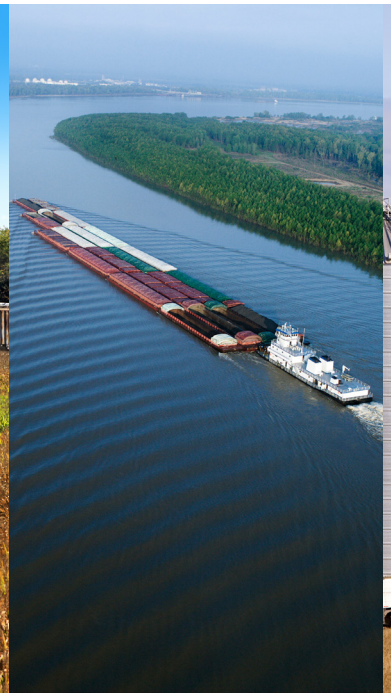
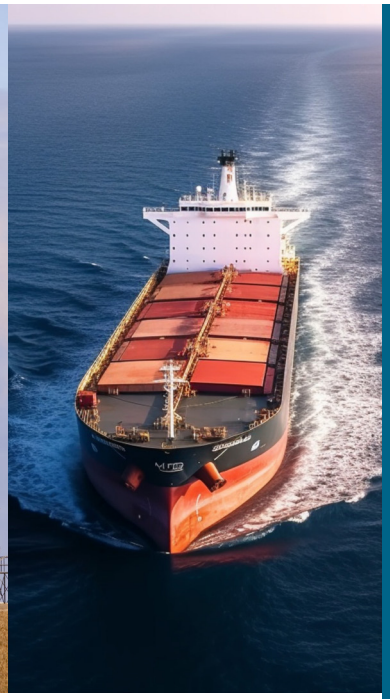
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

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Carriers Adjust Vessel Fleets in Response to USTR Fees. According to a May 16 *Journal of Commerce (JOC) article*, CMA CGM is rearranging its fleet to use only non-Chinese-built vessels in its U.S. trade. The adjusted fleet would avoid new fees (effective October 14) on Chinese operators and Chinese-built ships entering U.S. ports. The fees are part of a set of actions by the Office of the U.S. Trade Representative (USTR) aimed at thwarting Chinese dominance in the shipbuilding sector (*Grain Transportation Report (GTR), April 24, 2024, first highlight*).

According to CMA CGM, less than half its fleet of 680 ships are Chinese-built, and JOC noted (on May 15) MSC is similarly situated to be able to accommodate the fees. However, other carriers, such as Hapag-Lloyd, may have a harder time avoiding the fees, at least in the short term, according to JOC.

According to PIERS data, CMA-CGM was the top carrier of U.S. containerized grain exports in 2024. MSC was third, and Hapag-Lloyd was seventh. COSCO and OOCL, both Chinese-owned carriers, were the fifth- and sixth-top containerized grain carriers in 2024, respectively. About 10 percent of waterborne grain exports are containerized.

BNSF Holds Third Auction for MY 2025/26 Shuttle Trains. On May 28, BNSF Railway (BNSF) held its third auction—for yearlong shuttle train contracts—that the railroad has scheduled ahead of the new marketing year (MY). Over the course of these three auctions, BNSF has allocated 85 of its 140 shuttles, and the remaining shuttles (which are set to begin in 2026) will likely be auctioned off later this year.

In its May 28 auction, BNSF sold 24 shuttles for $21.4 million. The winning bids ranged from $800,000 to $1.1 million, and they averaged $890,000. Assuming an average of 2.5 turns per month, an $890,000 yearlong shuttle contract represents about $270 per car, per trip.

Over the course of BNSF's three auctions (which allocated 85 shuttles), winning bids averaged $740,000 per shuttle. This value is lower than last year (GTR, November 21, 2024).

DCR Bridge Closure Impacts Feed Mills in Delmarva Peninsula. On May 23, the Delmarva Central Railroad (DCR)—a short line railroad that operates 188 miles of track in Delaware, Maryland, and Virginia—issued an embargo following the closure of a bridge in Seaford, DE, for emergency repair. Norfolk Southern Railway, which interchanges with DCR, also issued an embargo because of the bridge outage.

The Seaford bridge outage impacts several downstream feed mills—including Amick Farms' feed mill in Delmar, DE; Perdue Farms' feed mill and soybean crush facility in Salisbury, MD; and Mountaire Farms' feed mill in Westover, MD. Due to its large poultry industry, the Delmarva Peninsula relies on additional shipments of grain by rail.

According to the Surface Transportation Board's public Carload Waybill Sample (available on AgTransport), railroads terminated 340,000 tons (about 3,000 cars) of corn in 2023 in the "Salisbury, MD-DE-VA" Bureau of Economic Analysis area—6 percent above the prior 5-year average.

Strong HRW Wheat Export Sales Signal Future Transportation Demand. According to USDA's Foreign Agricultural Service, wheat export sales for marketing year (MY) 2025/26—which begins on June 1—are 4.18 million metric tons (mmt). This export sales volume marks the largest new crop sales for this date (week ending May 15) since 2013. Among wheat classes, the 1.5 mmt in sales volume for hard red winter (HRW) wheat is the largest new crop sales for this date (week ending May 15) since 2008.

If realized, the higher HRW wheat exports should raise the demand for rail transportation. Recently, both BNSF Railway (BNSF) and Union Pacific Railroad (UP) announced substantial decreases to their rail tariff rates for HRW wheat. For example, BNSF's tariff rate from Wichita, KS, to Houston, TX, will fall $511 (from $4,411 to $3,900)—the largest decline for that rate since at least 2010 and the first time since December 2016 it has been less than $4,000 per car (*GTR, May 8, 2025, first highlight*).

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 15, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 22.43 million metric tons (mmt), down 3 percent from last week and up 31 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.19 mmt, down 29 percent from last week. Net **soybean export sales** were 0.31 mmt, up 9 percent from last week. Net **wheat export sales** for MY 2024/25 were -0.013 mmt, down 123 percent from last week.

Rail

U.S. Class I railroads originated 25,478 **grain carloads** during the week ending May 17. This is unchanged from the previous week, 10 percent more than last year, and 10 percent more than the 3-year average.

Average June **shuttle secondary railcar bids/offers** (per car) were $109 below tariff for the week ending May 22. This was $6 more than last week and $109 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were at tariff. This was $42 less than last week, and $79 lower than this week last year.

Barge

For the week ending May 24, **barged grain movements** totaled 734,650 tons. This was 17 percent less than the previous week and 34 percent more than the same period last year.

For the week ending May 24, 514 grain barges **moved down river**—77 fewer than last week. There were 545 grain barges **unloaded** in the New Orleans region, 12 percent fewer than last week.

Ocean

For the week ending May 22, 22 **oceangoing grain vessels** were loaded in the Gulf—16 percent more than the same period last year. Within the next 10 days (starting May 23), 38 vessels were expected to be loaded—19 percent more than the same period last year.

As of May 22, 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, unchanged from the previous week.

Fuel

For the week ending May 26, the U.S. average **diesel price** decreased 4.9 cents from the previous week, to $3.487 per gallon—27.1 cents below the same week last year.

Soybean Landed Costs Rose in the United States; Fell in Brazil—in First Quarter 2025

The United States and Brazil are the world's two leading producers of soybeans. Both countries compete for the same overseas markets, including China and Europe. Low transportation and landed costs are key to staying competitive on the global market. This article compares quarterly and yearly changes in the costs of moving soybeans from the United States and Brazil to Shanghai, China (table 1) and to Hamburg, Germany (table 2).

Quarter-to-Quarter Transportation Costs. From fourth quarter 2024 to first quarter 2025 (quarter to quarter), costs rose for exporting soybeans by all routes (through the U.S. Gulf and Pacific Northwest (PNW)) to China (table 1) and by all routes to Germany (table 2). The rises in U.S. Gulf transportation costs owed to rising truck rates, as well as grain movements diverted from barge to rail (through the upper Mississippi River (UMR) to St. Louis).[1] Parts of the UMR were impassable by barge because of ice.

In the United States, truck rates rose partly because of higher diesel fuel prices (GTR fig. 13, *Grain Truck and Ocean Rate Advisory*, May 2025). Compared to the previous quarter, barge rates fell, partly because of a significant drop in soybean exports through the Mississippi River System. Rail tariff rates (plus fuel surcharge) also fell slightly. Ocean freight rates fell because of an ample vessel supply and a seasonal lull in demand caused by holidays around the world, including the Chinese Lunar New Year celebrations (GTR, May 8, 2025).

In Brazil, transportation costs rose, mainly in response to higher truck and ocean freight rates.

Year-to-Year Transportation Costs. From first quarter 2024 to first quarter 2025 (year to year), transportation costs fell for U.S. Gulf and PNW routes to Shanghai, China (table 1) and rose for U.S. Gulf routes to Hamburg, Germany (table 2). From the U.S. Gulf to China, transportation costs fell because the drop in ocean freight rates outpaced increases in truck, rail, and barge rates. Barge rates rose because of weather- and lock-repair-related delays in the Mississippi River System, as well as higher export sales, especially for corn (GTR, April 24, 2025). From the PNW to China, decreases in rail and ocean rates pushed down transportation costs.

In Brazil, year-to-year transportation costs fell because of lower truck rates.

Quarter-to-Quarter Landed Costs. Quarter to quarter, landed costs rose for all U.S. routes, with the exception of the PNW to China routes, for which landed costs were almost unchanged. For shipments out of the United States, landed-cost increases reflected rising transportation costs and farm values. In first quarter 2025, transportation's share of U.S. landed costs was 23-26 percent for shipments to China and 20-23 percent for shipments to Germany (tables 1 and 2).

In Brazil, landed costs fell because of lower farm values. Transportation's share of Brazil's total landed costs was 21-27 percent for shipments to China and 21-27 percent for shipments to Germany (tables 1 and 2).

Year-to-Year Landed Costs. Year to year, landed costs fell in the United States and Brazil. In the United States, for shipments to China, the decreased landed costs reflected falling transportation costs and farm values. For shipments to Europe, decreases in landed costs mainly reflected falling farm values.

In Brazil, landed-cost decreases reflected falling transportation costs and falling soybean farm values.

1 In calculations of transportation costs to account for the UMR closures for winter, northern soybeans are assumed to have shipped by rail before being transferred to barge farther downriver in St. Louis. The shipments detoured from barge to rail for the UMR stretch were subject to rail rates that were much higher than barge rates for that segment of the river.

U.S. Exports to China. According to USDA/Foreign Agricultural Service's Global Agricultural Trade System (GATS) data, in first quarter 2025, the United States exported 5.2 million metric tons (mmt) of soybeans to China—down sharply from 16.1 mmt in the previous quarter and down 41 percent from first quarter 2024.

Total U.S. Exports. According to GATS data, 7.9 million metric tons (mmt) of soybeans were exported through the U.S. Gulf (New Orleans, LA, Mobile, AL, and Houston-Galveston, TX) in first quarter 2025. This volume was down from 15.4 million metric tons in fourth quarter 2024—a 49-percent decline. A total of 1.6 mmt of soybeans were exported through the PNW in first quarter 2025, down from 8.0 mmt in fourth quarter of 2024—an 80-percent decline.

According to USDA's May *World Agricultural Supply and Demand Estimates* report, for marketing year (MY) 2025/26, total U.S. soybean exports are projected at 49.4 mmt, down from 50.4 mmt in MY 2024/25. Brazil is projected to export 112.0 mmt in MY 2025/26, up from 104.5 mmt in MY 2024/25. For more on soybean transportation in Brazil, see *Brazil Soybean Transportation*.

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Table 1. Quarterly costs of transporting soybeans from United States and Brazil to Shanghai, China

Route	Cost	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change		2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--$/mt--					--$/mt--				
United States via U.S. Gulf	Truck	16.11	17.87	21.68	34.57	21.32	16.11	17.87	21.68	34.57	21.32
	Rail	40.29	-	42.36	5.14	-	23.97	-	26.50	10.55	-
	Barge	13.63	48.92	18.65	36.83	-61.88	13.63	39.00	18.65	36.83	-52.18
	Ocean	58.99	48.39	44.57	-24.44	-7.89	58.99	48.39	44.57	-24.44	-7.89
	Total transportation	129.02	115.18	127.26	-1.36	10.49	112.70	105.26	111.40	-1.15	5.83
	Farm value	433.58	356.54	358.37	-17.35	0.51	440.92	359.35	365.72	-17.06	1.77
	Landed cost	562.60	471.72	485.63	-13.68	2.95	553.62	464.61	477.12	-13.82	2.69
	Transport % of landed cost	22.93	24.42	26.21	3.27	1.79	20.36	22.66	23.35	2.99	0.69
Route	Cost	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change		2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Fargo, ND					Sioux Falls, SD				
		--$/mt--					--$/mt--				
United States via PNW	Truck	16.11	17.87	21.68	34.57	21.32	16.11	17.87	21.68	34.57	21.32
	Rail	64.88	61.84	61.59	-5.07	-0.40	66.19	62.98	62.71	-5.26	-0.43
	Ocean	31.44	28.34	26.25	-16.51	-7.37	31.44	28.34	26.25	-16.51	-7.37
	Total transportation	112.43	108.05	109.52	-2.59	1.36	113.74	109.19	110.64	-2.73	1.33
	Farm value	420.10	347.47	346.49	-17.52	-0.28	433.58	350.78	358.86	-17.23	2.30
	Landed cost	532.53	455.52	456.01	-14.37	0.11	547.32	459.97	469.50	-14.22	2.07
	Transport % of landed cost	21.11	23.72	24.02	2.90	0.30	20.78	23.74	23.57	2.78	-0.17
Route	Cost	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change		2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--$/mt--					--$/mt--				
Brazil	Truck	91.79	70.75	83.54	-8.99	18.08	54.67	41.56	50.71	-7.24	22.02
	Ocean	34.70	34.40	36.00	3.75	4.65	36.20	35.80	37.50	3.59	4.75
	Total transportation	126.49	105.15	119.54	-5.49	13.69	90.87	77.36	88.21	-2.93	14.03
	Farm Value	349.39	386.58	317.36	-9.17	-17.91	353.29	363.97	324.60	-8.12	-10.82
	Landed Cost	475.88	491.73	436.90	-8.19	-11.15	444.16	441.33	412.81	-7.06	-6.46
	Transport % of landed cost	26.58	21.38	27.36	0.78	5.98	20.46	17.53	21.37	0.91	3.84

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Rates for the first and fourth quarters 2024 were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed costs are transportation cost plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Source: USDA, Agricultural Marketing Service.

Table 2. Quarterly costs of transporting soybeans from United States and Brazil to Hamburg, Germany

Route	Cost	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change		2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		Minneapolis, MN					Davenport, IA				
		--$/mt--					--$/mt--				
United States via U.S. Gulf	Truck	16.11	17.87	21.68	34.57	21.32	16.11	17.87	21.68	34.57	21.32
	Rail	40.29	-	42.36	5.14	-	23.97	-	26.50	10.55	-
	Barge	13.63	48.92	18.65	36.83	-61.88	13.63	39.00	18.65	36.83	-52.18
	Ocean	29.76	23.64	22.53	-24.29	-4.70	29.76	23.64	22.53	-24.29	-4.70
	Total transportation	99.79	90.43	105.22	5.44	16.36	83.47	80.51	89.36	7.06	10.99
	Farm value	433.58	356.54	358.37	-17.35	0.51	440.92	359.35	365.72	-17.06	1.77
	Landed cost	533.37	446.97	463.59	-13.08	3.72	524.39	439.86	455.08	-13.22	3.46
	Transport % of landed cost	18.71	20.23	22.70	3.99	2.46	15.92	18.30	19.64	3.72	1.33
Route	Cost	2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change		2024 1st qtr.	2024 4th qtr.	2025 1st qtr.	Percent change	
					Yr. to yr.	Qtr. to qtr.				Yr. to yr.	Qtr. to qtr.
		North MT - Santos					South GO - Paranagua				
		--$/mt--					--$/mt--				
Brazil	Truck	91.79	70.75	83.54	-8.99	18.08	54.67	41.56	50.71	-7.24	22.02
	Ocean	32.60	32.20	33.90	3.99	5.28	32.20	32.10	33.60	4.35	4.67
	Total transportation	124.39	102.95	117.44	-5.59	14.07	86.87	73.66	84.31	-2.95	14.46
	Farm Value	349.39	386.58	317.36	-9.17	-17.91	353.29	363.97	324.60	-8.12	-10.82
	Landed Cost	473.78	489.53	434.80	-8.23	-11.18	440.16	437.63	408.91	-7.10	-6.56
	Transport % of landed cost	26.25	21.03	27.01	0.76	5.98	19.74	16.83	20.62	0.88	3.79

Note: Rail rates include fuel surcharges, but do not include the cost of purchasing empty rail cars in the secondary rail markets. That cost could exceed the rail tariff rate plus fuel surcharge shown in the table. Rates for the first and fourth quarters 2024 were revised from what were previously published. Source for the U.S. Ocean freight rates: O'Neil Commodity Consulting. Source for the U.S. farm values: USDA, National Agricultural Statistics Service. Landed cost are transportation cost plus farm value. For transportation as a percentage of landed costs, the year-to-year and quarter-to-quarter columns record percentage-point differences. Brazil's producing regions: MT= Mato Grosso, GO = Goiás. Brazil's export ports: Santos and Paranagua. Source for Brazil's ocean freight rates: University of São Paulo, Brazil, and USDA, Agricultural Marketing Service. Source for Brazil's farm values: Companhia Nacional de Abastecimento. qtr. = quarter; yr. = year; mt = metric ton; "-" indicates data not required or applicable. Totals may not add up exactly because of rounding.
Source: USDA, Agricultural Marketing Service.

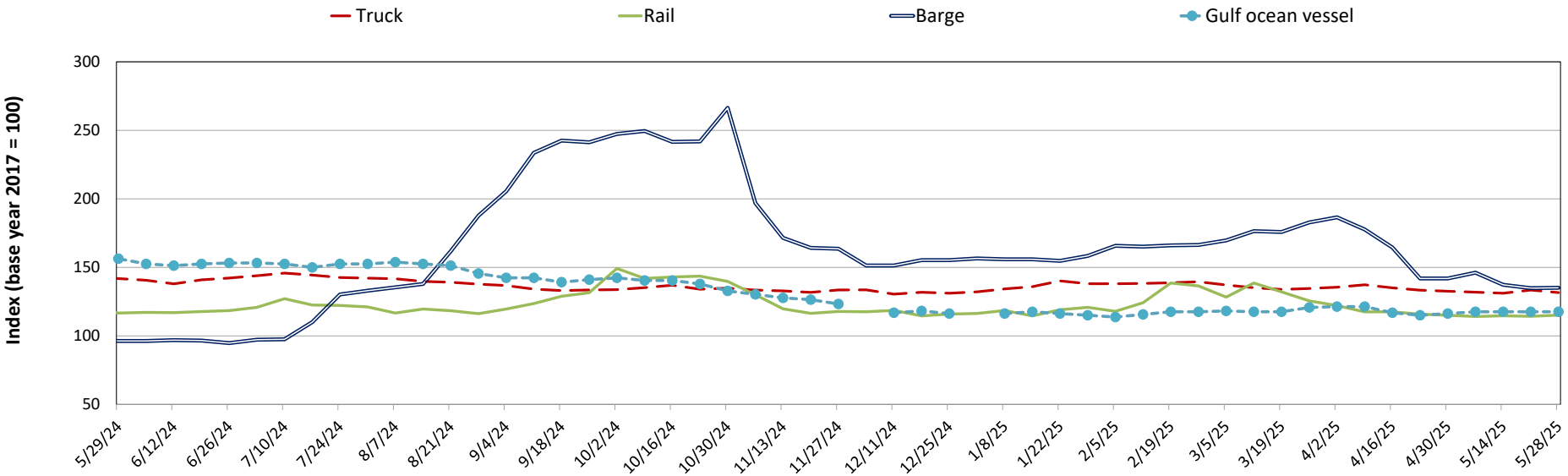
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
05/28/25	132	115	135	118	128
05/21/25	133	114	135	118	128
05/29/24	142	117	96	156	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.

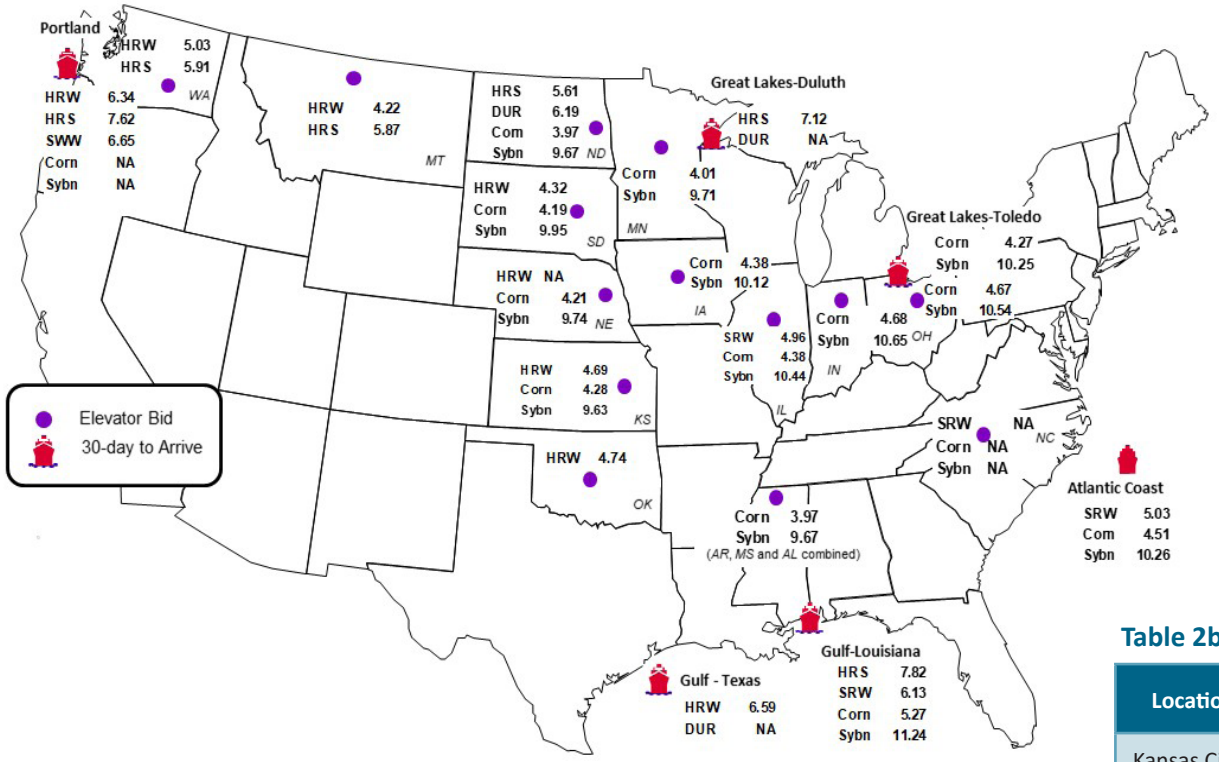
Figure 1. Grain transportation cost indicators as of week ending 5/28/25



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	5/23/2025	5/16/2025
Corn	IL–Gulf	-0.89	-0.87
Corn	NE–Gulf	-1.06	-1.06
Soybean	IA–Gulf	-1.12	-1.16
HRW	KS–Gulf	-1.90	-1.95
HRS	ND–Portland	-2.01	-2.08

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	5/23/2025	Week ago 5/16/2025	Year ago 5/24/2024
Kansas City	Wheat	July	5.386	5.164	7.342
Minneapolis	Wheat	July	6.064	5.732	7.526
Chicago	Wheat	July	5.422	5.240	7.040
Chicago	Corn	July	4.594	4.434	4.632
Chicago	Soybean	July	10.602	10.498	12.352

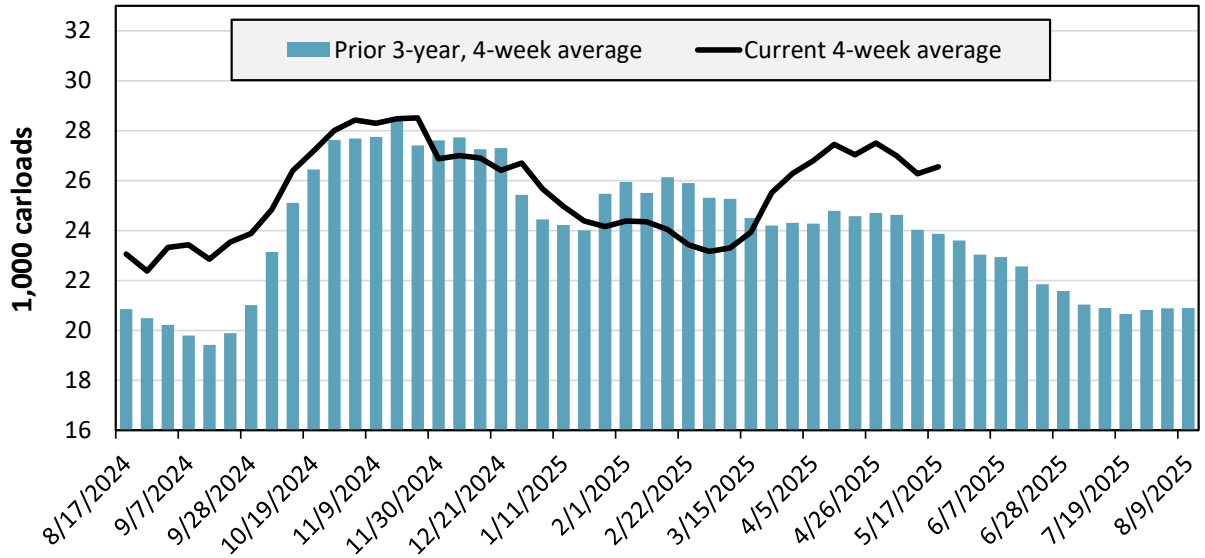
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 5/17/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,560	3,073	10,525	5,950	3,079	1,291	25,478
This week last year	1,627	2,738	10,628	4,924	2,373	846	23,136
2025 YTD	33,077	57,769	220,464	115,405	52,076	27,957	506,748
2024 YTD	33,247	53,383	214,898	105,372	56,857	19,491	483,248
2025 YTD as % of 2024 YTD	99	108	103	110	92	143	105
Last 4 weeks as % of 2024	89	113	108	126	132	195	116
Last 4 weeks as % of 3-yr. avg.	88	114	109	116	118	123	111
Total 2024	87,911	143,353	557,544	279,532	142,383	58,512	1,269,235

Note: The last 4-week percentages compare the most recent 4 weeks of data to the analogous 4 weeks from the prior year and to the analogous 4 weeks in the prior 3 years. NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.
Source: Surface Transportation Board.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending May 17, grain carloads were up 1 percent from the previous week, up 16 percent from last year, and up 11 percent from the 3-year average.

Source: Surface Transportation Board.

Table 4a. Rail service metrics—grain unit train origin dwell times and train speeds

For the week ending: 5/16/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	27.0	31.8	19.1	18.6	7.6	32.0	22.7
	Average over last 4 weeks	34.6	30.6	18.5	16.5	7.6	n/a	21.6
	Average of same 4 weeks last year	25.3	34.7	16.4	17.3	5.1	n/a	19.8
Average grain unit train speeds (miles per hour)	This week	22.3	19.1	24.9	23.0	24.7	16.8	21.8
	Average over last 4 weeks	22.2	19.1	25.1	22.6	24.7	n/a	22.7
	Average of same 4 weeks last year	22.8	19.1	24.9	23.3	24.9	n/a	23.0

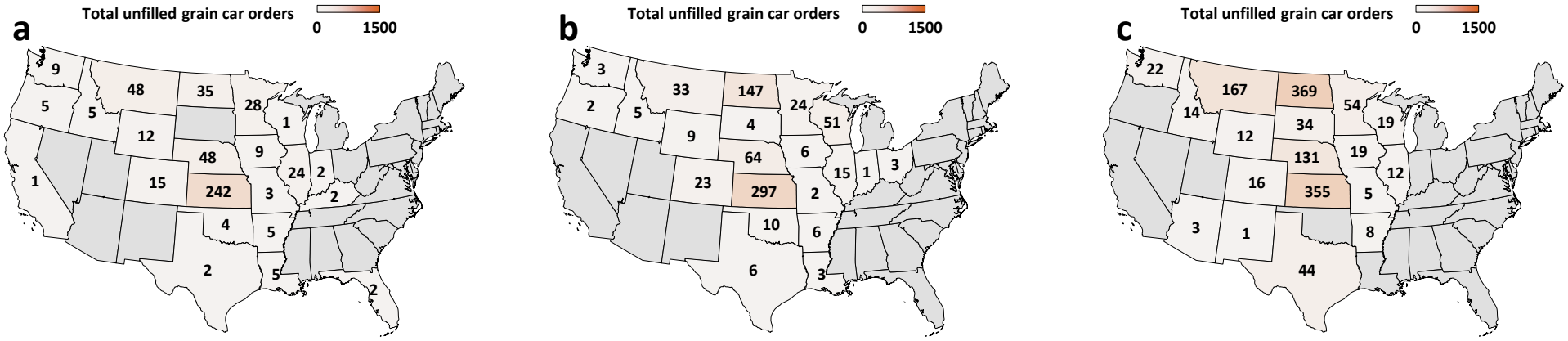
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 5/16/2025		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	28	7	220	80	7	139	481
	Average over last 4 weeks	44	9	255	91	6	n/a	405
	Average of same 4 weeks last year	16	8	481	90	4	n/a	599
Average number of loaded grain cars not moved in over 48 hours	This week	37	171	403	71	0	335	1,017
	Average over last 4 weeks	57	182	272	67	2	n/a	579
	Average of same 4 weeks last year	17	223	736	91	2	n/a	1,069
Average number of grain unit trains held	This week	0	0	3	5	0	7	15
	Average over last 4 weeks	0	0	5	5	0	n/a	10
	Average of same 4 weeks last year	0	3	17	5	0	n/a	25
Total unfilled manifest grain car orders	This week	4	3	138	333	0	38	516
	Average over last 4 weeks	4	3	126	414	0	n/a	546
	Average of same 4 weeks last year	0	3	857	389	0	n/a	1,250

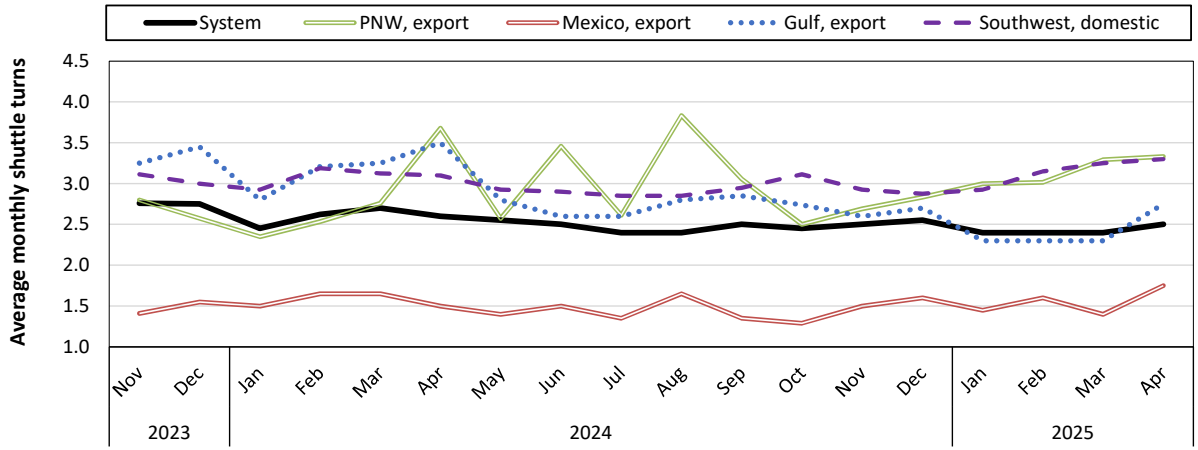
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 5/16/2025 (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

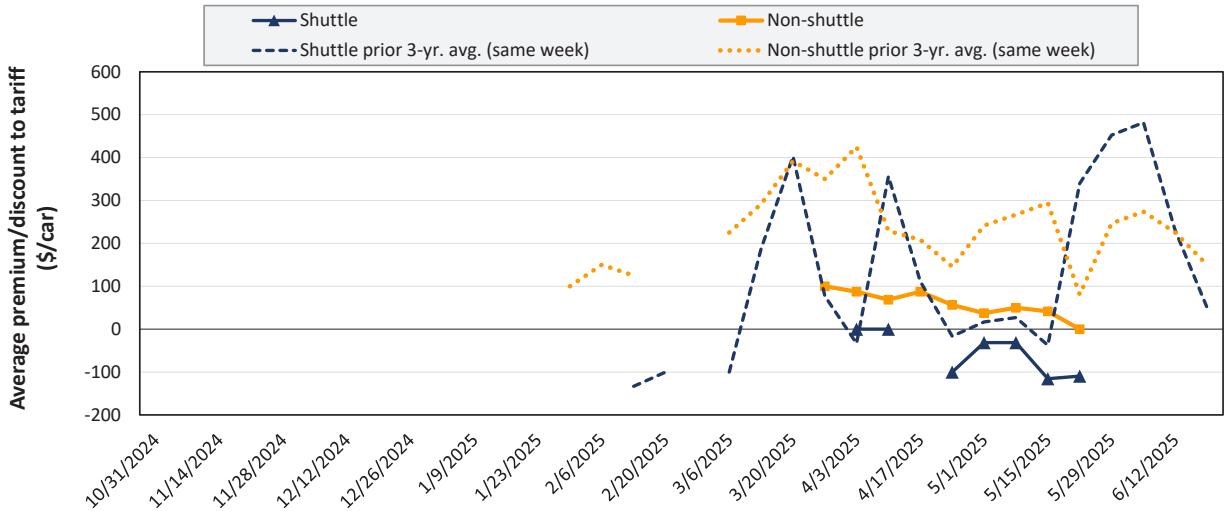


Average monthly systemwide grain shuttle turns for April 2025 were 2.5. By destination region, average monthly grain shuttle turns were 3.33 to PNW, 1.75 to Mexico, 2.75 to the Gulf, and 3.3 to the Southwest.

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 June 2025



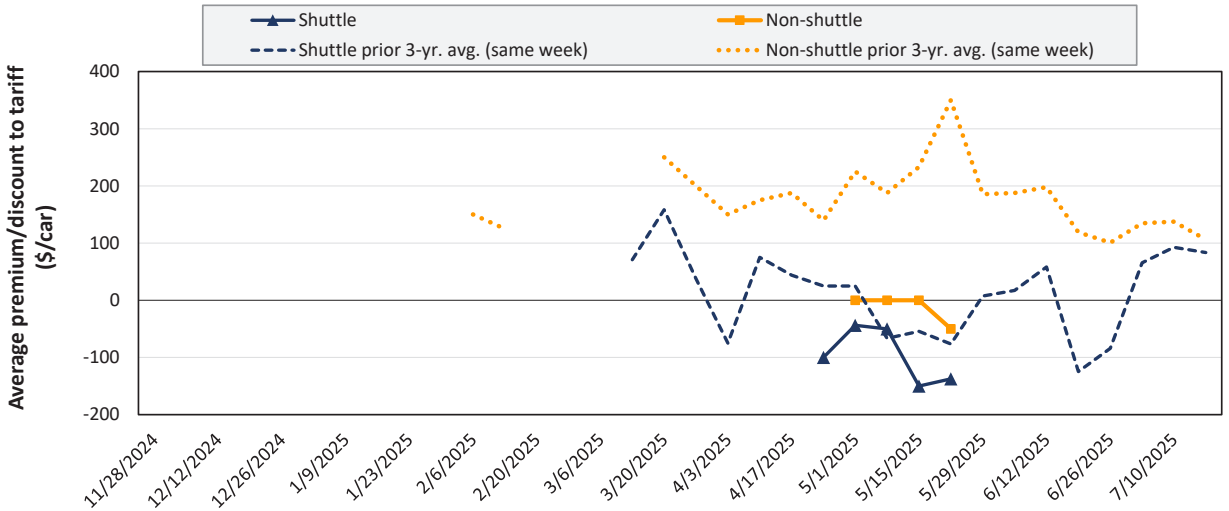
Average non-shuttle bids/offers fell $42 this week, and are $100 below the peak.

Average shuttle bids/offers rose $6 this week and are $109 below the peak.

5/22/2025	BNSF	UP
Non-Shuttle	$125	-$125
Shuttle	$50	-$269

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
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 July 2025



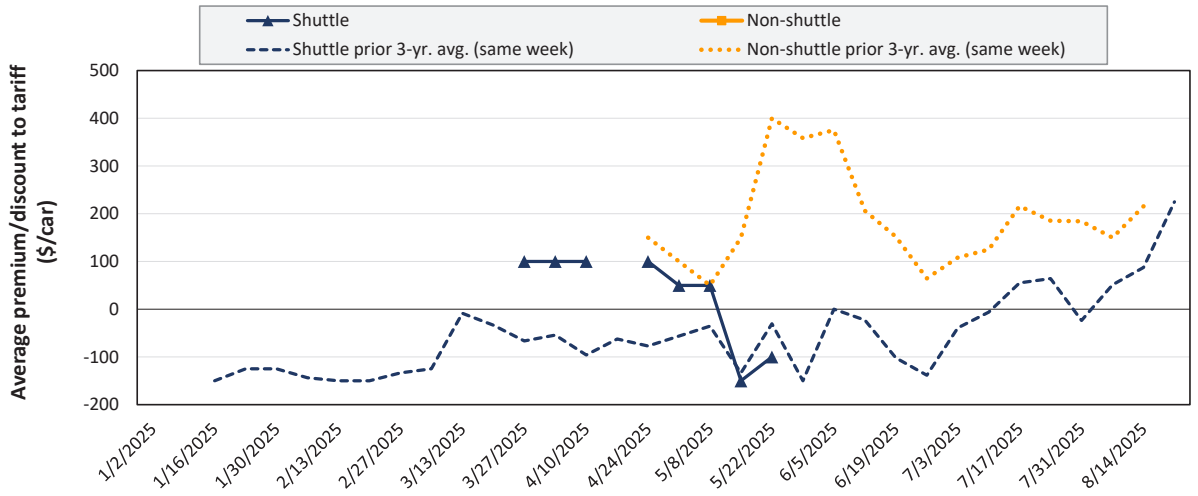
Average non-shuttle bids/offers fell $50 this week, and are $50 below the peak.

Average shuttle bids/offers rose $13 this week and are $94 below the peak.

5/22/2025	BNSF	UP
Non-Shuttle	n/a	-$50
Shuttle	-$50	-$225

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
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 August 2025



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

Average shuttle bids/offers rose $50 this week and are $200 below the peak.

5/22/2025	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	-$100	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
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: 5/22/2025		Delivery period					
		May-25	Jun-25	Jul-25	Aug-25	Sep-25	Oct-25
Non-shuttle	BNSF	250	125	n/a	n/a	n/a	n/a
	Change from last week	50	-8	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-83	n/a	n/a	n/a	n/a
	UP	n/a	-125	-50	n/a	n/a	n/a
	Change from last week	n/a	-75	-50	n/a	n/a	n/a
	Change from same week 2024	n/a	-75	-50	n/a	n/a	n/a
Shuttle	BNSF	-50	50	-50	-100	n/a	850
	Change from last week	0	56	25	50	n/a	200
	Change from same week 2024	n/a	-50	-25	n/a	n/a	n/a
	UP	-175	-269	-225	n/a	n/a	n/a
	Change from last week	46	-44	0	n/a	n/a	n/a
	Change from same week 2024	-75	-169	-125	n/a	n/a	n/a
	CPKC	-100	-50	-50	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	0	0	-50	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. 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.

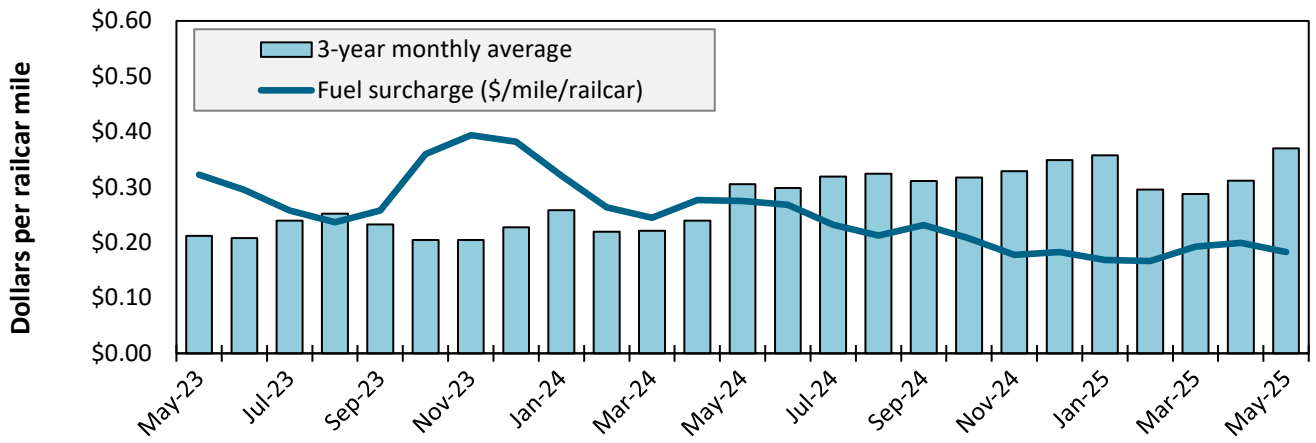
Source: BNSF, CN, CPKC, CSX, and UP.

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
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,091	$50.11	$1.27	-0.4	3.9
Soybeans	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).

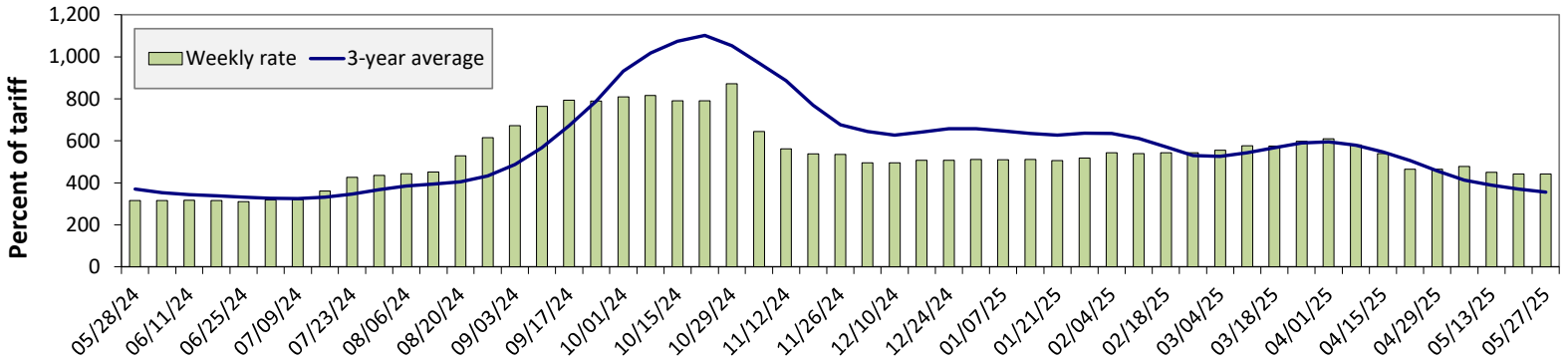
Figure 9. Railroad fuel surcharges, North American weighted average



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 27: there is no change from the previous week; 40 percent higher than last year; and 25 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

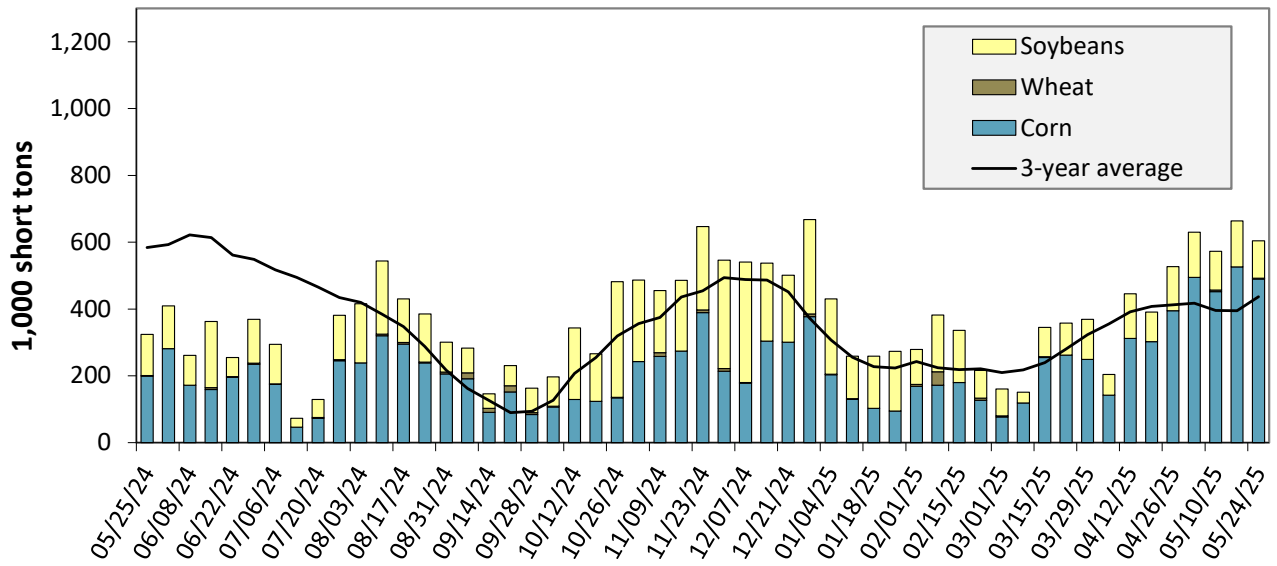
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	5/27/2025	491	458	442	316	326	296
	5/20/2025	482	457	441	314	331	294
$/ton	5/27/2025	30.39	24.37	20.51	12.61	15.29	9.29
	5/20/2025	29.84	24.31	20.46	12.53	15.52	9.23
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	37	35	40	43	32	44
	3-year avg.	9	16	25	21	4	19
Rate	June	473	440	424	311	327	291
	August	511	478	455	413	414	405

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 24: 86 percent higher than last year and 38 percent higher than the 3-year average.

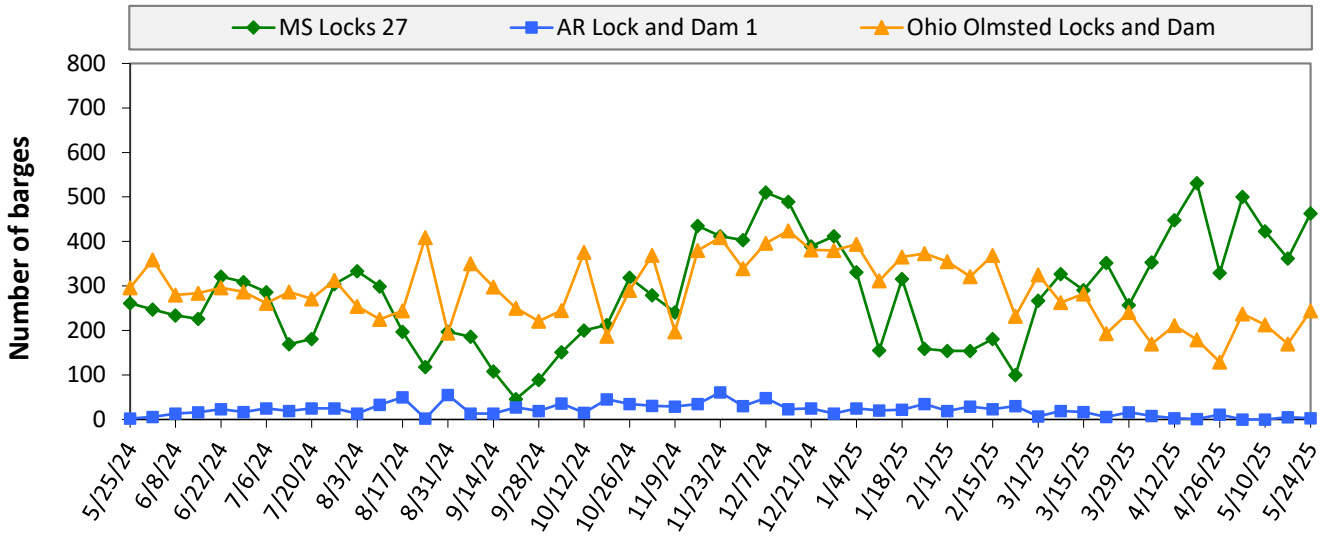
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 05/24/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	127	0	37	0	164
Mississippi River (Winfield, MO (L25))	274	2	79	0	354
Mississippi River (Alton, IL (L26))	414	2	109	0	524
Mississippi River (Granite City, IL (L27))	490	2	112	0	603
Illinois River (La Grange)	154	0	32	0	185
Ohio River (Olmsted)	72	2	18	0	92
Arkansas River (L1)	0	31	9	0	40
Weekly total - 2025	562	35	138	0	735
Weekly total - 2024	342	29	177	0	548
2025 YTD	7,769	425	4,376	94	12,665
2024 YTD	5,625	665	4,732	89	11,110
2025 as % of 2024 YTD	138	64	92	107	114
Last 4 weeks as % of 2024	151	136	127	155	145
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.

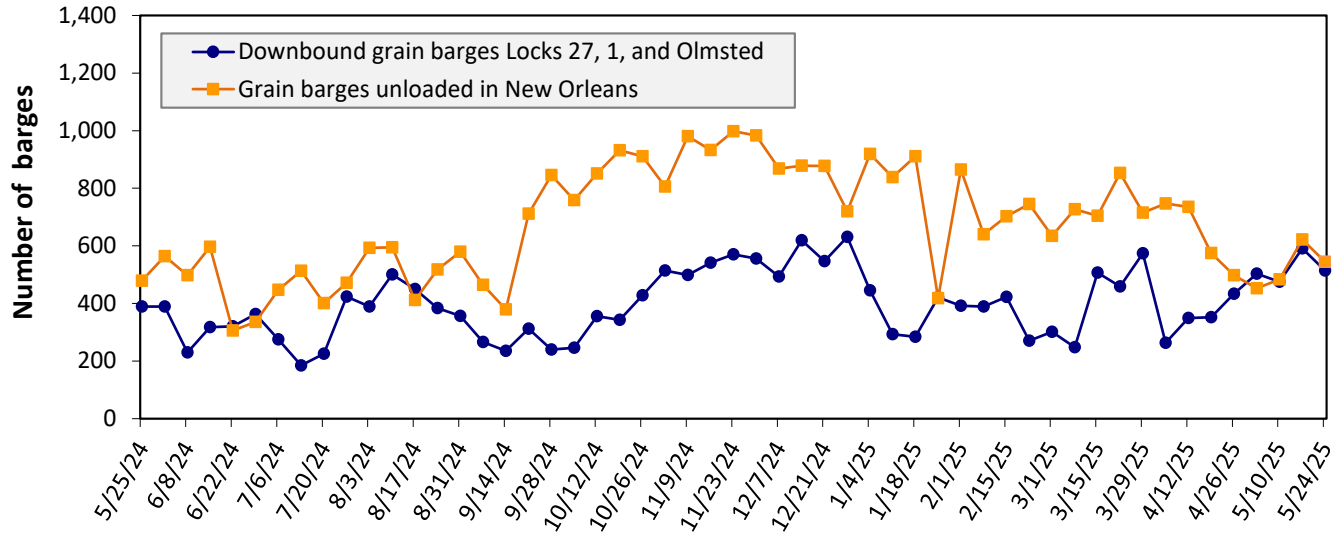
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending May 24: 710 barges transited the locks, 173 barges more than the previous week, and 18 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 24: 514 barges moved down river, 77 fewer than the previous week; 545 grain barges unloaded in the New Orleans Region, 12 percent fewer than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		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.

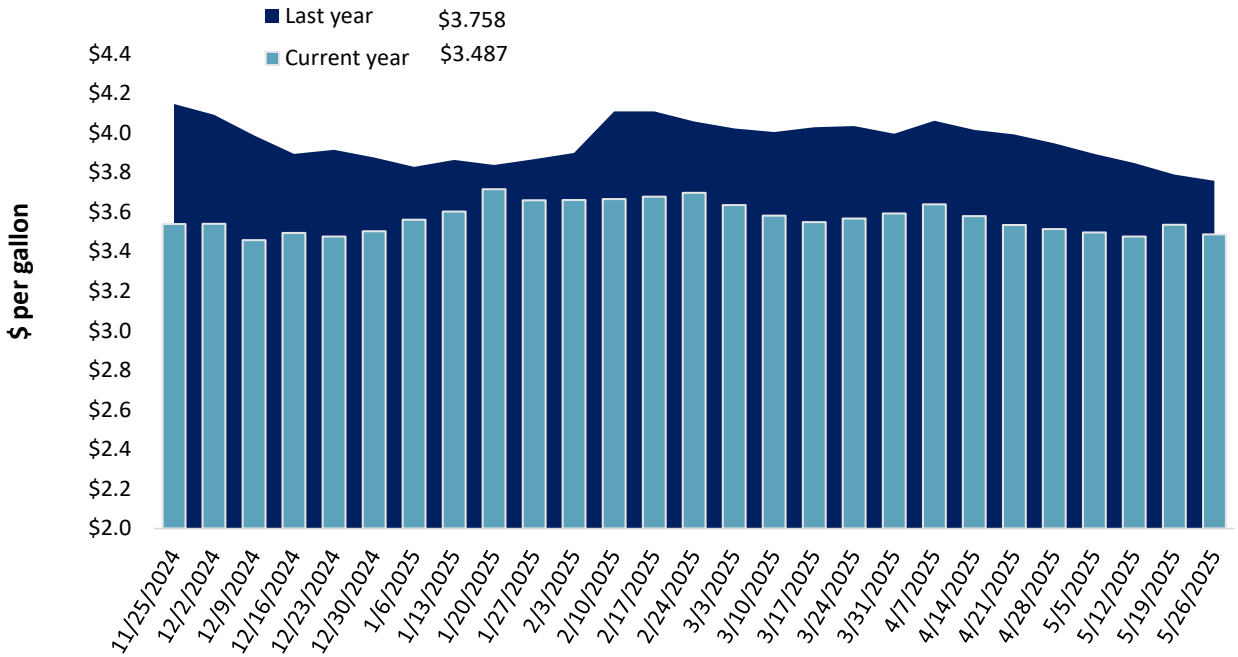
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 5/26/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.555	-0.025	-0.330
	New England	3.882	-0.015	-0.266
	Central Atlantic	3.801	0.013	-0.322
	Lower Atlantic	3.428	-0.041	-0.342
II	Midwest	3.428	-0.053	-0.205
III	Gulf Coast	3.136	-0.065	-0.342
IV	Rocky Mountain	3.445	-0.067	-0.261
V	West Coast	4.248	-0.048	-0.201
	West Coast less California	3.763	-0.065	-0.219
	California	4.808	-0.027	-0.177
Total	United States	3.487	-0.049	-0.271

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 26, the U.S. average diesel fuel price decreased 4.9 cents from the previous week to $3.487 per gallon, 27.1 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 5/15/2025	597	168	409	397	25	1,596	16,675	4,163	22,434
	This week year ago	250	225	442	272	27	1,216	12,433	3,500	17,148
	Last 4 wks. as % of same period 2023/24	314	103	133	210	95	181	136	119	136
Current shipped (cumulative) exports sales	2024/25 YTD	4,916	2,981	6,286	5,359	327	19,869	46,604	44,148	110,621
	2023/24 YTD	3,351	4,120	6,016	3,728	504	17,718	36,845	39,381	93,945
	YTD 2024/25 as % of 2023/24	147	72	104	144	65	112	126	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 5/15/2025	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	2157	20,902	20,117	4	17,746
Japan	514	11,009	9,000	22	9,366
China	0	33	2,538	-99	8,233
Colombia	100	6,460	5,119	26	4,383
Korea	0	5,177	2,167	139	1,565
Top 5 importers	2,771	43,581	38,940	12	41,293
Total U.S. corn export sales	2,972	63,279	49,277	28	51,170
% of YTD current month's export projection	4%	96%	85%	-	-
Change from prior week	218	1,191	911	-	-
Top 5 importers' share of U.S. corn export sales	93%	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 5/15/2025	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	23,842	-6	28,636
Mexico	205	4,848	4,582	6	4,917
Japan	63	1,827	1,966	-7	2,231
Egypt	0	2,945	1,080	173	2,228
Indonesia	0	1,668	1,808	-8	1,910
Top 5 importers	268	33,768	33,277	1	39,922
Total U.S. soybean export sales	1,023	48,311	42,882	13	51,302
% of YTD current month's export projection	2%	96%	93%	-	-
Change from prior week	15	308	279	-	-
Top 5 importers' share of U.S. soybean export sales	26%	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 5/15/2025	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	688	3,905	3,298	18	3,298
Philippines	437	2,653	2,855	-7	2,494
Japan	358	2,115	1,960	8	2,125
China	0	139	2,118	-93	1,374
Korea	221	2,419	1,385	75	1,274
Taiwan	150	1,016	1,105	-8	921
Nigeria	104	761	276	176	920
Thailand	0	950	462	106	552
Colombia	183	546	327	67	522
Vietnam	0	589	427	38	313
Top 10 importers	2140	15,093	14,210	6	13,792
Total U.S. wheat export sales	4,181	21,465	18,934	13	18,323
% of YTD current month's export projection	19%	96%	98%	-	-
Change from prior week	882	-13	18	-	-
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.

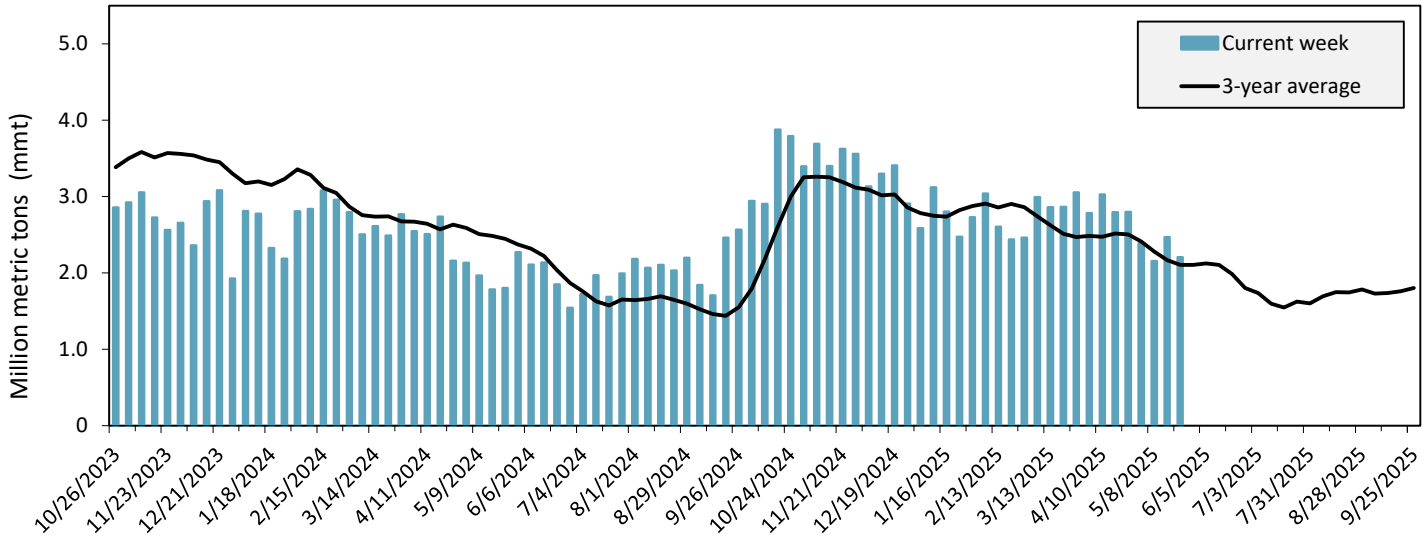
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 05/22/2025	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	448	517	87	10,433	7,672	136	144	147	13,987
	Soybeans	0	0	n/a	1,966	2,502	79	155	63	10,445
	Wheat	265	215	123	4,437	4,209	105	146	165	11,453
	All grain	712	737	97	16,931	15,325	110	130	131	37,186
Mississippi Gulf	Corn	686	922	74	14,953	10,214	146	136	102	27,407
	Soybeans	69	110	63	9,473	10,405	91	81	66	29,741
	Wheat	111	64	175	1,425	2,338	61	66	82	4,523
	All grain	867	1,096	79	25,851	23,011	112	115	92	61,789
Texas Gulf	Corn	11	0	n/a	116	226	51	22	22	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	132	61	216	1,403	604	232	759	176	1,940
	All grain	174	61	284	1,740	2,526	69	121	73	6,965
Interior	Corn	250	315	80	5,192	5,392	96	113	140	13,463
	Soybeans	121	113	106	2,676	2,975	90	125	128	8,059
	Wheat	48	81	59	1,191	1,096	109	120	137	2,952
	All grain	439	556	79	9,288	9,575	97	123	142	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	0	10	0	93	123	76	83	86	653
	All grain	0	10	0	93	141	66	46	23	1,060
Atlantic	Corn	1	7	10	149	163	91	188	206	410
	Soybeans	5	2	292	444	426	104	214	18	1,272
	Wheat	7	0	n/a	34	10	323	n/a	364	73
	All grain	13	9	142	626	599	104	229	48	1,754
All Regions	Corn	1,396	1,760	79	30,842	23,668	130	132	121	56,109
	Soybeans	195	225	86	14,768	16,380	90	98	77	50,865
	Wheat	562	431	130	8,582	8,379	102	137	141	21,594
	All grain	2,205	2,469	89	54,632	51,231	107	122	109	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.

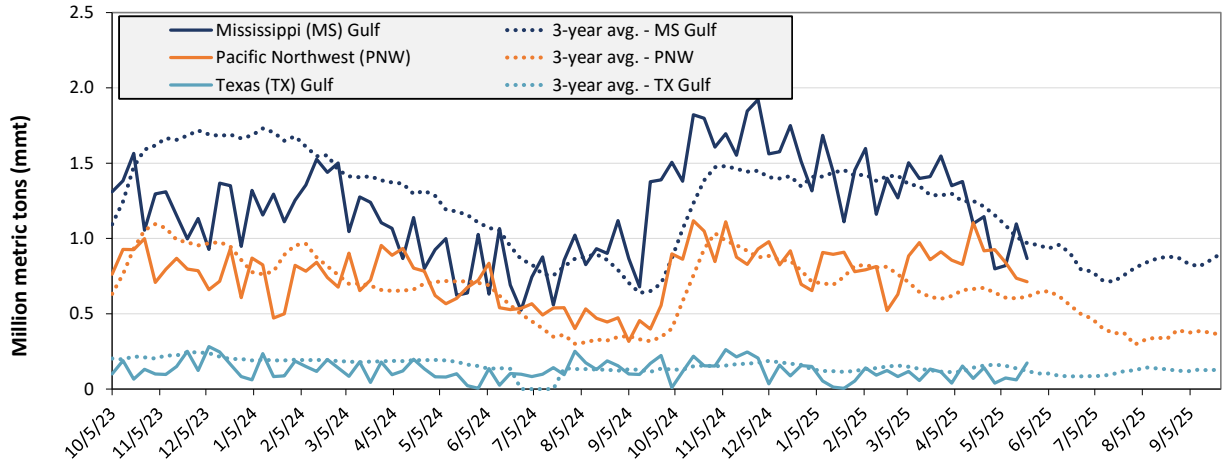
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending May. 22: 2.2 mmt of grain inspected, down 11 percent from the previous week, up 24 percent from the same week last year, and up 5 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 05/22/25 inspections (mmt):
MS Gulf: 0.87
PNW: 0.71
TX Gulf: 0.17

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 21	up 184	down 10	down 3
Last year (same 7 days)	up 33	up 216	up 47	up 8
3-year average (4-week moving average)	down 11	up 45	down 4	up 16

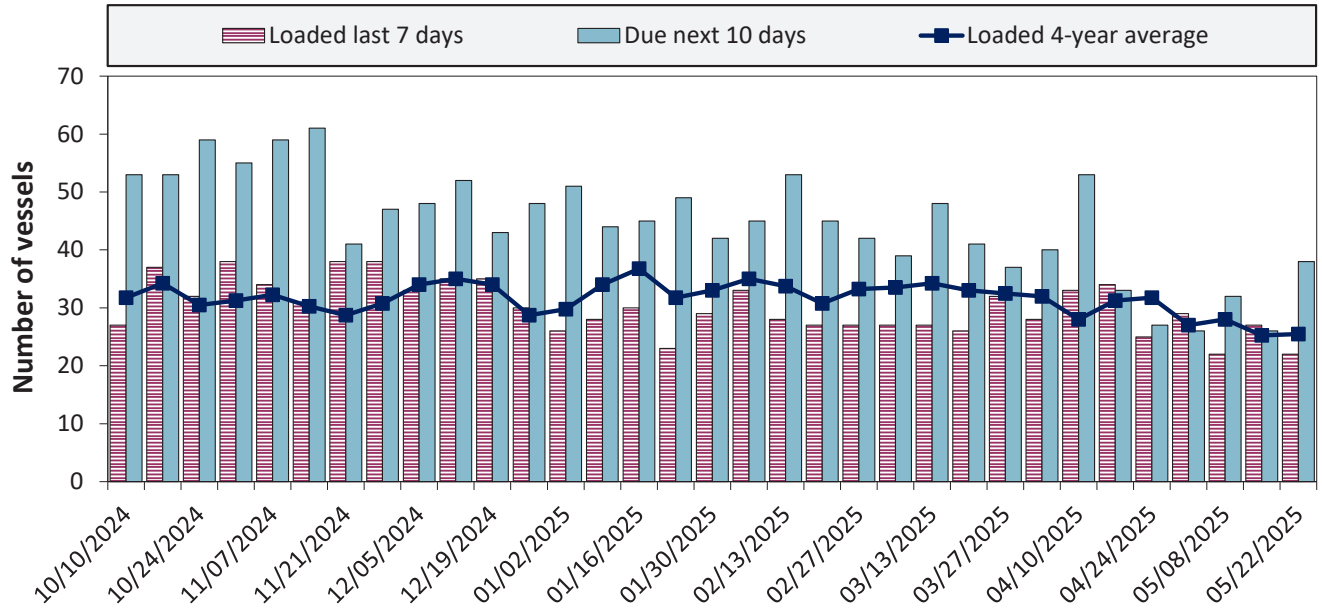
Source: USDA, Federal Grain Inspection Service.

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
5/22/2025	22	22	38	14
5/15/2025	20	27	26	14
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.

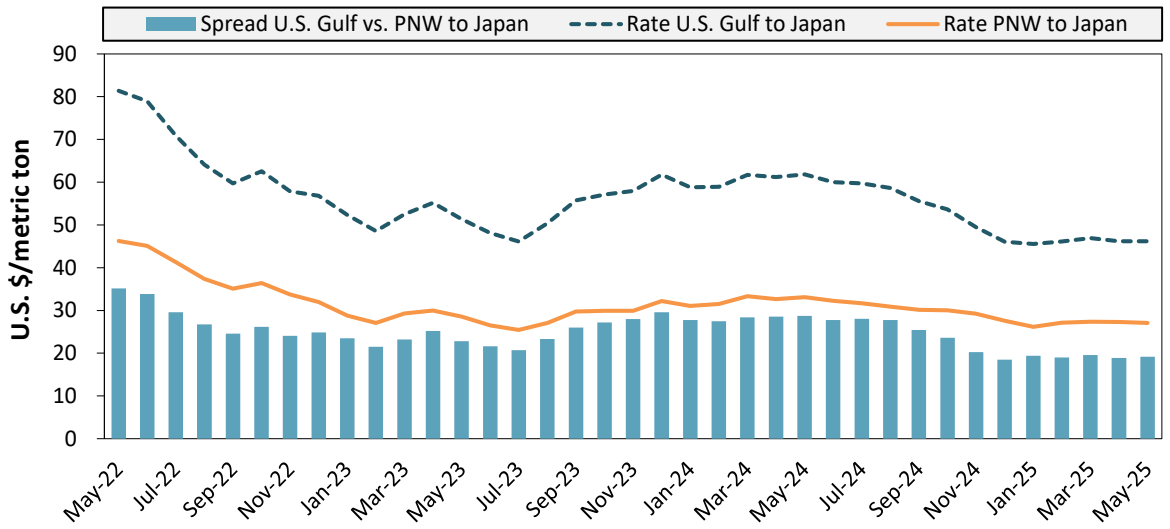
Figure 19. U.S. Gulf vessel loading activity



Week ending 05/22/25, number of vessels	Loaded	Due
Change from last year	16%	19%
Change from 4-year average	-14%	8%

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
May 2025	$46.20	$27.05	$19.15
Change from May 2024	-25%	-18%	-33%
Change from 4-year average	-29%	-26%	-33%

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

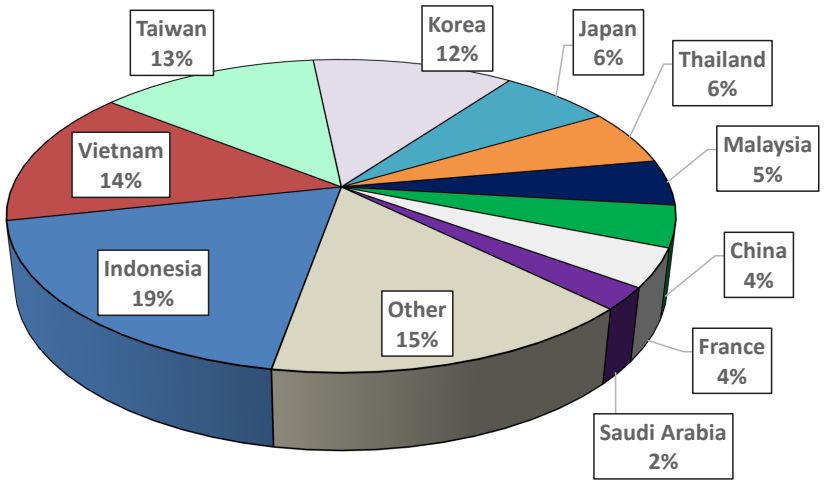
Table 20. Ocean freight rates for selected shipments, week ending 5/24/2025

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	Morocco	Soybeans	May 23, 2025	Jun 5/15, 2025	46,000	42.38
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	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	S. Korea	Corn	May 21, 2025	May 24, 2025	66,000	36.85
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	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.

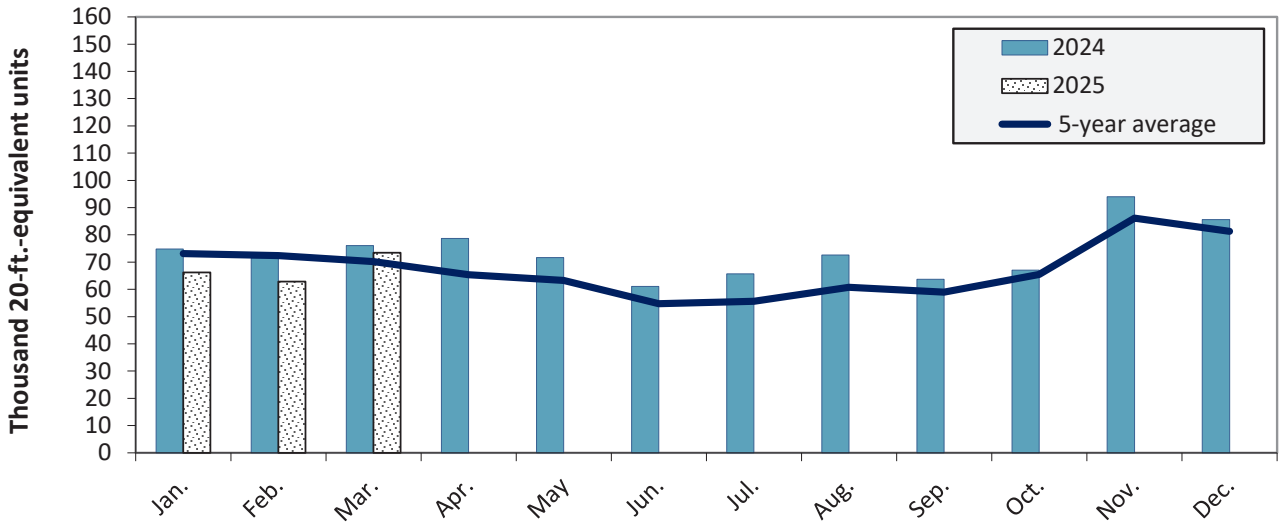
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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