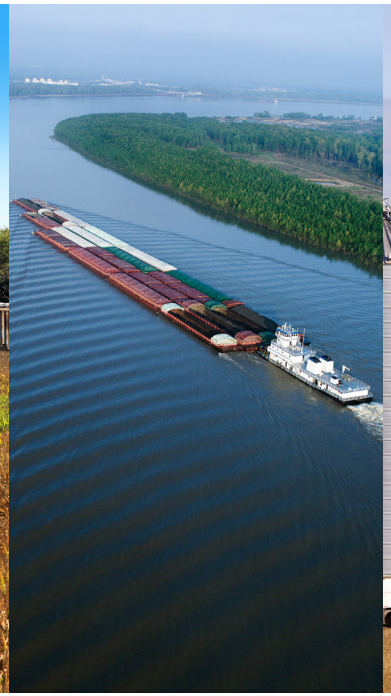
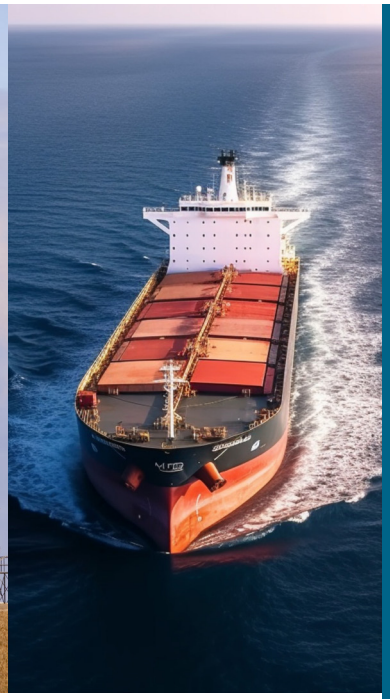
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

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HRW Wheat Inspections Reach 4-Year High. According to USDA's Federal Grain Inspection Service, in the week ending April 24, wheat inspected for export totaled 647,000 metric tons (mt)—a 7-month high (*Grain Transportation Report (GTR), table 18*). The largest class of wheat exports—hard red winter (HRW) inspections—reached 298,000 mt (HRW wheat's highest weekly total since July 2021).

In the week ending April 24, the top destinations for HRW wheat shipments included Mexico (85,000 mt); Colombia (53,000 mt); and Kenya (53,000 mt). Of HRW wheat total shipments, 42 percent departed from the Texas Gulf (i.e., Houston, TX); 40 percent, from the Columbia River (i.e., Portland, OR); and 18 percent, from Interior locations (by rail, to Mexico).

Harvest for next year's winter wheat crop (marketing year 2025/26) should begin later this month and continue over the summer. As shown in USDA/National Agricultural Statistics Service's latest *Crop Progress* report, 49 percent of winter wheat is rated good to excellent, which matches the rating for this time last year.

USDA/AMS Updates Report on Waterways' Role in Agriculture. USDA's Agricultural Marketing Service (AMS) recently updated its report *A Reliable Waterway System Is Important to Agriculture*, which was last published in January 2024. The updated report briefly highlights annual transportation statistics for some of the major agricultural commodities (such as grain, ethanol, and fertilizer) that use the waterway system.

For instance, in 2024, barges carried over 33.1 million short tons of fertilizer through inland waterway locks. In addition, the report discusses funding for harbor channels and inland waterways, draft issues, and increases in transport costs and delays caused by temporary lock closures.

Along with infrastructure for trucking, rail, and ocean transport, the Nation's inland waterways compose an efficient multimodal network that moves commodities domestically and abroad. Barges ship just under half of U.S. grain destined for export.

Rise in Asia-U.S. Container Ship Blank Sailings. On April 24, Sea Intelligence reported that container carriers had sharply increased the number of blank sailings on their Asia-U.S. routes. (A blank sailing is the canceling of a call to a port.) Carriers typically use blank sailings to maintain a schedule or to manage their capacity in the face of unexpectedly low demand.

On April 28, the *Journal of Commerce* reported that bookings from China to the United States had dropped nearly 54 percent in the week ending April 28 from a month prior. The steep decline led multiple carriers to reduce their capacity. Still, bookings from Southeast Asia have been rising.

Blank sailings disrupt containerized grain exports, because shippers depend on available, reliable importing vessels to provide the containers necessary for Asia-bound grain exports. According to Sea Intelligence, "many of these blank sailings have been announced with very limited advance warning to the shipper."

CN Highlights Growth in Iowa, as T&E Furloughs Tick Up. Last month, Canadian National Railway (CN) highlighted its growth in Iowa—following CN's recent merger with the Iowa Northern Railway (*GTR, February 13, 2025*). According to CN, in March 2025, the firm "moved more grain-related carloads in and out of Iowa than in any single month for the first half of the year going back to the early 2000s."

To support the network, CN has invested approximately $290 million in Iowa over the last decade. Last year, on CN's Osage subdivision (near Janesville, IA), the firm completed a bridge upgrade, allowing customers to load railcars up to 286,000 pounds. Additional bridge improvements are scheduled for this year.

Despite these investments, CN has furloughed 479 train and engine (T&E) employees on its U.S. network in first quarter 2025, according to data from the Surface Transportation Board. That number is 72 percent of all U.S. Class I furloughs so far in 2025. Although T&E furloughs are sometimes associated with service deterioration (*GTR, February 27, 2025*), CN's service metrics (on its U.S. network) are strong (*GTR table 4a* and *4b*).

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 17, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 25.05 million metric tons (mmt), down 6 percent from last week and up 24 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.15 mmt, down 26 percent from last week. Net **soybean export sales** were 0.28 mmt, down 50 percent from last week. Net **wheat export sales** for MY 2024/25 were –0.15 mmt, down 289 percent from last week.

Rail

U.S. Class I railroads originated 24,366 **grain carloads** during the week ending April 19. This was a 14-percent decrease from the previous week, unchanged from last year, and 2 percent more than the 3-year average.

Average May **shuttle secondary railcar bids/offers** (per car) were $103 below tariff for the week ending April 24. This was $28 less than last week and $19 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $63 above tariff. This was $19 less than last week and $125 lower than this week last year.

Barge

For the week ending April 26, **barged grain movements** totaled 670,133 tons. This was 43 percent more than the previous week and 52 percent more than the same period last year.

For the week ending April 26, 434 grain barges **moved down river**—82 more than last week. There were 498 grain barges **unloaded** in the New Orleans region, 13 percent fewer than last week.

Ocean

For the week ending April 24, 25 **oceangoing grain vessels** were loaded in the Gulf—4 percent more than the same period last year. Within the next 10 days (starting April 25), 27 vessels were expected to be loaded—27 percent fewer than the same period last year.

As of April 24, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $45.75, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $27.00 per mt, up 1 percent from the previous week.

Fuel

For the week ending April 28, the U.S. average **diesel price** decreased 2.0 cents from the previous week, to $3.514 per gallon—43.3 cents below the same week last year.

GTR Updates and Expands Its Grain Rail Tariffs

Beginning with this week's issue of the *Grain Transportation Report* (GTR), USDA's Agricultural Marketing Service launches a major upgrade to its corn, soybean, and wheat rail tariff collection, which was last revamped in 2010. The most recent effort almost doubles the number of published rates, from 38 origin-destination-railroad combinations to 70.

A railroad tariff rate—together with any fuel surcharges and secondary freight costs (i.e., costs for guaranteed car placements)—constitutes the full cost of shipping grain by rail. Available, accurate data on rail tariff rates for grain shipments fulfill a crucial need: the information helps farmers, shippers, receivers, and other stakeholders to understand their costs and make decisions on where, when, and how much to ship.

This article gives background on rail transportation by tariff and describes the updates to **GTR table 6** and **GTR table 7**. These tables show tariff rates; tariff rates plus applicable fuel surcharges; and total freight rates on a per bushel and per metric ton basis. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on **AgTransport**.

Background on Rail Tariff Rates

Since the Interstate Commerce Act of 1887, railroads have published tariffs—a schedule of publicly available freight rates and service terms. Before the railroad industry was partially deregulated (in the 1980s), all rail traffic was moved under tariff rates, and these rates were subject to regulatory approval by the Interstate Commerce Commission (ICC).

Since deregulation, railroads are no longer required to file tariffs with the ICC's successor—the Surface Transportation Board (STB). However, by statute, railroads must disclose their tariff rates and service terms upon request. Railroads have further responsibilities related to grain—namely, that they "publish, make available, and retain for public inspection" all grain tariff rates.[1] Additionally, shippers (or other affected parties) may challenge, before STB, tariff rates they deem to be unreasonable.

Another result of railroad deregulation involves the use of confidential contracts for rail service—in lieu of tariffs. Following deregulation, the railroads' use of contracts rapidly increased—reaching 75 percent of all U.S. carload ton-miles by 2012, according to a **2015 report** by the Transportation Research Board (TRB). However, unlike other commodities (e.g., coal or chemicals), most grain (over three-quarters) still moves under tariff rates. TRB surmised that contracts have not been used for shipping grain to the same extent as for other commodities "because [grain] shipment characteristics and volume fluctuations require more flexibility than contract commitments would allow."

Even though most grain moves under tariff rates, some railroads and shippers do use contracts to move grain. Contracts' prevalence varies by region. The western Class I railroads—i.e., BNSF Railway (BNSF), Union Pacific Railroad (UP), and Canadian Pacific Kansas City (CPKC)—extensively use tariff rates for domestic grain movements. Grain shipments to the U.S.-Mexico border use a mix of both contract rates and tariff rates (**GTR table 8**). More common among eastern than western Class I railroads, contract rates for grain movements are commonly used by Canadian National Railway (CN), CSX Transportation (CSX), and Norfolk Southern Railway (NS). In this region, it is typical for grain receivers (e.g., livestock companies) to contract with the railroads.

GTR Table 6—Wheat Tariff Rates

GTR table 6 shows 31 rates for wheat shipments—broken out by major wheat classes.[2] The largest wheat classes, by production, are hard red winter (HRW) and

1 49 U.S. Code § 11101(d).

2 For a summary of wheat classes (e.g., average production and typical growing regions), refer to "Wheat Sector at a Glance" from USDA's Economic Research Service.

hard red spring (HRS). Most HRW wheat is grown in the southern Great Plains, and most HRS wheat is grown in the northern Great Plains. From production areas in the Great Plains, wheat travels either to export terminals or to flour mills for domestic consumption.

GTR table 6 includes several routes with the same origins (e.g., Hillsboro, ND, and Garden City, KS) and several routes with the same destinations (e.g., Texas Gulf and the Pacific Northwest (PNW)). The overlap allows readers to quickly calculate freight spreads. For example, although PNW and Texas Gulf export terminals are roughly equidistant (at 1,500 miles) from the Alton Grain Terminal in Hillsboro, ND, the total freight rate (i.e., tariff and fuel surcharge), as of May, is $0.16 per bushel cheaper for shipping from Hillsboro to the Texas Gulf than to the PNW.

Export Shipments. The primary ports for wheat exports are the PNW (e.g., Portland, OR); New Orleans, LA; Texas Gulf (e.g., Houston, TX); and the Great Lakes (e.g., Duluth, MN). GTR table 6 includes eight rates for a Texas Gulf destination, seven rates for a PNW destination, and two rates for a Great Lakes destination. Because most wheat is grown far away from the Mississippi River System, wheat is conveyed to Texas Gulf and PNW export terminals mainly by rail—a situation that raises concerns about overly concentrated **rail market power**.

However, two routes in GTR table 6 demonstrate the effects of competition—one shows *intermodal* competition in the PNW, and the other shows *intramodal* competition in the southern Great Plains. In GTR table 6, the total freight rate for shipping soft white wheat from Ritzville, WA, to PNW export terminals is $2,062 per car—which equates to $18.58 per (short) ton. In eastern Washington, rail competes with barge shipments along the Columbia-Snake River System. In **GTR table 11**, the barge rate for shipping wheat from Lower Monumental dam (about 50 miles south of Ritzville) to PNW export terminals is $18.63 per ton—nearly identical to the rail rate from Ritzville.

In Kansas—away from barge competition—BNSF and UP compete on shipments of HRW wheat from Salina, KS, to Texas Gulf export terminals. Currently, BNSF's tariff rate for this route is $4,605 per car, and UP's tariff rate is $4,425 per car. However, the two railroads have different fuel surcharge formulas, and when fuel surcharges are added in, BNSF's rate is $4,673 per car, and UP's rate is $4,654 per car—a difference of less than 1 percent.

Domestic Shipments. According to Sosland's ***Grain & Milling Annual 2025***, 144 wheat flour mills and 16 durum flour mills are dispersed around the United States—typically, near major population centers. Because the eastern Class I railroads—CSX and NS—do not have access to major HRW and HRS wheat production regions, wheat destined for East Coast flour mills (e.g., Albany, NY) must be interchanged between a western Class I railroad and an eastern Class I railroad. The interchange is typically done in Chicago, IL.

GTR table 6 shows four rates destined to Chicago and four rates originating in Chicago (on CSX). Thus, the cost to ship from Kansas to New York would involve two tariff rates.[3] In recent years, some East Coast flour mills have opted to import European wheat, when doing so costs less than receiving U.S. wheat by rail (**GTR, November 23, 2023, first highlight**).

Wheat shipments to flour mills tend to use manifest service (i.e., smaller blocks of cars) because most mills cannot receive shuttle/unit trains (i.e., trains that move 100+ cars from one origin to one destination). BNSF's Domestic Efficiency Trains (DET) combine elements of shuttle and manifest service. Like shuttle trains, DETs are made up of 110 cars loaded at a single grain elevator. DETs are then split, en route, to multiple destinations (i.e., flour mills). GTR table 6 features four DET routes—three that are split in Chicago (for delivery to East Coast mills) and one that is destined for California.

GTR Table 7—Corn and Soybean Tariff Rates

Unlike wheat shipments (which use both shuttle service and manifest service), most corn and soybeans are shipped using shuttle/unit trains. Grain unit trains first emerged in the

3 Railroad tariff rates that are combined with another rate (at either the origin or destination) are referred to as "Rule 11" rates.

late 1960s to compete with barge transport for shipping grain to export terminals in the U.S. Gulf.[4] Following railroad deregulation in the 1980s, the use of unit trains expanded quickly, as railroads and shippers benefited from the economies of scale they provide.[5] GTR table 7 includes 24 corn rates and 15 soybean rates—all using unit/shuttle trains.

Corn Shipments. Most domestic rail shipments of corn are to regions with feed grain deficits (i.e., regions where livestock needs exceed local corn production). The largest of these regions are the Texas Panhandle, California's Central Valley, and the Southeast (particularly, North Carolina and Georgia).

Rail tariff rates, in GTR table 7, reveal very different patterns for domestically used corn than for exported corn, as illustrated by origin freight spreads for BNSF's two major corn destinations—PNW export terminals and cattle feedlots in the Texas Panhandle. BNSF's rates to Hereford, TX, (in the Texas Panhandle) show significant variation. For example—although Hereford is 200 miles closer to Edison, NE, than to Mendota, IL—the total freight rate (per bushel) from Edison ($1.29), is $0.12 higher than from Mendota ($1.17).

In contrast, BNSF's total freight rates, in GTR table 7, for the four corn export routes to the PNW vary by only $113 per car, or a few cents per bushel. (Notably, Edison, NE—the farthest origin from the PNW—has the cheapest total freight rate.) The difference in origin freight spreads between Texas Panhandle- and PNW-destined shipments may be explained by PNW exports' competition with corn exports from the U.S. Gulf and from other global competitors (e.g., Argentina, Brazil, and Ukraine).

Soybean Shipments. For domestic use, just over half of U.S. soybean production is crushed (typically, near soybean-producing areas), and this process results in two byproducts—soybean oil and soybean meal. Soybean meal is railed (like corn) to feed-grain-deficit areas or exported (**GTR, January 25, 2024**). Soybean oil is railed to food processing and biofuels production facilities (**GTR, April 18, 2024**).

Just under half of U.S. soybean production is exported, so most (whole) soybean rail movements are destined for export terminals. GTR table 7 includes six rates to the PNW; two to St. Louis (for rail-to-barge transfer); three to South Louisiana; two to the Texas Gulf; and one each to Mobile, AL, and Chesapeake, VA.

Because the eastern Class I railroads often use private (i.e., shipper-owned) railcars, GTR table 7 includes several rates for private cars. From Gibson City to South Louisiana, rates are shown both for private cars and railroad-owned cars. For both corn and soybeans, the discount for using a private car is $380 per car, or about $0.10 per bushel.

Looking Forward—Railroads Prepare for New Marketing Year

Class I railroads typically update grain rail tariffs in conjunction with the new marketing year. For wheat, the new marketing year begins on June 1, so several HRW wheat tariffs in GTR table 6 will change next month. For corn and soybeans, the marketing year begins on September 1, and railroads typically update those tariff rates in the fall. For BNSF, soybean tariffs will update on September 1 and corn tariffs, on October 1.

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4 In 1967, Cargill worked with the Illinois Central Railroad to send the first unit train made up of 115 cars of corn from Gibson City, IL, to Louisiana export terminals. Although the Illinois Central Railroad was purchased by CN in 1998, the Gibson City to Louisiana route remains important and is included in *GTR* table 7 for both corn and soybeans.

5 MacDonald, James M. "Railroad deregulation, innovation, and competition: Effects of the Staggers Act on grain transportation." *The Journal of Law and Economics* 32, no. 1 (1989): 63-95.

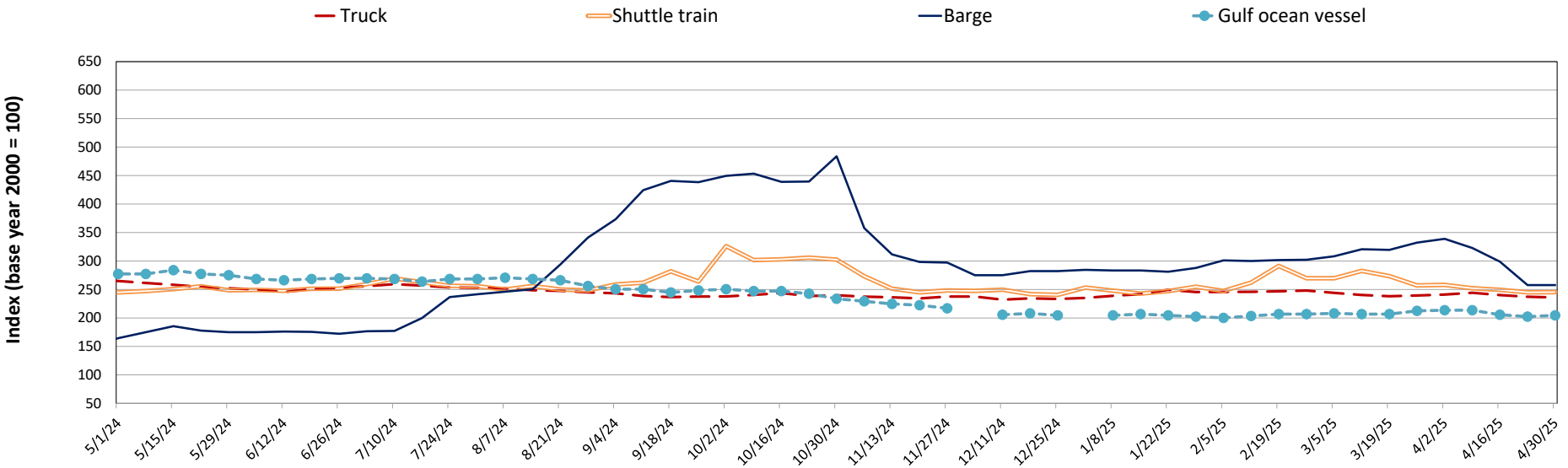
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail		Barge	Ocean	
		Non-shuttle	Shuttle		Gulf	Pacific
04/30/25	236	331	245	258	205	191
04/23/25	237	344	245	258	202	190
05/01/24	265	330	245	164	277	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.

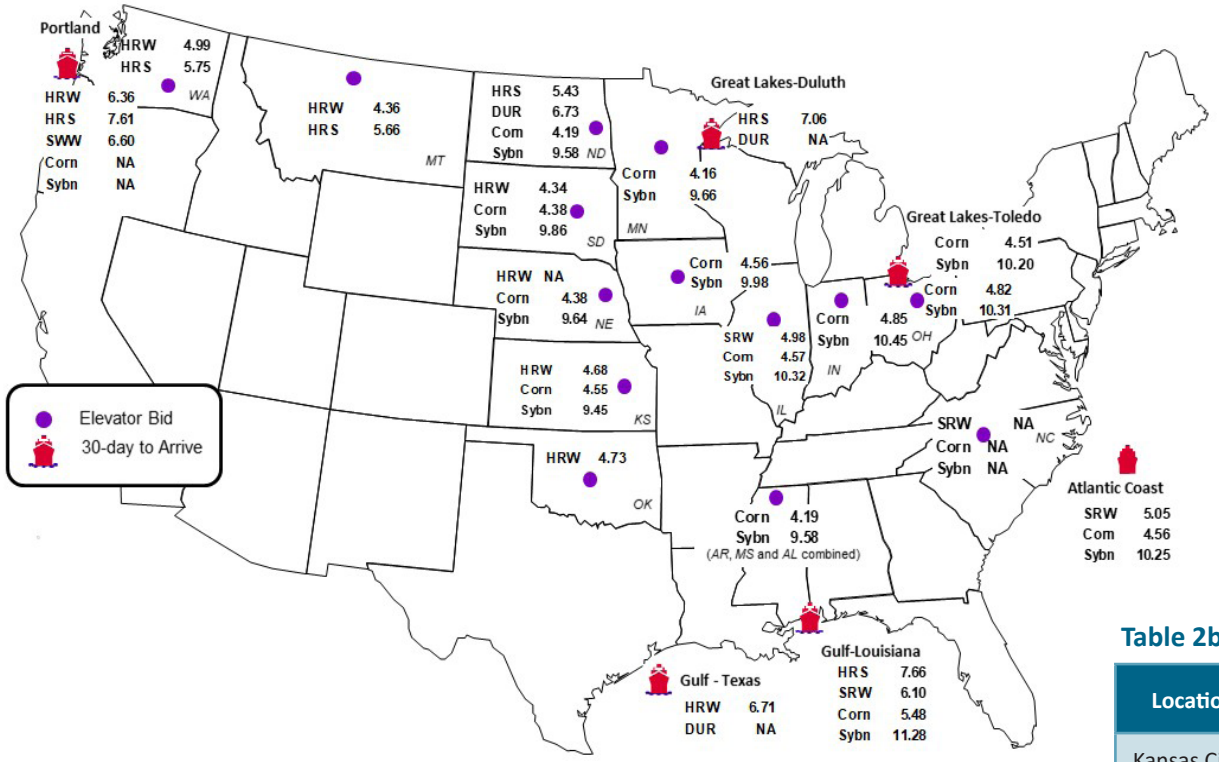
Figure 1. Grain transportation cost indicators as of week ending 4/30/25



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	4/25/2025	4/17/2025
Corn	IL–Gulf	-0.91	-0.99
Corn	NE–Gulf	-1.10	-1.18
Soybean	IA–Gulf	-1.30	-1.37
HRW	KS–Gulf	-2.03	-2.02
HRS	ND–Portland	-2.18	-2.17

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	4/25/2025	Week ago 4/17/2025	Year ago 4/26/2024
Kansas City	Wheat	May	5.508	5.744	6.526
Minneapolis	Wheat	May	5.912	6.062	6.972
Chicago	Wheat	May	5.450	5.646	6.104
Chicago	Corn	May	4.854	4.942	4.482
Chicago	Soybean	May	10.592	10.490	11.832

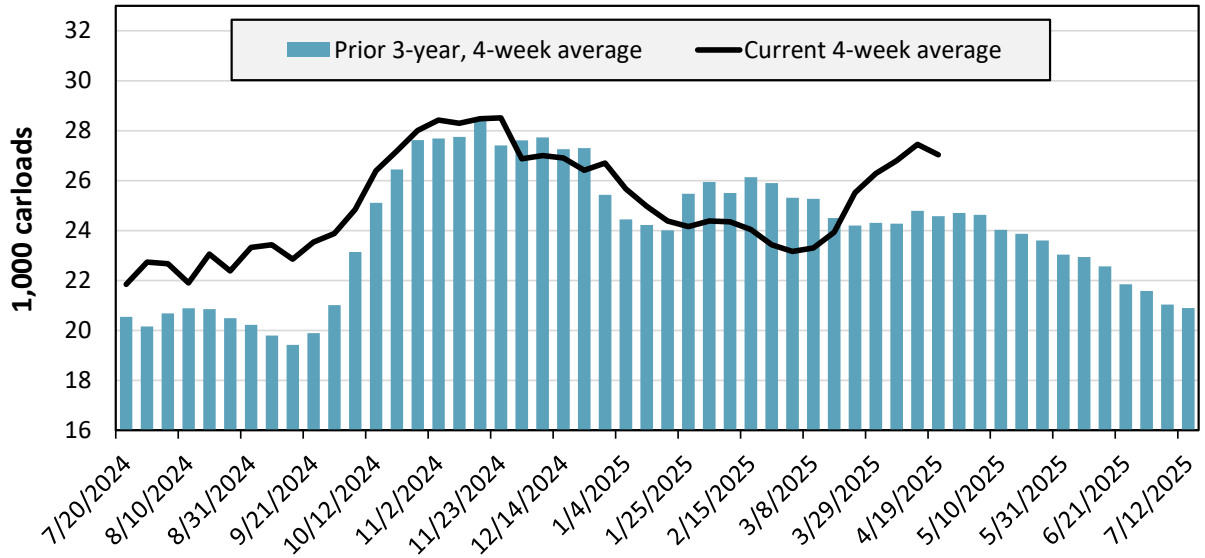
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 4/19/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,677	2,931	10,672	5,158	2,550	1,378	24,366
This week last year	1,480	2,583	11,190	5,558	2,863	785	24,459
2025 YTD	26,940	45,836	174,902	90,884	40,199	21,760	400,521
2024 YTD	26,322	42,800	172,769	85,905	47,841	16,320	391,957
2025 YTD as % of 2024 YTD	102	107	101	106	84	133	102
Last 4 weeks as % of 2024	105	116	105	111	94	186	109
Last 4 weeks as % of 3-yr. avg.	90	117	113	110	104	114	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 19, grain carloads were down 2 percent from the previous week, up 9 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: 4/18/2025		East		West		Central U.S.			U.S. Average
		CSX	NS	BNSF	UP	CN	CP	KCS	
Average grain unit train origin dwell times (hours)	This week	22.6	34.2	16.9	15.1	27.9	29.1	12.4	22.6
	Average over last 4 weeks	49.3	32.5	20.4	15.1	11.0	33.5	17.4	25.6
	Average of same 4 weeks last year	35.8	31.3	19.1	15.8	5.3	13.0	25.9	20.9
Average grain unit train speeds (miles per hour)	This week	21.6	17.4	24.4	22.2	23.9	18.8	23.4	21.7
	Average over last 4 weeks	21.2	18.3	24.4	21.9	23.5	20.6	23.5	21.9
	Average of same 4 weeks last year	23.2	18.2	25.2	23.0	24.7	22.6	27.1	23.4

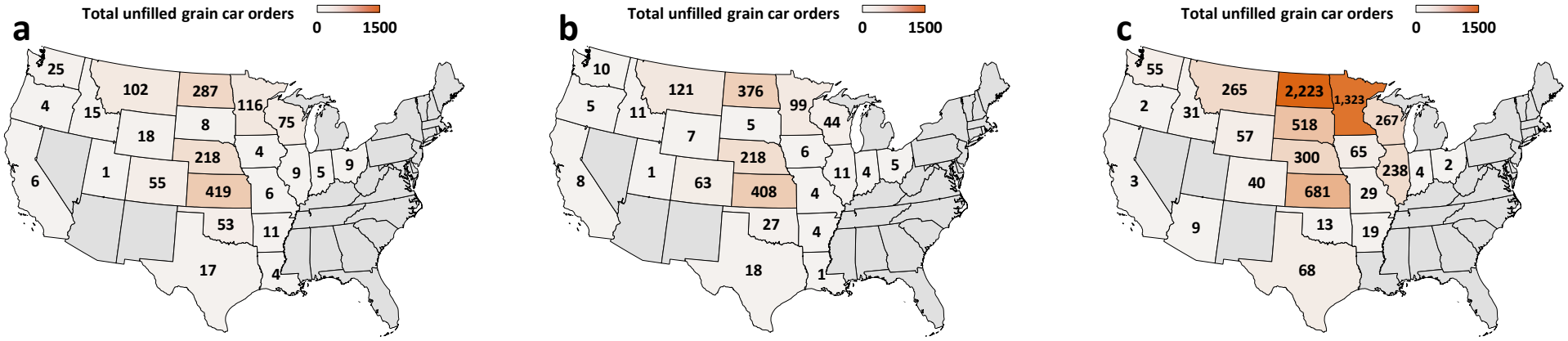
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 4/18/2025		East		West		Central U.S.			U.S. Total
		CSX	NS	BNSF	UP	CN	CP	KCS	
Average number of empty grain cars not moved in over 48 hours	This week	50	12	330	104	9	63	8	576
	Average over last 4 weeks	69	8	307	98	11	66	5	564
	Average of same 4 weeks last year	17	5	490	93	2	43	23	672
Average number of loaded grain cars not moved in over 48 hours	This week	101	179	257	98	6	162	15	818
	Average over last 4 weeks	120	191	314	79	7	210	6	928
	Average of same 4 weeks last year	15	278	622	86	3	61	22	1,086
Average number of grain unit trains held	This week	1	1	9	6	0	5	2	24
	Average over last 4 weeks	1	1	10	6	0	4	2	23
	Average of same 4 weeks last year	1	3	15	5	0	3	7	33
Total unfilled manifest grain car orders	This week	14	2	319	745	0	387	0	1,467
	Average over last 4 weeks	11	6	298	678	0	461	58	1,511
	Average of same 4 weeks last year	2	4	5,419	541	0	243	0	6,208

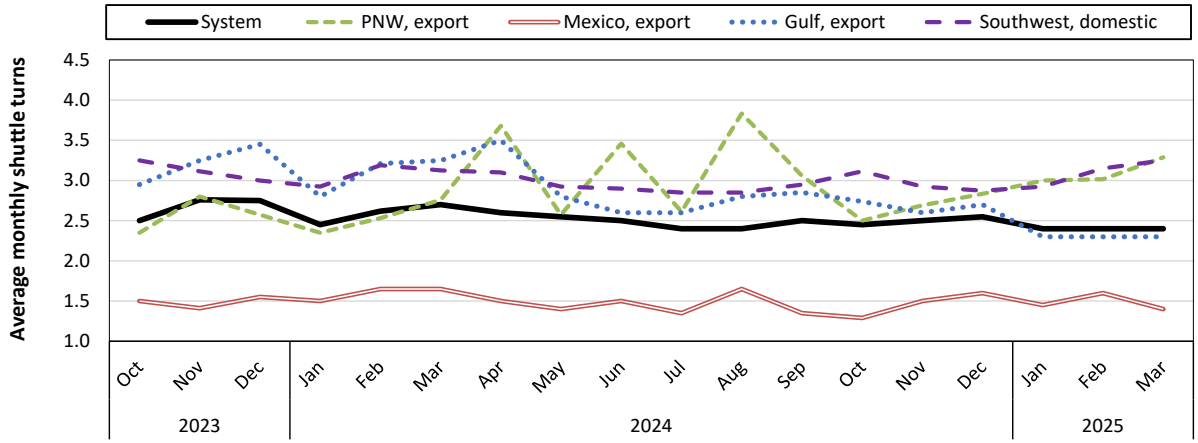
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 4/18/2025 (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

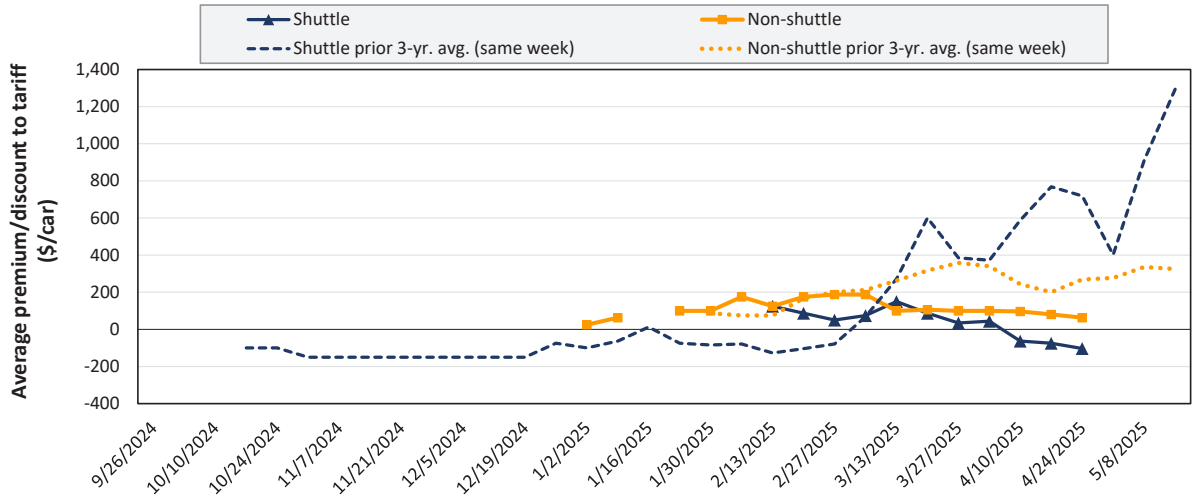


Average monthly systemwide grain shuttle turns for March 2025 were 2.4. By destination region, average monthly grain shuttle turns were 3.27 to PNW, 1.4 to Mexico, 2.3 to the Gulf, and 3.25 to the Southwest.

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 May 2025



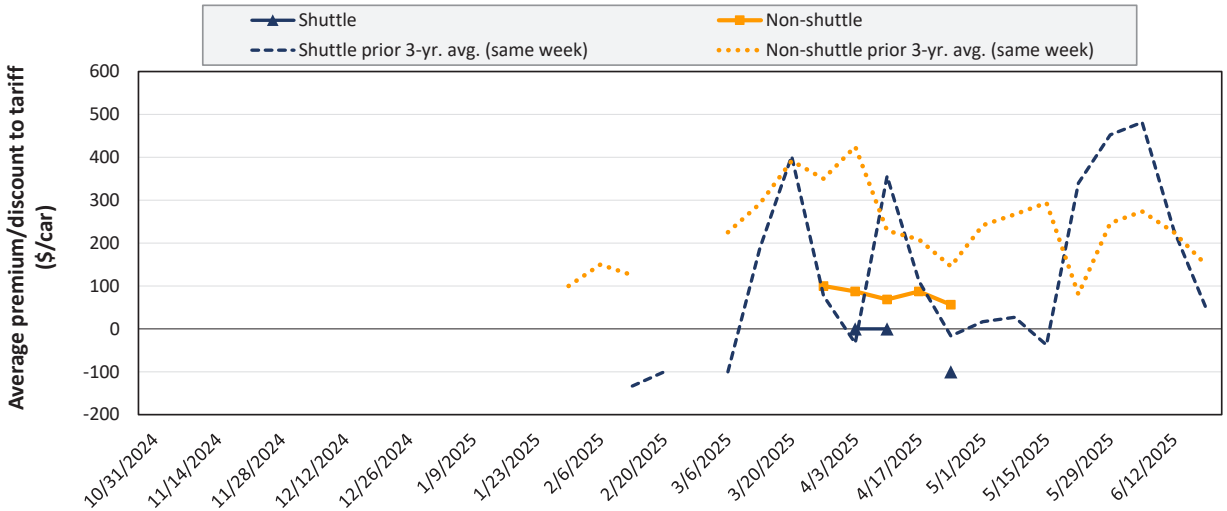
Average non-shuttle bids/offers fell $19 this week, and are $125 below the peak.

Average shuttle bids/offers fell $28 this week and are $253 below the peak.

4/24/2025	BNSF	UP
Non-Shuttle	$225	-$100
Shuttle	$6	-$213

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 June 2025



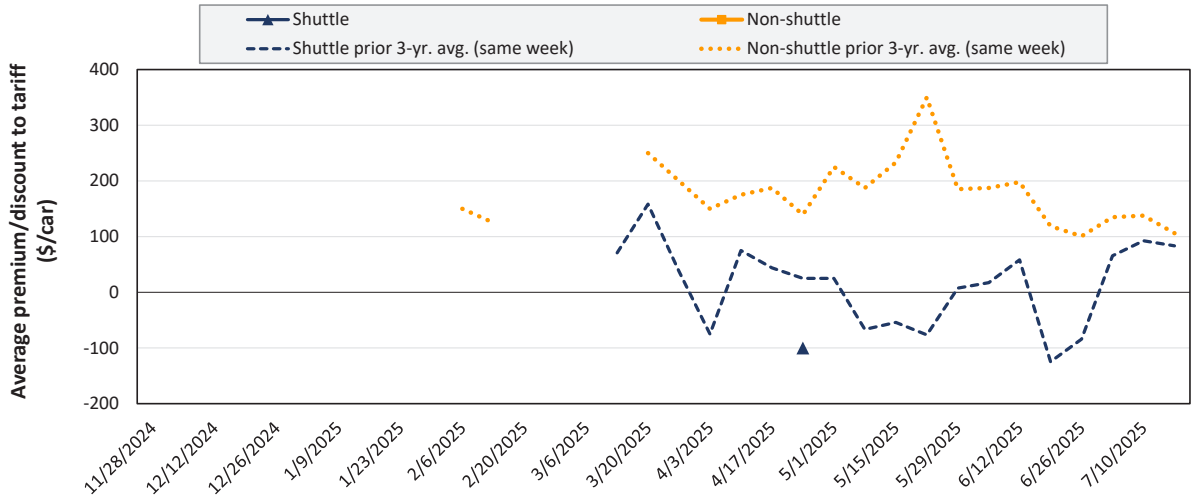
Average non-shuttle bids/offers fell $31 this week, and are $44 below the peak.

There were no shuttle bids/offers last week. Average shuttle bids/offers this week are $100 below the peak.

4/24/2025	BNSF	UP
Non-Shuttle	$100	$13
Shuttle	$0	-$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 July 2025



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

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

4/24/2025	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	-$100

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

Table 5. Weekly secondary railcar market (dollars per car)

For the week ending: 4/24/2025		Delivery period					
		Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sep-25
Non-shuttle	BNSF	n/a	225	100	n/a	n/a	n/a
	Change from last week	n/a	62	0	n/a	n/a	n/a
	Change from same week 2024	n/a	-150	-150	n/a	n/a	n/a
	UP	n/a	-100	13	n/a	n/a	n/a
	Change from last week	n/a	-100	-63	n/a	n/a	n/a
	Change from same week 2024	n/a	-100	-138	n/a	n/a	n/a
Shuttle	BNSF	-38	6	0	n/a	100	n/a
	Change from last week	-38	-44	n/a	n/a	n/a	n/a
	Change from same week 2024	13	38	75	n/a	288	n/a
	UP	-244	-213	-200	-100	n/a	n/a
	Change from last week	-19	-13	n/a	n/a	n/a	n/a
	Change from same week 2024	-144	-75	n/a	n/a	n/a	n/a
	CPKC	-50	-50	n/a	n/a	n/a	n/a
	Change from last week	0	-125	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	50	n/a	n/a	n/a	n/a

Note: Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

A tariff is a document issued by railroads that shows rules, rates, and charges for common carrier rail service. The tariff rate, together with fuel surcharges and any primary or secondary freight costs, constitutes the full cost of shipping grain by rail.

Table 6. Rail tariff rates for wheat shipments, May 2025

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	$5,632	$106.83	$5,738.83	$1.55	$56.99	3.0
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,091	$54.99	$4,145.99	$1.12	$41.17	5.9
	CP	Westby, MT	St. Louis, MO	Unit	$6,500	$372.12	$6,872.12	$1.86	$68.24	4.2
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,604	$63.99	$4,667.99	$1.26	$46.36	5.0
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,015	$135.09	$6,150.09	$1.66	$61.07	2.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,665	$26.46	$2,691.46	$0.73	$26.73	11.0
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,432	$137.61	$5,569.61	$1.51	$55.31	2.4
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,638	$114.03	$5,752.03	$1.55	$57.12	2.9
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,212	$93.42	$5,305.42	$1.43	$52.69	3.6
	CP	Minot, ND	Kalama, WA	Unit	$5,498	$393.68	$5,891.68	$1.59	$58.51	3.0
	CP	Nekoma, ND	Chicago, IL	Manifest	$4,830	$236.60	$5,066.60	$1.37	$50.31	4.6
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,847	$57.42	$3,904.42	$1.06	$38.77	6.3
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$4,197	$50.67	$4,247.67	$1.15	$42.18	5.9
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$6,695	$171.00	$6,866.00	$1.86	$68.18	n/a
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,727	$123.84	$5,850.84	$1.58	$58.10	2.6
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,782	$77.31	$4,859.31	$1.31	$48.26	4.4
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,605	$68.13	$4,673.13	$1.26	$46.41	4.9
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$4,091	$77.76	$4,168.76	$1.13	$41.40	5.2
	BNSF	Wichita, KS	Chicago, IL	DET	$4,217	$56.97	$4,273.97	$1.16	$42.44	5.7
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$4,411	$57.42	$4,468.42	$1.21	$44.37	5.4
	UP	Byers, CO	Houston, TX	Shuttle	$4,925	$348.90	$5,273.90	$1.43	$52.37	-8.7
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,876	$130.50	$5,006.50	$1.35	$49.72	4.0
	UP	Medford, OK	Houston, TX	Shuttle	$4,175	$172.20	$4,347.20	$1.17	$43.17	-9.4
	UP	Salina, KS	Houston, TX	Shuttle	$4,425	$229.50	$4,654.50	$1.26	$46.22	-9.2
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,591	$69.48	$4,660.48	$1.26	$46.28	4.8
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,239	$68.22	$4,307.22	$1.16	$42.77	5.3
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$29.97	$2,061.97	$0.56	$20.48	-1.7
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	$8,348	$0.00	$8,348.00	$2.26	$82.90	0.0
	CSX	Chicago, IL	Albany, NY	Unit	$7,413	$0.00	$7,413.00	$2.00	$73.61	0.0
	CSX	Chicago, IL	Buffalo, NY	Manifest	$5,924	$0.00	$5,924.00	$1.60	$58.83	0.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	$8,568	$0.00	$8,568.00	$2.32	$85.08	0.0

Note: Chicago, IL, serves as an interchange point between eastern and western Class I railroads. In the table above, all routes with Chicago as either an origin or destination are subject to "Rule 11"—meaning their rate must be combined with a tariff rate from another railroad. (For example, rates for Wichita, KS, to Albany, NY, would combine Wichita to Chicago and Chicago to Albany.) All rates (except Goodland, KS, to Kansas City, MO) are for railroad-owned, large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). The Goodland-to-Kansas City route is for small covered hoppers (C-113), which each carry 100 short tons (90.7 metric tons). A bushel of wheat weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. DET = Domestic Efficiency Trains. DET trains—on BNSF Railway (BNSF) only—are composed of 110 cars loaded at a single origin and split en route to multiple destinations. For mileage calculations, BNSF uses "Seattle, WA" for all Pacific Northwest (PNW) locations and "Houston, TX" for all Texas Gulf locations. HRS = hard red spring. HRW = hard red winter. CP = Canadian Pacific Railway. CSX = CSX Transportation. UP = Union Pacific Railroad. n/a = not available. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.
Source: BNSF, Canadian Pacific Kansas City, CSX, and UP.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, May 2025

Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	$5,800	$95.94	$5,895.94	$1.49	$58.55	3.2
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$151.56	$5,621.56	$1.42	$55.82	-5.6
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$159.84	$6,159.84	$1.55	$61.17	1.7
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$65.52	$5,105.52	$1.29	$50.70	4.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$158.31	$5,508.31	$1.39	$54.70	-5.9
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$84.15	$4,644.15	$1.17	$46.12	4.4
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$68.76	$4,868.76	$1.23	$48.35	4.6
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$84.33	$4,624.33	$1.17	$45.92	4.4
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$127.71	$5,557.71	$1.40	$55.19	-5.2
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$149.94	$5,579.94	$1.41	$55.41	-5.6
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.60	$23.58	5.5
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.69	$27.35	4.7
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,047	$452.76	$5,499.76	$1.39	$54.62	-5.2
	CP	Glenwood, MN	Boardman, OR	Railroad	$5,513	$435.68	$5,948.68	$1.50	$59.07	0.1
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$5,961	$0.00	$5,961.00	$1.50	$59.20	0.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,139	$0.00	$6,139.00	$1.55	$60.96	0.0
	CSX	Olney, IL	Fairmount, GA	Railroad	$4,706	$0.00	$4,706.00	$1.19	$46.73	0.0
	KCS	Delhi, LA	Morton, MS	Railroad	$1,342	$44.40	$1,386.40	$0.35	$13.77	-0.8
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$207.30	$4,292.30	$1.08	$42.62	5.3
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$471.60	$6,476.60	$1.63	$64.32	2.2
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$521.10	$6,686.10	$1.69	$66.40	1.9
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$214.20	$5,219.20	$1.32	$51.83	4.3
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$352.80	$6,037.80	$1.52	$59.96	3.0
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$216.90	$4,441.90	$1.12	$44.11	5.1
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$137.52	$6,272.52	$1.70	$62.29	-4.8
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$132.21	$6,217.21	$1.68	$61.74	-4.8
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$76.95	$3,476.95	$0.94	$34.53	-25.3
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$146.16	$6,331.16	$1.71	$62.87	-4.9
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$6,235	$149.94	$6,384.94	$1.73	$63.41	-5.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.64	$23.58	5.8
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.74	$27.35	5.0
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,785	$452.76	$6,237.76	$1.69	$61.94	-4.6
	CP	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$346.05	$3,872.05	$1.05	$38.45	-2.9
	CSX	Casey, IL	Mobile, AL	Private	$3,646	$0.00	$3,646.00	$0.99	$36.21	3.7
	CSX	Marion, OH	Chesapeake, VA	Private	$3,214	$0.00	$3,214.00	$0.87	$31.92	2.6
	UP	Canton, KS	Houston, TX	Railroad	$5,150	$224.10	$5,374.10	$1.45	$53.37	4.1
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$468.60	$6,608.60	$1.79	$65.63	2.2
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$323.40	$5,833.40	$1.58	$57.93	3.2
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$369.30	$5,959.30	$1.61	$59.18	2.9

Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. For mileage calculations, BNSF Railway (BNSF) uses "Seattle, WA" for all Pacific Northwest (PNW) locations and "Houston, TX" for all Texas Gulf locations. CN = Canadian National Railway. CP = Canadian Pacific Railway. CSX = CSX Transportation. KCS = Kansas City Southern Railway. UP = Union Pacific Railroad. n/a = not available. Although CP and KCS have merged into Canadian Pacific Kansas City (CPKC), their public tariffs currently remain separate. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.

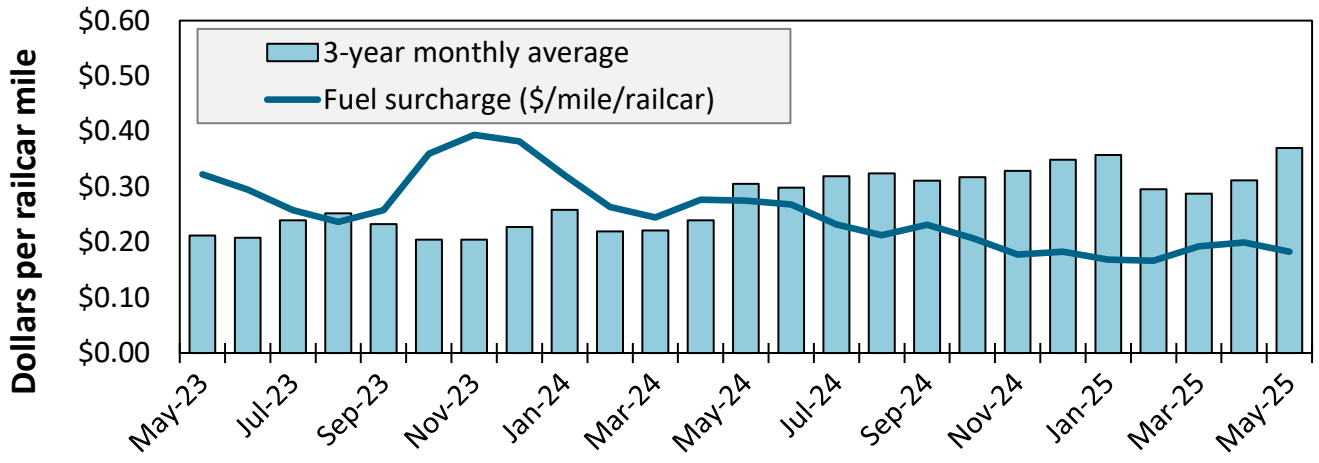
Source: BNSF, CN, CPKC, CSX, and UP.

Table 8. Tariff rail rates for U.S. bulk grain shipments to Mexico, May 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	$4,675	$46.01	$1.17	-0.6	3.5
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,552	$54.64	$1.39	-0.5	-0.5
	Council Bluffs, IA	Laredo, TX	KCS	Non-shuttle	$6,076	$59.80	$1.52	-0.5	-0.8
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,459	$53.73	$1.36	-0.5	-0.5
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,672	$55.82	$1.42	-0.5	-0.6
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,686	$46.12	$1.17	-0.6	3.2
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,068	$49.88	$1.27	-0.5	3.4
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,203	$51.21	$1.30	-0.5	3.2
Soybeans	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,091	$50.11	$1.27	-0.4	3.9
	Atchison, KS	Laredo, TX	KCS	Non-shuttle	$5,552	$54.64	$1.49	-0.5	-0.5
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,615	$65.11	$1.77	-0.4	2.7
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,459	$53.73	$1.46	-0.5	-0.5
	Marshall, MO	Laredo, TX	KCS	Non-shuttle	$5,672	$55.82	$1.52	-0.5	-0.6
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,717	$66.11	$1.80	-0.4	2.5
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,980	$39.17	$1.07	-0.6	-0.1
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$3,562	$35.06	$0.95	-0.7	0.4
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,799	$47.23	$1.29	-0.4	-9.1
	Kansas City, MO	Laredo, TX	KCS	Non-shuttle	$5,459	$53.73	$1.46	-0.5	-0.5
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,586	$45.14	$1.23	-0.3	-9.3

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).

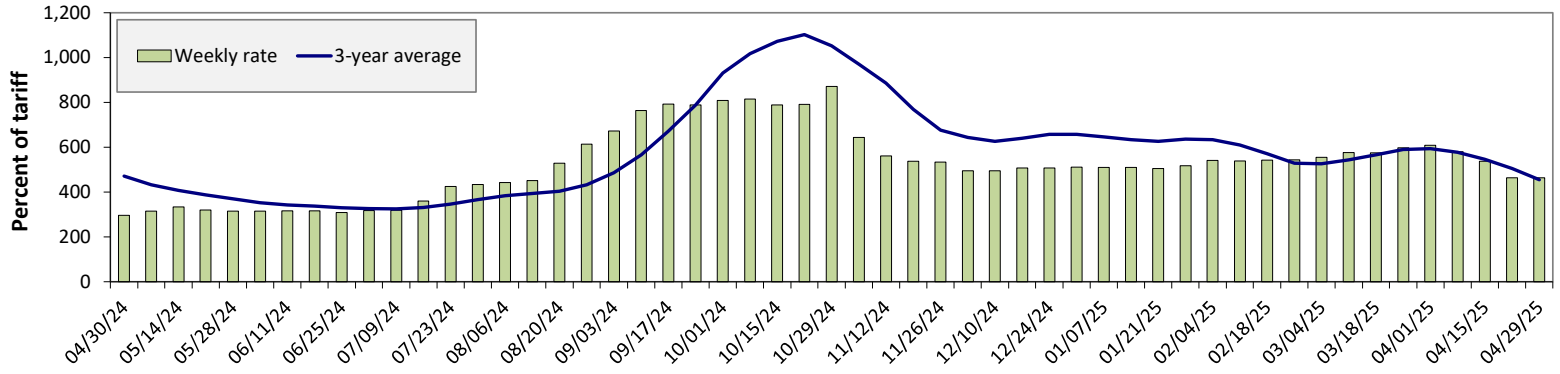
Figure 9. Railroad fuel surcharges, North American weighted average



May 2025: $0.18/mile, down 2 cents from last month’s surcharge of $0.2/mile; down 10 cents from the May 2024 surcharge of $0.28/mile; and down 19 cents from the May prior 3-year average of $0.37/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 29: there is no change from the previous week; 57 percent higher than last year; and 2 percent higher than the 3-year average.

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

Table 9. Weekly barge freight rates: southbound only

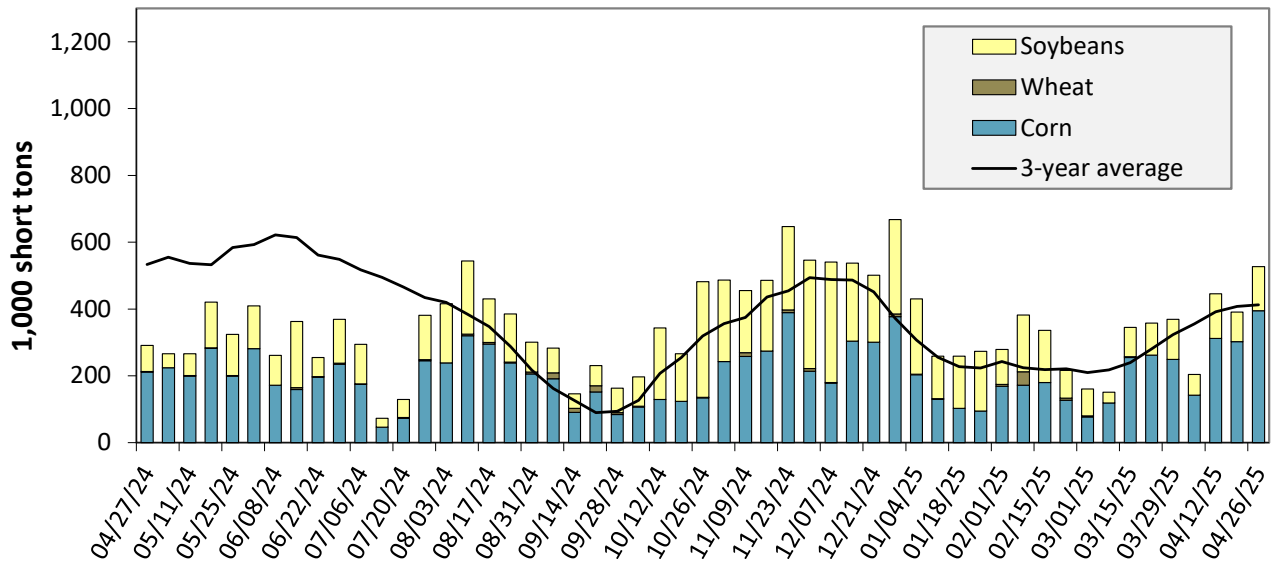
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	4/29/2025	536	493	464	351	343	304
	4/22/2025	553	513	464	349	375	326
$/ton	4/29/2025	33.18	26.23	21.53	14.00	16.09	9.55
	4/22/2025	34.23	27.29	21.53	13.93	17.59	10.24
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	64	65	57	66	39	54
	3-year avg.	1	0	2	0	-16	-5
Rate	May	505	478	451	336	334	295
	July	477	424	408	312	313	284

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 26: 81 percent higher than last year and 28 percent higher than the 3-year average.

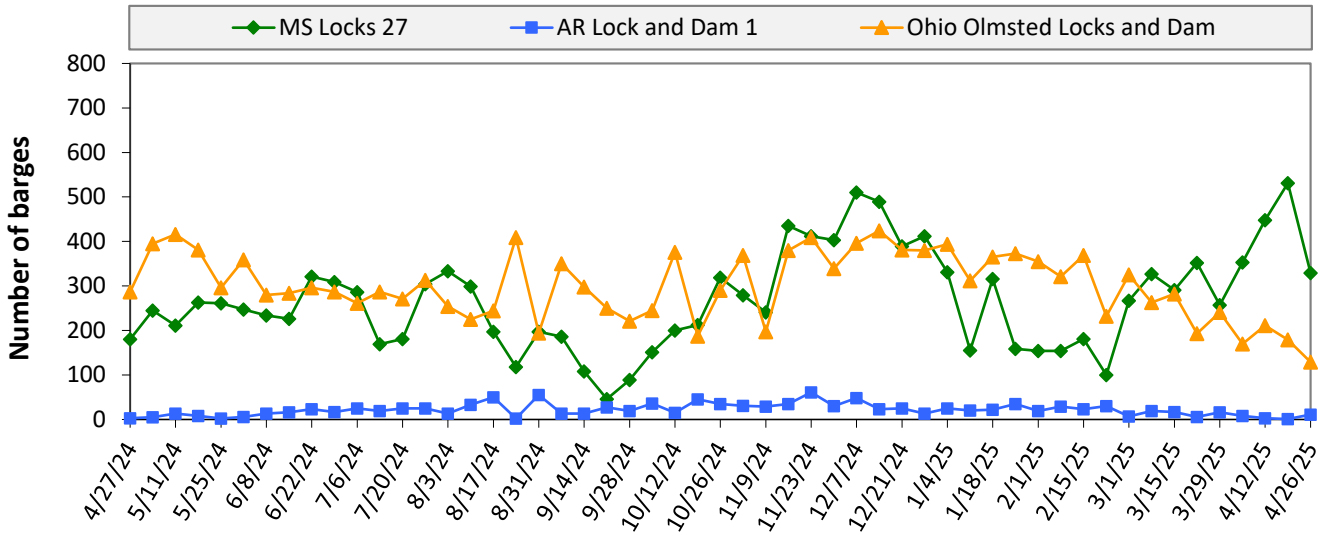
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 04/26/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	186	0	47	0	233
Mississippi River (Winfield, MO (L25))	279	0	78	0	357
Mississippi River (Alton, IL (L26))	374	0	98	0	472
Mississippi River (Granite City, IL (L27))	395	0	132	0	527
Illinois River (La Grange)	163	0	32	0	195
Ohio River (Olmsted)	53	7	68	4	132
Arkansas River (L1)	0	8	3	0	11
Weekly total - 2025	448	16	203	4	670
Weekly total - 2024	320	19	97	7	442
2025 YTD	5,427	315	3,706	78	9,525
2024 YTD	4,077	584	4,202	78	8,941
2025 as % of 2024 YTD	133	54	88	100	107
Last 4 weeks as % of 2024	130	43	103	58	113
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.

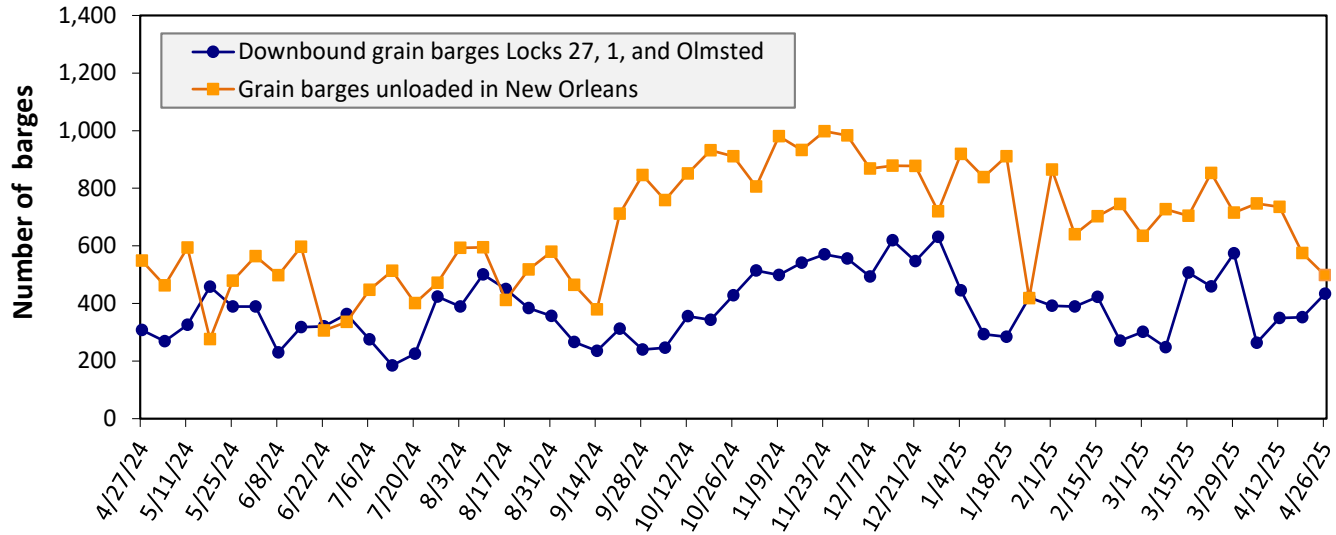
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending April 26: 469 barges transited the locks, 242 barges fewer than the previous week, and 24 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 26: 434 barges moved down river, 82 more than the previous week; 498 grain barges unloaded in the New Orleans Region, 13 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.

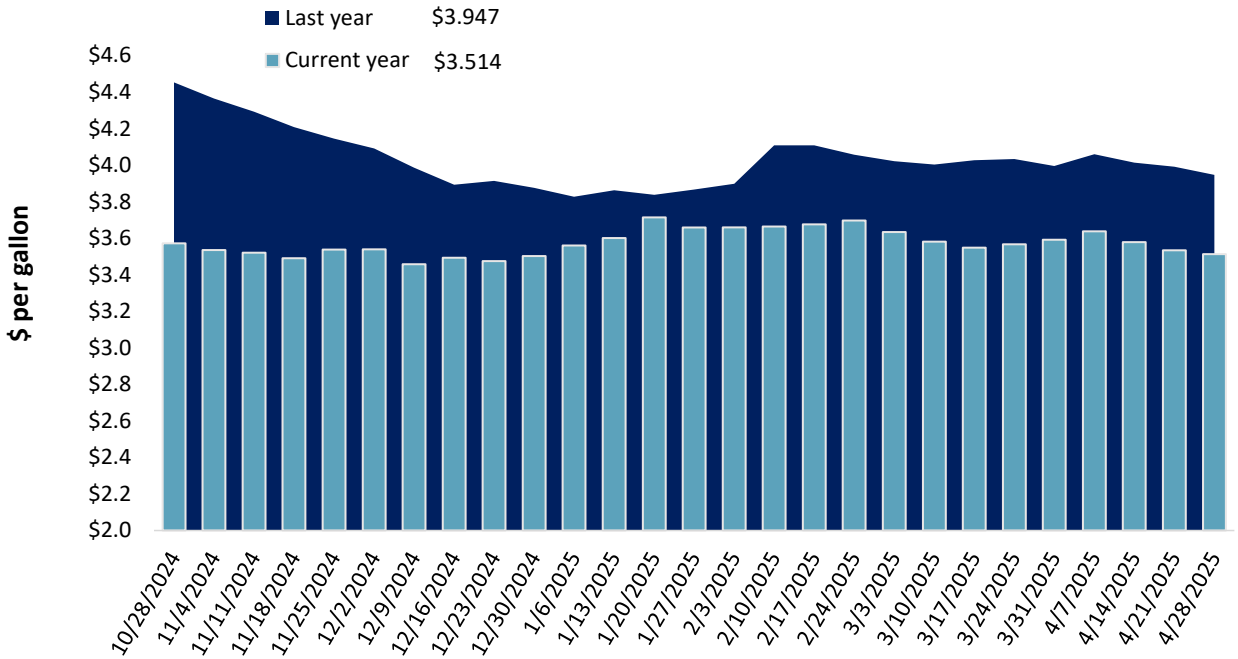
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 4/28/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.585	-0.029	-0.440
	New England	3.908	-0.025	-0.401
	Central Atlantic	3.806	-0.013	-0.428
	Lower Atlantic	3.470	-0.035	-0.449
II	Midwest	3.456	-0.019	-0.426
III	Gulf Coast	3.183	-0.012	-0.474
IV	Rocky Mountain	3.470	-0.007	-0.317
V	West Coast	4.224	-0.026	-0.401
	West Coast less California	3.777	-0.036	-0.333
	California	4.740	-0.015	-0.476
Total	United States	3.514	-0.020	-0.433

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 28, the U.S. average diesel fuel price decreased 2.0 cents from the previous week to $3.514 per gallon, 43.3 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 4/17/2025	1,050	352	920	836	46	3,205	17,549	4,294	25,047
	This week year ago	622	645	823	477	25	2,591	14,146	3,388	20,125
	Last 4 wks. as % of same period 2023/24	242	81	172	242	293	182	134	127	138
Current shipped (cumulative) exports sales	2024/25 YTD	4,348	2,781	5,764	4,875	305	18,074	40,185	42,762	101,021
	2023/24 YTD	3,031	3,652	5,575	3,489	479	16,226	31,830	38,105	86,162
	YTD 2024/25 as % of 2023/24	143	76	103	140	64	111	126	112	117
	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 4/17/2025	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	19,820	19,138	4	17,746
Japan	10,092	8,153	24	9,366
China	33	2,126	-98	8,233
Colombia	5,891	4,766	24	4,383
Korea	4,310	1,911	126	1,565
Top 5 importers	40,145	36,094	11	41,293
Total U.S. corn export sales	57,734	45,976	26	51,170
% of YTD current month's export projection	89%	79%	-	-
Change from prior week	1,153	1,298	-	-
Top 5 importers' share of U.S. corn export sales	70%	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 4/17/2025	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	22,338	23,823	-6	28,636
Mexico	4,460	4,498	-1	4,917
Japan	1,697	1,787	-5	2,231
Egypt	2,766	717	286	2,228
Indonesia	1,497	1,577	-5	1,910
Top 5 importers	32,757	32,402	1	39,922
Total U.S. soybean export sales	47,056	41,494	13	51,302
% of YTD current month's export projection	95%	90%	-	-
Change from prior week	277	211	-	-
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 4/17/2025	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	3,919	3,225	22	3,298
Philippines	2,602	2,845	-9	2,494
Japan	2,109	1,956	8	2,125
China	139	2,112	-93	1,374
Korea	2,395	1,353	77	1,274
Taiwan	1,013	1,102	-8	921
Nigeria	719	243	196	920
Thailand	892	460	94	552
Colombia	474	304	56	522
Vietnam	645	420	54	313
Top 10 importers	14,907	14,019	6	13,792
Total U.S. wheat export sales	21,278	18,817	13	18,323
% of YTD current month's export projection	95%	98%	-	-
Change from prior week	-145	82	-	-
Top 10 importers' share of U.S. wheat export sales	70%	75%	-	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.

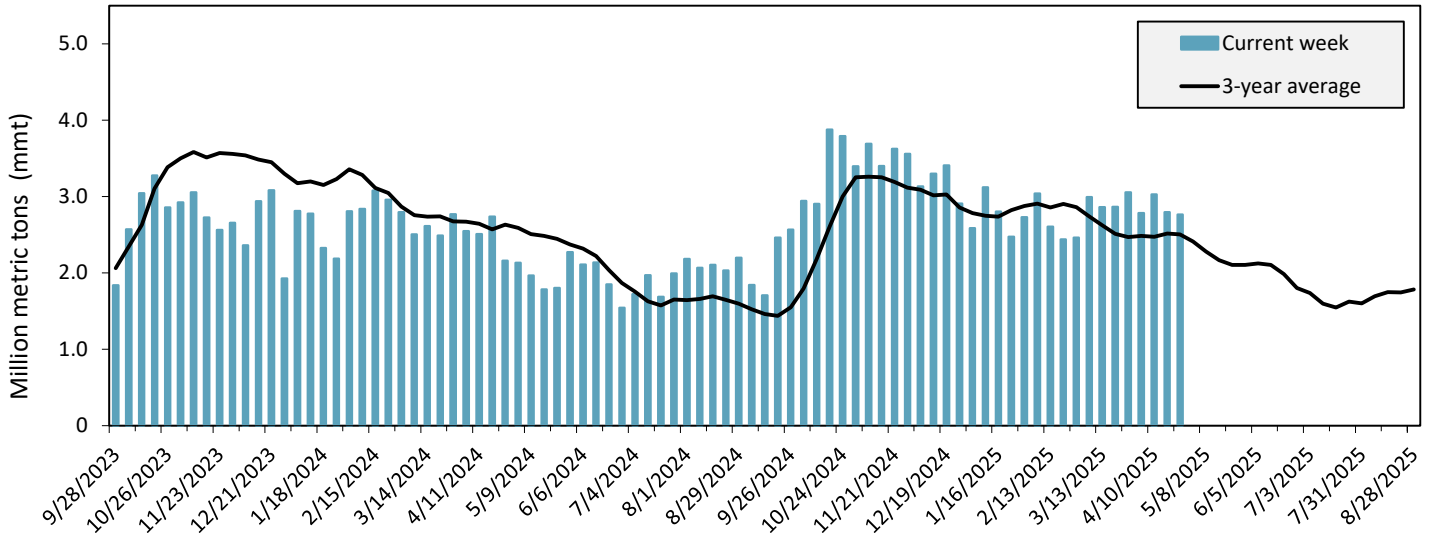
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 04/24/2025	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	520	695	75	8,262	6,161	134	115	164	13,987
	Soybeans	106	68	157	1,898	2,458	77	301	103	10,445
	Wheat	292	341	86	3,467	3,544	98	86	136	11,453
	All grain	918	1,104	83	13,716	12,852	107	106	138	37,186
Mississippi Gulf	Corn	845	706	120	12,222	8,208	149	131	103	27,407
	Soybeans	213	329	65	8,869	9,660	92	141	102	29,741
	Wheat	86	64	136	1,179	1,965	60	70	102	4,523
	All grain	1,145	1,099	104	22,270	19,889	112	126	103	61,789
Texas Gulf	Corn	0	0	n/a	105	178	59	n/a	n/a	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	142	70	202	1,097	564	195	179	149	1,940
	All grain	142	70	202	1,392	2,239	62	63	65	6,965
Interior	Corn	288	325	89	4,045	4,383	92	101	140	13,463
	Soybeans	116	158	74	2,147	2,570	84	114	120	8,059
	Wheat	78	16	503	925	877	105	118	114	2,952
	All grain	505	498	101	7,245	7,937	91	108	133	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	21	20	106	74	100	74	74	110	653
	All grain	21	20	106	74	100	74	74	57	1,060
Atlantic	Corn	2	0	n/a	124	150	82	72	105	410
	Soybeans	3	5	59	429	419	102	85	16	1,272
	Wheat	27	0	n/a	27	10	260	n/a	239	73
	All grain	32	5	609	580	579	100	119	53	1,754
All Regions	Corn	1,655	1,726	96	24,757	19,080	130	117	125	56,109
	Soybeans	439	560	78	13,552	15,160	89	140	101	50,865
	Wheat	647	510	127	6,769	7,061	96	95	128	21,594
	All grain	2,763	2,797	99	45,380	43,650	104	111	114	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.

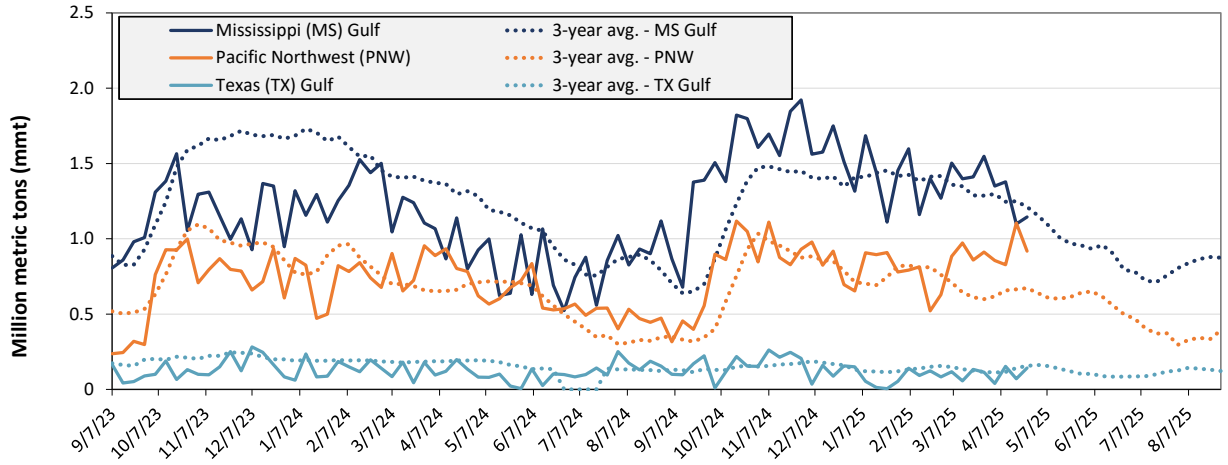
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Apr. 24: 2.8 mmt of grain inspected, unchanged from the previous week, up 27 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 04/24/25 inspections (mmt):
MS Gulf: 1.15
PNW: 0.92
TX Gulf: 0.14

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 4	up 102	up 10	down 17
Last year (same 7 days)	up 38	up 6	up 34	up 23
3-year average (4-week moving average)	down 6	down 9	down 6	up 37

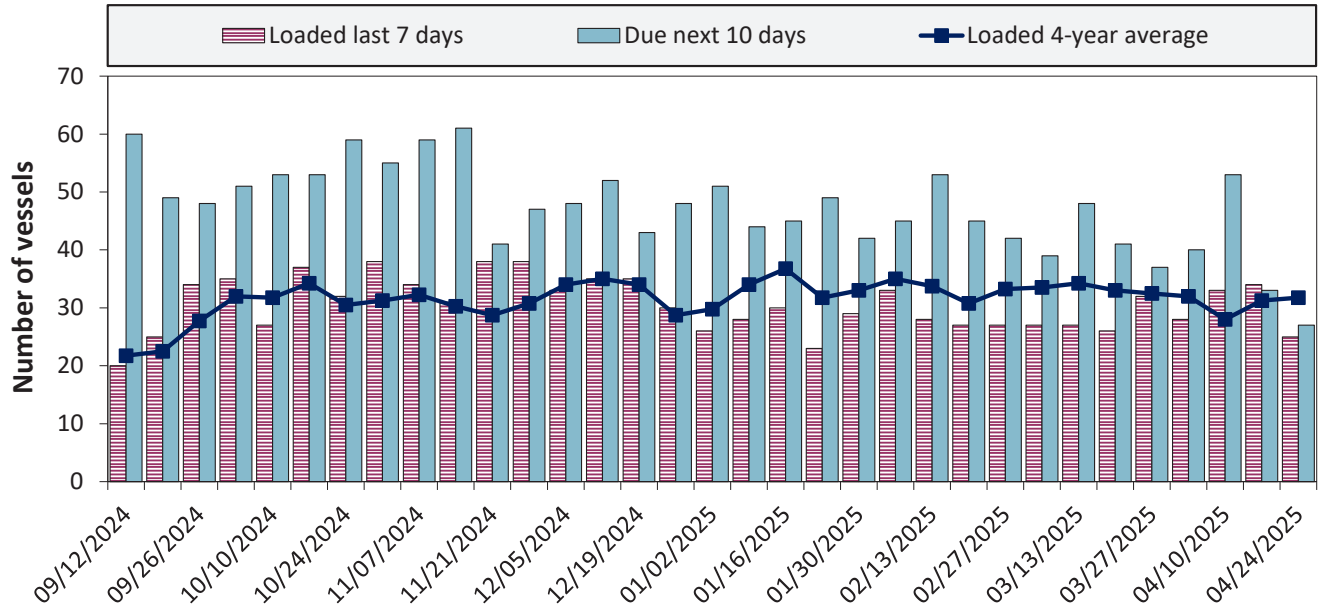
Source: USDA, Federal Grain Inspection Service.

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
4/24/2025	28	25	27	20
4/17/2025	26	34	33	19
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.

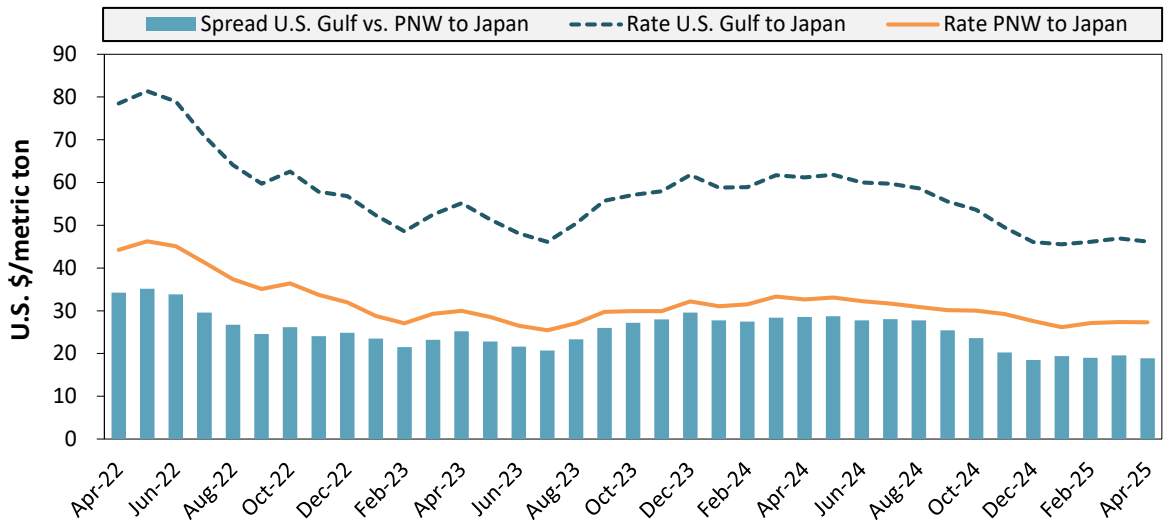
Figure 19. U.S. Gulf vessel loading activity



Week ending 04/24/25, number of vessels	Loaded	Due
Change from last year	4%	-27%
Change from 4-year average	-21%	-34%

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
April 2025	$46	$27	$19
Change from April 2024	-25%	-16%	-34%
Change from 4-year average	-28%	-23%	-34%

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

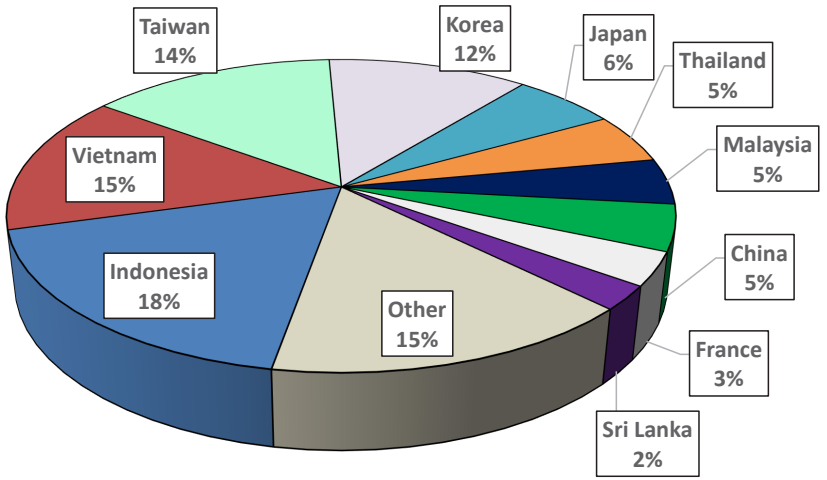
Table 20. Ocean freight rates for selected shipments, week ending 4/26/2025

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, 2025	33,400	89.01
PNW	Japan	Corn	Apr 22. 2025	Jun 1/10, 2025	65,000	34.75
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	N. China	Heavy grain	Apr 22. 2025	May 1/7, 2025	63,000	33.00
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

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.

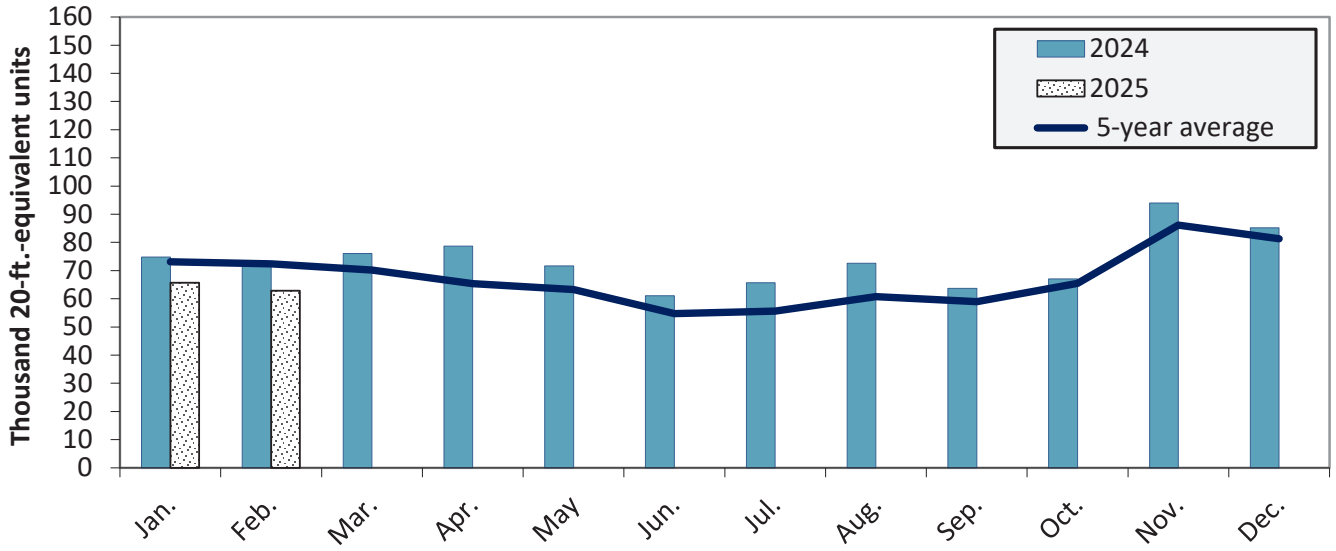
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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