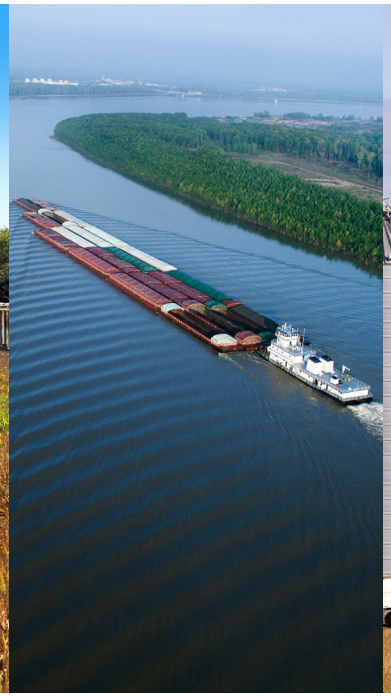
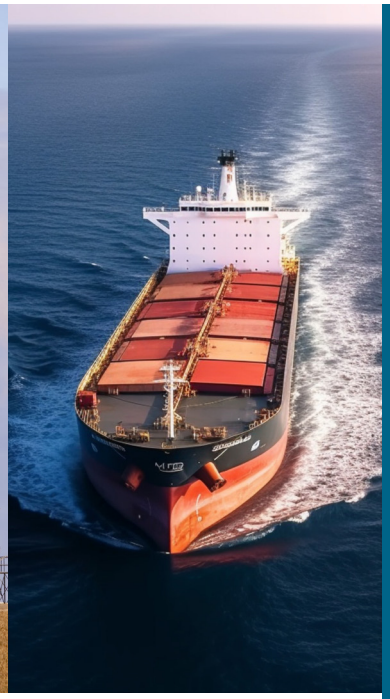
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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BNSF Holds Second Auction for MY 2025/26 Shuttle Trains. On May 21, BNSF Railway (BNSF) held the second of three auctions—for yearlong shuttle train contracts—that the railroad has scheduled ahead of the new marketing year. (Another auction is scheduled for May 28, and additional ones will be held in the fall.)

In marketing year 2025/26, BNSF will offer a total of 140 shuttles—the same number as last year. Although the total number of shuttles matches last year's, BNSF is offering fewer shuttles this year that begin in September or October (47 this year, versus 69 last year). Shuttle contracts that begin in these months typically receive higher bids, relative to the rest of the year, because of higher transportation demand during harvest.

In its May 21 auction, BNSF sold 25 shuttles for $21.8 million. The winning bids ranged from $754,000 to $1.2 million, and they averaged $874,000. Assuming an average of 2.5 turns per month, a $874,000 yearlong shuttle contract represents about $265 per car, per trip. These values are higher than last week's auction, and they are similar to bids from last year (*Grain Transportation Report (GTR), May 15, 2025, first highlight*).

WASDE Estimates for MY 2025/26 Production Rose From February to May. In the May *World Agricultural Supply and Demand Estimates (WASDE) report*, USDA published its newest marketing year (MY) 2025/26 projections, last estimated in February (*GTR, March 6, 2025, first highlight*).

USDA projects U.S. farmers will produce 15.8 billion bushels (bbu) of corn, 4.3 bbu of soybeans, and 1.9 bbu of wheat—up 1 percent (combined) from the February forecast. If realized, the combined volume (22.1 bbu) would be 328 million bushels, 2 percent above the MY 2016/17 record. This forecast signals above-average transportation demand throughout MY 2025/26.

At 21.9 bbu, the projected supplies (beginning stocks and new production) of corn and soybeans for fall 2025 are only 3.6 bbu less than the current (December 2024) storage capacity available for (all) grain. That 3.6-bbu projected surplus in storage is 1.2 bbu less (–25 percent) than the prior 3-year-average storage surplus. If actualized, the tight storage projection could raise demand for transportation during harvest, at least nationally—though timing (and volumes) will vary widely by State (*GTR, October 3, 2024*).

South Dakota Waives HOS Regulations for Fuel. The Governor of South Dakota has waived hours-of-service (HOS) regulations for motor carriers and drivers transporting diesel, propane, ethanol and biodiesel until May 29. This action is intended to mitigate the State's extremely low inventories and outages of fuel stemming from high demand for petroleum products.

Motor carriers cannot require fatigued or ill drivers to operate a motor vehicle. Drivers who inform a carrier that they need rest must be given at least 10 consecutive hours off duty before being required to return to service.

Other requirements, not specifically mentioned in the South Dakota fuel emergency remain in full effect.

Kansas, Nebraska, and Iowa (*GTR, May 15, 2025, fourth highlight*) also issued similar, recent waivers. Among reasons for the waivers, those States cited longer wait times at terminals, as well as the need for fuel haulers to travel far distances to meet increased demand.

CPKC's Integrated Network Now Reflected in GTR Rail Service Data. Since the Canadian Pacific Kansas City (CPKC) rail network formed in April 2023, the Surface Transportation Board (STB) has received separate weekly rail-service-metric reports for CPKC's legacy networks—Canadian Pacific Railway (CP) and Kansas City Southern Railway (KCS). However, beginning with the week ending May 9-10, CPKC now submits to STB a single report reflecting CPKC's entire network.

A number of GTR figures and tables will reflect CPKC's reporting change: based on the service-metric reports required by STB from all Class I rail carriers (including CPKC), the GTR shows weekly grain carloads in GTR table 3 and GTR figure 3, as well as grain-related service metrics in GTR table 4a and 4b and GTR figs. 4-5. The service metrics are also on AgTransport.

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 8, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 23.23 million metric tons (mmt), down 1 percent from last week and up 30 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.68 mmt, up 1 percent from last week. Net **soybean export sales** were 0.28 mmt, down 25 percent from last week. Net **wheat export sales** for MY 2024/25 were 0.06 mmt, down 16 percent from last week.

Rail

U.S. Class I railroads originated 25,398 **grain carloads** during the week ending May 10. This was a 3-percent decrease from the previous week, 27 percent more than last year, and 11 percent more than the 3-year average.

Average May **shuttle secondary railcar bids/offers** (per car) were $135 below tariff for the week ending May 15. This was $26 less than last week and $298 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $200 above tariff. This was $75 less than last week and $200 lower than this week last year.

Barge

For the week ending May 17, **barged grain movements** totaled 885,881 tons. This was 20 percent more than the previous week and 25 percent more than the same period last year.

For the week ending May 17, 591 grain barges **moved down river**—108 more than last week. There were 622 grain barges **unloaded** in the New Orleans region, 29 percent more than last week.

Ocean

For the week ending May 15, 27 **oceangoing grain vessels** were loaded in the Gulf—42 percent more than the same period last year. Within the next 10 days (starting May 16), 26 vessels were expected to be loaded—28 percent fewer than the same period last year.

As of May 15, 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 $27.00 per mt, down 1 percent from the previous week.

Fuel

For the week ending May 19, the U.S. average **diesel price** increased 6.0 cents from the previous week, to $3.536 per gallon—25.3 cents below the same week last year.

Transportation and Landed Costs of Grain to Mexico in First Quarter 2025

Mexico is a major importer of U.S. grain (corn, soybeans, and wheat). Given Mexico's trade status, low transportation and landed costs for U.S.-Mexico routes are vital to the competitiveness of U.S. grain in Mexico and globally. U.S. grain is transported to Mexico either by cross-border land movements or by sea movements to Mexican ports for inland distribution. This article examines the costs of

Table 1. Quarterly costs of transporting U.S. grain to Veracruz, Mexico, and U.S.-Mexico border locations

Cost	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	CORN									
	Illinois origin					Iowa origin				
Truck	16.11	17.87	21.68	34.6	21.3	6.61	5.97	7.24	9.5	21.3
Rail	-	-	-	-	-	60.16	59.89	59.61	-0.9	-0.5
Barge	20.61	32.43	27.77	34.7	-14.4	-	-	-	-	-
Ocean	19.43	14.84	13.64	-29.8	-8.1	-	-	-	-	-
Total transportation cost	56.15	65.14	63.09	12.4	-3.1	66.77	65.86	66.85	0.1	1.5
Farm value	172.30	159.05	174.66	1.4	9.8	179.26	162.72	177.02	-1.2	8.8
Landed cost	228.45	224.19	237.75	4.1	6.0	246.03	228.58	243.87	-0.9	6.7
Transport % of landed cost	25	29	27	1.96	-2.52	27	29	27	0.27	-1.4
Cost	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	SOYBEANS									
	Illinois origin					Missouri origin				
Truck	16.11	17.87	21.68	34.6	21.3	6.61	5.97	7.24	9.5	21.3
Rail	-	-	-	-	-	54.59	53.45	53.16	-2.6	-0.5
Barge	20.61	32.43	27.77	34.7	-14.4	-	-	-	-	-
Ocean	19.43	14.84	13.64	-29.8	-8.1	-	-	-	-	-
Total transportation cost	56.15	65.14	63.09	12.4	-3.1	61.20	59.42	60.40	-1.3	1.6
Farm value	451.95	369.89	376.01	-16.8	1.7	449.50	362.05	374.79	-16.6	3.5
Landed cost	508.10	435.03	439.10	-13.6	0.9	510.70	421.47	435.19	-14.8	3.3
Transport % of landed cost	11	15	14	3.32	-0.61	12	14	14	1.90	-0.2

table 1 continues on page 5

table 1 continues from page 4

Cost	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	WHEAT									
	Kansas origin					Kansas origin				
Truck	6.61	5.97	7.24	9.5	21.3	6.61	5.97	7.24	9.5	21.3
Rail	42.21	44.46	44.35	5.1	-0.2	48.59	45.15	45.02	-7.3	-0.3
Ocean	19.43	14.84	13.64	-29.8	-8.1	-	-	-	-	-
Total transportation cost	68.25	65.27	65.23	-4.4	-0.1	55.20	51.12	52.26	-5.3	2.2
Farm value	212.50	196.33	195.35	-8.1	-0.5	212.50	196.33	195.35	-8.1	-0.5
Landed cost	280.75	261.60	260.58	-7.2	-0.4	267.70	247.45	247.61	-7.5	0.1
Transport % of landed cost	24	25	25	1	0	21	21	21	0	0.4

Note: In 2022, because of tax changes in Mexico, all three Class I railroads that ship from the United States to Mexico (BNSF, Union Pacific, and Kansas City Southern) report rates only to the border for interchange: these are called "Rule 11" rates. The estimated total includes the estimated tariff through-rate for shuttle train service to U.S.-Mexico border locations and the reported fuel surcharge. The estimated rate does not include any additional costs for shuttle car service. Rates may be revised from those previously published. Source for ocean freight rates: O'Neil Commodity Consulting. Source for farm values: USDA, National Agricultural Statistics Service. Landed cost is total transportation cost plus farm value. "-" indicates data not required or applicable. Totals may not add exactly because of rounding.
Source: Compiled by USDA, Agricultural Marketing Service.

transporting U.S. grain to Mexico over land (land routes) to various border locations and by sea (water routes) to Veracruz, tracking changes over time (table 1).

Quarter-to-quarter transportation costs. From fourth quarter 2024 to first quarter 2025 (quarter to quarter)—for grain shipped by water routes—total transportation costs fell for U.S. corn and soybeans and remained stable for wheat.[1] For waterborne corn and soybeans, declining transportation costs reflected falling rates for barge and ocean.

A significant drop in soybean exports—through the Mississippi River System and out of the U.S. Gulf—contributed to declines in both barge and ocean freight rates. According to USDA's Foreign Agricultural Service's Global Agricultural Trade System (GATS) data, 15.1 million metric tons (mmt) of soybeans were exported through the U.S. Gulf in fourth quarter 2024, versus only 7.8 million in first quarter 2025—a 48-percent decline. Lower ocean freight rates also reflected an ample supply of vessels and a seasonal lull in demand caused by holidays around the world, including the Chinese Lunar Year celebrations.

By land, total transportation costs rose for all three grain commodities, driven by higher truck rates. Truck rates rose, partly because of a limited truck supply, strong demand for trucking, and rising diesel prices.

Year-to-year transportation costs. From first quarter 2024 to first quarter 2025 (year to year), water-route transportation costs to Mexico rose for corn and soybeans, because of rising truck and barge rates. Barge rates were up from the same time last year, because of delays related to winter storms, high water, and lock repairs in the Mississippi River System—as well as higher export sales, especially for corn (Grain Transportation Report, April 24, 2025). For wheat, water-route transport costs fell, because of lower ocean freight rates.

Land-route costs fell for soybeans and wheat, because of lower rail tariff rates, and remained stable for corn.

1 Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

Quarter-to-quarter landed costs. Quarter to quarter, by both water and land routes, landed costs rose for corn and soybeans and were mostly unchanged for wheat. For waterborne corn and soybeans, higher landed costs reflected rising farm values that outweighed falling transportation costs. For land-route corn and soybeans, higher landed costs reflected increases in both farm values and transportation costs (table 1 and figs. 1 and 2).

For all routes, the share of landed costs comprising transportation ranged from 14 percent to 27 percent.

Year-to-year landed costs. Year to year, landed costs fell for all grains shipped by both the water and land routes—with the exception of corn shipped by water. For water-route corn, rising transportations costs and farm values pushed up landed costs. For all other commodity/route combinations, landed costs fell because of lower transportation costs and/or lower farm values.

U.S. Exports to Mexico. According to GATS data, in first quarter 2025, the U.S. exports destined to Mexico and their quarter-to-quarter changes were as follows: 5.64 million metric tons (mmt) of corn (down 10 percent); 1.16 mmt of soybeans (down 31 percent); and 0.103 mmt of wheat (up 14 percent). Year to year, U.S. exports to Mexico were down 8 percent for corn, down 16 percent for soybeans, and up 7 percent for wheat.

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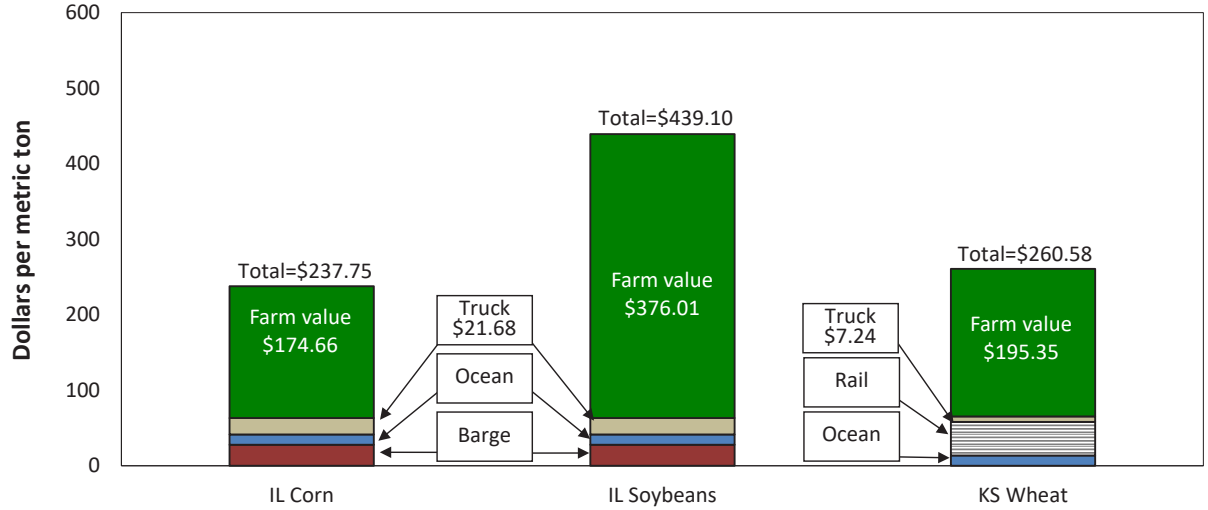
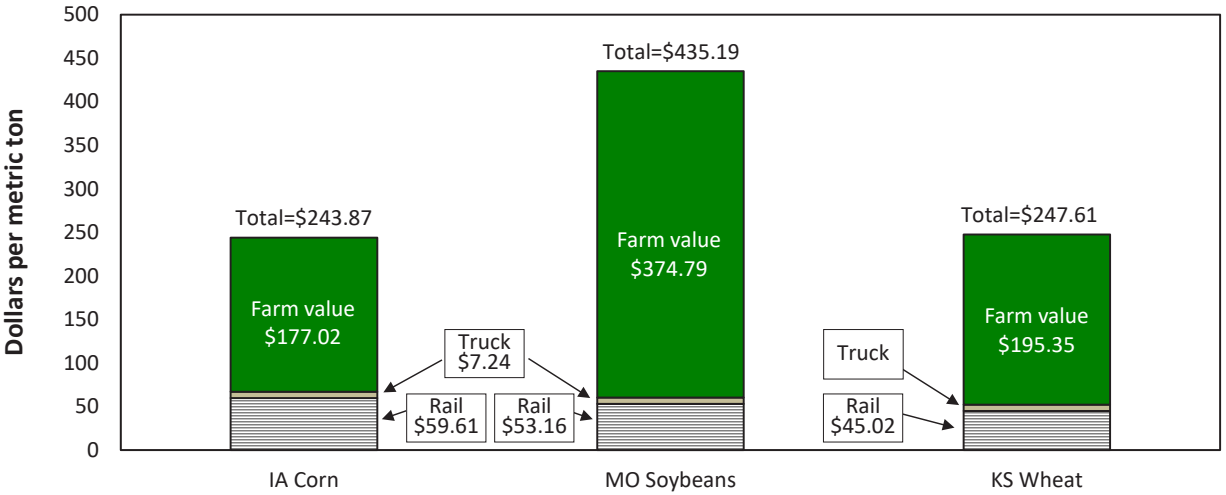
Figure 1. First-quarter 2025 water-route landed costs to Veracruz, Mexico



Note: IL = Illinois; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

Figure 2. First-quarter 2025 land-route landed costs to U.S.-Mexico border locations



Note: IA = Iowa; MO = Missouri; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

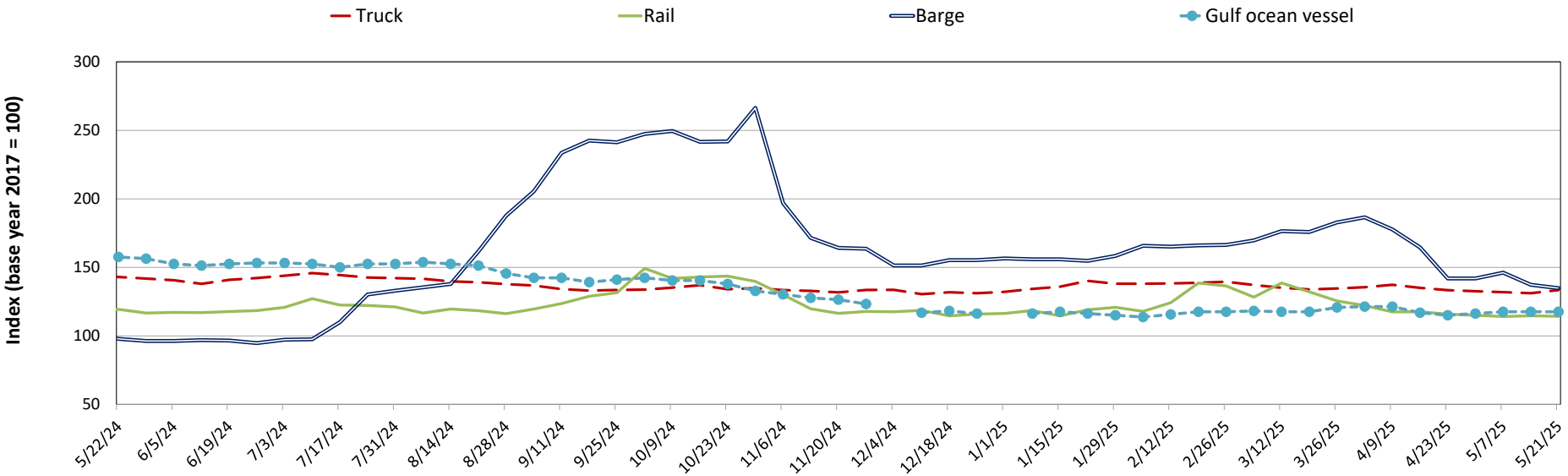
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
05/21/25	133	114	135	118	128
05/14/25	131	115	137	118	129
05/22/24	143	119	98	158	157

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.

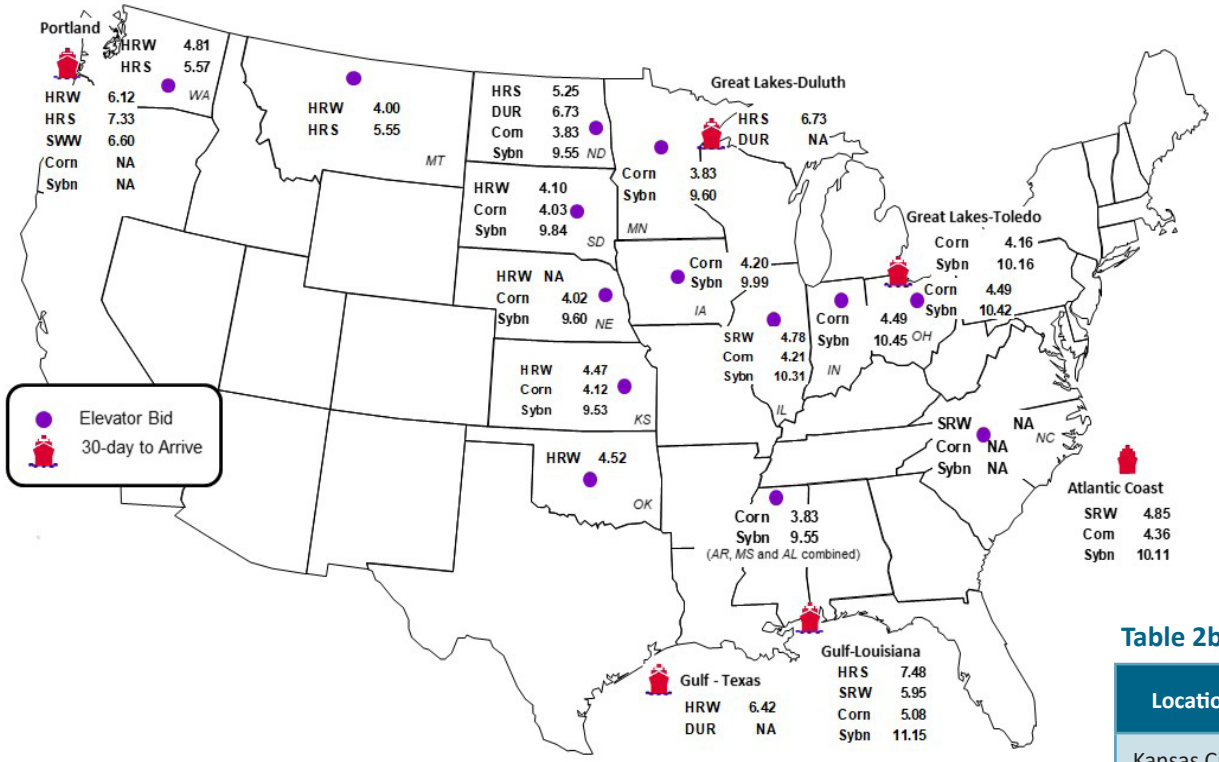
Figure 1. Grain transportation cost indicators as of week ending 5/21/25



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	5/16/2025	5/9/2025
Corn	IL–Gulf	-0.87	-0.94
Corn	NE–Gulf	-1.06	-1.15
Soybean	IA–Gulf	-1.16	-1.14
HRW	KS–Gulf	-1.95	-1.90
HRS	ND–Portland	-2.08	-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	5/16/2025	Week ago 5/9/2025	Year ago 5/17/2024
Kansas City	Wheat	July	5.164	5.176	6.860
Minneapolis	Wheat	July	5.732	5.934	7.114
Chicago	Wheat	July	5.240	5.216	6.770
Chicago	Corn	July	4.434	4.498	4.580
Chicago	Soybean	July	10.498	10.518	12.404

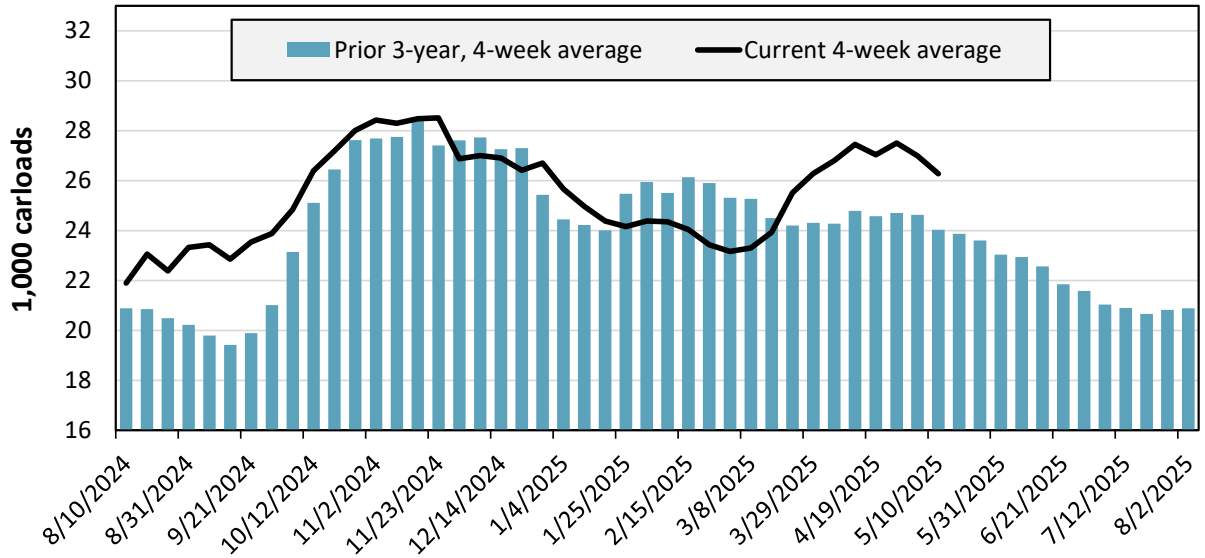
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 5/10/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,519	3,072	10,753	5,317	3,545	1,192	25,398
This week last year	1,151	2,507	8,856	4,712	2,081	662	19,969
2025 YTD	31,517	54,696	209,939	109,455	48,997	26,666	481,270
2024 YTD	31,620	50,645	204,270	100,448	54,484	18,645	460,112
2025 YTD as % of 2024 YTD	100	108	103	109	90	143	105
Last 4 weeks as % of 2024	92	113	107	118	119	202	113
Last 4 weeks as % of 3-yr. avg.	89	113	109	110	111	123	109
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 10, grain carloads were down 3 percent from the previous week, up 13 percent from last year, and up 9 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: 5/9/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	38.5	27.6	22.7	17.5	6.9	36.3	24.9
	Average over last 4 weeks	33.5	31.2	17.9	15.7	12.7	n/a	22.2
	Average of same 4 weeks last year	26.3	32.3	14.6	16.6	4.9	n/a	18.9
Average grain unit train speeds (miles per hour)	This week	20.2	19.8	25.8	22.6	24.6	15.9	21.5
	Average over last 4 weeks	22.1	18.7	25.0	22.4	24.5	n/a	22.5
	Average of same 4 weeks last year	22.9	19.1	24.9	23.2	25.7	n/a	23.2

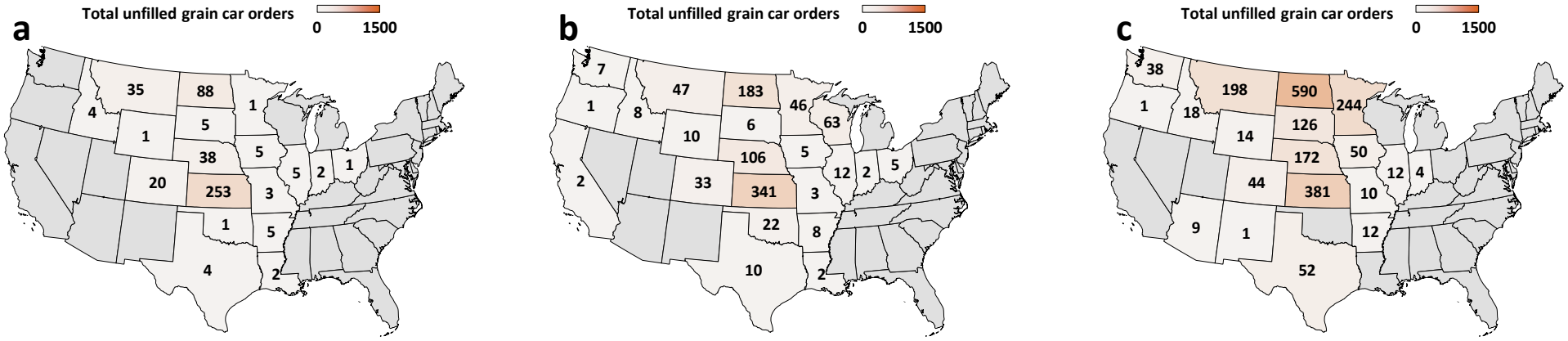
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

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

For the week ending: 5/9/2025		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	37	11	273	95	7	94	517
	Average over last 4 weeks	50	10	282	97	7	n/a	446
	Average of same 4 weeks last year	14	8	482	95	5	n/a	603
Average number of loaded grain cars not moved in over 48 hours	This week	31	188	219	56	1	353	848
	Average over last 4 weeks	73	184	235	73	3	n/a	569
	Average of same 4 weeks last year	15	204	688	94	2	n/a	1,004
Average number of grain unit trains held	This week	0	0	4	5	0	6	15
	Average over last 4 weeks	1	0	6	5	0	n/a	13
	Average of same 4 weeks last year	0	2	17	5	0	n/a	24
Total unfilled manifest grain car orders	This week	3	0	159	311	0	135	608
	Average over last 4 weeks	7	3	171	517	0	n/a	697
	Average of same 4 weeks last year	0	7	1,559	392	0	n/a	1,958

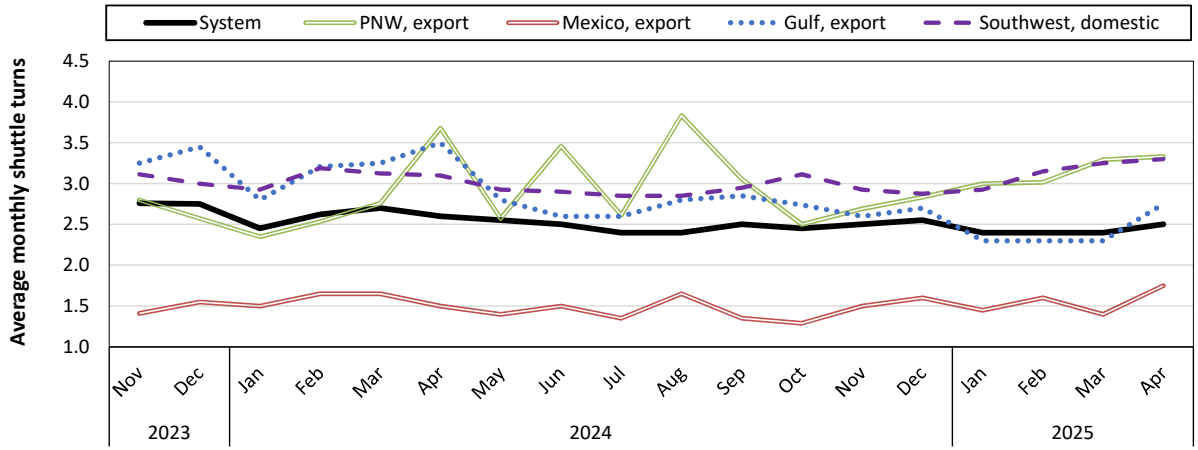
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 5/9/2025 (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 (now part of Canadian Pacific Kansas City) 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

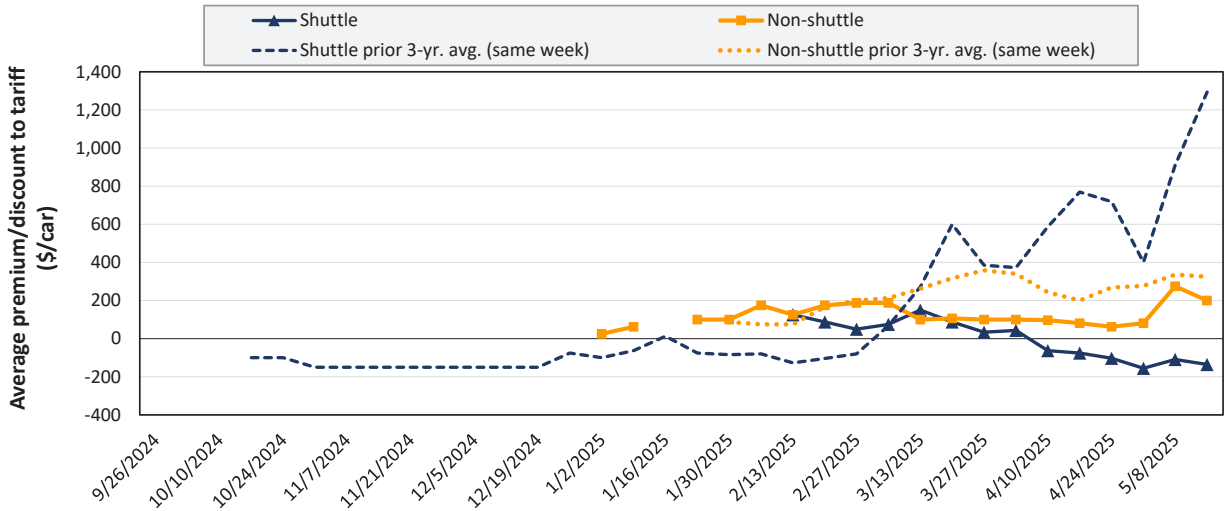


Average monthly systemwide grain shuttle turns for April 2025 were 2.5. By destination region, average monthly grain shuttle turns were 3.33 to PNW, 1.75 to Mexico, 2.75 to the Gulf, and 3.3 to the Southwest.

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



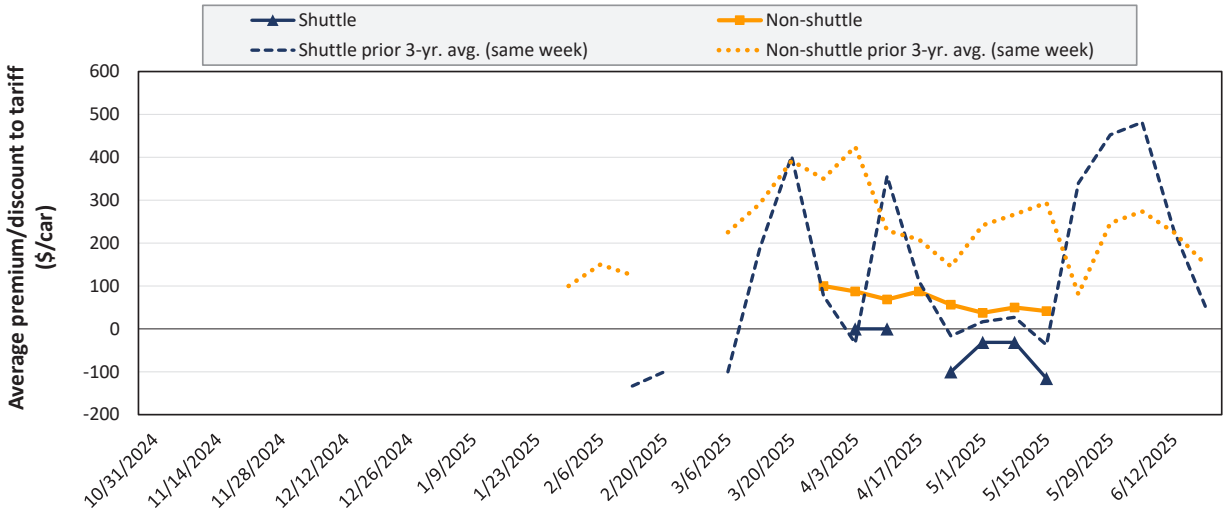
Average non-shuttle bids/offers fell $75 this week, and are $75 below the peak.

Average shuttle bids/offers fell $26 this week and are $285 below the peak.

5/15/2025	BNSF	UP
Non-Shuttle	$200	n/a
Shuttle	-$50	-$221

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



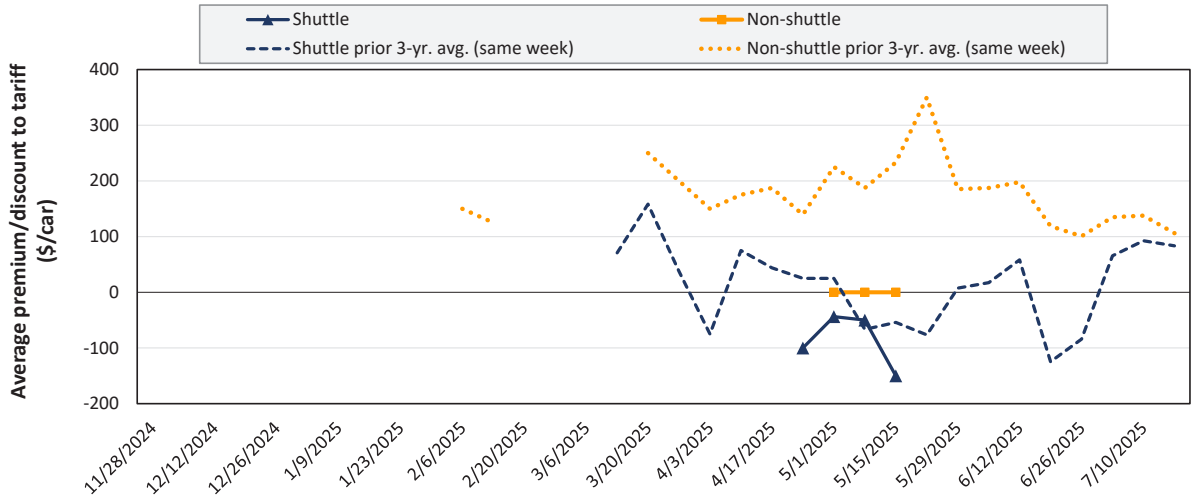
Average non-shuttle bids/offers fell $8 this week, and are $58 below the peak.

Average shuttle bids/offers fell $84 this week and are $116 below the peak.

5/15/2025	BNSF	UP
Non-Shuttle	$133	-$50
Shuttle	-$6	-$225

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

Figure 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 $100 this week and are $106 below the peak.

5/15/2025	BNSF	UP
Non-Shuttle	n/a	$0
Shuttle	-$75	-$225

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

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

For the week ending: 5/15/2025		Delivery period					
		May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25
Non-shuttle	BNSF	200	133	n/a	n/a	n/a	n/a
	Change from last week	-75	-17	n/a	n/a	n/a	n/a
	Change from same week 2024	-200	-167	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	0	0	n/a	n/a	n/a
	Change from same week 2024	n/a	-100	-50	n/a	n/a	n/a
Shuttle	BNSF	-50	-6	-75	-150	n/a	650
	Change from last week	-40	-44	-75	-200	n/a	25
	Change from same week 2024	-425	-219	-100	-50	n/a	n/a
	UP	-221	-225	-225	n/a	n/a	n/a
	Change from last week	-13	-125	-125	n/a	n/a	n/a
	Change from same week 2024	-171	-100	-175	n/a	n/a	n/a
	CPKC	-100	n/a	n/a	n/a	n/a	n/a
	Change from last week	-25	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	-50	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.

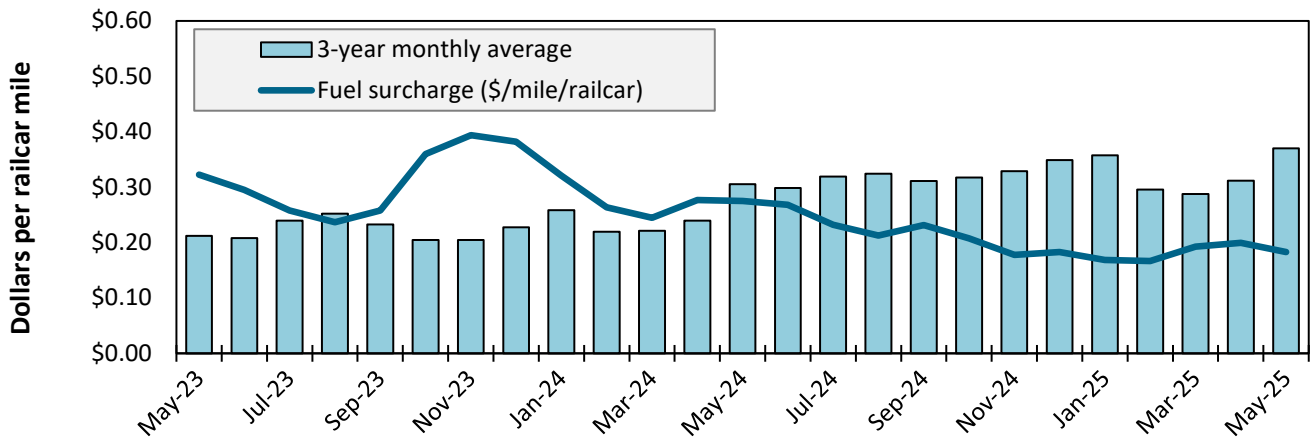
Source: BNSF, CN, CPKC, CSX, and UP.

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).

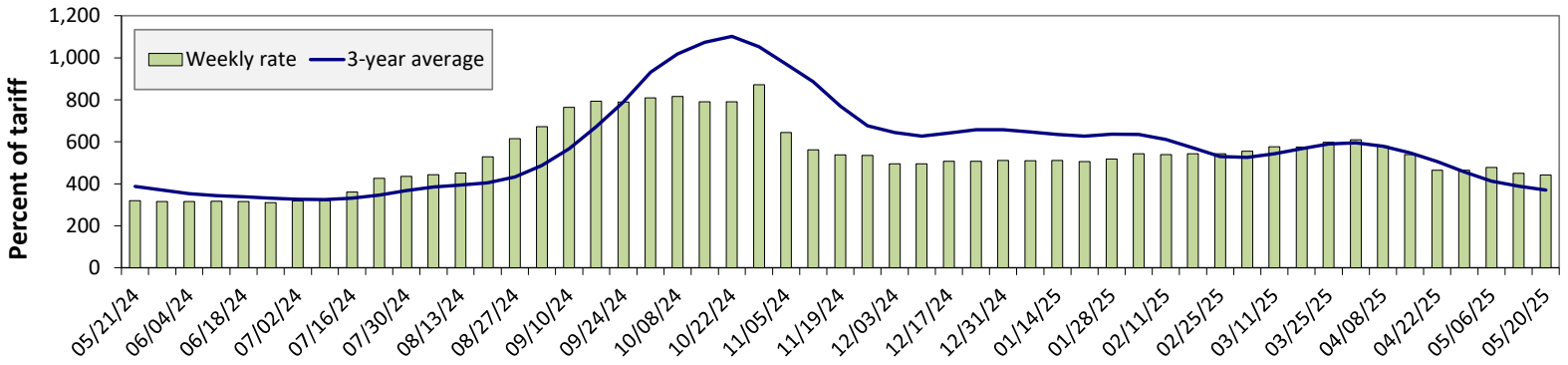
Figure 9. Railroad fuel surcharges, North American weighted average



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 20: 2 percent lower than the previous week; 38 percent higher than last year; and 19 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

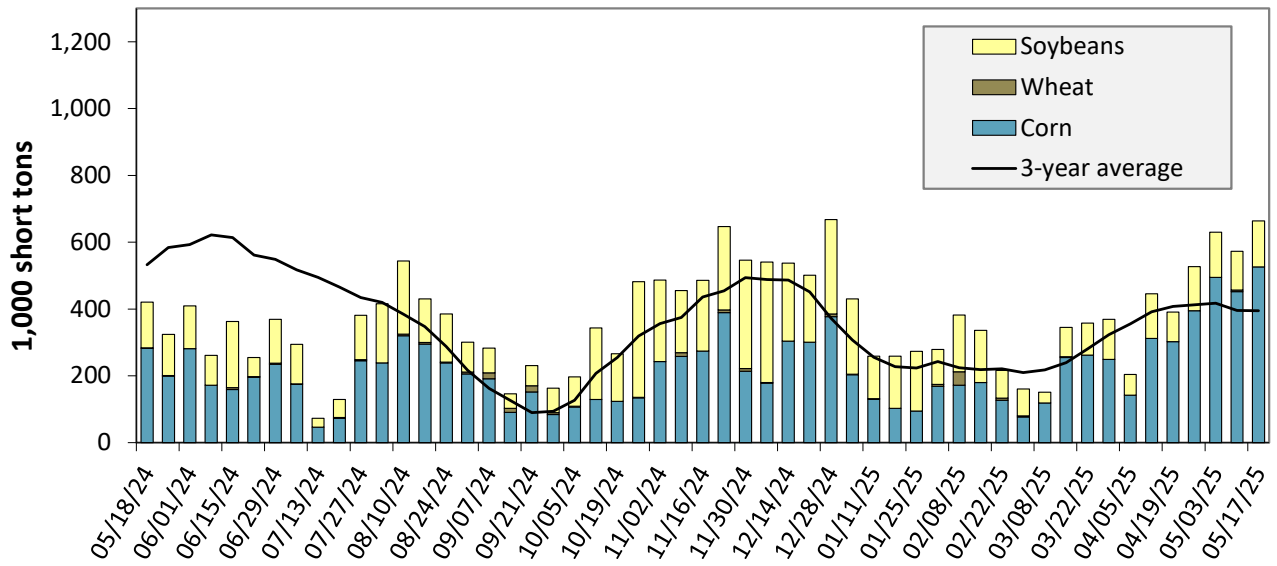
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	5/20/2025	482	457	441	314	331	294
	5/13/2025	499	474	449	337	323	296
$/ton	5/20/2025	29.84	24.31	20.46	12.53	15.52	9.23
	5/13/2025	30.89	25.22	20.83	13.45	15.15	9.29
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	32	35	38	36	27	43
	3-year avg.	3	10	19	15	0	14
Rate	June	468	438	424	308	323	287
	August	509	477	466	403	412	397

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 17: 58 percent higher than last year and 68 percent higher than the 3-year average.

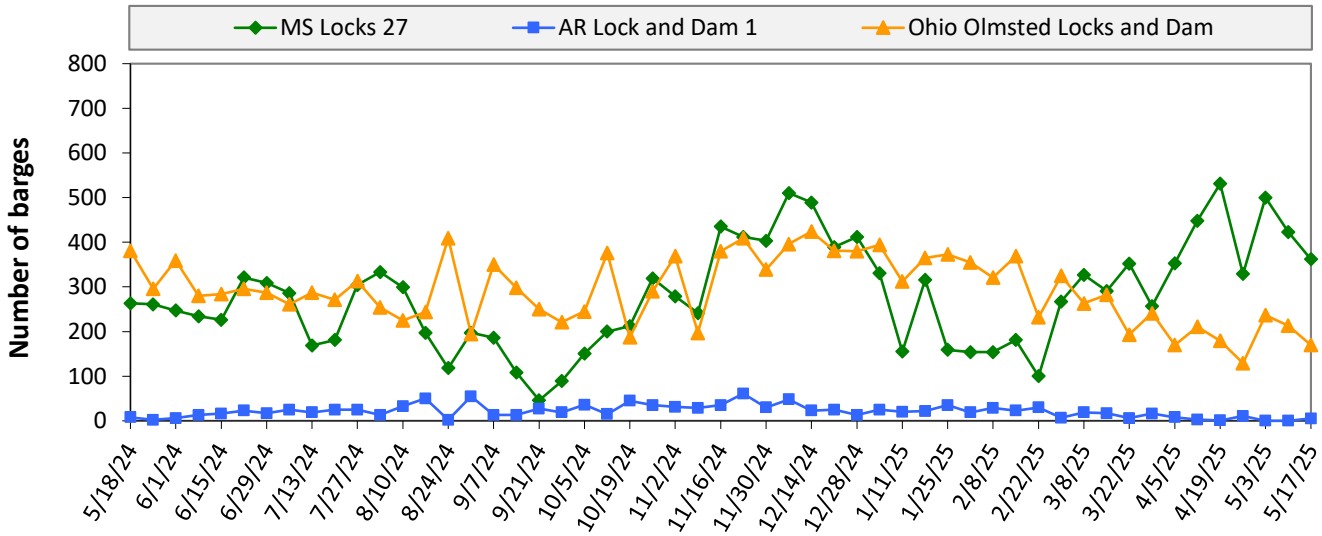
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 05/17/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	140	0	60	0	200
Mississippi River (Winfield, MO (L25))	322	0	70	0	392
Mississippi River (Alton, IL (L26))	406	0	111	0	517
Mississippi River (Granite City, IL (L27))	526	0	138	0	664
Illinois River (La Grange)	145	0	44	0	189
Ohio River (Olmsted)	153	4	33	9	198
Arkansas River (L1)	0	22	1	0	24
Weekly total - 2025	678	26	172	9	886
Weekly total - 2024	484	7	209	10	710
2025 YTD	7,207	390	4,238	100	11,936
2024 YTD	5,282	636	4,555	89	10,562
2025 as % of 2024 YTD	136	61	93	113	113
Last 4 weeks as % of 2024	146	129	164	143	149
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.

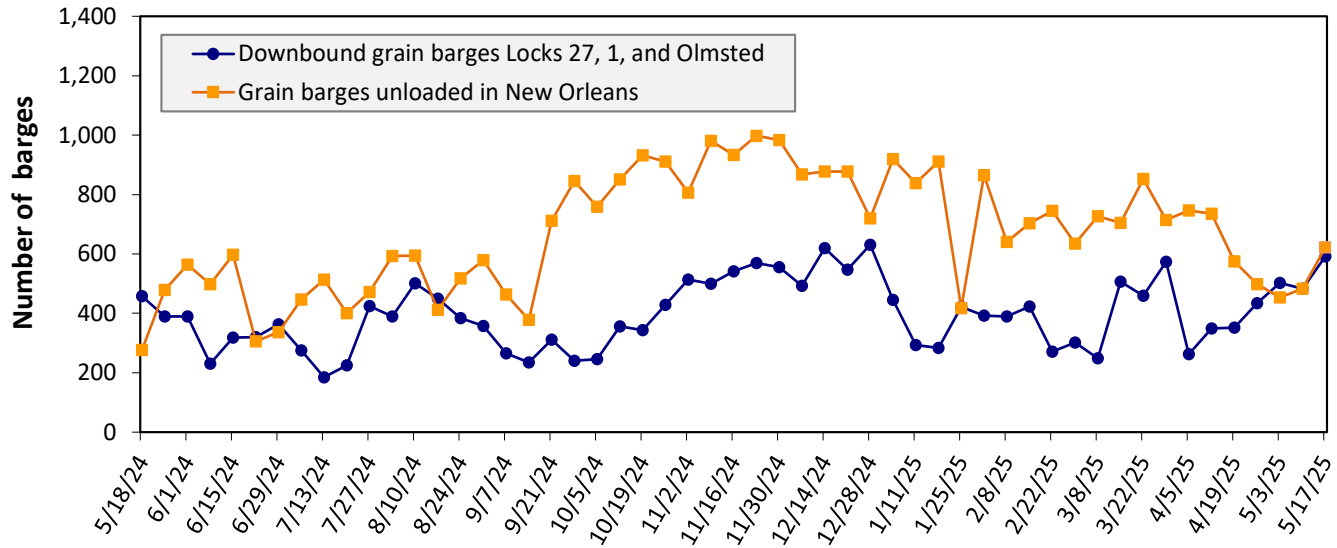
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending May 17: 537 barges transited the locks, 99 barges fewer than the previous week, and 21 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 17: 591 barges moved down river, 108 more than the previous week; 622 grain barges unloaded in the New Orleans Region, 29 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.

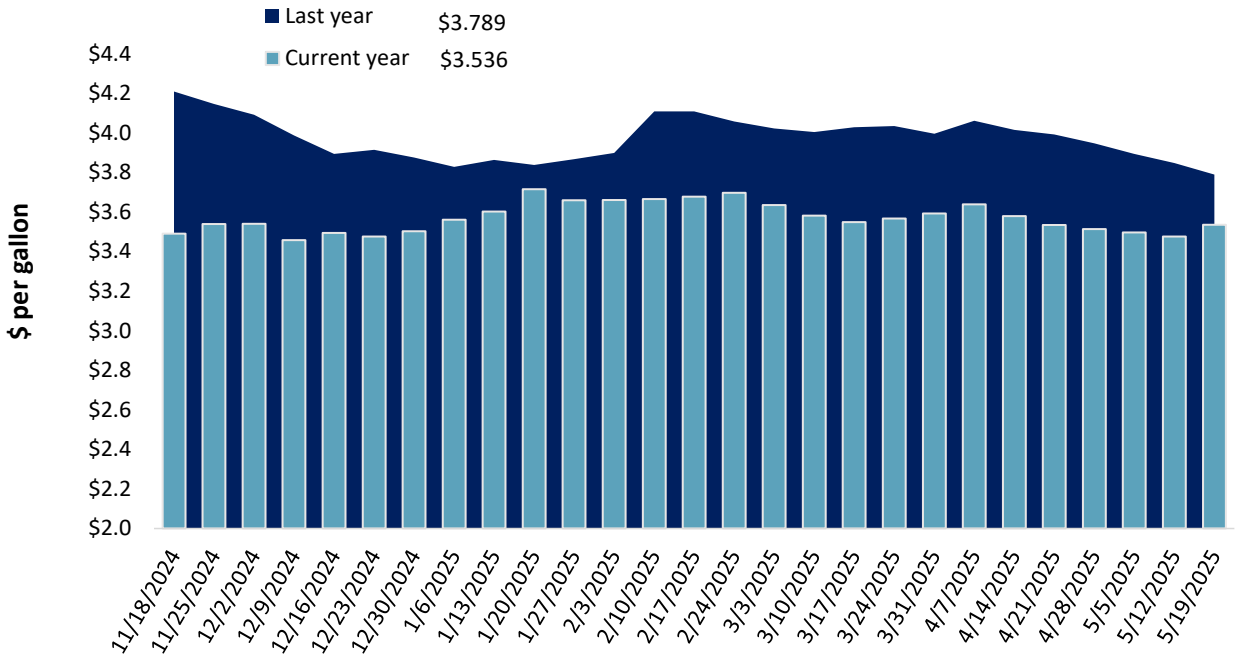
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 5/19/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.580	0.046	-0.315
	New England	3.897	0.020	-0.277
	Central Atlantic	3.788	0.011	-0.326
	Lower Atlantic	3.469	0.061	-0.316
II	Midwest	3.481	0.065	-0.204
III	Gulf Coast	3.201	0.058	-0.289
IV	Rocky Mountain	3.512	0.049	-0.234
V	West Coast	4.296	0.085	-0.199
	West Coast less California	3.828	0.093	-0.184
	California	4.835	0.075	-0.214
Total	United States	3.536	0.060	-0.253

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 19, the U.S. average diesel fuel price increased 6.0 cents from the previous week to $3.536 per gallon, 25.3 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 5/8/2025	800	212	518	494	25	2,048	17,074	4,106	23,227
	This week year ago	346	220	472	330	27	1,395	12,970	3,480	17,845
	Last 4 wks. as % of same period 2023/24	338	112	147	231	96	197	136	119	137
Current shipped (cumulative) exports sales	2024/25 YTD	4,733	2,943	6,172	5,256	327	19,431	45,015	43,897	108,343
	2023/24 YTD	3,280	4,114	5,961	3,663	504	17,521	35,396	39,123	92,040
	YTD 2024/25 as % of 2023/24	144	72	104	143	65	111	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 5/8/2025	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	2144	20,683	19,766	5	17,746
Japan	514	10,638	8,780	21	9,366
China	0	33	2,264	-99	8,233
Colombia	0	6,307	5,109	23	4,383
Korea	0	5,164	2,133	142	1,565
Top 5 importers	2,658	42,825	38,052	13	41,293
Total U.S. corn export sales	2,754	62,088	48,366	28	51,170
% of YTD current month's export projection	4%	94%	83%	-	-
Change from prior week	509	1,677	742	-	-
Top 5 importers' share of U.S. corn export sales	97%	69%	79%	-	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 5/8/2025	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	23,839	-6	28,636
Mexico	205	4,714	4,585	3	4,917
Japan	63	1,826	1,892	-3	2,231
Egypt	0	2,943	1,025	187	2,228
Indonesia	0	1,644	1,783	-8	1,910
Top 5 importers	268	33,607	33,124	1	39,922
Total U.S. soybean export sales	1,008	48,003	42,602	13	51,302
% of YTD current month's export projection	2%	95%	92%	-	-
Change from prior week	490	282	266	-	-
Top 5 importers' share of U.S. soybean export sales	27%	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 5/08/2025	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	613	3,942	3,298	20	3,298
Philippines	300	2,652	2,854	-7	2,494
Japan	255	2,112	1,959	8	2,125
China	0	139	2,118	-93	1,374
Korea	221	2,419	1,384	75	1,274
Taiwan	108	1,015	1,104	-8	921
Nigeria	69	758	276	175	920
Thailand	0	950	460	106	552
Colombia	123	511	328	56	522
Vietnam	0	589	425	39	313
Top 10 importers	1689	15,086	14,204	6	13,792
Total U.S. wheat export sales	3,298	21,479	18,916	14	18,323
% of YTD current month's export projection	15%	96%	98%	-	-
Change from prior week	746	59	78	-	-
Top 10 importers' share of U.S. wheat export sales	51%	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.

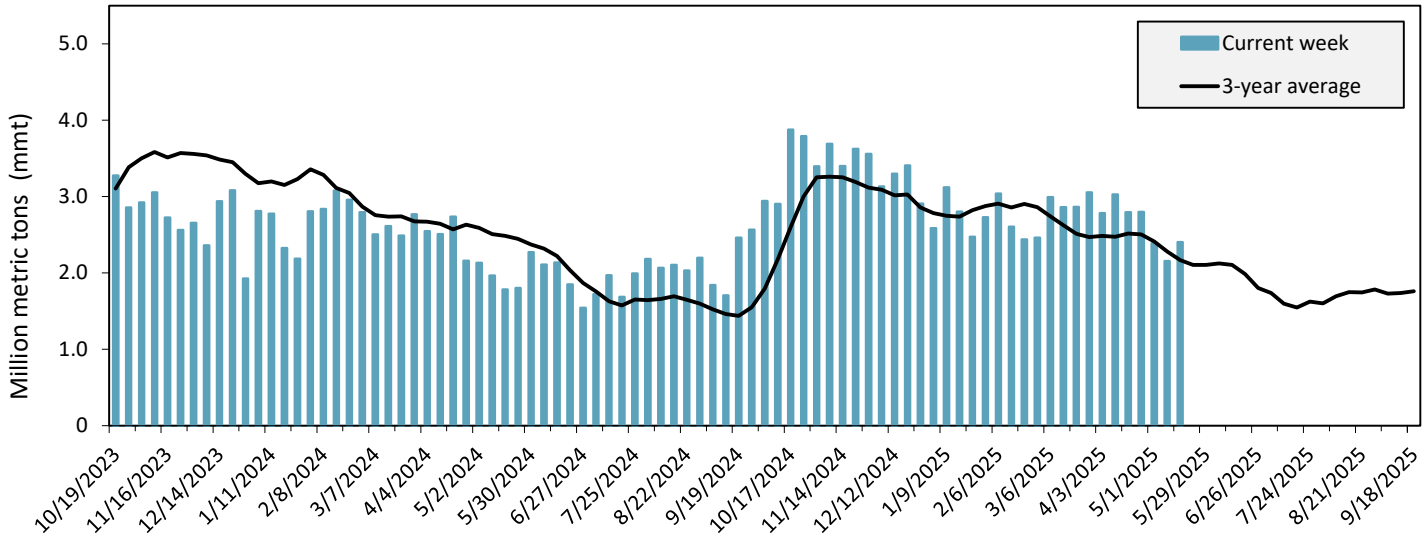
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 05/15/2025	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	517	593	87	9,985	7,346	136	137	153	13,987
	Soybeans	0	0	n/a	1,966	2,502	79	396	133	10,445
	Wheat	215	247	87	4,173	3,925	106	149	186	11,453
	All grain	737	840	88	16,218	14,667	111	134	142	37,186
Mississippi Gulf	Corn	903	503	179	14,247	9,758	146	134	105	27,407
	Soybeans	110	293	38	9,404	10,250	92	105	75	29,741
	Wheat	64	23	281	1,313	2,297	57	50	69	4,523
	All grain	1,077	820	131	24,964	22,361	112	116	95	61,789
Texas Gulf	Corn	0	0	n/a	105	204	51	n/a	n/a	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	61	73	83	1,271	571	223	538	149	1,940
	All grain	61	73	83	1,567	2,471	63	86	57	6,965
Interior	Corn	292	193	151	4,920	5,122	96	117	143	13,463
	Soybeans	106	143	74	2,547	2,900	88	119	121	8,059
	Wheat	74	57	129	1,136	1,037	110	144	160	2,952
	All grain	508	405	126	8,800	9,169	96	126	144	24,753
Great Lakes	Corn	0	0	n/a	0	0	n/a	n/a	n/a	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	10	5	209	93	111	83	77	103	653
	All grain	10	5	209	93	129	72	57	43	1,060
Atlantic	Corn	7	10	68	148	163	91	147	165	410
	Soybeans	2	3	52	438	424	103	135	14	1,272
	Wheat	0	0	n/a	27	10	260	n/a	229	73
	All grain	9	14	64	614	598	103	241	56	1,754
All Regions	Corn	1,719	1,300	132	29,405	22,594	130	130	124	56,109
	Soybeans	218	440	50	14,565	16,148	90	119	86	50,865
	Wheat	424	405	105	8,012	7,951	101	133	145	21,594
	All grain	2,402	2,156	111	52,359	49,447	106	122	112	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.

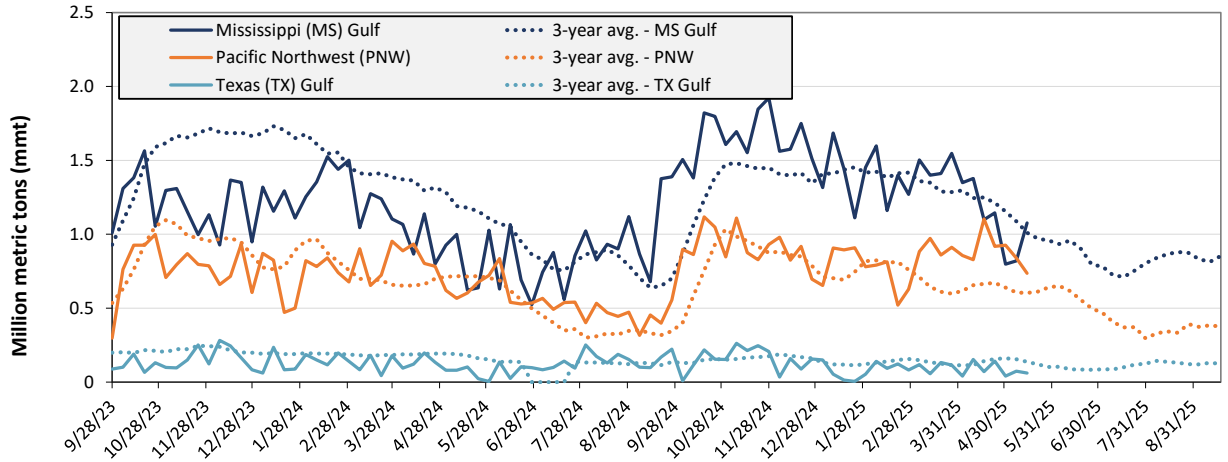
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending May. 15: 2.4 mmt of grain inspected, up 11 percent from the previous week, up 38 percent from the same week last year, and up 11 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 05/15/25 inspections (mmt):
MS Gulf: 1.08
PNW: 0.74
TX Gulf: 0.06

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 31	down 17	up 27	down 12
Last year (same 7 days)	up 67	down 15	up 59	up 24
3-year average (4-week moving average)	up 7	down 56	un-changed	up 22

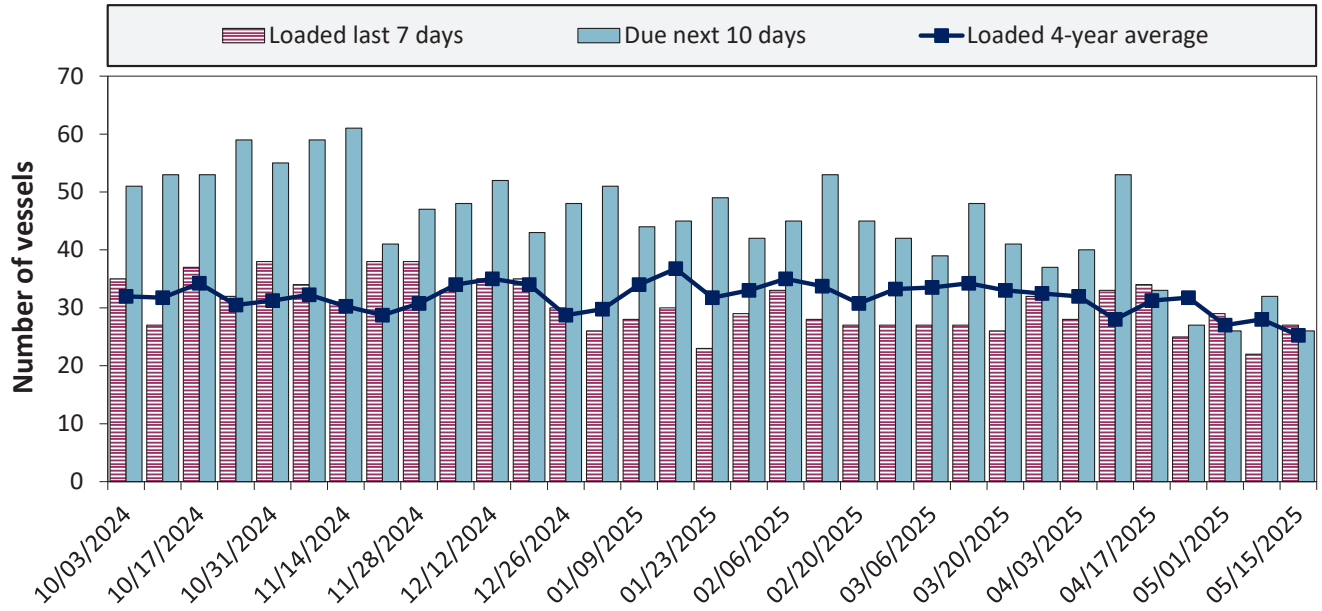
Source: USDA, Federal Grain Inspection Service.

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
5/15/2025	20	27	26	14
5/8/2025	19	22	32	13
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.

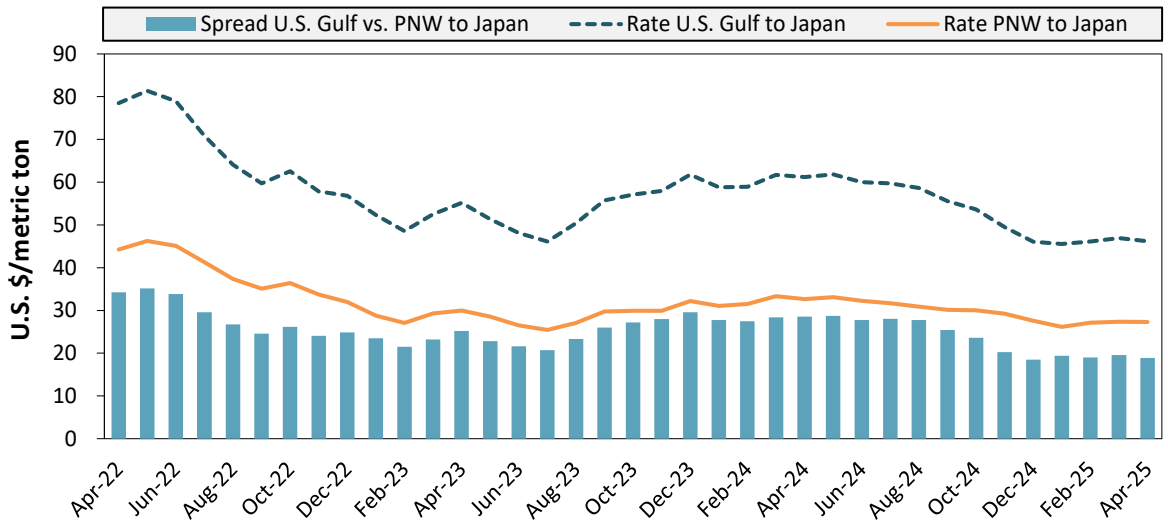
Figure 19. U.S. Gulf vessel loading activity



Week ending 05/15/25, number of vessels	Loaded	Due
Change from last year	42%	-28%
Change from 4-year average	7%	-38%

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.

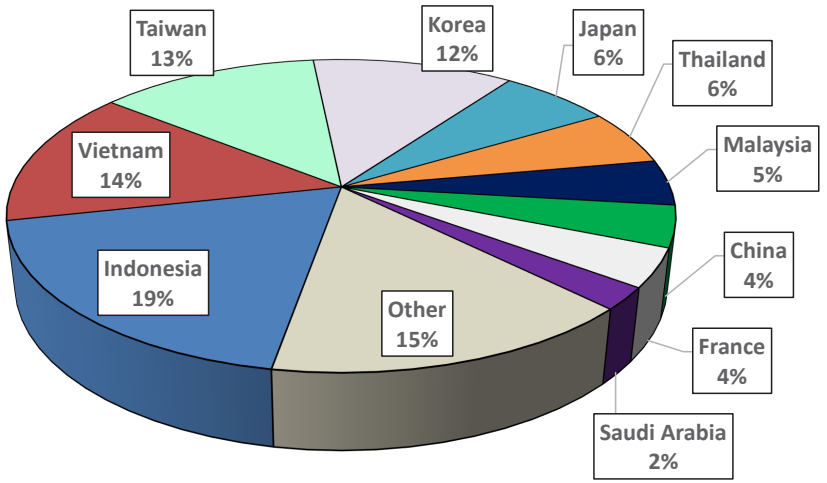
Table 20. Ocean freight rates for selected shipments, week ending 5/17/2025

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
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	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	Wheat & Corn	Feb 25, 2025	Mar 1/20, 2025	35,000	32.85
EC S. America	Chian	Heavy grain	May 16, 2025	Jun 12/22, 2025	80,000	33.40
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
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 13, 2025	May 1/31, 2025	63,000	35.00

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.

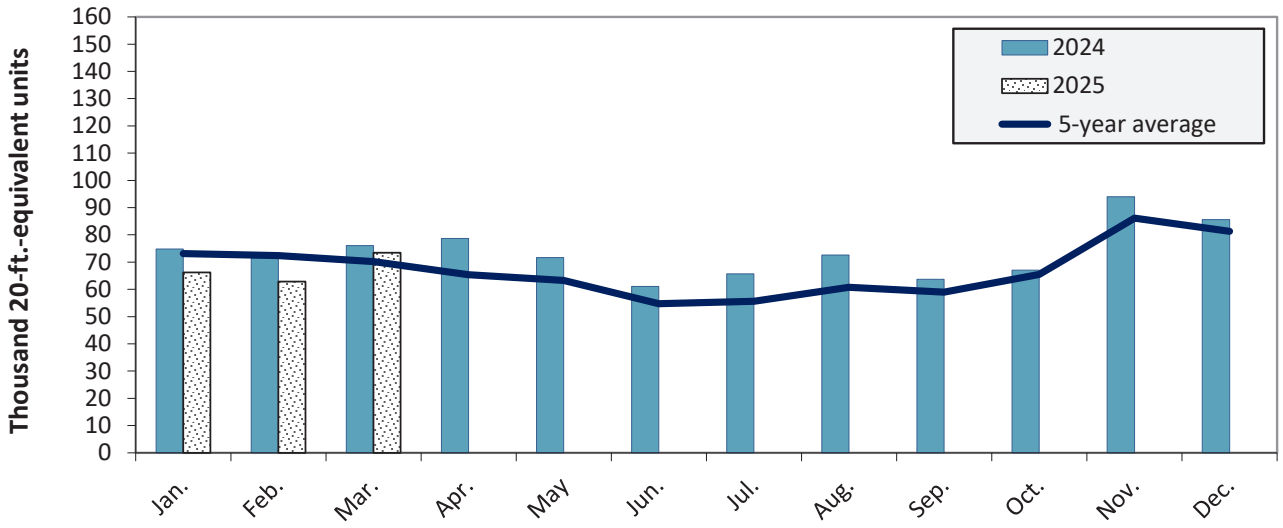
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

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