



Grain Transportation Report

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June 12, 2025

A weekly publication of the Agricultural Marketing Service

www.ams.usda.gov/GTR

UP Works To Move Interchange Practice to Eagle Pass, TX. On May 23, [Union Pacific Railroad \(UP\) announced](#) an effort with Ferromex—Mexico’s largest railroad—and the U.S. Customs and Border Patrol to shift cross-border crew changes to UP’s yard in Eagle Pass, TX (see [Trains](#) for expanded industry insight). At the current crew-change site—UP’s single-track bridge (over the Rio Grande River)—the process often takes 30 to 40 minutes to complete. UP believes moving the interchange location will make the process more efficient, safe, and secure.

UP’s interchange announcement comes as the [Surface Transportation Board](#) considers a proposal for a new short line railroad at the Eagle Pass border crossing ([GTR, December 21, 2023, second highlight](#)).

Mexico is a top buyer of U.S. grains and oilseeds. About two-thirds of U.S. grain and oilseed exports to Mexico travel by rail, and about one-third travel by ocean vessel. Three Texas border crossings handle the bulk of overland grain and oilseed exports to Mexico: Laredo, Eagle Pass, and El Paso. Eagle Pass is the top rail gateway for U.S. soybean exports to Mexico.

CHS Completes Upgrades to Myrtle Grove, LA, Export Terminal. Last month, CHS Inc. [completed a major renovation and expansion](#) of its Myrtle Grove, LA, export terminal, located 25 miles south of New Orleans, LA. According to CHS, the upgrades include six additional concrete silos, a new bulk weighing and grading system, a new dock and barge unloading system, and an electric-powered crane (the first in the United States dedicated exclusively to grain exports).

CHS projects these enhancements will allow the Myrtle Grove terminal to move 30 percent more bushels of grain. Located at the mouth of the Mississippi River, the Myrtle Grove terminal is able to receive grain, by barge, from CHS’s nine river terminals—located on the Mississippi and Illinois Rivers.

In 2024, 61.8 million metric tons of grain were inspected for export at the Mississippi Gulf—46 percent of total U.S. grain exports that year ([GTR table 18](#)).

ADM Nears Completion of St. Louis Facility Expansion. As reported in [AgWeb](#), Archer-Daniels-Midland Company (ADM) is nearing completion of a project that will double the capacity of ADM’s rail and barge systems in St. Louis, MO. A critical nexus for grain transportation, St. Louis connects all six Class I railroads and provides barge access to the Mississippi River. According to ADM, its St. Louis facility is the only one in the area that can load shuttle trains (for domestic feed markets) in addition to loading barges (for export terminals).

This flexibility makes the facility more efficient and more competitive, potentially resulting in above-average grain prices for farmers.

ADM’s St. Louis facility has already completed its barge expansion, which has doubled one of the loading belts from 30,000 bushels per hour to 60,000 bushels per hour. ADM is now working to upgrade its outbound rail system, allowing the facility to load a shuttle train in 12 hours instead of 20 hours, as previously done. This project is expected to be completed in 6 weeks.



Manuel Velez / Wikimedia Commons / Public Domain

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 29, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2024/25 totaled 19.65 million metric tons (mmt), down 7 percent from last week and up 27 percent from the same time last year.

Net [corn export sales](#) for MY 2024/25 were 0.94 mmt, up 3 percent from last week. Net [soybean export sales](#) were 0.19 mmt, up 33 percent from last week. Net [wheat export sales](#) for MY 2024/25 were -0.05 mmt, up 62 percent from last week.

Rail

U.S. Class I railroads originated 24,019 [grain carloads](#) during the week ending May 31. This was a 1-percent decrease from the previous week, 9 percent more than last year, and 8 percent more than the 3-year average.

Average June [shuttle secondary railcar bids/offers](#) (per car) were \$54 below tariff for the week ending June 5. This was \$30 more than last week and \$1 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$25 below tariff. This was \$6 less than last week and \$75 lower than this week last year.

Barge

For the week ending June 7, [barged grain movements](#) totaled 725,950 tons. This was 16 percent less than the previous week and 98 percent more than the same period last year.

For the week ending June 7, 462 grain barges [moved down river](#)—87 fewer than last week. There were 672 grain barges [unloaded](#) in the New Orleans region, 12 percent fewer than last week.

Ocean

For the week ending June 5, 32 [oceangoing grain vessels](#) were loaded in the Gulf—39 percent more than the same period last year. Within the next 10 days (starting June 6), 44 vessels were expected to be loaded—33 percent more than the same period last year.

As of June 5, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$45.75, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$26.50 per mt, down 1 percent from the previous week.

Fuel

For the week ending June 9, the U.S. average [diesel price](#) increased 2.0 cents from the previous week, to \$3.471 per gallon—18.7 cents below the same week last year.



Ethanol Update: Production, Transportation, and Exports

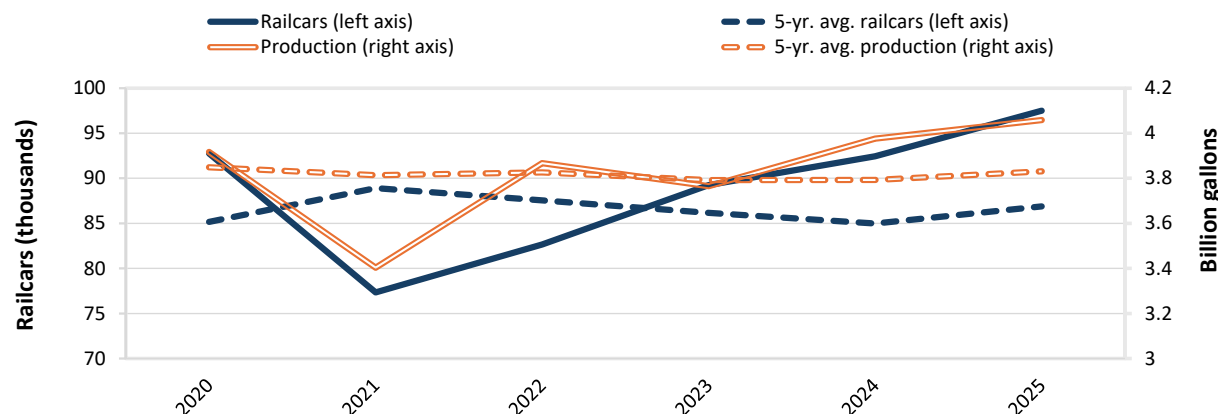
As of March 31, year-to-date (YTD) U.S. ethanol production was up 2 percent, and rail shipments were up 3 percent—compared to the same period in 2024. As of April 30, YTD ethanol exports were also up 6 percent from the same time last year, because of strong purchases from key countries.¹

This article examines ethanol production through first quarter 2025 and exports through early in the second quarter—and also takes a look at projections for future ethanol production and exports. For all time periods, the article considers the effects of production and exports on demand (or potential demand) for ethanol transportation.²

Ethanol Production and Rail Movements

Although YTD (through March 31), corn use for ethanol production was **down 1 percent** from the same time last year, YTD ethanol production was up 2 percent from the same time last year and up 7 percent from the prior 5-year average.³ With the rise in ethanol production, YTD **Class I ethanol rail movements** were up 5 percent from the same time last year and up 12 percent from the 5-year average (fig. 1).

Figure 1. Ethanol rail shipments and production, January to March



Note: avg. = average.

Source: Energy Information Administration.

Of the total YTD ethanol production, 71 percent shipped by rail out of the Midwest. By barge and tanker, transport of ethanol is limited to pickup and delivery from ports located along coastal and navigable inland waterways. Trucks are generally limited to distances of a few hundred miles, and they are primarily reserved for the last leg of the delivery route.

Of Midwest-originated rail movements of fuel ethanol, 41 percent went to the East Coast district; 29 percent, to the Gulf Coast district; 19 percent, to the West Coast district; 2 percent,

to the Rocky Mountains district; 4 percent, to Canada; and 5 percent, to elsewhere in the Midwest district.⁴

Notably, YTD ethanol rail shipments were up 12 percent to the Gulf Coast district and up 17 percent to the West Coast district—compared to the same time last year. These increases are consistent with a rise in exports—for example, ethanol exports out of Houston, TX, increased 11 percent year to year. Ethanol is railed to the Gulf Coast ports before being transferred to an ocean vessel.

1 Data for ethanol production and rail movements (from the Energy Information Administration) are available through March, and data for ethanol exports (from USDA's Foreign Agricultural Service) are available through April. Thus, this article refers to two slightly different YTD periods.

2 "Ethanol transportation" refers to transportation used to convey ethanol—not transportation powered by ethanol.

3 Growing use of sorghum for ethanol production (which has been trading at a discount compared to corn) has resulted in a flattening of corn use for ethanol.

4 More technically, EIA's geographic designations are called Petroleum Administration for Defense Districts or PADDs.

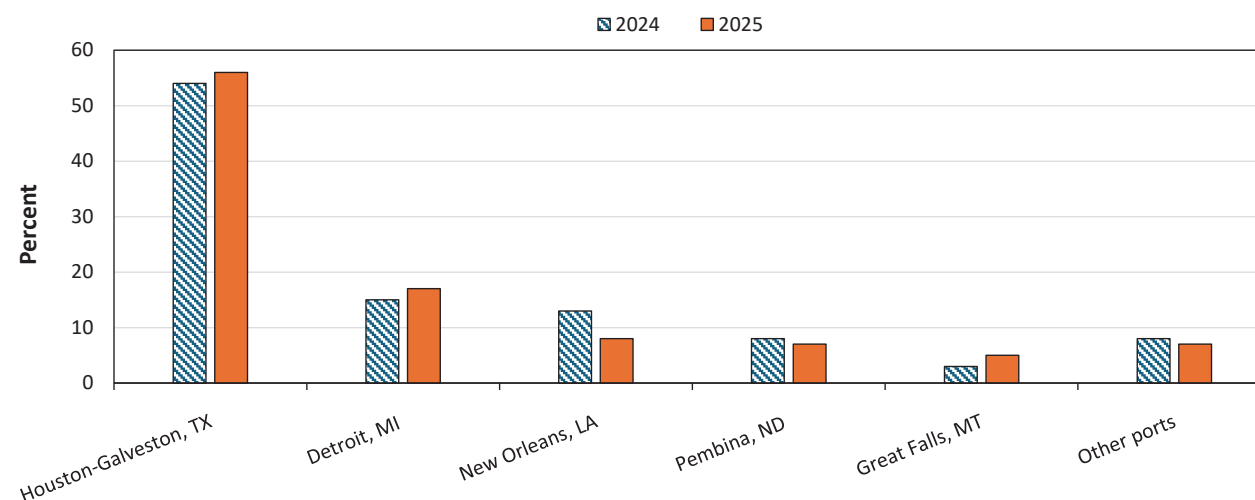
Intending to help lower fuel prices, the U.S. Environmental Protection Agency (EPA) has issued [a couple of emergency waivers](#) (effective May 1) that reduce restrictions on sales of E10 and E15 ethanol/gasoline blends. However, the waivers' effect on demand for ethanol and ethanol transportation may be limited: in the U.S. market, ethanol-blend shipment volumes follow gasoline demand, which is projected to be flat in 2025.

Ethanol Exports

Export demand, [as a share of total demand](#) (exports plus domestic), grew to a record annual high of 12 percent in 2024. Exports have been 14 percent of total demand through the first 3 months of 2025. According to [Foreign Agricultural Service \(FAS\) data](#), YTD (through April) strong sales to key markets drove U.S. ethanol exports up 6 percent from the same time last year and up 29 percent from the 5-year average.

Top Five Buyers of U.S. Ethanol. YTD sales to the top five buyers (in descending order of purchases)—Canada, EU, India, the United Kingdom (UK), and Colombia—accounted for 73 percent of total U.S. ethanol exports. Compared to the same period last year, ethanol-export volumes to three of the top five buyers rose. The largest increases were to the EU (up 74 percent), followed by Canada (up 4 percent) and India (up 1 percent). At over 224 million gallons, YTD U.S. ethanol exports to Canada accounted for 32 percent of total U.S. ethanol exports. The EU's purchases were driven by the Netherlands, which accounted

Figure 2. Top ports for U.S. ethanol exports, January to April



Source: USDA, Foreign Agricultural Service.

for 81 percent of EU's imports. Year to date, the Netherlands accounts for 12 percent of the U.S. ethanol exports—up from just 4 percent at the same time last year.

Exports were down 28 percent to the UK year to year, but up 75 percent from the 5-year average. The UK's decline allowed the EU to displace the UK from the position of second-largest buyer. U.S. ethanol exports to Colombia were down 11 percent, but up 91 percent from the 5-year average. Colombia maintained its place as the fifth-largest buyer.

Ethanol Blending Mandates and U.S.-UK Trade Deal. Strong U.S. ethanol purchases by Canada, the UK, EU, and Colombia are supported by ethanol-blending mandates in those countries. In Canada, the blending policies are both federal and provincial: several

provinces require higher rates than the national blending mandate of 5 percent ethanol in gasoline. Ontario's mandate will rise to [11 percent](#) in 2025—on the way toward its goal of reaching E15 by 2030.

UK purchases may gain further momentum from a new U.S.-UK trade deal, announced May 8. The deal eliminates the UK's 19-percent import tariff on U.S. ethanol through an annual 370-million-gallon import quota that incentivizes increased exports to the UK. If the quota is met, the UK's 2025 purchases will far exceed the 244 million gallons of U.S. ethanol purchased in 2024. Such a rise in ethanol exports to the UK could significantly increase rail movements from the Midwest to the Gulf region, as well as port activity at the Port of Houston, the main gateway for ethanol exports to the UK.

Port of Houston Remains Top Port of

Exit. U.S. port activity reflects the shifting dynamics of the top destinations for U.S. ethanol. As the top port of exit for U.S. ethanol exports, the Port of Houston handled 56 percent by volume YTD (through May)—up 2 percent from the same time last year, because of rising exports to India, the UK, and Colombia ([fig. 2](#)). YTD export shares rose for all ports, except New Orleans and Pembina and “other ports.”

The Port of Houston’s share rose mainly because of strong purchases by the Netherlands, while the Port of Detroit’s share was boosted by strong purchases by Canada. The Port of New Orleans’s share fell 5 percent because of decreased exports to the UK. Similarly, the Port of Pembina’s share declined with reduced shipments to Canada from this port (despite the overall rise in ethanol exports to Canada). The 1-percent decline in exports from “other ports” owed to a drop in the Port of Seattle’s share, because of that port’s decreased exports to Canada.

Looking Ahead

Ethanol Production in 2025 and 2026.

According to the U.S. Energy Information Administration’s (EIA) June [Short Term Energy Outlook](#), U.S. consumption of fuel ethanol blended into motor gasoline will average 930,000 barrels per day in 2025, unchanged from 2024. In 2026, U.S. consumption is projected to fall to 920,000 barrels per day.⁵

EIA projects ethanol production will average 1.06 million barrels per day in 2025 (unchanged from 2024) and 1.05 million barrels per day in 2026. According to USDA’s May [World Agricultural Supply and Demand Estimates report](#), from marketing year (MY) 2024/25 to MY 2025/26, corn use for ethanol is projected to remain the same.

Ethanol Exports for Fiscal Year (FY) 2025.

U.S. ethanol exports are expected to reach a record-high [\\$4.3 billion](#) in FY 2025, adjusted up from the [February outlook](#) of \$4.2 billion. If realized, the FY 2025 projection would be up 3 percent from the FY 2024 total of \$4.17 billion.

For FY 2025, ethanol exports are projected to be slightly higher than in FY 2024 for the top five buyers: Canada, the EU, India, the UK, and Colombia. The projected increases in Canada, EU, UK, and Colombia are driven by national mandates to blend fuel ethanol with gasoline. India’s projected increase is driven by non-fuel applications of ethanol, as the country’s domestic ethanol is increasingly diverted to the fuel market.

Strong purchases from the top five (and other) buyers of U.S. ethanol could boost export transportation demand, particularly for rail.

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⁵ According to EIA, gasoline consumption is expected to decrease in 2026 due to increased automobile efficiency and reduced employment growth.

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.

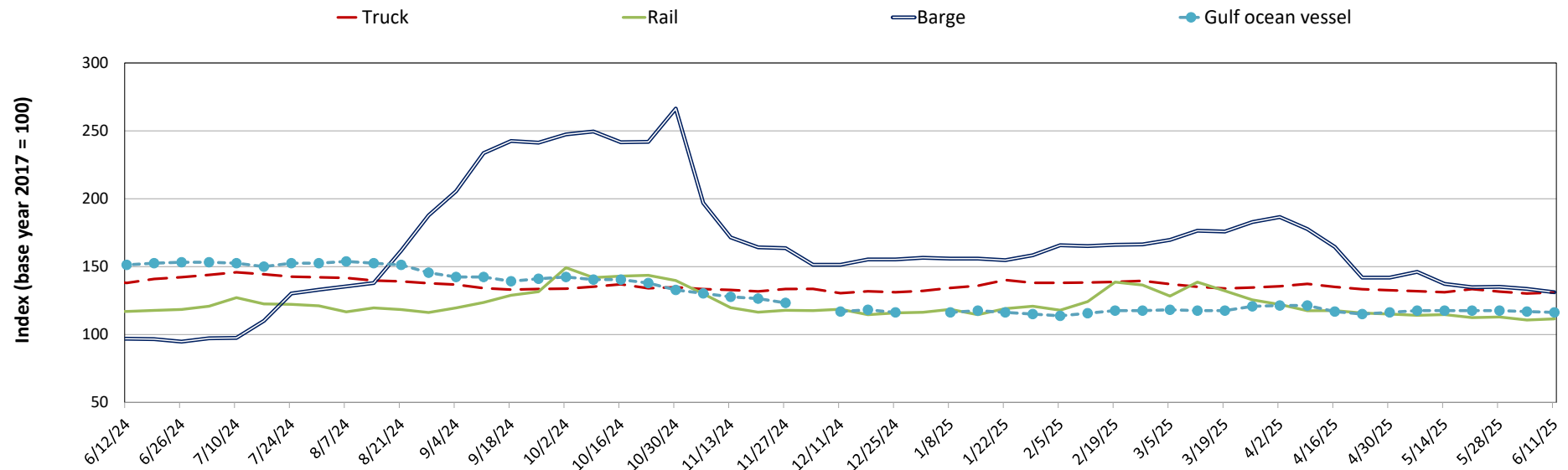
Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
06/11/25	131	112	131	116	126
06/04/25	130	111	134	117	127
06/12/24	138	117	97	151	152

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.

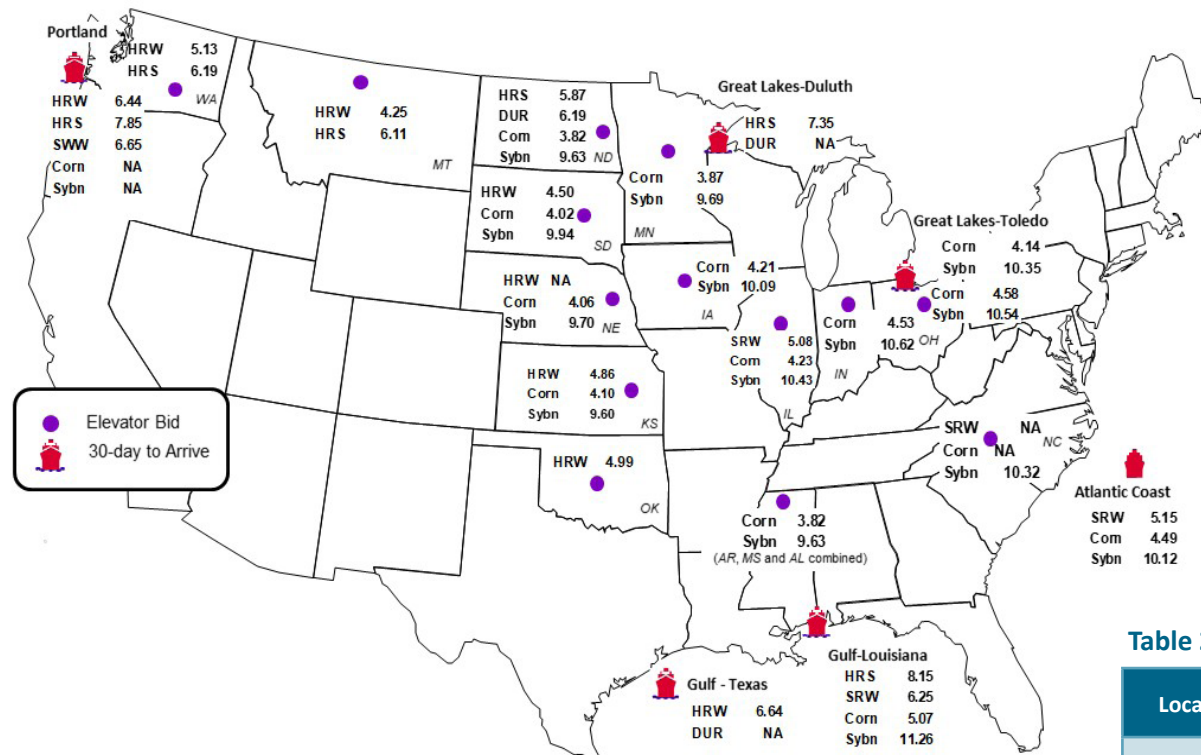
Figure 1. Grain transportation cost indicators as of week ending 6/11/25



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	6/6/2025	5/30/2025
Corn	IL-Gulf	-0.84	-0.89
Corn	NE-Gulf	-1.01	-1.08
Soybean	IA-Gulf	-1.17	-1.09
HRW	KS-Gulf	-1.78	-1.90
HRS	ND-Portland	-1.98	-2.12

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	6/6/2025	Week ago 5/30/2025	Year ago 6/7/2024
Kansas City	Wheat	July	5.424	5.334	6.462
Minneapolis	Wheat	July	6.352	6.254	6.944
Chicago	Wheat	July	5.454	5.340	6.122
Chicago	Corn	July	4.394	4.440	4.496
Chicago	Soybean	July	10.518	10.416	11.826

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.

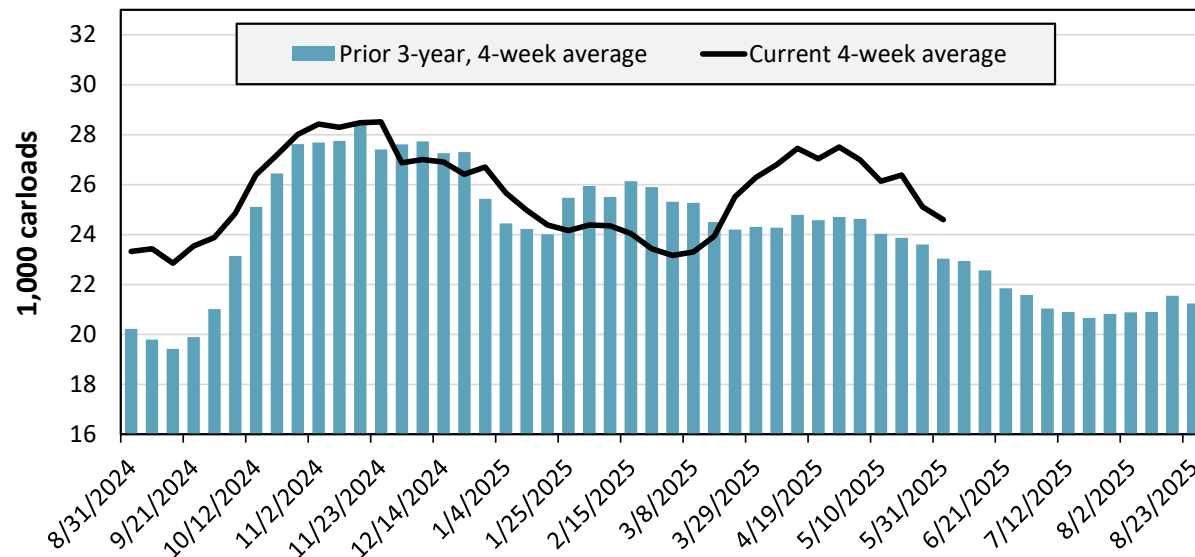
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 5/31/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,351	3,096	9,896	5,575	2,759	1,342	24,019
This week last year	1,373	2,172	10,770	4,734	2,417	617	22,083
2025 YTD	36,365	63,376	240,267	126,785	57,089	30,376	554,258
2024 YTD	36,532	58,142	235,360	115,645	61,836	20,834	528,349
2025 YTD as % of 2024 YTD	100	109	102	110	92	146	105
Last 4 weeks as % of 2024	105	117	103	114	123	172	112
Last 4 weeks as % of 3-yr. avg.	96	111	103	114	118	96	107
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 31, grain carloads were down 2 percent from the previous week, up 12 percent from last year, and up 7 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: 5/30/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	14.6	27.4	14.9	11.6	6.4	18.0	15.5
	Average over last 4 weeks	26.6	30.2	19.0	15.6	6.8	n/a	19.6
	Average of same 4 weeks last year	26.4	41.6	17.0	17.3	7.6	n/a	22.0
Average grain unit train speeds (miles per hour)	This week	22.9	18.9	26.6	23.2	25.7	18.7	22.7
	Average over last 4 weeks	21.5	19.4	25.6	22.9	24.7	n/a	22.8
	Average of same 4 weeks last year	23.0	18.6	24.9	23.1	24.7	n/a	22.9

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

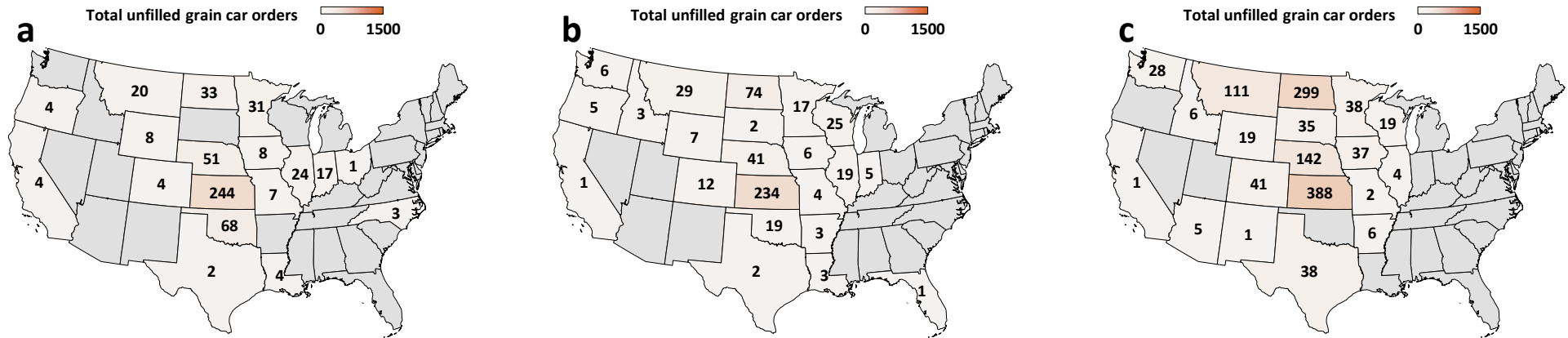
For the week ending: 5/30/2025		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	18	7	173	85	5	236	524
	Average over last 4 weeks	24	7	220	84	7	n/a	342
	Average of same 4 weeks last year	17	9	462	94	3	n/a	585
Average number of loaded grain cars not moved in over 48 hours	This week	45	180	358	47	4	307	940
	Average over last 4 weeks	37	179	327	66	3	n/a	612
	Average of same 4 weeks last year	25	288	808	96	5	n/a	1,221
Average number of grain unit trains held	This week	0	0	2	2	0	2	6
	Average over last 4 weeks	0	0	3	4	0	n/a	8
	Average of same 4 weeks last year	0	3	16	5	0	n/a	24
Total unfilled manifest grain car orders	This week	16	9	111	367	0	30	533
	Average over last 4 weeks	6	7	126	312	0	n/a	451
	Average of same 4 weeks last year	0	0	735	428	0	n/a	1,163

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](#).

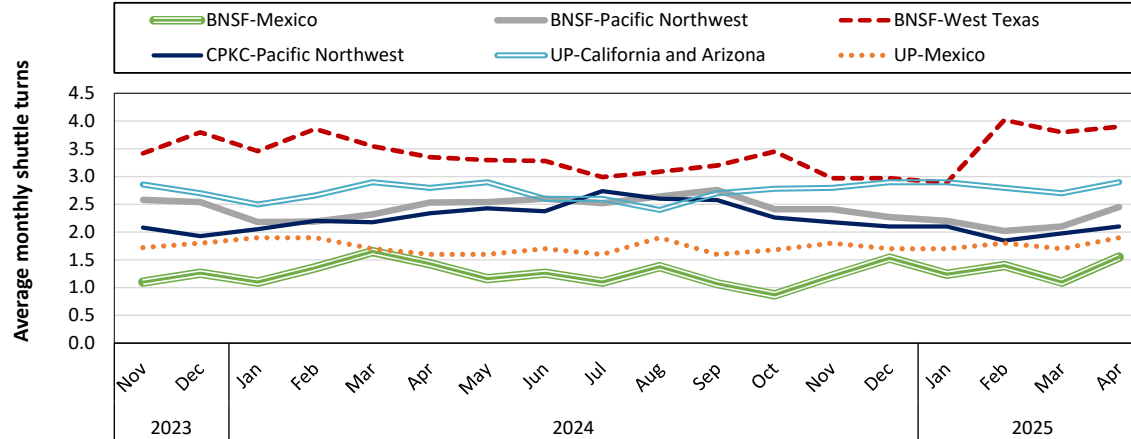
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 5/30/2025 (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 railroad and region



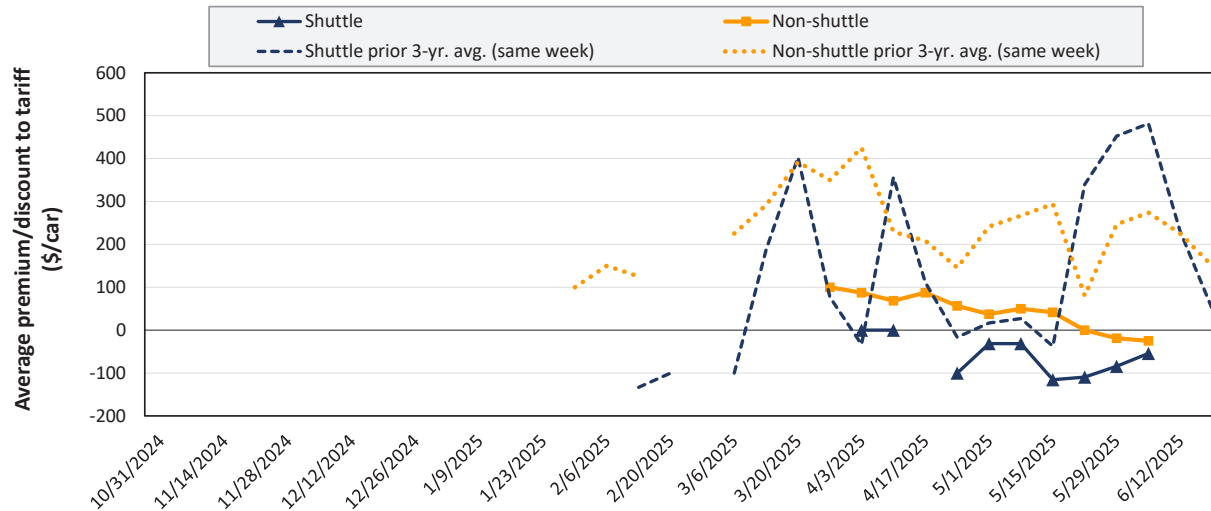
In April 2025, BNSF Railway's average monthly grain shuttle turns were 1.6 to Mexico, 2.5 to the Pacific Northwest, and 3.9 to West Texas. CPKC's shuttle turns averaged 2.1 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.9 to Mexico.

Note: A "shuttle turn" refers to the number of trips completed per month by a single train. Additional data (including additional regions and planned turns) are available on [AgTransport](https://www.agtransport.org/). BNSF=BNSF Railway; CPKC=Canadian Pacific Kansas City; UP=Union Pacific Railroad.

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 \$6 this week, and are \$125 below the peak.

Average shuttle bids/offers rose \$30 this week and are \$54 below the peak.

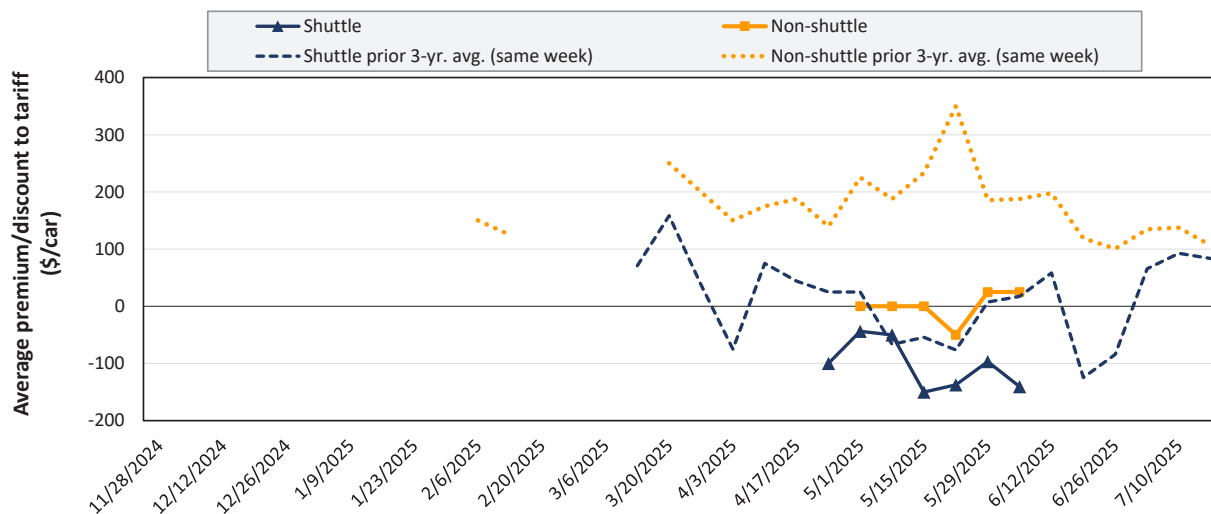
6/5/2025	BNSF	UP
Non-Shuttle	\$100	-\$150
Shuttle	\$108	-\$217

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 are unchanged this week, and are at the peak.

Average shuttle bids/offers fell \$44 this week and are \$97 below the peak.

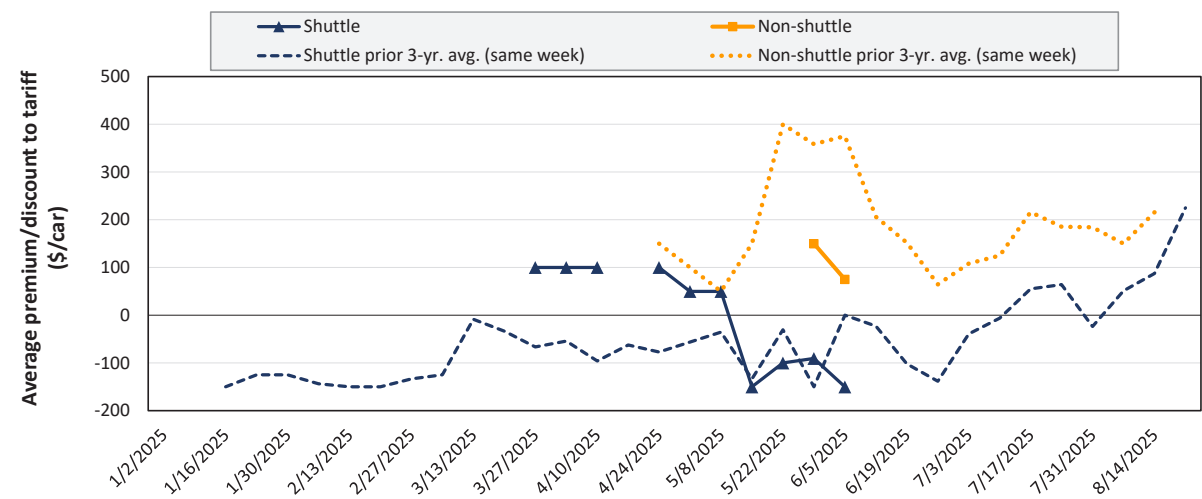
6/5/2025	BNSF	UP
Non-Shuttle	\$100	-\$50
Shuttle	-\$31	-\$250

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



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

Average shuttle bids/offers fell \$59 this week and are \$250 below the peak.

6/5/2025	BNSF	UP
Non-Shuttle	\$100	\$50
Shuttle	-\$75	-\$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.

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

For the week ending: 6/5/2025		Delivery period					
		Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25
Non-shuttle	BNSF	100	100	100	n/a	n/a	n/a
	Change from last week	12	-50	-50	n/a	n/a	n/a
	Change from same week 2024	-100	-50	-50	n/a	n/a	n/a
	UP	-150	-50	50	50	n/a	n/a
	Change from last week	-25	50	n/a	n/a	n/a	n/a
	Change from same week 2024	-50	-50	n/a	n/a	n/a	n/a
Shuttle	BNSF	108	-31	-75	-50	850	n/a
	Change from last week	77	13	16	n/a	0	n/a
	Change from same week 2024	15	-56	n/a	n/a	n/a	n/a
	UP	-217	-250	-225	n/a	n/a	n/a
	Change from last week	-17	-100	n/a	n/a	n/a	n/a
	Change from same week 2024	-17	-38	n/a	n/a	n/a	n/a
	CPKC	-100	-100	n/a	n/a	n/a	n/a
	Change from last week	0	0	n/a	n/a	n/a	n/a
	Change from same week 2024	0	-100	n/a	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, June 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	\$94.96	\$5,726.96	\$1.55	\$56.87	3.0
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,091	\$48.88	\$4,139.88	\$1.12	\$41.11	6.0
	CP	Westby, MT	St. Louis, MO	Unit	\$6,500	\$352.19	\$6,852.19	\$1.85	\$68.05	4.6
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$4,604	\$56.88	\$4,660.88	\$1.26	\$46.28	5.0
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,015	\$120.08	\$6,135.08	\$1.66	\$60.92	2.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$2,665	\$23.52	\$2,688.52	\$0.73	\$26.70	11.1
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,432	\$122.32	\$5,554.32	\$1.50	\$55.16	2.4
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,638	\$101.36	\$5,739.36	\$1.55	\$56.99	2.9
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,212	\$83.04	\$5,295.04	\$1.43	\$52.58	3.6
	CP	Minot, ND	Kalama, WA	Unit	\$5,498	\$372.59	\$5,870.59	\$1.59	\$58.30	3.4
	CP	Nekoma, ND	Chicago, IL	Manifest	\$4,830	\$223.93	\$5,053.93	\$1.37	\$50.19	4.9
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$51.04	\$3,451.04	\$0.93	\$34.27	-13.0
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,600	\$45.04	\$3,645.04	\$0.99	\$36.20	-15.3
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$152.00	\$5,952.00	\$1.61	\$59.11	-15.6
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,700	\$110.08	\$5,810.08	\$1.57	\$57.70	-3.0
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$68.72	\$4,268.72	\$1.15	\$42.39	-13.7
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$60.56	\$4,060.56	\$1.10	\$40.32	-14.5
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$69.12	\$3,569.12	\$0.96	\$35.44	-16.1
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$50.64	\$3,750.64	\$1.01	\$37.25	-13.5
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$51.04	\$3,951.04	\$1.07	\$39.24	-12.8
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$348.90	\$4,873.90	\$1.32	\$48.40	-9.4
	UP	Goodland, KS	Kansas City, MO	Manifest	\$4,967	\$130.50	\$5,097.50	\$1.38	\$50.62	1.0
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$172.20	\$3,947.20	\$1.07	\$39.20	-10.3
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$229.50	\$4,254.50	\$1.15	\$42.25	-9.9
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,591	\$61.76	\$4,652.76	\$1.26	\$46.20	4.8
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,239	\$60.64	\$4,299.64	\$1.16	\$42.70	5.3
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,032	\$26.64	\$2,058.64	\$0.56	\$20.44	-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, June 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	\$85.28	\$5,885.28	\$1.48	\$58.44	3.2
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$134.72	\$5,604.72	\$1.41	\$55.66	-5.6
	BNSF	Edison, NE	Hanford, CA	Railroad	\$6,000	\$142.08	\$6,142.08	\$1.55	\$60.99	1.7
	BNSF	Edison, NE	Hereford, TX	Railroad	\$5,040	\$58.24	\$5,098.24	\$1.29	\$50.63	4.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$140.72	\$5,490.72	\$1.39	\$54.53	-5.9
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,560	\$74.80	\$4,634.80	\$1.17	\$46.03	4.4
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,800	\$61.12	\$4,861.12	\$1.23	\$48.27	4.6
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,540	\$74.96	\$4,614.96	\$1.16	\$45.83	4.5
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$113.52	\$5,543.52	\$1.40	\$55.05	-5.2
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$133.28	\$5,563.28	\$1.40	\$55.25	-5.7
	CN	Gibson City, IL	Reserve, LA	Private	\$2,081	\$287.97	\$2,368.97	\$0.60	\$23.53	5.3
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,461	\$287.97	\$2,748.97	\$0.69	\$27.30	4.5
	CP	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$428.51	\$5,475.51	\$1.38	\$54.37	-4.7
	CP	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$412.34	\$5,925.34	\$1.49	\$58.84	0.6
	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	\$43.20	\$1,385.20	\$0.35	\$13.76	-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
Soybeans	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
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$122.24	\$6,257.24	\$1.69	\$62.14	-4.8
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$117.52	\$6,202.52	\$1.68	\$61.59	-4.8
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$68.40	\$3,468.40	\$0.94	\$34.44	-25.4
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$129.92	\$6,314.92	\$1.71	\$62.71	-4.9
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$6,235	\$133.28	\$6,368.28	\$1.72	\$63.24	-5.0
	CN	Gibson City, IL	Reserve, LA	Private	\$2,081	\$287.97	\$2,368.97	\$0.64	\$23.53	5.6
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,461	\$287.97	\$2,748.97	\$0.74	\$27.30	4.8
	CP	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$428.51	\$6,213.51	\$1.68	\$61.70	-4.2
	CP	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$327.51	\$3,853.51	\$1.04	\$38.27	-2.3
	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.

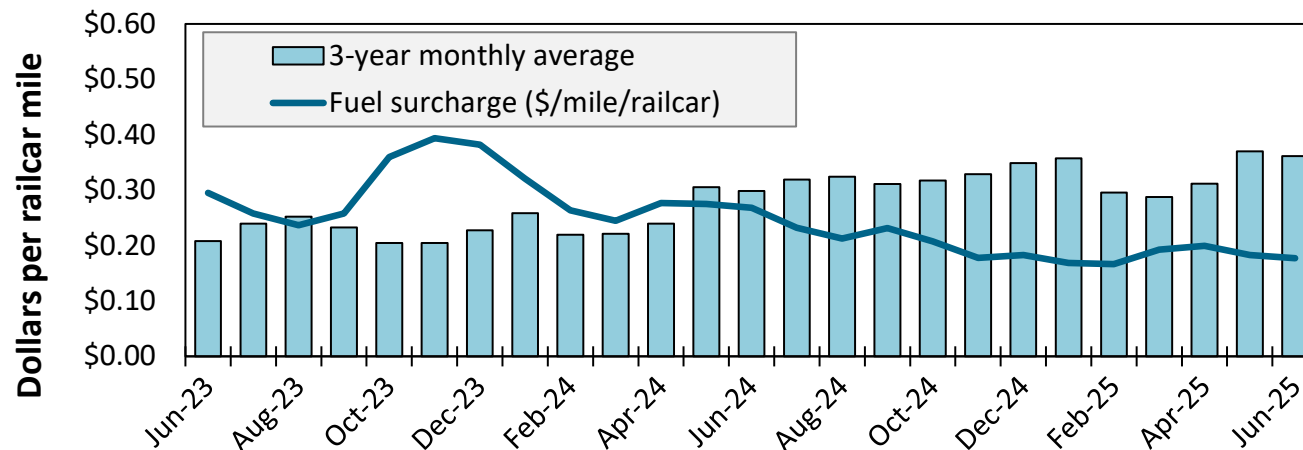
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, June 2025

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	\$4,663	\$45.89	\$1.17	-0.3	3.5
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,346	\$52.62	\$1.34	-0.2	-
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,466	\$53.80	\$1.37	-0.2	-
	Polo, IL	El Paso, TX	BNSF	Shuttle	\$4,672	\$45.98	\$1.17	-0.3	3.2
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	\$5,068	\$49.88	\$1.27	0.0	3.4
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	\$5,203	\$51.21	\$1.30	0.0	3.2
	Superior, NE	El Paso, TX	BNSF	Shuttle	\$5,081	\$50.01	\$1.27	-0.2	3.9
	Delhi, LA	Laredo, TX	CPKC	Non-shuttle	\$3,946	\$38.84	\$0.99	-0.2	-
Soybeans	Slater, MO	Laredo, TX	CPKC	Non-shuttle	\$5,329	\$52.45	\$1.33	-0.2	-
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	\$5,346	\$52.62	\$1.43	-0.2	-
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	\$6,615	\$65.11	\$1.77	0.0	2.7
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	\$5,466	\$53.80	\$1.46	-0.2	-
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	\$6,717	\$66.11	\$1.80	0.0	2.5
Wheat	Corder, MO	Laredo, TX	CPKC	Non-shuttle	\$5,319	\$52.35	\$1.42	-0.2	-
	FT Worth, TX	El Paso, TX	BNSF	DET	\$2,979	\$29.32	\$0.80	-25.2	-30.3
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	\$2,787	\$27.43	\$0.75	-21.8	-27.3
	Great Bend, KS	Laredo, TX	UP	Shuttle	\$4,373	\$43.04	\$1.17	-8.9	-10.4
	Wichita, KS	Laredo, TX	UP	Shuttle	\$4,265	\$41.98	\$1.14	-7.0	-8.4
	Pratt, KS	Eagle Pass, TX	UP	Shuttle	\$4,501	\$44.30	\$1.21	-4.3	-5.9

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



June 2025: \$0.18/mile, unchanged from last month's surcharge of \$0.18/mile; down 9 cents from the June 2024 surcharge of \$0.27/mile; and down 18 cents from the June prior 3-year average of \$0.36/mile.

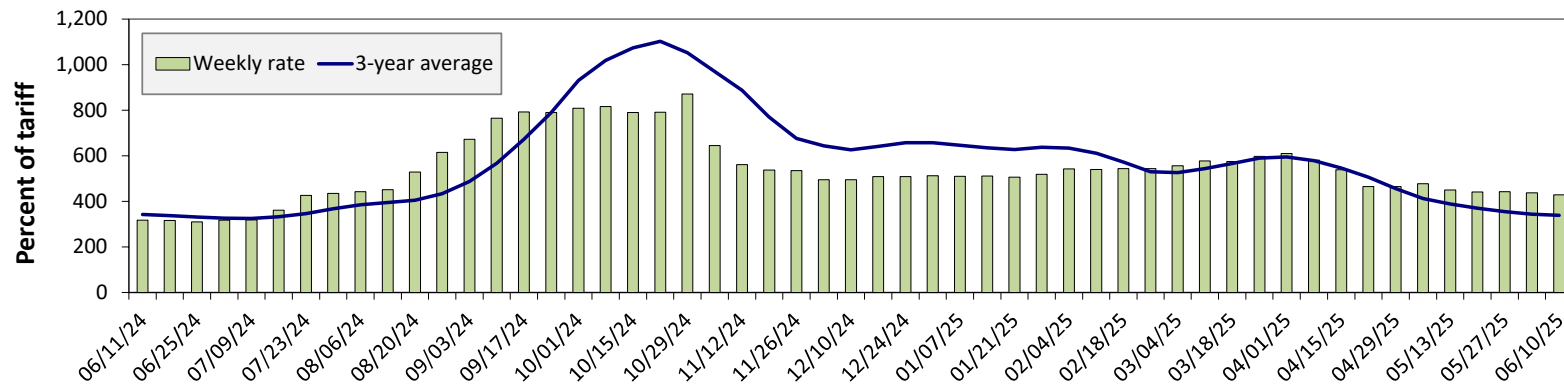
Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

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Figure 10. Illinois River barge freight rate



For the week ending June 10: 2 percent lower than the previous week; 35 percent higher than last year; and 27 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	6/10/2025	505	458	429	304	323	288
	6/3/2025	491	459	437	313	327	289
\$/ton	6/10/2025	31.26	24.37	19.91	12.13	15.15	9.04
	6/3/2025	30.39	24.42	20.28	12.49	15.34	9.07
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	35	37	30	42
	3-year avg.	17	23	27	22	8	19
Rate	July	494	436	413	299	317	290
	September	664	641	628	613	628	621

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](#).

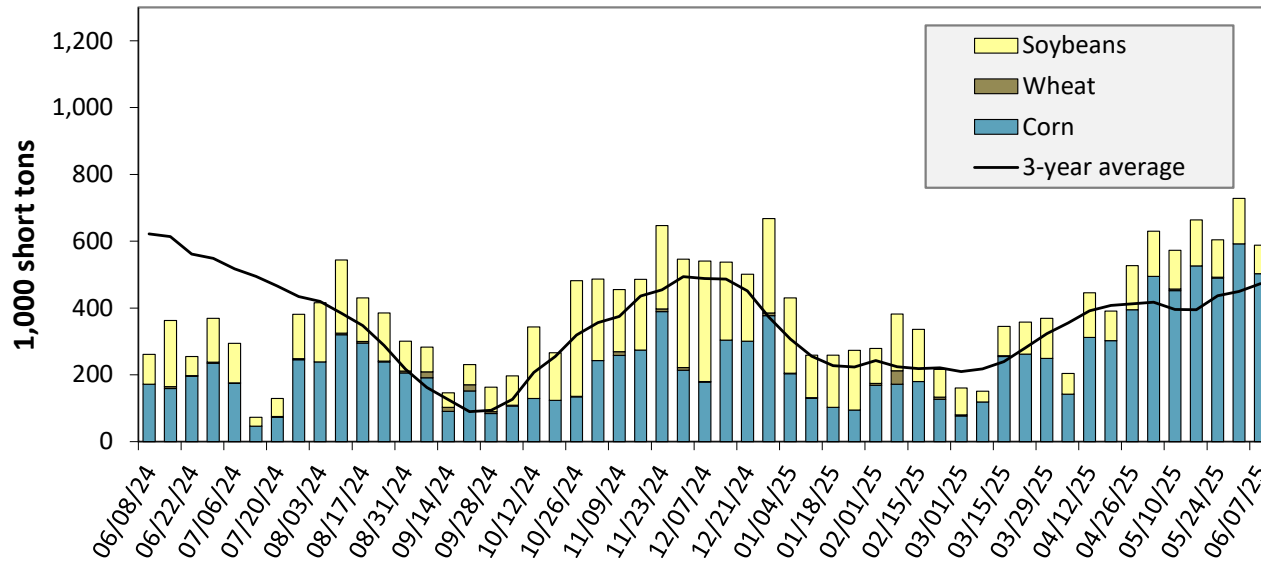
Source: USDA, Agricultural Marketing Service.

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 June 7: 125 percent higher than last year and 24 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.

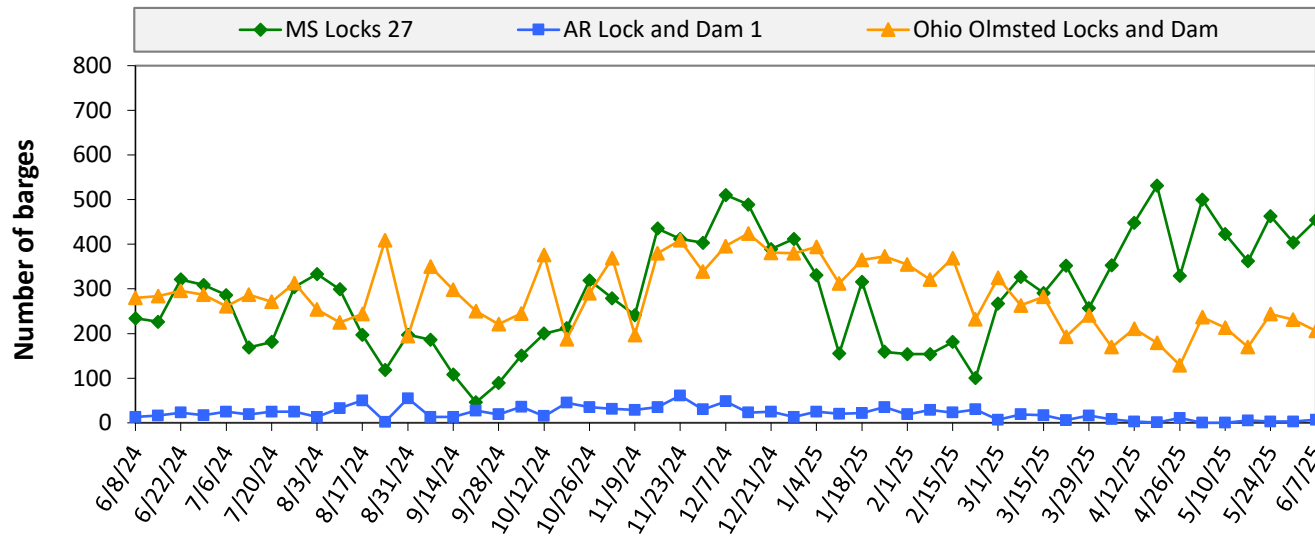
Table 10. Barged grain movements (1,000 tons)

For the week ending 06/07/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	157	0	36	5	198
Mississippi River (Winfield, MO (L25))	281	0	44	0	325
Mississippi River (Alton, IL (L26))	423	0	68	0	491
Mississippi River (Granite City, IL (L27))	503	0	85	0	588
Illinois River (La Grange)	102	0	24	0	125
Ohio River (Olmsted)	79	9	18	2	108
Arkansas River (L1)	0	27	3	0	29
Weekly total - 2025	583	36	106	2	726
Weekly total - 2024	245	2	119	0	366
2025 YTD	9,032	463	4,656	99	14,250
2024 YTD	6,276	678	5,037	89	12,080
2025 as % of 2024 YTD	144	68	92	112	118
Last 4 weeks as % of 2024	169	199	85	132	144
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.

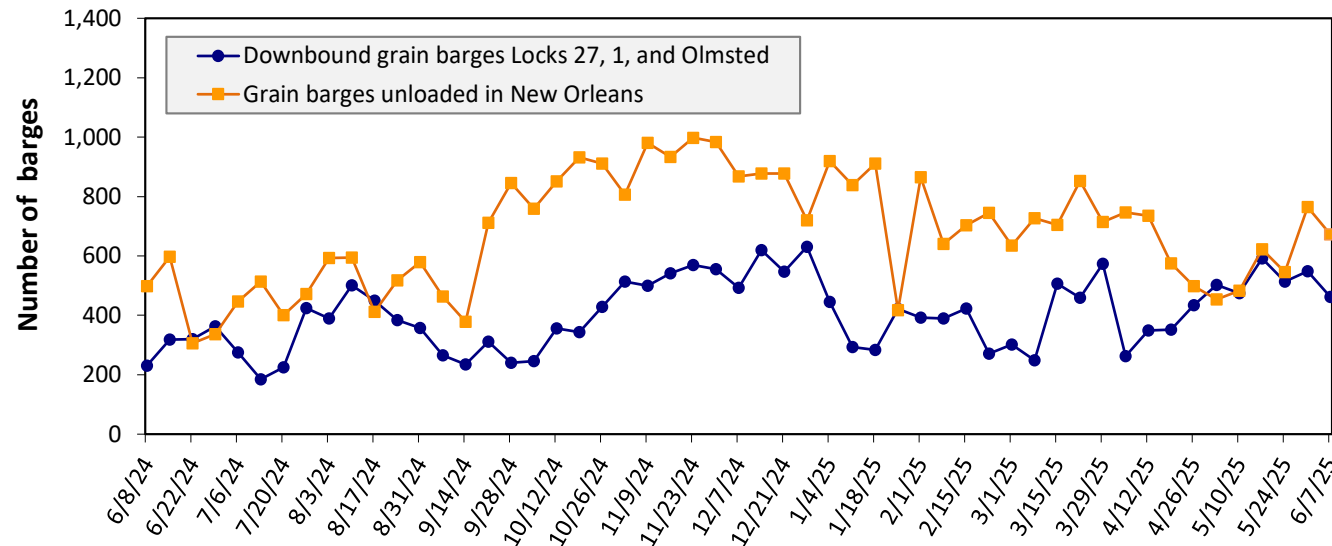
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending June 7: 667 barges transited the locks, 29 barges more than the previous week, and 30 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 June 7: 462 barges moved down river, 87 fewer than the previous week; 672 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	
		June 2025	May 2025	June 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$21.63	\$21.55	\$21.15	2.3	4.5
	Central Ferry, WA/Almota, WA	\$20.73	\$20.65	\$20.28	2.2	4.3
	Lyons Ferry, WA	\$19.72	\$19.64	\$19.31	2.1	4.0
	Windust, WA/Lower Monumental, WA	\$18.69	\$18.61	\$18.32	2.0	3.7
	Sheffler, WA	\$18.66	\$18.58	\$18.29	2.0	3.7
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$17.46	\$17.38	\$17.14	1.9	3.2
	Port Kelly, WA/Wallula, WA	\$17.24	\$17.16	\$16.93	1.8	3.1
	Umatilla, OR	\$17.14	\$17.06	\$16.83	1.8	3.1
	Boardman, OR/Hogue Warner, OR	\$16.88	\$16.80	\$16.58	1.8	3.0
	Arlington, OR/Roosevelt, WA	\$16.72	\$16.64	\$16.43	1.8	2.9
	Biggs, OR	\$15.39	\$15.31	\$15.15	1.6	2.4
	The Dalles, OR	\$14.29	\$14.21	\$14.09	1.4	1.8

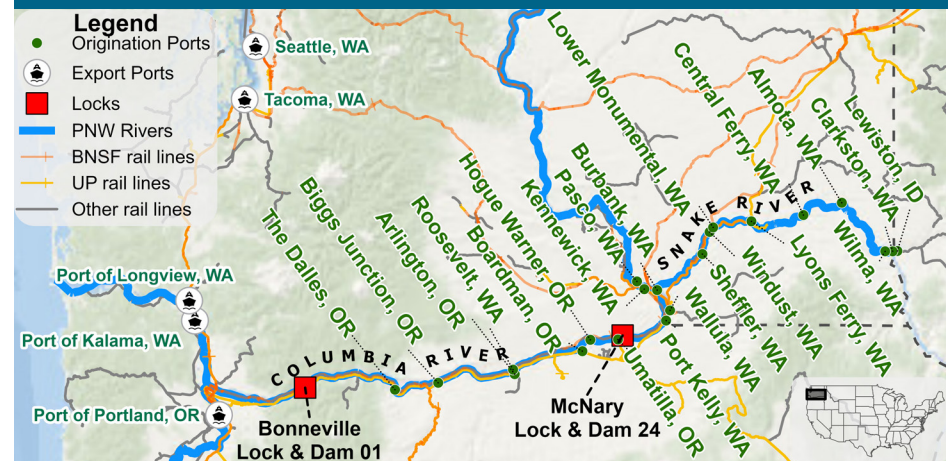
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

Table 12. Monthly barged grain movements Columbia-Snake (1,000 tons)

May, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	81	0	81
Columbia River (Bonneville Lock and Dam (L1))	99	0	99
Monthly total 2025	99	0	99
Monthly total 2024	425	0	425
2025 YTD	1,426	0	1,426
2024 YTD	1,064	0	1,064

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.

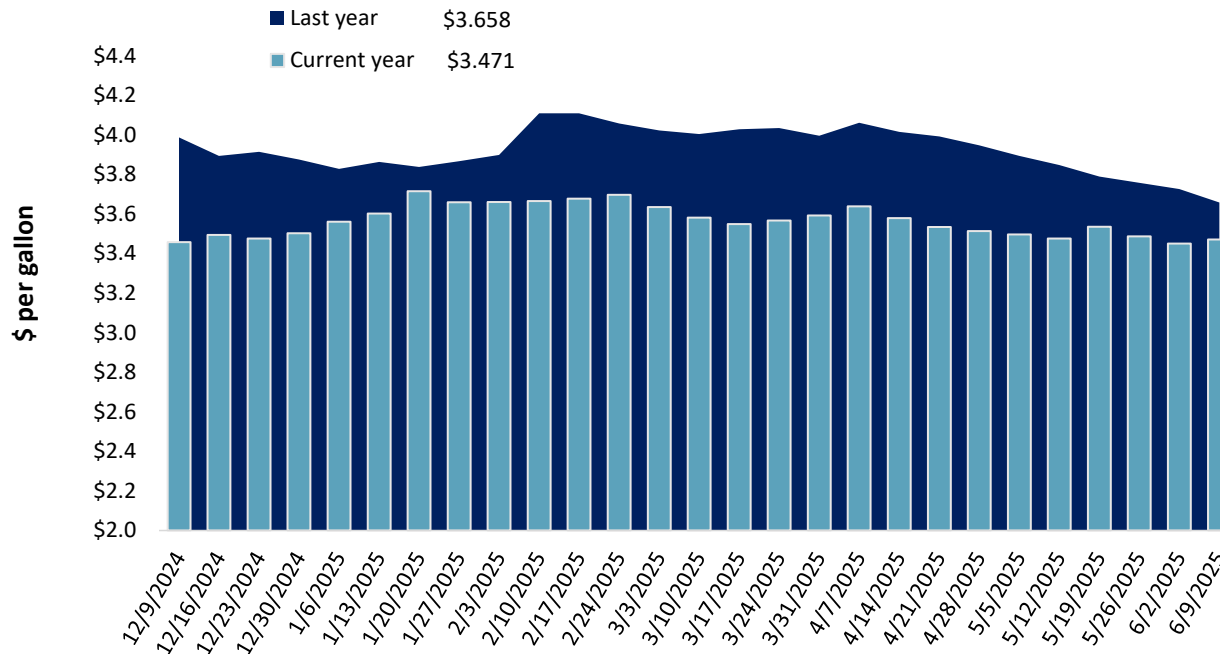
Table 13. Retail on-highway diesel prices, week ending 6/9/2025 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.525	0.008	-0.264
	New England	3.884	-0.001	-0.202
	Central Atlantic	3.761	-0.005	-0.266
	Lower Atlantic	3.399	0.015	-0.271
II	Midwest	3.429	0.041	-0.083
III	Gulf Coast	3.109	0.012	-0.275
IV	Rocky Mountain	3.481	0.028	-0.162
V	West Coast	4.217	-0.004	-0.130
	West Coast less California	3.764	0.019	-0.149
	California	4.739	-0.029	-0.172
Total	United States	3.471	0.020	-0.187

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 June 9, the U.S. average diesel fuel price increased 2.0 cents from the previous week to \$3.471 per gallon, 18.7 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 5/29/2025	185	51	93	31	18	377	15,288	3,985	19,650
	This week year ago	7	70	45	0	0	122	11,891	3,423	15,436
	Last 4 wks. as % of same period 2023/24	7,533	191	714	0	0	1,023	137	119	140
Current shipped (cumulative) exports sales	2024/25 YTD	5,271	3,087	6,512	5,706	335	20,910	49,850	44,666	115,426
	2023/24 YTD	3,535	4,248	6,308	3,906	526	18,522	39,378	39,978	97,878
	YTD 2024/25 as % of 2023/24	149	73	103	146	64	113	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 5/29/2025	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	2,179	21,466	20,879	3	17,746
Japan	565	11,397	9,433	21	9,366
China	0	33	2,741	-99	8,233
Colombia	100	6,721	5,254	28	4,383
Korea	2	5,387	2,167	149	1,565
Top 5 importers	2,846	45,003	40,474	11	41,293
Total U.S. corn export sales	3,163	65,138	51,268	27	51,170
% of YTD current month's export projection	5%	99%	88%	-	-
Change from prior week	160	942	1,181	-	-
Top 5 importers' share of U.S. corn export sales	90%	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 5/29/2025	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	23,867	22,479	6	28,636
Mexico	235	4,909	4,644	6	4,917
Japan	66	1,866	1,990	-6	2,231
Egypt	0	2,970	1,135	162	2,228
Indonesia	3	1,706	1,884	-9	1,910
Top 5 importers	304	35,317	32,132	10	39,922
Total U.S. soybean export sales	1,060	48,651	43,401	12	51,302
% of YTD current month's export projection	2%	97%	94%	-	-
Change from prior week	4	194	190	-	-
Top 5 importers' share of U.S. soybean export sales	29%	73%	74%	-	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 5/29/2025	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	937	3,842	3,217	19	3,298
Philippines	502	2,576	2,809	-8	2,494
Japan	422	2,115	1,962	8	2,125
China	0	139	2,113	-93	1,374
Korea	308	2,423	1,353	79	1,274
Taiwan	185	983	1,082	-9	921
Nigeria	235	801	276	190	920
Thailand	55	897	462	94	552
Colombia	191	568	350	62	522
Vietnam	95	622	427	46	313
Top 10 importers	2929	14,966	14,052	7	13,792
Total U.S. wheat export sales	5,337	21,287	18,644	14	18,323
% of YTD current month's export projection	24%	95%	97%	-	-
Change from prior week	445	-49	-229	-	-
Top 10 importers' share of U.S. wheat export sales	55%	70%	75%	-	75%
USDA forecast, May 2025	21,798	22,317	19,264	16	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (June 1 – May 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.

Source: USDA, Foreign Agricultural Service.

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

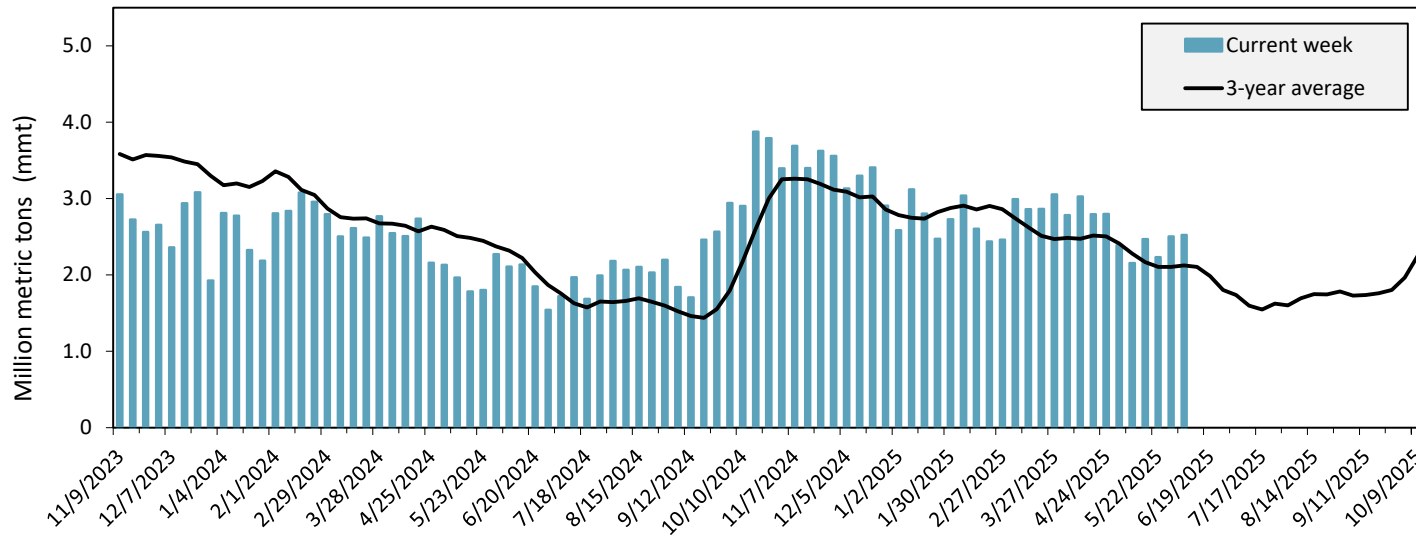
Port regions	Commodity	For the week ending 06/05/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	469	511	92	11,413	8,658	132	115	124	13,987
	Soybeans	0	0	n/a	1,966	2,513	78	0	0	10,445
	Wheat	103	362	28	4,903	4,635	106	111	126	11,453
	All grain	572	874	66	18,377	16,892	109	103	111	37,186
Mississippi Gulf	Corn	883	837	105	16,673	11,423	146	153	120	27,407
	Soybeans	389	200	194	10,063	10,780	93	122	106	29,741
	Wheat	43	34	125	1,501	2,468	61	126	111	4,523
	All grain	1,315	1,072	123	28,237	24,726	114	144	116	61,789
Texas Gulf	Corn	31	0	n/a	147	234	63	107	77	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	67	103	66	1,573	633	249	542	236	1,940
	All grain	113	112	101	1,965	2,666	74	172	111	6,965
Interior	Corn	266	288	92	5,770	6,050	95	96	129	13,463
	Soybeans	152	100	153	2,933	3,203	92	120	112	8,059
	Wheat	67	54	124	1,312	1,254	105	98	119	2,952
	All grain	499	442	113	10,258	10,622	97	106	127	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	11	0	n/a	104	134	78	96	73	653
	All grain	11	0	n/a	104	152	68	66	28	1,060
Atlantic	Corn	7	5	148	161	165	98	239	98	410
	Soybeans	6	1	507	450	428	105	207	16	1,272
	Wheat	0	0	n/a	34	10	323	n/a	918	73
	All grain	13	6	214	645	603	107	269	38	1,754
All Regions	Corn	1,657	1,642	101	34,164	26,530	129	127	121	56,109
	Soybeans	547	301	181	15,622	16,996	92	119	96	50,865
	Wheat	291	553	53	9,427	9,135	103	132	134	21,594
	All grain	2,523	2,506	101	59,690	55,714	107	122	114	133,979

*Note: Data include revisions from prior weeks; "All grain" includes corn, soybeans, wheat, sorghum, oats, barley, rye, sunflower, flaxseed, and mixed grains; "All regions" includes listed regions and other minor regions not listed; YTD= year-to-date; n/a = not available or no change. A "-" in the table indicates a percentage change with a near-zero denominator for the period.

Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2024, approximately 48 percent of the U.S. export grain shipments departed through the U.S. Gulf region and 27 percent departed through the PNW.

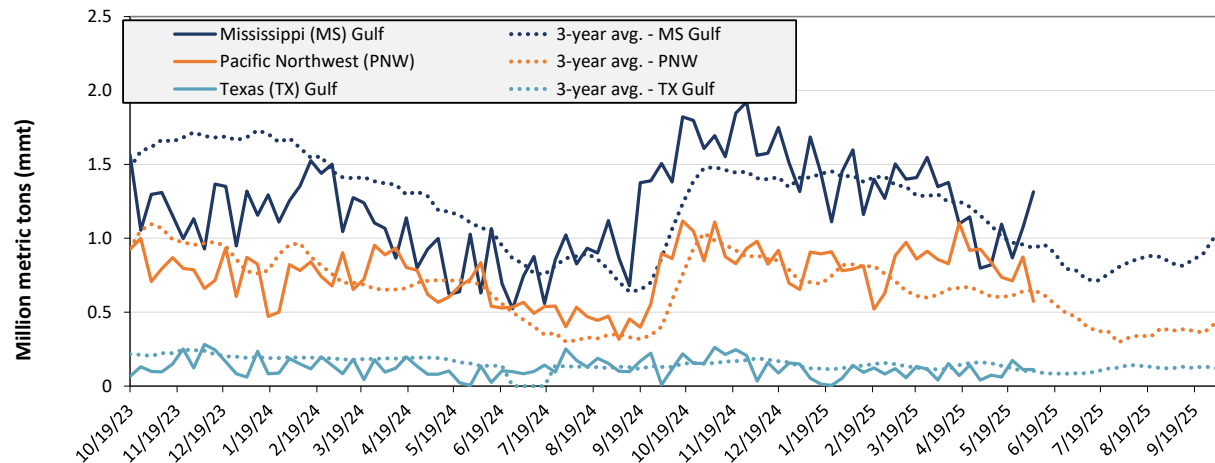
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jun. 05: 2.5 mmt of grain inspected, unchanged from the previous week, up 15 percent from the same week last year, and up 19 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 06/05/25 inspections (mmt):

MS Gulf: 1.31

PNW: 0.57

TX Gulf: 0.11

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 23	unchanged	up 21	down 34
Last year (same 7 days)	up 82	down 17	up 67	down 29
3-year average (4-week moving average)	up 41	up 9	up 38	down 12

Source: USDA, Federal Grain Inspection Service.

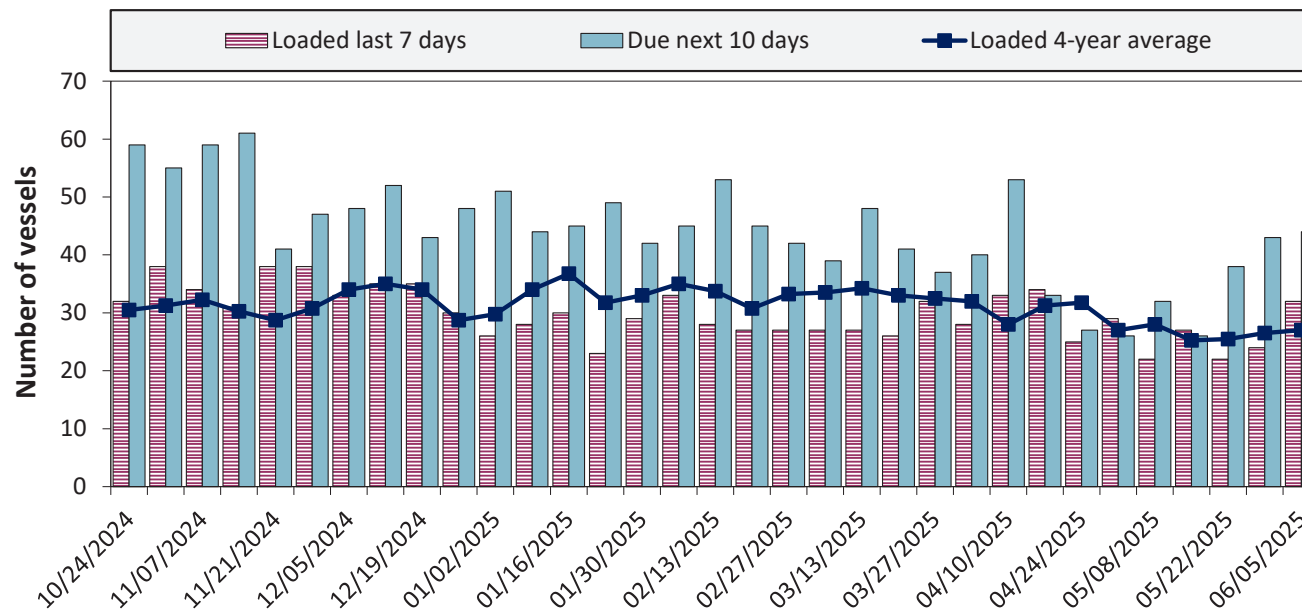
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
6/5/2025	15	32	44	6
5/29/2025	23	24	43	7
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

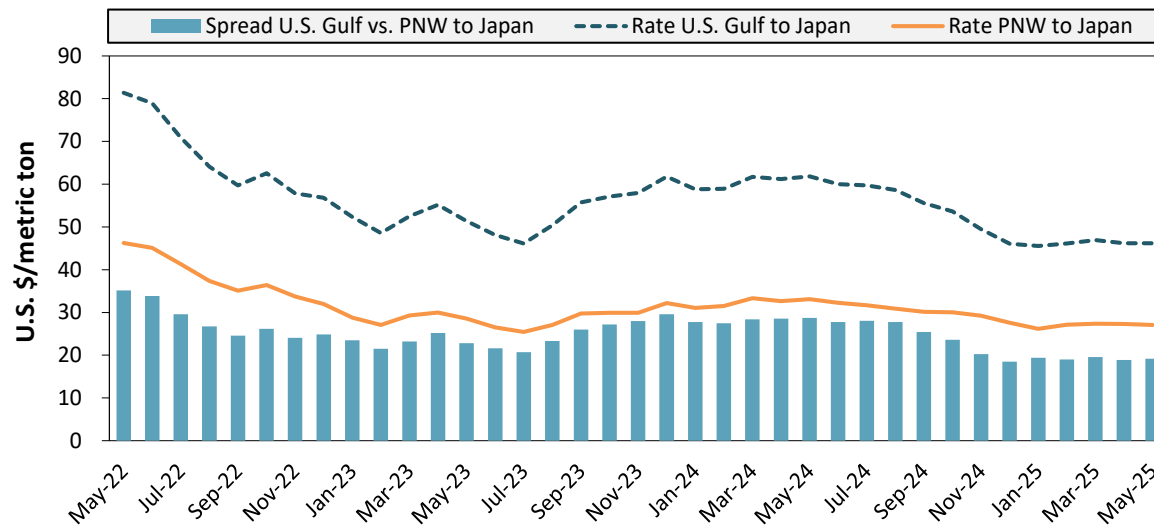


Week ending 06/05/25, number of vessels	Loaded	Due
Change from last year	39%	33%
Change from 4-year average	19%	25%

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



Note: PNW = Pacific Northwest

Source: O'Neil Commodity Consulting.

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%

Table 20. Ocean freight rates for selected shipments, week ending 6/7/2025

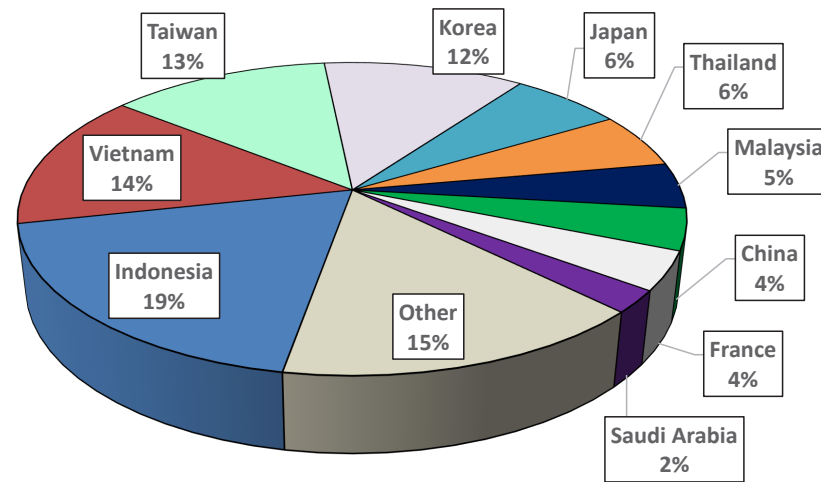
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	Japan	Heavy grain	Mar 13, 2025	May 1/10, 2025	49,000	50.50
U.S. Gulf	Morocco	Soybeans	May 23, 2025	Jun 5/15, 2025	46,000	42.38
PNW	Japan	Corn	Apr 22, 2025	Jun 1/10, 2025	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	China	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	China	Heavy grain	Jun 5, 2025	Jun 25/30, 2025	63,000	37.50
Brazil	China	Heavy grain	Jun 5, 2025	Jun 21/30, 2025	63,000	34.25
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	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	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.

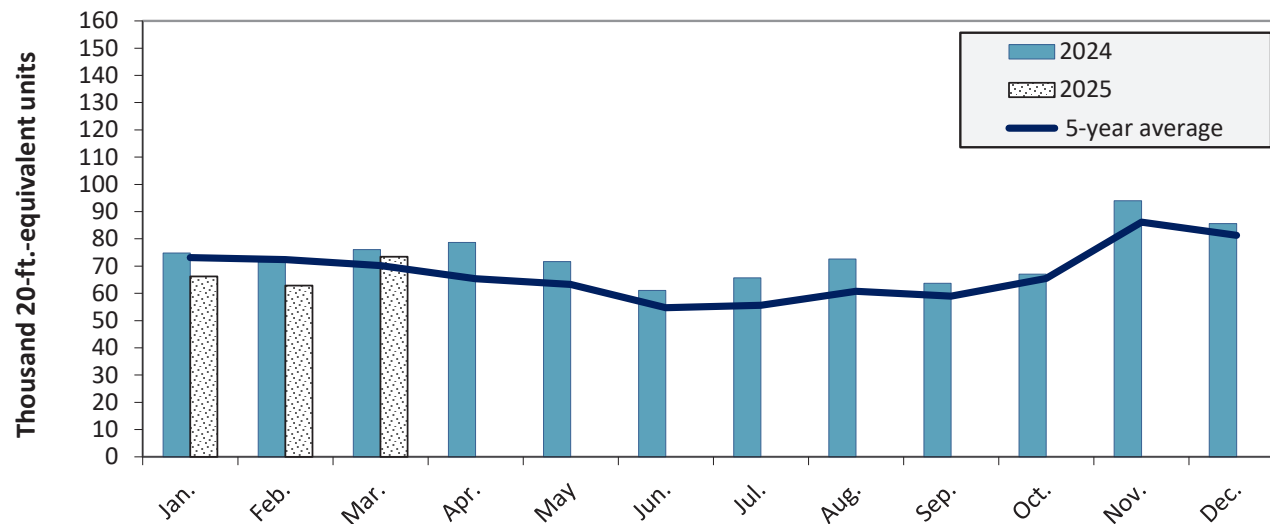
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Mar 2025



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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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. Grain Transportation Report. June 12, 2025.
Web: <http://dx.doi.org/10.9752/TS056.06-12-2025>

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