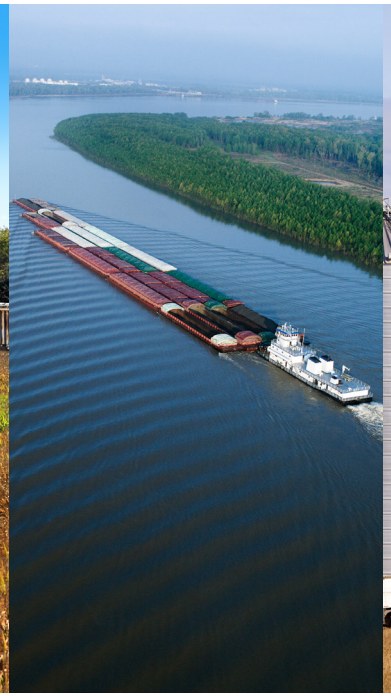
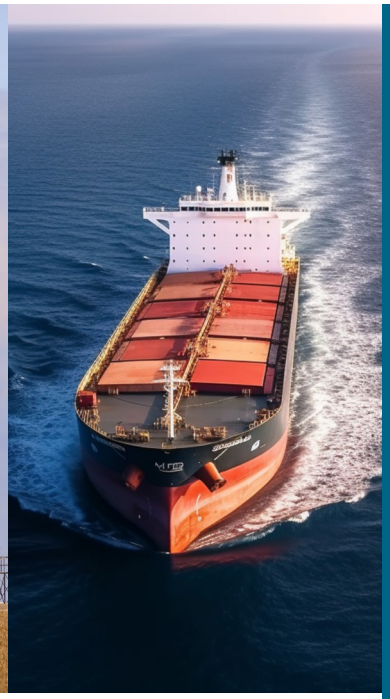
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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PNW Corn Shipments Reach All-Time Weekly High. According to USDA's Federal Grain Inspection Service, in the week ending March 6, corn inspected for export from Pacific Northwest (PNW) terminals reached an all-time weekly high of 0.74 million metric tons (mmt) (*Grain Transportation Report (GTR)* table 18). In total, 12 vessels loaded with corn—8 from Columbia River ports and 4 out of the Puget Sound—set sail for Japan, South Korea, Vietnam, and Taiwan.

However, over the same week, wheat and soybean shipments from PNW export terminals declined sharply, as just 50,000 metric tons of wheat and 68,000 metric tons of soybeans were inspected for export. Compared to the prior 3-year average, wheat shipments were down 76 percent, and soybean shipments were down 66 percent.

Nationwide, 1.8 mmt of corn were inspected for export in the week ending March 6. This volume is a high for marketing year (MY) 2024/25, as well as the highest weekly total since MY 2020/21.

NGFA Declares Mid-Mississippi River Open for Navigation. On March 10, the National Grain and Feed Association (NGFA) declared the Mid-Mississippi River open for navigation after the *MV Phillip M. Pfeiffer* (an empty dry cargo covered barge suitable for loading) reached Dubuque, IA, on March 8. Last year, the Mid-Mississippi River opened 2 days later.

The Upper Mississippi River (UMR) is expected to open soon, also. In 2024, the navigation season on the UMR began on March 17 (*GTR, March 21, 2024, third highlight*).

Grain Movements Through Great Lakes St. Lawrence Seaway System Rose in 2024. In 2024, 11.8 million tons of grain moved through the Great Lakes St. Lawrence Seaway System, up 12.5 percent from 2023. Although grain movements were up, total cargo movements were down 1.6 percent, despite a 0.5-percent rise in total vessel transits. Agricultural products made up about 30 percent of all Seaway trade in 2023. The U.S. and Canadian grain shipped through the Seaway—including wheat, corn, soybeans, barley, and oats—is primarily exported.

In 2022, 135.7 million metric tons of cargo valued at $26.1 billion traveled through the Seaway, creating 147,350 jobs. The Seaway complements rail and highway networks to offer a cost effective and reliable means of moving agricultural products. The Seaway is the world's longest deep-draft inland waterway system at 3,700 kilometers long, extending from the Atlantic Ocean to the Great Lakes.

Iowa Extends Weight-Limit Suspension. Iowa has reextended, through April 7, 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). Applicable on all Iowa highways (except interstates), the decree permits agricultural loads up to 90,000 pounds gross weight. Drivers must continue to obey maximum weight limits and posted restrictions on roads and bridges.

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 27, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 33.55 million metric tons (mmt), down 2 percent from last week and up 16 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 0.91 mmt, up 15 percent from last week. Net **soybean export sales** were 0.35 mmt, down 14 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.34 mmt, up 26 percent from last week.

Rail

U.S. Class I railroads originated 24,306 **grain carloads** during the week ending March 1. This was a 23-percent increase from the previous week, 2 percent more than last year, and 2 percent more than the 3-year average.

Average March **shuttle secondary railcar bids/offers** (per car) were $782 above tariff for the week ending March 6. This was $304 more than last week and $795 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $425 above tariff. This was $113 more than last week and $375 lower than this week last year.

Barge

For the week ending March 8, **barged grain movements** totaled 383,500 tons. This was 9 percent less than the previous week and 35 percent less than the same period last year.

For the week ending March 8, 248 grain barges **moved down river**—53 fewer than last week. There were 727 grain barges **unloaded** in the New Orleans region, 14 percent more than last week.

Ocean

For the week ending March 6, 27 **oceangoing grain vessels** were loaded in the Gulf—unchanged from the same period last year. Within the next 10 days (starting March 7), 39 vessels were expected to be loaded—29 percent fewer than the same period last year.

As of March 6, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.25, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $27.00 per mt, down 2 percent from the previous week.

Fuel

For the week ending March 10, the U.S. average **diesel price** decreased 5.3 cents from the previous week, to $3.582 per gallon—42.2 cents below the same week last year.

Transportation and Landed Costs to Mexico Varied From Third to Fourth Quarter 2024

Low transportation and landed costs for U.S.-Mexico routes are vital to the competitiveness of U.S. grain in Mexico (a top importer of U.S. grain) and globally. U.S. grain is transported to Mexico either by cross-border land movements or by sea movements to Mexican ports for inland distribution. This article examines the costs of transporting U.S. grain to Mexico over land to various border locations (land routes) and by sea to Veracruz (water routes), tracking changes over time (table 1).

Table 1. Quarterly costs of transporting U.S. grain to Veracruz, Mexico, and U.S.-Mexico border locations

Origin	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Corn									
	Illinois origin					Iowa origin				
Truck	16.75	17.67	17.87	6.7	1.1	6.34	6.84	5.97	-5.8	-12.7
Rail	-	-	-	-	-	61.80	59.37	59.89	-3.1	0.9
Barge	27.06	27.21	32.43	19.8	19.2	-	-	-	-	-
Ocean	19.74	16.52	14.84	-24.8	-10.2	-	-	-	-	-
Total transportation cost	63.55	61.40	65.14	2.5	6.1	68.14	66.21	65.86	-3.3	-0.5
Farm value	187.79	153.14	159.05	-15.3	3.9	191.72	163.11	162.72	-15.1	-0.2
Landed cost	251.34	214.54	224.19	-10.8	4.5	259.86	229.32	228.58	-12.0	-0.3
Transport % of landed cost	25	29	29	3.77	0.44	26	29	29	2.59	-0.1
Origin	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Soybeans									
	Illinois origin					Missouri origin				
Truck	16.75	17.67	17.87	6.7	1.1	6.34	6.84	5.97	-5.8	-12.7
Rail	-	-	-	-	-	55.76	53.91	53.45	-4.1	-0.9
Barge	27.06	27.21	32.43	19.8	19.2	-	-	-	-	-
Ocean	19.74	16.52	14.84	-24.8	-10.2	-	-	-	-	-
Total transportation cost	63.55	61.40	65.14	2.5	6.1	62.10	60.75	59.42	-4.3	-2.2
Farm value	480.12	396.83	369.89	-23.0	-6.8	476.44	388.26	362.05	-24.0	-6.8
Landed cost	543.67	458.23	435.03	-20.0	-5.1	538.54	449.01	421.47	-21.7	-6.1
Transport % of landed cost	12	13	15	3.28	1.57	12	14	14	2.57	0.6

table 1 continues on page 5

table 1 continues from page 4

Origin	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	Wheat									
	Kansas origin					Kansas origin				
Truck	6.34	6.84	5.97	-5.8	-12.7	6.34	6.84	5.97	-5.8	-12.7
Rail	47.92	44.76	44.46	-7.2	-0.7	50.42	45.40	45.15	-10.5	-0.6
Ocean	19.74	16.52	14.84	-24.8	-10.2	-	-	-	-	-
Total transportation cost	74.00	68.12	65.27	-11.8	-4.2	56.76	52.24	51.12	-9.9	-2.1
Farm value	231.36	195.23	196.33	-15.1	0.6	231.36	195.23	196.33	-15.1	0.6
Landed cost	305.36	263.35	261.60	-14.3	-0.7	288.12	247.47	247.45	-14.1	0.0
Transport % of landed cost	24	26	25	1	-1	20	21	21	1	-0.5

Note: In 2022, because of tax changes in Mexico, all three Class I railroads that ship from the United States to Mexico (BNSF, Union Pacific, and Kansas City Southern) report rates only to the border for interchange: these rates are called "Rule 11 rates." The estimated total includes the estimated tariff through-rate for shuttle train service to U.S.-Mexico border locations and the reported fuel surcharge. The estimated rate excludes any additional costs for shuttle car service. Rates may be revised from what were previously published.
Source for ocean freight rates: O'Neil Commodity Consulting. Source for farm values: USDA, National Agricultural Statistics Service. Landed cost is total transportation cost plus farm value. "-" indicates data not required or applicable. Total may not add exactly because of rounding.
Source: Compiled by USDA, Agricultural Marketing Service.

Quarter-to-Quarter Transportation Costs. From third quarter 2024 to fourth quarter 2024 (quarter to quarter), total transportation costs fell for all grains shipped by land routes, and wheat by water routes.[1] Total transportation costs rose for seaborne corn and soybeans because of higher truck and barge rates. Falling land-route shipping costs for corn, soybeans, and wheat reflected lower rates for truck and/or rail.

Truck rates rose with strong trucking demand. Barge rates rose in response to higher export sales, as well as drought-induced navigation restrictions on the Mississippi River System throughout most of the quarter (***Grain Transportation Report (GTR), January 23, 2025***).

Year-to-Year Transportation Costs. Trends in transportation costs from fourth quarter 2023 to fourth quarter 2024 (year to year) resembled the quarter-to-quarter trends. Year to year, the total cost of shipping U.S. corn and soybeans to Mexico by water routes rose because of higher truck and barge rates. However, the costs of shipping all grains to Mexico by land routes fell because of lower truck and rail tariff rates. The costs of shipping wheat by water routes fell because of lower truck, ocean, and rail rates.

Quarter-to-Quarter Landed Costs. Quarter to quarter, landed costs fell for most grains shipped by the water and land routes. The one exception was corn shipped by water routes, for which rises in both transportation costs and farm values pushed up landed costs. For seaborne wheat, lower landed costs reflected declining transportation costs that outweighed the rising farm values. For land-route corn and soybeans, lower landed costs reflected declines in both farm values and transportation costs (table 1 and ***figs. 1*** and ***2***). For land-route wheat, landed costs stayed the same, as rising farm values canceled out declining transportation costs.

The share of landed costs comprising transportation in fourth quarter 2024 ranged from 15 percent to 29 percent for the water routes and from 14 percent to 29 percent for the land routes.

1 Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

Year-to-Year Landed Costs. Year to year, landed costs fell for all grains shipped by water and land routes. Landed costs decreased for waterborne corn and soybeans, because of falling farm values that outweighed rising transportation costs. For seaborne wheat and all grains shipped by the land routes, landed costs fell because of both lower transportation costs and lower farm values.

U.S. Exports to Mexico. According to USDA's Foreign Agricultural Service's Global Agricultural Trade System (GATS) data, in fourth quarter 2024, the U.S. grain export volumes to Mexico (and quarter-to-quarter changes) broke down as follows: 6.26 million metric tons (mmt) of corn (down 8 percent); 1.68 mmt of soybeans (up 41 percent); and 0.90 mmt of wheat (down 15 percent).

Year to year, U.S. exports destined to Mexico were up 14 percent for corn, up 7 percent for soybeans, and up 60 percent for wheat. According to the GATS data, from January to December 2024, exports to Mexico were up 36 percent for corn, up 4 percent for soybeans, and up 22 percent for wheat, compared to 2023. These rises occurred despite severe service challenges for barge and rail transportation in the second half of the year (GTR, September 19, 2024, first highlight).

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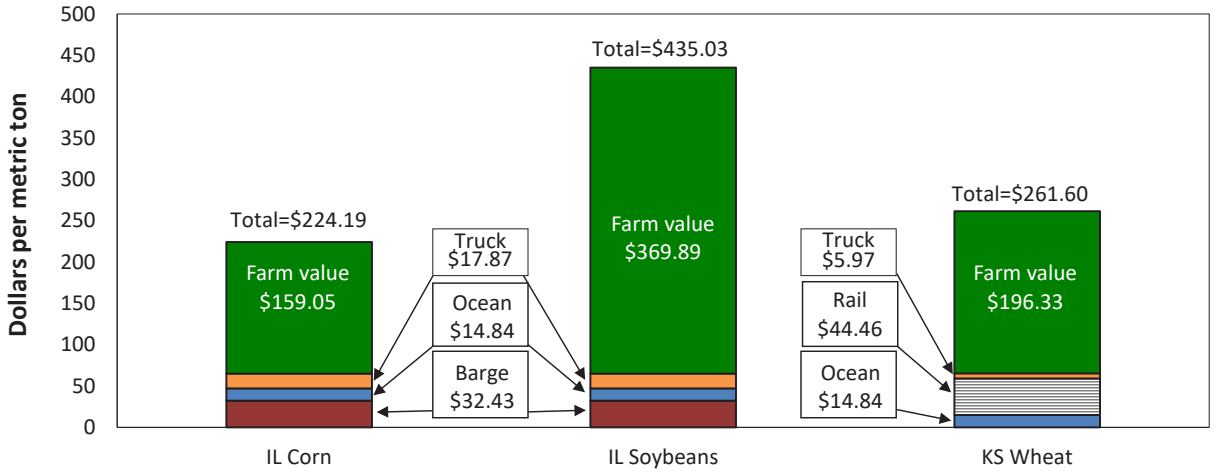
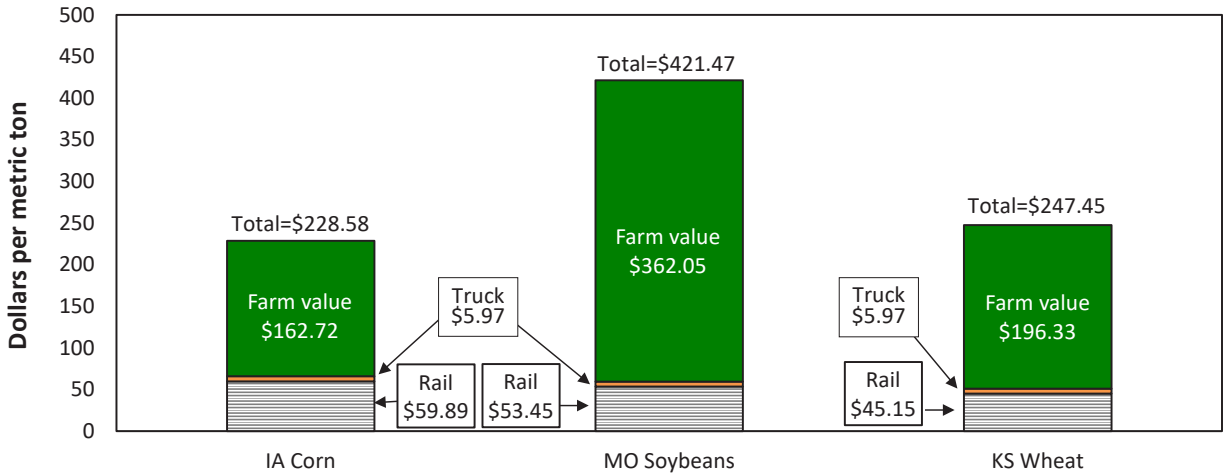
Figure 1. Fourth-quarter 2024 water-route landed costs to Veracruz, Mexico



Note: IL = Illinois; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Figure 2. Fourth-quarter 2024 land-route landed costs to U.S.-Mexico border locations



Note: IIA = Iowa; MO = Missouri; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

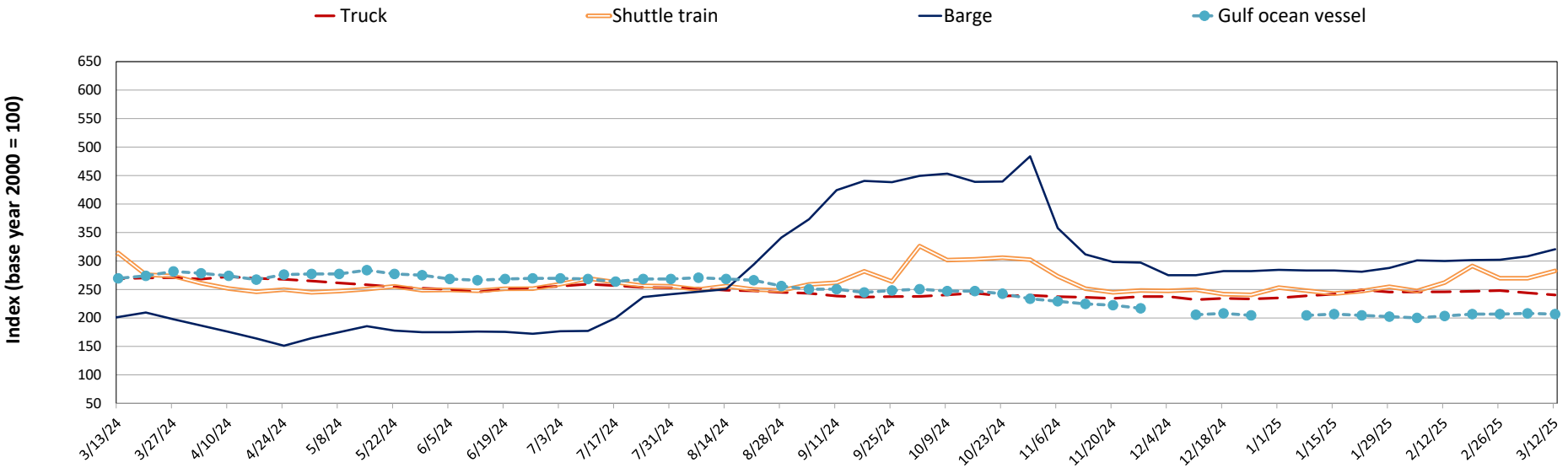
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
03/12/25	240	351	283	321	207	191
03/05/25	244	344	270	308	208	195
03/13/24	269	363	314	202	269	234

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.

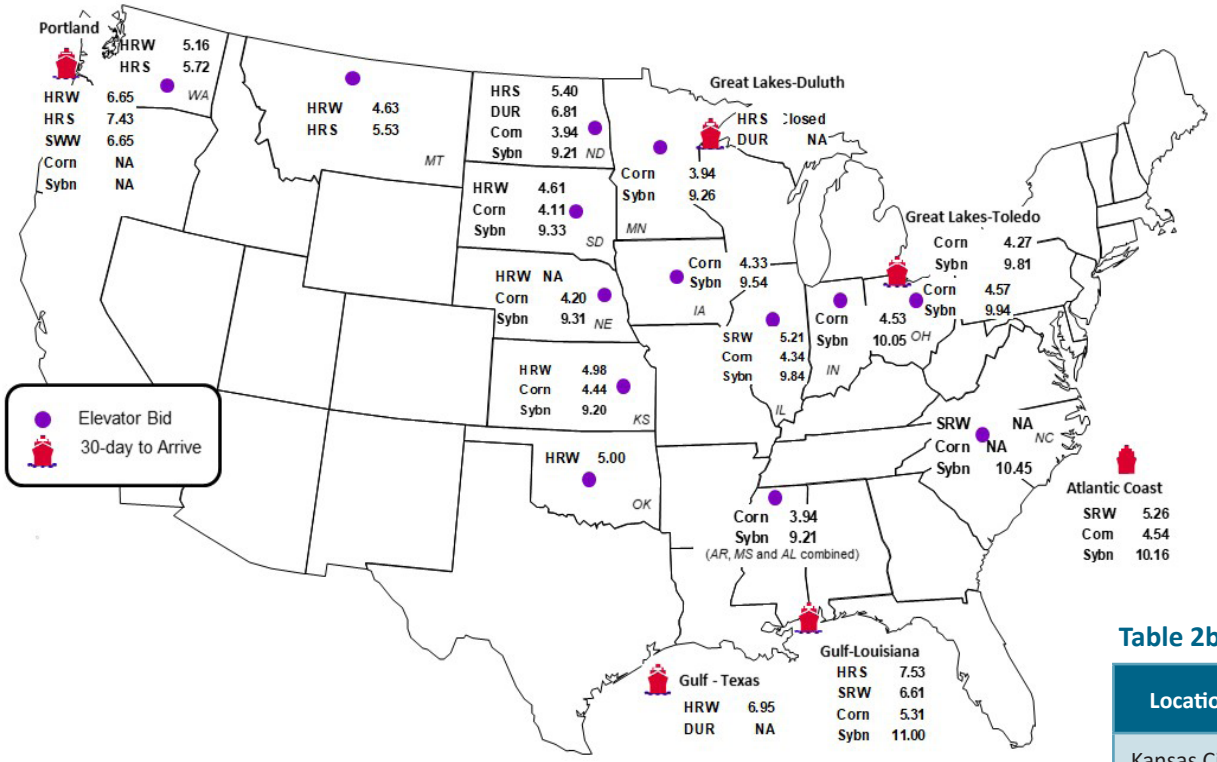
Figure 1. Grain transportation cost indicators as of week ending 3/12/25



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	3/7/2025	2/28/2025
Corn	IL–Gulf	-0.97	-1.05
Corn	NE–Gulf	-1.11	-1.20
Soybean	IA–Gulf	-1.46	-1.47
HRW	KS–Gulf	-1.97	-1.79
HRS	ND–Portland	-2.03	-1.80

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	3/7/2025	Week ago 2/28/2025	Year ago 3/8/2024
Kansas City	Wheat	May	5.790	5.742	5.866
Minneapolis	Wheat	May	5.926	5.976	6.626
Chicago	Wheat	May	5.616	5.562	5.340
Chicago	Corn	May	4.702	4.654	4.370
Chicago	Soybean	May	10.170	10.176	11.850

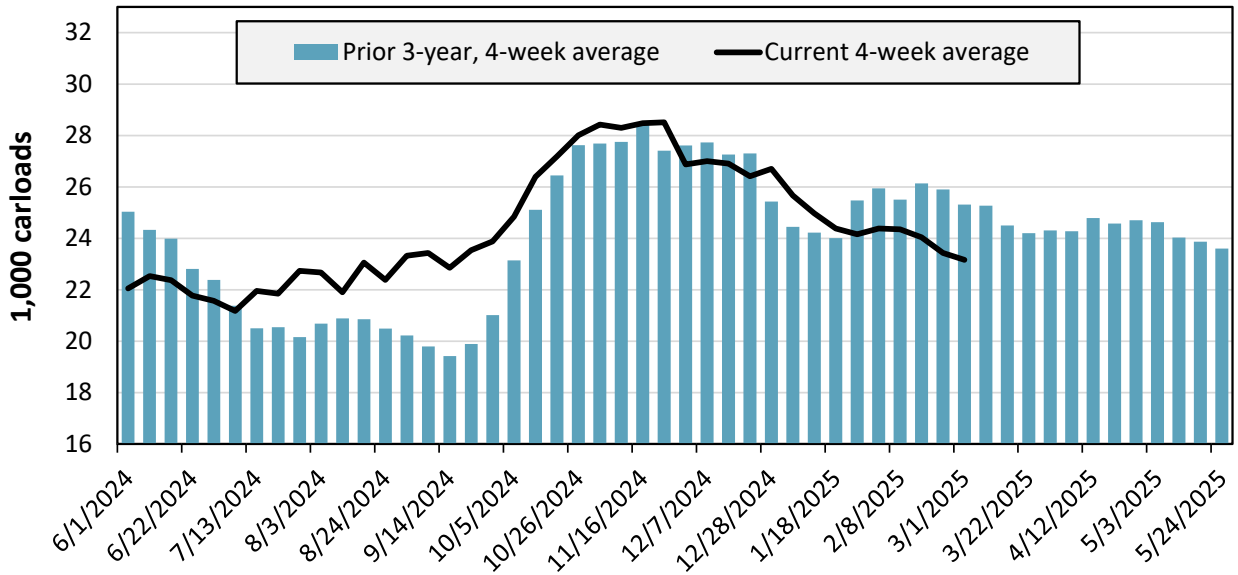
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 3/1/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,797	2,436	10,573	6,118	2,032	1,350	24,306
This week last year	1,649	2,886	10,278	4,671	3,531	903	23,918
2025 YTD	15,771	25,935	91,742	49,059	20,569	11,568	214,644
2024 YTD	15,693	25,301	94,053	46,751	27,689	10,357	219,844
2025 YTD as % of 2024 YTD	100	103	98	105	74	112	98
Last 4 weeks as % of 2024	109	101	85	106	68	110	91
Last 4 weeks as % of 3-yr. avg.	95	109	88	98	79	86	92
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 March 1, grain carloads were down 1 percent from the previous week, down 9 percent from last year, and down 8 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: 2/28/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	24.5	38.6	87.5	19.1	21.7	64.6	20.0	39.4
	Average over last 4 weeks	26.3	36.8	65.9	19.3	10.2	43.4	19.3	31.6
	Average of same 4 weeks last year	24.1	34.2	28.1	19.1	7.2	15.9	12.0	20.1
Grain unit train speeds (miles per hour)	This week	21.9	18.5	24.1	22.0	24.3	20.0	24.2	22.1
	Average over last 4 weeks	21.7	18.4	24.1	22.1	22.9	21.0	23.9	22.0
	Average of same 4 weeks last year	23.4	17.4	24.3	22.5	25.6	23.4	27.2	23.4

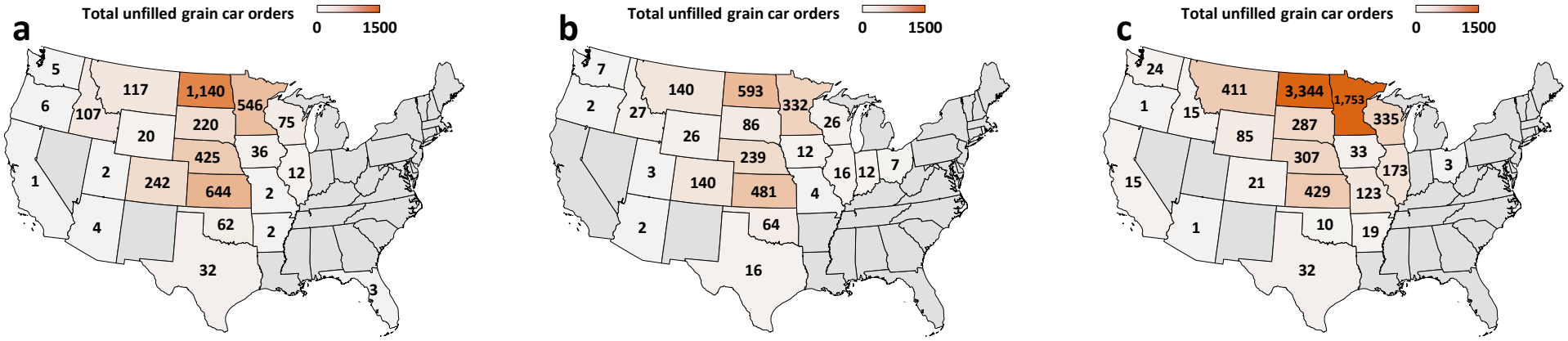
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 2/28/2025		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	88	5	992	100	20	22	91	1,319
	Average over last 4 weeks	74	6	865	103	16	52	39	1,155
	Average of same 4 weeks last year	27	11	600	109	4	38	35	822
Loaded grain cars not moved in over 48 hours (number)	This week	63	210	1,787	52	17	393	12	2,533
	Average over last 4 weeks	77	241	1,576	74	13	259	9	2,248
	Average of same 4 weeks last year	39	271	857	101	5	63	22	1,358
Grain unit trains held (number)	This week	1	0	31	9	0	3	2	46
	Average over last 4 weeks	1	1	42	8	0	4	2	57
	Average of same 4 weeks last year	1	5	24	6	0	3	7	45
Unfilled manifest grain car orders (number)	This week	3	0	1,606	1,451	0	643	0	3,703
	Average over last 4 weeks	21	1	847	946	0	421	0	2,235
	Average of same 4 weeks last year	3	0	6,070	497	0	849	32	7,450

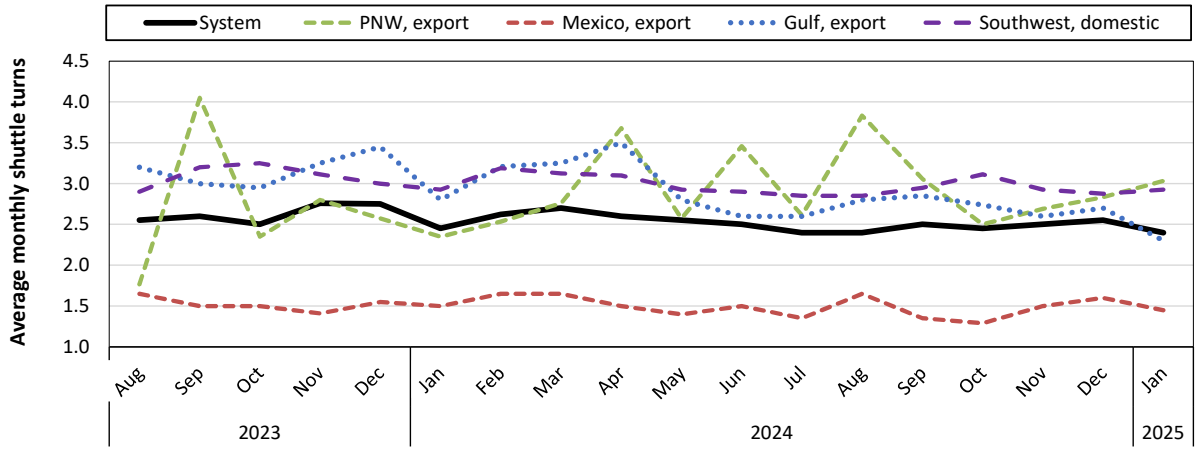
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 2/28/2025 (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

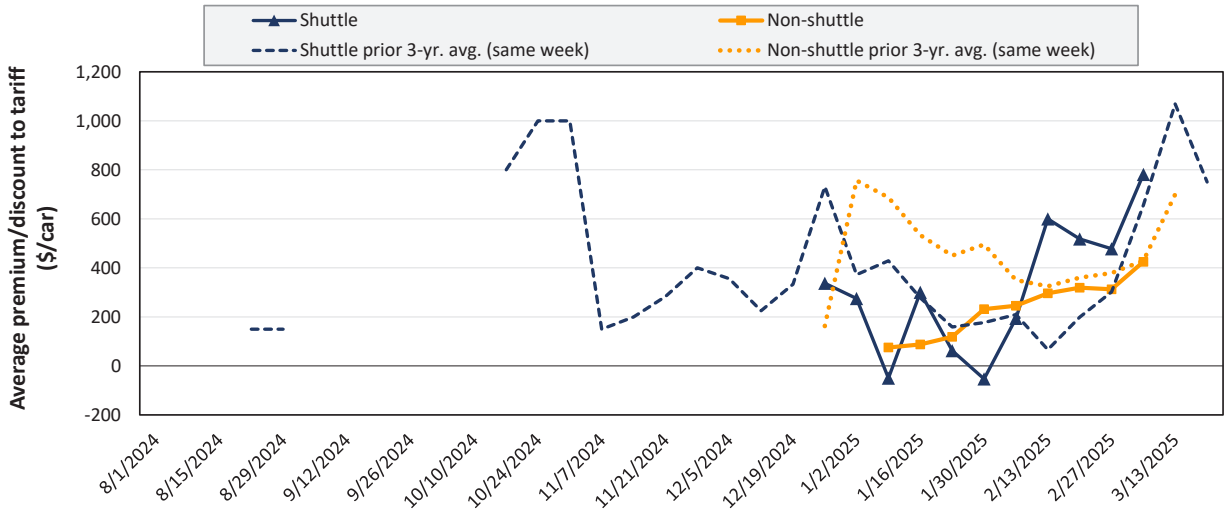


Average monthly systemwide grain shuttle turns for January 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.03 to PNW, 1.45 to Mexico, 2.3 to the Gulf, and 2.93 to the Southwest.

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 March 2025



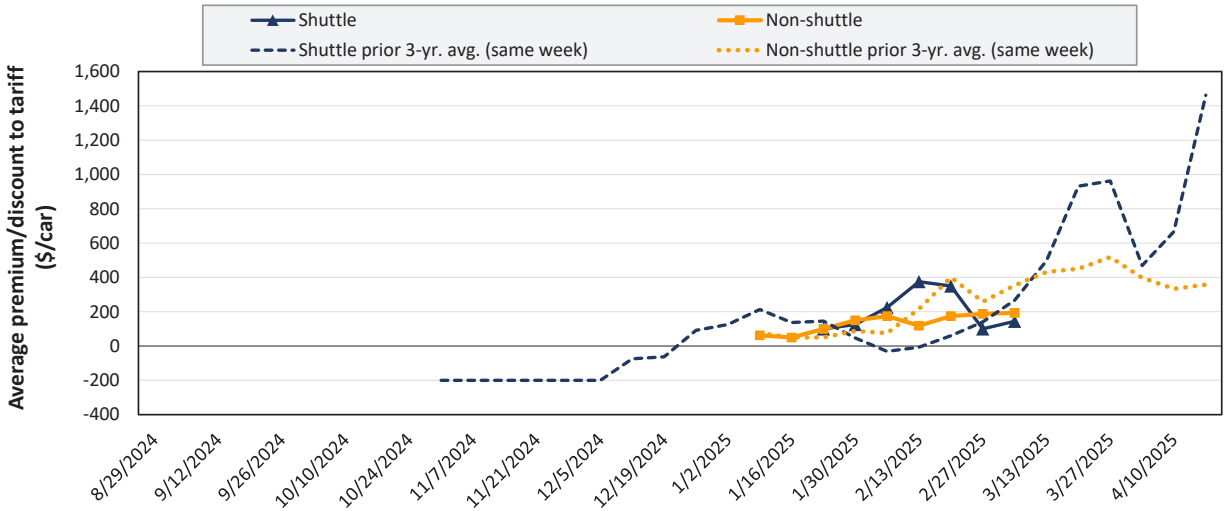
Average non-shuttle bids/offers rose $113 this week, and are at the peak.

Average shuttle bids/offers rose $304 this week and are at the peak.

3/6/2025	BNSF	UP
Non-Shuttle	$700	$150
Shuttle	$1,417	$147

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 April 2025



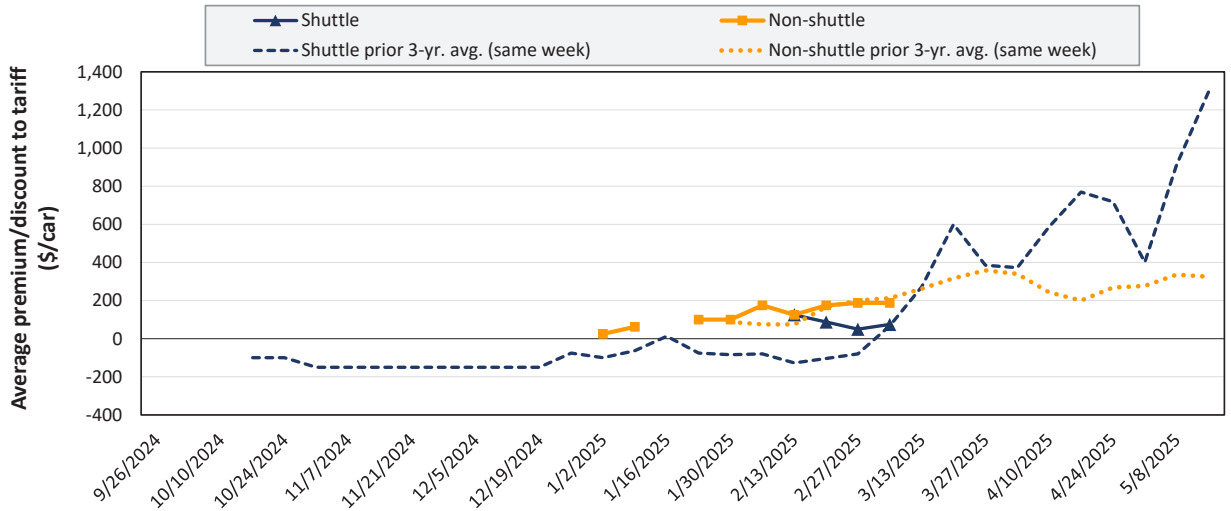
Average non-shuttle bids/offers rose $6 this week, and are at the peak.

Average shuttle bids/offers rose $44 this week and are $231 below the peak.

3/6/2025	BNSF	UP
Non-Shuttle	$275	$113
Shuttle	$388	-$100

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 May 2025



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

Average shuttle bids/offers rose $25 this week and are $50 below the peak.

3/6/2025	BNSF	UP
Non-Shuttle	$300	$75
Shuttle	$75	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: 3/6/2025		Delivery period					
		Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25
Non-shuttle	BNSF	700	275	300	n/a	n/a	n/a
	Change from last week	225	-25	0	n/a	n/a	n/a
	Change from same week 2024	-100	-225	100	n/a	n/a	n/a
	UP	150	113	75	n/a	n/a	n/a
	Change from last week	0	38	0	n/a	n/a	n/a
	Change from same week 2024	n/a	-388	-325	n/a	n/a	n/a
Shuttle	BNSF	1,417	388	75	n/a	n/a	n/a
	Change from last week	498	88	25	n/a	n/a	n/a
	Change from same week 2024	-521	-363	-75	n/a	n/a	n/a
	UP	147	-100	n/a	n/a	n/a	n/a
	Change from last week	111	0	n/a	n/a	n/a	n/a
	Change from same week 2024	-1,070	-613	n/a	n/a	n/a	n/a
	CPKC	1,000	n/a	n/a	n/a	n/a	n/a
	Change from last week	900	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	500	n/a	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, March 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	$157	$51.12	$1.39	20
	Grand Forks, ND	Duluth-Superior, MN	$3,862	$30	$38.65	$1.05	9
	Wichita, KS	Los Angeles, CA	$7,020	$153	$71.23	$1.94	1
	Wichita, KS	New Orleans, LA	$4,425	$276	$46.68	$1.27	-9
	Sioux Falls, SD	Galveston-Houston, TX	$6,966	$126	$70.42	$1.92	4
	Colby, KS	Galveston-Houston, TX	$4,675	$302	$49.43	$1.35	-8
	Amarillo, TX	Los Angeles, CA	$5,585	$421	$59.64	$1.62	7
Corn	Champaign-Urbana, IL	New Orleans, LA	$5,385	$312	$56.57	$1.44	4
	Toledo, OH	Raleigh, NC	$8,877	$0	$88.15	$2.24	0
	Des Moines, IA	Davenport, IA	$3,619	$66	$36.59	$0.93	27
	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	$194	$48.65	$1.24	5
	Des Moines, IA	Los Angeles, CA	$6,585	$565	$71.00	$1.80	3
Soybeans	Minneapolis, MN	New Orleans, LA	$3,468	$448	$38.88	$1.06	6
	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	$312	$55.93	$1.52	4

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, March 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	$88	$44.00	$1.20	6
	Wichita, KS	Galveston-Houston, TX	$4,411	$69	$44.48	$1.21	6
	Chicago, IL	Albany, NY	$7,413	$0	$73.61	$2.00	0
	Grand Forks, ND	Portland, OR	$6,001	$152	$61.10	$1.66	4
	Grand Forks, ND	Galveston-Houston, TX	$5,446	$156	$55.63	$1.51	4
	Garden City, KS	Portland, OR	$6,695	$195	$68.42	$1.86	-
Corn	Minneapolis, MN	Portland, OR	$5,510	$185	$56.56	$1.44	-4
	Sioux Falls, SD	Tacoma, WA	$5,470	$170	$56.00	$1.42	-4
	Champaign-Urbana, IL	New Orleans, LA	$4,625	$312	$49.03	$1.25	5
	Lincoln, NE	Galveston-Houston, TX	$4,860	$99	$49.24	$1.25	5
	Des Moines, IA	Amarillo, TX	$5,125	$244	$53.32	$1.35	5
	Minneapolis, MN	Tacoma, WA	$5,510	$184	$56.54	$1.44	-4
	Council Bluffs, IA	Stockton, CA	$6,080	$190	$62.26	$1.58	3
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,185	$170	$63.10	$1.72	-4
	Minneapolis, MN	Portland, OR	$6,235	$185	$63.75	$1.74	-4
	Fargo, ND	Tacoma, WA	$6,085	$151	$61.92	$1.69	-4
	Council Bluffs, IA	New Orleans, LA	$5,550	$360	$58.69	$1.60	4
	Toledo, OH	Huntsville, AL	$5,564	$0	$55.25	$1.50	1
	Grand Island, NE	Portland, OR	$6,185	$507	$66.46	$1.81	3

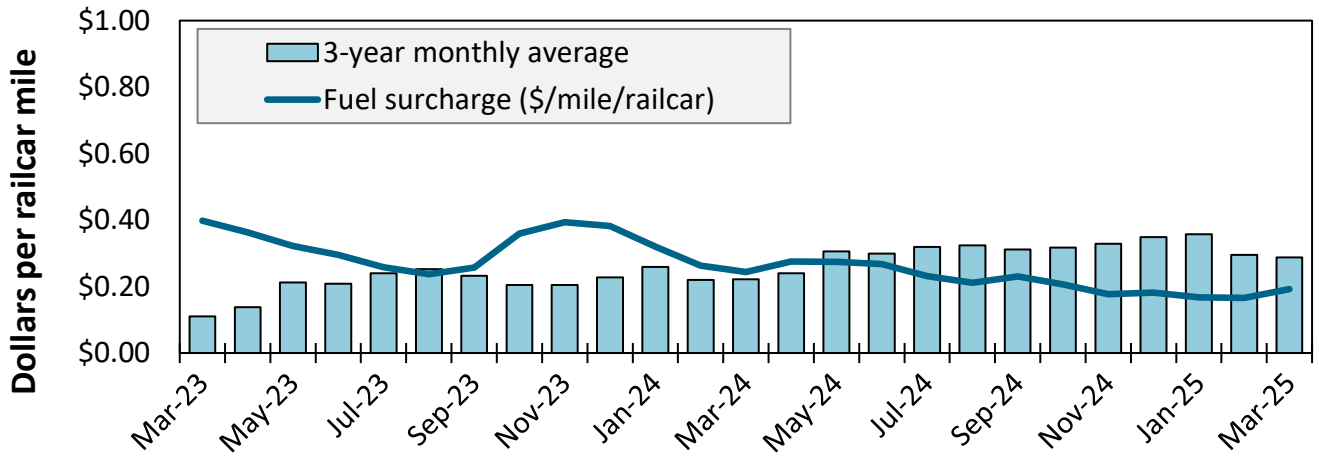
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, March 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	$4,688	$46.14	$1.17	0.8	5.0
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,565	$54.77	$1.39	0.9	0.8
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	$6,090	$59.94	$1.52	0.9	0.6
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,471	$53.85	$1.37	0.9	0.9
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,685	$55.95	$1.42	0.9	0.8
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,700	$46.26	$1.18	0.9	4.8
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,081	$50.01	$1.27	0.8	4.4
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,216	$51.34	$1.30	0.8	4.3
Corn	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,101	$50.20	$1.28	0.6	4.9
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,565	$54.77	$1.49	0.9	0.8
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,627	$65.22	$1.77	0.6	3.4
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,471	$53.85	$1.47	0.9	0.9
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,685	$55.95	$1.52	0.9	0.8
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,730	$66.24	$1.80	0.6	3.3
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,993	$39.30	$1.07	0.9	1.5
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$3,575	$35.19	$0.96	1.0	2.2
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,808	$47.32	$1.29	0.6	-8.5
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,471	$53.85	$1.47	0.9	0.9
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,594	$45.21	$1.23	0.5	-8.7

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).

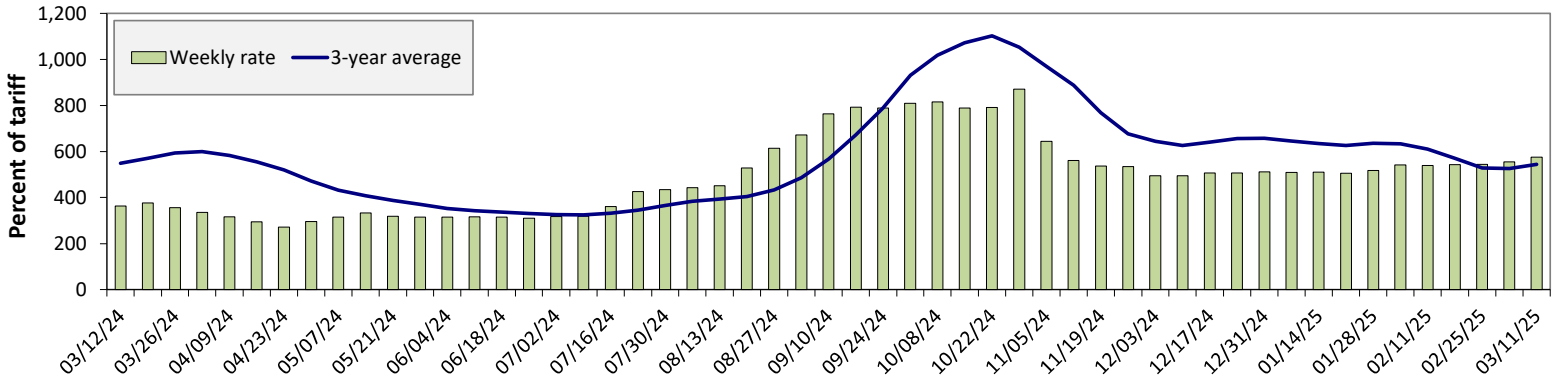
Figure 9. Railroad fuel surcharges, North American weighted average



March 2025: $0.19/mile, up 2 cents from last month’s surcharge of $0.17/mile; down 5 cents from the March 2024 surcharge of $0.24/mile; and down 10 cents from the March prior 3-year average of $0.29/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 March 11: 4 percent higher than the previous week; 59 percent higher than last year; and 6 percent higher 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

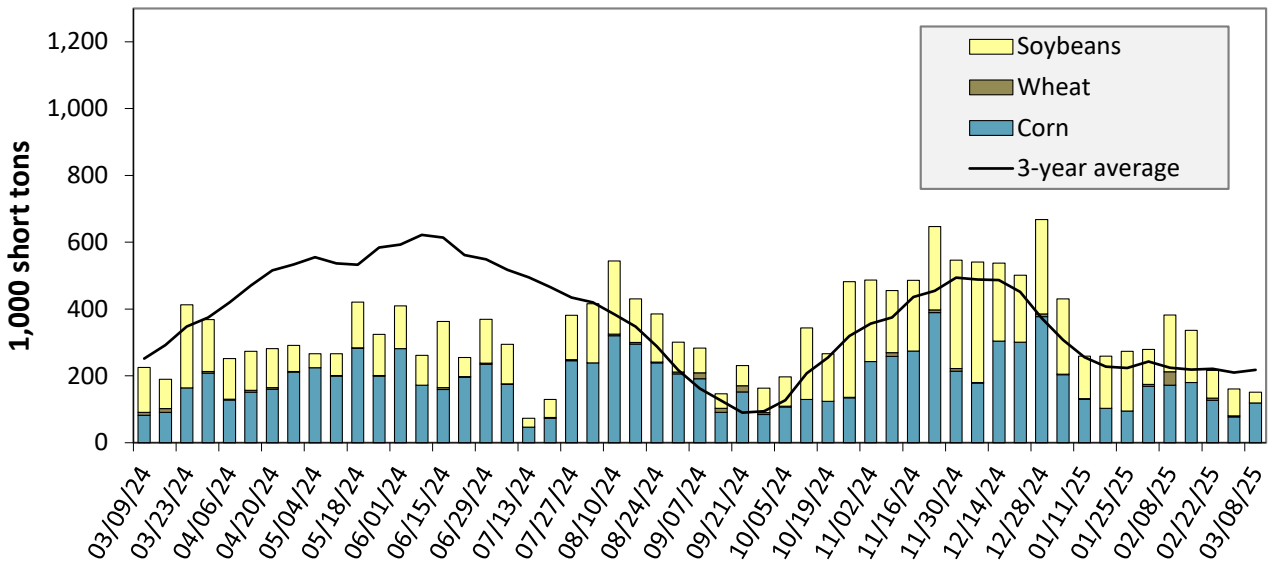
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	3/11/2025	n/a	572	577	434	452	357
	3/4/2025	n/a	540	555	460	480	348
$/ton	3/11/2025	n/a	30.43	26.77	17.32	21.20	11.21
	3/4/2025	n/a	28.73	25.75	18.35	22.51	10.93
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	n/a	49	59	65	44	45
	3-year avg.	n/a	-1	6	0	-10	-5
Rate	April	525	463	451	349	384	296
	June	465	408	398	310	328	274

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 March 8: 33 percent lower than last year and 31 percent lower than the 3-year average.

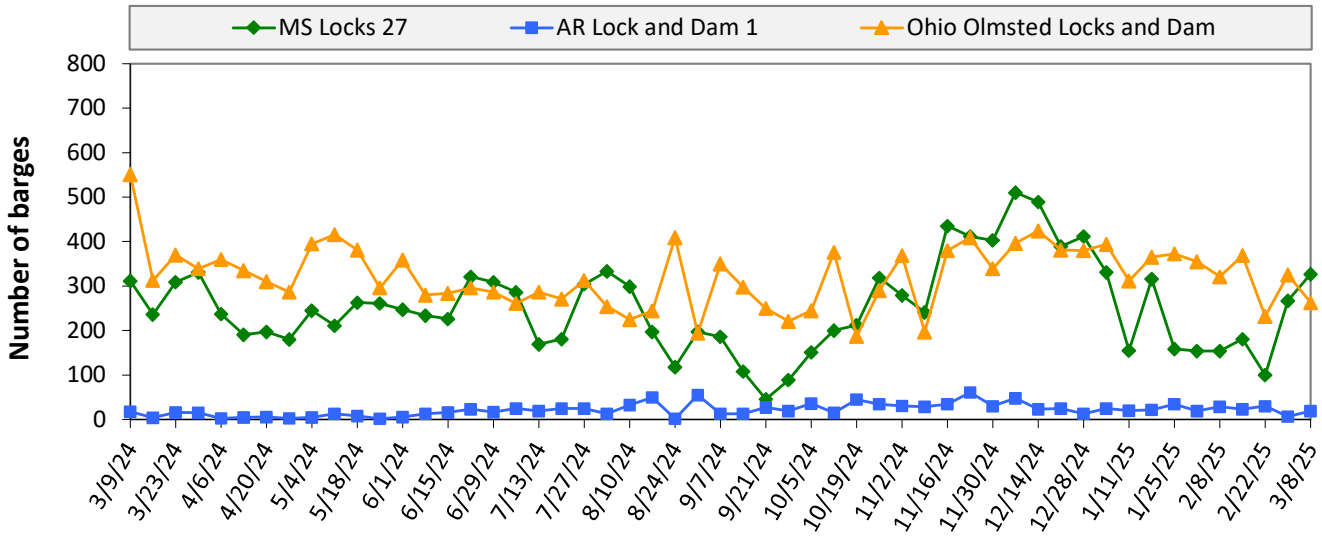
Note: The 3-year average is a 4-week moving average. The U.S. Army Corps of Engineers has recently migrated its lock and vessel database and has noted the latest data may be revised in coming weeks.
Source: U.S. Army Corps of Engineers.

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

For the week ending 03/08/2025	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))	145	0	60	0	205
Mississippi River (Granite City, IL (L27))	119	0	32	0	151
Illinois River (La Grange)	153	0	62	0	214
Ohio River (Olmsted)	126	2	65	0	193
Arkansas River (L1)	0	19	21	0	40
Weekly total - 2025	245	21	117	0	384
Weekly total - 2024	303	62	227	0	593
2025 YTD	2,818	168	2,355	20	5,362
2024 YTD	1,998	260	2,839	48	5,146
2025 as % of 2024 YTD	141	65	83	42	104
Last 4 weeks as % of 2024	108	48	72	0	86
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.

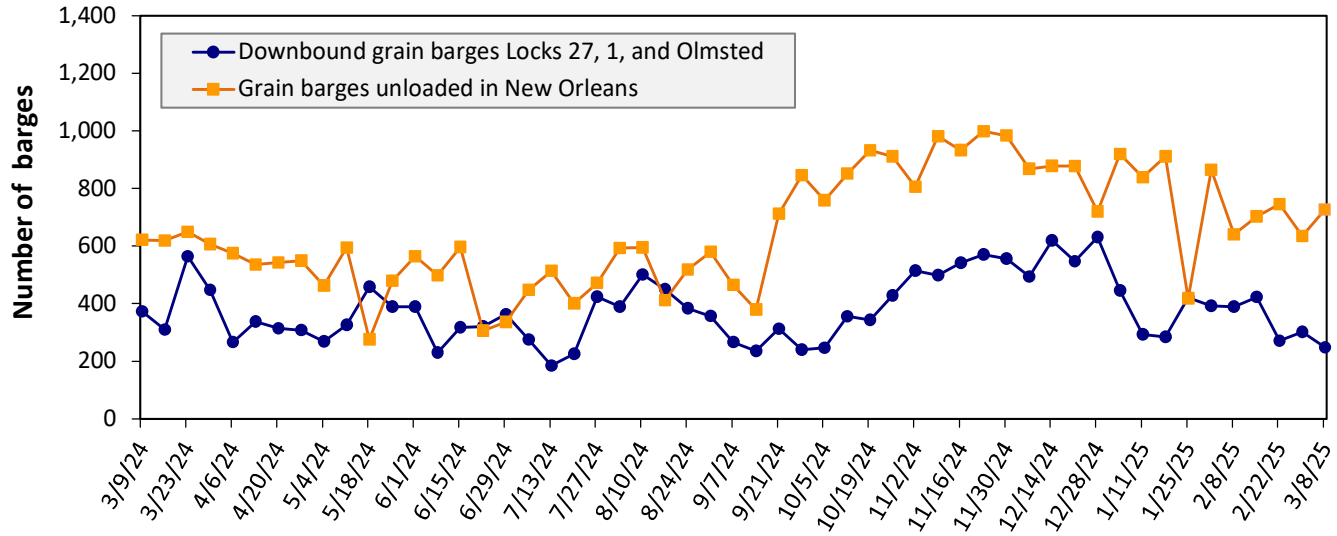
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending March 8: 609 barges transited the locks, 10 barges more than the previous week, and 13 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 March 8: 248 barges moved down river, 53 fewer than the previous week; 727 grain barges unloaded in the New Orleans Region, 14 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	
		March 2025	February 2025	March 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.55	$21.35	$20.83	3.4	6.0
	Central Ferry, WA/Almota, WA	$20.65	$20.45	$19.96	3.4	5.8
	Lyons Ferry, WA	$19.64	$19.44	$18.99	3.4	5.6
	Windust, WA/Lower Monumental, WA	$18.61	$18.41	$18.00	3.4	5.4
	Sheffler, WA	$18.58	$18.38	$17.97	3.4	5.4
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.38	$17.18	$16.82	3.3	5.0
	Port Kelly, WA/Wallula, WA	$17.16	$16.96	$16.61	3.3	5.0
	Umatilla, OR	$17.06	$16.86	$16.51	3.3	4.9
	Boardman, OR/Hogue Warner, OR	$16.80	$16.60	$16.26	3.3	4.9
	Arlington, OR/Roosevelt, WA	$16.64	$16.44	$16.11	3.3	4.8
	Biggs, OR	$15.31	$15.11	$14.83	3.2	4.4
	The Dalles, OR	$14.21	$14.01	$13.77	3.2	4.0

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)

February, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	320	0	320
Columbia River (Bonneville Lock and Dam (L1))	355	0	355
Monthly total 2025	355	0	355
Monthly total 2024	71	0	71
2025 YTD	756	0	756
2024 YTD	343	0	343

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.

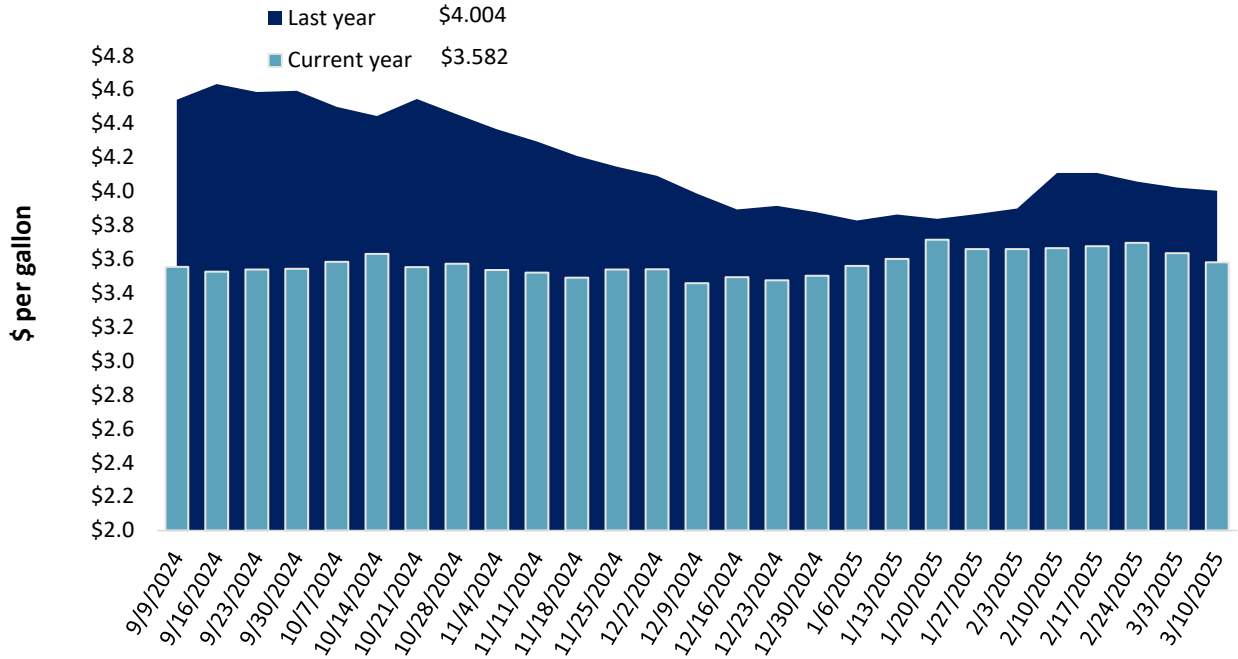
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 3/10/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.699	-0.043	-0.421
	New England	4.031	-0.006	-0.256
	Central Atlantic	3.907	-0.019	-0.402
	Lower Atlantic	3.587	-0.056	-0.446
II	Midwest	3.497	-0.054	-0.416
III	Gulf Coast	3.284	-0.059	-0.418
IV	Rocky Mountain	3.414	-0.064	-0.578
V	West Coast	4.250	-0.053	-0.401
	West Coast less California	3.768	-0.061	-0.398
	California	4.807	-0.043	-0.400
Total	United States	3.582	-0.053	-0.422

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 March 10, the U.S. average diesel fuel price decreased 5.3 cents from the previous week to $3.582 per gallon, 42.2 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 2/27/2025	1,406	798	1,522	1,314	77	5,116	21,739	6,699	33,554
	This week year ago	955	1,969	1,686	937	110	5,656	17,871	5,516	29,043
	Last 4 wks. as % of same period 2023/24	139	45	99	154	86	98	124	145	123
Current shipped (cumulative) exports sales	2024/25 YTD	3,559	2,266	4,988	4,121	249	15,183	27,828	37,687	80,699
	2023/24 YTD	2,355	2,663	4,529	2,864	351	12,762	21,357	33,774	67,893
	YTD 2024/25 as % of 2023/24	151	85	110	144	71	119	130	112	119
	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 2/27/2025	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	17,859	17,291	3	17,746
Japan	7,753	6,323	23	9,366
China	32	1,781	-98	8,233
Colombia	5,006	3,944	27	4,383
Korea	2,955	1,220	142	1,565
Top 5 importers	33,606	30,558	10	41,293
Total U.S. corn export sales	49,567	39,228	26	51,170
% of YTD current month's export projection	80%	67%	-	-
Change from prior week	909	1,110	-	-
Top 5 importers' share of U.S. corn export sales	68%	78%	-	81%
USDA forecast March 2025	62,233	58,220	7	-
Corn use for ethanol USDA forecast, March 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 2/27/2025	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	21,156	22,393	-6	28,636
Mexico	3,864	3,949	-2	4,917
Japan	1,489	1,695	-12	2,231
Egypt	2,449	482	408	2,228
Indonesia	1,126	1,259	-11	1,910
Top 5 importers	30,084	29,778	1	39,922
Total U.S. soybean export sales	44,386	39,290	13	51,302
% of YTD current month's export projection	89%	85%	-	-
Change from prior week	353	614	-	-
Top 5 importers' share of U.S. soybean export sales	68%	76%	-	78%
USDA forecast, March 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 2/27/2025	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	3,889	2,930	33	3,298
Philippines	2,512	2,722	-8	2,494
Japan	1,949	1,827	7	2,125
China	139	2,472	-94	1,374
Korea	2,178	1,347	62	1,274
Taiwan	954	997	-4	921
Nigeria	531	243	119	920
Thailand	862	452	91	552
Colombia	421	274	54	522
Vietnam	498	417	20	313
Top 10 importers	13,931	13,680	2	13,792
Total U.S. wheat export sales	20,299	18,418	10	18,323
% of YTD current month's export projection	89%	96%	-	-
Change from prior week	339	271	-	-
Top 10 importers' share of U.S. wheat export sales	69%	74%	-	75%
USDA forecast, March 2025	22,725	19,241	18	-

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.

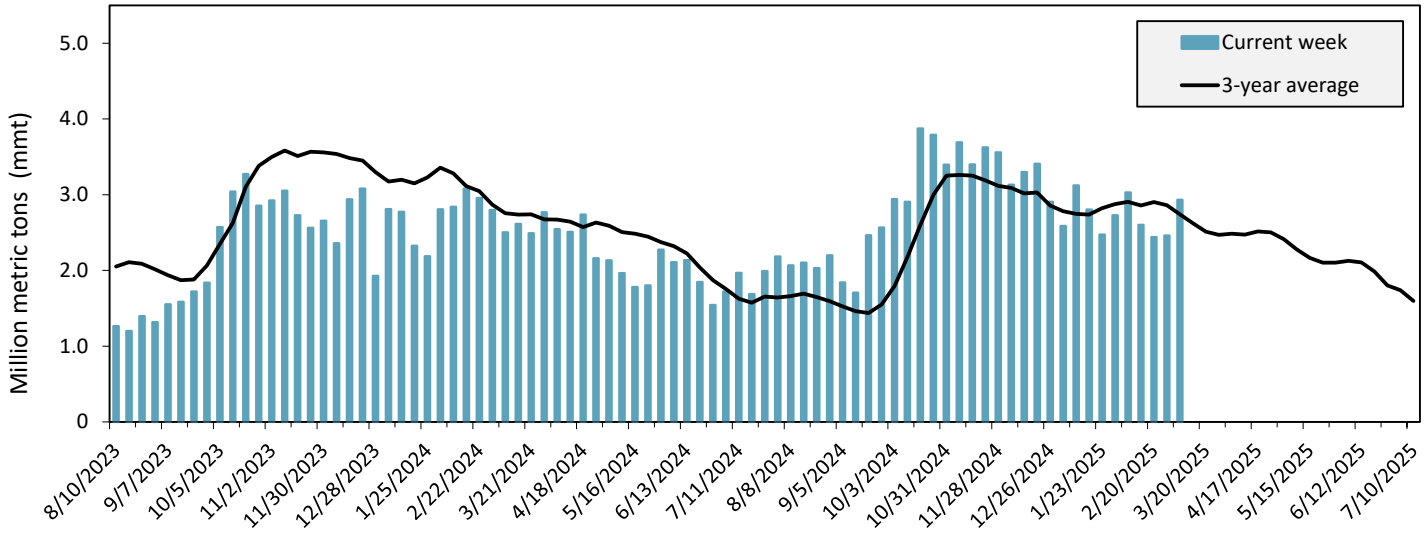
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 03/06/2025	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	741	258	287	4,169	2,644	158	132	219	13,987
	Soybeans	68	128	53	1,318	2,251	59	44	44	10,445
	Wheat	50	243	20	1,683	1,829	92	71	62	11,453
	All grain	858	629	136	7,239	7,181	101	86	100	37,186
Mississippi Gulf	Corn	786	842	93	6,641	4,167	159	153	112	27,407
	Soybeans	646	424	153	5,771	7,128	81	72	87	29,741
	Wheat	67	4	n/a	524	937	56	40	63	4,523
	All grain	1,499	1,270	118	12,937	12,287	105	99	98	61,789
Texas Gulf	Corn	33	16	214	92	90	102	164	175	570
	Soybeans	0	0	n/a	86	0	n/a	n/a	25145	741
	Wheat	31	62	51	424	250	170	131	91	1,940
	All grain	118	82	143	683	1,287	53	77	70	6,965
Interior	Corn	259	225	115	1,981	2,300	86	89	107	13,463
	Soybeans	123	142	87	1,193	1,641	73	75	85	8,059
	Wheat	68	82	83	504	491	103	103	92	2,952
	All grain	451	460	98	3,709	4,485	83	86	96	24,753
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	22	30	75	n/a	n/a	653
	All grain	0	0	n/a	22	30	75	n/a	n/a	1,060
Atlantic	Corn	1	12	8	58	94	61	20	43	410
	Soybeans	7	6	105	402	388	104	147	65	1,272
	Wheat	0	0	n/a	0	5	0	n/a	n/a	73
	All grain	8	18	42	460	487	94	97	62	1,754
All Regions	Corn	1,820	1,353	135	12,940	9,294	139	130	132	56,109
	Soybeans	844	700	121	8,874	11,461	77	72	79	50,865
	Wheat	216	391	55	3,158	3,542	89	70	69	21,594
	All grain	2,934	2,460	119	25,154	25,810	97	92	96	133,979

*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 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2024, approximately 48 percent of the U.S. export grain shipments departed through the U.S. Gulf region and 27 percent departed through the PNW.

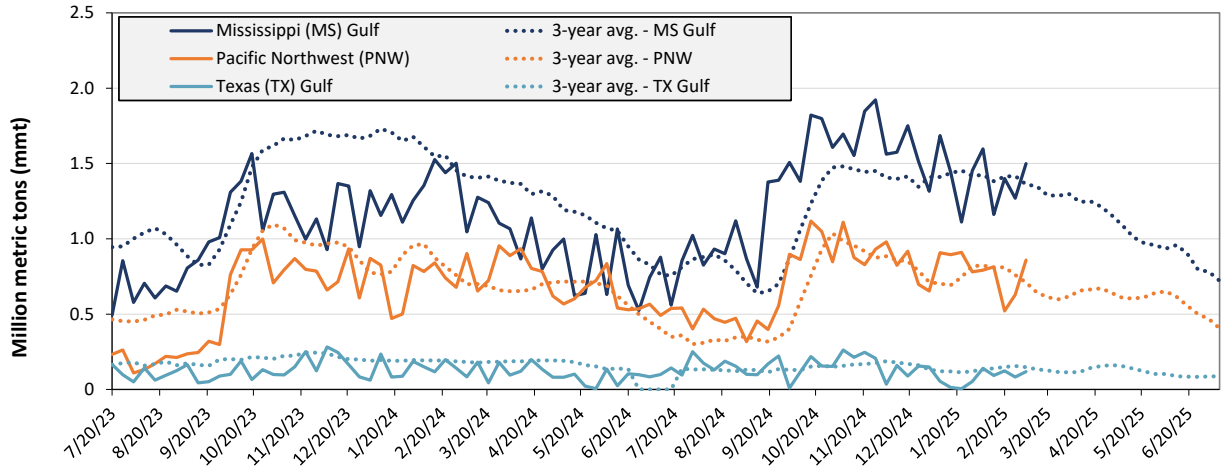
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Mar. 06: 2.9 mmt of grain inspected, up 19 percent from the previous week, up 14 percent from the same week last year, and up 7 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 03/06/25 inspections (mmt):
MS Gulf: 1.5
PNW: 0.86
TX Gulf: 0.12

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 18	up 43	up 20	up 3 6
Last year (same 7 days)	up 45	up 36	up 44	down 11
3-year average (4-week moving average)	up 10	down 20	up 7	up 21

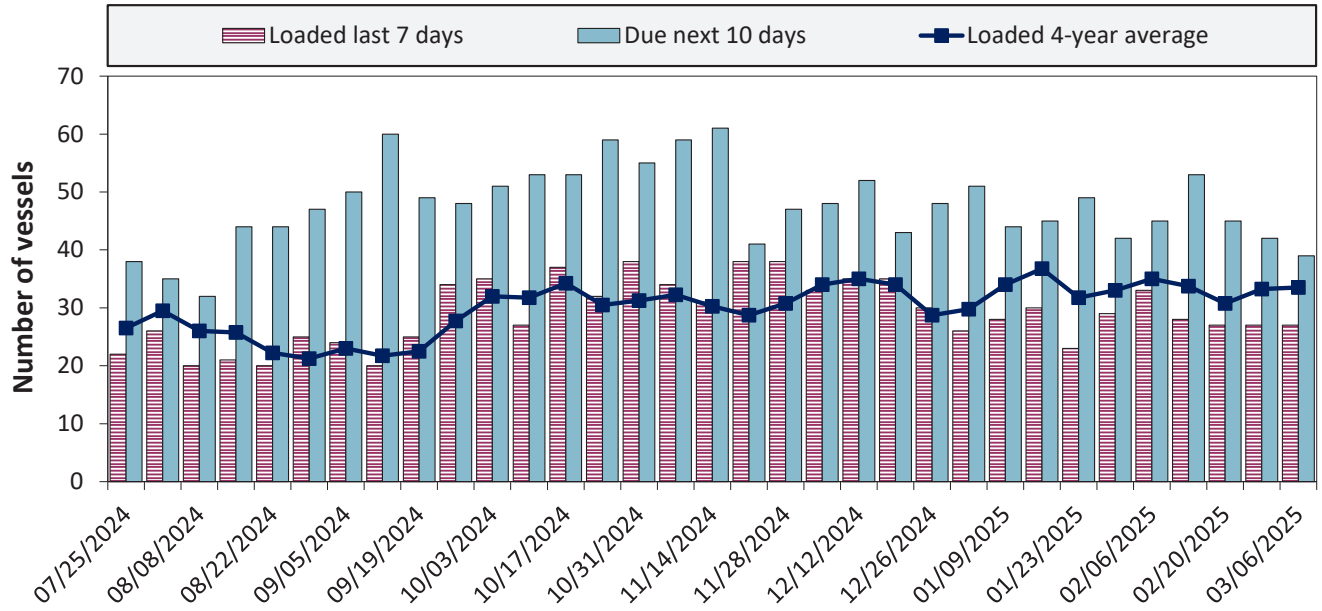
Source: USDA, Federal Grain Inspection Service.

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
3/6/2025	40	27	39	20
2/27/2025	39	27	42	18
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.

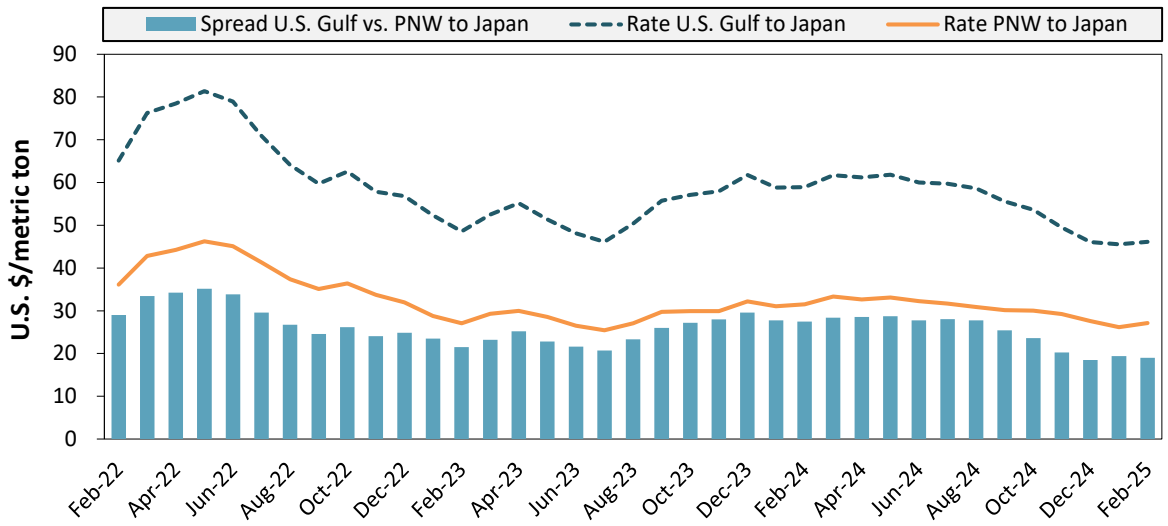
Figure 19. U.S. Gulf vessel loading activity



Week ending 03/06/25, number of vessels	Loaded	Due
Change from last year	0%	-29%
Change from 4-year average	-19%	-27%

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
February 2025	$46	$27	$19
Change from February 2024	-22%	-14%	-31%
Change from 4-year average	-18%	-13%	-24%

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

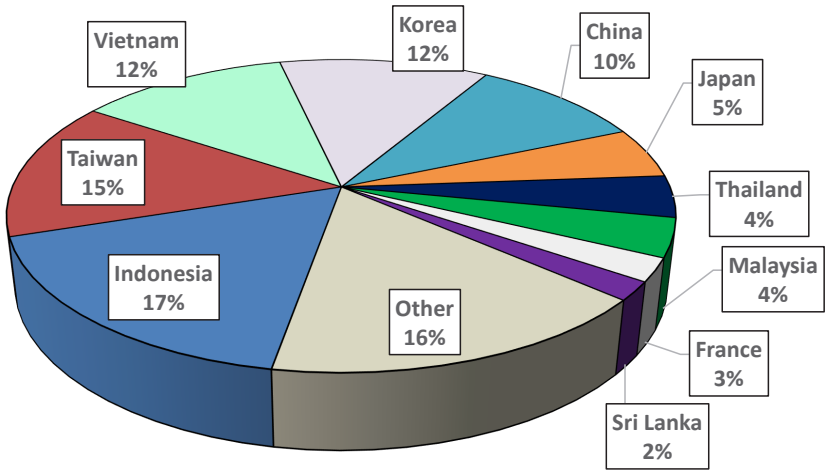
Table 20. Ocean freight rates for selected shipments, week ending 3/8/2025

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	Colombia	Wheat	Feb 25, 2025	Mar 15/25, 2005	33,400	89.01
U.S. Gulf	Colombia	Soybean Meal	May 7, 2024	May 20/30, 2024	3,000	28.30
PNW	Taiwan	Wheat	Mar 6, 2025	Apr 1/20, 2025	51,700	36.85
PNW	S. Korea	Heavy grain	Feb 28, 2025	Apr 5/May 5, 2025	65,000	28.00
PNW	S. Korea	Corn	Feb 20, 2025	Mar 1/20, 2025	60,000	28.90
PNW	China	Heavy grain	Feb 12, 2025	Mar 1/30, 2025	50,000	27.50
PNW	Japan	Wheat & Corn	Feb 25, 2025	Mar 1/20, 2025	35,000	32.85
Brazil	China	Heavy grain	Feb 28, 2025	Apr 1/10	63,000	33.00
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	Indonesia	Heavy grain	Jan 23, 2025	Feb 23/24, 2025	62,000	34.50

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.

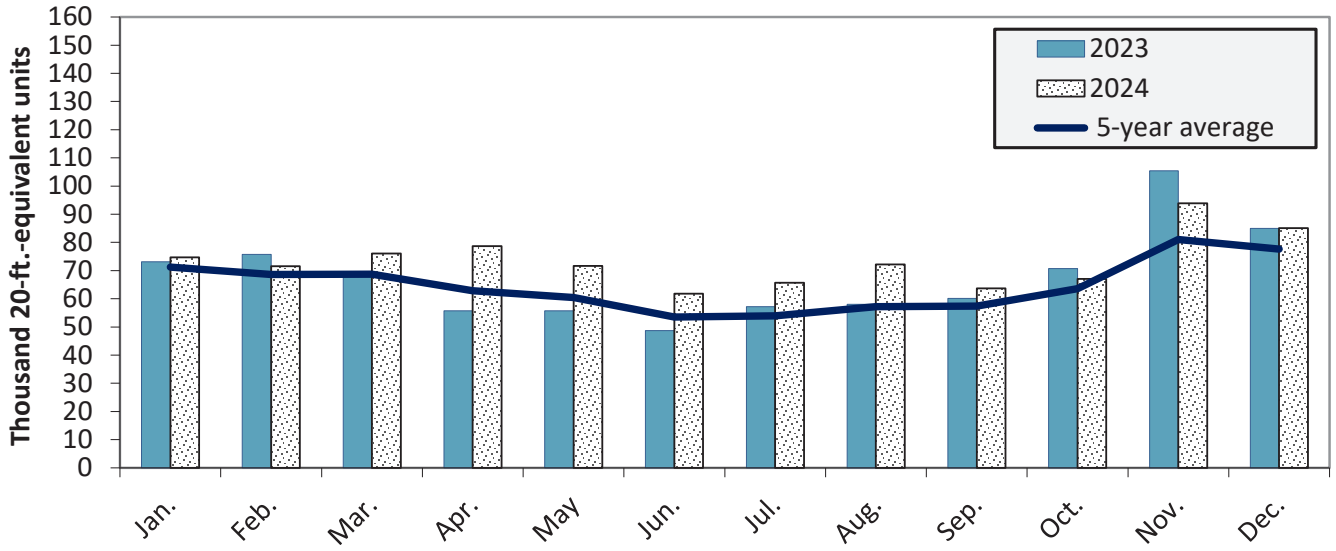
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined 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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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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