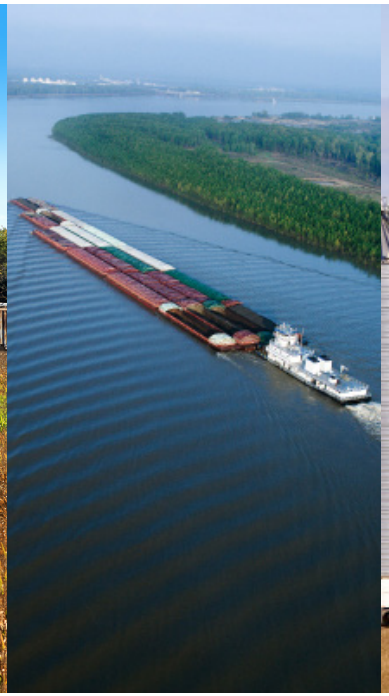
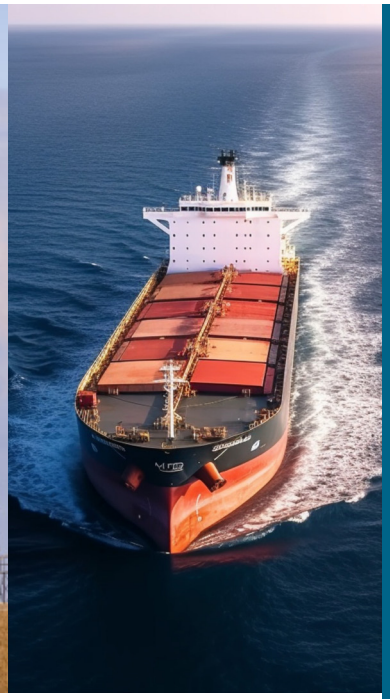
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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STB Releases 2023 Public-Use Carload Waybill Sample. The Surface Transportation Board (STB) recently posted the 2023 Public-Use Carload Waybill Sample (CWS) on its website. Derived from over 2.1 million waybills, STB's CWS is among the most comprehensive sources for understanding freight rail movements and trends.

In 2023, U.S. railroads originated 80.6 million tons (mt) of corn, 26.3 mt of soybeans, and 25.9 mt of wheat. Soybean and wheat carloads were down from 2022, but corn carloads, up 3 percent from 2022, were the highest since 2006. Still, corn flows into Pacific Northwest export terminals were down from 2022, as corn was diverted from exports and, instead, shipped to the Southern Plains following severe drought (*Grain Transportation Report, August 31, 2023, third highlight*).

Via an easy to-use, accessible format, USDA's AgTransport gives its users access to the 2005-23 data of the public-use CWS.

Low Cattle Placements in Texas Feedlots Signal Weak Grain Shipping Demand. According to the latest *Cattle on Feed* report from USDA's National Agricultural Statistics Service, cattle placements in U.S. feedlots during February totaled 1.55 million head—18 percent below last year and the lowest monthly placements since April 2020. At 260,000 head, cattle placements in February were down 27 percent from last year in Texas. The Texas Panhandle, where most of the State's feedlots are located, is a leading destination for rail corn carloads.

Low placements in Texas reflected USDA's decision to halt imports of Mexican cattle, beginning in November 2024, to prevent the spread of New World screwworm. Despite the renewal of Mexican cattle imports in February, lower cattle placements in previous months may reduce the demand for Texas Panhandle-destined grain transportation for the next several months.

According to the Surface Transportation Board's 2023 CWS (available on AgTransport), the "Amarillo, TX-NM" Bureau of Economic Analysis (BEA) area (which includes much of the Texas Panhandle) received 6.7 million tons of corn by rail—more than any other BEA area.

U.S. Grains Council Releases Annual Report on Corn Export Cargo Quality. The U.S. Grains Council (USGC) recently released its *2024/2025 Corn Export Cargo Quality Report* (CECQR). When compared against USGC's *2024/2025 Corn Harvest Quality Report*, CECQR findings can reveal changes in corn quality during the marketing process—of which transportation is a key component.

CECQR is based on 425 export corn-cargo samples inspected by USDA's Federal Grain Inspection Service. Corn samples were evaluated for grade factors (e.g., test weight, heat damage, etc.); intrinsic quality characteristics (e.g., protein, starch, and oil content); physical quality characteristics (e.g., stress cracks); and sanitary quality characteristics (e.g., mycotoxins).

The results are presented for the whole United States, as well as for the three major export catchment areas: U.S. Gulf, Pacific Northwest, and Southern Rail (i.e., rail exports to Mexico from inland sources). Because of lack of aeration during transport, grain shipments are vulnerable to moisture variation, which can lead to fungal invasions or pest infestations.

NASS To Reinstate County Data for Grains. On March 19, USDA's National Agricultural Statistical Service (NASS) announced it is reinstating critical county-level data for crops after discontinuing the data last year. These data are useful in determining demand for grain transportation.

The reinstated data cover the 2024 crop season for the row crops (corn, cotton, peanuts, rice, sorghum, soybeans) and the 2025 crop season for the small grain crops (barley, oats, wheat). Scheduled for release on May 6, data for corn and soybeans include statistics on acreage, yield and production.

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 20, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 30.37 million metric tons (mmt), down 5 percent from last week and up 15 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.04 mmt, down 31 percent from last week. Net **soybean export sales** were 0.34 mmt, down 4 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.10 mmt, up 140 percent from last week.

Rail

U.S. Class I railroads originated 26,013 **grain carloads** during the week ending March 22. This was a 1-percent increase from the previous week, 3 percent more than last year, and 5 percent more than the 3-year average.

Average April **shuttle secondary railcar bids/offers** (per car) were $209 above tariff for the week ending March 27. This was $25 more than last week and $128 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $125 above tariff. This was $31 less than last week and $438 lower than this week last year.

Barge

For the week ending March 29, **barged grain movements** totaled 685,986 tons. This was 2 percent more than the previous week and 4 percent more than the same period last year.

For the week ending March 29, 574 grain barges **moved down river**—115 more than last week. There were 715 grain barges **unloaded** in the New Orleans region, 16 percent fewer than last week.

Ocean

For the week ending March 27, 32 **oceangoing grain vessels** were loaded in the Gulf—10 percent more than the same period last year. Within the next 10 days (starting March 28), 37 vessels were expected to be loaded—18 percent fewer than the same period last year.

As of March 27, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $47.75, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $28.00 per mt, up 2 percent from the previous week.

Fuel

For the week ending March 31, the U.S. average **diesel price** increased 2.5 cents from the previous week, to $3.592 per gallon—40.4 cents below the same week last year.

Fourth-Quarter 2024 Wheat Landed Costs

From third to fourth quarter 2024 (quarter to quarter), the costs of shipping wheat to Japan from Kansas (KS) and North Dakota (ND) decreased—via both the Pacific Northwest (PNW routes) and U.S. Gulf (Gulf routes) (tables 1 and 2). From fourth quarter 2023 to fourth quarter 2024 (year to year), wheat shipping costs decreased for all routes, except the KS-PNW route. Wheat inspections destined to Japan were down year to year and slightly up quarter to quarter (USDA, Federal Grain Inspection Service (FGIS)).

Transportation Costs

PNW Routes. Fourth-quarter wheat transportation costs totaled $115/metric ton (mt), via the KS-PNW route, and $108/mt, via the ND-PNW route. Quarter to quarter, transportation costs were down 2 percent from Kansas and down 1 percent from North Dakota, reflecting lower ocean freight rates (and also lower rail rates for the KS-PNW route). Year to year, transportation costs rose 1 percent from Kansas and fell 5 percent from North Dakota. Fourth-quarter wheat transportation costs, as a share of landed costs, were 37 percent for the KS-PNW route and 34 percent for the ND-PNW route (table 1).

Gulf Routes. Fourth-quarter wheat transportation costs totaled $112/mt by the KS-Gulf route and $123/mt by the ND-Gulf route. Quarter to quarter, transportation costs

Table 1. Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through the PNW

Mode	Kansas					North Dakota				
	2023 4th qtr	2024 3rd qtr	2024 4th qtr	Year-to-year change	Quarterly change	2023 4th qtr	2024 3rd qtr	2024 4th qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	16.75	17.67	17.87	6.69	1.13	16.75	17.67	17.87	6.69	1.13
Rail	66.49	69.20	68.36	2.81	-1.21	66.31	60.71	61.05	-7.93	0.56
Ocean vessel	30.68	30.90	28.96	-5.61	-6.28	30.68	30.90	28.96	-5.61	-6.28
Transportation costs	113.92	117.77	115.19	1.11	-2.19	113.74	109.28	107.88	-5.15	-1.28
Farm value	231.49	195.23	196.33	-15.19	0.56	271.90	206.62	207.60	-23.65	0.47
Total landed cost	345.41	313.00	311.52	-9.81	-0.47	385.64	315.90	315.48	-18.19	-0.13
Transport % of landed cost	32.98	37.63	36.98	12.12	-1.73	29.49	34.59	34.20	15.94	-1.15

Table 2. Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through U.S. Gulf

Mode	Kansas					North Dakota				
	2023 4th qtr	2024 3rd qtr	2024 4th qtr	Year-to-year change	Quarterly change	2023 4th qtr	2024 3rd qtr	2024 4th qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	16.75	17.67	17.87	6.69	1.13	16.75	17.67	17.87	6.69	1.13
Rail	47.92	44.75	44.46	-7.22	-0.65	60.03	55.25	55.58	-7.41	0.60
Ocean vessel	58.94	57.99	49.70	-15.68	-14.30	58.94	57.99	49.70	-15.68	-14.30
Transportation costs	123.61	120.41	112.03	-9.37	-6.96	135.72	130.91	123.15	-9.26	-5.93
Farm value	231.49	195.23	196.33	-15.19	0.56	271.90	206.62	207.60	-23.65	0.47
Total landed cost	355.10	315.64	308.36	-13.16	-2.31	407.62	337.53	330.75	-18.86	-2.01
Transport % of landed cost	34.81	38.15	36.33	4.37	-4.76	33.30	38.78	37.23	11.83	-4.00

Note: Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car. The previous Kansas to PNW rail rate (via Union Pacific) was discontinued. The new rate is Kansas to PNW (via BNSF), which began June 2024. Earlier historical data for the quarter-to-quarter and year-to-year comparisons is not available. For comparison purposes, the base BNSF tariff rate in June 2024 was assumed to remain the same for third quarter 2023 and second quarter 2024. All quarters reflect changes in fuel surcharges. USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter). PNW = Pacific Northwest; qtr = quarter.
Source: USDA, Agricultural Marketing Service.

were down 7 percent from Kansas and down 6 percent from North Dakota, primarily because of falling ocean freight rates. Year to year, costs through the Gulf decreased 9 percent each from Kansas and North Dakota. Fourth-quarter wheat transportation costs, as a share of landed costs, were 36 percent for the KS-Gulf route and 37 percent for the ND-Gulf route (table 2).

Total Landed Costs

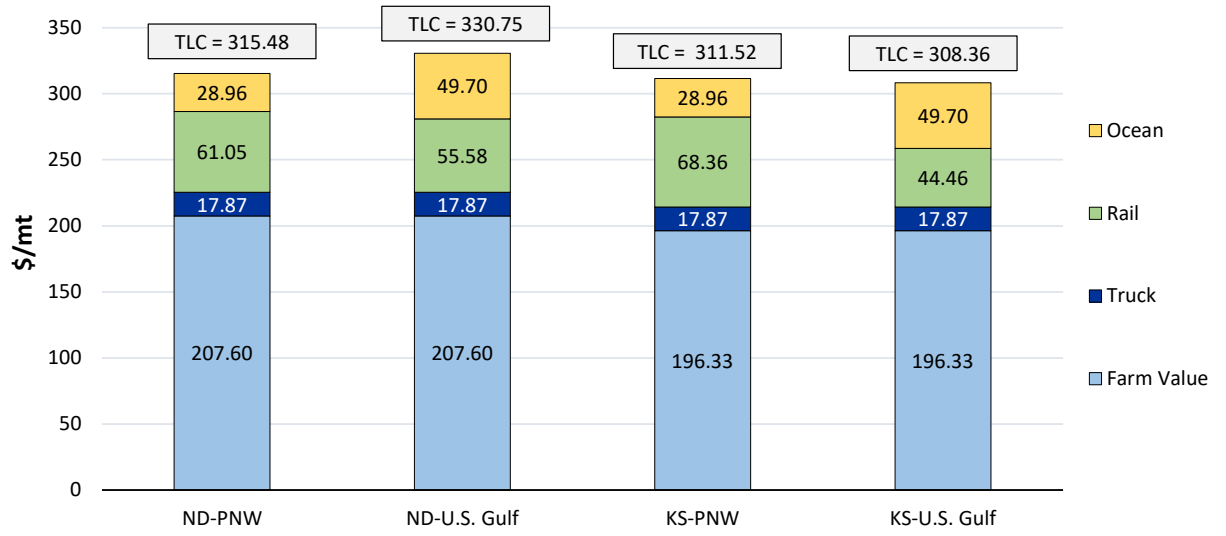
Total landed costs for shipping wheat fell for all routes, both quarter to quarter and year to year. The quarter-to-quarter drops were driven by declines in Kansas and North Dakota wheat transportation costs. Year to year, lower total landed costs derived from substantial declines in both wheat transportation costs and farm values in both States.

Total landed costs ranged from $308/mt to $331/mt (see fig. 1). Quarter to quarter, total landed costs showed the following declines: less than 1 percent each for the PNW routes and 2 percent each for Gulf routes. The year-to-year declines for total landed costs were 10 percent for the KS-PNW route; 18 percent for the ND-PNW route; 13 percent for the KS-Gulf route; and 19 percent for the ND-Gulf route.

Ocean Freight Rates

A combination of factors significantly drove down ocean freight rates from the PNW and Gulf regions— slowing global economic growth, higher vessel supply, and a seasonal (holiday) dip in demand for cargo (*Grain Transportation Report (GTR), January 30, 2025*). For the PNW routes, ocean freight rates were down 6 percent both quarter to quarter and year to year (table 1). For the Gulf routes, ocean freight rates were down 14 percent quarter to quarter and down 16 percent year to year (table 2).

Figure 1. Landed costs for shipping wheat from Kansas and North Dakota to Japan, fourth quarter 2024



Note: TLC = total landed costs; PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.
Source: USDA, Agricultural Marketing Service.

Rail and Truck Rates

Quarter to quarter, rail rates (including fuel surcharges) for shipping wheat via the KS-PNW route fell 1 percent and, via the ND-PNW route, rose 1 percent. Year to year, rail rates increased 3 percent for the KS-PNW route and fell 8 percent for the ND-PNW route. Quarter to quarter, rail rates decreased 1 percent for the KS-Gulf route and rose 1 percent for the ND-Gulf route. Year to year, rail rates were down 7 percent each for the KS-Gulf and ND-Gulf routes.

For all routes, strong demand for truck transportation following the fall harvest resulted in a 1-percent increase in truck rates quarter to quarter and a 7-percent increase year to year.

Wheat Market Outlook

According to FGIS, U.S. wheat inspections destined to Japan—accounting for 12 percent of total fourth-quarter 2024 U.S. wheat inspections—were 0.54 million metric tons (mmt). That volume was up less than 1 percent from the previous quarter and down 10 percent from fourth quarter 2023. For all of 2024, inspections of U.S. wheat destined to Japan totaled about 2.02 mmt, 9 percent of total U.S. wheat inspections. This total was up 2 percent from 2023.

In 2024, U.S. wheat inspected for export totaled 21.59 mmt, up 22 percent from 2023, reflecting increased shipments destined to Latin America and Asia, according to FGIS. According to USDA's March ***World Agricultural Supply and Demand Estimates report***, wheat exports for marketing year (MY) 2024/25 are projected to be 22.73 mmt—up 18 percent from MY 2023/24.

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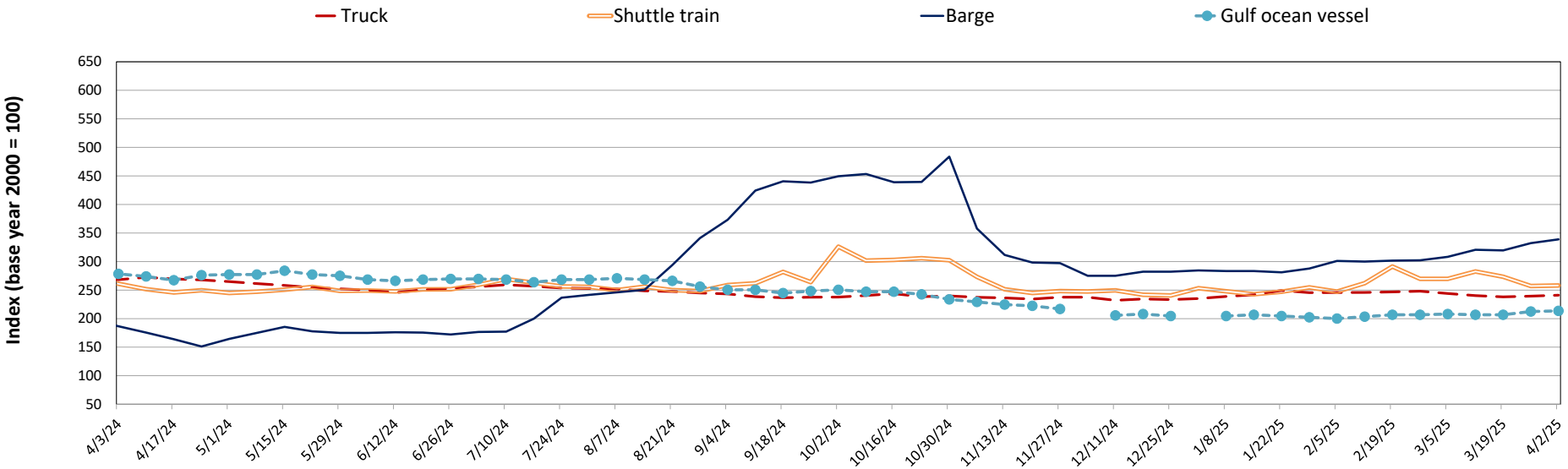
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
04/02/25	241	334	258	339	214	199
03/26/25	239	336	257	332	212	195
04/03/24	268	349	261	187	278	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.

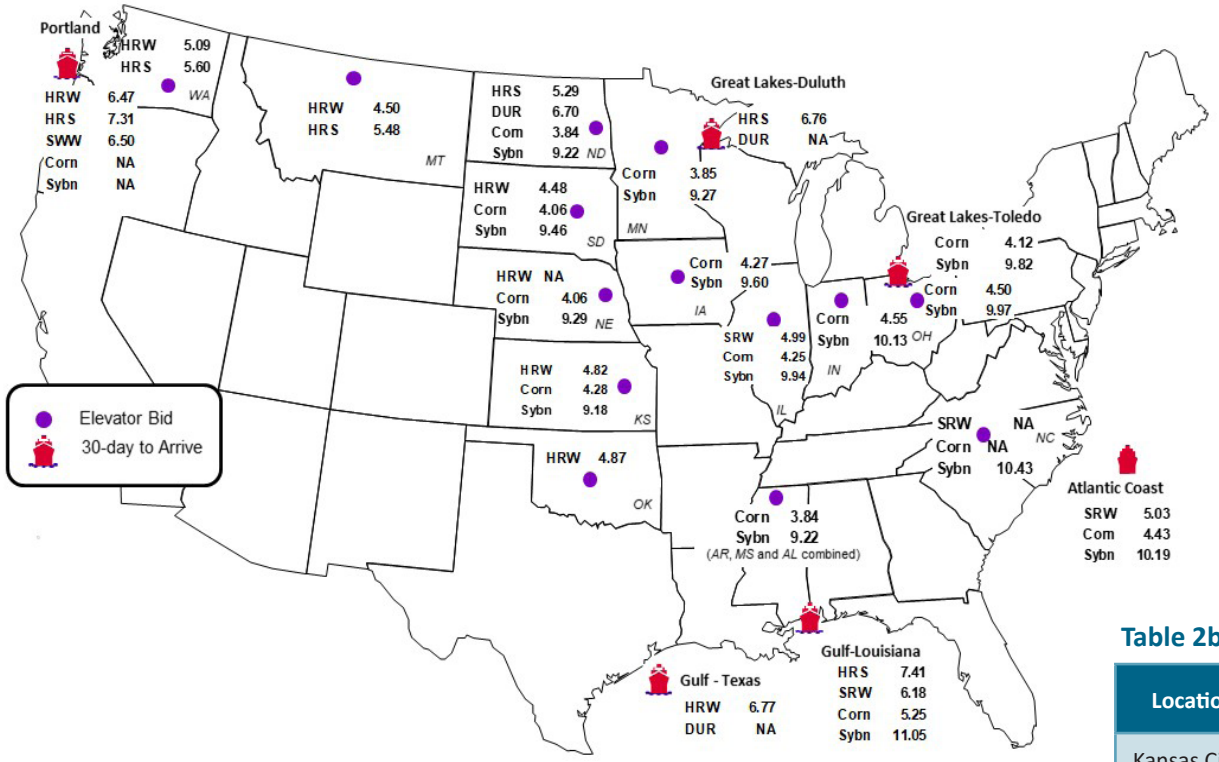
Figure 1. Grain transportation cost indicators as of week ending 4/2/25



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	3/28/2025	3/21/2025
Corn	IL–Gulf	-1.00	-0.98
Corn	NE–Gulf	-1.19	-1.15
Soybean	IA–Gulf	-1.45	-1.44
HRW	KS–Gulf	-1.95	-1.93
HRS	ND–Portland	-2.02	-1.92

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	3/28/2025	Week ago 3/21/2025	Year ago 3/29/2024
Kansas City	Wheat	May	5.522	5.780	5.672
Minneapolis	Wheat	May	5.810	6.050	6.450
Chicago	Wheat	May	5.282	5.476	5.500
Chicago	Corn	May	4.512	4.634	4.364
Chicago	Soybean	May	10.266	10.076	11.940

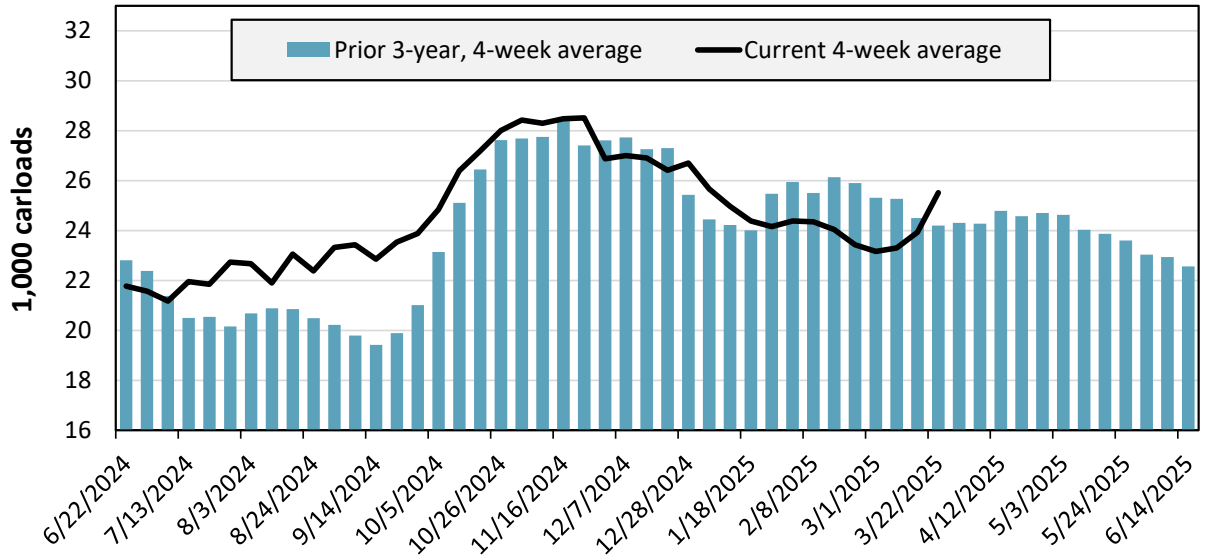
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 3/22/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,353	2,792	12,383	5,643	2,446	1,396	26,013
This week last year	1,352	2,815	10,248	7,052	2,911	804	25,182
2025 YTD	20,512	34,364	126,701	65,991	28,931	15,882	292,381
2024 YTD	20,177	32,937	127,001	63,545	35,858	13,164	292,682
2025 YTD as % of 2024 YTD	102	104	100	104	81	121	100
Last 4 weeks as % of 2024	107	103	105	107	89	153	105
Last 4 weeks as % of 3-yr. avg.	90	107	112	102	100	100	105
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 22, grain carloads were up 7 percent from the previous week, up 5 percent from last year, and up 5 percent from the 3-year average.

Source: Surface Transportation Board.

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

For the week ending: 3/21/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	25.8	27.9	20.7	17.9	12.4	56.3	16.2	25.3
	Average over last 4 weeks	27.1	29.5	43.3	19.5	13.1	44.5	17.6	27.8
	Average of same 4 weeks last year	34.4	36.7	33.1	17.0	7.7	15.4	18.7	23.3
Grain unit train speeds (miles per hour)	This week	20.7	18.8	23.7	21.2	23.4	21.1	22.9	21.7
	Average over last 4 weeks	21.8	19.2	24.2	21.3	23.9	20.5	23.5	22.0
	Average of same 4 weeks last year	23.3	17.2	24.3	22.4	25.1	23.3	26.9	23.2

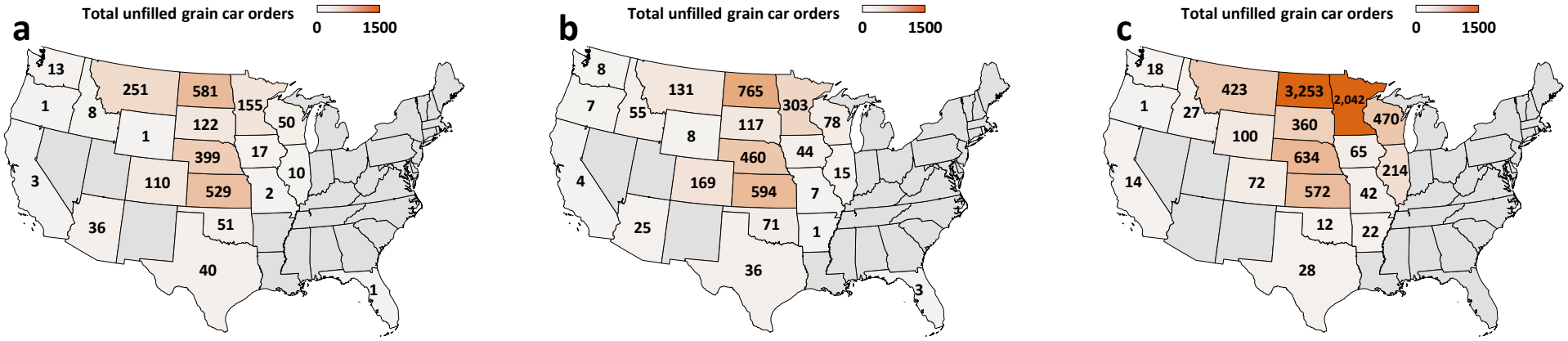
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 3/21/2025		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	64	16	327	110	9	41	5	572
	Average over last 4 weeks	67	7	542	97	12	42	28	794
	Average of same 4 weeks last year	29	9	612	92	5	38	22	807
Loaded grain cars not moved in over 48 hours (number)	This week	150	181	450	88	7	402	16	1,294
	Average over last 4 weeks	112	177	870	85	8	275	7	1,534
	Average of same 4 weeks last year	29	359	1,116	82	3	66	23	1,677
Grain unit trains held (number)	This week	0	0	21	7	0	5	3	36
	Average over last 4 weeks	1	0	25	10	1	4	2	42
	Average of same 4 weeks last year	1	4	23	5	0	3	6	41
Unfilled manifest grain car orders (number)	This week	1	0	686	1,103	0	590	200	2,580
	Average over last 4 weeks	3	1	932	1,371	0	596	50	2,951
	Average of same 4 weeks last year	1	4	6,675	706	0	983	65	8,433

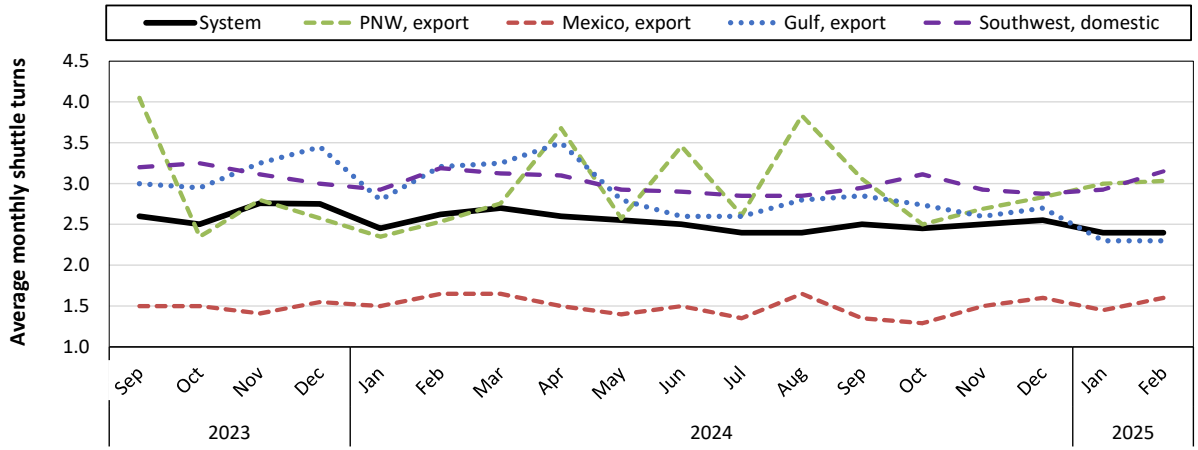
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 3/21/2025 (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

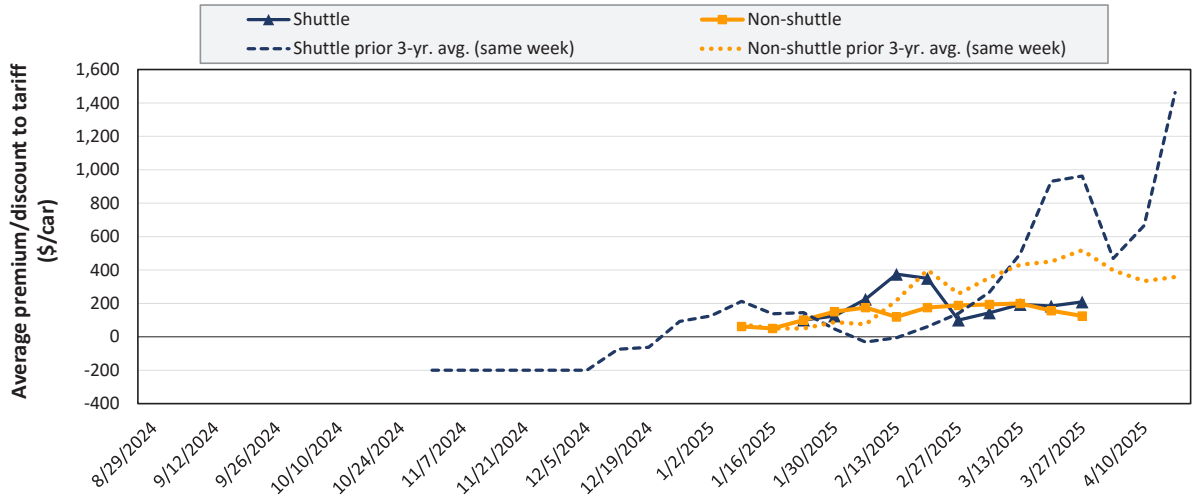


Average monthly systemwide grain shuttle turns for February 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.03 to PNW, 1.6 to Mexico, 2.3 to the Gulf, and 3.15 to the Southwest.

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



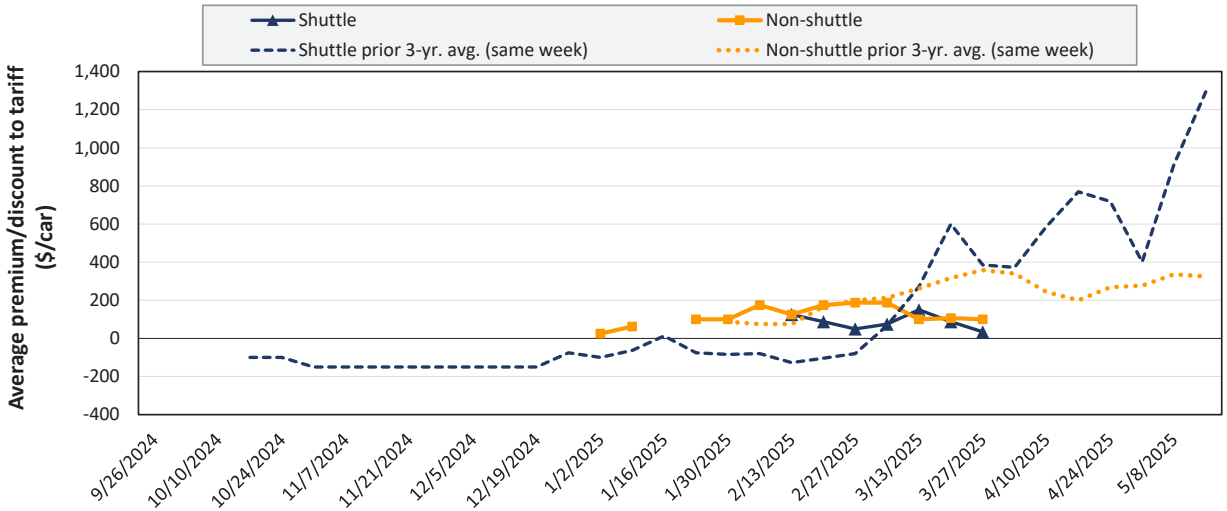
Average non-shuttle bids/offers fell $31 this week, and are $75 below the peak.

Average shuttle bids/offers rose $25 this week and are $166 below the peak.

3/27/2025	BNSF	UP
Non-Shuttle	$125	$125
Shuttle	$310	$108

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



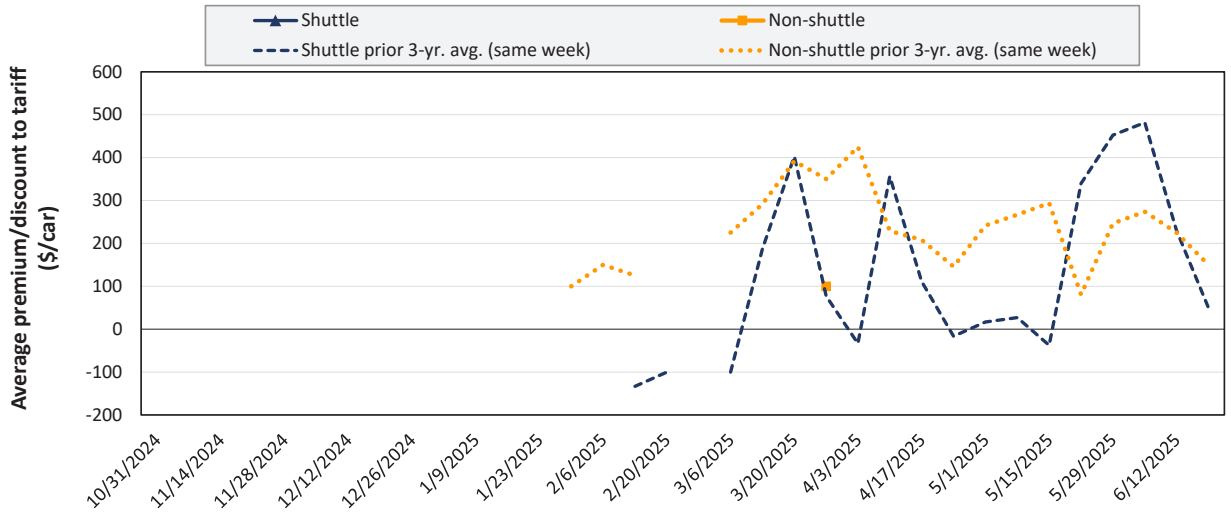
Average non-shuttle bids/offers fell $6 this week, and are $88 below the peak.

Average shuttle bids/offers fell $53 this week and are $116 below the peak.

3/27/2025	BNSF	UP
Non-Shuttle	$100	$100
Shuttle	$144	-$75

Note: Non-shuttle bids include unit-train and single-car bids. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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



There were no non-shuttle bids/offers last week. Average non-shuttle bids/offers this week are at the peak.

There were no shuttle bids/offers this week.

3/27/2025	BNSF	UP
Non-Shuttle	n/a	$100
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: 3/27/2025		Delivery period					
		Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25
Non-shuttle	BNSF	n/a	125	100	n/a	n/a	n/a
	Change from last week	n/a	-50	-25	n/a	n/a	n/a
	Change from same week 2024	n/a	-550	-400	n/a	n/a	n/a
	UP	n/a	125	100	100	n/a	n/a
	Change from last week	n/a	-13	12	n/a	n/a	n/a
	Change from same week 2024	n/a	-325	-300	-100	n/a	n/a
Shuttle	BNSF	450	310	144	n/a	n/a	100
	Change from last week	-375	-71	-31	n/a	n/a	n/a
	Change from same week 2024	n/a	-165	44	n/a	n/a	200
	UP	n/a	108	-75	n/a	n/a	n/a
	Change from last week	n/a	121	-75	n/a	n/a	n/a
	Change from same week 2024	n/a	-92	-275	n/a	n/a	n/a
	CPKC	300	0	-100	-75	n/a	n/a
	Change from last week	-200	0	n/a	125	n/a	n/a
	Change from same week 2024	n/a	-200	-100	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, April 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	$162	$51.17	$1.39	20
	Grand Forks, ND	Duluth-Superior, MN	$3,862	$33	$38.68	$1.05	9
	Wichita, KS	Los Angeles, CA	$7,020	$168	$71.38	$1.94	1
	Wichita, KS	New Orleans, LA	$4,425	$285	$46.77	$1.27	-9
	Sioux Falls, SD	Galveston-Houston, TX	$6,966	$138	$70.55	$1.92	4
	Colby, KS	Galveston-Houston, TX	$4,675	$312	$49.52	$1.35	-9
	Amarillo, TX	Los Angeles, CA	$5,585	$434	$59.77	$1.63	7
Corn	Champaign-Urbana, IL	New Orleans, LA	$5,385	$322	$56.67	$1.44	4
	Toledo, OH	Raleigh, NC	$8,877	$0	$88.15	$2.24	0
	Des Moines, IA	Davenport, IA	$3,619	$68	$36.62	$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	$200	$48.71	$1.24	5
	Des Moines, IA	Los Angeles, CA	$6,585	$583	$71.19	$1.81	2
Soybeans	Minneapolis, MN	New Orleans, LA	$3,368	$464	$38.06	$1.04	3
	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	$322	$56.03	$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, April 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	$97	$44.09	$1.20	5
	Wichita, KS	Galveston-Houston, TX	$4,411	$75	$44.55	$1.21	6
	Chicago, IL	Albany, NY	$7,413	$0	$73.61	$2.00	0
	Grand Forks, ND	Portland, OR	$6,001	$167	$61.25	$1.67	3
	Grand Forks, ND	Galveston-Houston, TX	$5,446	$171	$55.78	$1.52	3
	Garden City, KS	Portland, OR	$6,695	$214	$68.61	$1.87	-
Corn	Minneapolis, MN	Portland, OR	$5,510	$204	$56.74	$1.44	-5
	Sioux Falls, SD	Tacoma, WA	$5,470	$186	$56.17	$1.43	-5
	Champaign-Urbana, IL	New Orleans, LA	$4,625	$322	$49.13	$1.25	4
	Lincoln, NE	Galveston-Houston, TX	$4,860	$109	$49.34	$1.25	4
	Des Moines, IA	Amarillo, TX	$5,125	$252	$53.39	$1.36	4
	Minneapolis, MN	Tacoma, WA	$5,510	$202	$56.72	$1.44	-5
	Council Bluffs, IA	Stockton, CA	$6,080	$209	$62.45	$1.59	2
Soybeans	Sioux Falls, SD	Tacoma, WA	$6,185	$186	$63.27	$1.72	-5
	Minneapolis, MN	Portland, OR	$6,235	$204	$63.94	$1.74	-5
	Fargo, ND	Tacoma, WA	$6,085	$166	$62.07	$1.69	-4
	Council Bluffs, IA	New Orleans, LA	$5,550	$371	$58.80	$1.60	3
	Toledo, OH	Huntsville, AL	$5,564	$0	$55.25	$1.50	1
	Grand Island, NE	Portland, OR	$6,185	$524	$66.62	$1.81	3

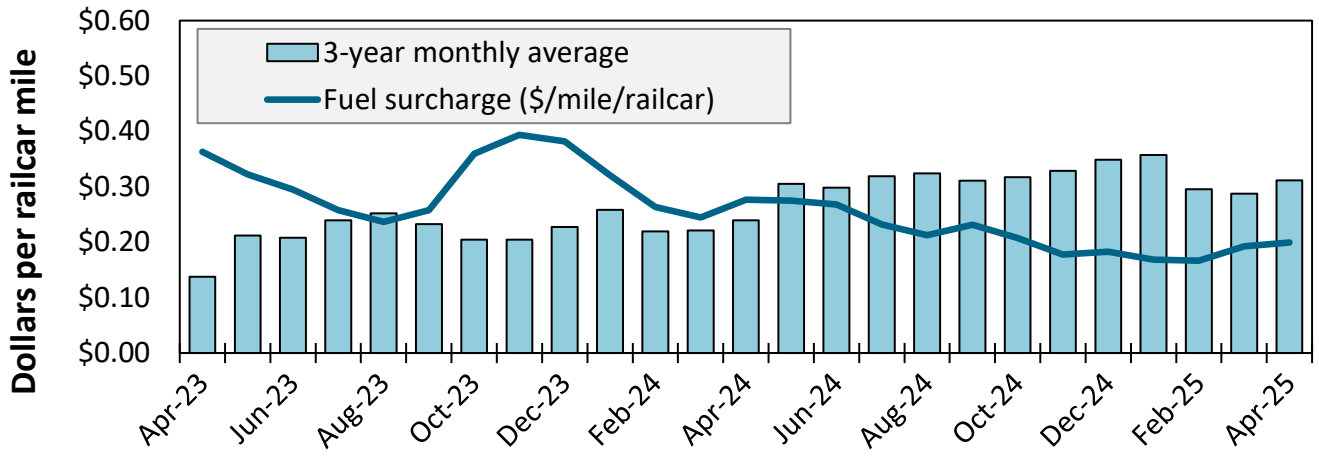
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel 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, April 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	$4,701	$46.27	$1.18	0.3	4.1
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,578	$54.90	$1.39	0.2	-0.1
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	$6,105	$60.09	$1.53	0.2	-0.3
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,484	$53.97	$1.37	0.2	0.0
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,698	$56.08	$1.42	0.2	-0.1
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,714	$46.40	$1.18	0.3	3.8
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,094	$50.14	$1.27	0.3	3.9
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,229	$51.46	$1.31	0.2	3.7
Corn	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,111	$50.30	$1.28	0.2	4.3
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,578	$54.90	$1.49	0.2	-0.1
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,639	$65.34	$1.78	0.2	3.0
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,484	$53.97	$1.47	0.2	0.0
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,698	$56.08	$1.53	0.2	-0.1
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,742	$66.36	$1.81	0.2	2.9
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$4,005	$39.42	$1.07	0.3	0.6
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$3,587	$35.30	$0.96	0.3	1.1
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,817	$47.41	$1.29	0.2	-8.8
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,484	$53.97	$1.47	0.2	0.0
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,602	$45.29	$1.23	0.2	-9.0

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).

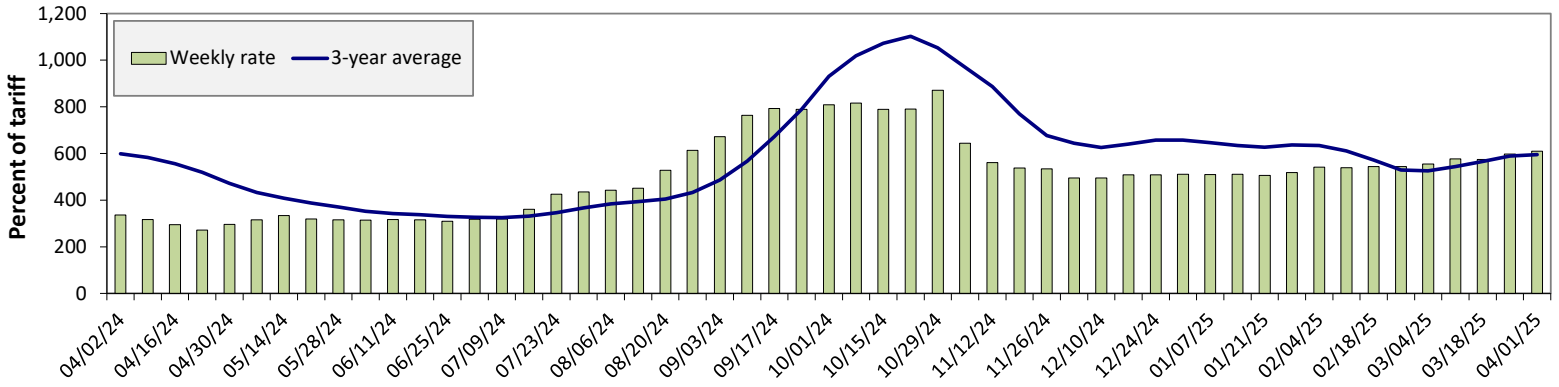
Figure 9. Railroad fuel surcharges, North American weighted average



April 2025: $0.20/mile, up 1 cent from last month’s surcharge of $0.19/mile; down 8 cents from the April 2024 surcharge of $0.28/mile; and down 11 cents from the April prior 3-year average of $0.31/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 April 1: 2 percent higher than the previous week; 81 percent higher than last year; and 3 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

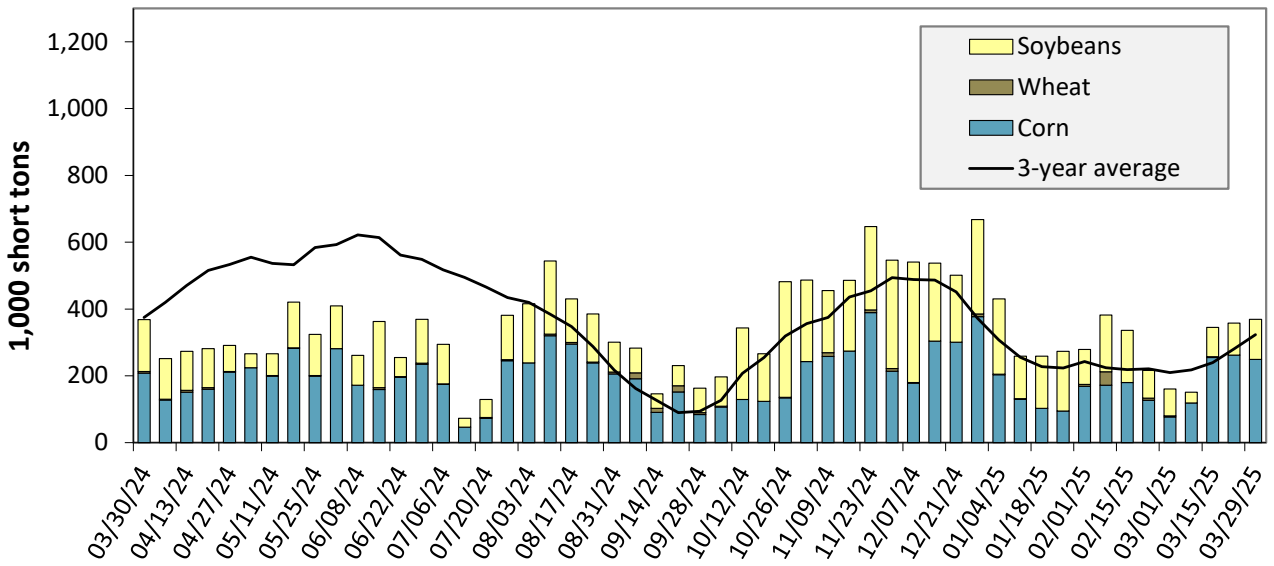
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	4/1/2025	600	604	610	428	413	357
	3/25/2025	606	592	598	452	433	365
$/ton	4/1/2025	37.14	32.13	28.30	17.08	19.37	11.21
	3/25/2025	37.51	31.49	27.75	18.03	20.31	11.46
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	58	74	81	78	41	57
	3-year avg.	-4	-1	3	-10	-23	-13
Rate	May	509	476	447	339	342	292
	July	461	417	402	309	314	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 29: 0.3 percent higher than last year and 14 percent higher than the 3-year average.

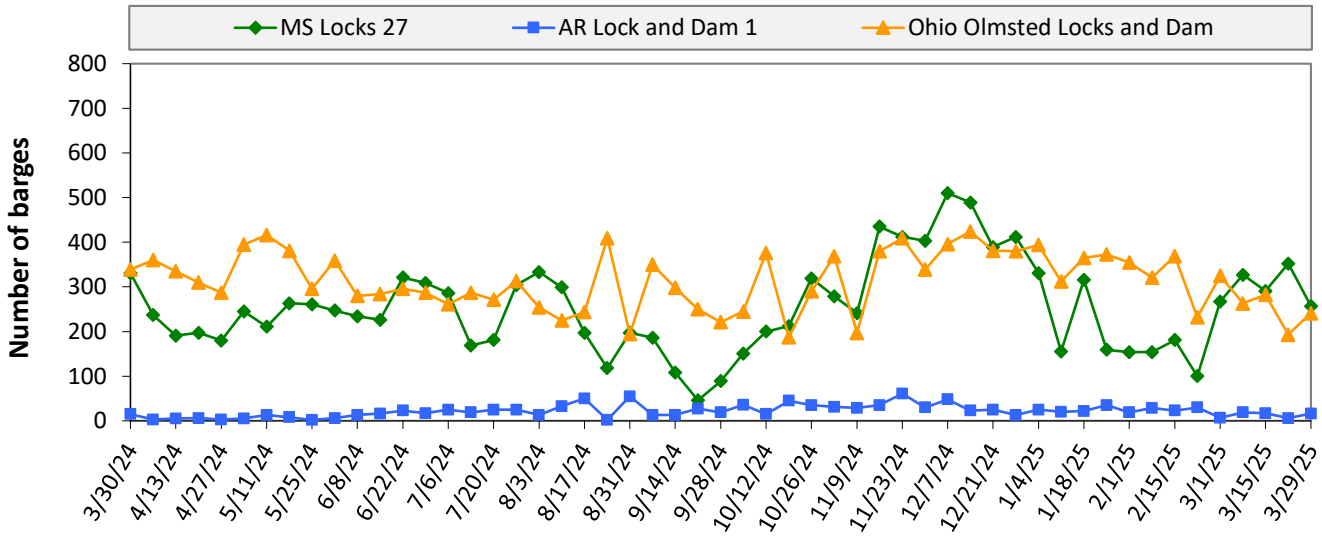
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 03/29/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	27	0	28	0	54
Mississippi River (Winfield, MO (L25))	120	0	82	0	202
Mississippi River (Alton, IL (L26))	237	0	124	0	360
Mississippi River (Granite City, IL (L27))	249	0	120	0	369
Illinois River (La Grange)	117	0	21	0	137
Ohio River (Olmsted)	151	7	108	7	274
Arkansas River (L1)	0	14	28	0	43
Weekly total - 2025	401	22	256	7	686
Weekly total - 2024	374	59	226	0	659
2025 YTD	4,066	249	3,070	71	7,456
2024 YTD	3,035	429	3,583	66	7,113
2025 as % of 2024 YTD	134	58	86	108	105
Last 4 weeks as % of 2024	111	44	86	284	97
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.

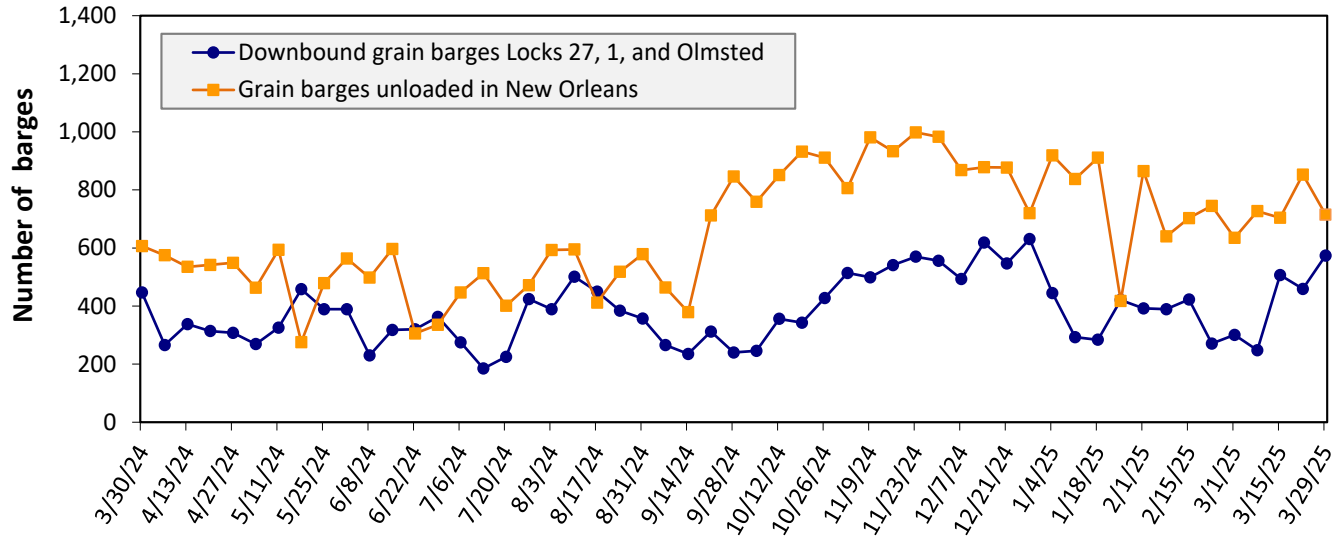
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending March 29: 514 barges transited the locks, 37 barges fewer than the previous week, and 16 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 29: 574 barges moved down river, 115 more than the previous week; 715 grain barges unloaded in the New Orleans Region, 16 percent fewer 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	
		April 2025	March 2025	April 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.57	$21.55	$20.94	3.0	6.0
	Central Ferry, WA/Almota, WA	$20.67	$20.65	$20.07	3.0	5.9
	Lyons Ferry, WA	$19.66	$19.64	$19.10	3.0	5.7
	Windust, WA/Lower Monumental, WA	$18.63	$18.61	$18.11	2.9	5.4
	Sheffler, WA	$18.60	$18.58	$18.08	2.9	5.5
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.40	$17.38	$16.93	2.8	5.1
	Port Kelly, WA/Wallula, WA	$17.18	$17.16	$16.72	2.8	5.0
	Umatilla, OR	$17.08	$17.06	$16.62	2.8	5.0
	Boardman, OR/Hogue Warner, OR	$16.82	$16.80	$16.37	2.8	5.0
	Arlington, OR/Roosevelt, WA	$16.66	$16.64	$16.22	2.8	4.9
	Biggs, OR	$15.33	$15.31	$14.94	2.7	4.5
	The Dalles, OR	$14.23	$14.21	$13.88	2.6	4.1

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)

March, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	125	0	125
Columbia River (Bonneville Lock and Dam (L1))	148	0	148
Monthly total 2025	148	0	148
Monthly total 2024	39	0	39
2025 YTD	905	0	905
2024 YTD	382	0	382

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.

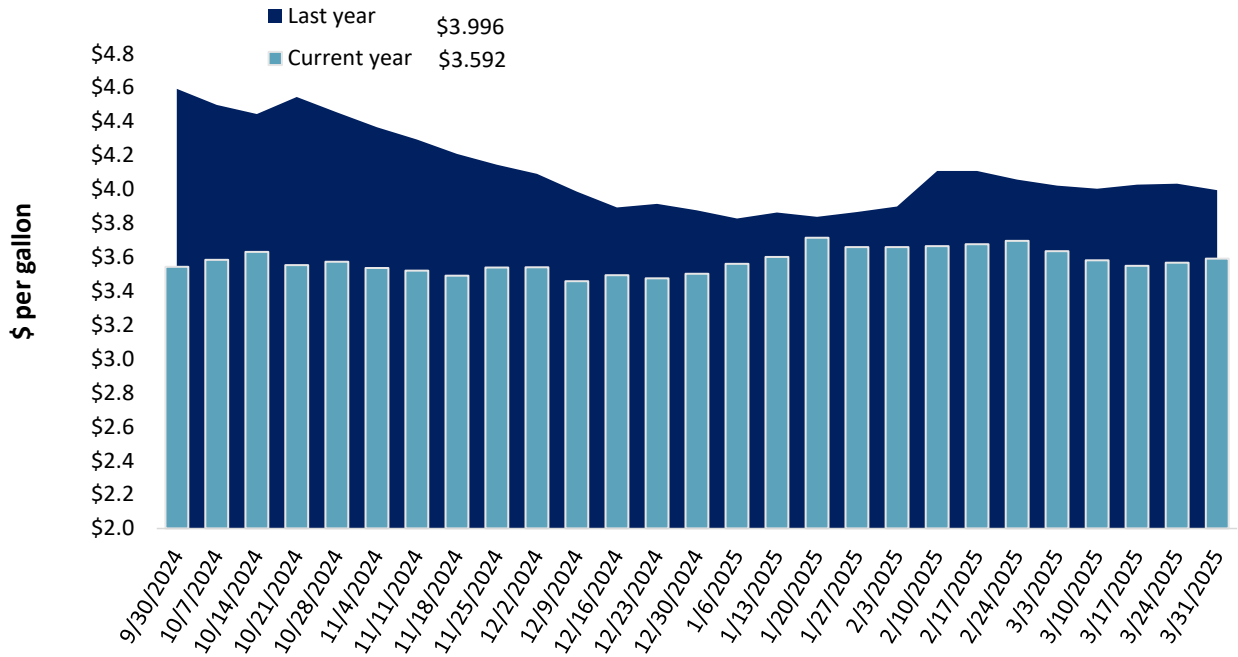
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 3/31/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.695	0.020	-0.388
	New England	3.983	-0.004	-0.322
	Central Atlantic	3.869	-0.003	-0.402
	Lower Atlantic	3.601	0.032	-0.389
II	Midwest	3.519	0.028	-0.430
III	Gulf Coast	3.282	0.017	-0.388
IV	Rocky Mountain	3.472	0.057	-0.477
V	West Coast	4.259	0.030	-0.392
	West Coast less California	3.811	0.057	-0.336
	California	4.776	0.000	-0.445
Total	United States	3.592	0.025	-0.404

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 31, the U.S. average diesel fuel price increased 2.5 cents from the previous week to $3.592 per gallon, 40.4 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 3/20/2025	1,355	655	1,321	1,232	64	4,628	20,041	5,704	30,373
	This week year ago	1,055	1,195	1,467	924	71	4,712	17,525	4,143	26,380
	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	3,788	2,464	5,311	4,437	272	16,272	33,019	40,056	89,348
	2023/24 YTD	2,559	3,102	4,889	3,059	411	14,020	25,378	36,212	75,610
	YTD 2024/25 as % of 2023/24	148	79	109	145	66	116	130	111	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 3/20/2025	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	18,905	18,252	4	17,746
Japan	8,850	7,305	21	9,366
China	33	1,923	-98	8,233
Colombia	5,385	4,290	26	4,383
Korea	3,499	1,423	146	1,565
Top 5 importers	36,671	33,192	10	41,293
Total U.S. corn export sales	53,061	42,903	24	51,170
% of YTD current month's export projection	85%	74%	-	-
Change from prior week	1,040	1,207	-	-
Top 5 importers' share of U.S. corn export sales	69%	77%	-	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 3/20/2025	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	21,837	23,301	-6	28,636
Mexico	4,128	4,142	-0	4,917
Japan	1,611	1,740	-7	2,231
Egypt	2,541	482	427	2,228
Indonesia	1,311	1,399	-6	1,910
Top 5 importers	31,427	31,065	1	39,922
Total U.S. soybean export sales	45,760	40,355	13	51,302
% of YTD current month's export projection	92%	87%	-	-
Change from prior week	338	264	-	-
Top 5 importers' share of U.S. soybean export sales	69%	77%	-	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 3/20/2025	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	3,924	3,183	23	3,298
Philippines	2,608	2,759	-5	2,494
Japan	2,047	1,984	3	2,125
China	139	2,088	-93	1,374
Korea	2,370	1,405	69	1,274
Taiwan	959	1,096	-13	921
Nigeria	636	243	162	920
Thailand	863	455	90	552
Colombia	419	294	42	522
Vietnam	567	426	33	313
Top 10 importers	14,531	13,932	4	13,792
Total U.S. wheat export sales	20,900	18,732	12	18,323
% of YTD current month's export projection	92%	97%	-	-
Change from prior week	100	340	-	-
Top 10 importers' share of U.S. wheat export sales	70%	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.

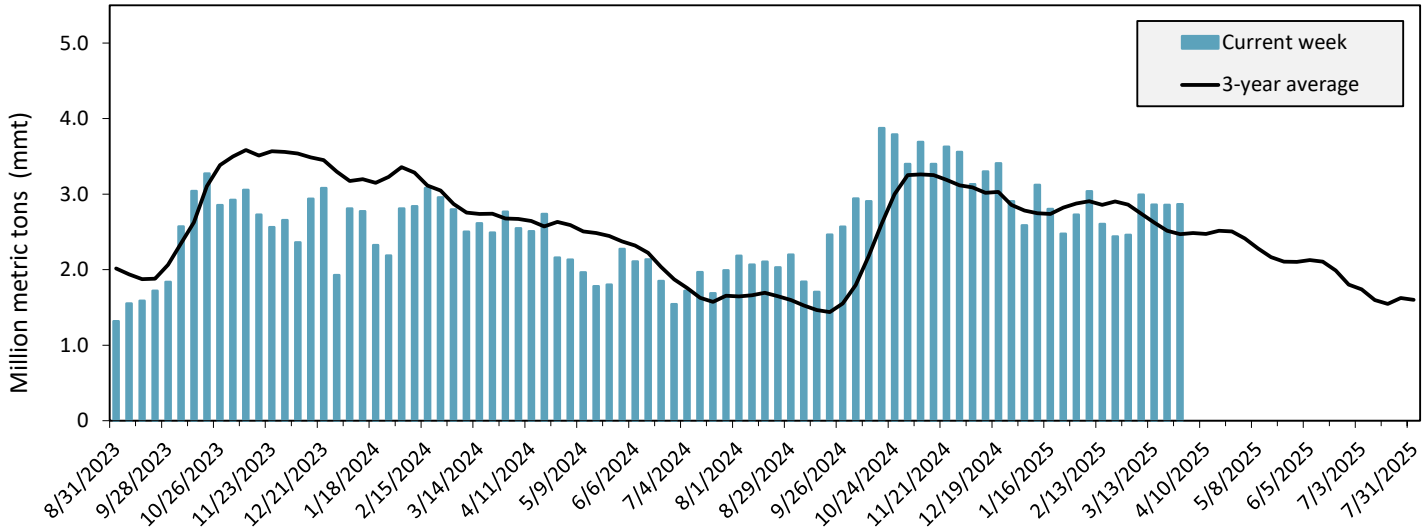
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 03/27/2025	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	450	531	85	5,757	4,035	143	120	211	13,987
	Soybeans	206	133	154	1,657	2,379	70	129	155	10,445
	Wheat	119	195	61	2,387	2,360	101	99	106	11,453
	All grain	775	859	90	9,871	9,368	105	111	146	37,186
Mississippi Gulf	Corn	947	721	131	9,167	5,881	156	159	110	27,407
	Soybeans	466	561	83	7,318	8,563	85	114	131	29,741
	Wheat	134	129	104	813	1,442	56	52	87	4,523
	All grain	1,547	1,411	110	17,298	15,941	109	125	114	61,789
Texas Gulf	Corn	10	0	n/a	105	122	86	108	162	570
	Soybeans	0	20	0	106	0	n/a	n/a	-	741
	Wheat	104	109	95	691	337	205	293	222	1,940
	All grain	115	133	86	987	1,590	62	108	91	6,965
Interior	Corn	203	279	73	2,698	3,097	87	94	115	13,463
	Soybeans	119	108	109	1,566	2,076	75	86	89	8,059
	Wheat	79	52	152	686	675	102	95	116	2,952
	All grain	423	442	96	5,022	5,930	85	92	107	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	4	7	50	92	107	87	146	209	410
	Soybeans	3	5	56	413	400	103	108	10	1,272
	Wheat	0	0	n/a	0	10	0	n/a	n/a	73
	All grain	6	12	53	505	517	98	115	27	1,754
All Regions	Corn	1,614	1,538	105	17,819	13,242	135	131	134	56,109
	Soybeans	793	827	96	11,164	13,470	83	111	116	50,865
	Wheat	436	485	90	4,600	4,854	95	91	111	21,594
	All grain	2,866	2,856	100	33,809	33,428	101	114	117	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.

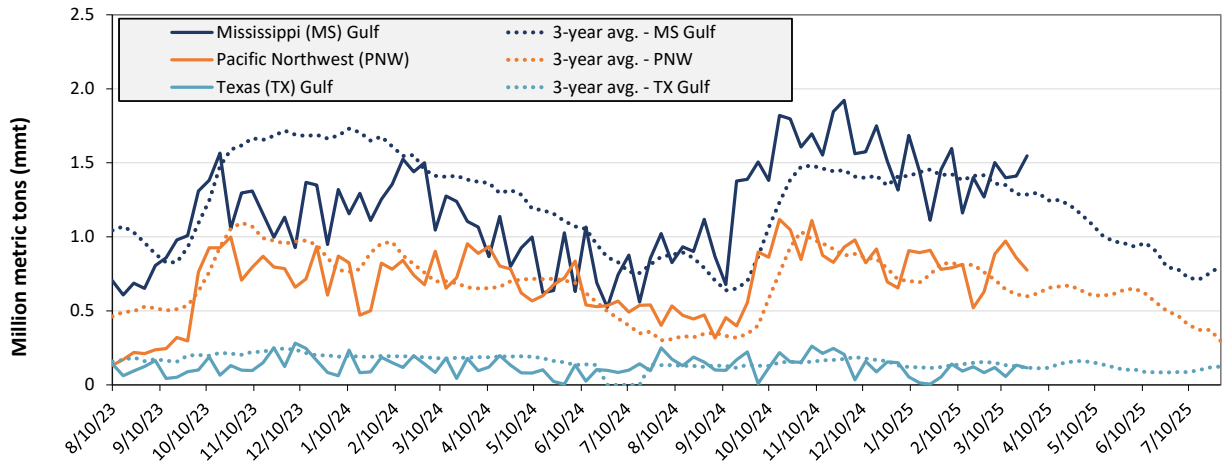
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Mar. 27: 2.9 mmt of grain inspected, unchanged from the previous week, up 11 percent from the same week last year, and up 16 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 03/27/25 inspections (mmt):
MS Gulf: 1.55
PNW: 0.78
TX Gulf: 0.11

Percent change from:	MS ulf	TX ulf	U.S. Gulf	PNW
Last week	up 10	down 14	up 8	down 10
Last year (same 7 days)	up 2	up 7	up 33	down 6
3-year average (4-week moving average)	up 20	down 1	up 19	up 29

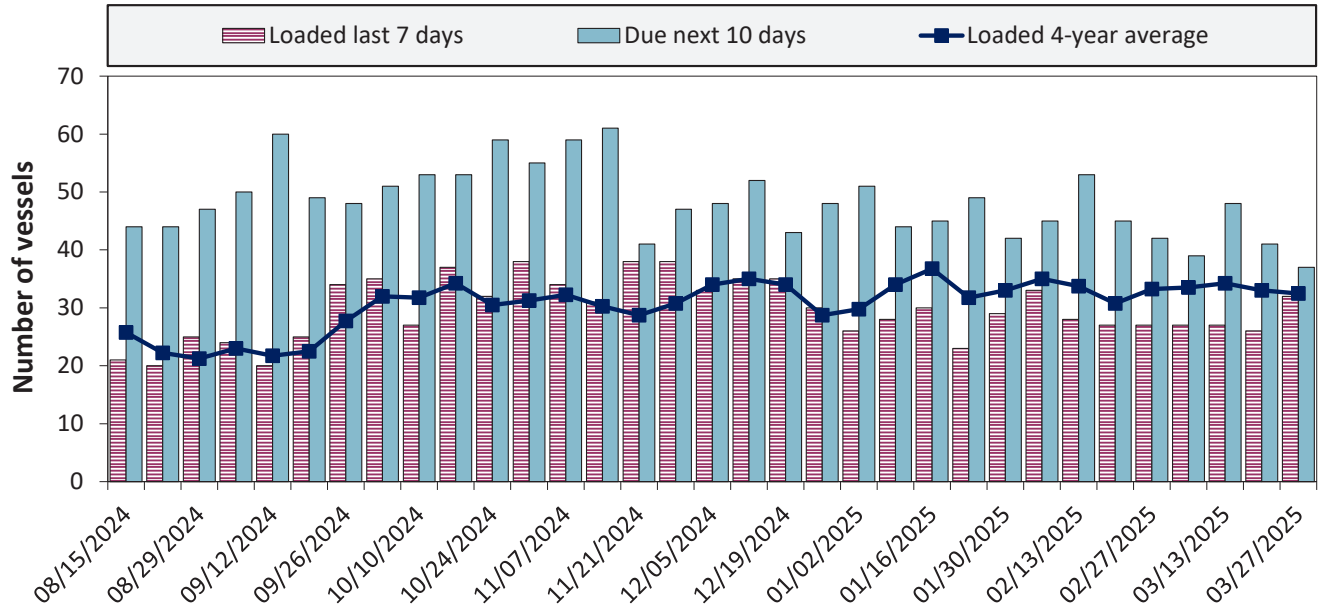
Source: USDA, Federal Grain Inspection Service.

Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
3/27/2025	39	32	37	16
3/20/2025	36	26	41	23
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.

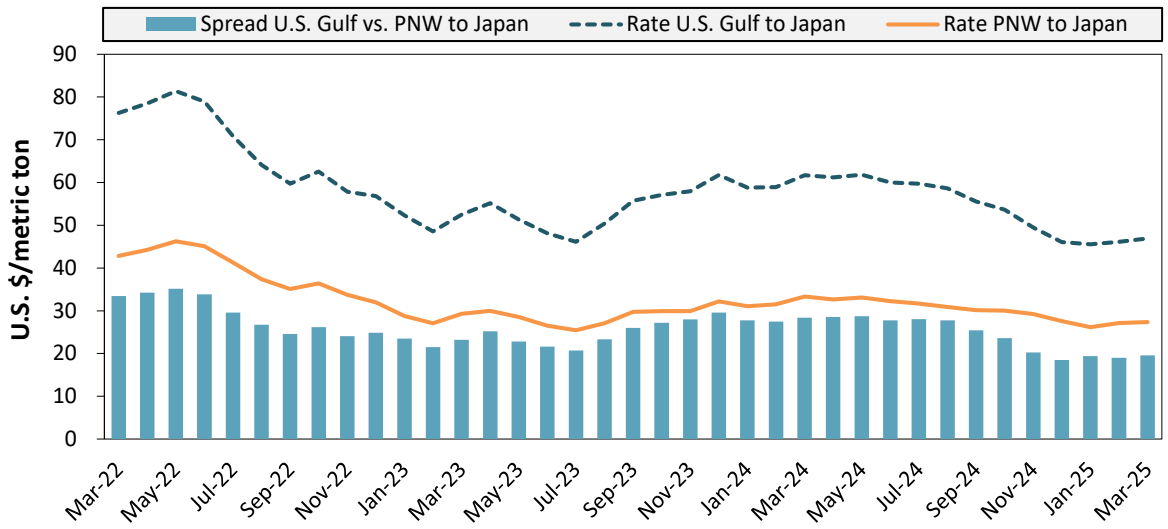
Figure 19. U.S. Gulf vessel loading activity



Week ending 03/27/25, number of vessels	Loaded	Due
Change from last year	10%	-18%
Change from 4-year average	-2%	-10%

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
March 2025	$46.94	$27.38	$19.56
Change from March 2024	-24%	-18%	-31%
Change from 4-year average	-25%	-21%	-29%

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

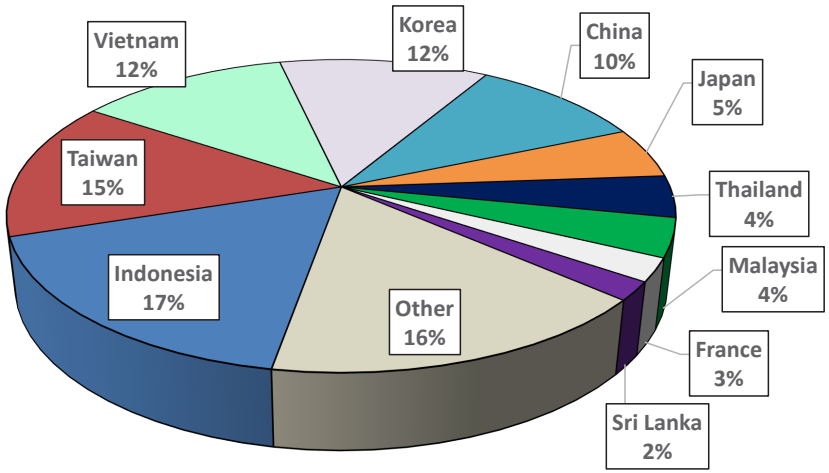
Table 20. Ocean freight rates for selected shipments, week ending 3/29/2025

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 28, 2025	May 1/10, 2025	50,000	39.75
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, 2025	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

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.

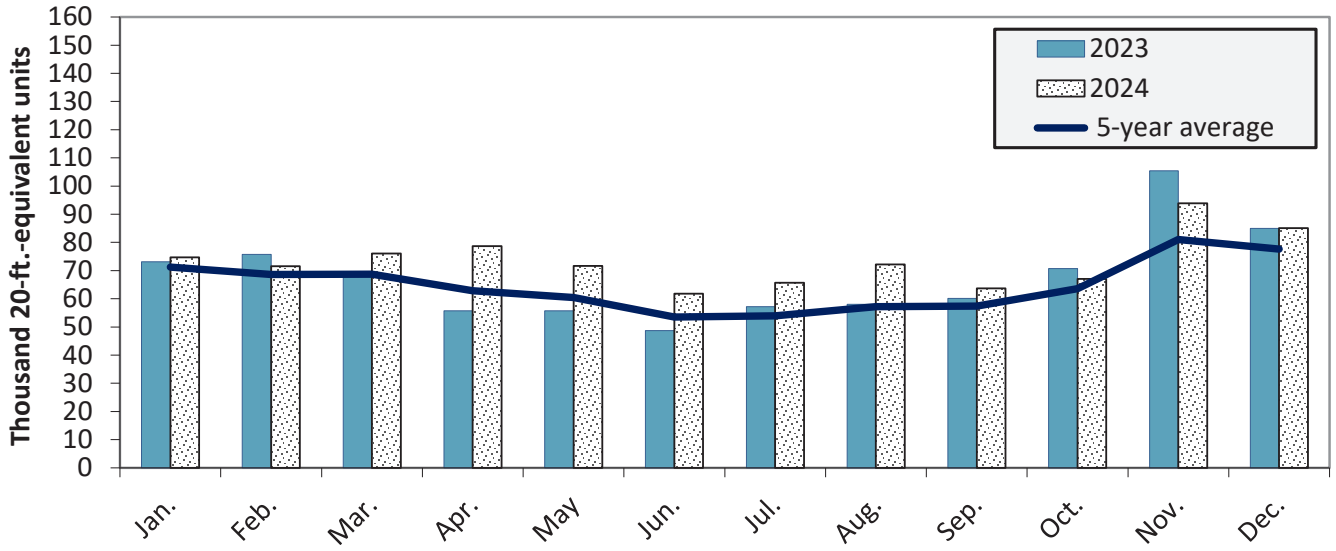
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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