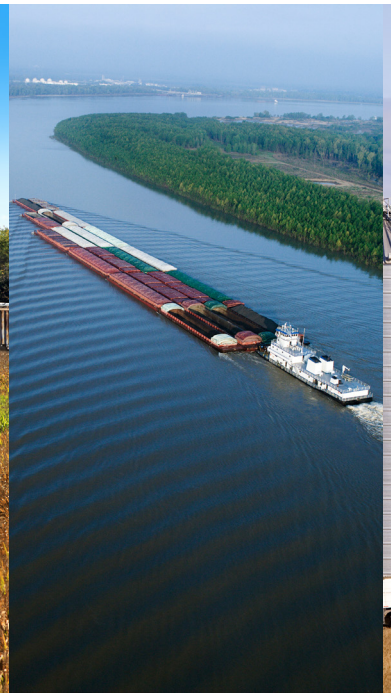
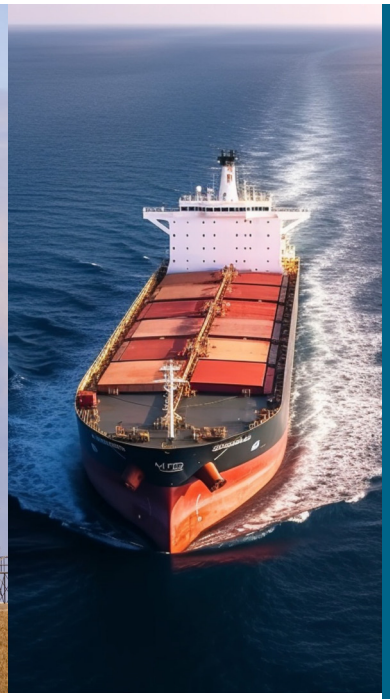
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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BNSF Holds First Auction for MY 2025/26 Shuttle Trains. On May 14, BNSF Railway (BNSF) held the first of three auctions—for yearlong shuttle train contracts—that the railroad has scheduled ahead of the new marketing year (MY). (The remaining two auctions are scheduled for May 21 and 28, and BNSF will hold additional auctions in the fall.) BNSF will offer a total of 140 shuttles in MY 2025/26—the same number as last year.

In its May 14 auction, BNSF sold 36 shuttles for $19.7 million. The winning bids ranged from $351,870 to $930,010, and they averaged $547,000. Assuming an average of 2.5 turns per month, a $547,000 yearlong shuttle contract represents about $166 per car, per trip. These values are lower than last year's auctions.

Last year (ahead of MY 2024/25), BNSF reduced its shuttle offerings from 155 to 140, and shippers responded by bidding up shuttle values—revealing a perceived scarcity. Over the course of six auctions last year, BNSF collected $130.6 million in total revenue—or an average premium of $932,000 per shuttle contract (*Grain Transportation Report, November 21, 2024*).

Nominations Requested for Inland Waterways Users Board. On May 5, the Department of the Army requested nominations for 11 representative organizations to serve on the Inland Waterways Users Board (IWUB), sponsored by the U.S. Army Corps of Engineers. The new representatives' appointment term will begin by January 30, 2026. The IWUB provides independent advice and recommendations to the Secretary of the Army and the U.S. Congress.

The Secretary of Defense will have final approval of the 11 representative organizations recommended by the Secretary of the Army. The deadline for submitting nominations is June 15, 2025. For additional information about the Board, please visit its website.

U.S.-UK Trade Agreement Raises Ethanol Exports/Transportation. Last week, the White House completed a trade deal with the United Kingdom (UK) that expands market access for U.S. farmers and ethanol producers, likely boosting shipments of ethanol exports.

Under the agreement, the United States will receive a tariff-free quota for U.S. ethanol of 368 million gallons—a volume that equates to over $700 million in exports. Following the UK's 226.6-million-gallon purchases in the 2023-24 marketing year, the new trade deal reinforces the UK's status as the second-largest importer of U.S. ethanol.

Overall, the deal is expected to generate export opportunities worth up to $5 billion for U.S. farmers, ranchers, and producers.

FMCSA Declares Regional Emergency for Iowa, Kansas, and Nebraska. On May 13, the Federal Motor Carrier Safety Administration (FMCSA) declared a regional emergency in Iowa, Kansas, and Nebraska in response to the widespread fuel shortages impacting agricultural operations. The emergency declaration waives hours-of-service (HOS) regulations for motor carriers and drivers transporting diesel and biodiesel blends until June 30, 2025, or the end of the emergency, whichever is earlier.

The regional declaration extends the fuel-shortage-related emergency declarations (April 30-May 9) issued by State Governors of Iowa, Kansas, and Nebraska. Each of these declarations resulted in up to 14 days of emergency relief from HOS regulations.

The shortages resulted from several factors, including increased fuel demand for the spring planting season, refinery conversion to summer blends, pipeline maintenance in key supply corridors, and outages at terminals.

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 May 1, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 23.42 million metric tons (mmt), down 2 percent from last week and up 26 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.66 mmt, up 64 percent from last week. Net **soybean export sales** were 0.38 mmt, down 12 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.07 mmt, down 3 percent from last week.

Rail

U.S. Class I railroads originated 26,068 **grain carloads** during the week ending May 3. This was an 11-percent decrease from the previous week, 5 percent more than last year, and 6 percent more than the 3-year average.

Average May **shuttle secondary railcar bids/offers** (per car) were $109 below tariff for the week ending May 8. This was $46 more than last week and $159 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $275 above tariff. This was $194 more than last week and $125 lower than this week last year.

Barge

For the week ending May 10, **barged grain movements** totaled 739,150 tons. This was 5 percent less than the previous week and 51 percent more than the same period last year.

For the week ending May 10, 475 grain barges **moved down river**—28 fewer than last week. There were 483 grain barges **unloaded** in the New Orleans region, 7 percent more than last week.

Ocean

For the week ending May 8, 22 **oceangoing grain vessels** were loaded in the Gulf—19 percent fewer than the same period last year. Within the next 10 days (starting May 9), 32 vessels were expected to be loaded—10 percent more than the same period last year.

As of May 8, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $46.25, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $27.25 per mt, unchanged from the previous week.

Fuel

For the week ending May 12, the U.S. average **diesel price** decreased 2.1 cents from the previous week, to $3.476 per gallon—37.2 cents below the same week last year.

First-Quarter 2025 Wheat Total Landed Costs

From fourth quarter 2024 to first quarter 2025 (quarter to quarter), transportation costs rose for shipping wheat to Japan from Kansas (KS) and North Dakota (ND) through the Pacific Northwest (PNW routes), as well as from both State origins through the U.S. Gulf (Gulf routes). From first quarter 2024 to first quarter 2025 (year to year), transportation costs rose for the PNW routes and fell for the Gulf routes. Quarter to quarter, total landed costs (farm value plus transportation costs) were up for most routes. Year to year, total landed costs were down for all routes.

Quarter to quarter, rising wheat farm values raised total landed costs for both the ND-Gulf and ND-PNW routes, while total landed costs from Kansas showed opposing trends—rising for the KS-PNW route and falling for the KS-Gulf route. Year to year, falling wheat farm values lowered total landed costs for PNW routes, and both lower farm values and lower ocean freight rates drove declines in total landed costs for Gulf routes. Total U.S. wheat inspected for export to Japan was up from quarter to quarter and year to year.

Transportation Costs

Quarter to Quarter. Quarter to quarter, to ship wheat to Japan via the PNW, transportation costs rose 1 percent for the KS-PNW route and rose 2 percent for the ND-PNW route. To Japan via the U.S. Gulf, transportation costs rose less than 1 percent

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

Mode	Kansas					North Dakota				
	2024 1st qtr	2024 4th qtr	2025 1st qtr	Year-to-year change	Quarterly change	2024 1st qtr	2024 4th qtr	2025 1st qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	16.11	17.87	21.69	34.64	21.38	16.11	17.87	21.69	34.64	21.38
Rail	65.06	68.31	68.00	4.52	-0.45	57.31	58.93	58.81	2.62	-0.20
Ocean vessel	31.96	28.96	26.89	-15.86	-7.15	31.96	28.96	26.89	-15.86	-7.15
Transportation costs	113.13	115.14	116.58	3.05	1.25	105.38	105.76	107.39	1.91	1.54
Farm value	212.50	196.33	195.35	-8.07	-0.50	254.39	207.60	217.28	-14.59	4.66
Total landed cost	325.63	311.47	311.93	-4.21	0.15	359.77	313.36	324.67	-9.76	3.61
Transport % of landed cost	34.74	36.97	37.37	7.58	1.10	29.29	33.75	33.08	12.92	-2.00

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

Mode	Kansas					North Dakota				
	2024 1st qtr	2024 4th qtr	2025 1st qtr	Year-to-year change	Quarterly change	2024 1st qtr	2024 4th qtr	2025 1st qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	16.11	17.87	21.69	34.64	21.38	16.11	17.87	21.69	34.64	21.38
Rail	45.89	46.37	46.25	0.78	-0.26	54.05	55.41	55.16	2.05	-0.45
Ocean vessel	59.82	49.70	46.19	-22.79	-7.06	59.82	49.70	46.19	-22.79	-7.06
Transportation costs	121.82	113.94	114.13	-6.31	0.17	129.98	122.98	123.04	-5.34	0.05
Farm value	212.50	196.33	195.35	-8.07	-0.50	254.39	207.60	217.28	-14.59	4.66
Total landed cost	334.32	310.27	309.48	-7.43	-0.25	384.37	330.58	340.32	-11.46	2.95
Transport % of landed cost	36.44	36.72	36.88	1.21	0.42	33.82	37.20	36.15	6.91	-2.81

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

each for the KS-Gulf and ND-Gulf routes. Quarter to quarter, rises in truck freight rates were the main driver behind the slightly higher transportation costs for all routes.

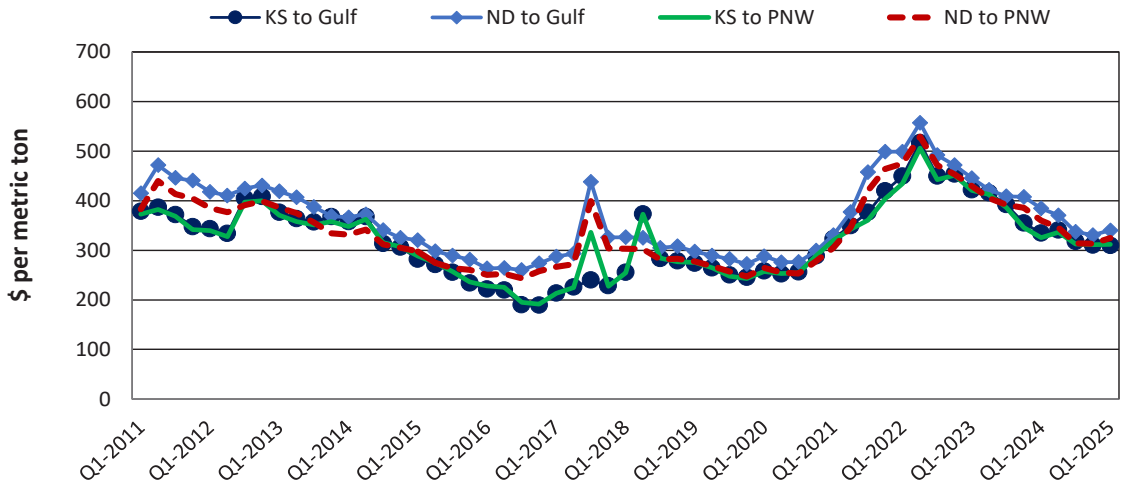
Year to Year. Year to year, transportation costs were up 3 percent for the KS-PNW route and up 2 percent for the ND-PNW route. Meanwhile, via the U.S. Gulf, costs fell 6 percent for the KS-Gulf route and fell 5 percent for the ND-Gulf route (tables 1 and 2). Year to year, higher trucking and rail freight rates raised transportation costs for PNW routes, while lower ocean freight rates pushed down transportation costs for Gulf routes (tables 1 and 2).

Ocean Freight Rates. Quarter to quarter, ocean freight rates for shipping wheat to Japan fell 7 percent via the PNW routes and Gulf routes (tables 1 and 2). This decrease was mainly due to a seasonal dip in demand for bulk shipping caused by various holidays around the world (***Grain Transportation Report, May 8, 2025***).

Year to year, ocean freight rates fell 16 percent for PNW routes and fell 23 percent for Gulf routes.

Truck Rates. Quarter to quarter, trucking freight rates for transporting grain to a local elevator in both Kansas and North Dakota rose 21 percent, partly because of higher diesel prices. Year to year, trucking freight rates rose 35 percent. Both quarter to quarter and year to year, in the North Central region (which includes Kansas and North Dakota), truck availability was down, while truck use was up.

Figure 1. Kansas and North Dakota wheat total landed costs, 2011-25



Note: Gulf = U.S. Gulf; PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.
Source: USDA, Agricultural Marketing Service.

The combination of limited supply and rising demand contributed to higher truck freight rates for both periods (***Grain Truck and Ocean Rate Advisory, First Quarter 2025***).

Rail Tariff Rates. Quarter to quarter, rail freight rates (i.e., tariff plus fuel surcharge) for shipping wheat to the PNW were down less than 1 percent from Kansas and North Dakota origins (tables 1 and 2). Year to year, rail rates to the PNW rose 5 percent from Kansas and rose 3 percent from North Dakota.

Quarter to quarter, rail rates for shipping wheat to the Gulf were down less than 1 percent from Kansas and North Dakota. Year to year, rail rates to the Gulf were up 1 percent from Kansas and up 2 percent from North Dakota.

Total Landed Costs

First-quarter 2025 total landed costs for shipping wheat via the PNW and Gulf routes ranged from $309 per mt to $340 per mt. Figure 1 shows landed costs for wheat for each route over time.

Kansas. Quarter to quarter, total landed costs for shipping wheat to Japan rose less than 1 percent via the KS-PNW route and fell less than 1 percent via KS-Gulf routes, as Kansas farm values slightly fell (tables 1 and 2). Year to year, landed costs decreased 4 percent for the KS-PNW route and fell 7 percent for the KS-Gulf route, because of lower farm values. For each of the Kansas-originated routes,

first-quarter transportation costs represented 37 percent of total landed costs: this share was up quarter to quarter and year to year for both routes.

North Dakota. Quarter to quarter, total landed costs were up 4 percent for the ND-PNW route and up 3 percent for the ND-Gulf route, reflecting higher farm values and truck freight rates. Year to year, landed cost decreases of 10 percent for the ND-PNW route and 11 percent for the ND-Gulf route reflected lower ocean freight rates, as well as lower farm values. First-quarter transportation costs represented 33 percent of total landed costs for the ND-PNW route and 36 percent for the ND-Gulf route, which were down from the previous quarter and up from last year.

Export Projections

According to USDA's Federal Grain Inspection Service, first-quarter 2025 inspections of wheat for export to Japan totaled 0.62 million metric tons (mmt)—up 35 percent quarter to quarter and up 19 percent year to year. First-quarter 2025 wheat exports to Japan represented 12 percent of total estimated U.S. wheat exports for the quarter (**USDA, Federal Grain and Inspection Service**).

As of May 1, 2025, current year-to-date outstanding (unshipped) export balances of wheat were up 34 percent from the same time in 2024, while cumulative (shipped) exports were up 12 percent from the same time in 2024 (**GTR table 14**). According to USDA's May ***World Agricultural Supply and Demand Estimates (WASDE) report***, U.S. wheat exports for marketing year (MY) 2024/25 are projected to be 22.32 mmt, up 16 percent from MY 2023/24 estimates (19.24 mmt).

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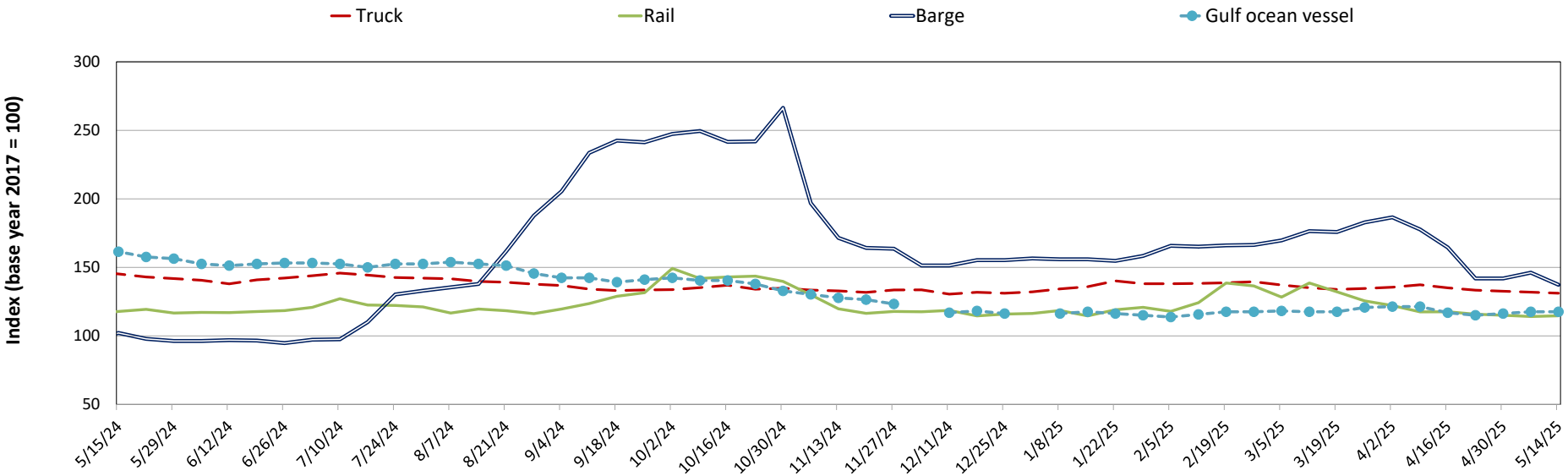
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
05/14/25	131	115	137	118	129
05/07/25	132	114	146	118	129
05/15/24	145	118	102	161	162

Note: Base year 2017 = 100. Weekly updates include truck = diesel ($/gallon); rail = near-month secondary rail market value and monthly tariff rate with fuel surcharge for select shuttle train routes ($/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.

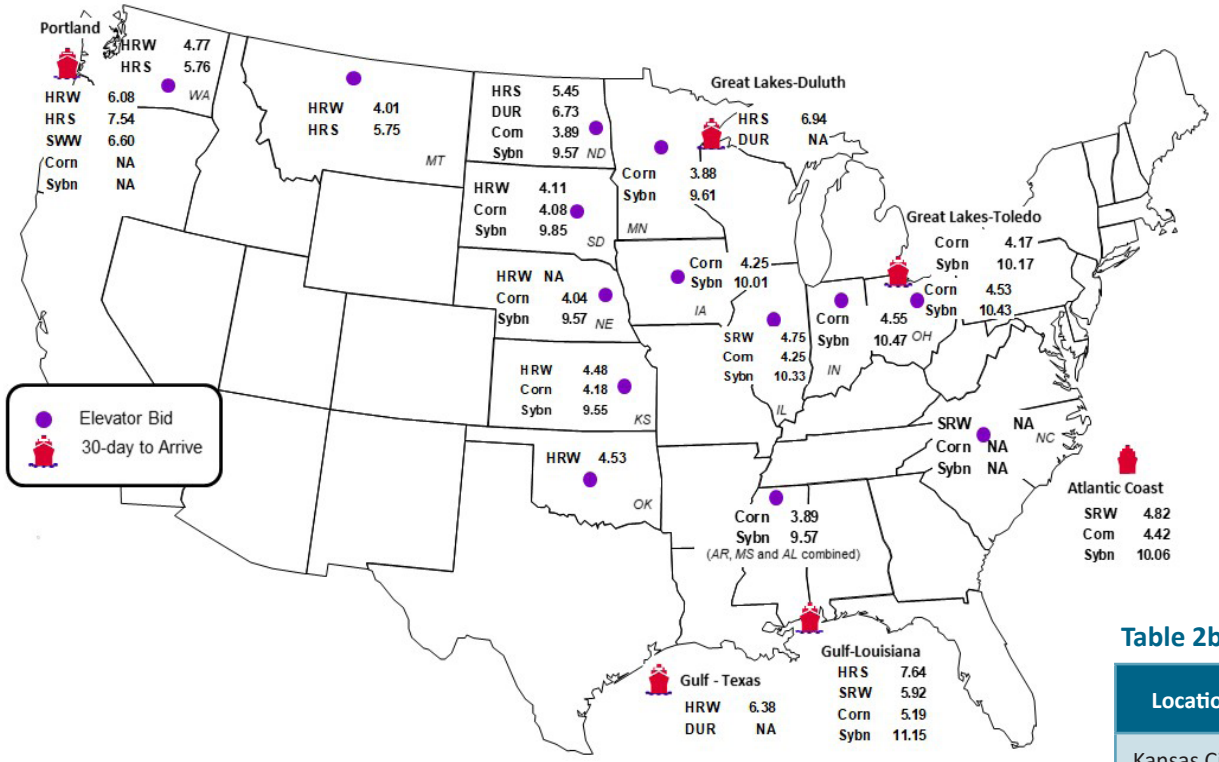
Figure 1. Grain transportation cost indicators as of week ending 5/14/25



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	5/9/2025	5/2/2025
Corn	IL–Gulf	-0.94	-0.91
Corn	NE–Gulf	-1.15	-1.18
Soybean	IA–Gulf	-1.14	-1.24
HRW	KS–Gulf	-1.90	-1.89
HRS	ND–Portland	-2.09	-2.09

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	5/9/2025	Week ago 5/2/2025	Year ago 5/10/2024
Kansas City	Wheat	July	5.176	5.412	6.914
Minneapolis	Wheat	July	5.934	6.110	7.200
Chicago	Wheat	July	5.216	5.430	6.810
Chicago	Corn	July	4.498	4.688	4.730
Chicago	Soybean	July	10.518	10.574	12.224

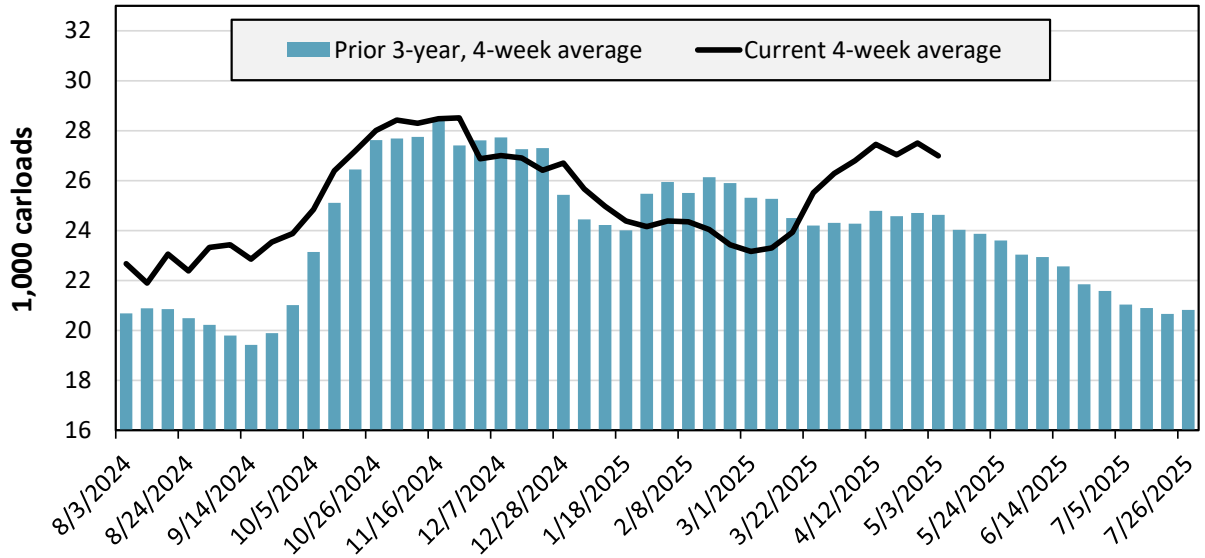
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 5/03/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,665	2,443	11,417	5,678	2,857	2,008	26,068
This week last year	1,998	2,810	11,080	5,837	2,475	708	24,908
2025 YTD	29,998	51,624	199,186	104,138	45,452	25,474	455,872
2024 YTD	30,469	48,138	195,414	95,736	52,403	17,983	440,143
2025 YTD as % of 2024 YTD	98	107	102	109	87	142	104
Last 4 weeks as % of 2024	90	118	106	120	109	197	112
Last 4 weeks as % of 3-yr. avg.	86	119	111	110	105	118	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 May 3, grain carloads were down 2 percent from the previous week, up 12 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: 5/2/2025		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	33.0	42.4	17.5	13.9	7.6	26.9	15.7	22.4
	Average over last 4 weeks	40.9	31.0	17.3	15.2	11.9	25.0	18.1	22.8
	Average of same 4 weeks last year	30.5	31.4	15.6	16.4	4.8	12.3	22.7	19.1
Average grain unit train speeds (miles per hour)	This week	22.1	18.5	24.7	22.9	24.1	18.4	23.1	22.0
	Average over last 4 weeks	22.1	18.3	24.6	22.3	24.1	19.4	23.1	22.0
	Average of same 4 weeks last year	23.2	19.4	25.1	23.2	25.6	22.2	26.7	23.6

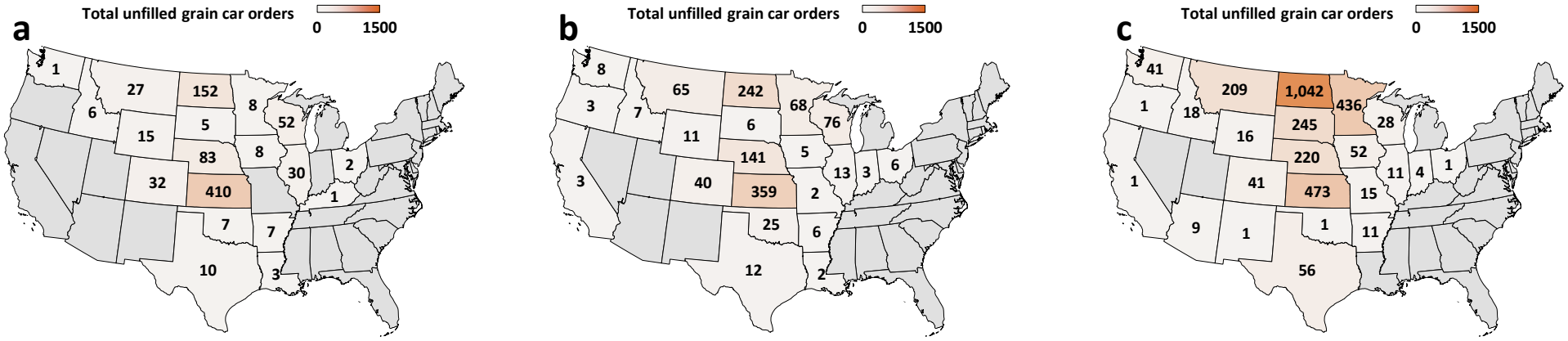
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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: 5/2/2025		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	68	9	227	107	2	54	11	478
	Average over last 4 weeks	67	8	299	94	9	49	8	534
	Average of same 4 weeks last year	13	5	472	98	4	40	25	656
Average number of loaded grain cars not moved in over 48 hours	This week	42	221	309	58	1	105	51	787
	Average over last 4 weeks	84	198	259	74	7	115	29	766
	Average of same 4 weeks last year	15	217	619	78	2	27	21	979
Average number of grain unit trains held	This week	0	0	6	4	1	5	3	19
	Average over last 4 weeks	1	1	8	5	0	3	3	21
	Average of same 4 weeks last year	0	3	16	5	0	3	6	33
Total unfilled manifest grain car orders	This week	2	7	87	592	0	171	0	859
	Average over last 4 weeks	10	3	218	558	0	314	58	1,160
	Average of same 4 weeks last year	1	7	2,491	375	0	56	0	2,930

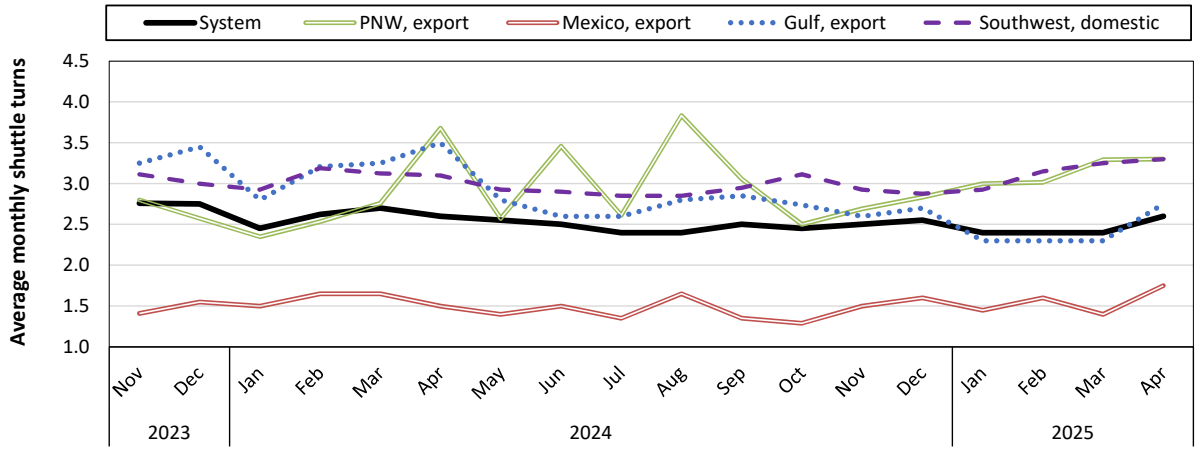
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CP = Canadian Pacific; KCS = Kansas City Southern. Although CP and KCS have merged to form Canadian Pacific Kansas City, the service metrics are reported for two legacy networks that correspond to the old nomenclature (CP and KCS).
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 5/2/2025 (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

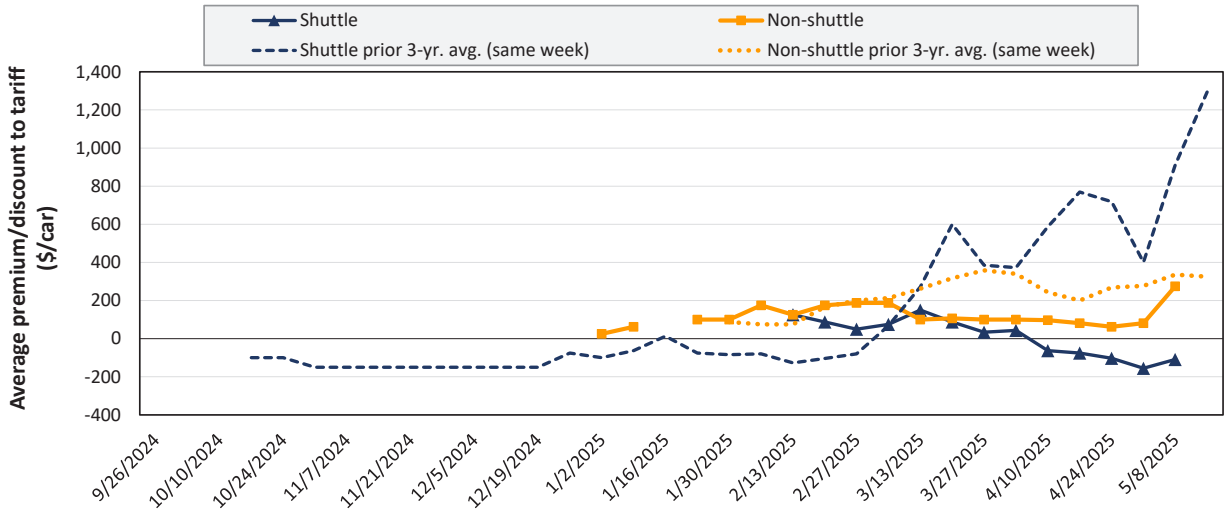


Average monthly systemwide grain shuttle turns for April 2025 were 2.6. By destination region, average monthly grain shuttle turns were 3.3 to PNW, 1.75 to Mexico, 2.75 to the Gulf, and 3.3 to the Southwest.

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



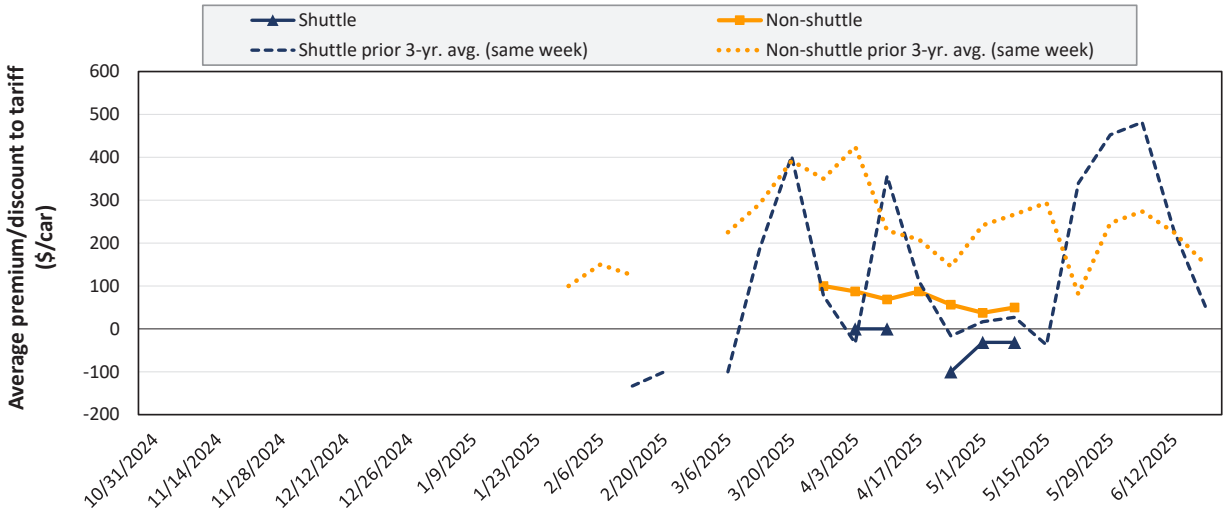
Average non-shuttle bids/offers rose $194 this week, and are at the peak.

Average shuttle bids/offers rose $46 this week and are $259 below the peak.

5/8/2025	BNSF	UP
Non-Shuttle	$275	n/a
Shuttle	-$10	-$208

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



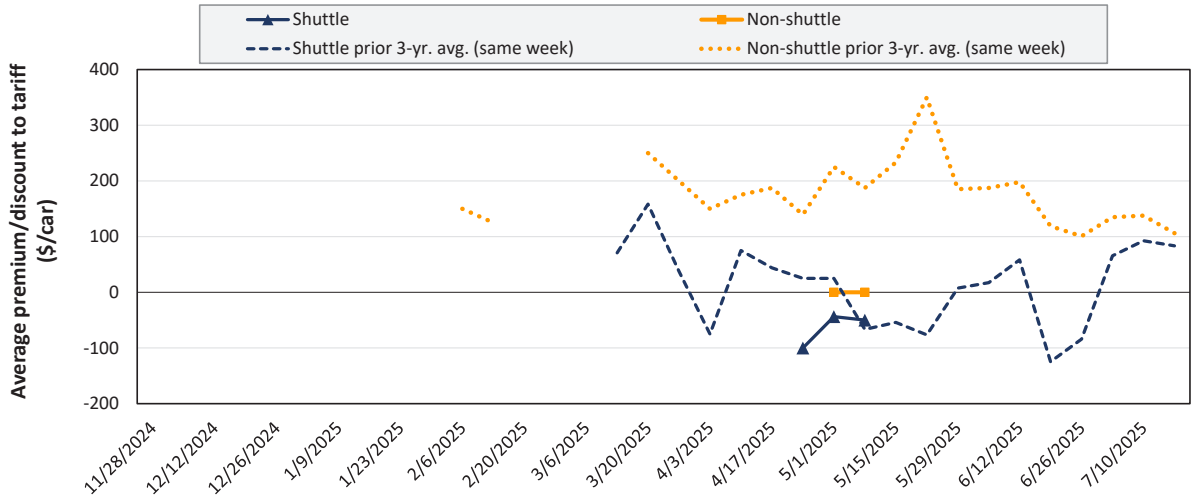
Average non-shuttle bids/offers rose $13 this week, and are $50 below the peak.

Average shuttle bids/offers are unchanged this week and are $31 below the peak.

5/8/2025	BNSF	UP
Non-Shuttle	$150	-$50
Shuttle	$38	-$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.

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



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

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

5/8/2025	BNSF	UP
Non-Shuttle	n/a	$0
Shuttle	$0	-$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: 5/8/2025		Delivery period					
		May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25
Non-shuttle	BNSF	275	150	n/a	n/a	n/a	n/a
	Change from last week	37	75	n/a	n/a	n/a	n/a
	Change from same week 2024	-125	-150	n/a	n/a	n/a	n/a
	UP	n/a	-50	0	n/a	n/a	n/a
	Change from last week	n/a	-50	0	n/a	n/a	n/a
	Change from same week 2024	n/a	-150	-50	n/a	n/a	n/a
Shuttle	BNSF	-10	38	0	50	n/a	625
	Change from last week	28	-1	-13	0	n/a	-25
	Change from same week 2024	-235	-88	25	213	n/a	n/a
	UP	-208	-100	-100	n/a	n/a	n/a
	Change from last week	65	0	0	n/a	n/a	n/a
	Change from same week 2024	-83	38	0	n/a	n/a	n/a
	CPKC	-75	n/a	n/a	n/a	n/a	n/a
	Change from last week	-8	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	75	n/a	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.

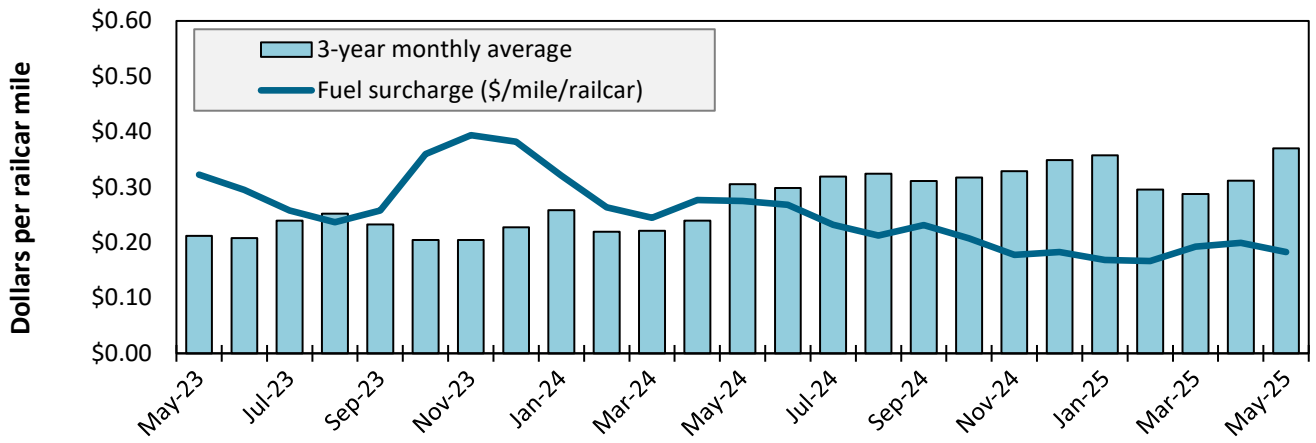
Source: BNSF, CN, CPKC, CSX, and UP.

Table 8. Rail tariff 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).

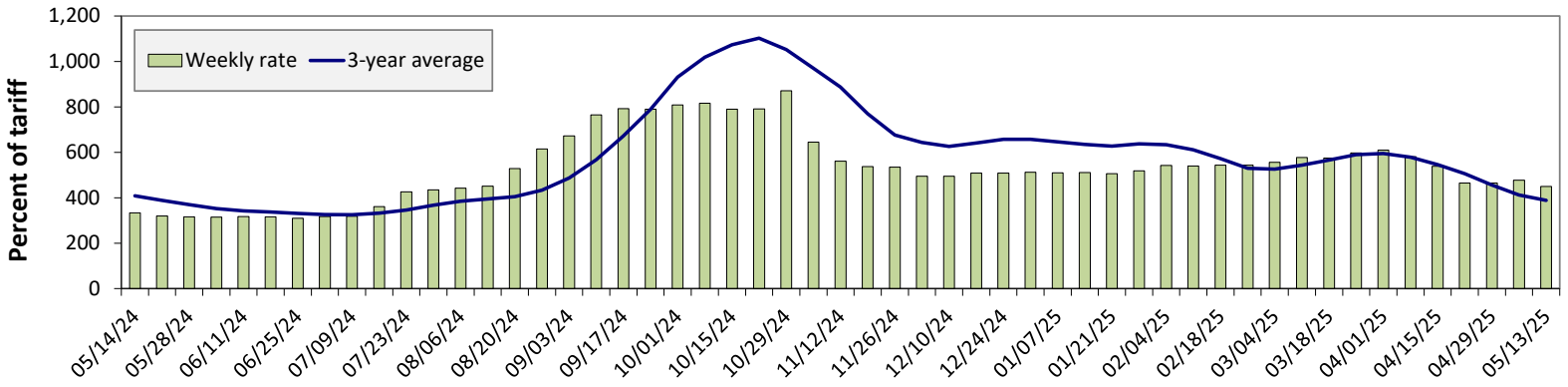
Figure 9. Railroad fuel surcharges, North American weighted average



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 May 13: 6 percent lower than the previous week; 35 percent higher than last year; and 16 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

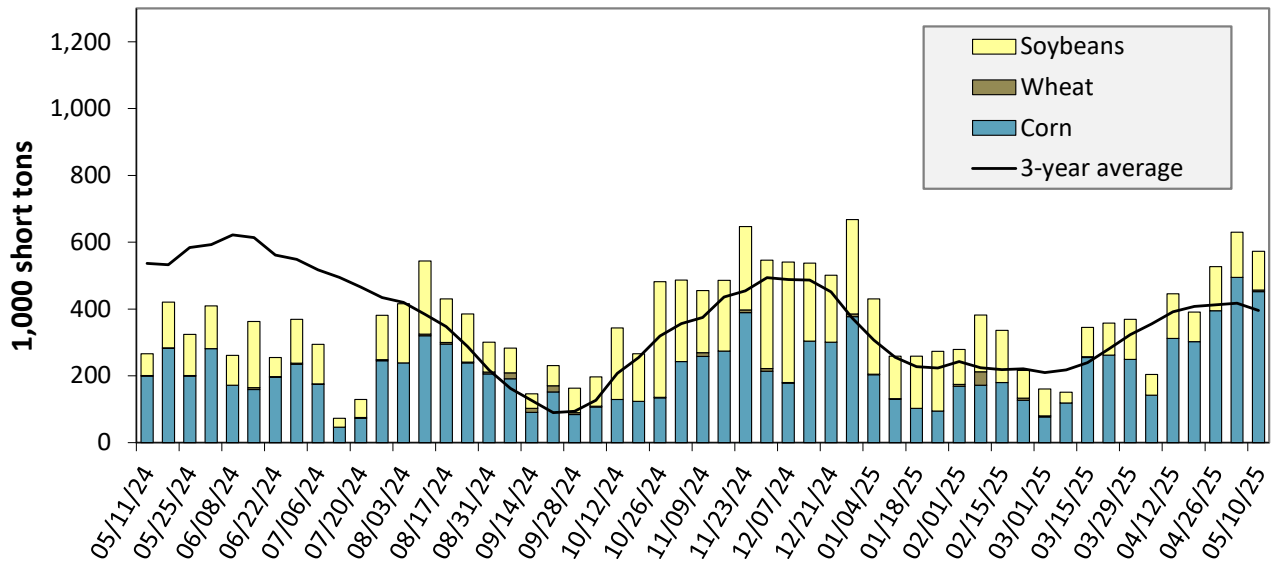
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	5/13/2025	499	474	449	337	323	296
	5/6/2025	526	512	478	367	334	306
$/ton	5/13/2025	30.89	25.22	20.83	13.45	15.15	9.29
	5/6/2025	32.56	27.24	22.18	14.64	15.66	9.61
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	39	38	35	37	23	42
	3-year avg.	4	10	16	15	-8	8
Rate	June	471	442	418	321	319	290
	August	509	469	456	406	398	376

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 May 10: 115 percent higher than last year and 45 percent higher than the 3-year average.

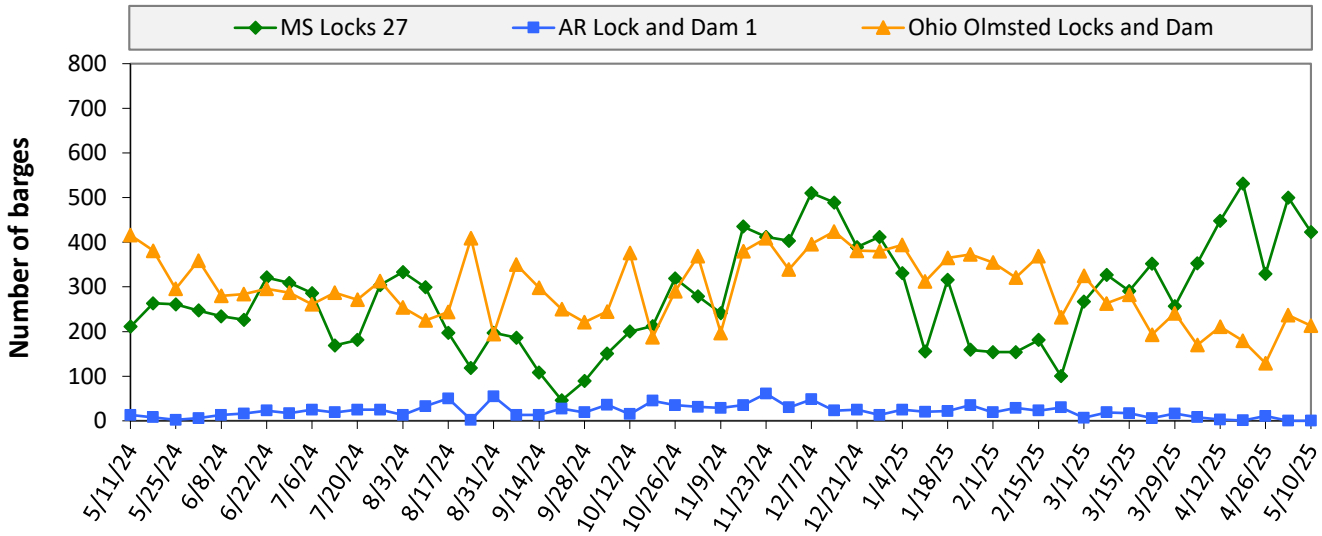
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 05/10/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	146	0	44	0	190
Mississippi River (Winfield, MO (L25))	277	5	75	0	356
Mississippi River (Alton, IL (L26))	481	5	111	0	596
Mississippi River (Granite City, IL (L27))	452	5	116	0	573
Illinois River (La Grange)	212	0	45	0	257
Ohio River (Olmsted)	74	6	61	4	144
Arkansas River (L1)	0	14	8	0	22
Weekly total - 2025	526	24	186	4	739
Weekly total - 2024	384	16	90	0	490
2025 YTD	6,529	364	4,066	85	11,044
2024 YTD	4,799	629	4,346	78	9,852
2025 as % of 2024 YTD	136	58	94	109	112
Last 4 weeks as % of 2024	145	101	162	99	146
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.

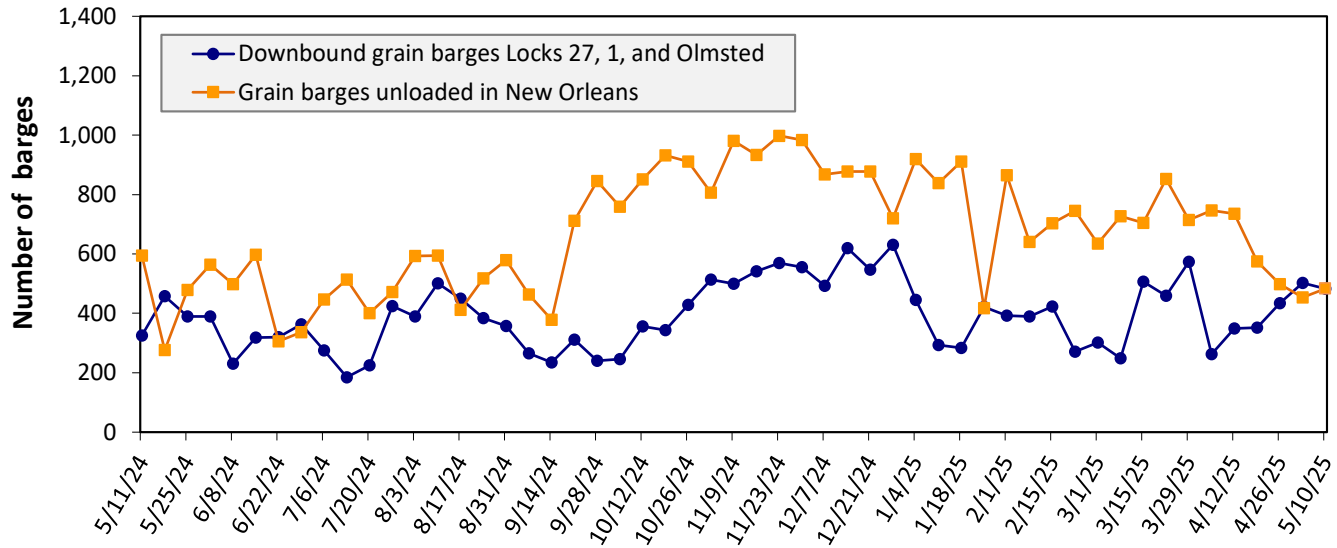
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending May 10: 636 barges transited the locks, 101 barges fewer 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 May 10: 475 barges moved down river, 28 fewer than the previous week; 483 grain barges unloaded in the New Orleans Region, 7 percent more than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		May 2025	April 2025	May 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.55	$21.57	$20.92	3.0	4.2
	Central Ferry, WA/Almota, WA	$20.65	$20.67	$20.05	3.0	4.0
	Lyons Ferry, WA	$19.64	$19.66	$19.08	2.9	3.7
	Windust, WA/Lower Monumental, WA	$18.61	$18.63	$18.09	2.8	3.4
	Sheffler, WA	$18.58	$18.60	$18.06	2.9	3.4
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.38	$17.40	$16.91	2.8	2.9
	Port Kelly, WA/Wallula, WA	$17.16	$17.18	$16.70	2.7	2.8
	Umatilla, OR	$17.06	$17.08	$16.60	2.7	2.8
	Boardman, OR/Hogue Warner, OR	$16.80	$16.82	$16.35	2.7	2.7
	Arlington, OR/Roosevelt, WA	$16.64	$16.66	$16.20	2.7	2.6
	Biggs, OR	$15.31	$15.33	$14.92	2.6	2.0
	The Dalles, OR	$14.21	$14.23	$13.86	2.5	1.4

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)

April 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	389	0	389
Columbia River (Bonneville Lock and Dam (L1))	423	0	423
Monthly total 2025	423	0	423
Monthly total 2024	257	0	257
2025 YTD	1,327	0	1,327
2024 YTD	639	0	639

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.

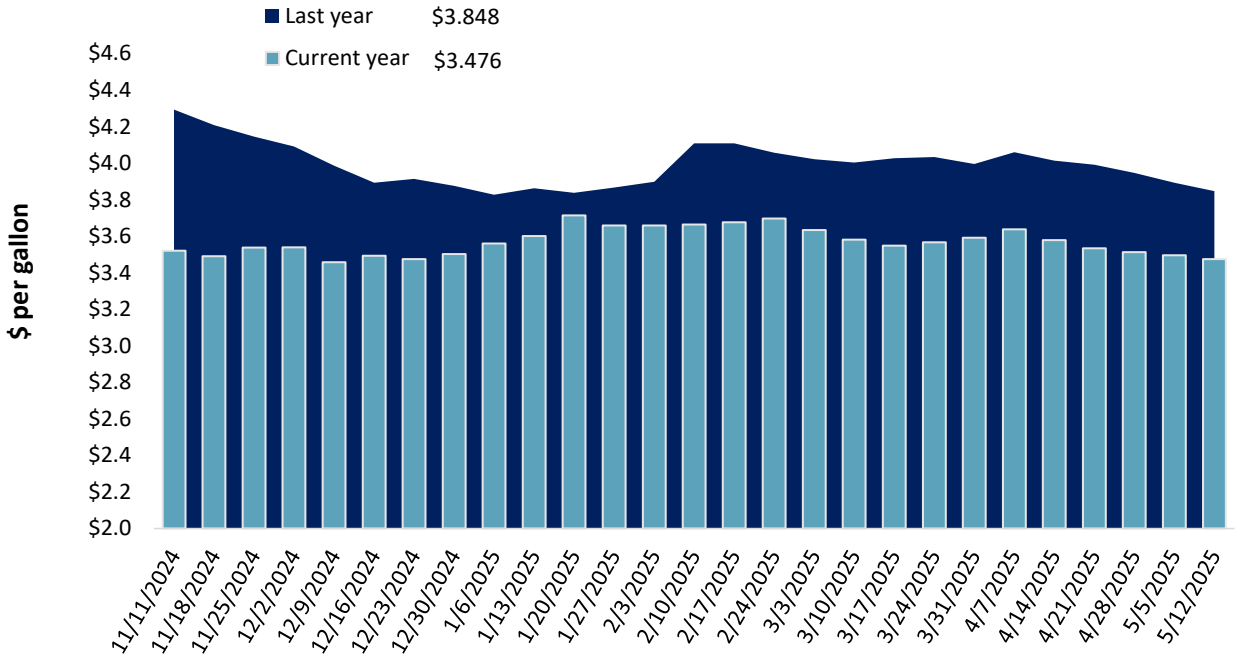
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 5/12/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.534	-0.033	-0.382
	New England	3.877	-0.018	-0.356
	Central Atlantic	3.777	-0.019	-0.378
	Lower Atlantic	3.408	-0.040	-0.386
II	Midwest	3.416	-0.016	-0.352
III	Gulf Coast	3.143	-0.031	-0.416
IV	Rocky Mountain	3.463	0.003	-0.328
V	West Coast	4.211	0.007	-0.340
	West Coast less California	3.735	-0.015	-0.318
	California	4.760	0.032	-0.363
Total	United States	3.476	-0.021	-0.372

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 May 12, the U.S. average diesel fuel price decreased 2.1 cents from the previous week to $3.476 per gallon, 37.2 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 5/1/2025	814	229	656	638	25	2,361	16,808	4,253	23,422
	This week year ago	440	382	525	392	27	1,766	13,180	3,658	18,603
	Last 4 wks. as % of same period 2023/24	269	136	166	224	122	200	132	121	135
Current shipped (cumulative) exports sales	2024/25 YTD	4,683	2,923	6,031	5,096	327	19,059	43,603	43,467	106,129
	2023/24 YTD	3,159	3,912	5,904	3,597	500	17,072	34,444	38,679	90,195
	YTD 2024/25 as % of 2023/24	148	75	102	142	65	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 5/1/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
Mexico	1676	20,369	19,522	4	17,746
Japan	514	10,430	8,539	22	9,366
China	0	33	2,196	-99	8,233
Colombia	0	6,192	4,920	26	4,383
Korea	0	4,561	2,165	111	1,565
Top 5 importers	2,191	41,584	37,341	11	41,293
Total U.S. corn export sales	2,245	60,411	47,624	27	51,170
% of YTD current month's export projection	3%	91%	82%	-	-
Change from prior week	18	1,663	889	-	-
Top 5 importers' share of U.S. corn export sales	98%	69%	78%	-	81%
USDA forecast May 2025	67,949	66,043	58,220	13	-
Corn use for ethanol USDA forecast, May 2025	139,700	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 5/1/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23(1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
China	0	22,480	23,840	-6	28,636
Mexico	60	4,658	4,498	4	4,917
Japan	63	1,774	1,890	-6	2,231
Egypt	0	2,766	934	196	2,228
Indonesia	0	1,561	1,695	-8	1,910
Top 5 importers	123	33,239	32,857	1	39,922
Total U.S. soybean export sales	518	47,720	42,336	13	51,302
% of YTD current month's export projection	1%	95%	92%	-	-
Change from prior week	10	377	429	-	-
Top 5 importers' share of U.S. soybean export sales	24%	70%	78%	-	78%
USDA forecast, May 2025	49,396	50,349	46,130	9	-

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 5/01/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
Mexico	532	3,940	3,237	22	3,298
Philippines	174	2,637	2,854	-8	2,494
Japan	255	2,111	1,958	8	2,125
China	0	139	2,113	-93	1,374
Korea	221	2,392	1,375	74	1,274
Taiwan	50	1,015	1,104	-8	921
Nigeria	69	758	276	175	920
Thailand	0	951	460	107	552
Colombia	115	502	327	54	522
Vietnam	0	587	425	38	313
Top 10 importers	1416	15,032	14,128	6	13,792
Total U.S. wheat export sales	2,552	21,420	18,838	14	18,323
% of YTD current month's export projection	12%	96%	98%	-	-
Change from prior week	493	70	41	-	-
Top 10 importers' share of U.S. wheat export sales	55%	70%	75%	-	75%
USDA forecast, May 2025	21,798	22,317	19,264	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.

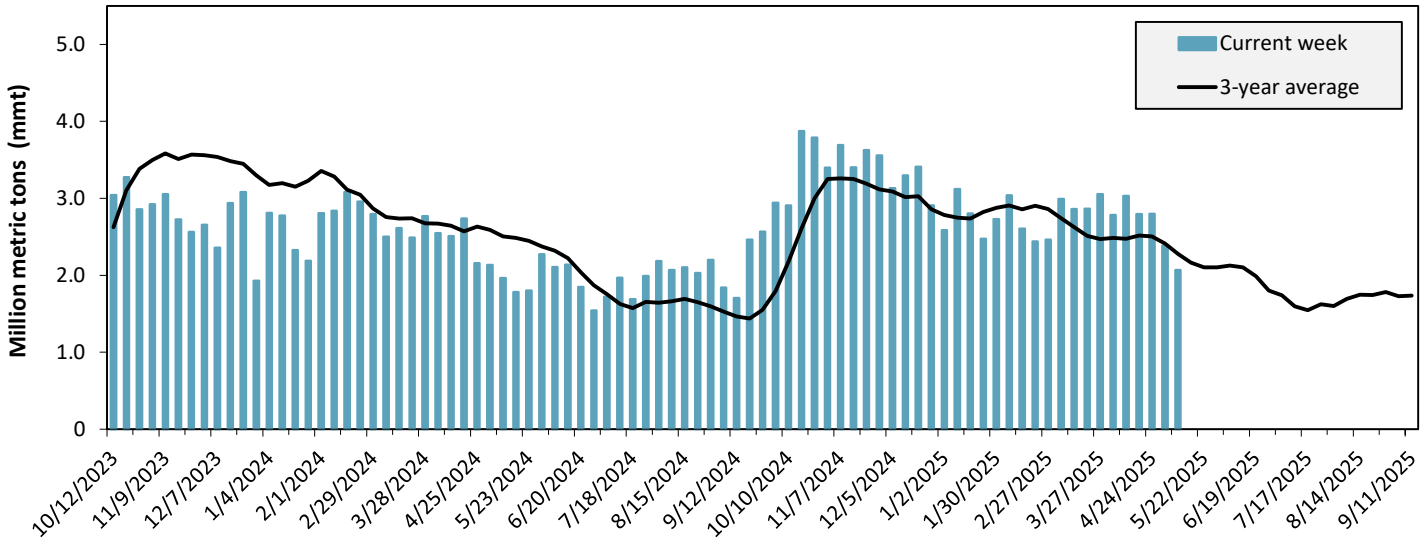
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 05/08/2025	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	519	613	85	9,394	6,961	135	130	158	13,987
	Soybeans	0	68	0	1,966	2,502	79	550	158	10,445
	Wheat	247	244	101	3,958	3,783	105	134	201	11,453
	All grain	766	926	83	15,408	14,073	109	130	153	37,186
Mississippi Gulf	Corn	503	619	81	13,344	9,242	144	119	95	27,407
	Soybeans	293	132	223	9,294	10,149	92	101	82	29,741
	Wheat	23	47	48	1,249	2,269	55	41	60	4,523
	All grain	820	798	103	23,887	21,715	110	103	89	61,789
Texas Gulf	Corn	0	0	n/a	105	195	54	n/a	n/a	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	73	40	184	1,210	566	214	297	120	1,940
	All grain	73	40	184	1,505	2,399	63	61	53	6,965
Interior	Corn	191	377	51	4,625	4,859	95	107	137	13,463
	Soybeans	130	130	100	2,427	2,793	87	119	129	8,059
	Wheat	57	77	74	1,062	1,000	106	108	115	2,952
	All grain	390	606	64	8,275	8,760	94	112	134	24,753
Great Lakes	Corn	0	0	n/a	0	0	n/a	n/a	n/a	271
	Soybeans	0	0	n/a	0	8	0	n/a	n/a	136
	Wheat	5	3	156	82	111	74	78	122	653
	All grain	5	3	156	82	119	69	70	61	1,060
Atlantic	Corn	10	7	145	141	157	90	60	90	410
	Soybeans	3	4	73	436	422	103	218	17	1,272
	Wheat	0	0	n/a	27	10	260	n/a	226	73
	All grain	13	11	119	604	588	103	156	50	1,754
All Regions	Corn	1,224	1,617	76	27,610	21,413	129	119	119	56,109
	Soybeans	426	334	128	14,332	15,928	90	120	95	50,865
	Wheat	405	412	98	7,589	7,739	98	112	136	21,594
	All grain	2,067	2,384	87	49,866	47,708	105	111	110	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.

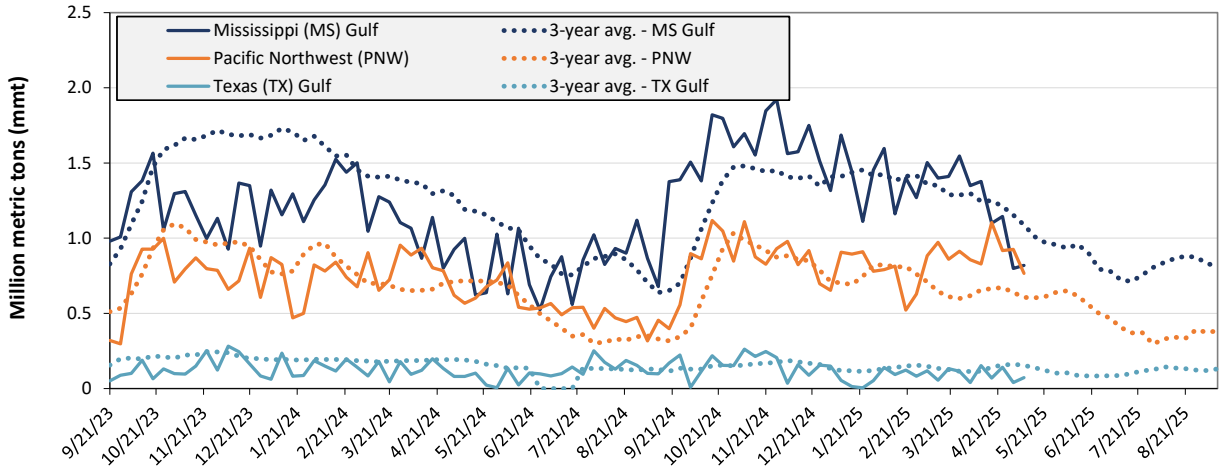
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending May. 08: 2.1 mmt of grain inspected, down 13 percent from the previous week, up 6 percent from the same week last year, and down 9 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 05/08/25 inspections (mmt):
MS Gulf: 0.82
PNW: 0.77
TX Gulf: 0.07

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 3	up 84	up 7	down 17
Last year (same 7 days)	down 12	down 9	down 12	up 28
3-year average (4-week moving average)	down 25	down 52	down 28	up 26

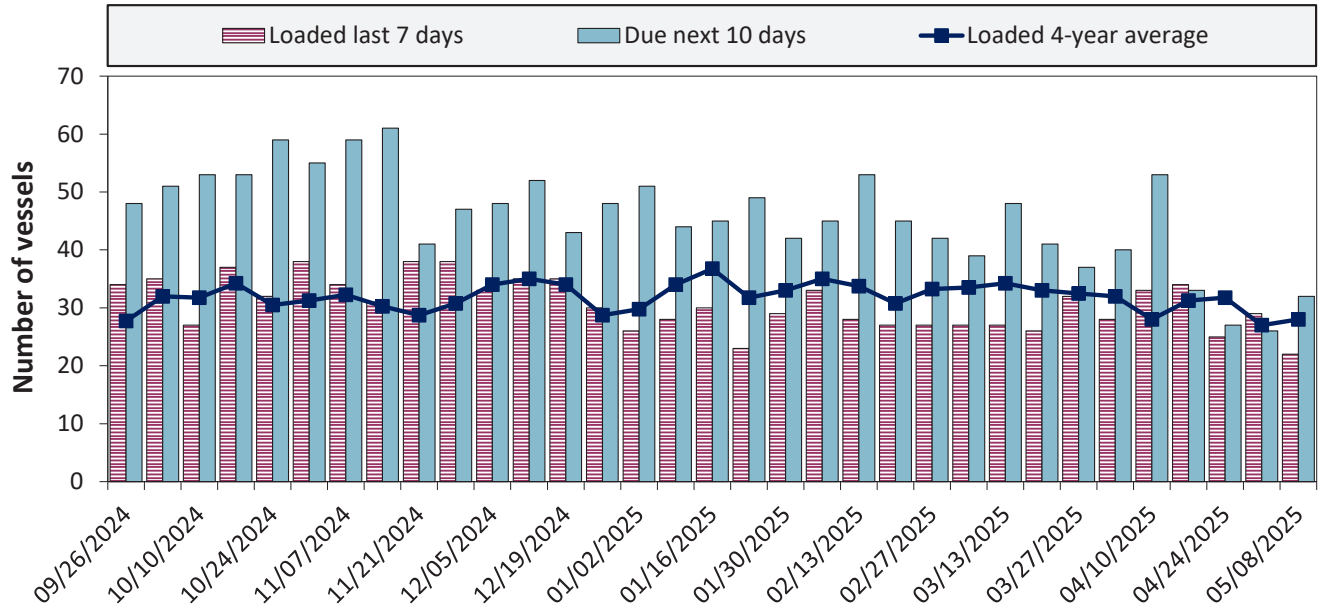
Source: USDA, Federal Grain Inspection Service.

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

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
5/8/2025	19	22	32	13
5/1/2025	19	29	26	16
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.

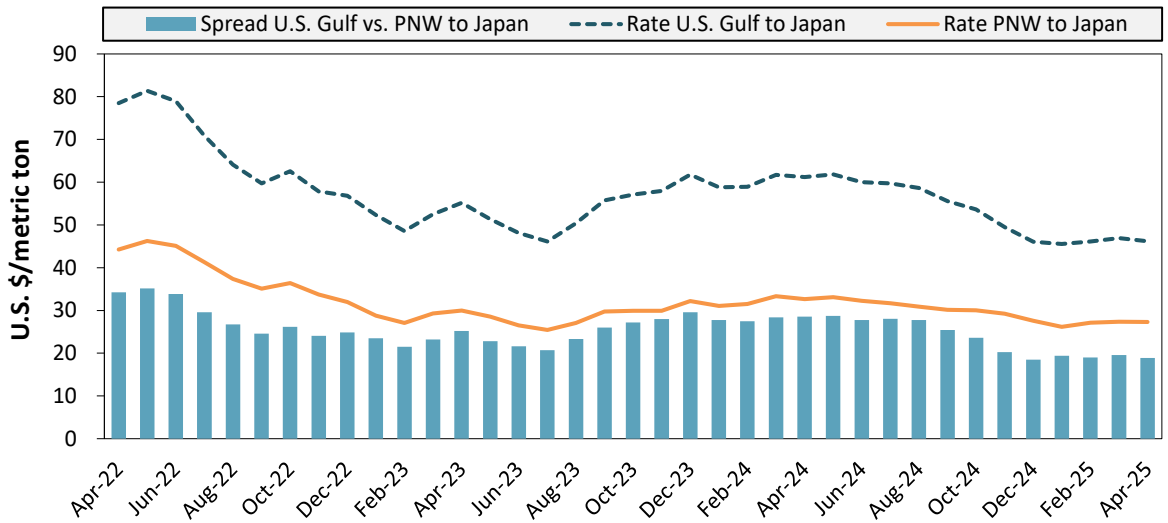
Figure 19. U.S. Gulf vessel loading activity



Week ending 05/08/25, number of vessels	Loaded	Due
Change from last year	-19%	10%
Change from 4-year average	-21%	-26%

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.

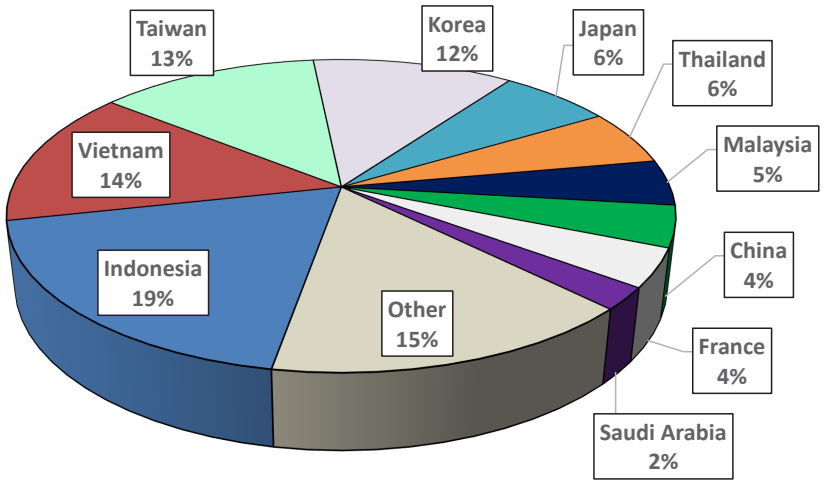
Table 20. Ocean freight rates for selected shipments, week ending 5/10/2025

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	Sep 30, 2024	Oct 1/10, 2024	58,000	62.00
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
NC S. America	China	Heavy grain	May 6, 2025	May 20/31, 2025	66,000	35.50
Brazil	N. China	Grain	May 9, 2025	Jun 1/7, 2025	64,000	36.50
Brazil	China	Heavy grain	May 7, 2025	Jun 20/Jul 20, 2025	63,000	32.75
Brazil	China	Soybeans	Apr 30, 2025	May 24/30, 2025	63,000	37.25
Brazil	China	Heavy grain	Apr 29, 2025	May 10/20, 2025	63,000	36.95
Brazil	China	Heavy grain	May 1, 2025	May 24/31, 2025	68,000	35.25
Brazil	N. China	Heavy grain	Apr 30, 2025	May 20/31, 2025	66,000	35.50

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B), except where otherwise indicated. op = option
Source: Maritime Research, Inc.

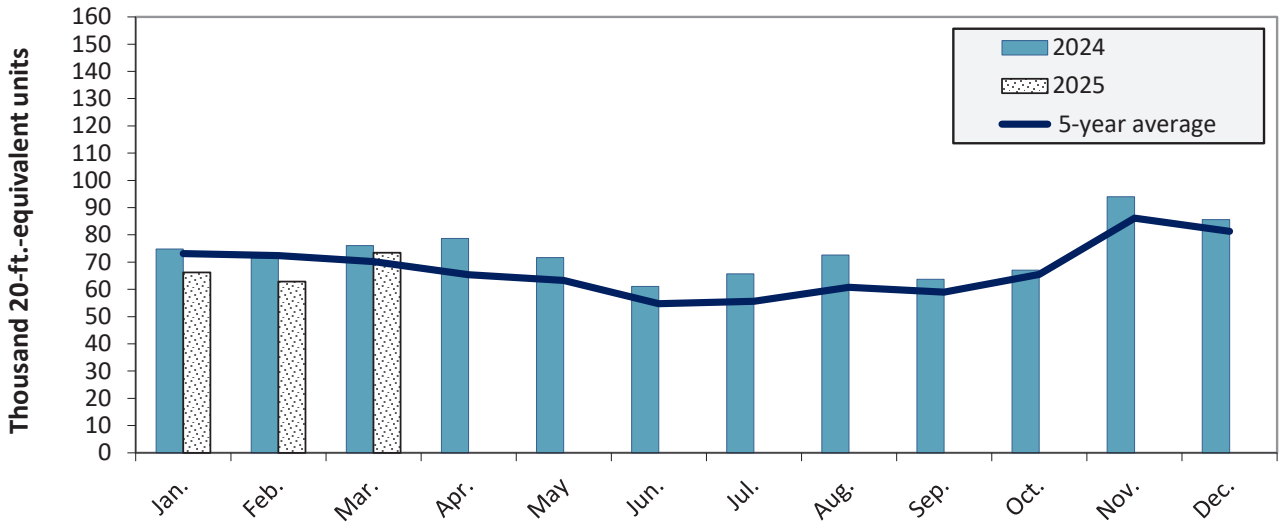
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Mar 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 Mar. 2025 were down 3.4 percent from last year but up 4.7 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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