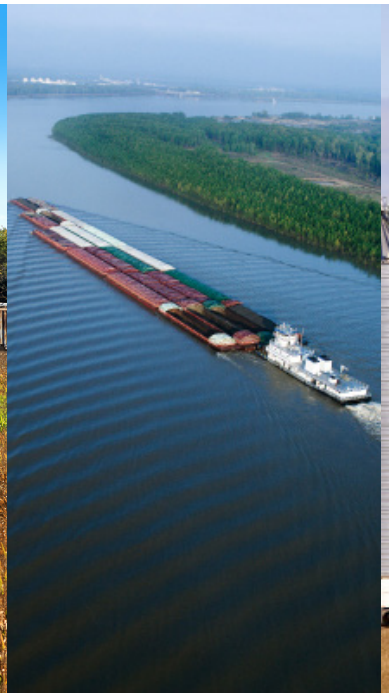
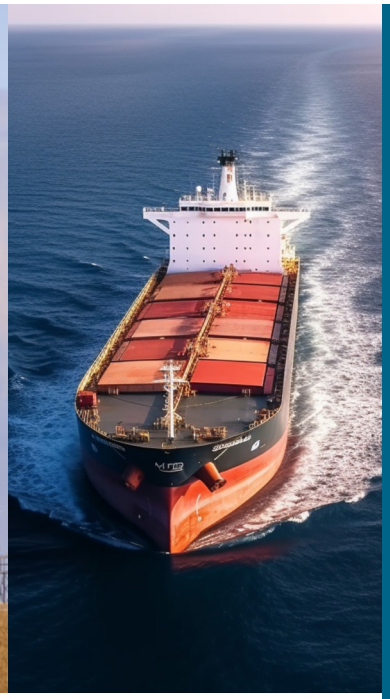
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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Upper Mississippi River Shipping Opens for the Season. On March 20, the U.S. Army Corps of Engineers announced that the first barge tow of the season had arrived at St. Paul, MN—the last Upper Mississippi River port to open each year because of ice on Lake Pepin. Marking the unofficial start to the navigation season, the motor vessel *Neil N. Diehl* was the first to pass through Lock and Dam 2, in Hastings, MN, with nine barges. The Upper Mississippi River had been closed since December 1, 2024.

Each winter, because of cold weather and icy conditions, the Upper Mississippi River closes to barge traffic. On average, the first tow of the season occurs in the third week of March. Last year, the first tow arrived on March 17. In 1983, 1984, and 2000, a tow reached St. Paul on March 4—the earliest arrival date on record.

With the Upper Mississippi River navigation open, the system will continue to provide safe, reliable, and cost-effective waterborne transportation for fertilizers that farmers depend on to grow corn and soybeans.

Lock and Dam 27 and Melvin Price Main Chamber Opening Delayed. According to American Commercial Barge Line, reopenings of two Mid-Mississippi River locks have been delayed: the main chamber at Melvin Price Lock and Dam (Alton, IL) will not reopen until April 4, and Lock and Dam 27 (near St. Louis, MO) will not reopen until April 11. The auxiliary chambers at both locks continue to operate.

Both locks closed on January 1 and were formerly scheduled to open on April 1. The main chamber at Melvin Price Lock and Dam closed to replace three older lift gates damaged during a 2018 barge strike, with a slight delay in replacing the third gate. The main chamber of Lock and Dam 27 was originally closed to repair lock wall embedded metal, but repair of a newly discovered crack in a liftgate delayed the opening. The closures have delayed barges by 2 to 4 days through the area.

In 2024, 16.7 million tons of grain moved through Melvin Price Lock and Dam, and 17.1 million tons of grain moved through Lock and Dam 27—the southernmost lock on the Mississippi River System.

FMCSA Study Highlights Need for Centralized Truck Parking Database. The Federal Motor Carrier Safety Administration (FMCSA) recently released a study, on current use of available parking along Interstate I-80 in Iowa and I-94 in Wisconsin, respectively. The study included a pilot program for a new truck parking management app, ParkUnload.

FMCSA confirmed the critical need for additional truck parking, particularly overnight, but also short-term (both day and night). FMCSA also found truckers were reluctant to adopt mobile apps that provide detailed, real-time information about parking availability. The underuse of the apps led to parking in unauthorized locations, including entrances, exits, and rest areas along the studied corridors.

The FMCSA study cited insufficient funding as a major obstacle in expanding truck parking to meet current and future demand. FMCSA recommended driver education and engagement to increase use of parking apps. I-80 and I-94 are major corridors for transporting grain.

Comments Requested on Water Resources Development Act. Enacted on January 4, the Thomas R. Carper Water Resources Development Act of 2024 (WRDA) is a comprehensive package that provides for the conservation and development of water and related resources. Until April 30, the public is invited to comment on WRDA's implementation.

Included in WRDA, a critical provision for the modernization of the inland waterways system permanently adjusts the Inland Waterways Trust Fund (IWTF) cost share requirement—for lock and dam construction and major rehabilitation projects—from 35 percent IWTF funds and 65 percent general federal revenues (previously) to 25 percent IWTF funds and 75 percent general funds.

WRDA allows the Secretary of the Army to conduct studies, construct projects, and research activities that can improve rivers and harbors. It is strictly authorizing legislation and does not include funding, which is provided through the Annual Energy and Water Development appropriations or supplemental appropriations.

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 March 13, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 31.90 million metric tons (mmt), down 3 percent from last week and up 18 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.50 mmt, up 55 percent from last week. Net **soybean export sales** were 0.35 mmt, down 53 percent from last week. Net **wheat export sales** for MY 2024/25 were –0.25 mmt, down 132 percent from last week.

Rail

U.S. Class I railroads originated 25,678 **grain carloads** during the week ending March 15. This was a 1-percent decrease from the previous week, 4 percent more than last year, and 10 percent more than the 3-year average.

Average April **shuttle secondary railcar bids/offers** (per car) were $184 above tariff for the week ending March 20. This was $9 less than last week and $447 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $156 above tariff. This was $44 less than last week and $438 lower than this week last year.

Barge

For the week ending March 22, **barged grain movements** totaled 670,400 tons. This was 9 percent less than the previous week and 21 percent less than the same period last year.

For the week ending March 22, 459 grain barges **moved down river**—48 fewer than last week. There were 853 grain barges **unloaded** in the New Orleans region, 21 percent more than last week.

Ocean

For the week ending March 20, 26 **oceangoing grain vessels** were loaded in the Gulf—24 percent fewer than the same period last year. Within the next 10 days (starting March 21), 41 vessels were expected to be loaded—5 percent fewer than the same period last year.

As of March 20, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $47.50, up 3 percent from the previous week. The rate from the Pacific Northwest to Japan was $27.50 per mt, up 2 percent from the previous week.

Fuel

For the week ending March 24, the U.S. average **diesel price** increased 1.8 cents from the previous week, to $3.567 per gallon—46.7 cents below the same week last year.

Soybean Landed Costs Varied in Fourth Quarter 2024

Both the United States and Brazil compete for the same overseas markets for soybean exports. The competitiveness of soybeans, for both countries, depends on low transportation and landed costs (i.e., transportation costs plus farm values) to China and Europe—the key export destinations. This article compares quarterly and yearly changes in the costs of moving soybeans from the United States and Brazil to Shanghai, China (table 1), and to Hamburg, Germany (table 2).

Quarter-to-Quarter Transportation Costs. Via the U.S. Gulf, from third to fourth quarter 2024 (quarter to quarter), total transportation costs for exporting U.S. soybeans to China rose from Minneapolis, MN, but fell from Davenport, IA. Costs from Minneapolis rose in response to higher truck and barge rates (table 1). Rising export sales sustained high barge rates, which were already elevated when the quarter began. Also, for most of the quarter, barge rates were kept aloft by restricted navigation (because of low water levels) in the Mississippi River System (*Grain Transportation Report (GTR), January 23, 2025*). However, from Davenport, IA, transportation costs fell because a drop in ocean freight rates outweighed the increases in truck and barge rates.

Via the Pacific Northwest (PNW), transportation costs fell for shipping to China from Fargo, ND, and Sioux Falls, SD. This decrease was in response to lower rail and ocean freight rates (table 1). For all PNW and Gulf routes, ocean freight rates fell because of lower demand for shipping bulk items (such as iron ore and coal) and the gradual lifting of transit restrictions (imposed for low water), at the Panama Canal (*GTR, January 30, 2025*).

The cost of shipping soybeans increased to Hamburg, Germany (Europe) through the U.S. Gulf from both Minneapolis and Davenport (table 2).

For all PNW and Gulf routes, U.S. truck rates rose because of a strong demand for trucking following the fall harvest. Brazil's transportation costs to China and Europe fell in response to lower truck and ocean freight rates (tables 1 and 2).

Year-to-Year Transportation Costs. Via the U.S. Gulf, from fourth quarter 2023 to fourth quarter 2024 (year to year), transportation costs to China rose for shipping from Minneapolis, but fell from Davenport, IA. Via the PNW, costs to China also fell from Fargo, ND, and Sioux Falls, SD. Costs to Europe through the U.S. Gulf rose from both Minneapolis and Davenport.

For all Gulf routes—except Davenport to China—higher truck and barge rates pushed up transportation costs. For all Gulf routes, ocean freight rates fell.

Brazil's transportation costs fell year to year. Lower truck rates were the main driver of Brazil's lower total transportation costs.

Quarter-to-Quarter Landed Costs. Except for shipments from Brazil's North Mato Grosso (North MT) – Santos, landed costs fell in both the United States and Brazil. For U.S. shipments to both China and Europe, landed costs fell because of declines in farm values or because of declines in both transportation costs and farm values.

In Brazil, landed costs fell for shipments out of South GO to China and Europe because declines in transportation costs exceeded rises in farm values. However, for shipments out of North Mato Grosso, landed costs rose because rises in farm values outweighed declines in transportation costs.

The share of fourth-quarter U.S. landed costs comprising transportation was 23-24 percent for shipments to China (table 1) and 18-20 percent to Europe (table 2). The transportation share of Brazil's total landed costs was 18-21 percent to China and 17-21 percent to Europe.

Year-to-Year Landed Costs. Year to year, landed costs fell in the United States and Brazil. For exports out of the United States, decreased landed costs reflected either lower farm values, or combined lower transportation costs and lower soybean farm values.

In Brazil, landed costs fell because of drops in both farm values and transportation costs.

U.S. Exports to China. According to USDA/ Foreign Agricultural Service's Global Agricultural Trade System data, in fourth quarter 2024, the United States exported 15.97 million metric tons (mmt) of soybeans to China—up sharply from 1.31 mmt in the previous quarter and up 17 percent from fourth quarter 2023.

According to USDA's March *World Agricultural Supply and Demand Estimates report*, total U.S. soybean exports are projected at 49.67 mmt in marketing year (MY) 2024/25, up from 46.13 mmt in MY 2023/24. Brazil is projected to export 105.50 mmt in MY 2024/25, up from 104.17 mmt in MY 2023/24. For more on soybean transportation in Brazil, see USDA's quarterly *Brazil Soybean Transportation report*.

Surajudeen.Olowlayemo@usda.gov

Table 1. Quarterly costs of transporting soybeans from United States and Brazil to Shanghai, China

Route	Cost	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.
		Minneapolis, MN					Davenport, IA				
		--$/mt--					--$/mt--				
United States via U.S. Gulf	Truck	16.75	17.67	17.87	6.69	1.13	16.75	17.67	17.87	6.69	1.13
	Rail	-	-	-	-	-	-	-	-	-	-
	Barge	38.76	39.70	48.92	26.21	23.22	31.78	32.08	39.00	22.72	21.57
	Ocean	58.23	56.72	48.39	-16.90	-14.69	58.23	56.72	48.39	-16.90	-14.69
	Total transportation	113.74	114.09	115.18	1.27	0.96	106.76	106.47	105.26	-1.41	-1.14
	Farm value	467.87	377.85	356.54	-23.80	-5.64	475.22	383.36	359.35	-24.38	-6.26
	Landed cost	581.61	491.94	471.72	-18.89	-4.11	581.98	489.83	464.61	-20.17	-5.15
	Transport % of landed cost	19.56	23.19	24.42	4.86	1.23	18.34	21.74	22.66	4.31	0.92
Route	Cost	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.
		Fargo, ND					Sioux Falls, SD				
		--$/mt--					--$/mt--				
United States via PNW	Truck	16.75	17.67	17.87	6.69	1.13	16.75	17.67	17.87	6.69	1.13
	Rail	67.27	63.52	61.87	-8.03	-2.60	68.85	64.77	63.05	-8.42	-2.66
	Ocean	30.18	30.23	28.34	-6.10	-6.25	30.18	30.23	28.34	-6.10	-6.25
	Total transportation	114.20	111.42	108.08	-5.36	-3.00	115.78	112.67	109.26	-5.63	-3.03
	Farm value	455.62	362.78	347.47	-23.74	-4.22	466.64	369.76	350.78	-24.83	-5.13
	Landed cost	569.82	474.20	455.55	-20.05	-3.93	582.42	482.43	460.04	-21.01	-4.64
	Transport % of landed cost	20.04	23.50	23.73	3.68	0.23	19.88	23.35	23.75	3.87	0.40
Route	Cost	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.
		North MT - Santos					South GO - Paranagua				
		--$/mt--					--$/mt--				
Brazil	Truck	103.06	82.31	70.75	-31.35	-14.04	67.69	48.80	41.56	-38.60	-14.84
	Ocean	35.00	36.00	34.40	-1.71	-4.44	35.50	37.50	35.80	0.85	-4.53
	Total transportation	138.06	118.31	105.15	-23.84	-11.12	103.19	86.30	77.36	-25.03	-10.36
	Farm Value	406.91	366.60	386.58	-5.00	5.45	406.12	360.62	363.97	-10.38	0.93
	Landed Cost	544.97	484.91	491.73	-9.77	1.41	509.31	446.92	441.33	-13.35	-1.25
	Transport % of landed cost	25.33	24.40	21.38	-3.95	-3.01	20.26	19.31	17.53	-2.73	-1.78

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Second quarter rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation costs plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton;
"-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Source: USDA, Agricultural Marketing Service.

Table 2. Quarterly costs of transporting soybeans from United States and Brazil to Hamburg, Germany

Route	Cost	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change		2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--$/mt--					--$/mt--				
United States via U.S. Gulf	Truck	16.75	17.67	17.87	6.69	1.13	16.75	17.67	17.87	6.69	1.13
	Rail	-	-	-	-	-	-	-	-	-	-
	Barge	38.76	39.70	48.92	26.21	23.22	31.78	32.08	39.00	22.72	21.57
	Ocean	29.54	26.41	23.64	-19.97	-10.49	29.54	26.41	23.64	-19.97	-10.49
	Total transportation	85.05	83.78	90.43	6.33	7.94	78.07	76.16	80.51	3.13	5.71
	Farm value	467.87	377.85	356.54	-23.80	-5.64	475.22	383.36	359.35	-24.38	-6.26
	Landed cost	552.92	461.63	446.97	-19.16	-3.18	553.29	459.52	439.86	-20.50	-4.28
	Transport % of landed cost	15.38	18.15	20.23	4.85	2.08	14.11	16.57	18.30	4.19	1.73
Route	Cost	2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change		2023 4th qtr.	2024 3rd qtr.	2024 4th qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--$/mt--					--$/mt--				
Brazil	Truck	103.06	82.31	70.75	-31.35	-14.04	61.54	48.80	41.56	-32.47	-14.84
	Ocean	33.00	33.80	32.20	-2.42	-4.73	32.10	33.50	32.10	0.00	-4.18
	Total transportation	136.06	116.11	102.95	-24.33	-11.33	93.64	82.30	73.66	-21.34	-10.50
	Farm Value	406.91	366.60	386.58	-5.00	5.45	406.12	360.62	363.97	-10.38	0.93
	Landed Cost	542.97	482.71	489.53	-9.84	1.41	499.76	442.92	437.63	-12.43	-1.19
	Transport % of landed cost	25.06	24.05	21.03	-4.03	-3.02	18.74	18.58	16.83	-1.91	-1.75

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Second quarter rates were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation cost plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Source: USDA, Agricultural Marketing Service.

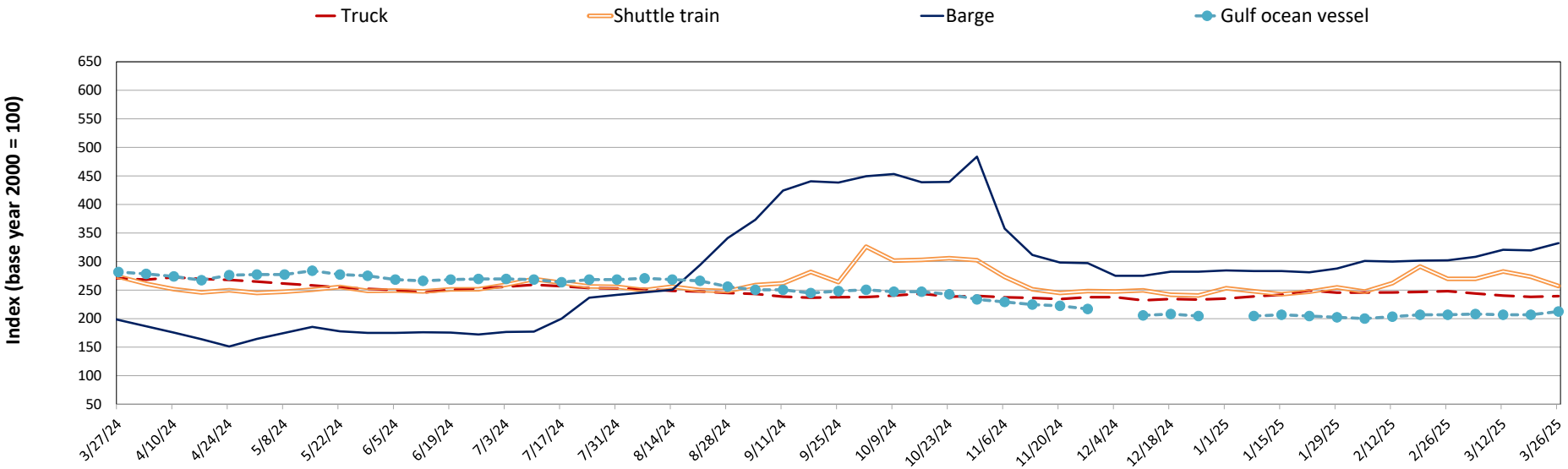
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
03/26/25	239	336	257	332	212	195
03/19/25	238	374	273	319	207	191
03/27/24	271	351	274	198	282	239

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.

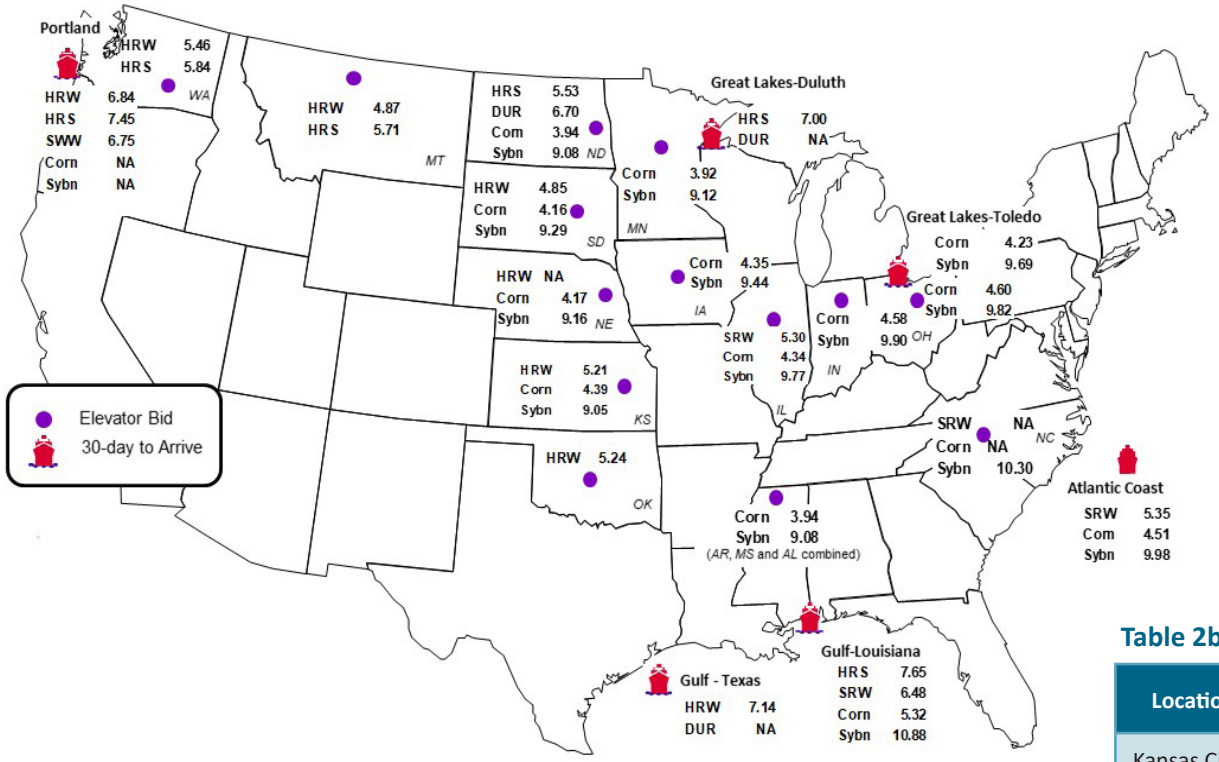
Figure 1. Grain transportation cost indicators as of week ending 3/26/25



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	3/21/2025	3/14/2025
Corn	IL–Gulf	-0.98	-1.01
Corn	NE–Gulf	-1.15	-1.17
Soybean	IA–Gulf	-1.44	-1.44
HRW	KS–Gulf	-1.93	-1.97
HRS	ND–Portland	-1.92	-2.08

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	3/21/2025	Week ago 3/14/2025	Year ago 3/22/2024
Kansas City	Wheat	May	5.780	6.024	5.984
Minneapolis	Wheat	May	6.050	6.016	6.610
Chicago	Wheat	May	5.476	5.690	5.620
Chicago	Corn	May	4.634	4.640	4.390
Chicago	Soybean	May	10.076	10.174	12.040

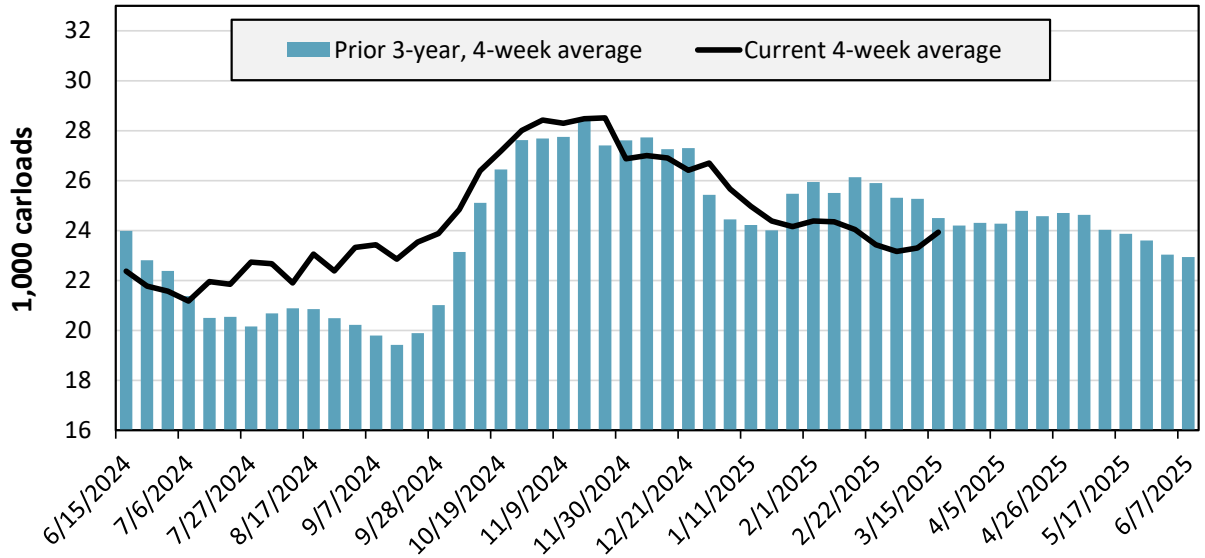
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 3/15/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,524	2,644	11,260	5,752	3,310	1,188	25,678
This week last year	1,502	2,077	11,989	5,540	2,807	739	24,654
2025 YTD	19,159	31,572	114,318	60,348	26,485	14,486	266,368
2024 YTD	18,825	30,122	116,753	56,493	32,947	12,360	267,500
2025 YTD as % of 2024 YTD	102	105	98	107	80	117	100
Last 4 weeks as % of 2024	101	107	90	112	87	125	98
Last 4 weeks as % of 3-yr. avg.	87	105	97	101	97	90	98
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 most recent 4 weeks of data to the analogous 4 weeks from the prior year and to the analogous 4 weeks in 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 15, grain carloads were up 3 percent from the previous week, down 2 percent from last year, and down 2 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: 3/14/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	28.5	26.7	19.3	20.2	7.0	29.0	19.8	21.5
	Average over last 4 weeks	26.7	32.9	56.7	19.6	11.8	41.5	19.1	29.8
	Average of same 4 weeks last year	28.2	39.1	32.9	18.1	8.4	17.7	15.8	22.9
Grain unit train speeds (miles per hour)	This week	22.3	19.8	24.1	21.1	24.2	21.4	24.0	22.4
	Average over last 4 weeks	21.8	18.8	24.2	21.5	22.3	20.8	23.9	21.9
	Average of same 4 weeks last year	23.1	16.9	24.4	22.3	25.3	22.8	26.9	23.1

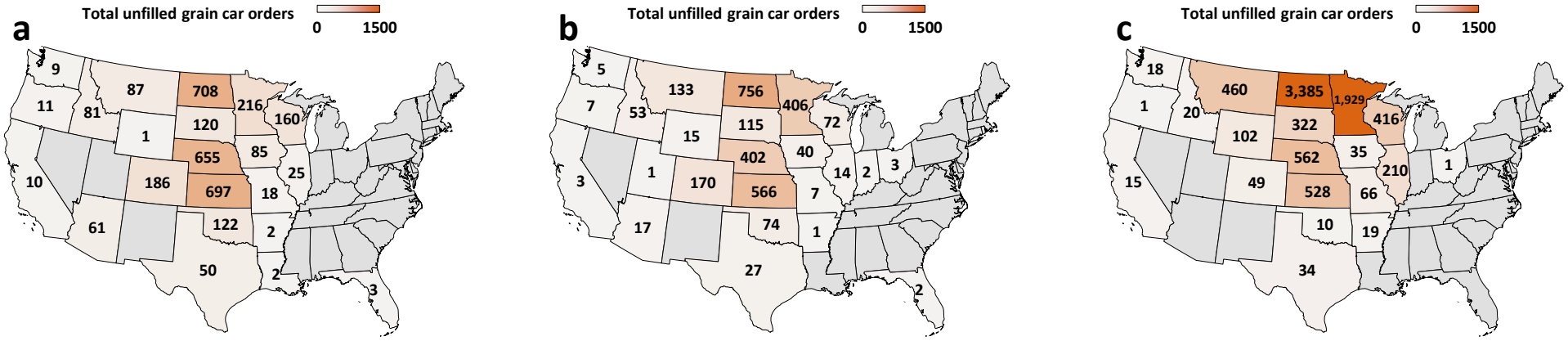
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 3/14/2025		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	72	3	300	82	13	48	6	525
	Average over last 4 weeks	81	6	776	89	15	44	29	1,040
	Average of same 4 weeks last year	28	7	634	98	5	44	32	848
Loaded grain cars not moved in over 48 hours (number)	This week	113	153	323	68	6	145	1	809
	Average over last 4 weeks	97	225	1,280	84	11	267	4	1,967
	Average of same 4 weeks last year	36	355	1,055	86	4	70	28	1,633
Grain unit trains held (number)	This week	1	0	23	12	1	2	1	41
	Average over last 4 weeks	1	0	36	11	1	3	2	53
	Average of same 4 weeks last year	1	5	24	6	0	3	6	43
Unfilled manifest grain car orders (number)	This week	3	0	850	1,869	0	587	0	3,309
	Average over last 4 weeks	8	1	997	1,285	0	599	0	2,890
	Average of same 4 weeks last year	1	0	6,562	647	0	971	65	8,246

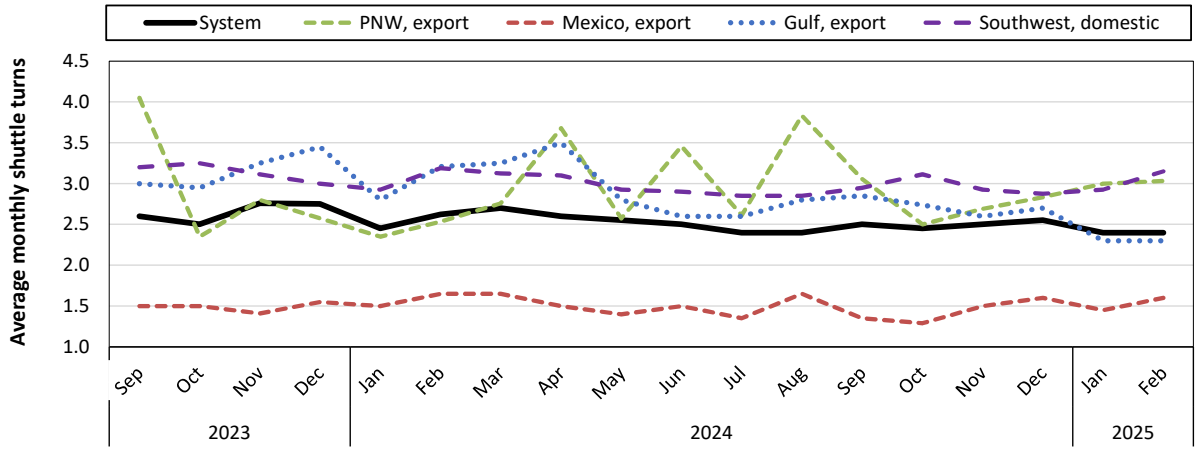
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 3/14/2025 (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

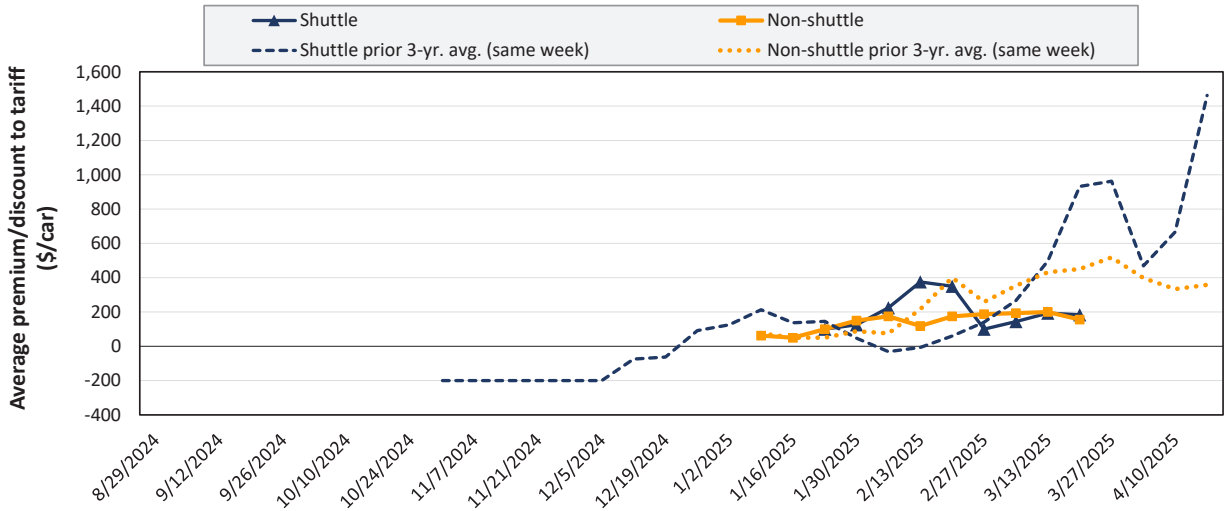


Average monthly systemwide grain shuttle turns for February 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.03 to PNW, 1.6 to Mexico, 2.3 to the Gulf, and 3.15 to the Southwest.

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 April 2025



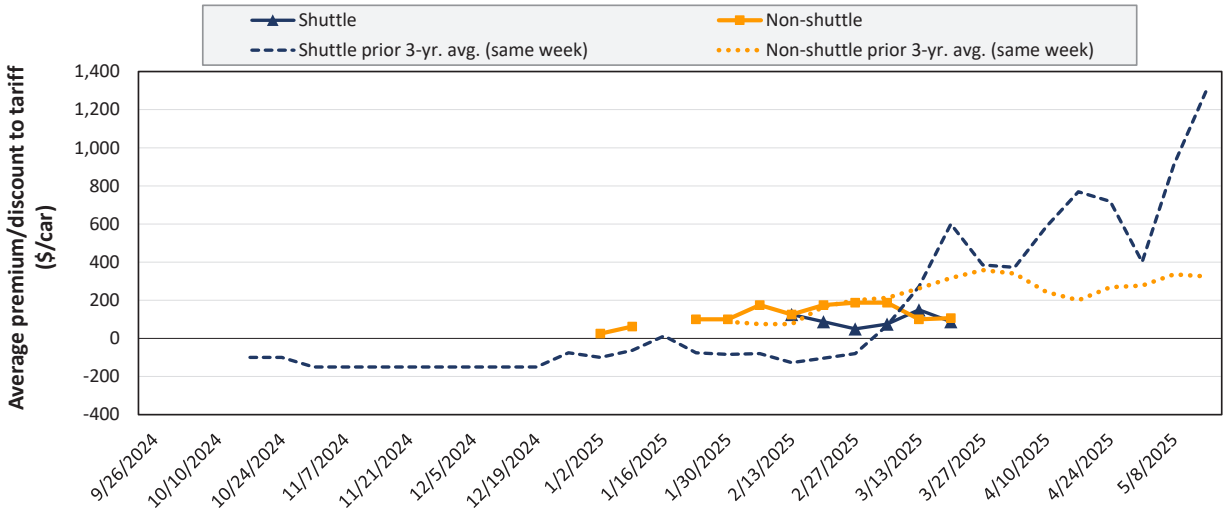
Average non-shuttle bids/offers fell $44 this week, and are $44 below the peak.

Average shuttle bids/offers fell $9 this week and are $191 below the peak.

3/20/2025	BNSF	UP
Non-Shuttle	$175	$138
Shuttle	$381	-$13

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 May 2025



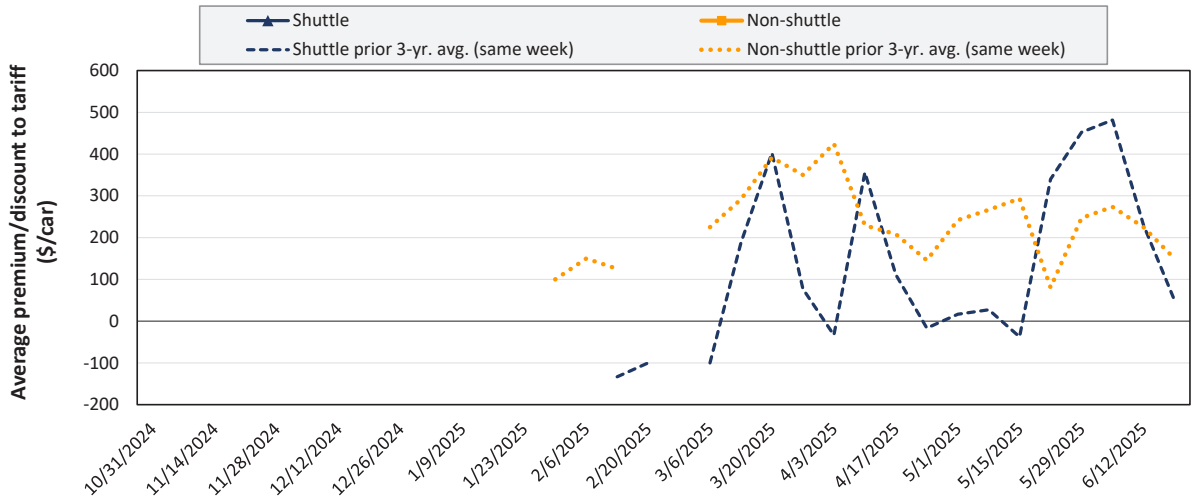
Average non-shuttle bids/offers rose $6 this week, and are $81 below the peak.

Average shuttle bids/offers fell $63 this week and are $63 below the peak.

3/20/2025	BNSF	UP
Non-Shuttle	$125	$88
Shuttle	$175	$0

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 June 2025



There were no non-shuttle bids/offers this week.

There were no shuttle bids/offers this week.

3/20/2025	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	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: 3/20/2025		Delivery period					
		Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25
Non-shuttle	BNSF	500	175	125	n/a	n/a	n/a
	Change from last week	-350	-75	25	n/a	n/a	n/a
	Change from same week 2024	n/a	-425	-300	n/a	n/a	n/a
	UP	n/a	138	88	n/a	n/a	n/a
	Change from last week	n/a	-13	-13	n/a	n/a	n/a
	Change from same week 2024	n/a	-450	-338	n/a	n/a	n/a
Shuttle	BNSF	825	381	175	n/a	n/a	n/a
	Change from last week	-150	-32	25	n/a	n/a	n/a
	Change from same week 2024	-675	-481	-25	n/a	n/a	n/a
	UP	363	-13	0	n/a	n/a	n/a
	Change from last week	203	13	n/a	n/a	n/a	n/a
	Change from same week 2024	363	-413	-200	n/a	n/a	n/a
	CPKC	500	0	n/a	-200	n/a	n/a
	Change from last week	-250	0	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-300	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

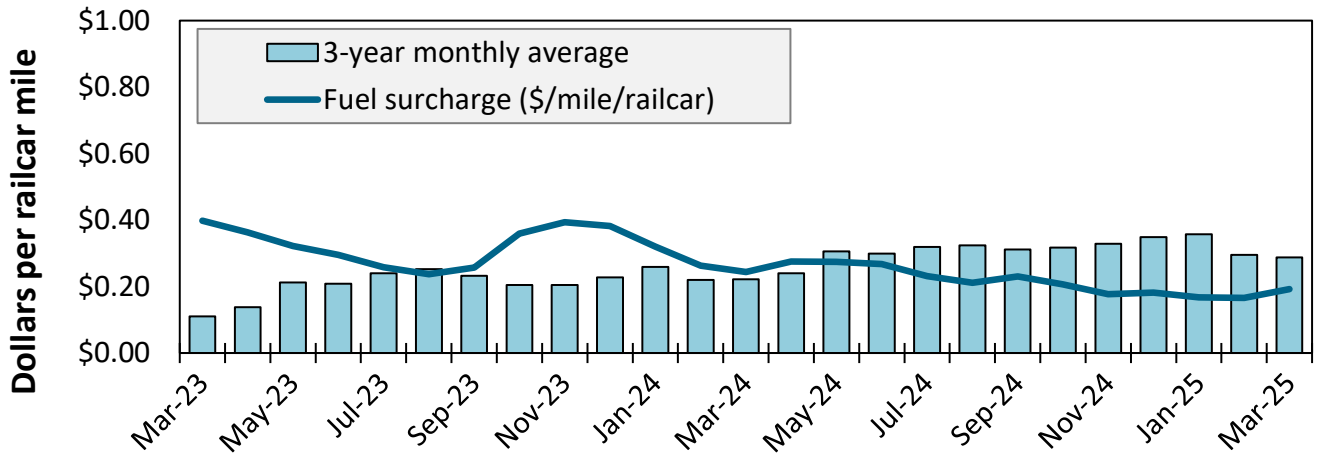
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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).

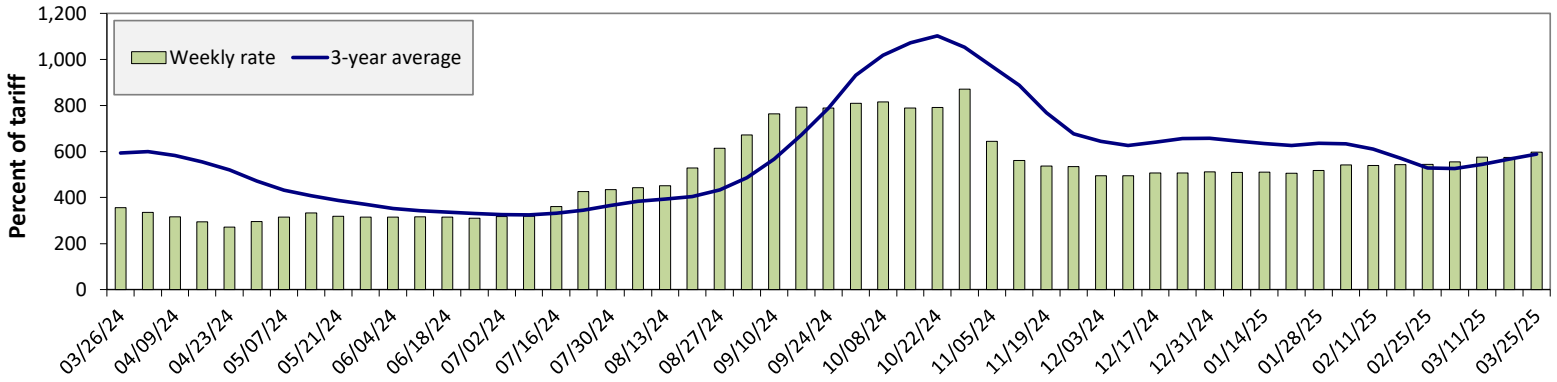
Figure 9. Railroad fuel surcharges, North American weighted average



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 25: 4 percent higher than the previous week; 68 percent higher than last year; and 1 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

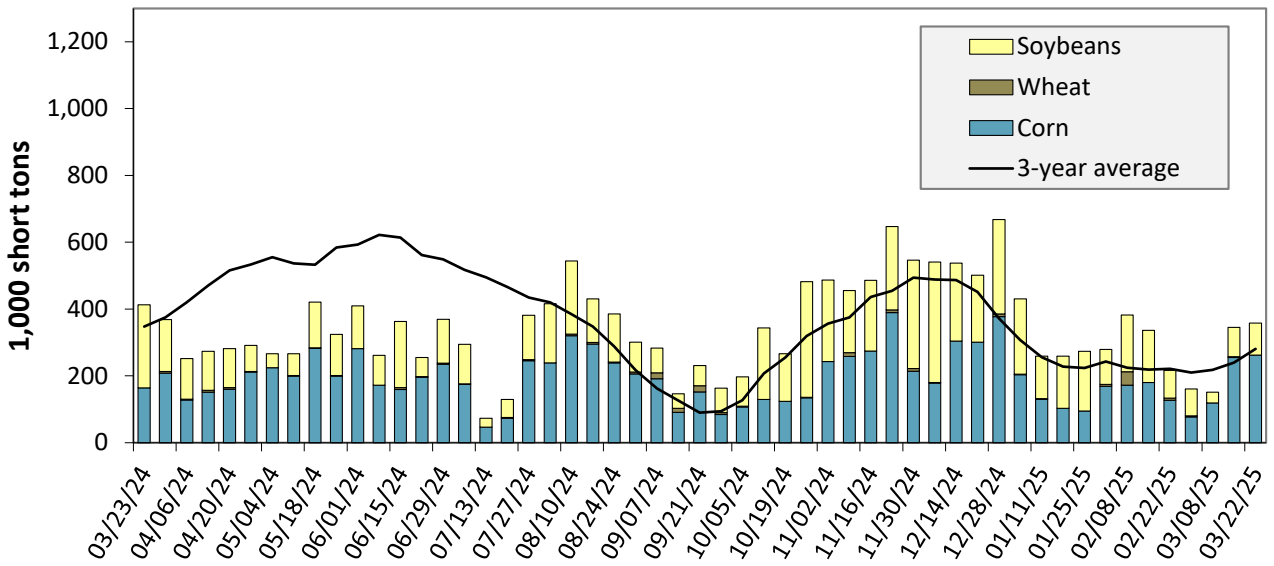
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	3/25/2025	606	592	598	452	433	365
	3/18/2025	n/a	566	575	443	429	349
$/ton	3/25/2025	37.51	31.49	27.75	18.03	20.31	11.46
	3/18/2025	n/a	30.11	26.68	17.68	20.12	10.96
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	54	60	68	74	39	56
	3-year avg.	-1	-2	1	-6	-21	-12
Rate	April	523	491	481	368	370	311
	June	454	412	396	315	315	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 22: 13 percent lower than last year and 27 percent higher than the 3-year average.

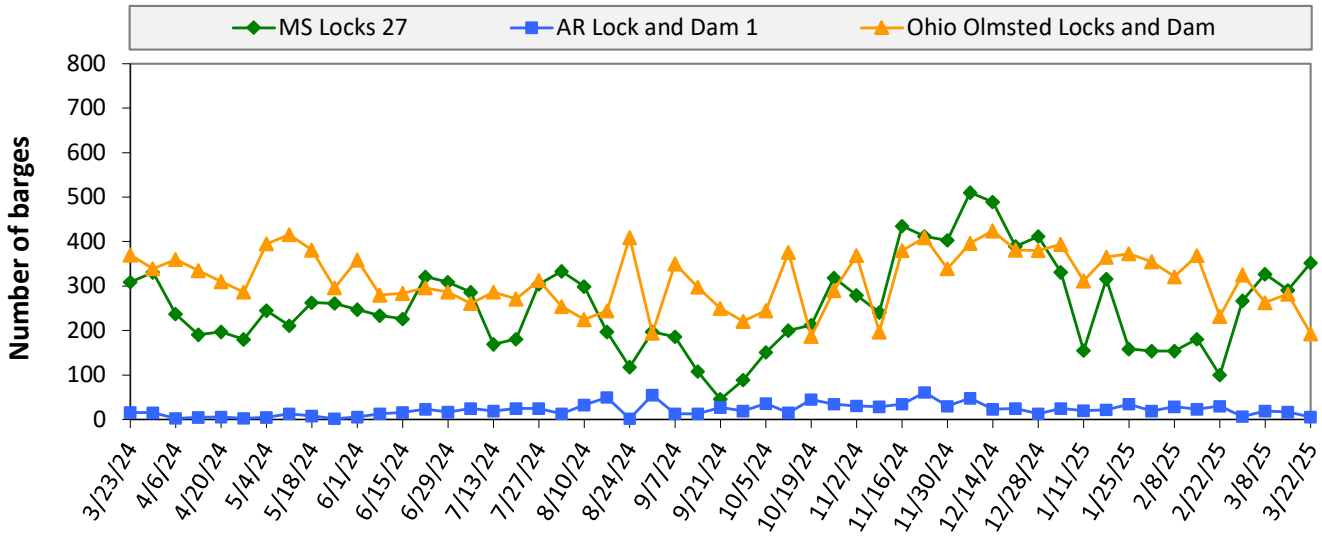
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 03/22/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	13	0	5	0	17
Mississippi River (Winfield, MO (L25))	111	0	37	0	148
Mississippi River (Alton, IL (L26))	263	0	94	0	357
Mississippi River (Granite City, IL (L27))	262	0	96	0	358
Illinois River (La Grange)	114	0	43	0	157
Ohio River (Olmsted)	139	7	116	12	274
Arkansas River (L1)	1	18	18	0	38
Weekly total - 2025	402	25	231	12	670
Weekly total - 2024	414	73	347	11	844
2025 YTD	3,666	227	2,814	64	6,770
2024 YTD	2,661	371	3,357	66	6,454
2025 as % of 2024 YTD	138	61	84	97	105
Last 4 weeks as % of 2024	117	51	77	162	95
Total 2024	15,251	1,564	12,598	214	29,626

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

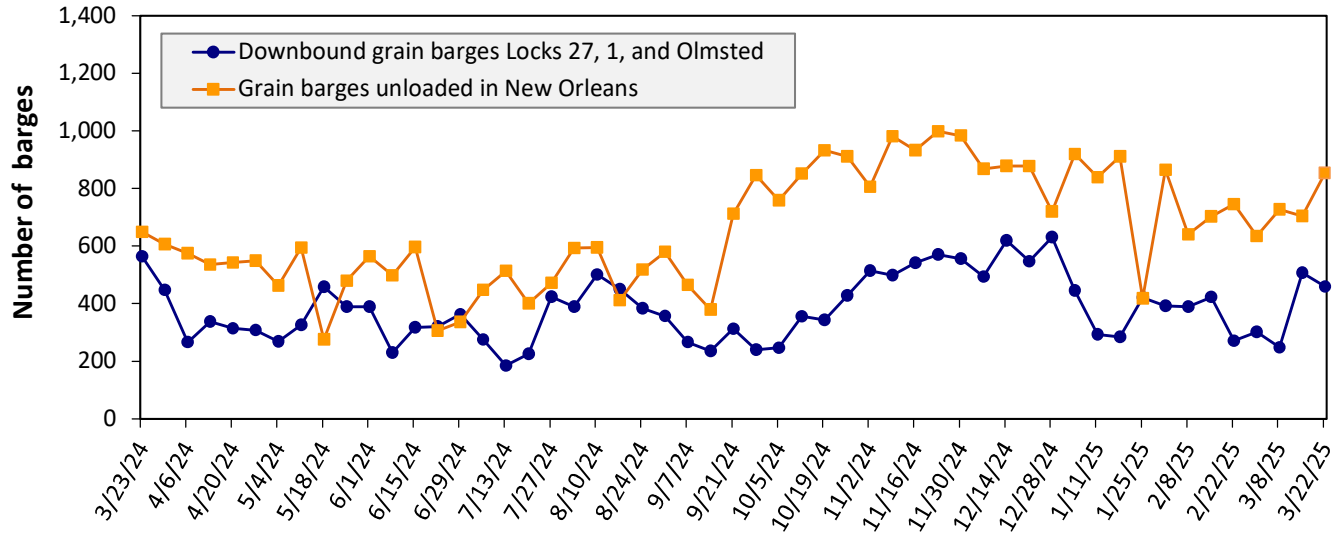
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending March 22: 551 barges transited the locks, 39 barges fewer than the previous week, and 19 percent higher than the 3-year average.

Source: U.S. Army Corps of Engineers.

Figure 14. Grain barges for export in New Orleans region



For the week ending March 22: 459 barges moved down river, 48 fewer than the previous week; 853 grain barges unloaded in the New Orleans Region, 21 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam.
Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		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.

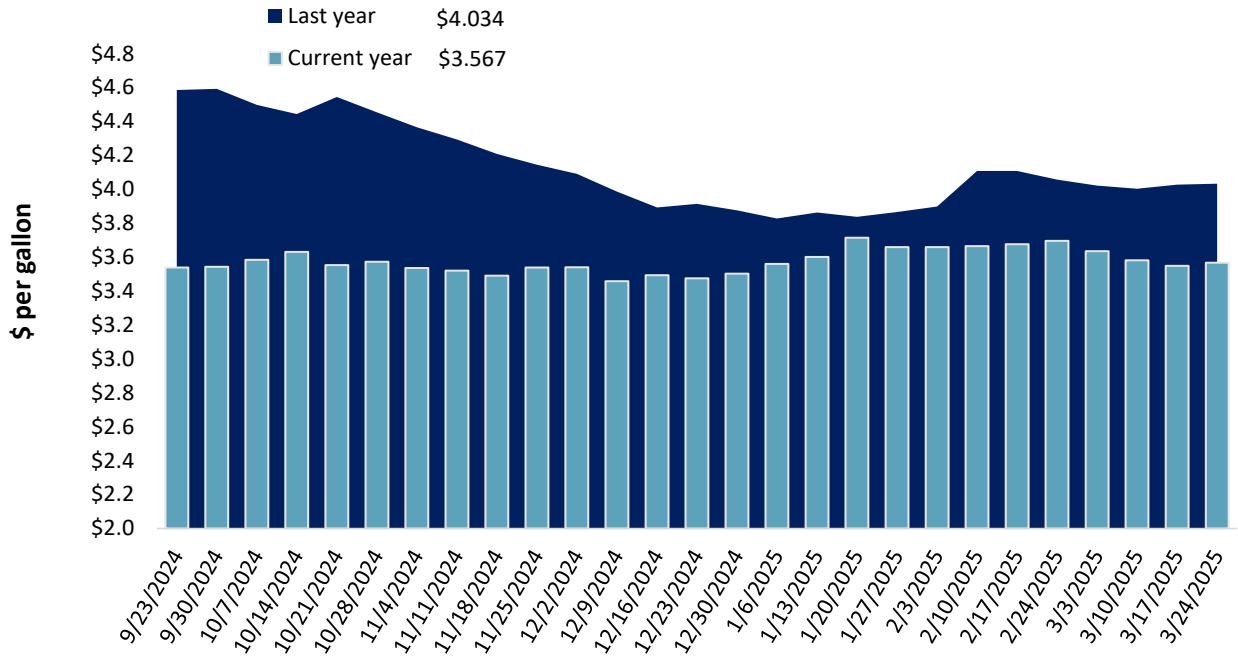
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 3/24/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.675	-0.004	-0.450
	New England	3.987	0.000	-0.334
	Central Atlantic	3.872	0.003	-0.422
	Lower Atlantic	3.569	-0.008	-0.473
II	Midwest	3.491	0.028	-0.495
III	Gulf Coast	3.265	0.020	-0.452
IV	Rocky Mountain	3.415	0.039	-0.571
V	West Coast	4.229	0.026	-0.437
	West Coast less California	3.754	0.039	-0.419
	California	4.776	0.010	-0.448
Total	United States	3.567	0.018	-0.467

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 24, the U.S. average diesel fuel price increased 1.8 cents from the previous week to $3.567 per gallon, 46.7 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 3/13/2025	1,360	731	1,467	1,332	66	4,956	20,653	6,288	31,897
	This week year ago	971	1,346	1,543	850	71	4,781	17,553	4,665	26,999
	Last 4 wks. as % of same period 2023/24	136	64	106	154	103	111	120	157	124
Current shipped (cumulative) exports sales	2024/25 YTD	3,757	2,369	5,125	4,356	272	15,878	31,378	39,134	86,390
	2023/24 YTD	2,516	2,944	4,736	3,005	411	13,611	24,144	35,426	73,181
	YTD 2024/25 as % of 2023/24	149	80	108	145	66	117	130	110	118
	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 3/13/2025	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	18,595	17,760	5	17,746
Japan	8,435	7,215	17	9,366
China	33	1,914	-98	8,233
Colombia	5,172	4,144	25	4,383
Korea	3,364	1,353	149	1,565
Top 5 importers	35,598	32,384	10	41,293
Total U.S. corn export sales	52,031	41,697	25	51,170
% of YTD current month's export projection	84%	72%	-	-
Change from prior week	1,497	1,186	-	-
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 3/13/2025	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	21,634	22,954	-6	28,636
Mexico	3,867	4,106	-6	4,917
Japan	1,525	1,737	-12	2,231
Egypt	2,548	482	428	2,228
Indonesia	1,292	1,387	-7	1,910
Top 5 importers	30,866	30,665	1	39,922
Total U.S. soybean export sales	45,422	40,091	13	51,302
% of YTD current month's export projection	91%	87%	-	-
Change from prior week	353	494	-	-
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 3/13/2025	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	3,910	3,140	25	3,298
Philippines	2,578	2,737	-6	2,494
Japan	2,010	1,914	5	2,125
China	139	2,089	-93	1,374
Korea	2,364	1,334	77	1,274
Taiwan	957	997	-4	921
Nigeria	582	243	140	920
Thailand	863	453	90	552
Colombia	411	293	40	522
Vietnam	567	423	34	313
Top 10 importers	14,381	13,622	6	13,792
Total U.S. wheat export sales	20,834	18,392	13	18,323
% of YTD current month's export projection	92%	96%	-	-
Change from prior week	-249	-110	-	-
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.

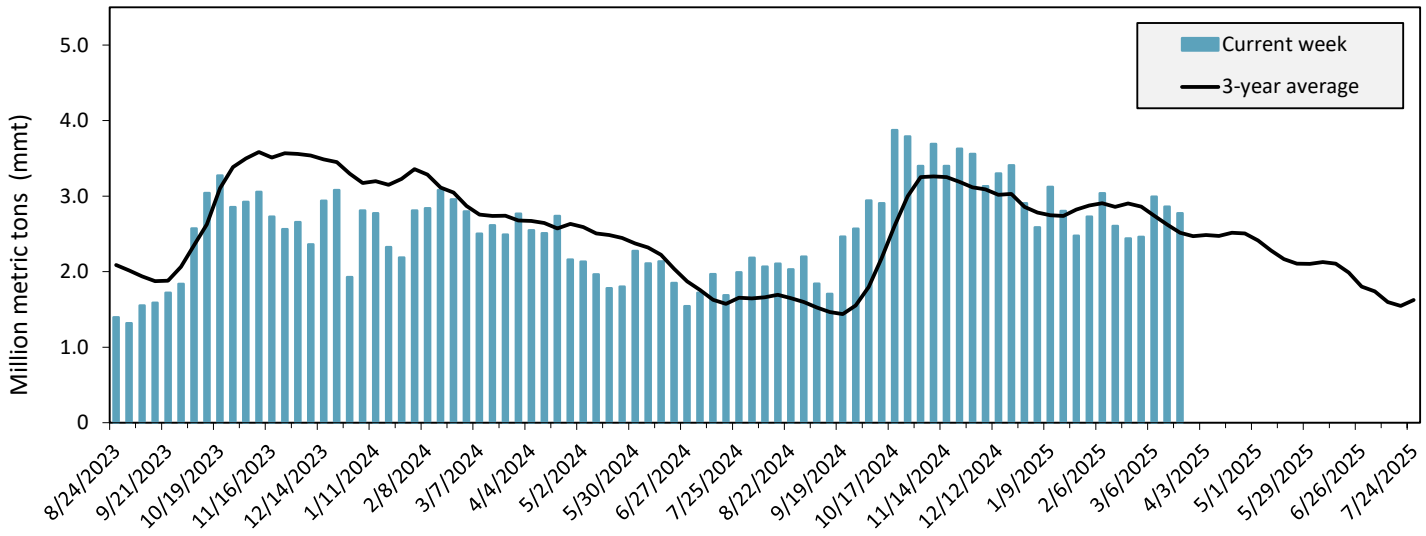
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 03/20/2025	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	457	607	75	5,233	3,524	148	119	203	13,987
	Soybeans	133	0	n/a	1,451	2,379	61	64	87	10,445
	Wheat	195	365	53	2,269	2,118	107	131	118	11,453
	All grain	785	972	81	9,022	8,547	106	107	135	37,186
Mississippi Gulf	Corn	721	854	84	8,220	5,313	155	148	109	27,407
	Soybeans	561	519	108	6,852	8,182	84	92	117	29,741
	Wheat	129	26	505	679	1,220	56	42	60	4,523
	All grain	1,411	1,399	101	15,750	14,771	107	111	109	61,789
Texas Gulf	Corn	0	3	0	95	110	86	120	181	570
	Soybeans	20	0	n/a	106	0	n/a	n/a	-	741
	Wheat	109	53	206	587	337	174	152	155	1,940
	All grain	129	56	230	868	1,511	57	74	75	6,965
Interior	Corn	278	204	136	2,493	2,785	90	98	116	13,463
	Soybeans	103	135	77	1,442	1,936	74	83	87	8,059
	Wheat	51	52	99	607	629	97	102	111	2,952
	All grain	435	407	107	4,592	5,426	85	93	105	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	7	24	31	89	104	85	105	187	410
	Soybeans	5	4	135	410	398	103	113	10	1,272
	Wheat	0	0	n/a	0	5	0	n/a	n/a	73
	All grain	12	27	44	499	506	98	107	28	1,754
All Regions	Corn	1,463	1,692	86	16,130	11,836	136	127	131	56,109
	Soybeans	822	658	125	10,365	12,947	80	87	101	50,865
	Wheat	485	495	98	4,164	4,339	96	98	106	21,594
	All grain	2,773	2,862	97	30,858	30,845	100	105	111	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. A "-" in the table indicates a percentage change with a near-zero denominator for the period.
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.

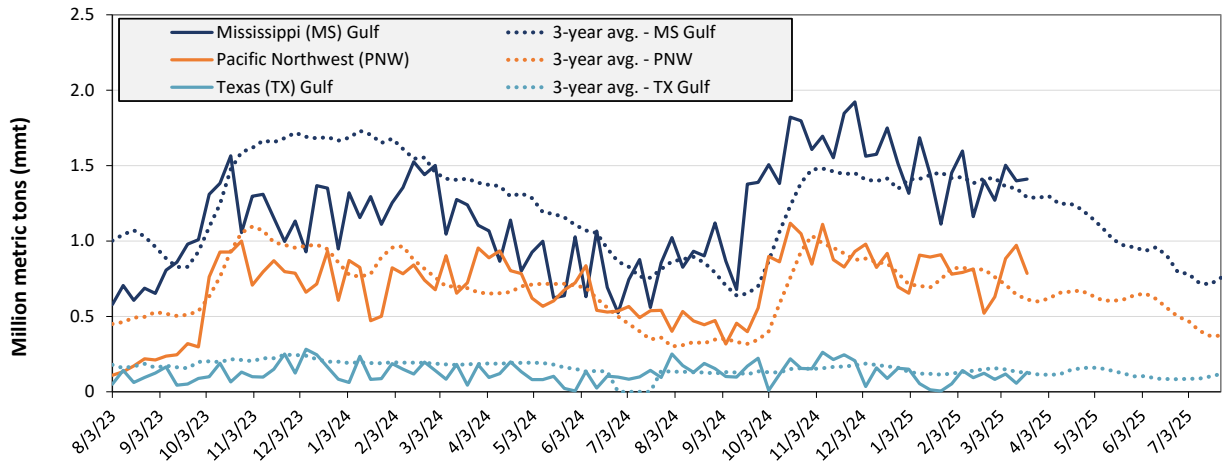
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Mar. 20: 2.8 mmt of grain inspected, down 3 percent from the previous week, up 16 percent from the same week last year, and up 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 03/20/25 inspections (mmt):
MS Gulf: 1.41
PNW: 0.79
TX Gulf: 0.13

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	un-changed	up 130	up 6	down 19
Last year (same 7 days)	up 26	up 108	up 30	up 6
3-year average (4-week moving average)	up 9	up 3	up 9	up 28

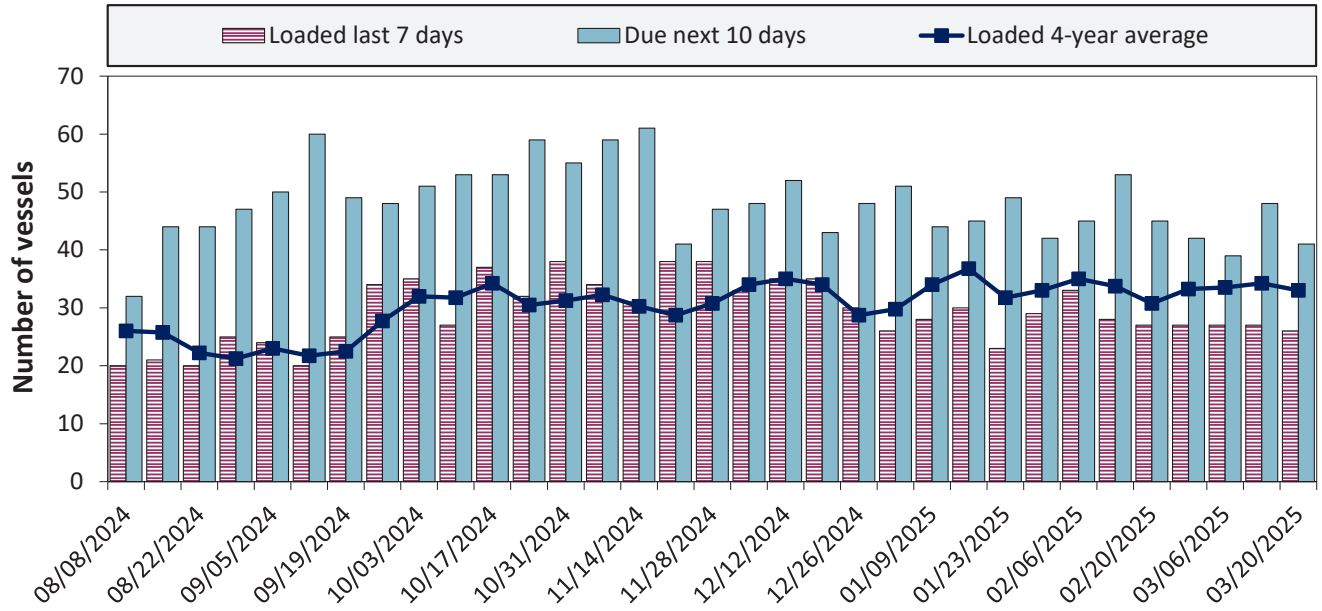
Source: USDA, Federal Grain Inspection Service.

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
3/20/2025	36	26	41	23
3/13/2025	37	27	48	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.

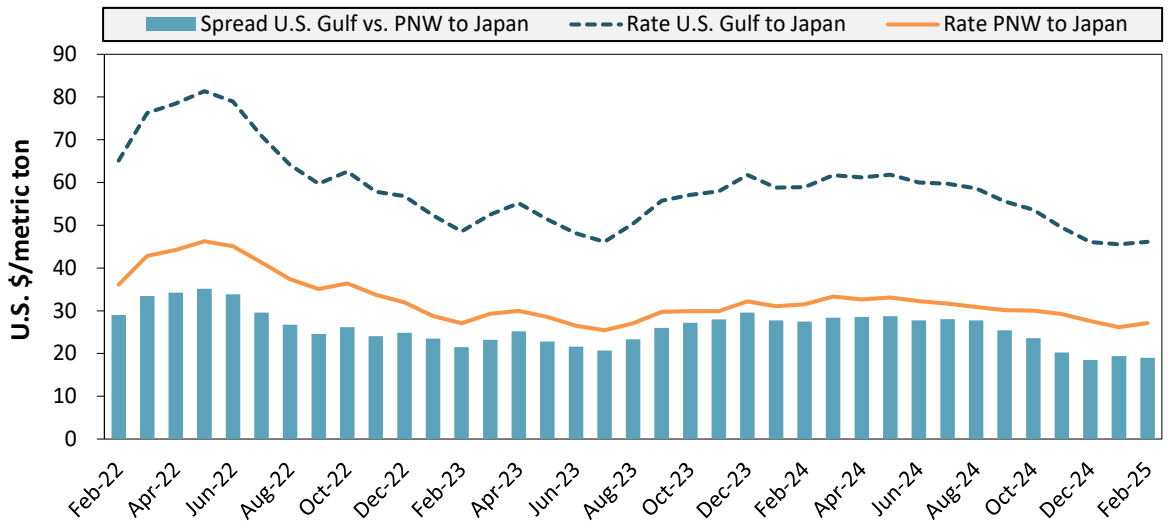
Figure 19. U.S. Gulf vessel loading activity



Week ending 03/20/25, number of vessels	Loaded	Due
Change from last year	-24%	-5%
Change from 4-year average	-21%	-11%

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

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



Ocean rates	U.S. Gulf	PNW	Spread
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.

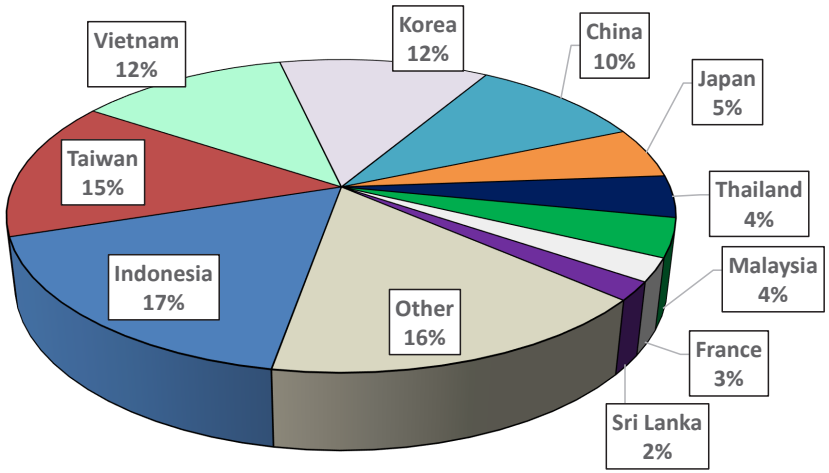
Table 20. Ocean freight rates for selected shipments, week ending 3/22/2025

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Mar 13, 2025	May 1/10, 2025	49,000	50.50
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	Colombia	Wheat	Feb 25, 2025	Mar 15/25, 2005	33,400	89.01
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	Japan	Heavy grain	Mar 18, 2025	Apr 1/10, 2025	60,000	37.50
PNW	Japan	Wheat & Corn	Feb 25, 2025	Mar 1/20, 2025	35,000	32.85
Brazil	China	Heavy grain	Mar 21, 2025	Apr 20/29, 2025	63,000	35.00
Brazil	China	Heavy grain	Mar 13, 2025	May 1/31, 2025	63,000	35.00
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	Mar 20, 2025	Apr 10/20, 2025	63,000	34.00
Brazil	N. China	Heavy grain	Jan 23, 2025	Feb 25/Mar 5, 2025	63,000	30.50
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.

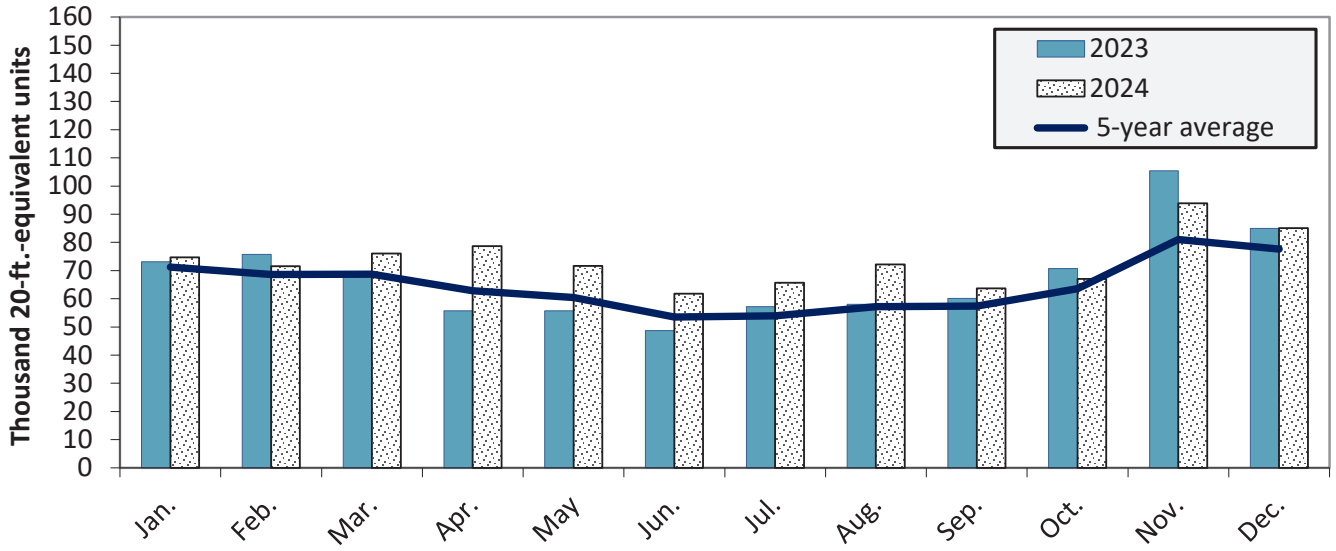
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Title	Name	Email	Phone
Coordinators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Maria Williams	maria.williams@usda.gov	(202) 690-4430
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Grain Transportation Indicators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
Rail Transportation	Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690-1144
	Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690-3244
	Rich Henderson	richard.henderson2@usda.gov	(919) 855-7801
	Austin Hunt	austin.hunt@usda.gov	(540) 681-2596
Barge Transportation	Rich Henderson	richard.henderson2@usda.gov	(919) 855-7801
Truck Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
Grain Exports	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Ocean Transportation	Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Jesse Gastelle (Container movements)	jesse.gastelle@usda.gov	(202) 690-1144
Editor	Maria Williams	maria.williams@usda.gov	(202) 690-4430

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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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