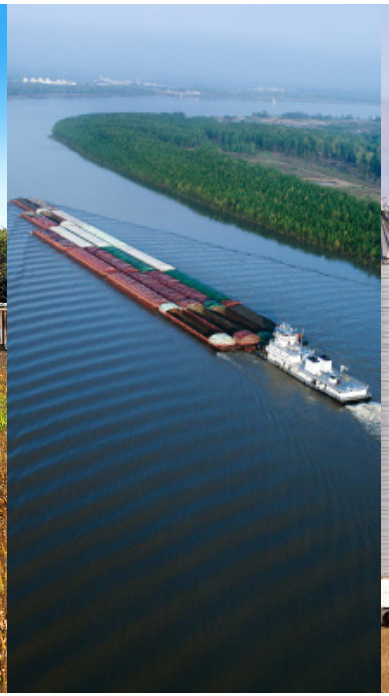
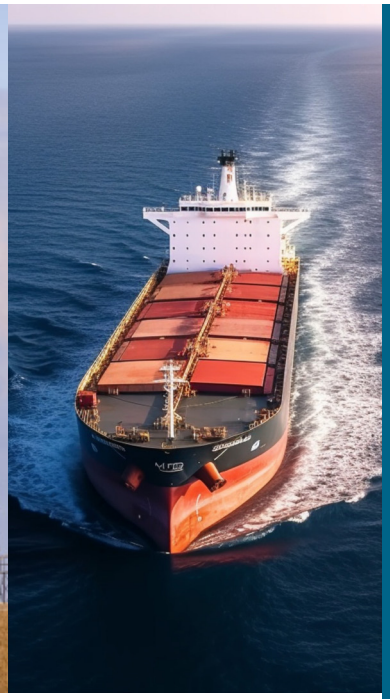
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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www.ams.usda.gov/GTR

USTR Announces Fees on Chinese Operators and Chinese-Built Ships. On April 17, the Office of the U.S. Trade Representative (USTR) **announced** actions intended to restore U.S. shipbuilding and counter China's unfair dominance of the shipbuilding sector, while "limiting disruption for U.S. exporters."

Beginning on October 14, Chinese-operated vessels arriving at U.S. ports will be assessed $50 per net ton, and Chinese-built vessels will incur a fee of $18 per net ton (or $120 per container). These fees will rise incrementally over 3 years. Chinese-built bulk vessels will not incur a fee if they arrive empty or if their capacity is less than 80,000 deadweight tons. Also, if a vessel makes more than one U.S. port call, the fee will be assessed only once.

These fees are scaled back from USTR's earlier proposal (***Grain Transportation Report (GTR), February 27, 2025, second highlight***). U.S. Wheat Associates and the National Association of Wheat Growers **welcomed USTR's adjustments**—noting that USTR's original proposal would have "significantly increased export costs for U.S. wheat."

ASCE Releases 2025 Infrastructure Report Card ... The American Society of Civil Engineers' (ACSE) newly released quadrennial 2025 "**Report Card for America's Infrastructure**" comprehensively assesses current infrastructure condition and needs across 18 categories, including ports, inland waterways, rail, roads, and bridges. Working with an A to F scale, the report upgraded the overall condition of U.S. infrastructure to a C grade—up from C– in 2021. C is the highest grade received for the overall condition of U.S. infrastructure since ASCE began its assessment in 1998.

From 2021 to 2025, grades improved for three categories: inland waterways (from D+ to C–); ports (from B– to B); and roads (from D to D+). However, over the same period, grades fell for rail (from B to B–) and were unchanged for bridges at C. Of all categories, ports received the highest grade, reflecting the results of Federal investments that almost doubled their annual port funding.

... Shows Funding for Roads and Bridges Still Lags Needs. Despite fewer roads in poor condition (39 percent in 2025, down from 43 percent in 2021), ACSE estimates roads have a $684 billion funding gap over the next 10 years. Of bridges, the number in fair condition (49.1 percent) surpass those in good condition (44.1 percent), and ASCE estimates $191 billion in additional funding will be needed to rehabilitate bridges in poor condition.

According to the 2024 **National Bridge Inventory Data**, Iowa and South Dakota had the highest shares of bridges in poor condition—22.8 percent and 21 percent, respectively. Next were North Dakota (14.8 percent); Nebraska (10.7 percent); Missouri (10.5 percent); and Illinois (10.5 percent). All of these States are major grain producers.

Mississippi Raises Fuel Taxes for First Time Since 1987. Effective July 1, Mississippi will **implement** the first of three annual 3-cent hikes in gas and diesel excise taxes levied on licensed distributors and businesses that sell motor fuel. Currently, through June 30, the Mississippi Department of Revenue charges these businesses an excise tax of 18 cents per gallon on undyed diesel, gasoline, ethanol, gasohol, and undyed biodiesel.

The new increases to motor fuel taxes will take place over the next 3 years. Starting July 1, taxes on diesel, gas and the other special fuels (such as biodiesel, propane) will rise 3 cents, to 21 cents a gallon; then, to 24 cents per gallon the following year; and to 27 cents a gallon the year after that (2027).

Of the revenue from the increases, 23.25 percent will help the State's 82 counties build and maintain secondary, non-State-owned roads and bridges. Another 2.75 percent of the revenue will feed the Strategic Multi-Modal Investments Fund, created in 2023 to boost freight capacity and economic growth at Mississippi's airports, ports, and railroads.

*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 10, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 26.52 million metric tons (mmt), down 3 percent from last week and up 25 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.56 mmt, up 99 percent from last week. Net **soybean export sales** were 0.56 mmt, up 222 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.08 mmt, down 29 percent from last week.

Rail

U.S. Class I railroads originated 28,263 **grain carloads** during the week ending April 12. This was a 1-percent increase from the previous week, 19 percent more than last year, and 12 percent more than the 3-year average.

Average April **shuttle secondary railcar bids/offers** (per car) were $113 below tariff for the week ending April 17. This was $105 less than last week and $138 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $300 above tariff. This was $50 more than last week and unchanged from this week last year.

Barge

For the week ending April 19, **barged grain movements** totaled 469,468 tons. This was 17 percent less than the previous week and 1 percent more than the same period last year.

For the week ending April 19, 352 grain barges **moved down river**—3 more than last week. There were 575 grain barges **unloaded** in the New Orleans region, 22 percent fewer than last week.

Ocean

For the week ending April 17, 34 **oceangoing grain vessels** were loaded in the Gulf—21 percent more than the same period last year. Within the next 10 days (starting April 18), 33 vessels were expected to be loaded—6 percent fewer than the same period last year.

As of April 17, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $45.25, down 2 percent from the previous week. The rate from the Pacific Northwest to Japan was $26.75 per mt, down 1 percent from the previous week.

Fuel

For the week ending April 21, the U.S. average **diesel price** decreased 4.5 cents from the previous week, to $3.534 per gallon—45.8 cents below the same week last year.

Grain Transportation Update: Strong Corn Exports Propel Transportation Demand

As in fourth quarter 2024 (*Grain Transportation Report (GTR), January 23, 2025*), demand for grain transportation remained strong in first quarter 2025—owing to robust corn exports. However, as is typical in the first quarter, winter weather proved challenging at times and led to delays.

First-quarter downbound barged shipments of grain were above the prior-3-year average, driven by U.S. Gulf corn exports.[1] Although rail grain carloads were slightly below average at the national level, record corn exports from Pacific Northwest (PNW) export terminals suggested higher carloads for this key export lane. Although ocean freight rates fell and vessel loadings were steady in the first quarter, the market faced uncertainty from proposed port fees from the Office of the United States Trade Representative.

Corn "Disappearance" Spurred by Strong Export Demand

As shown in USDA/National Agricultural Statistics Service's latest *Grain Stocks* report, total demand for grain transportation was strong from December 2024 through this February. During that period, total grain "disappearance" (i.e., for corn, soybeans, and wheat) was 3 percent above last year and average.[2] Above-average disappearance can be explained by corn—up 6 percent from average. By State, notable increases in corn disappearance occurred in North Dakota (up 68 percent from average) and Illinois (up 11 percent from average). Despite strong corn demand, soybean and wheat disappearance were below average (down 3 percent and 4 percent, respectively).

Corn disappearance was driven by strong exports. According to USDA/Foreign Agricultural Service's Global Agricultural Trade System, the United States exported 17.6 million metric tons (mmt) of corn from December 2024 through this February—a record high for that time period. At 4.9 mmt, corn exports from PNW terminals were especially strong—up 100 percent from average (GTR, March 13, 2025, first highlight).

Rail Volumes Slightly Down Amid Severe Weather

In first quarter 2025, rail grain carloads were up 1 percent from the same period in 2024, but down 2 percent from average. First-quarter grain carloads were down for all U.S. Class I railroads, except for Norfolk Southern Railway (NS)—which was up 12 percent from average.

By State, grain cars loaded and billed in the first quarter were down significantly from average in Iowa (–12 percent); Illinois (–22 percent); Kansas (–41 percent); Minnesota (–25 percent); Nebraska (–13 percent); and Ohio (–34 percent). Notable increases occurred in Michigan (+34 percent); North Dakota (+23 percent); and South Dakota (+26 percent).

The increases in the Dakotas reflect strong PNW export demand. Declines in other States likely reflect lower domestic feed demand, especially in the Texas Panhandle (the leading destination for rail corn carloads). From January to March, feeder cattle placements in Texas feedlots were 925,000—19 percent below average (GTR, April 3, 2025, second highlight).

Rail service was challenged by severe weather in February. February's extreme cold especially affected BNSF Railway (BNSF), whose Northern Transcon line traverses Minnesota, North Dakota, Montana, Idaho, and Washington. For example, origin dwell times for BNSF grain trains averaged 87.5 hours at the end of February—just short of an all-time weekly high. Similarly, the number of loaded and empty grain cars not moved in over 48 hours on BNSF's network rose from 1,160 at the start of 2025 to over 3,500 for the week ending February 21.

Reflecting these service challenges, BNSF secondary market shuttles for delivery in the second half of February averaged around $2,000 per car. However, BNSF's service

1 Unless otherwise noted, "average" (as referring to a historical average) specifically denotes the "prior 3-year average."
2 "Disappearance" refers to the drawdown in national grain supplies from December 1 to March 1.

improved during March, and shuttles for delivery in the second half of March averaged $750 per car. By the end of the month, origin dwell times for BNSF grain trains averaged 21 hours, and the number of loaded and empty grain cars not moved in over 48 hours totaled just 600, well below average.

In February, as flooding challenged railroads in the Eastern United States, NS faced flash flooding on its Heartland Corridor—a key route for grain transportation (**GTR, February 20, 2025, second highlight**). More recently (in early April), in the Mid-South, flooding snarled operations of BNSF, Canadian National Railway (CN), CSX Transportation, and NS (**GTR, April 10, 2025, second highlight**).

Despite first-quarter rail grain carloads slightly lagging the average, carloads have been above average in recent weeks (**GTR fig. 3**). Most notably, CN achieved an all-time weekly record of 2,384 originated grain carloads in the week ending April 5 (**GTR, April 17, 2025, first highlight**)—despite being 10 percent below average for the first quarter.

Barge Spot Rates Rose With Strong Corn Export Demand and Traffic Delays

For first quarter 2025, downbound barged grain shipments through the Mississippi River System (MRS) locks totaled 7.5 million tons—up 5 percent from last year and up 1 percent from average (**GTR table 10**). That slight rise from average reflected a rise in corn shipments for export (up 18 percent from average). However, soybean and wheat barged volumes were below average (down 11 percent and 33 percent, respectively).

So far this year, grain shipments have been above average on the Illinois River and below average on the Ohio River. For first quarter 2025, downbound grain shipments through the LaGrange Lock and Dam on the Illinois River (Versailles, IL) were up 32 percent from average. Downbound grain shipments through the Olmsted Lock and Dam on the Ohio River (Olmsted, IL) were down 12 percent.

Winter storms and high water posed challenges in January and February, and high water has continued causing delays in spring. In late January, a rare winter storm disrupted barges unloading in New Orleans (**GTR, January 30, 2025, first highlight**). In February, winter storms, freezing temperatures, and high water to the north caused delays throughout the MRS (**GTR, February 20, 2025, first highlight**).

In recent weeks, more delays have come from flooding on the Ohio River and lower Mississippi River (**GTR, April 17, 2024, second highlight**). Besides weather, unanticipated repairs also delayed the reopening of two Mid-Mississippi River locks—Lock and Dam 27 (near St. Louis, MO) and Melvin Price Lock and Dam (Alton, IL). Both locks are now fully operational.

Reflecting strong export demand and periodic river delays, spot rates were above average in the first quarter. The first quarter 2025 average barge rate at St. Louis, MO, ($16.80 per ton) was 36 percent higher than last year ($12.36 per ton) and 10 percent more than the 3-year average ($15.25 per ton).

Along the Columbia-Snake River System (CSRS), 905,000 tons of wheat moved through the locks in first quarter 2025—up 137 percent from first quarter 2024 (**GTR table 12**). The large rise in CSRS wheat shipments reflected an **extended closure of the CSRS** locks in 2024 (for maintenance) and a rise in soft white wheat exports this year. In first quarter 2025, barge rates at Lewiston, ID, averaged $21.47 per ton—up 2 percent from first quarter 2024 despite lower fuel costs (**GTR table 11**).

Seasonal Dip and Market Uncertainties Lowered Dry Bulk Ocean Freight Rates

In first quarter 2025, ocean freight rates for shipping bulk grain were down from the previous quarter, down from first quarter 2024, and down from the 4-year average. The rates for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan averaged $46.19 in first quarter 2025—down 7 percent from the previous quarter, down 23 percent from a year ago, and 21 percent below the prior 4-year average (**GTR fig. 20**). The rate from the Pacific Northwest averaged $26.89 per mt—down 7 percent from the previous quarter, down 16 percent from a year ago, and 16 percent below the prior 4-year average.

Ocean freight rates remained low in first quarter 2025, because of an ample supply of vessels and seasonally low demand caused by

holidays around the world, including the Chinese Lunar New Year celebration (January 28 to February 3). In addition, geopolitical and economic uncertainties may have contributed to market volatility.

For instance, on February 21, the Office of the United States Trade Representative (USTR) proposed a set of fees (of up to $1.5 million) on Chinese operators and Chinese-built vessels (**GTR, February 27, 2025, second highlight**). However, on April 17, USTR **scaled** back its earlier proposal by offering a 6-month grace period and by offering waivers for fees on Chinese-built vessels if they arrive empty or have a capacity of less than 80,000 deadweight tons. Chinese operators are still subject to a fee. For more details, see **this week's first highlight**.

Meanwhile, in the U.S. Gulf, grain vessel loading activity remained fairly stable, with an average of 33 oceangoing vessels at berth (loading and waiting to load) per week in the first quarter, unchanged from the same period in 2024. An average of 28 oceangoing vessels were loaded per week during the first quarter, compared to an average of 30 vessels during the same period in 2024 (**GTR fig. 19**).

Diesel Prices for Trucking Rose in First Quarter 2025

After steadily declining throughout 2024, U.S. diesel prices averaged $3.63 per gallon in first quarter 2025. That price was 10 cents above fourth quarter 2024, but 34 cents below first quarter 2024 (**GTR fig. 16**). From the week ending March 17 to the week ending April 7, the national diesel price increased 9.0 cents, before falling 10.5 cents in the last 2 weeks (from the week ending April 7 to the week ending April 21).

The Energy Information Administration's April ***Short-Term Energy Outlook*** projects crude oil prices will be volatile as shifting trade policies begin to affect the market. EIA projects Brent Crude oil prices to drop $68 per barrel in 2025, down $6 per barrel from the March forecast and down $13 per barrel from 2024. The drop stemmed from less projected growth in oil demand and more continued growth projected in U.S. and global oil production.

EIA projects the national diesel price will average $3.41 per gallon in second quarter 2025, down 22 cents from the first quarter and down 15 cents from EIA's March forecast. EIA further projects the U.S. diesel price will average $3.44 per gallon in 2025, down 32 cents from 2024's average price and down 18 cents from EIA's March forecast.

MY 2024/25 Export Projections: Rise Expected for Three Major Grains

For MY 2024/25, year-to-date (YTD) exports for the three grains remain strong, and accumulated shipments are up 18 percent from the same time last year, indicating strong transportation demand. Unshipped exports, which represent future transportation demand, are also up substantially (25 percent) from the same time last year (**GTR table 14**).

Mexico continues to be a strong buyer of the three major grains, and YTD unshipped sales to Mexico account for 32 percent of the total unshipped exports. Please see the **GTR's "Export Sales Update" (April 17, 2025)** for a breakdown of grain export sales by commodity, as well as an overview of the factors driving U.S. exports and transportation demand.

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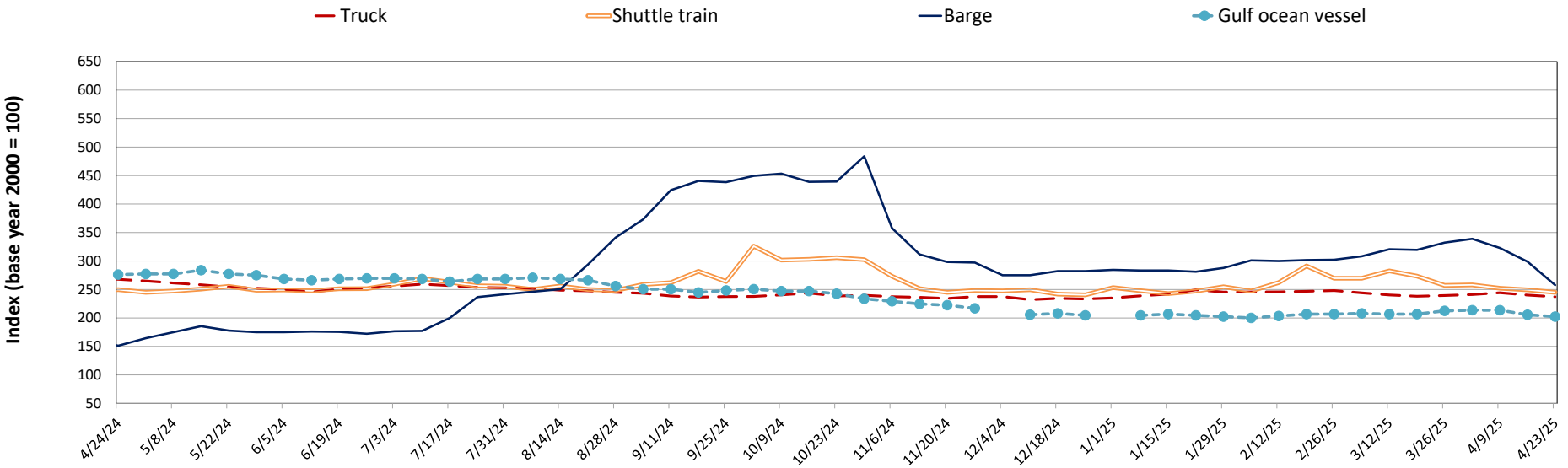
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
04/23/25	237	344	245	258	202	190
04/16/25	240	341	249	299	206	191
04/24/24	268	336	250	151	276	236

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.

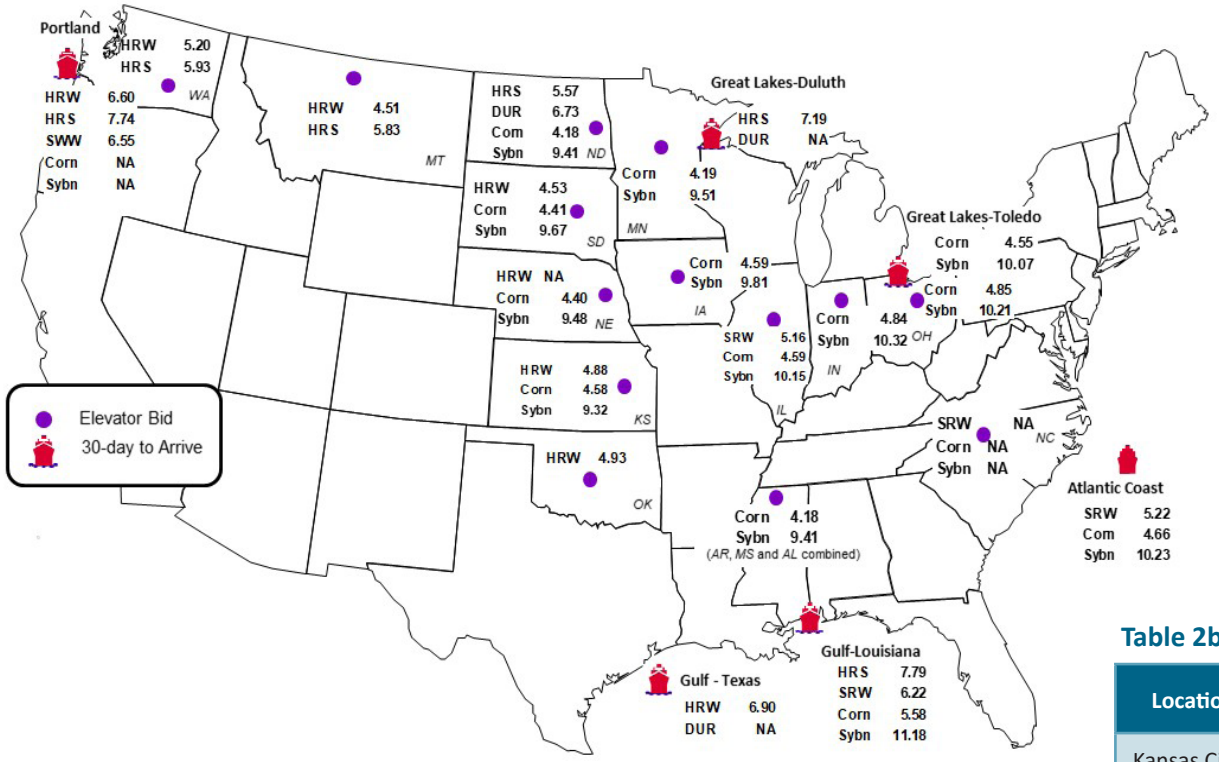
Figure 1. Grain transportation cost indicators as of week ending 4/23/25



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	4/17/2025	4/11/2025
Corn	IL–Gulf	-0.99	-1.02
Corn	NE–Gulf	-1.18	-1.19
Soybean	IA–Gulf	-1.37	-1.26
HRW	KS–Gulf	-2.02	-1.90
HRS	ND–Portland	-2.17	-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	4/17/2025	Week ago 4/11/2025	Year ago 4/19/2024
Kansas City	Wheat	May	5.744	5.582	5.946
Minneapolis	Wheat	May	6.062	6.150	6.470
Chicago	Wheat	May	5.646	5.490	5.794
Chicago	Corn	May	4.942	4.894	4.446
Chicago	Soybean	May	10.490	10.476	11.600

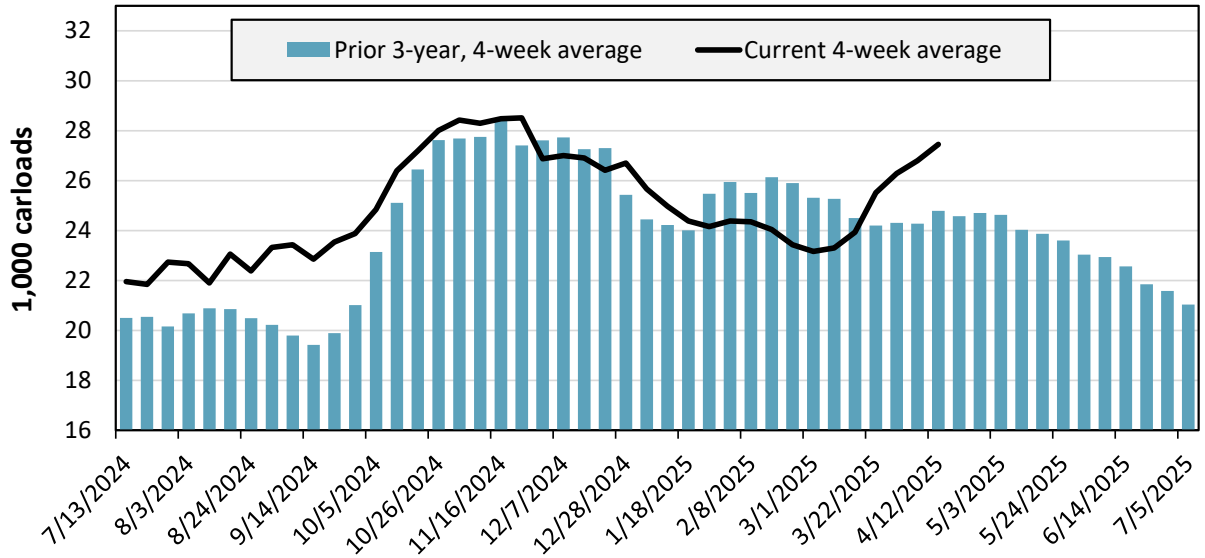
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 4/12/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,676	3,288	12,734	6,421	3,337	807	28,263
This week last year	1,463	2,267	11,365	5,296	2,761	548	23,700
2025 YTD	25,263	42,905	164,230	85,726	37,649	20,382	376,155
2024 YTD	24,842	40,217	161,579	80,347	44,978	15,535	367,498
2025 YTD as % of 2024 YTD	102	107	102	107	84	131	102
Last 4 weeks as % of 2024	101	112	111	106	93	186	110
Last 4 weeks as % of 3-yr. avg.	83	117	117	108	102	113	111
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 12, grain carloads were up 2 percent from the previous week, up 10 percent from last year, and up 11 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: 4/11/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Grain unit train origin dwell times (hours)	This week	68.0	26.8	20.3	15.7	3.9	26.2	15.4	25.2
	Average over last 4 weeks	50.1	30.9	21.3	15.8	7.1	40.3	18.3	26.3
	Average of same 4 weeks last year	40.4	34.9	22.4	15.3	5.0	14.0	26.1	22.6
Grain unit train speeds (miles per hour)	This week	20.3	18.2	24.5	22.2	23.3	21.4	23.2	21.9
	Average over last 4 weeks	21.0	18.6	24.2	21.7	23.4	21.2	23.4	21.9
	Average of same 4 weeks last year	23.2	17.8	25.1	22.9	24.4	23.2	27.2	23.4

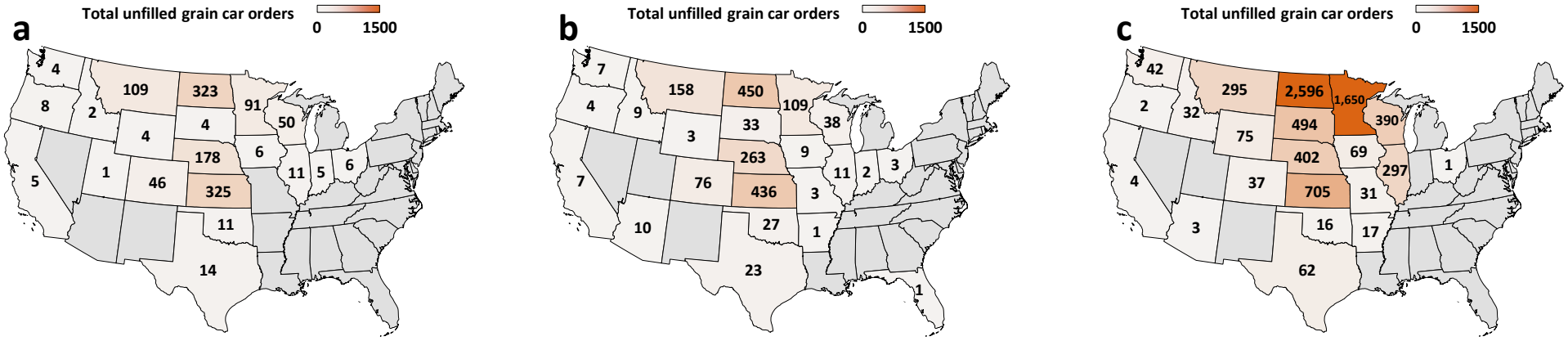
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

Table 4b. Rail service metrics—unfilled grain car orders and delays

For the week ending: 4/11/2025		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	106	2	342	80	19	40	6	595
	Average over last 4 weeks	73	9	306	99	11	60	5	563
	Average of same 4 weeks last year	24	7	491	90	2	38	22	675
Loaded grain cars not moved in over 48 hours (number)	This week	74	246	313	58	16	133	2	842
	Average over last 4 weeks	133	192	363	77	8	270	6	1,047
	Average of same 4 weeks last year	15	294	709	77	3	68	22	1,188
Grain unit trains held (number)	This week	1	1	11	5	0	2	2	22
	Average over last 4 weeks	1	0	13	6	0	4	2	26
	Average of same 4 weeks last year	1	3	17	5	0	2	6	34
Unfilled manifest grain car orders (number)	This week	15	0	346	477	0	365	230	1,433
	Average over last 4 weeks	8	5	390	768	0	511	108	1,790
	Average of same 4 weeks last year	2	4	6,184	551	0	477	0	7,217

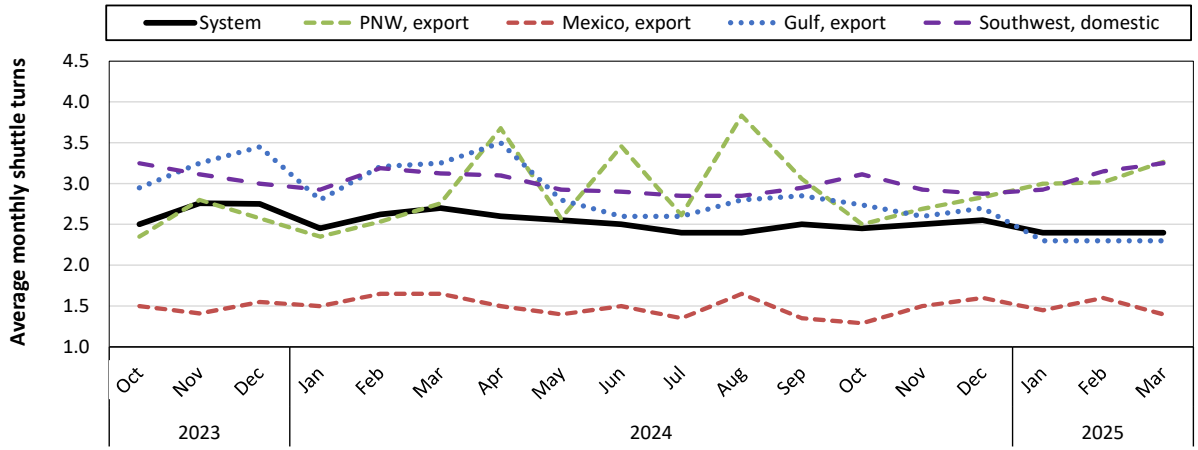
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 4/11/2025 (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

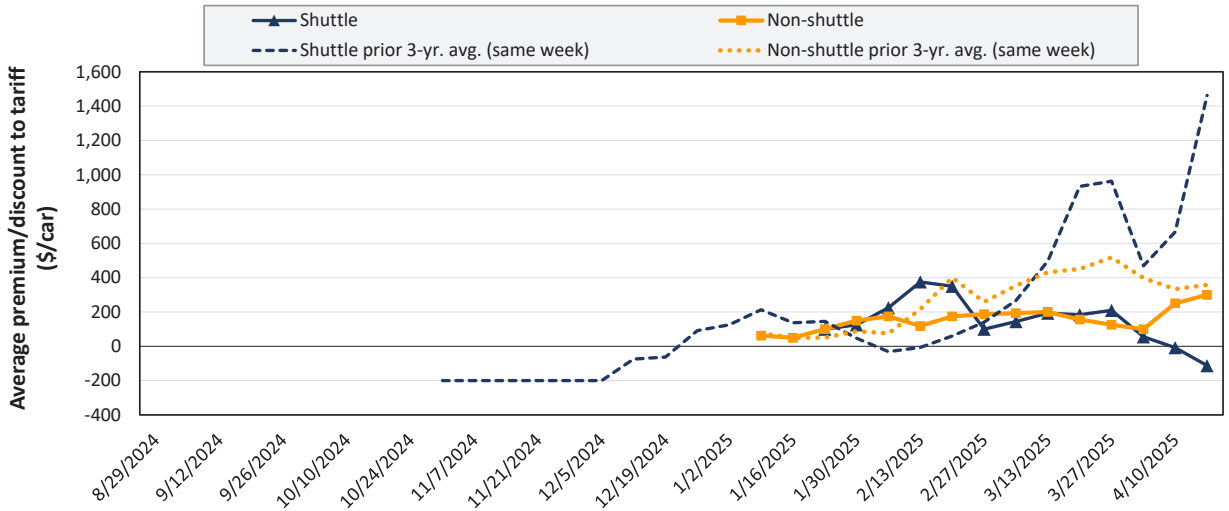


Average monthly systemwide grain shuttle turns for March 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.27 to PNW, 1.4 to Mexico, 2.3 to the Gulf, and 3.25 to the Southwest.

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



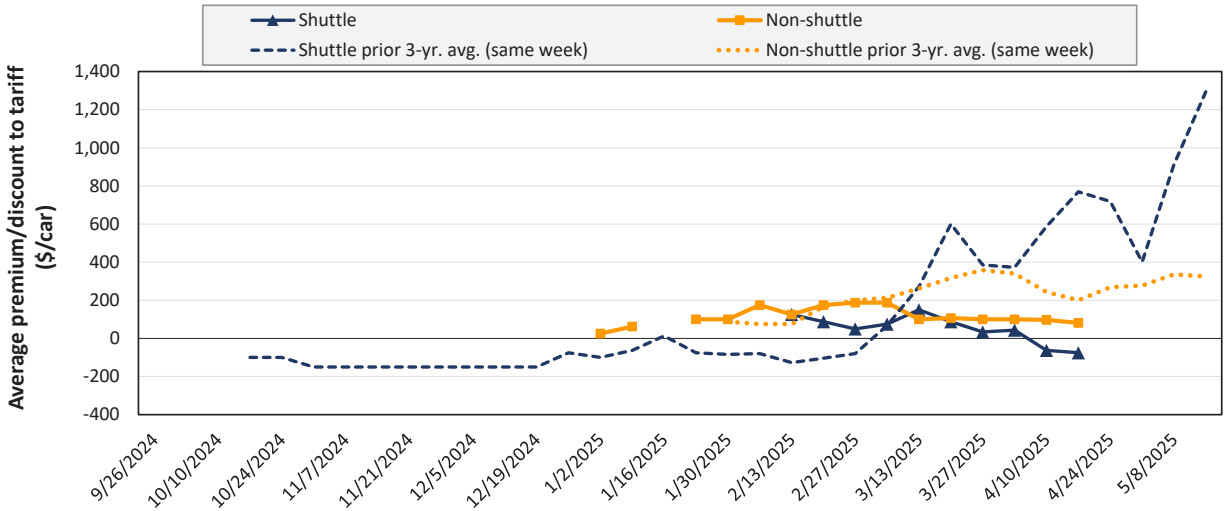
Average non-shuttle bids/offers rose $50 this week, and are at the peak.

Average shuttle bids/offers fell $105 this week and are $488 below the peak.

4/17/2025	BNSF	UP
Non-Shuttle	$300	n/a
Shuttle	$0	-$225

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



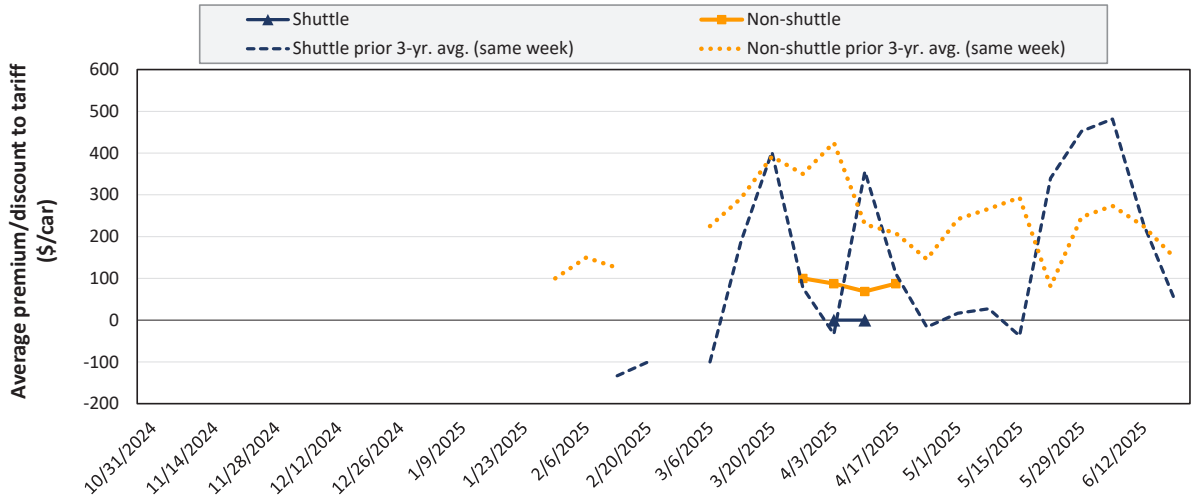
Average non-shuttle bids/offers fell $16 this week, and are $106 below the peak.

Average shuttle bids/offers fell $13 this week and are $225 below the peak.

4/17/2025	BNSF	UP
Non-Shuttle	$163	$0
Shuttle	$50	-$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 rose $19 this week, and are $13 below the peak.

There were no shuttle bids/offers this week.

4/17/2025	BNSF	UP
Non-Shuttle	$100	$75
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: 4/17/2025		Delivery period					
		Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Non-shuttle	BNSF	300	163	100	n/a	n/a	n/a
	Change from last week	50	7	0	n/a	n/a	n/a
	Change from same week 2024	0	-38	-150	n/a	n/a	n/a
	UP	n/a	0	75	n/a	n/a	n/a
	Change from last week	n/a	-38	37	n/a	n/a	n/a
	Change from same week 2024	n/a	-50	-125	n/a	n/a	n/a
Shuttle	BNSF	0	50	n/a	n/a	n/a	n/a
	Change from last week	-106	-25	n/a	n/a	n/a	n/a
	Change from same week 2024	0	50	n/a	n/a	n/a	n/a
	UP	-225	-200	n/a	n/a	n/a	n/a
	Change from last week	-104	0	n/a	n/a	n/a	n/a
	Change from same week 2024	-275	-63	n/a	n/a	n/a	n/a
	CPKC	-50	75	0	n/a	n/a	n/a
	Change from last week	-150	-25	75	n/a	n/a	n/a
	Change from same week 2024	0	125	0	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

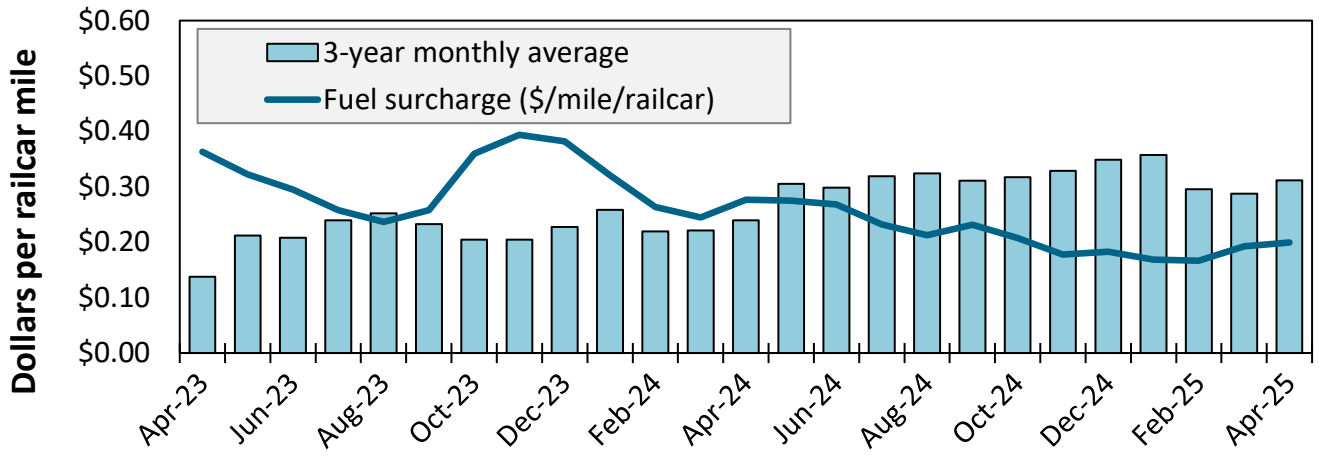
Note: A unit train refers to shipments of at least 25 cars. Shuttle train rates are generally available for qualified shipments of 75-120 cars that meet railroad efficiency requirements. The table assumes 111 short tons (100.7 metric tons) per car, 56 pounds per bushel of corn, and 60 pounds per bushel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

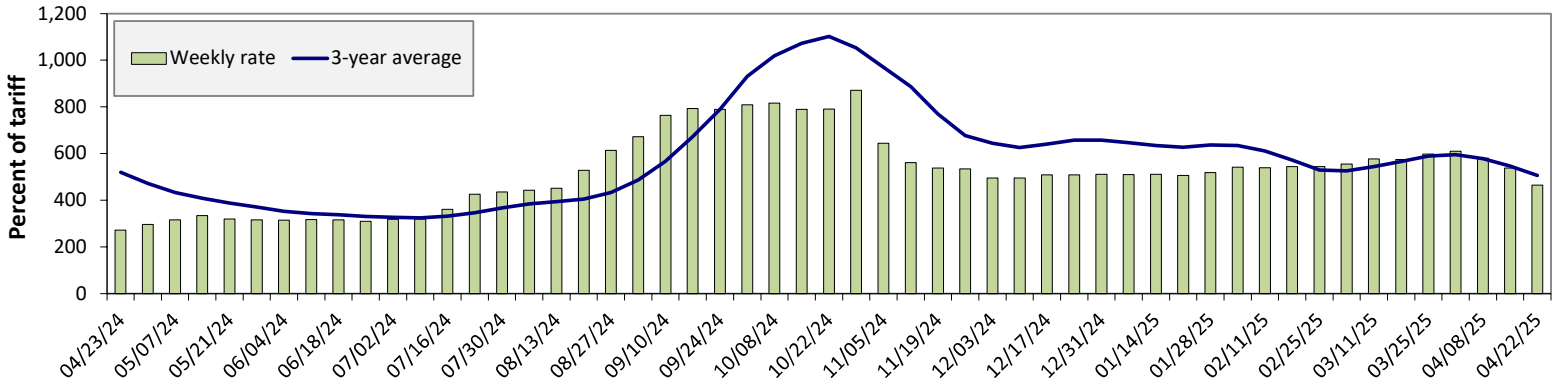
Figure 9. Railroad fuel surcharges, North American weighted average



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 22: 14 percent lower than the previous week; 71 percent higher than last year; and 8 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

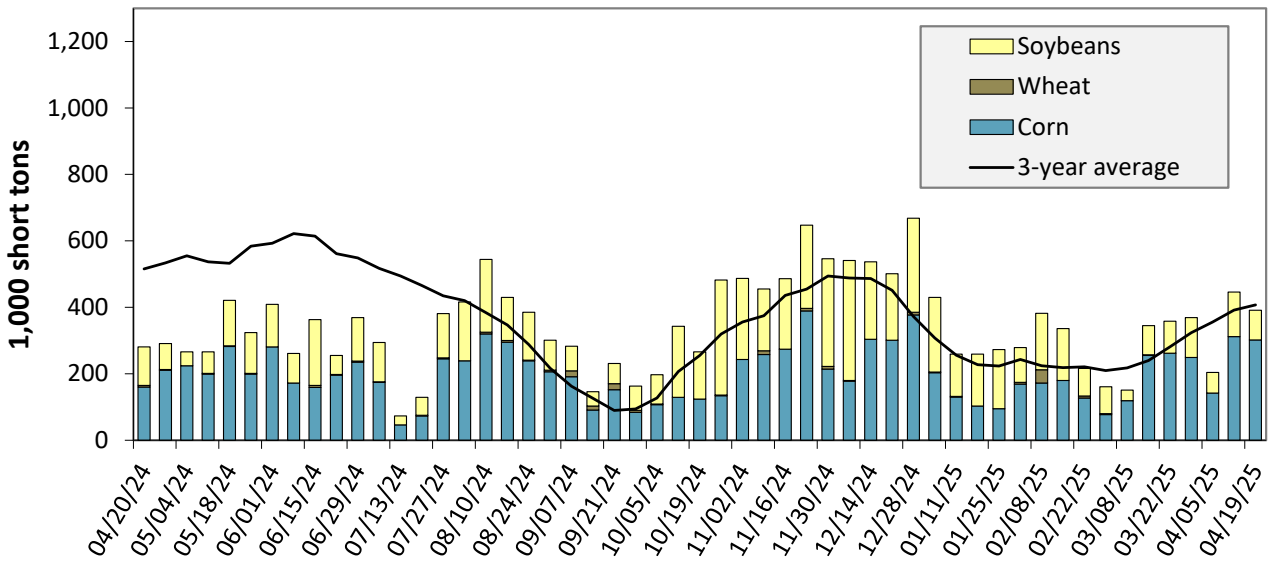
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	4/22/2025	553	513	464	349	375	326
	4/15/2025	600	573	538	397	392	348
$/ton	4/22/2025	34.23	27.29	21.53	13.93	17.59	10.24
	4/15/2025	37.14	30.48	24.96	15.84	18.38	10.93
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	75	85	71	68	58	63
	3-year avg.	-3	-4	-8	-11	-16	-7
Rate	May	525	463	438	325	339	305
	July	483	427	396	310	317	288

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 19: 39 percent higher than last year and 4 percent lower than the 3-year average.

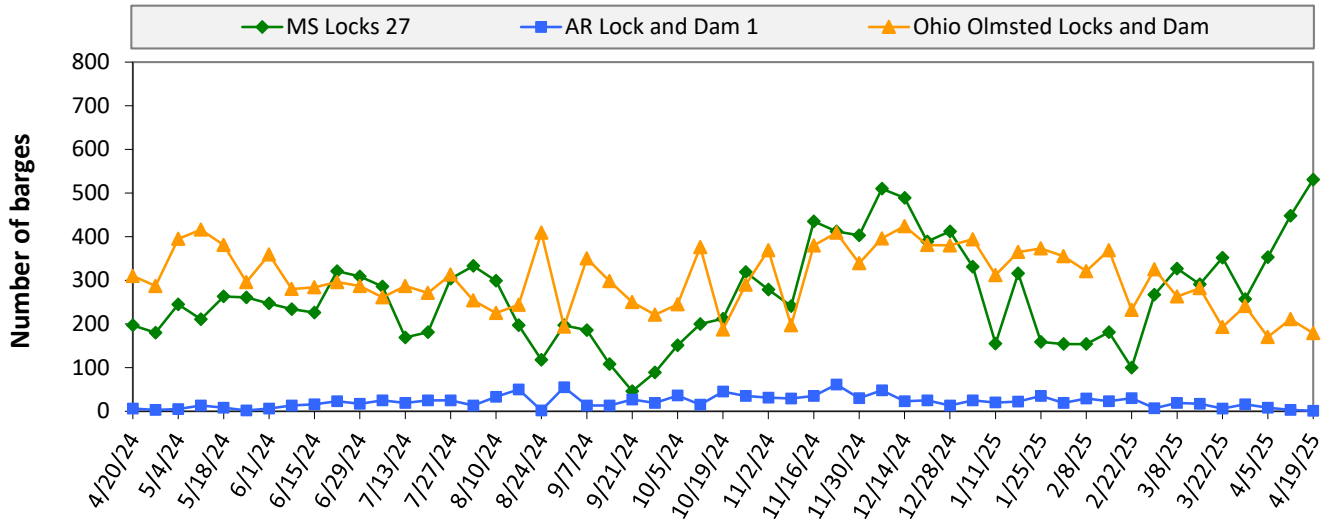
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 04/19/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	103	0	31	0	135
Mississippi River (Winfield, MO (L25))	136	2	60	0	197
Mississippi River (Alton, IL (L26))	282	2	88	0	372
Mississippi River (Granite City, IL (L27))	302	0	89	0	391
Illinois River (La Grange)	105	0	27	0	132
Ohio River (Olmsted)	11	2	15	0	28
Arkansas River (L1)	0	32	19	0	51
Weekly total - 2025	313	34	123	0	469
Weekly total - 2024	242	34	183	4	463
2025 YTD	4,978	299	3,503	75	8,855
2024 YTD	3,757	565	4,105	71	8,499
2025 as % of 2024 YTD	132	53	85	105	104
Last 4 weeks as % of 2024	120	37	92	210	102
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.

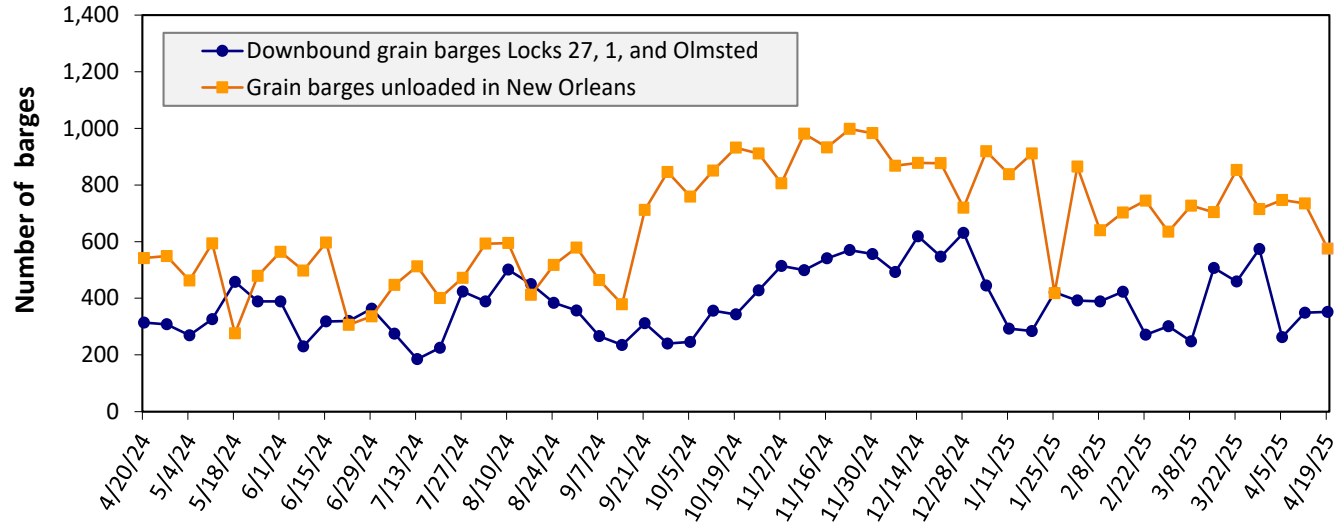
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending April 19: 711 barges transited the locks, 49 barges more than the previous week, and 9 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 19: 352 barges moved down river, 3 more than the previous week; 575 grain barges unloaded in the New Orleans Region, 22 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.

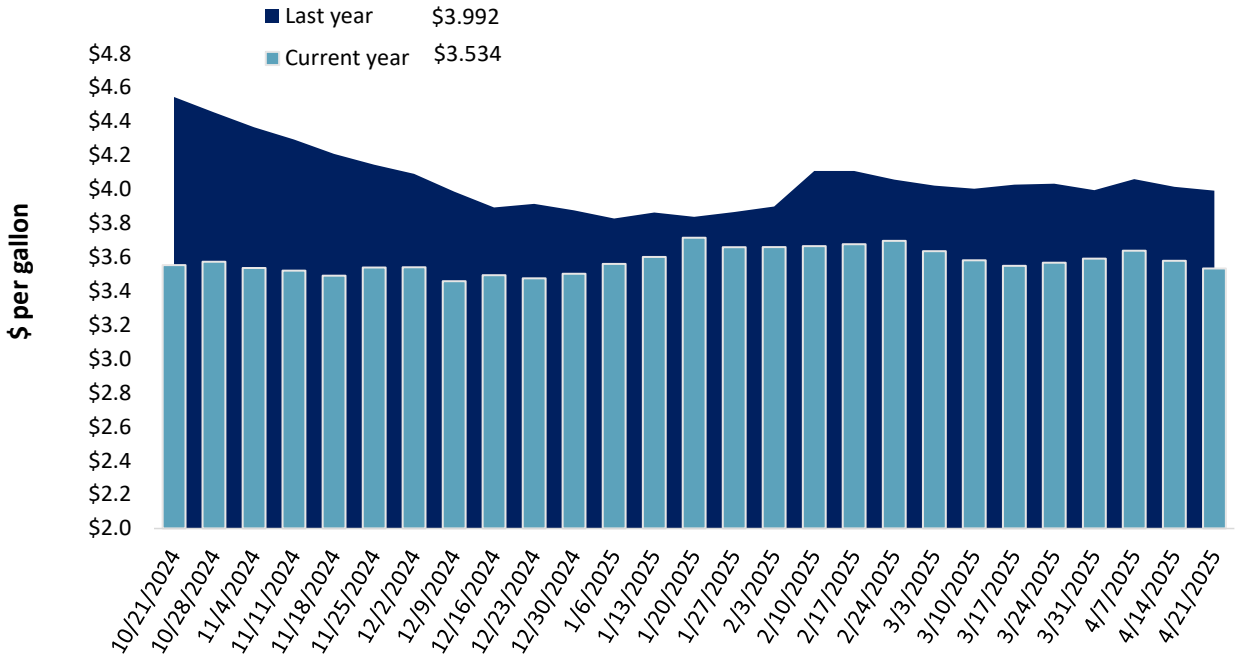
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 4/21/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.614	-0.046	-0.433
	New England	3.933	-0.029	-0.393
	Central Atlantic	3.819	-0.037	-0.436
	Lower Atlantic	3.505	-0.051	-0.436
II	Midwest	3.475	-0.035	-0.460
III	Gulf Coast	3.195	-0.072	-0.512
IV	Rocky Mountain	3.477	-0.003	-0.406
V	West Coast	4.250	-0.031	-0.411
	West Coast less California	3.813	-0.020	-0.341
	California	4.755	-0.042	-0.489
Total	United States	3.534	-0.045	-0.458

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 21, the U.S. average diesel fuel price decreased 4.5 cents from the previous week to $3.534 per gallon, 45.8 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 4/10/2025	1,223	388	1,082	1,066	71	3,829	18,176	4,512	26,518
	This week year ago	709	708	983	658	25	3,083	14,555	3,595	21,233
	Last 4 wks. as % of same period 2023/24	209	75	144	238	326	161	132	142	138
Current shipped (cumulative) exports sales	2024/25 YTD	4,226	2,744	5,649	4,690	286	17,594	38,405	42,267	98,266
	2023/24 YTD	2,916	3,548	5,414	3,294	479	15,652	30,123	37,688	83,462
	YTD 2024/25 as % of 2023/24	145	77	104	142	60	112	127	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 4/10/2025	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	19,684	18,747	5	17,746
Japan	9,463	7,920	19	9,366
China	33	2,131	-98	8,233
Colombia	5,794	4,688	24	4,383
Korea	4,169	1,659	151	1,565
Top 5 importers	39,142	35,145	11	41,293
Total U.S. corn export sales	56,581	44,678	27	51,170
% of YTD current month's export projection	87%	77%	-	-
Change from prior week	1,562	501	-	-
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 4/10/2025	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	22,337	23,655	-6	28,636
Mexico	4,372	4,410	-1	4,917
Japan	1,684	1,785	-6	2,231
Egypt	2,758	720	283	2,228
Indonesia	1,470	1,510	-3	1,910
Top 5 importers	32,620	32,080	2	39,922
Total U.S. soybean export sales	46,779	41,283	13	51,302
% of YTD current month's export projection	94%	89%	-	-
Change from prior week	555	486	-	-
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 4/10/2025	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	3,995	3,215	24	3,298
Philippines	2,597	2,834	-8	2,494
Japan	2,109	1,953	8	2,125
China	139	2,040	-93	1,374
Korea	2,395	1,350	77	1,274
Taiwan	1,012	1,101	-8	921
Nigeria	682	243	181	920
Thailand	891	460	94	552
Colombia	473	295	61	522
Vietnam	570	420	36	313
Top 10 importers	14,863	13,910	7	13,792
Total U.S. wheat export sales	21,424	18,735	14	18,323
% of YTD current month's export projection	96%	97%	-	-
Change from prior week	77	-94	-	-
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.

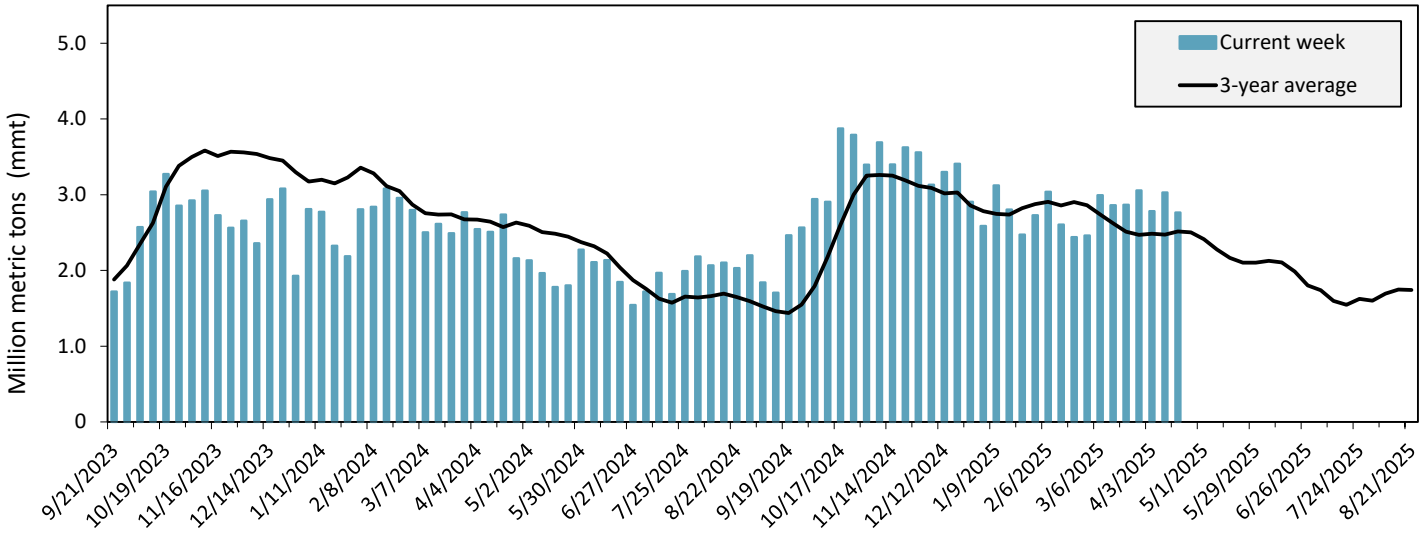
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 04/17/2025	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	695	597	116	7,742	5,704	136	112	178	13,987
	Soybeans	68	0	n/a	1,791	2,458	73	426	147	10,445
	Wheat	341	231	148	3,175	3,254	98	80	114	11,453
	All grain	1,104	829	133	12,798	12,106	106	104	139	37,186
Mississippi Gulf	Corn	706	867	81	11,376	7,616	149	137	109	27,407
	Soybeans	329	408	81	8,655	9,535	91	133	108	29,741
	Wheat	64	103	61	1,093	1,853	59	65	106	4,523
	All grain	1,099	1,378	80	21,124	19,059	111	125	108	61,789
Texas Gulf	Corn	0	0	n/a	105	168	63	18	23	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	70	153	46	955	512	186	210	166	1,940
	All grain	70	153	46	1,250	2,105	59	64	66	6,965
Interior	Corn	301	336	90	3,734	4,131	90	91	131	13,463
	Soybeans	149	144	103	2,021	2,465	82	108	122	8,059
	Wheat	16	124	13	847	837	101	115	119	2,952
	All grain	466	637	73	6,708	7,530	89	100	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	20	0	n/a	53	60	89	103	113	653
	All grain	20	0	n/a	53	60	89	103	53	1,060
Atlantic	Corn	0	29	0	122	145	84	79	125	410
	Soybeans	5	3	189	426	415	103	93	17	1,272
	Wheat	0	0	n/a	0	10	0	n/a	n/a	73
	All grain	5	32	16	548	571	96	76	39	1,754
All Regions	Corn	1,703	1,830	93	23,079	17,764	130	116	130	56,109
	Soybeans	551	555	99	13,104	14,926	88	138	109	50,865
	Wheat	510	611	83	6,122	6,526	94	90	119	21,594
	All grain	2,764	3,030	91	42,585	41,483	103	109	116	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.

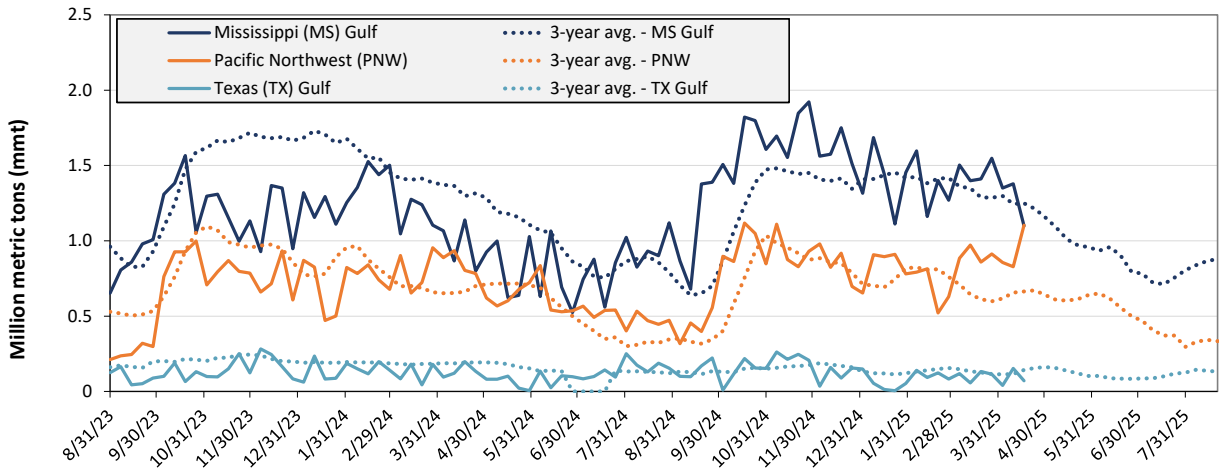
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Apr. 17: 2.8 mmt of grain inspected, down 9 percent from the previous week, down 2 percent from the same week last year, and up 10 percent from the 3-year average.

Note: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 18. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 04/17/25 inspections (mmt):
MS Gulf: 1.1
PNW: 1.1
TX Gulf: 0.07

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 20	down 54	down 24	up 33
Last year (same 7 days)	un-changed	down 70	down 12	up 25
3-year average (4-week moving average)	down 12	down 51	down 16	up 66

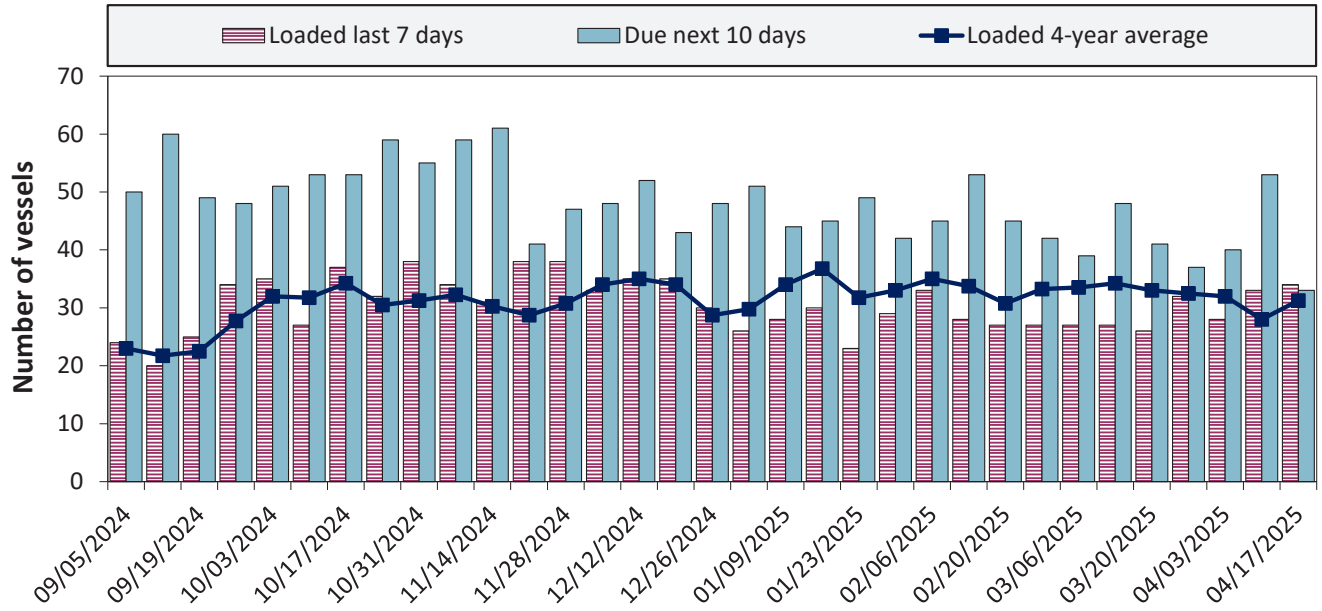
Source: USDA, Federal Grain Inspection Service.

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
4/17/2025	26	34	33	19
4/10/2025	24	33	53	21
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.

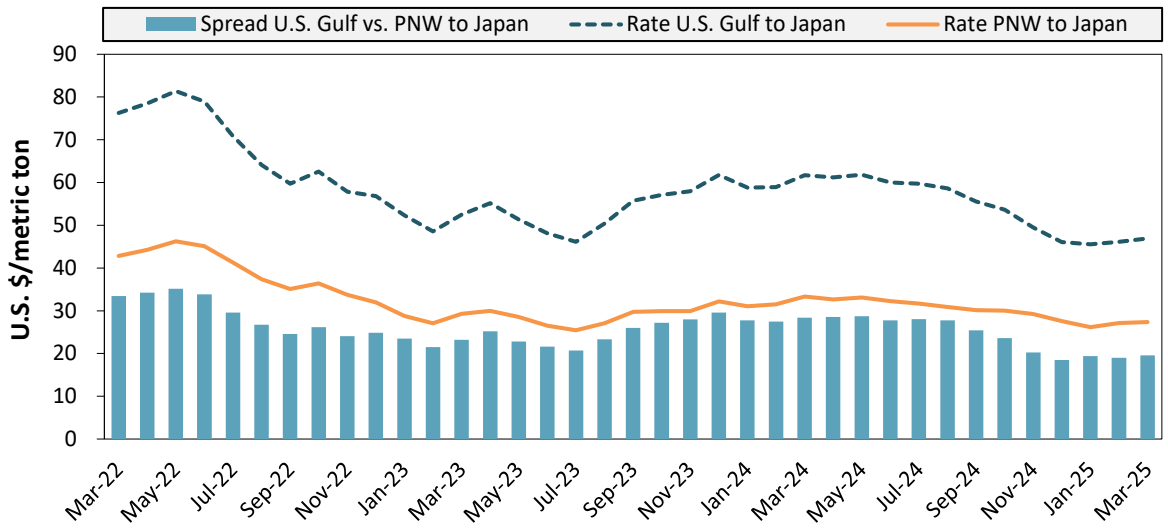
Figure 19. U.S. Gulf vessel loading activity



Week ending 04/17/25, number of vessels	Loaded	Due
Change from last year	21%	-6%
Change from 4-year average	9%	-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.

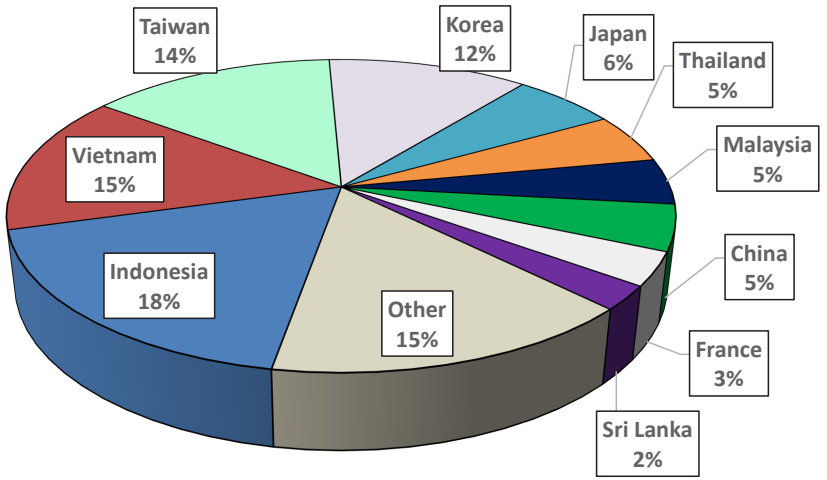
Table 20. Ocean freight rates for selected shipments, week ending 4/19/2025

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.

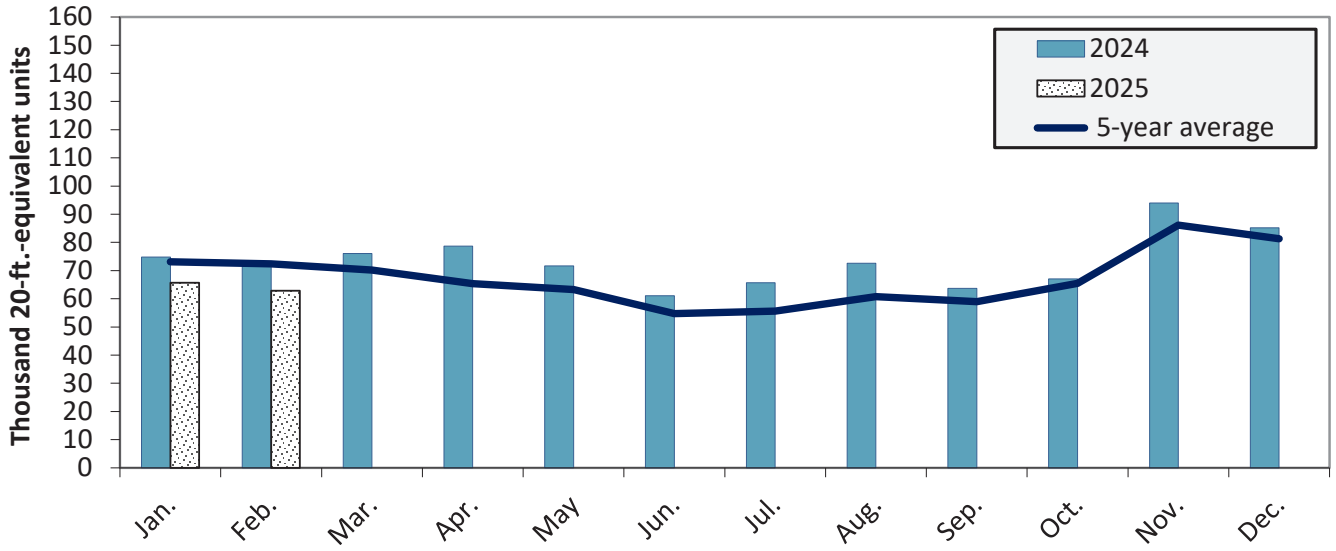
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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