/a
	UP	300	75	n/a	n/a	n/a	n/a
	Change from last week	313	250	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-192	n/a	n/a	n/a	n/a
	CPKC	0	75	n/a	150	n/a	n/a
	Change from last week	0	-25	n/a	n/a	n/a	n/a
Change from same week 2024	n/a	-200	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.

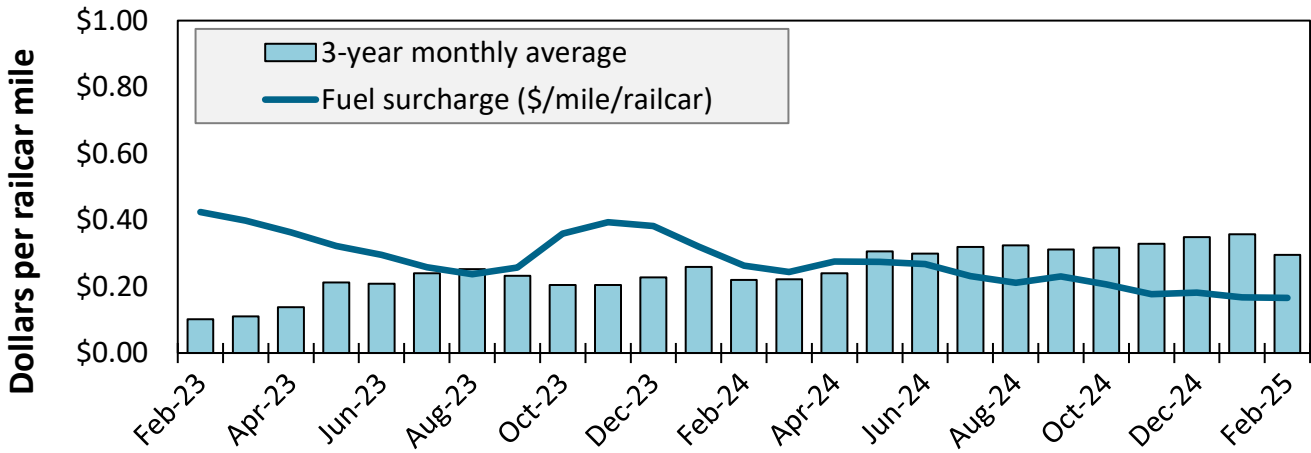
Source: BNSF Railway, Canadian National Railway, CSX Transportation, and Union Pacific Railroad.

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

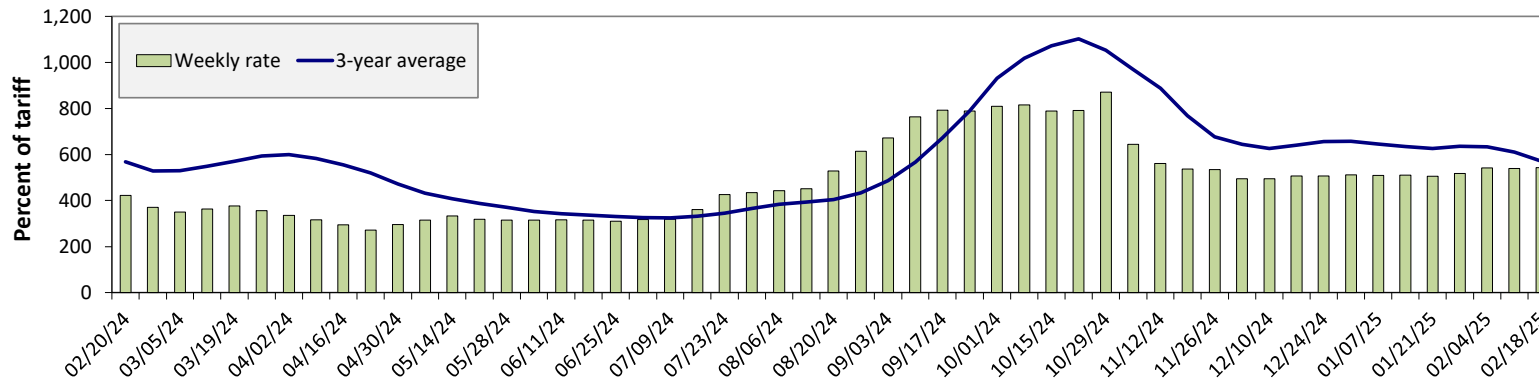
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments 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.

Figure 10. Illinois River barge freight rate



For the week ending February 18: 1 percent higher than the previous week; 29 percent higher than last year; and 5 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	2/18/2025	n/a	n/a	543	469	492	362
	2/11/2025	n/a	n/a	540	473	435	344
\$/ton	2/18/2025	n/a	n/a	25.20	18.71	23.07	11.37
	2/11/2025	n/a	n/a	25.06	18.87	20.40	10.80
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	29	44	19	22
	3-year avg.	n/a	n/a	-5	3	-6	-6
Rate	March	n/a	527	503	410	431	335
	May	474	425	409	338	372	290

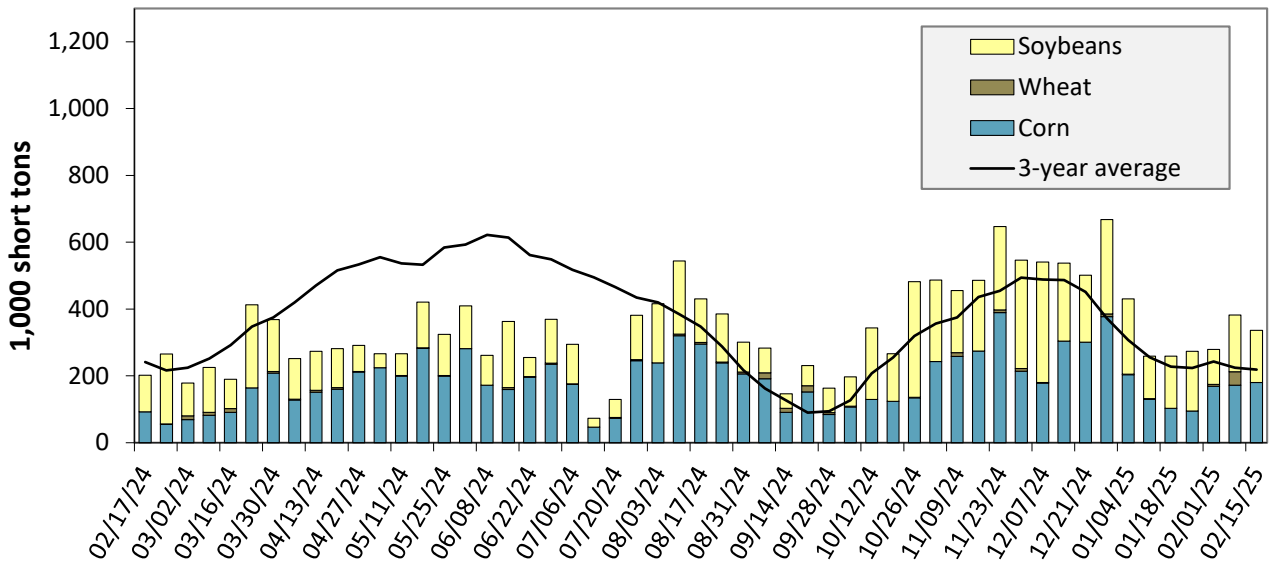
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of \$6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi 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 15:
66 percent higher than last year and
54 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.

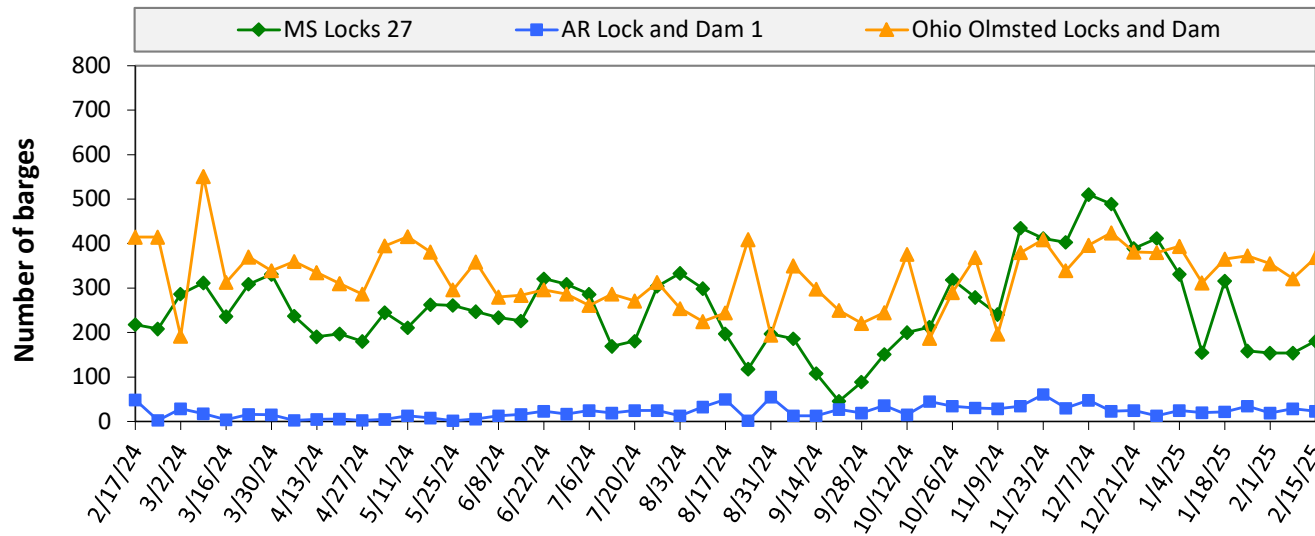
Table 10. Barged grain movements (1,000 tons)

For the week ending 02/15/2025	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))	117	0	101	0	218
Mississippi River (Granite City, IL (L27))	180	0	156	0	336
Illinois River (La Grange)	115	0	87	0	202
Ohio River (Olmsted)	205	2	82	0	288
Arkansas River (L1)	0	13	34	0	47
Weekly total - 2025	384	15	272	0	671
Weekly total - 2024	261	32	232	11	535
2025 YTD	2,113	105	1,908	20	4,146
2024 YTD	1,251	130	2,076	25	3,481
2025 as % of 2024 YTD	169	81	92	81	119
Last 4 weeks as % of 2024	188	96	89	75	124
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.

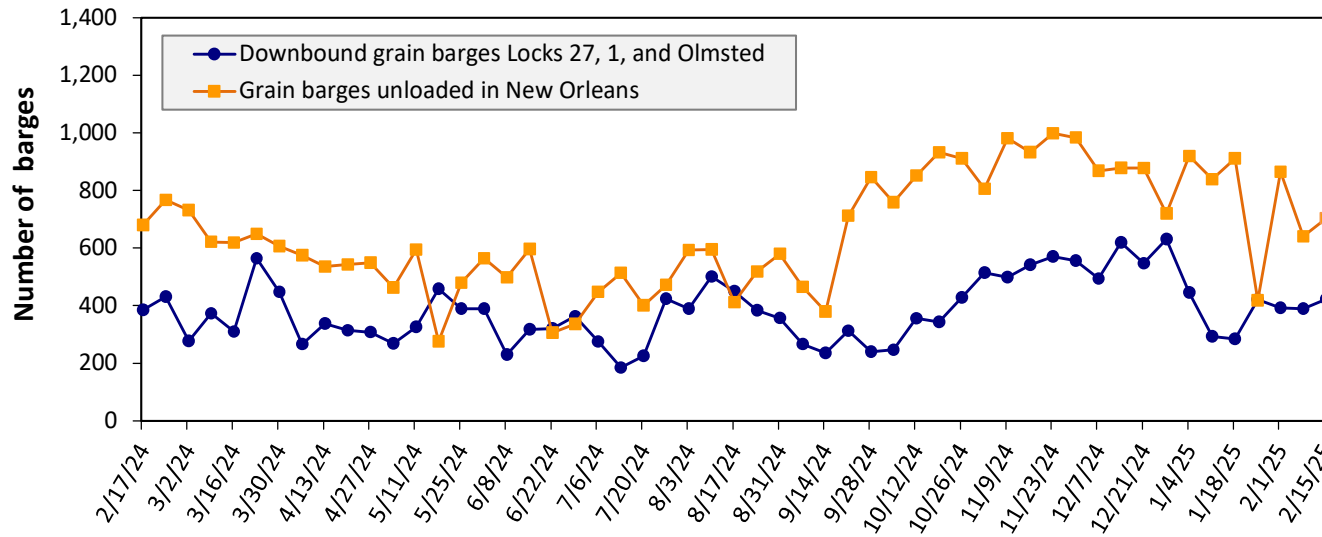
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending February 15: 573 barges transited the locks, 69 barges more than the previous week, and 1 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 15: 423 barges moved down river, 34 more than the previous week; 703 grain barges unloaded in the New Orleans Region, 10 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.

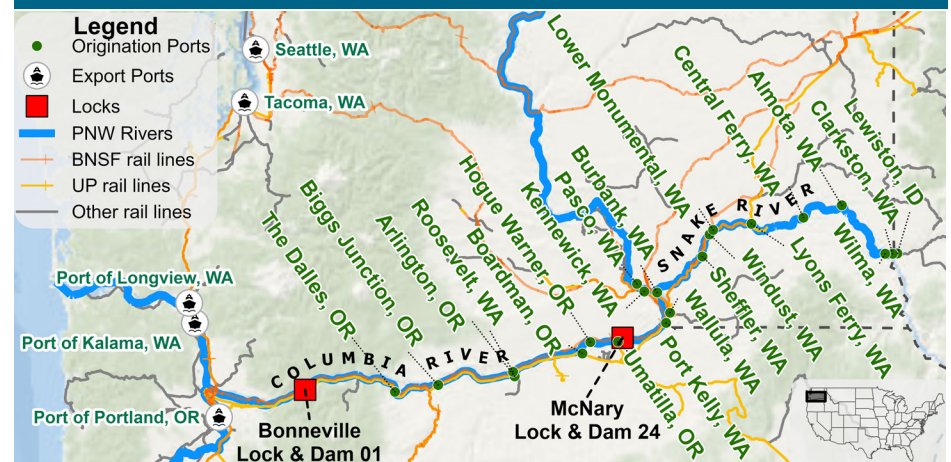
Table 12. Monthly barged grain movements Columbia-Snake (1,000 tons)

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.

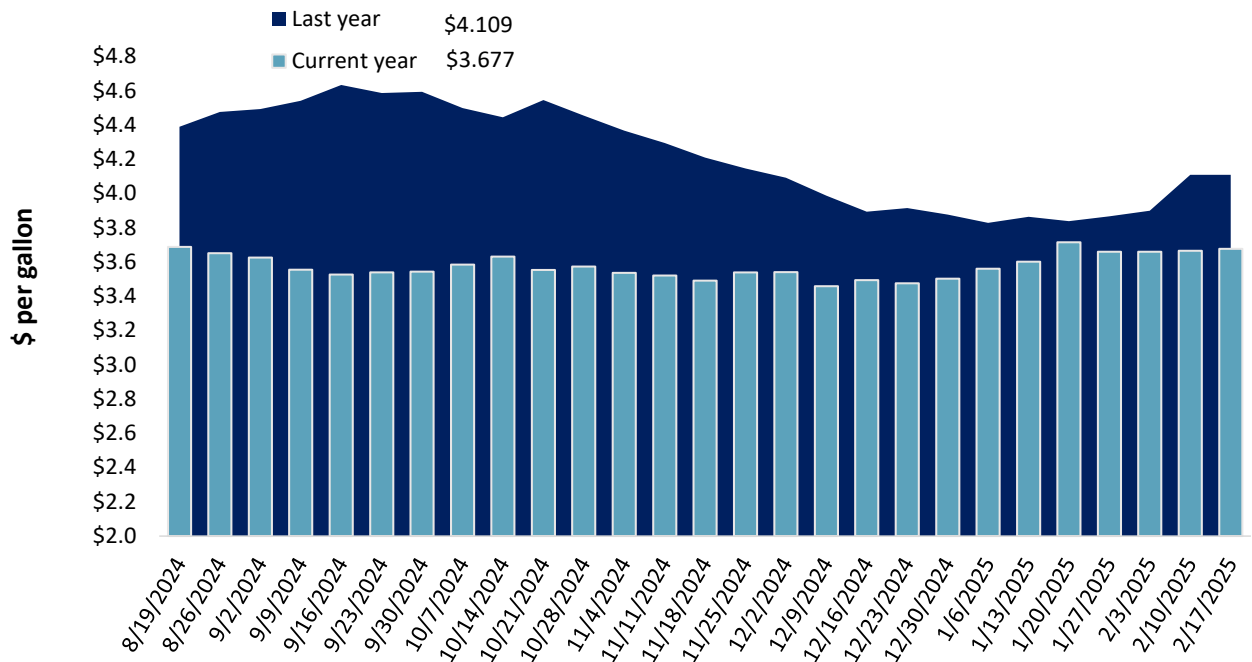
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 2/17/2025 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.791	0.030	-0.449
	New England	4.021	0.051	-0.299
	Central Atlantic	3.980	0.006	-0.375
	Lower Atlantic	3.696	0.035	-0.493
II	Midwest	3.602	0.020	-0.408
III	Gulf Coast	3.382	-0.011	-0.462
IV	Rocky Mountain	3.510	-0.018	-0.447
V	West Coast	4.316	0.009	-0.405
	West Coast less California	3.863	-0.020	-0.391
	California	4.839	0.043	-0.419
Total	United States	3.677	0.012	-0.432

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 17, the U.S. average diesel fuel price increased 1.2 cents from the previous week to \$3.677 per gallon, 43.2 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 2/6/2025	1,195	743	1,535	1,364	131	4,968	22,777	7,960	35,704
	This week year ago	950	2,203	1,790	1,015	147	6,105	18,258	8,404	32,766
	Last 4 wks. as % of same period 2023/24	113	34	89	147	89	82	125	122	116
Current shipped (cumulative) exports sales	2024/25 YTD	3,379	2,110	4,620	3,854	228	14,191	23,639	35,296	73,127
	2023/24 YTD	2,172	2,312	4,071	2,617	310	11,481	17,957	30,200	59,638
	YTD 2024/25 as % of 2023/24	156	91	114	147	73	124	132	117	123
	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 2/06/2025	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	16,684	16,244	3	17,746
Japan	6,864	5,340	29	9,366
China	32	1,769	-98	8,233
Colombia	4,540	3,464	31	4,383
Korea	2,697	1,082	149	1,565
Top 5 importers	30,818	27,898	10	41,293
Total U.S. corn export sales	46,416	36,215	28	51,170
% of YTD current month's export projection	75%	62%	-	-
Change from prior week	1,649	1,307	-	-
Top 5 importers' share of U.S. corn export sales	66%	77%	-	81%
USDA forecast February 2025	62,233	58,220	7	-
Corn use for ethanol USDA forecast, February 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 2/6/2025	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	20,647	21,577	-4	28,636
Mexico	3,649	3,831	-5	4,917
Japan	1,446	1,613	-10	2,231
Egypt	2,132	482	342	2,228
Indonesia	1,087	1,035	5	1,910
Top 5 importers	28,960	28,539	1	39,922
Total U.S. soybean export sales	43,256	38,604	12	51,302
% of YTD current month's export projection	87%	84%	-	-
Change from prior week	186	284	-	-
Top 5 importers' share of U.S. soybean export sales	67%	74%	-	78%
USDA forecast, February 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 2/6/2025	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	3,555	2,804	27	3,298
Philippines	2,420	2,557	-5	2,494
Japan	1,814	1,682	8	2,125
China	139	2,462	-94	1,374
Korea	2,123	1,212	75	1,274
Taiwan	849	999	-15	921
Nigeria	467	243	92	920
Thailand	828	449	85	552
Colombia	386	237	63	522
Vietnam	419	416	1	313
Top 10 importers	12,999	13,059	-0	13,792
Total U.S. wheat export sales	19,159	17,586	9	18,323
% of YTD current month's export projection	83%	91%	-	-
Change from prior week	570	333	-	-
Top 10 importers' share of U.S. wheat export sales	68%	74%	-	75%
USDA forecast, February 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)

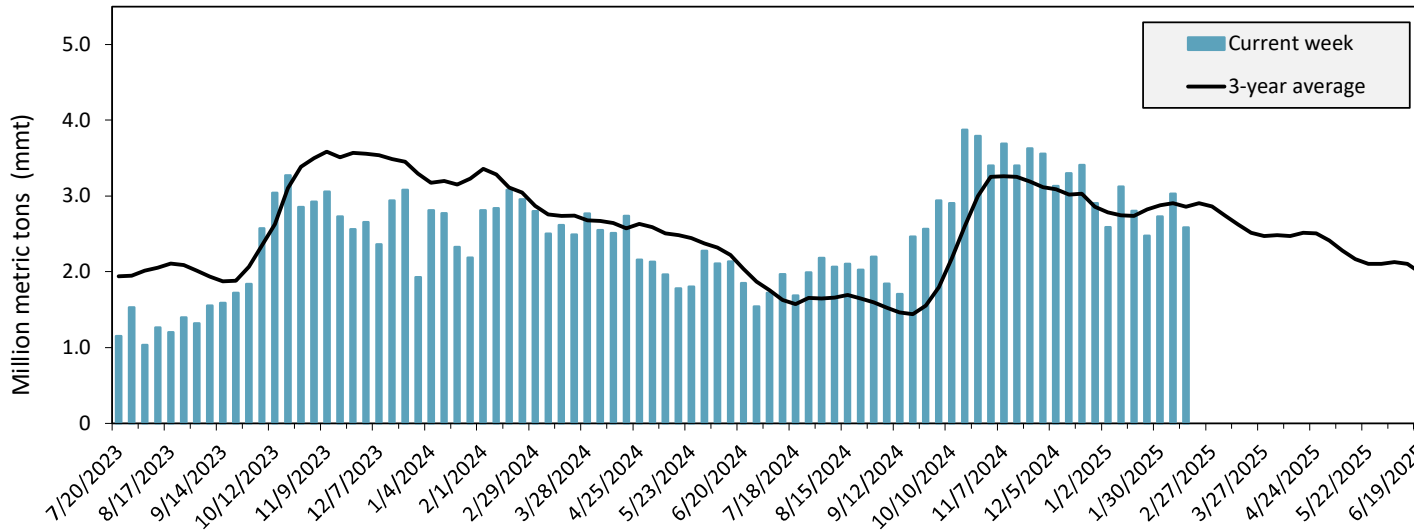
Port regions	Commodity	For the week ending 02/13/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	599	391	153	2,878	1,405	205	215	275	13,987
	Soybeans	67	134	50	1,055	1,707	62	47	33	10,445
	Wheat	148	266	55	1,229	1,196	103	140	103	11,453
	All grain	814	792	103	5,231	4,701	111	115	102	37,186
Mississippi Gulf	Corn	781	728	107	4,356	2,581	169	181	141	27,407
	Soybeans	326	777	42	4,045	4,993	81	71	69	29,741
	Wheat	54	92	58	366	471	78	68	86	4,523
	All grain	1,161	1,597	73	8,767	8,101	108	105	96	61,789
Texas Gulf	Corn	3	6	60	30	56	53	54	41	570
	Soybeans	86	0	n/a	86	0	n/a	n/a	258741	741
	Wheat	0	133	0	226	99	227	179	103	1,940
	All grain	93	140	66	359	808	44	52	52	6,965
Interior	Corn	228	230	99	1,283	1,470	87	86	104	13,463
	Soybeans	135	128	105	821	1,150	71	70	78	8,058
	Wheat	48	68	71	320	300	107	98	84	2,947
	All grain	411	429	96	2,443	2,954	83	80	90	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	22	12	191	n/a	120	653
	All grain	0	11	0	22	12	191	n/a	113	1,060
Atlantic	Corn	0	0	n/a	42	17	247	170	122	410
	Soybeans	106	58	181	333	375	89	105	89	1,272
	Wheat	0	0	n/a	0	5	0	n/a	n/a	73
	All grain	106	58	181	375	397	94	105	87	1,754
All Regions	Corn	1,611	1,355	119	8,590	5,529	155	161	155	56,109
	Soybeans	720	1,097	66	6,444	8,279	78	70	63	50,864
	Wheat	250	570	44	2,163	2,084	104	119	97	21,589
	All grain	2,585	3,028	85	17,301	17,026	102	101	95	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.

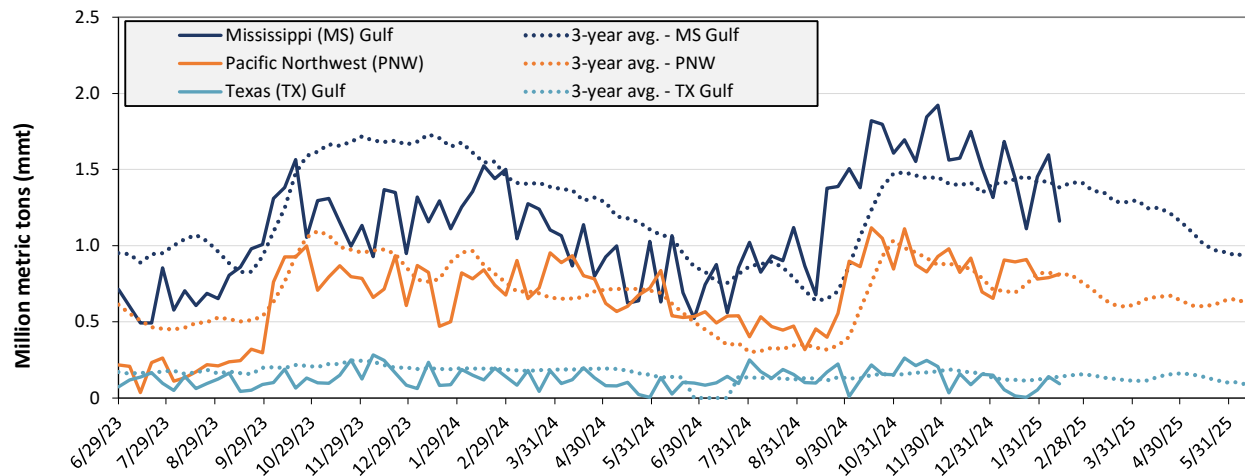
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Feb. 13: 2.6 mmt of grain inspected, down 15 percent from the previous week, down 17 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 02/13/25 inspections (mmt):

MS Gulf: 1.16
PNW: 0.81
TX Gulf: 0.09

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 27	down 34	down 28	up 3
Last year (same 7 days)	down 23	down 30	down 24	down 5
3-year average (4-week moving average)	down 16	down 34	down 18	unchanged

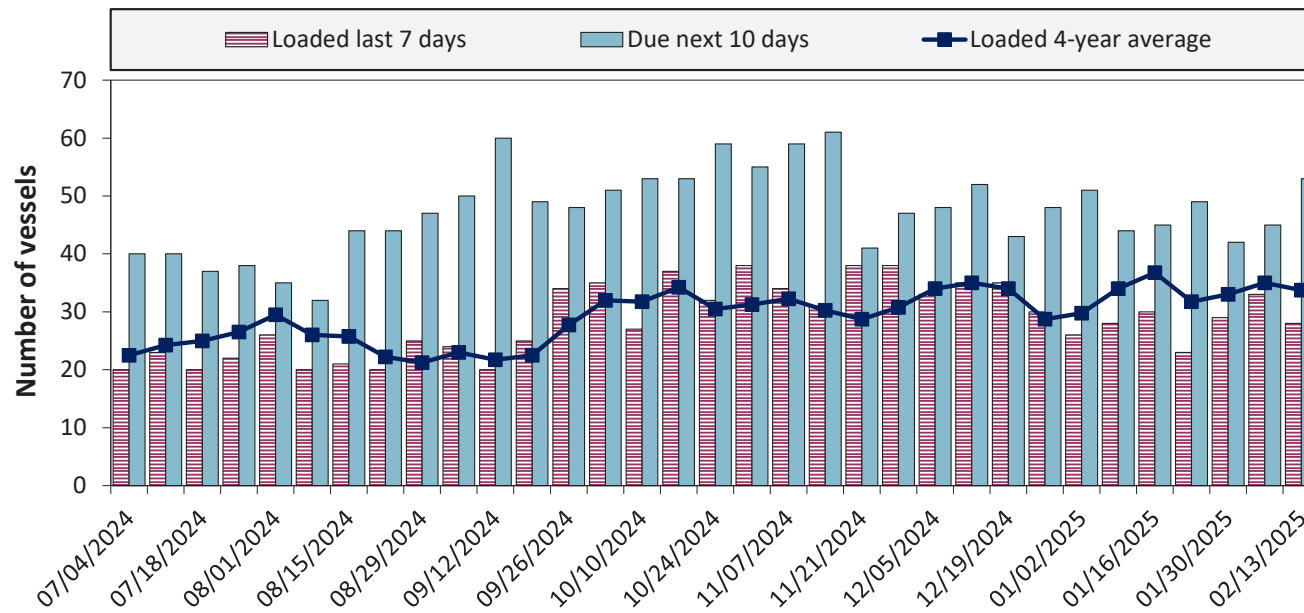
Source: USDA, Federal Grain Inspection Service.

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
2/13/2025	30	28	53	14
2/6/2025	32	33	45	20
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.

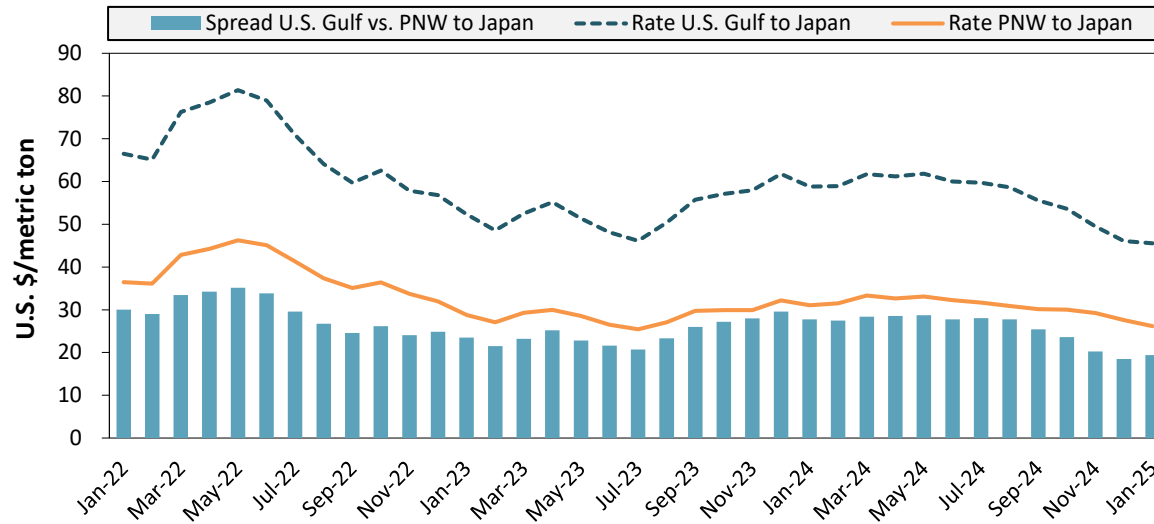
Figure 19. U.S. Gulf vessel loading activity



Week ending 02/13/25, number of vessels	Loaded	Due
Change from last year	-3%	33%
Change from 4-year average	-17%	17%

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.

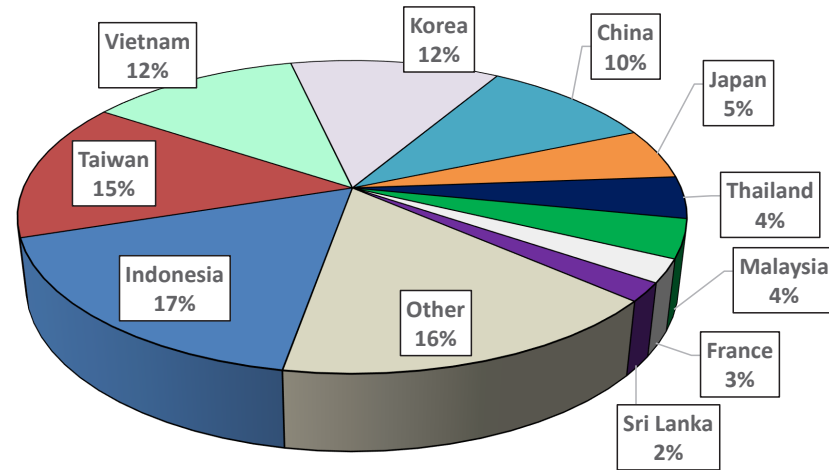
Table 20. Ocean freight rates for selected shipments, week ending 2/15/2025

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
PNW	China	Heavy grain	Feb 12, 2025	Mar 1/30, 2025	50,000	27.50
U.S. Gulf	Colombia	Soybean Meal	May 7, 2024	May 20/30, 2024	3,000	28.30
Brazil	China	Heavy grain	Feb 12, 2025	Mar 2/9, 2025	63,000	32.00
Brazil	China	Heavy grain	Feb 12, 2025	Mar 2/8, 2025	63,000	31.25
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	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.

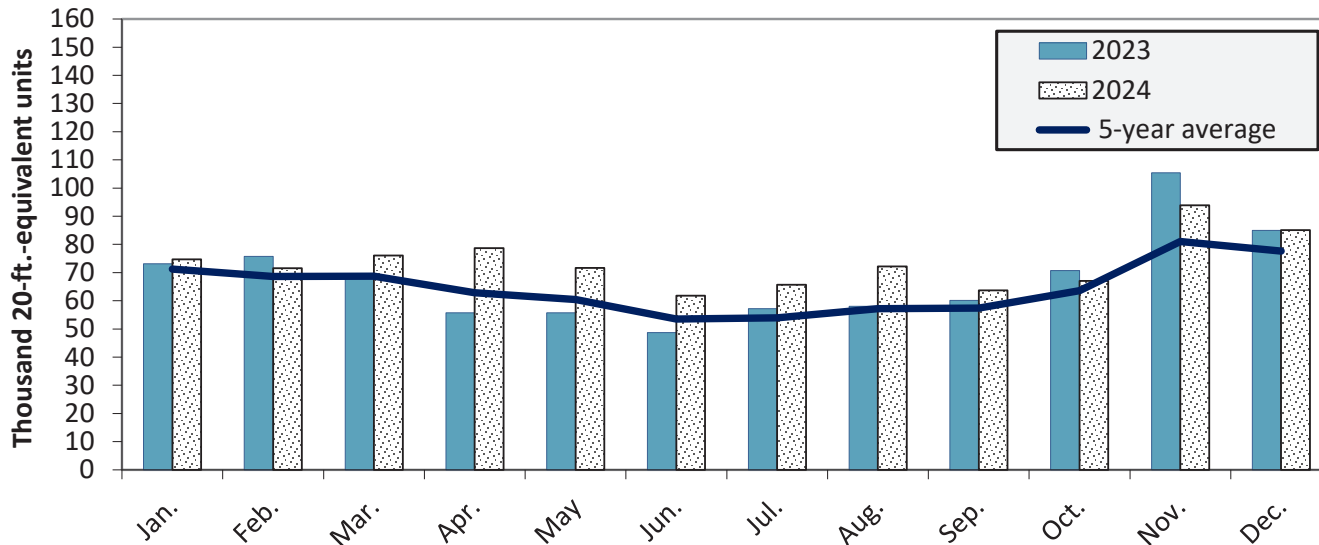
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Dec 2024



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 Dec. 2024 were up 0.1 percent from last year and up 9.6 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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