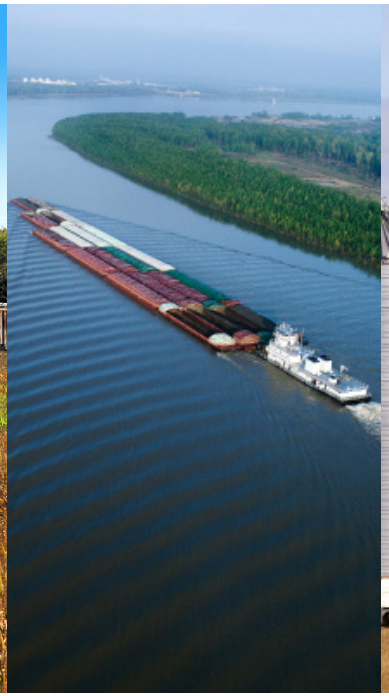
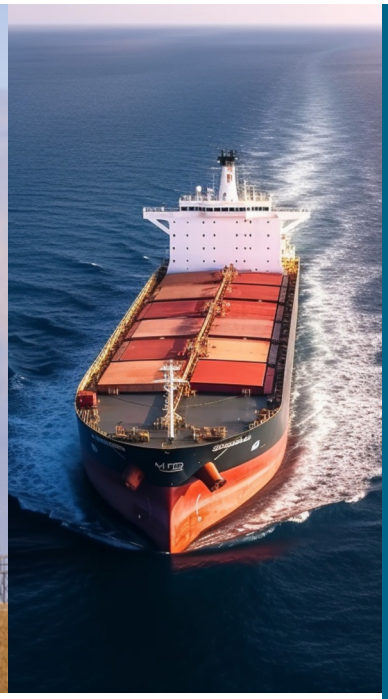
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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CN Grain Carloads Reach All-Time Weekly High. According to data from the Surface Transportation Board, Canadian National Railway (CN) achieved an all-time weekly record of 2,384 originated grain carloads on its U.S. network, for the week ending April 5 (Grain Transportation Report (GTR) table 3). For comparison, this amount was 82 percent higher than the previous week and 69 percent higher than the 5-year average for the same week.

CN's U.S. network connects export terminals on the U.S. Gulf with inland grain elevators—primarily, in Illinois, and to a lesser degree, Iowa and Wisconsin. Running parallel to the Mississippi River, CN's U.S. network substitutes for barge transport, and CN's grain carloads generally peak during periods of barge disruptions (e.g., following the 2022 harvest) or during strong export demand.

The surge in CN's grain carloads likely reflected a surge of export demand, anticipating changes in trade relations between the United States and major grain buyers.

High Water and Delayed Lock Reopening Slow Barge Traffic. As of April 17, docks on the upper Ohio River have begun to reopen after being closed last week because of high water from severe storms (GTR, April 10, 2025, first highlight). Docks along the lower Ohio River should be able to begin loading by the end of this week. Currently, however, at the Smithland Lock and Dam (in Brookport, IL, on the lower Ohio River) mechanical problems are halting tows to and from the river. The lock is expected to reopen over the weekend. According to the National Oceanic and Atmospheric Administration (NOAA)—in Baton Rouge, LA, flooding is expected to crest on April 26 at 40.5 feet, which is considered major flooding. Since the minor flood stage at Baton Rouge, assist boats have had to help vessels pass under bridges in the area. Daylight restrictions for high water continue around Memphis, TN, and Vicksburg, MS.

The reopening of the Mel Price Lock and Dam's main chamber was moved from April 11 to April 15 to accommodate unanticipated repair needs. With the lock's reopening, barge movements through the area will take a few days to normalize, and delays of 1-2 days are expected.

STB Vacates Prior Decision, Favors CP Over North Dakota Grain Shipper. On April 11, the Surface Transportation Board (STB) voted unanimously to vacate a previous decision involving a North Dakota grain elevator's access to BNSF Railway (BNSF) under a haulage service agreement with Canadian Pacific Railway (CP).

In 2007, STB allowed CP to acquire, from BNSF, full ownership of about 45 miles of rural branch lines in northwest North Dakota. STB also gave BNSF the right to serve shippers through a haulage service agreement. In 2018, one of those shippers—New Century Ag (NCA), petitioned STB to reopen the 2007 proceeding—arguing that CP had violated the haulage agreement by limiting the number of BNSF cars that could interchange with CP lines (thus, denying NCA shuttle service by BNSF).

After STB granted NCA's petition in a 2020 decision, CP petitioned the Board to reconsider the case in 2021—claiming STB took an "unprecedented step" in reopening a minor transaction proceeding. In an April 11 decision, STB granted CP's petition for reconsideration and denied NCA's petition for improved access to BNSF.

USDA Supports New Biofuels Infrastructure. Under the Higher Blends Infrastructure Incentive Program (HBIIP), USDA will release nearly $260 million in grants for ethanol and biodiesel projects. The funding is from a pot of $537 million in unfulfilled grants for 543 projects in 29 States. With the newly released grants, USDA underscores its commitment to fortifying rural communities "and their essential role in building a stronger, more energy secure America."

To install storage tanks and dispensers for ethanol and biodiesel, individual companies will receive 17 HBIIP grants worth $19.7 million in Iowa and, in California, 57 grants for State projects worth $68.1 million. As noted by *Transport Topics*, Iowa's 10 biodiesel plants produce 416 million gallons annually, making Iowa the foremost U.S. producer of ethanol and biodiesel.

Among several multistate companies awarded HBIIP grants, Anabi Real Estate Development will receive $4.3 million for installations across 22 fueling stations in California, Florida, and Nevada. All the grants are expected to boost biofuels production, which in turn, would raise demand for transporting biofuels.

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 April 3, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 27.41 million metric tons (mmt), down 6 percent from last week and up 20 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 0.79 mmt, down 33 percent from last week. Net **soybean export sales** were 0.17 mmt, down 58 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.11 mmt, down 68 percent from last week.

Rail

U.S. Class I railroads originated 28,101 **grain carloads** during the week ending April 5. This was a 3-percent increase from the previous week, 7 percent more than last year, and 13 percent more than the 3-year average.

Average April **shuttle secondary railcar bids/offers** (per car) were $7 below tariff for the week ending April 10. This was $63 less than last week and $55 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $250 above tariff. This was $150 more than last week and $125 lower than this week last year.

Barge

For the week ending April 12, **barged grain movements** totaled 562,400 tons. This was 53 percent more than the previous week and 13 percent more than the same period last year.

For the week ending April 12, 349 grain barges **moved down river**—86 more than last week. There were 735 grain barges **unloaded** in the New Orleans region, 2 percent fewer than last week.

Ocean

For the week ending April 10, 33 **oceangoing grain vessels** were loaded in the Gulf—50 percent more than the same period last year. Within the next 10 days (starting April 11), 53 vessels were expected to be loaded—29 percent more than the same period last year.

As of April 10, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.00, down 4 percent from the previous week. The rate from the Pacific Northwest to Japan was $27.00 per mt, down 5 percent from the previous week.

Fuel

For the week ending April 14, the U.S. average **diesel price** decreased 6.0 cents from the previous week, to $3.579 per gallon—43.6 cents below the same week last year.

Export Sales Update for Marketing Year 2024/25

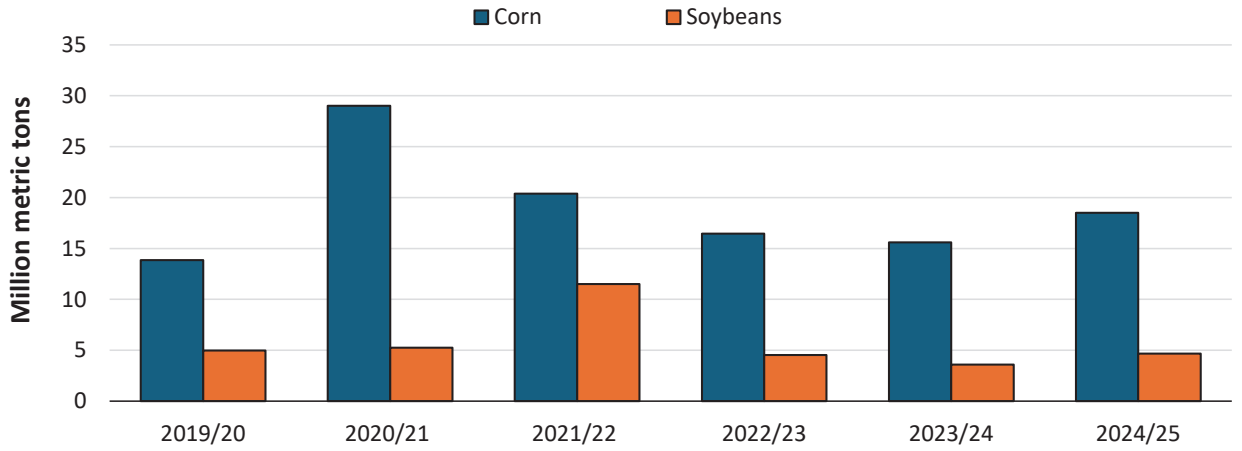
Export sales of U.S. grain (corn, soybeans, and wheat) propel demand for grain export transportation: the majority of exported grain ships by barge and/or rail to export facilities. From there, ocean vessels carry shipments to final destinations. This article reports on the year-to-date (YTD) export demand for U.S. grain transportation.

As of April 3, YTD U.S. grain exports for marketing year (MY) 2024/25 were strong, despite declining U.S. grain exports to China—once a top buyer of U.S. grains. The strong total of U.S. grain exports raised the demand for grain transportation and accelerated the pace of U.S. grain shipments. As of April 3, compared to the same period in MY 2023/24, YTD accumulated grain exports were up 18 percent, and outstanding sales were up 20 percent (figs. 1 and 2) (***Grain Transportation Report (GTR) table 14***).[1]

Corn Export Sales Largest Since 2021/22

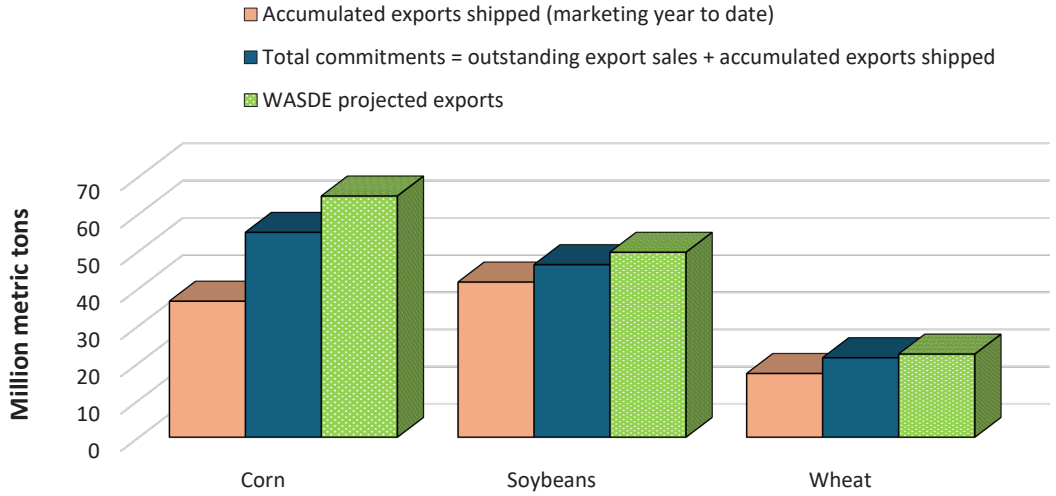
Despite reduced corn purchases by China, U.S. corn exports have been fortified by prices that outcompete those of all other major exporting countries; low exportable supplies of major exporters; and strong demand—from both longstanding and emerging markets.

Figure 1. Outstanding sales of U.S. corn and soybeans: September 1 to April 3, 2019/20-2024/25



Source: USDA, Foreign Agricultural Service.

Figure 2. Export indicators 2024/25: total commitments, cumulative and projected exports



Note: Accumulated exports shipped (orange column) and total commitments (yellow column) are for the marketing year through April 3. The April *World Agricultural Supply and Demand Estimates* (*WASDE*) report's projected exports (green column) reflect the entire marketing year.
Source: USDA, Agricultural Marketing Service.

1 Unless otherwise specified, outstanding export sales mentioned in this article refer to MY 2024/25. Total commitments to purchase U.S. grain (i.e., sales) include YTD accumulated exports, as well as MY 2024/25 purchase commitments that have not yet shipped—i.e., "outstanding sales."

The April ***World Agricultural Supply and Demand Estimates (WASDE) report*** projects U.S. corn exports for MY 2024/25 at 64.8 million metric tons (mmt)—2.5 mmt (4 percent) higher than WASDE's March forecast, based on the pace of sales and shipments. If realized, this volume will be the largest since MY 2021/22. As of April 3, total commitments (outstanding sales plus accumulated exports) were up 25 percent from MY 2023/24. Representing future transportation demand, 18.5 mmt (34 percent) of total commitments remained unshipped, and the unshipped volume was up 19 percent from last year (**fig. 2**, **GTR table 15**).

As of April 3, the three-largest buyers of U.S. corn—Mexico, Japan, and Colombia—accounted for 34 percent, 19 percent, and 12 percent, respectively, of accumulated U.S. corn exports. Also, as of April 3, total commitments from MY 2023/24 to MY 2024/25, were up 3 percent to Mexico, up 17 percent to Japan, and up 28 percent to Colombia.

Mexico continued to be a strong buyer of U.S. corn, partly reflecting the toll of 2 consecutive years of drought on the country's domestic production. Colombia rose to the place of third-largest buyer of U.S. corn mainly **because of** Colombia's declining domestic production, rising demand from the country's feed industry, and facilitated access to U.S. corn under the U.S.-Colombia Trade Promotion Agreement (CTPA): in MY 2022/23, a 12-year tariff-rate quota (TRQ) negotiated under the CTPA ended, allowing unlimited volumes of U.S. corn to enter Colombia duty-free.

Becoming the fifth-largest buyer of U.S. corn (after Korea), the European Union (EU) secured YTD U.S. total commitments of 2.9 mmt—the highest level in the last decade and up almost 93 times from last year. The EU's low domestic production (second lowest in the past 15 years), contributed to the increase. The EU's purchases of U.S. corn—mainly driven by Spain—**were the highest in 30 years,** not only because of low domestic production, but also because of reduced exportable supplies from Brazil and Ukraine.[2]

In recent years, China's status as an importer of U.S. corn has fallen considerably. Among the top five importers from MY 2021/22 to MY 2023/24, China was the second-largest importer of U.S. corn in MY 2021/22 and MY 2022/23 and fourth largest in MY 2023/24. Yet, as of April 3 this year—at 33,000 metric tons—China's YTD imports of U.S. corn were almost nonexistent.

As of April 3, with a little less than 5 months until the end of the marketing year, 56 percent of projected U.S. corn sales were shipped, up 7 percent from same time last year, indicating the fast pace of shipments. Of U.S. corn exports sold to Mexico, Japan, and Colombia (as of April 3), 10.2 mmt remained unshipped—representing potential future transportation demand. These outstanding sales were up 5 percent from the same period in MY 2023/24.

U.S. corn will remain very competitive until June when Brazil's second crop of Safrina corn comes on the market. The rising transportation demand is also reflected in YTD corn inspections (as reported by USDA's Federal Grain Inspection Service), which are up from the same time last year by 38 percent (**GTR table 18**).

Soybean Export Sales Up From MY 2023/24

From MY 2023/24 to MY 2024/25, U.S. soybean exports rose in only one of the top five markets: Egypt (+299 percent) (**GTR table 16**). As of April 3, China remained the largest buyer of U.S. soybeans, but the country's MY 2024/25 total U.S. soybean commitments were down 5 percent from the same YTD period in MY 2023/24—displaced by China's purchases of Brazilian soybeans. U.S. exports to Mexico and Japan (currently, the third and fifth-largest buyers) also declined by 3 percent and 6 percent, respectively. In contrast, by April 3, U.S. soybean exports to the EU were up 19 percent from the same time last year, and the EU became the second-largest importer of U.S. soybeans, surpassing Mexico and Japan.

As of April 3, total soybean commitments and accumulated exports were up 14 percent and 12 percent, respectively, from the same time in MY 2023/24 (**fig. 2**). As of April 3, 84 percent of U.S. projected soybean exports had already shipped—up from 81 percent for the same YTD period last year. Outstanding U.S. soybean export sales were up 30 percent from the same time in MY 2023/24 (**fig. 1**).

2 On April 8, 2025, exporters reported a flash sale of .24 mmt of U.S. corn to Spain for delivery in the current marketing year. If realized, this sale could increase the demand for grain transportation.

If these sales materialize, they can increase grain transportation demand. Unlike U.S. corn, which is safe from Brazilian competition until June, U.S. soybean sales are undercut by the arrival of Brazil's soybean harvest to market this time of year. Typically, more than half of U.S. soybean shipments occur during a 4-month peak period—from September to December—which precedes Brazil's harvest.

Wheat Export Shipments Hit 4-Year High

According to the April *WASDE* report, total U.S. wheat exports (of all varieties) for MY 2024/25 are projected at 22.32 mmt—adjusted down from the March forecast by 0.41 mmt (mainly, because of less than expected sales of hard red spring and hard red winter wheat). If realized, this total would be up 16 percent from the 52-year low of the previous year and would mark the highest wheat exports in 4 years.

As of April 3, total commitments for U.S. wheat were up 13 percent from the same period in MY 2023/24, and accumulated exports were also up 13 percent (**fig. 2**, **GTR table 17**). This rise was mainly because of purchases by Mexico and Korea—up 24 percent and 76 percent, respectively, from last year. However, China's wheat purchases (like its corn and soybean purchases) fell sharply—down 94 percent from the same time last year. Still, China's substantially reduced purchases were not enough to erase the gains in U.S. exports to other countries. The gains were reflected in YTD wheat inspections: as of April 3, U.S. wheat inspections were up 19 percent from the same time last year (**GTR table 18**).

As of April 3, with 8 weeks left in wheat's marketing year, *WASDE* projected 77 percent of wheat exports had shipped—2 percent below the same time last year. Also, as of April 3, unshipped U.S. wheat exports totaled 4.2 mmt—up 16 percent from last year and up 36 percent from the 3-year average.

Grain Transportation Demand in MY 2024/25

So far, in MY 2024/25, higher corn and wheat exports have raised the demand for barge transportation. From September 7, 2024, to this April 5, MY 2024/25 barge movements through the Mississippi River locks rose 16 percent for corn from MY 2023/24. Similarly, from June 1, 2024, to this April 5, barge movements through the Mississippi River locks for wheat were up 16 percent from MY 2023/24. However, from September 7, 2024, to this April 5, barge movements for soybeans were down 5 percent. The decline may owe to multiple factors, including reduced soybean exports to China, uncertainty regarding U.S. trade policies, and available soybean inventories at grain elevators.

Rising wheat exports to Mexico also raised the demand for rail transportation. From June 1, 2024, to this April 3, inspections of wheat to Mexico by rail were up 21 percent from the previous year (**GTR fig. 4**). From September 1, 2024, to this April 3, inspection of soybeans to Mexico by rail were down 2 percent from the previous year, reflecting lower sales to Mexico. Likewise, for the week ending April 3, 30 oceangoing grain vessels were loaded in the Gulf—5 percent more than the same week last year. Within the next 10 days (starting April 4), 48 vessels were expected to be loaded—4 percent more than the same period last year (**GTR table 18**).

Looking Ahead

In the coming months, influences on U.S. exports and transportation demand will include key importers' decisions, as informed by shifting U.S. trade policies and those of purchasing countries. As of April 3, total unshipped export balances for all grain were significantly higher than the same period last year. As shares of total unshipped exports, volumes to Mexico were particularly strong—at 36 percent for corn, 23 percent for soybeans, and 22 percent for wheat. If these exports to Mexico materialize, they could raise the demand for rail and barge transportation. Other factors that could influence grain transportation patterns include increases in domestic soybean meal use, domestic ethanol production, and soybean oil exports.

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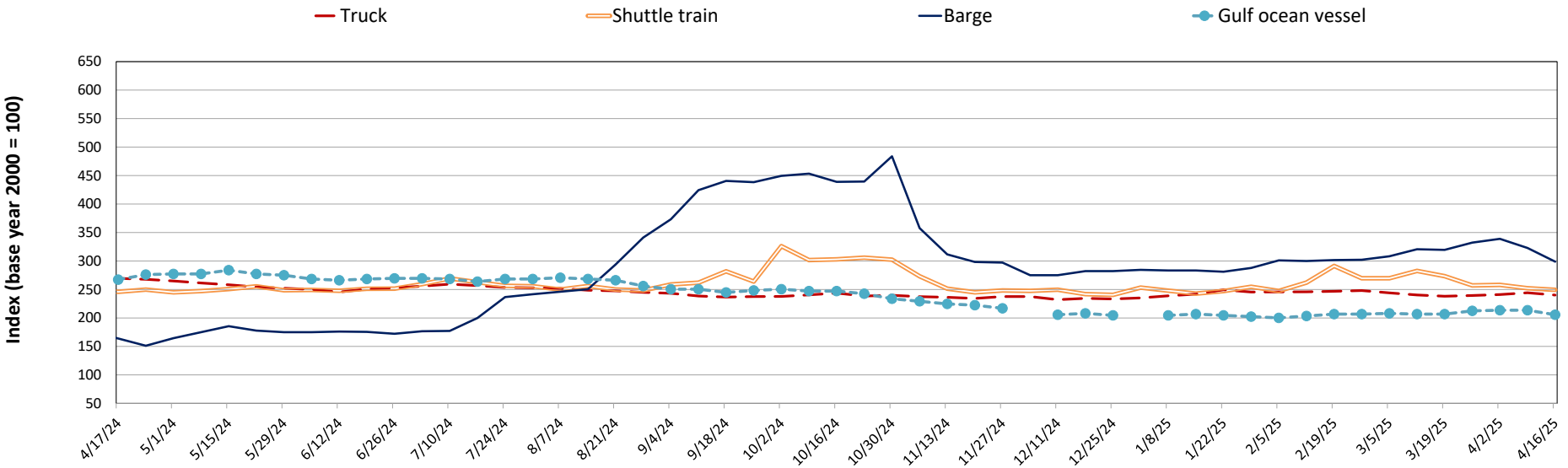
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
04/16/25	240	341	249	299	206	191
04/09/25	244	333	252	323	214	202
04/17/24	269	340	246	164	267	222

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.

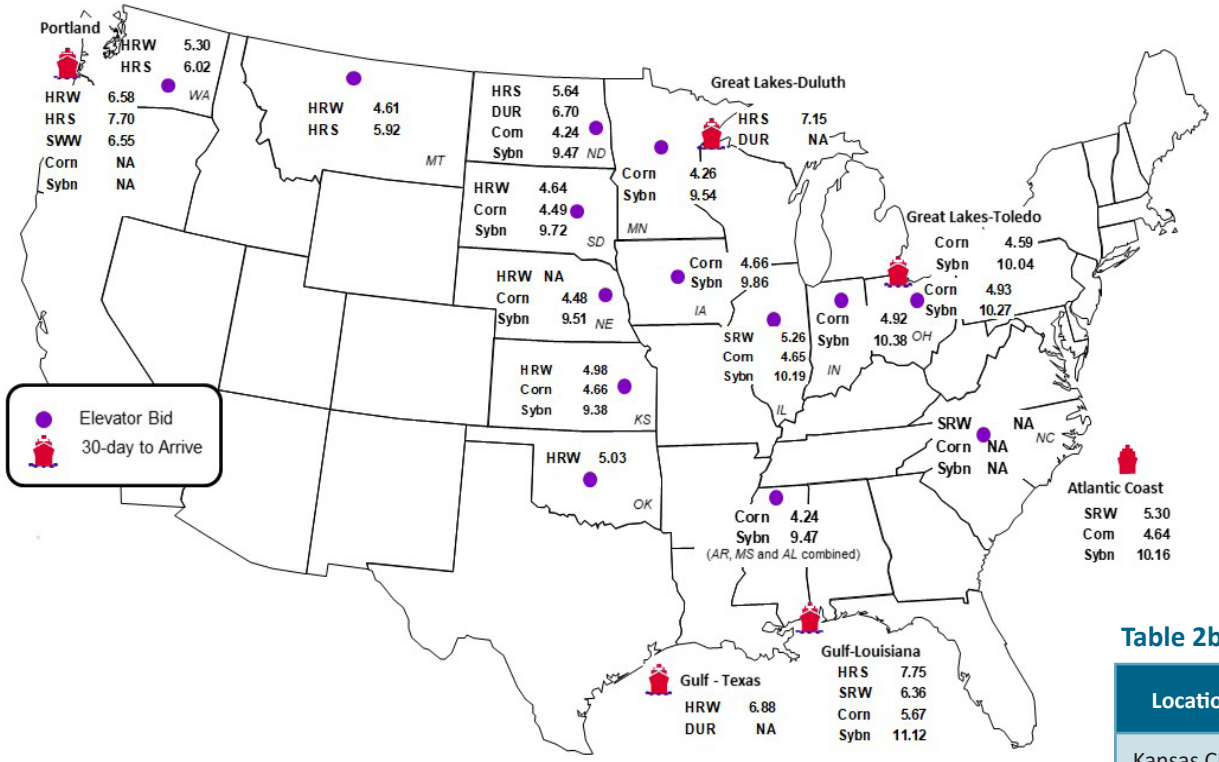
Figure 1. Grain transportation cost indicators as of week ending 4/16/25



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	4/11/2025	4/4/2025
Corn	IL–Gulf	-1.02	-1.02
Corn	NE–Gulf	-1.19	-1.20
Soybean	IA–Gulf	-1.26	-1.33
HRW	KS–Gulf	-1.90	-1.95
HRS	ND–Portland	-2.06	-2.06

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	4/11/2025	Week ago 4/4/2025	Year ago 4/12/2024
Kansas City	Wheat	May	5.582	5.630	5.866
Minneapolis	Wheat	May	6.150	5.844	6.426
Chicago	Wheat	May	5.490	5.366	5.500
Chicago	Corn	May	4.894	4.592	4.320
Chicago	Soybean	May	10.476	9.786	11.612

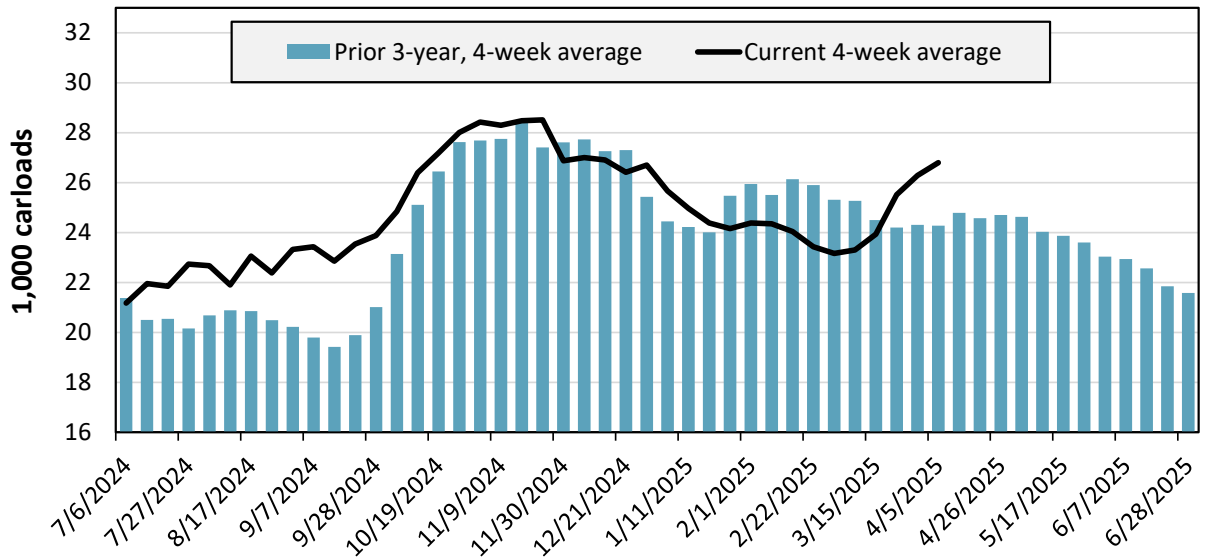
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 4/05/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,307	2,312	12,701	6,950	2,447	2,384	28,101
This week last year	1,790	2,767	11,842	5,601	3,179	1,114	26,293
2025 YTD	23,587	39,617	151,496	79,305	34,312	19,575	347,892
2024 YTD	23,379	37,950	150,214	75,051	42,217	14,987	343,798
2025 YTD as % of 2024 YTD	101	104	101	106	81	131	101
Last 4 weeks as % of 2024	98	108	107	103	92	186	106
Last 4 weeks as % of 3-yr. avg.	82	112	116	108	105	121	110
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 April 5, grain carloads were up 2 percent from the previous week, up 6 percent from last year, and up 10 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: 4/4/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	70.2	30.4	23.3	13.8	5.6	26.7	16.7	26.7
	Average over last 4 weeks	40.3	30.9	21.1	17.0	7.9	41.0	19.4	25.4
	Average of same 4 weeks last year	39.5	38.3	28.8	14.6	6.9	14.9	21.4	23.5
Grain unit train speeds (miles per hour)	This week	20.5	18.1	24.4	22.0	23.1	21.0	23.1	21.7
	Average over last 4 weeks	21.5	19.0	24.1	21.4	23.6	21.2	23.6	22.0
	Average of same 4 weeks last year	23.1	16.6	24.8	22.7	24.8	23.4	26.9	23.2

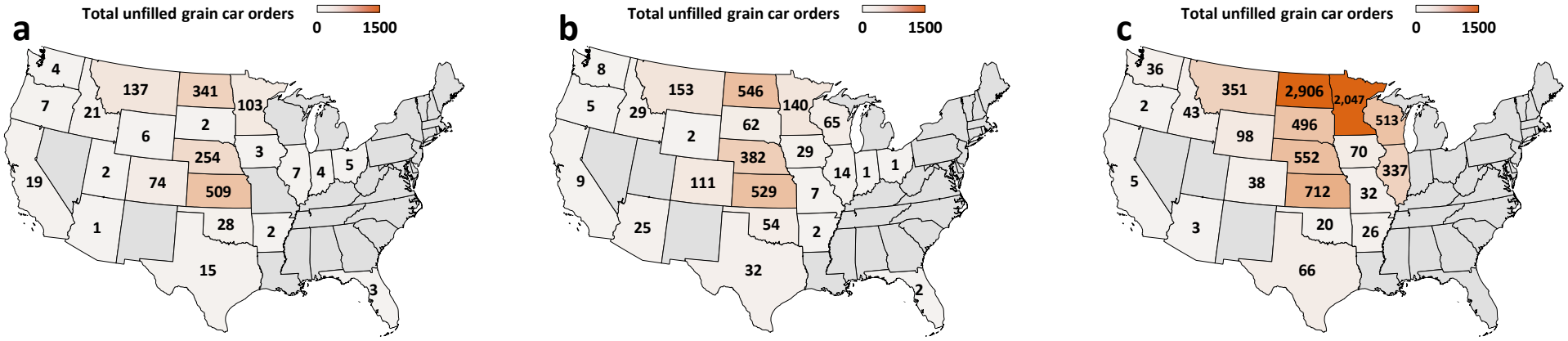
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 4/4/2025		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	37	9	264	100	12	73	4	499
	Average over last 4 weeks	64	9	296	100	10	62	5	545
	Average of same 4 weeks last year	32	8	509	89	2	40	19	698
Loaded grain cars not moved in over 48 hours (number)	This week	215	217	383	89	4	199	6	1,113
	Average over last 4 weeks	142	168	365	79	5	273	6	1,039
	Average of same 4 weeks last year	15	339	886	83	3	68	31	1,423
Grain unit trains held (number)	This week	0	0	10	5	1	3	3	21
	Average over last 4 weeks	1	0	16	8	1	4	2	31
	Average of same 4 weeks last year	1	3	18	4	0	3	6	34
Unfilled manifest grain car orders (number)	This week	12	5	282	844	0	404	0	1,547
	Average over last 4 weeks	5	5	516	1,116	0	567	50	2,259
	Average of same 4 weeks last year	1	4	6,891	716	0	740	34	8,385

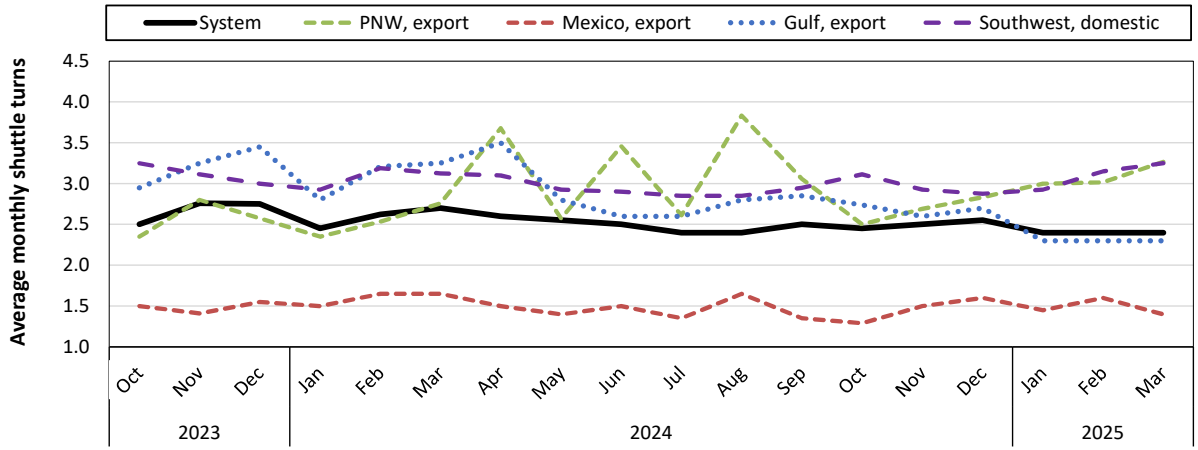
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 4/4/2025 (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

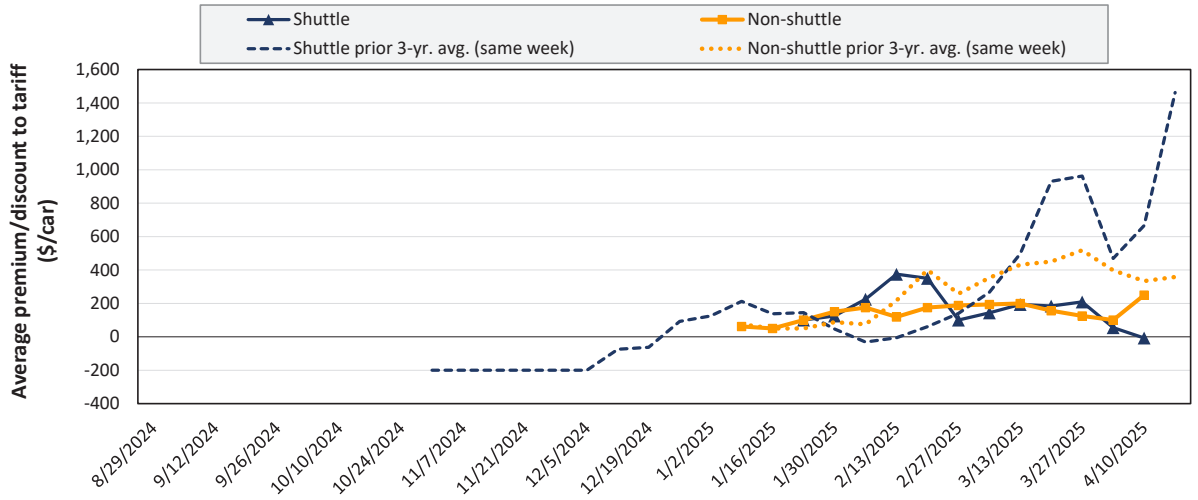


Average monthly systemwide grain shuttle turns for March 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.27 to PNW, 1.4 to Mexico, 2.3 to the Gulf, and 3.25 to the Southwest.

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



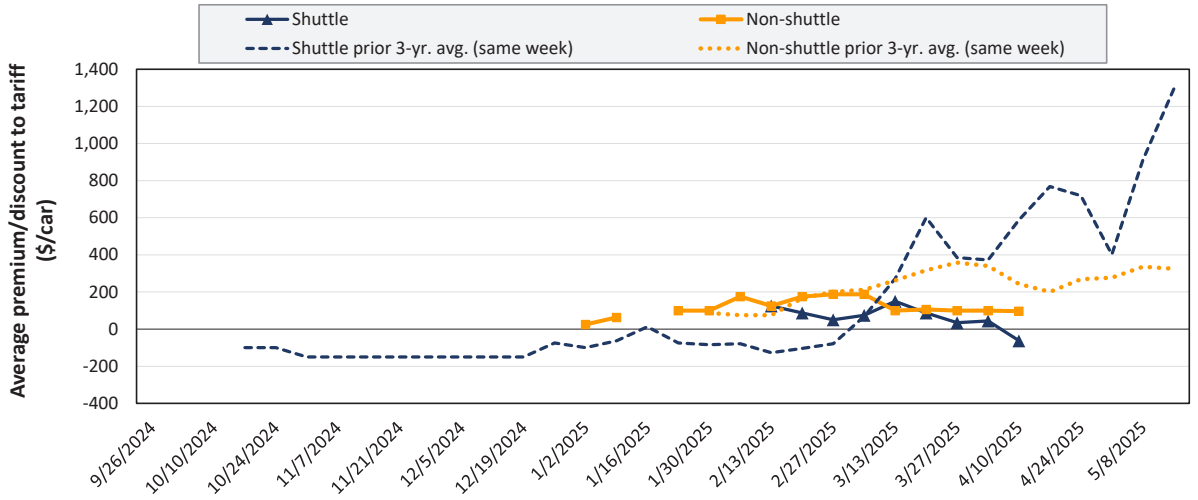
Average non-shuttle bids/offers rose $150 this week, and are at the peak.

Average shuttle bids/offers fell $63 this week and are $382 below the peak.

4/10/2025	BNSF	UP
Non-Shuttle	$250	n/a
Shuttle	$106	-$121

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



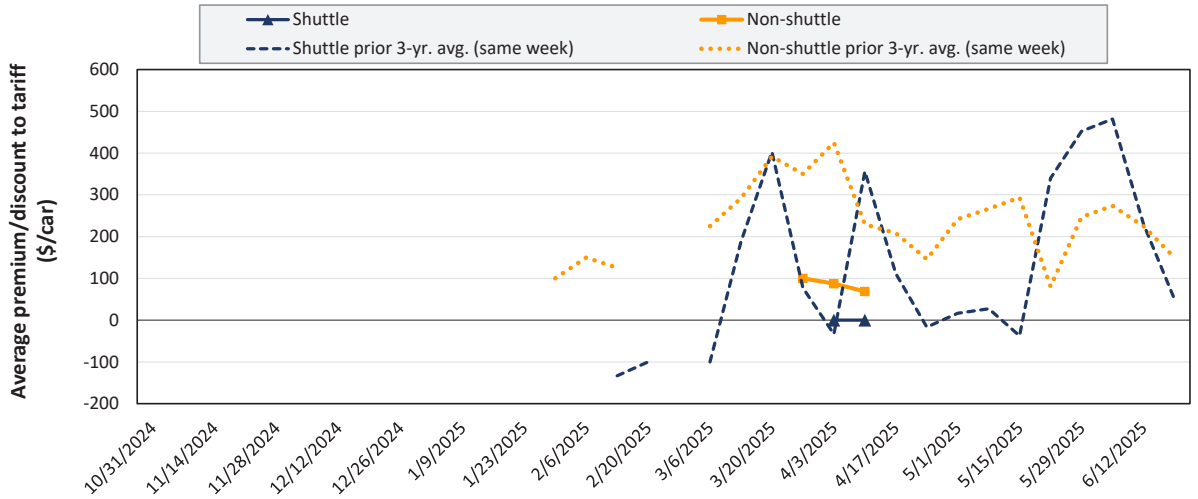
Average non-shuttle bids/offers fell $3 this week, and are $91 below the peak.

Average shuttle bids/offers fell $106 this week and are $213 below the peak.

4/10/2025	BNSF	UP
Non-Shuttle	$156	$38
Shuttle	$75	-$200

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



Average non-shuttle bids/offers fell $19 this week, and are $31 below the peak.

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

4/10/2025	BNSF	UP
Non-Shuttle	$100	$38
Shuttle	$0	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: 4/10/2025		Delivery period					
		Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Non-shuttle	BNSF	250	156	100	n/a	n/a	n/a
	Change from last week	137	43	0	n/a	n/a	n/a
	Change from same week 2024	-125	-44	-150	n/a	n/a	n/a
	UP	n/a	38	38	n/a	n/a	n/a
	Change from last week	n/a	-51	-38	n/a	n/a	n/a
	Change from same week 2024	n/a	-163	-163	n/a	n/a	n/a
Shuttle	BNSF	106	75	0	n/a	100	n/a
	Change from last week	-32	-13	0	n/a	0	n/a
	Change from same week 2024	106	69	63	n/a	275	n/a
	UP	-121	-200	n/a	n/a	n/a	n/a
	Change from last week	-94	-200	n/a	n/a	n/a	n/a
	Change from same week 2024	4	-200	n/a	n/a	n/a	n/a
	CPKC	100	100	-75	n/a	n/a	n/a
	Change from last week	200	-100	0	n/a	n/a	n/a
	Change from same week 2024	150	225	-125	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

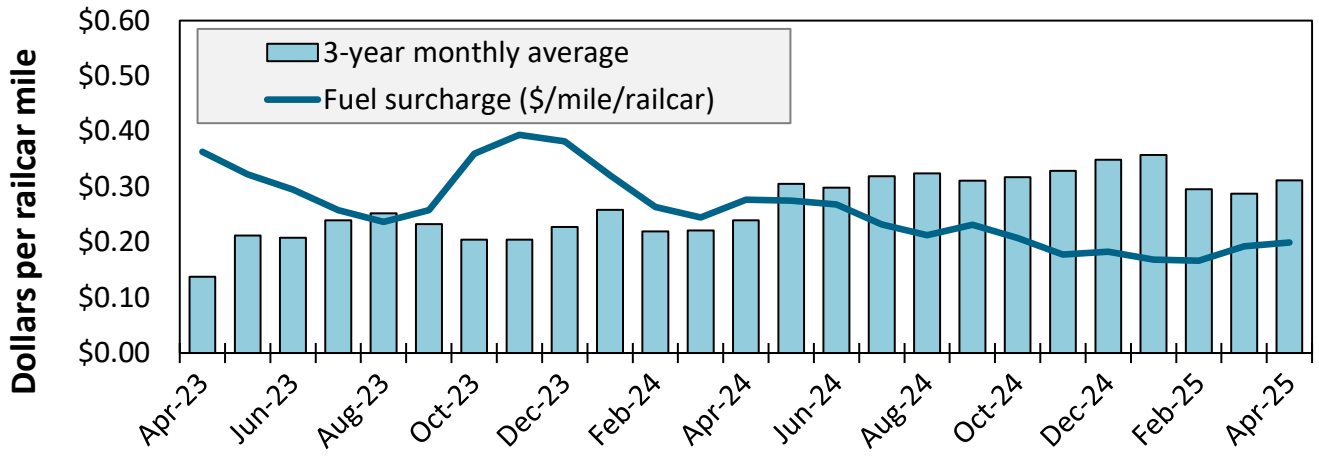
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel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

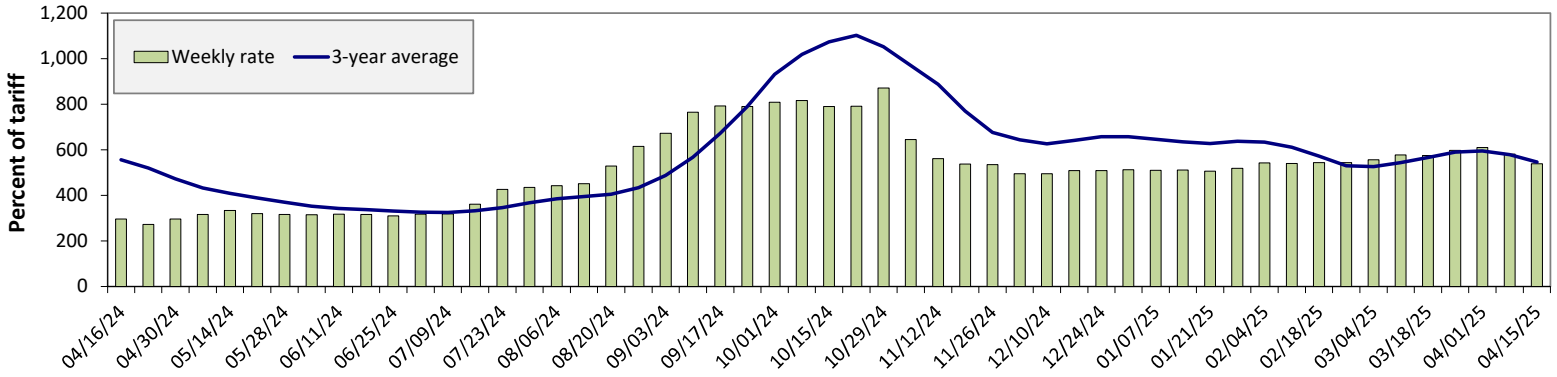
Figure 9. Railroad fuel surcharges, North American weighted average



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 15: 7 percent lower than the previous week; 82 percent higher than last year; and 1 percent lower than the 3-year average.

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year average.
Source: USDA, Agricultural Marketing Service.

Table 9. Weekly barge freight rates: southbound only

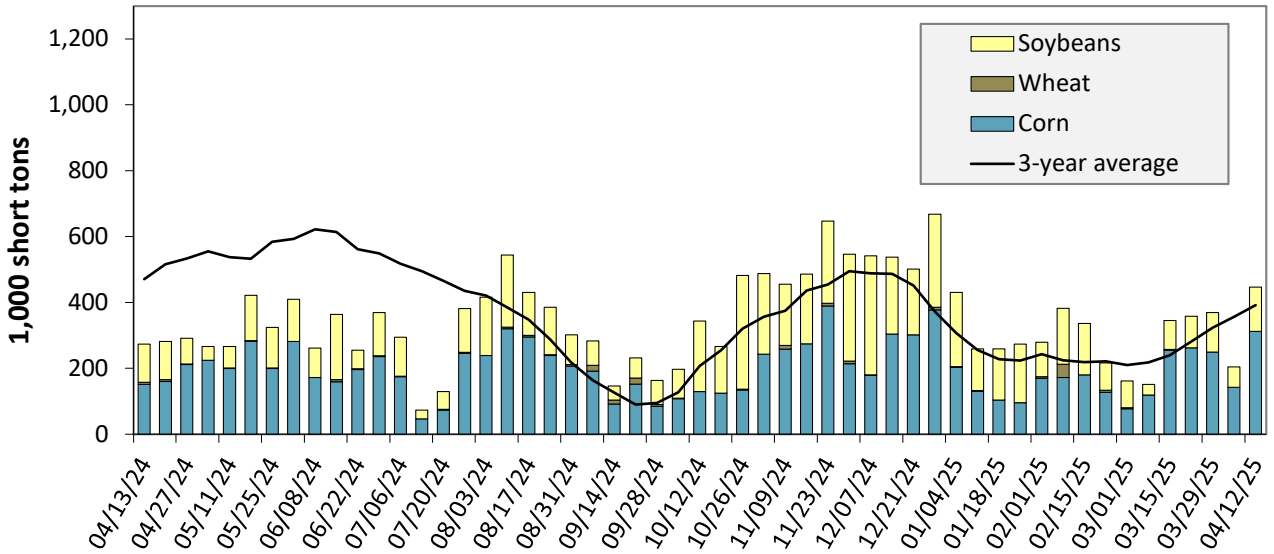
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	4/15/2025	600	573	538	397	392	348
	4/8/2025	609	610	581	404	394	348
$/ton	4/15/2025	37.14	30.48	24.96	15.84	18.38	10.93
	4/8/2025	37.70	32.45	26.96	16.12	18.48	10.93
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	83	89	82	83	59	64
	3-year avg.	1	2	-1	-6	-18	-7
Rate	May	557	484	453	341	344	308
	July	491	440	400	316	315	292

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 April 12: 63 percent higher than last year and 14 percent higher than the 3-year average.

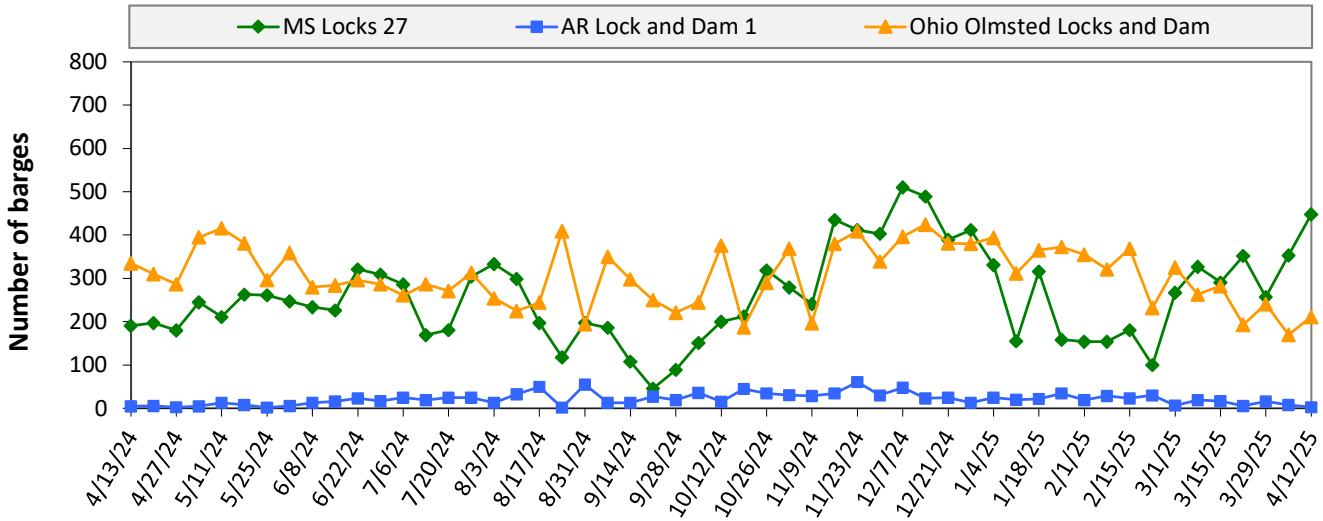
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 04/12/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	69	0	31	0	100
Mississippi River (Winfield, MO (L25))	132	0	27	0	159
Mississippi River (Alton, IL (L26))	283	0	117	0	400
Mississippi River (Granite City, IL (L27))	312	0	134	0	447
Illinois River (La Grange)	125	0	29	0	153
Ohio River (Olmsted)	66	0	50	0	116
Arkansas River (L1)	0	0	0	0	0
Weekly total - 2025	378	0	185	0	562
Weekly total - 2024	242	90	166	2	500
2025 YTD	4,665	265	3,380	75	8,386
2024 YTD	3,515	531	3,922	68	8,036
2025 as % of 2024 YTD	133	50	86	111	104
Last 4 weeks as % of 2024	111	27	87	187	94
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.

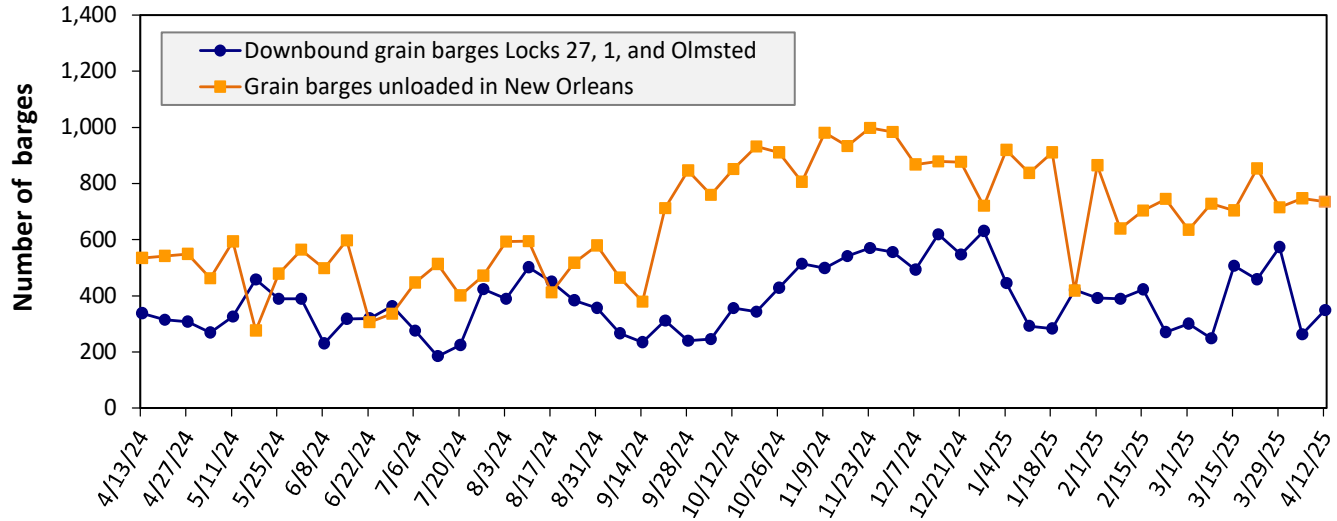
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending April 12: 662 barges transited the locks, 131 barges more than the previous week, and 6 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 April 12: 349 barges moved down river, 86 more than the previous week; 735 grain barges unloaded in the New Orleans Region, 2 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.

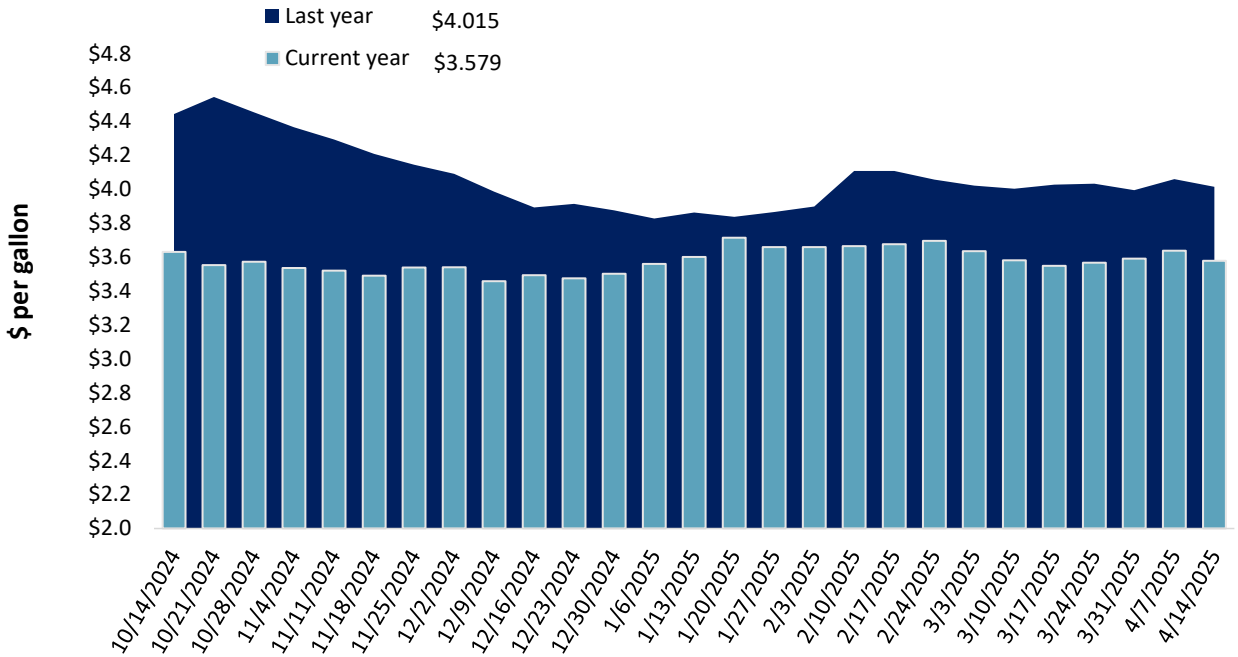
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 4/14/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.660	-0.053	-0.408
	New England	3.962	-0.044	-0.349
	Central Atlantic	3.856	-0.027	-0.385
	Lower Atlantic	3.556	-0.064	-0.423
II	Midwest	3.510	-0.069	-0.455
III	Gulf Coast	3.267	-0.071	-0.443
IV	Rocky Mountain	3.480	-0.019	-0.476
V	West Coast	4.281	-0.037	-0.421
	West Coast less California	3.833	-0.043	-0.385
	California	4.797	-0.030	-0.459
Total	United States	3.579	-0.060	-0.436

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 April 14, the U.S. average diesel fuel price decreased 6.0 cents from the previous week to $3.579 per gallon, 43.6 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 4/3/2025	1,262	490	1,220	1,180	84	4,236	18,495	4,679	27,410
	This week year ago	824	929	1,144	743	25	3,664	15,600	3,590	22,855
	Last 4 wks. as % of same period 2023/24	190	80	128	181	317	144	133	145	136
Current shipped (cumulative) exports sales	2024/25 YTD	4,083	2,658	5,521	4,577	272	17,111	36,525	41,663	95,299
	2023/24 YTD	2,786	3,460	5,266	3,173	479	15,164	28,576	37,207	80,947
	YTD 2024/25 as % of 2023/24	147	77	105	144	57	113	128	112	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 June 1 to May 31 and, for corn and soybeans, September 1 to August 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 4/03/2025	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	19,282	18,659	3	17,746
Japan	9,199	7,866	17	9,366
China	33	2,060	-98	8,233
Colombia	5,637	4,415	28	4,383
Korea	4,043	1,712	136	1,565
Top 5 importers	38,194	34,712	10	41,293
Total U.S. corn export sales	55,019	44,177	25	51,170
% of YTD current month's export projection	85%	76%	-	-
Change from prior week	786	326	-	-
Top 5 importers' share of U.S. corn export sales	69%	79%	-	81%
USDA forecast April 2025	64,773	58,220	11	-
Corn use for ethanol USDA forecast, April 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 (September 1 – August 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 4/03/2025	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	22,264	23,524	-5	28,636
Mexico	4,215	4,326	-3	4,917
Japan	1,672	1,784	-6	2,231
Egypt	2,651	664	299	2,228
Indonesia	1,424	1,432	-1	1,910
Top 5 importers	32,225	31,730	2	39,922
Total U.S. soybean export sales	46,343	40,797	14	51,302
% of YTD current month's export projection	93%	88%	-	-
Change from prior week	172	305	-	-
Top 5 importers' share of U.S. soybean export sales	70%	78%	-	78%
USDA forecast, April 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 (September 1 – August 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 4/03/2025	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	3,982	3,206	24	3,298
Philippines	2,597	2,824	-8	2,494
Japan	2,108	1,953	8	2,125
China	139	2,163	-94	1,374
Korea	2,373	1,345	76	1,274
Taiwan	1,010	1,099	-8	921
Nigeria	713	243	194	920
Thailand	888	460	93	552
Colombia	451	295	53	522
Vietnam	570	417	37	313
Top 10 importers	14,829	14,006	6	13,792
Total U.S. wheat export sales	21,347	18,828	13	18,323
% of YTD current month's export projection	96%	98%	-	-
Change from prior week	107	81	-	-
Top 10 importers' share of U.S. wheat export sales	69%	74%	-	75%
USDA forecast, April 2025	22,317	19,241	16	-

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.

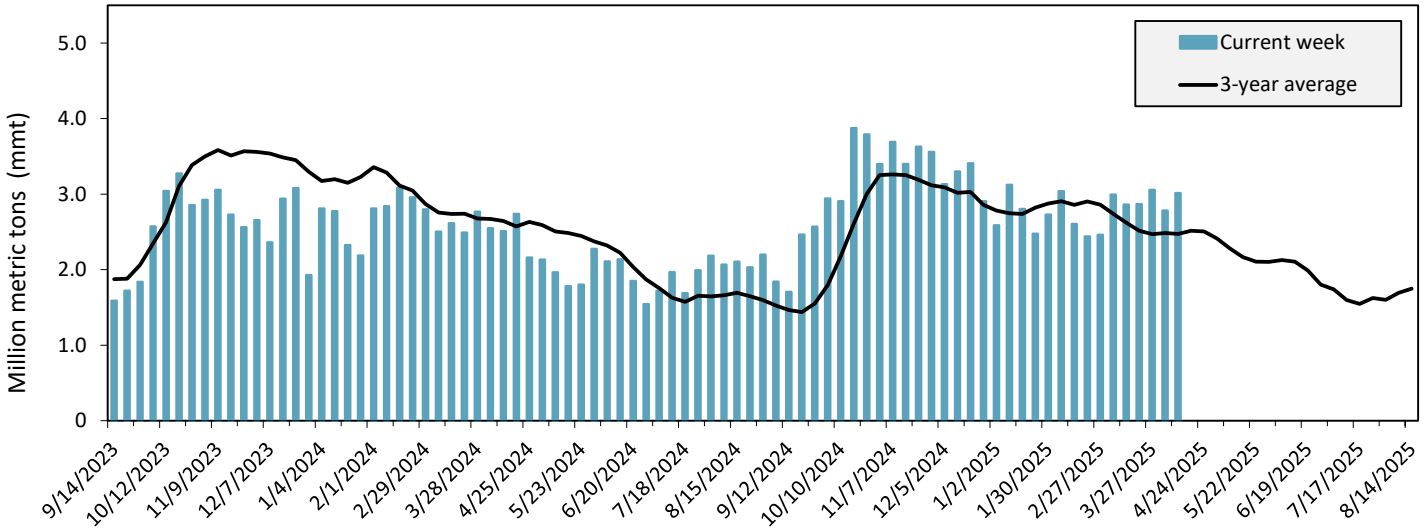
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 04/10/2025	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	597	621	96	7,047	5,158	137	106	173	13,987
	Soybeans	0	67	0	1,724	2,458	70	330	167	10,445
	Wheat	231	149	155	2,834	2,942	96	74	96	11,453
	All grain	829	856	97	11,693	11,220	104	101	132	37,186
Mississippi Gulf	Corn	867	637	136	10,670	6,990	153	144	112	27,407
	Soybeans	408	600	68	8,326	9,190	91	138	121	29,741
	Wheat	103	113	91	1,029	1,730	60	75	112	4,523
	All grain	1,378	1,350	102	20,026	17,965	111	132	114	61,789
Texas Gulf	Corn	0	0	n/a	105	141	74	25	23	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	153	40	384	884	456	194	237	206	1,940
	All grain	153	40	384	1,180	1,869	63	105	95	6,965
Interior	Corn	335	356	94	3,432	3,742	92	104	136	13,463
	Soybeans	136	143	95	1,864	2,328	80	92	102	8,059
	Wheat	117	21	546	825	787	105	137	141	2,952
	All grain	621	520	119	6,226	6,952	90	105	128	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	11	0	33	49	68	58	71	653
	All grain	0	11	0	33	49	68	58	26	1,060
Atlantic	Corn	29	0	n/a	122	124	98	199	213	410
	Soybeans	3	5	53	421	415	102	64	13	1,272
	Wheat	0	0	n/a	0	10	0	n/a	n/a	73
	All grain	32	5	605	542	549	99	112	39	1,754
All Regions	Corn	1,829	1,613	113	21,375	16,155	132	120	132	56,109
	Soybeans	546	814	67	12,544	14,445	87	137	116	50,865
	Wheat	604	335	180	5,605	5,974	94	94	118	21,594
	All grain	3,013	2,783	108	39,804	38,657	103	115	118	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.

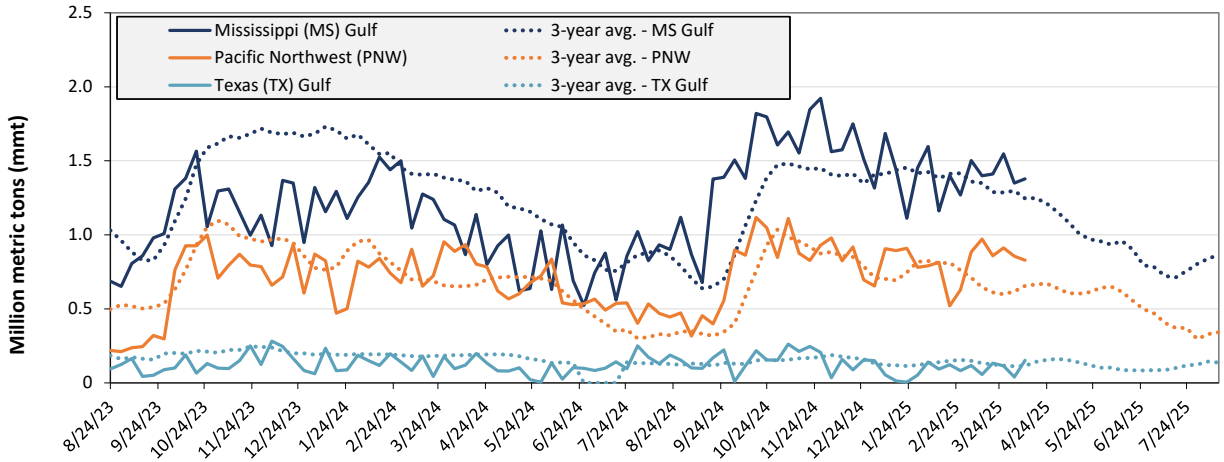
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Apr. 10: 3 mmt of grain inspected, up 8 percent from the previous week, up 21 percent from the same week last year, and up 22 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 04/10/25 inspections (mmt):
MS Gulf: 1.38
PNW: 0.83
TX Gulf: 0.15

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 2	up 284	up 10	down 3
Last year (same 7 days)	up 59	up 85	up 61	down 13
3-year average (4-week moving average)	up 11	up 33	up 13	up 26

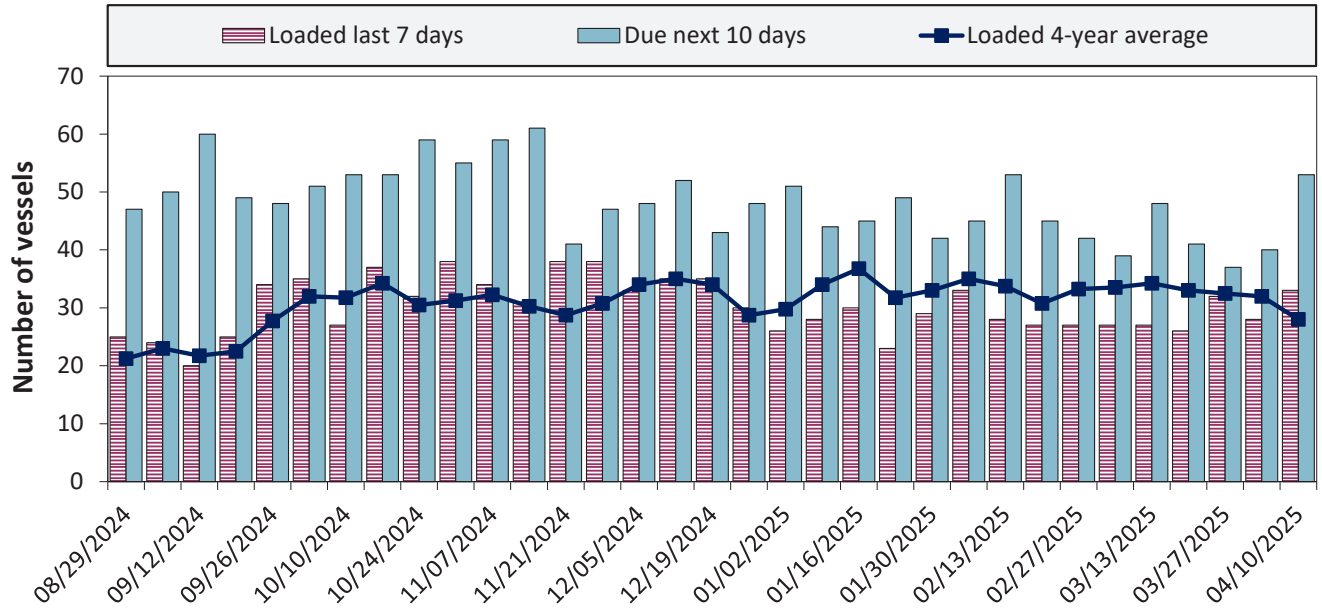
Source: USDA, Federal Grain Inspection Service.

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
4/10/2025	24	33	53	21
4/3/2025	31	28	40	15
2024 range	(11…45)	(18…38)	(29…61)	(3…25)
2024 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.
Source: USDA, Agricultural Marketing Service.

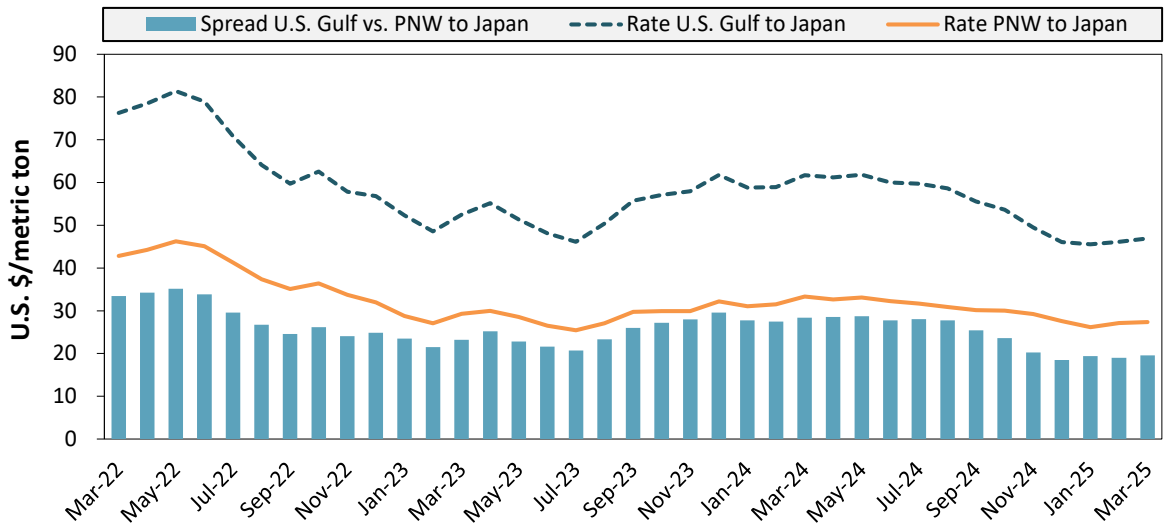
Figure 19. U.S. Gulf vessel loading activity



Week ending 04/10/25, number of vessels	Loaded	Due
Change from last year	50%	29%
Change from 4-year average	18%	18%

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.

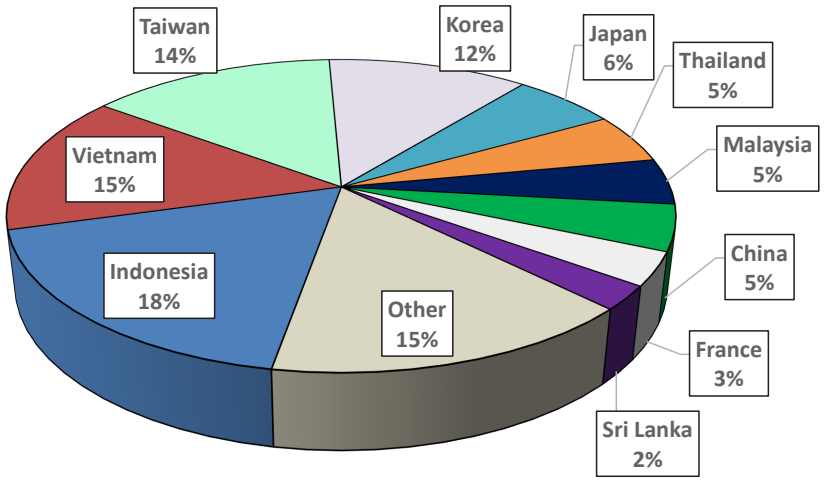
Table 20. Ocean freight rates for selected shipments, week ending 4/12/2025

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	Colombia	Wheat	Feb 25, 2025	Mar 15/25, 2005	33,400	89.01
PNW	Japan	Corn	Apr 8, 2025	May 1/10, 2025	60,000	36.85
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	Corn	Apr 2, 2025	Apr 5, 2025	65,000	35.00
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	Apr 9, 2025	May 2/11, 2025	63,000	32.00
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

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.

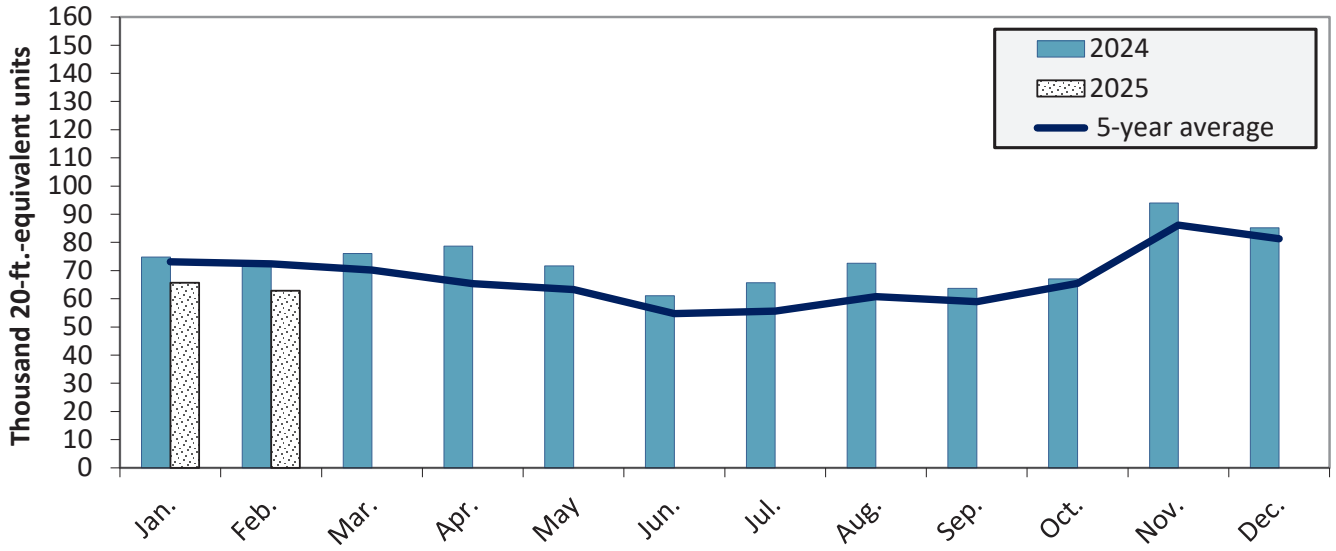
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Feb 2025



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 Feb. 2025 were down 12.1 percent from last year and down 13.1 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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