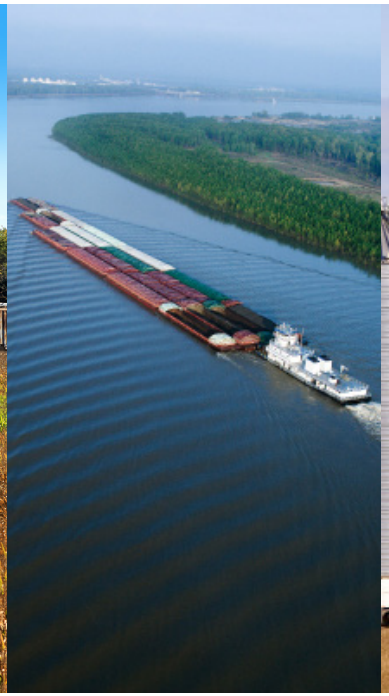
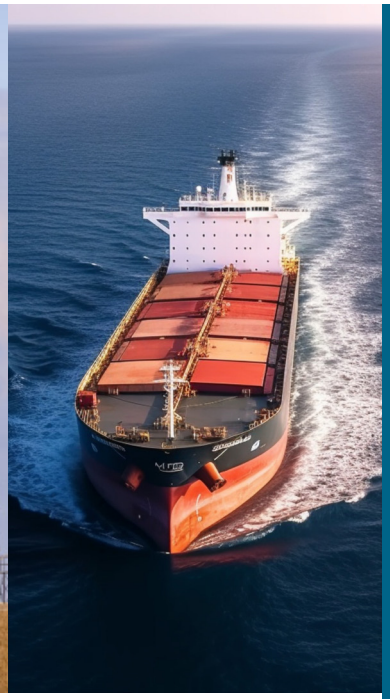
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

July 3, 2025
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www.ams.usda.gov/GTR

Recent USDA/NASS Reports Signal Grain Transportation Trends. According to NASS's *Grain Stocks report* (released June 30), grain "disappearance"—the difference between June and March stocks of corn, soybeans, old crop wheat, and other crops—was 4.9 billion bushels (bbu), up 3 percent from the prior 5-year average. During that period, rail carloads (GTR fig. 3) and barge movements (GTR fig. 12) were above average.

National grain stocks (as of June 1) were unchanged from the same time last year—but off-farm stocks were up 12 percent, and on-farm stocks were down 10 percent. These numbers mean lower potential transportation demand at the beginning of the supply chain (compared to last year), as more grain has left farms and entered marketing channels.

In its *Acreage report*, from marketing year (MY) 2024/25 to MY 2025/26, NASS forecasts higher harvested corn acreage offset by lower harvested soybean acres. State-level acreage differences may materialize in different transportation flows, as Indiana and Ohio are forecast to harvest 0.5 million fewer corn and soybean acres (combined) than the 5-year average (–3 percent), and the Dakotas are forecast to harvest 1.7 million more acres of those commodities (+8 percent).

STB Unable To Reach Majority on Rules for Private Railcar Use. In a June 26 decision, the Surface Transportation Board (STB) announced that it was unable to reach a majority in response to a petition calling for rules governing private railcar use by railroads. Thus, the proceeding remains open. In a concurrence, STB's Chair explained that issuing a decision without a majority allows Board members to transparently clarify their positions to the public and foster further "collaborative discussion."

In 2021, several trade associations (including those representing agriculture) petitioned STB to adopt regulations that would allow shippers/receivers to charge railroads when private railcars are unduly delayed—thereby incentivizing railroads to handle private cars more efficiently. USDA supported the petition, believing that it would incentivize improved car service.

Railroads opposed the petition, arguing that STB lacks the statutory authority to adopt the petitioner's proposed regulations. Railroads also argued that they already have sufficient incentives to move cars efficiently, because delayed cars can hinder their operations and reduce revenue.

BNSF and UP To Double Fees for Shuttle Cancellations. Both BNSF Railway (BNSF) and Union Pacific Railroad (UP) recently announced their charges will double to cancel a shuttle train contract. BNSF's cancelation charge, which is per car/per period, will rise from $200 to $400. (A period is one-third of a month.) UP's monthly cancelation charge will rise from $65,000 to $130,000.

The increased cancelation charges are likely to make the secondary market for shuttle trains more volatile (GTR table 5). Typically, shippers are willing to sell shuttle trips below tariff (i.e., negative values) when doing so is more profitable than canceling a shuttle contract and incurring the cancelation charge. This situation occurs most often during periods of low demand for grain rail transportation.

In BNSF and UP's shuttle train programs, the shuttles are auctioned to shippers for yearlong contracts. Throughout the contracts, shippers control where their shuttles load and unload. Unless the railroads fail to meet their service commitments, shippers must pay a cancelation charge to cancel an active shuttle contract.

Ports of Indiana Selects LDC To Operate Export Terminal at Burns Harbor. On June 23, the Ports of Indiana announced that it has selected Louis Dreyfus Company (LDC) to operate its 7.2 million bushel grain export facility at its Burns Harbor location. LDC is expected to begin operating the terminal in early 2026.

Located on the southern shore of Lake Michigan, Burns Harbor has access to the St. Lawrence Seaway, as well as the Mississippi River System. The facility also has connections to all Class I railroads.

First built in 1979, the facility was operated by Cargill until the company decided to relinquish its lease in mid-2023 (GTR, March 2, 2023, third 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 June 19, **unshipped balances** of corn and soybeans totaled 16.68 million metric tons (mmt), down 3 percent from last week and up 21 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 5.86 mmt, unchanged from last week and up 14 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 0.74 mmt, down 18 percent from last week. Net **soybean export sales** were 0.40 mmt, down 16 percent from last week. Net **wheat export sales** for MY 2025/26 were 0.26 mmt, down 40 percent from last week.

Rail

U.S. Class I railroads originated 25,972 **grain carloads** during the week ending June 21. This was a 5-percent increase from the previous week, 26 percent more than last year, and 24 percent more than the 3-year average.

Average July **shuttle secondary railcar bids/offers** (per car) were $46 below tariff for the week ending June 26. This was $79 more than last week and $265 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $17 above tariff. This was $38 more than last week and $121 lower than this week last year.

Barge

For the week ending June 28, **barged grain movements** totaled 577,250 tons. This was 24 percent less than the previous week and 9 percent more than the same period last year.

For the week ending June 28, 356 grain barges **moved down river**—129 fewer than last week. There were 562 grain barges **unloaded** in the New Orleans region, 6 percent more than last week.

Ocean

For the week ending June 26, 23 **oceangoing grain vessels** were loaded in the Gulf—28 percent more than the same period last year. Within the next 10 days (starting June 27), 44 vessels were expected to be loaded—2 percent less than the same period last year.

As of June 26, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $47.75, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $27.25 per mt, unchanged from the previous week.

Fuel

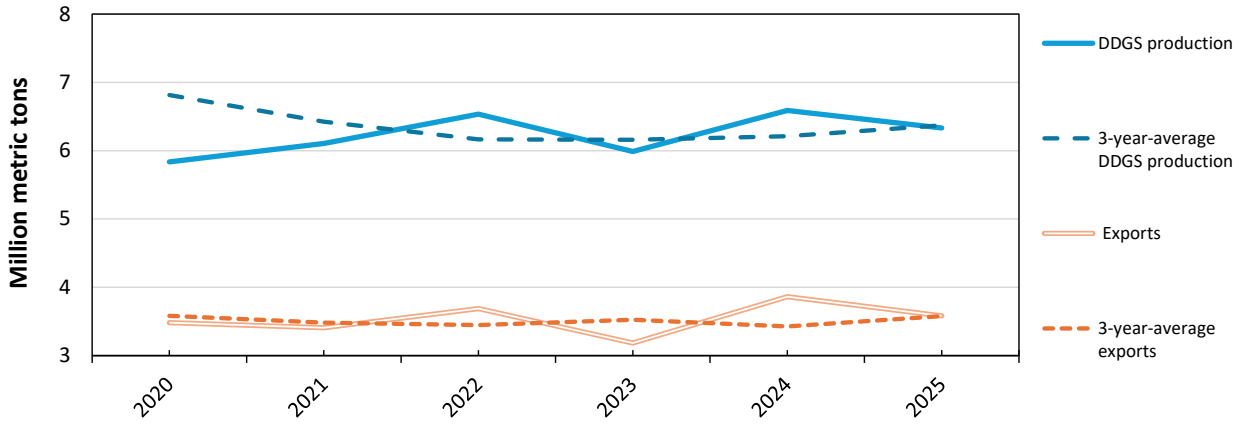
For the week ending June 30, the **U.S. average diesel fuel price** decreased 4.8 cents from the previous week to $3.727 per gallon, 8.6 cents below the same week last year.

Update on Exports and Transportation of DDGS

In 2024, distillers' dried grains with solubles (DDGS) accounted for 8 percent of total U.S. grain exports (corn, soybeans, wheat, and other coarse grains) and 30 percent of total containerized grain exports, by volume. Year to date (YTD) (through April), total DDGS exports fell 7 percent from the same period last year, because of declines in production and the top five buyers' purchases.[1] By type, YTD waterborne containerized and bulk DDGS exports also fell 15 percent and 11 percent, respectively, over the same period last year.

This article reviews YTD volumes of DDGS exports, export shares for top buyers and major ports, and market dynamics for bulk versus container shipping.

Figure 1. Grain transportation cost indicators as of week ending 7/2/25



Note: DDGS = dried distiller's grains.
Source: USDA, Foreign Agricultural Service.

DDGS Production and Exports Fall

Despite rising ethanol production in first quarter 2025, production of DDGS (ethanol's co-product) declined.[2] Year to date, U.S. DDGS production was down 4 percent from the same time last year and down 1 percent from the 3-year average. Typically, a majority of DDGS production is exported (fig. 1). (For example, in 2024, 59 percent of total DDGS production was exported.) YTD U.S. DDGS exports were also down 7 percent from the same time last year and unchanged from the 3-year average. Lower DDGS purchases from the top importers accounted for the decreases.

Importing Countries. Of all YTD exports of U.S. DDGS, the top 6 buyers—Mexico, South Korea, Indonesia, Vietnam, Colombia, and Canada—received 65 percent. Compared to the same period last year, YTD DDGS exports declined to all top buyers, except Colombia, which saw a 47-percent increase. The largest decreases were to Indonesia (–18 percent); Mexico (–16 percent); South Korea (–14 percent); Vietnam (–13 percent); and Canada (–7 percent). Notably, DDGS purchases by Turkey—which had been the fifth-largest buyer in 2024—fell 43 percent from the same time last year.[3]

Port Shares of DDGS Exports. Of all YTD exports of U.S. DDGS, 66 percent left through five districts: ocean shipments sailed from New Orleans, LA (27 percent); Los Angeles, CA (16 percent); and Norfolk, VA (6 percent)—while rail and, possibly, truck shipments left from Laredo, TX (10 percent), and El Paso, TX (7 percent). Of the Los Angeles district's total DDGS exports, shipments to South Korea, Vietnam, and Japan accounted for 75 percent. Of the New Orleans district's total DDGS

1 Unless otherwise specified, YTD statistics are through April 30, 2025.
2 The increased operational efficiency of dry mill ethanol plants, has resulted in more ethanol and corn oil production and less DDGS production. For example, the DDGS conversion rate had declined from 17.25 pounds per bushel of corn in 2014 to 14.78 pounds in June 2024.
3 Turkey's purchases fell because it stopped accepting imports of U.S. corn co-products following the enforcement of existing biosafety laws restricting which genetically modified corn varieties can enter the country's grain supply. Vietnam's imports of DDGS declined as corn prices fell because Vietnamese importers prefer to purchase seed corn over DDGS.

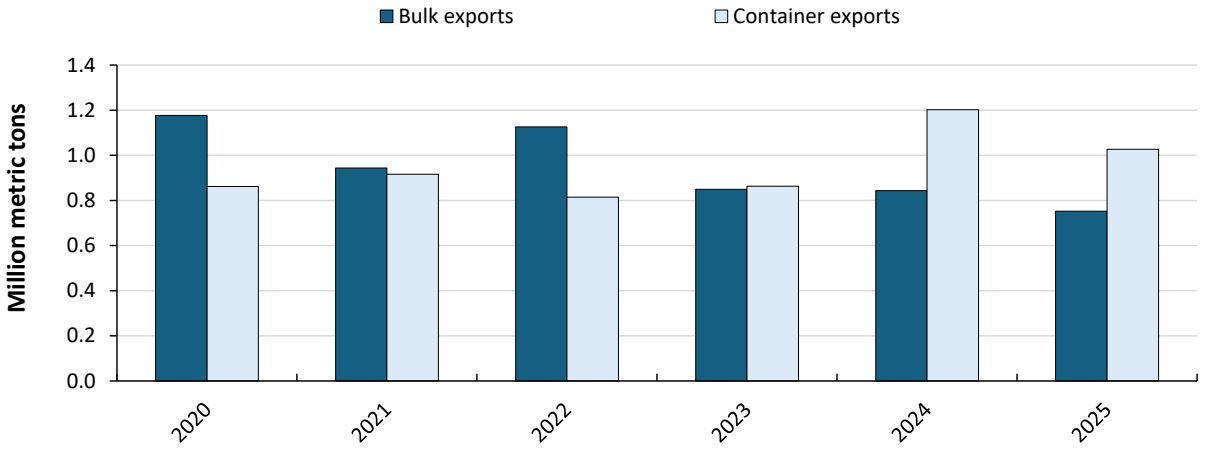
exports, those to Columbia, Ireland, Morocco, Turkey, and Mexico accounted for 62 percent. Of the Norfolk district's total DDGS exports, those to Indonesia, Turkey, and Vietnam accounted for 71 percent.

Waterborne Containerized vs. Bulk DDGS Export Volumes. Waterborne DDGS exports are either bulk or container shipments, and DDGS exports can shift fairly easily between these two market segments.[4] DDGS accounted for 30 percent of the U.S. containerized grain export market in 2024—the second-largest share (after soybeans).

Shares and Volumes. In 2023 and 2024, bulk grain exports faced substantial logistical challenges: from restricted vessel transits at the Panama Canal to costly diversions through the Red Sea—to even costlier diversions (in terms of ton-miles) around the Cape of Good Hope, Africa's southern tip (***Grain Transportation Report (GTR), August 15, 2024***). As a result, containerized DDGS gained market share. From 2022 to 2024, the share of January-April containerized exports rose from 42 percent to 59 percent (fig. 2).

YTD exports of containerized and bulk DDGS fell from the same period last year. Of the total YTD exports of U.S. waterborne DDGS, containerized DDGS exports were down 15 percent from the same period last year, but up 7 percent from the 3-year average.[5] YTD bulk exports were also down 11 percent from the same time last year and down 20 percent from the 3-year average. YTD market shares of waterborne DDGS exports mostly held steady from last year: bulk rose 1 percentage point, and container fell 1 percentage point.

Figure 2. Grain transportation cost indicators as of week ending 7/2/25



Source: IHS Markit/PIERS

Though apparently small, these market shifts likely resulted from bulk ocean rates' drop relative to container rates. From January to April, for a 40-foot container from the U.S. West Coast to Shanghai, China, container shipping rates averaged $796.50—*unchanged* from the prior year and down 27 percent from the 5-year average. In contrast, for the same YTD period, freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged $26.93 per metric ton—*down* 16 percent from the prior year and down 15 percent from the prior 5-year average. Bulk ocean freight rates remained low in part because of an ample supply of vessels (***GTR, April 25, 2024***).

Top Importers of Waterborne DDGS. Of YTD exports of waterborne U.S. DDGS, the top five buyers were Vietnam, Indonesia, South Korea, Turkey, and Colombia—together, accounting for 52 percent. Of these buyers, only Vietnam purchased more than the same period last year (up 15 percent), displacing South Korea as the largest importer. Purchases from Turkey (second-largest importer in 2024) were down 26 percent.

4 Several factors—such as container availability, freight rates, and shipment volume—determine the economic viability of bulk vs. container shipping. The growth in DDGS exports and changes in destination markets may also require the market to shift between bulk and containerized shipments. For example, some emerging destinations require mostly bulk shipments of DDGS, while others can accept only containers.

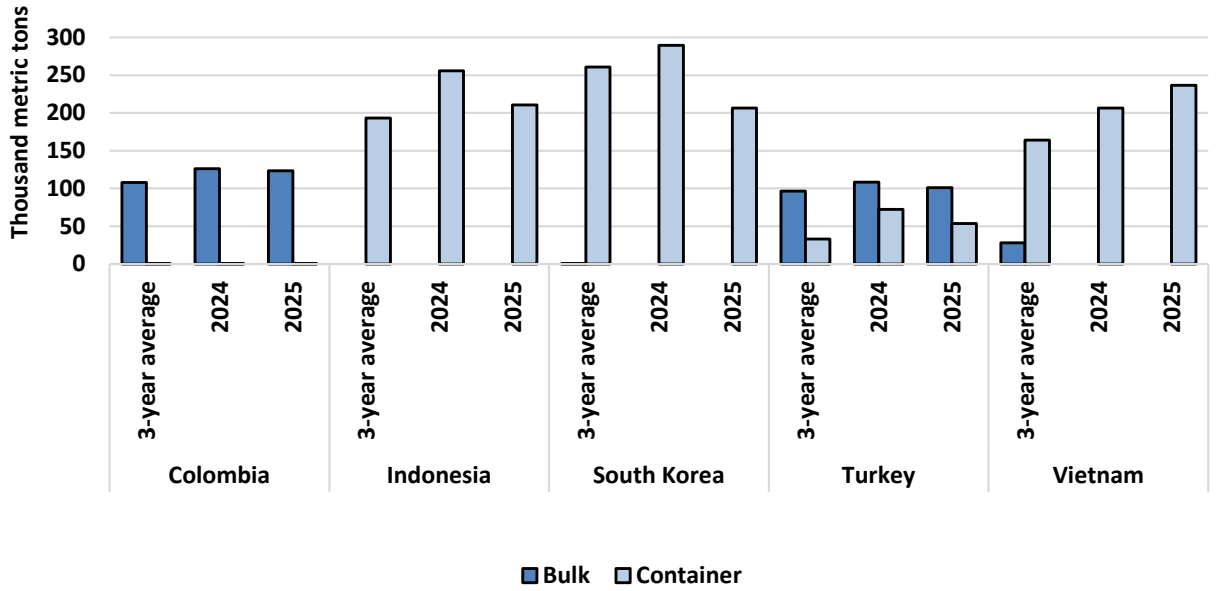
5 These statistics are based on PIERS/IHS Markit data, which do not include cross-border movements.

Indonesia and South Korea have purchased only containerized DDGS since 2019, and Vietnam has done the same since 2023 (fig. 3). Some countries—like Turkey, Japan (eighth largest buyer), and Thailand (ninth largest)—purchase a mix of bulk and container. Those buyers have gravitated toward greater shares of containerized DDGS over time. For instance, Turkey's and Japan's YTD container shares were up 10 percent and 18 percent, respectively, from the 3-year average. One potential reason for these rises is that—compared to the 3-year average—YTD container rates (–33 percent) dropped faster than bulk rates (–20 percent).

Ocean Shipping: A Look Ahead

Recent changes have affected both U.S. bulk and containerized agricultural exports. Tariffs imposed on goods moving between Chinese and U.S. ports (effective April 4, 2025) prompted leading ocean carriers to increase blank sailings and to reposition vessels to different trade lanes. These changes, in turn, caused declines in bookings and vessel capacity. However, a 90-day pause on tariffs (effective May 12) spurred a jump in bookings that has led to rising container rates and uncertainty about available vessel capacity.

Figure 3. Grain transportation cost indicators as of week ending 7/2/25



Note: Where Columbia's containerized purchases and South Korea's 3-year-average bulk purchases are represented by only a flat, dark line, these numbers are all less than 100 metric tons.
Source: IHS Markit/PIERS

In October, the United States Trade Representatives (USTR) will assess a fee at $50 per net vessel ton for Chinese-owned shipping companies and $18 per net vessel ton for non-Chinese shipping companies operating Chinese-built vessels (**GTR, April 24, 2025, first highlight**).[6] The USTR fee will gradually increase over the next 3 years. However, Chinese-built vessels (with non-Chinese operators) are exempt if they arrive empty or are below 80,000 deadweight tonnage capacity.

Bulk and containerized DDGS exports and, thus, transportation demand in the coming months will continue to respond to changes in the marketplace for ocean shipping.

Kranti.Mulik@usda.gov

6 For context, in 2024, two Chinese-owned carriers were the fifth- and sixth-top containerized grain carriers in 2024.

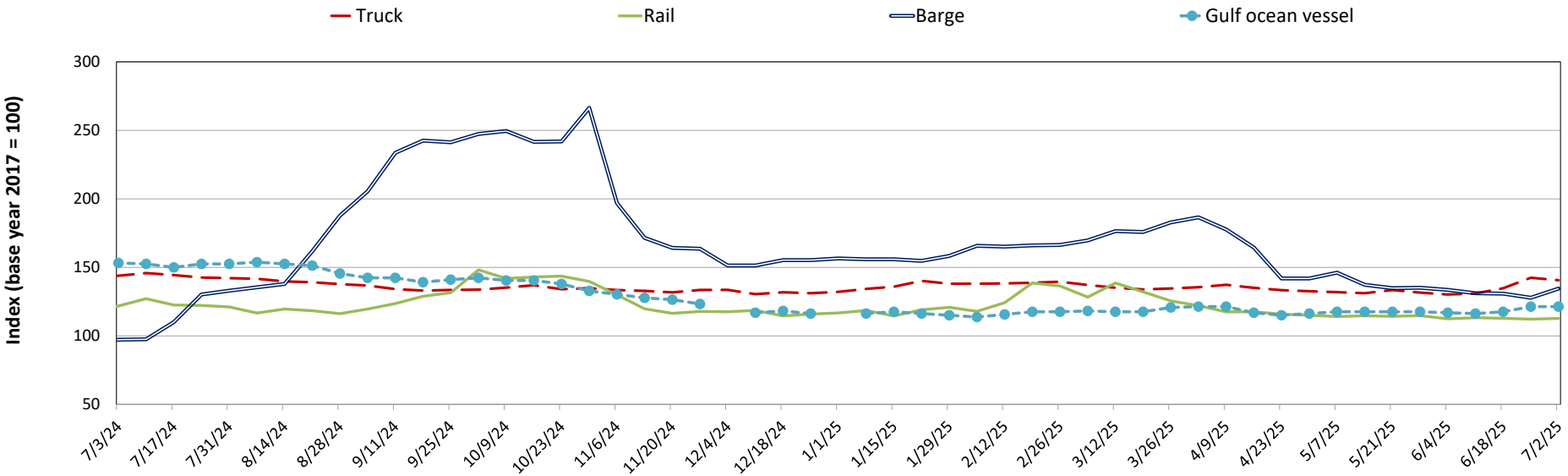
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
07/02/25	141	113	135	121	129
06/25/25	142	112	128	121	129
07/03/24	144	122	97	153	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.

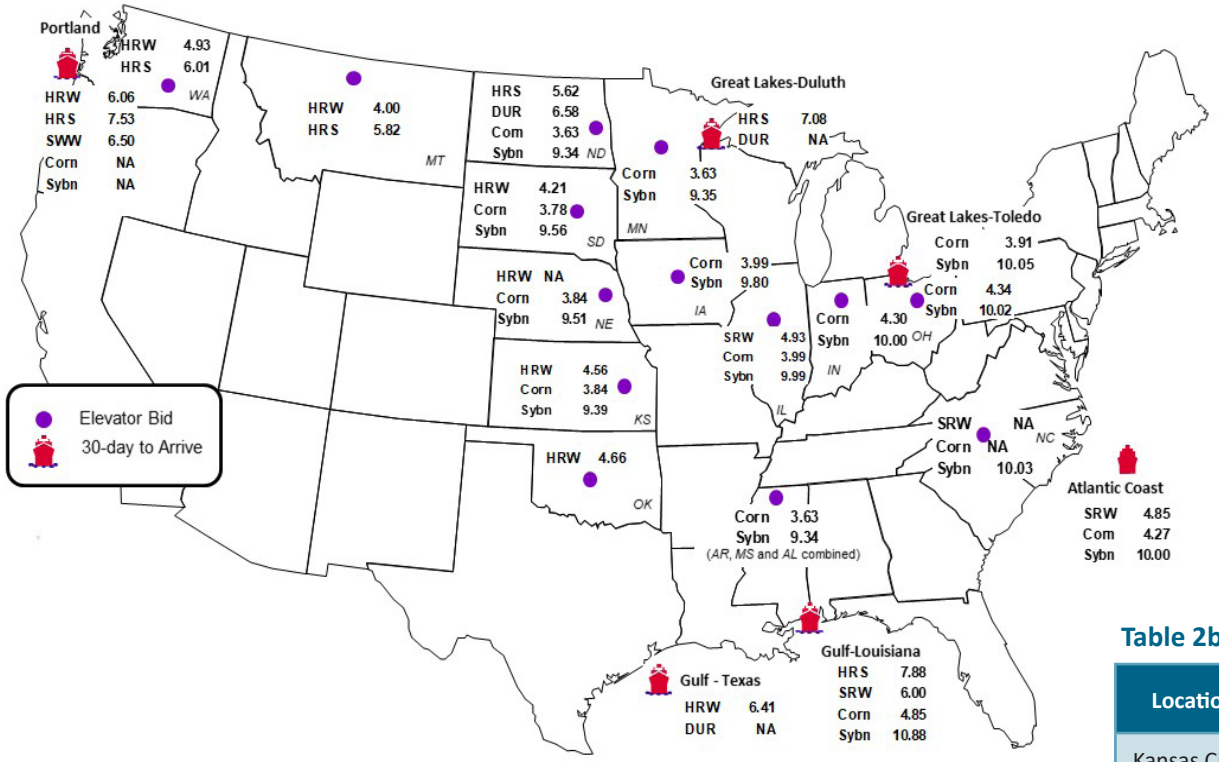
Figure 1. Grain transportation cost indicators as of week ending 7/2/25



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	6/27/2025	6/20/2025
Corn	IL–Gulf	-0.86	-0.85
Corn	NE–Gulf	-1.01	-0.99
Soybean	IA–Gulf	-1.08	-1.11
HRW	KS–Gulf	-1.85	-1.96
HRS	ND–Portland	-1.91	-2.06

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	6/27/2025	Week ago 6/20/2025	Year ago 6/28/2024
Kansas City	Wheat	Sep	5.336	5.786	5.936
Minneapolis	Wheat	Sep	6.280	6.566	6.130
Chicago	Wheat	Sep	5.406	5.832	5.856
Chicago	Corn	Sep	4.270	4.410	4.190
Chicago	Soybean	Sep	10.248	10.606	11.064

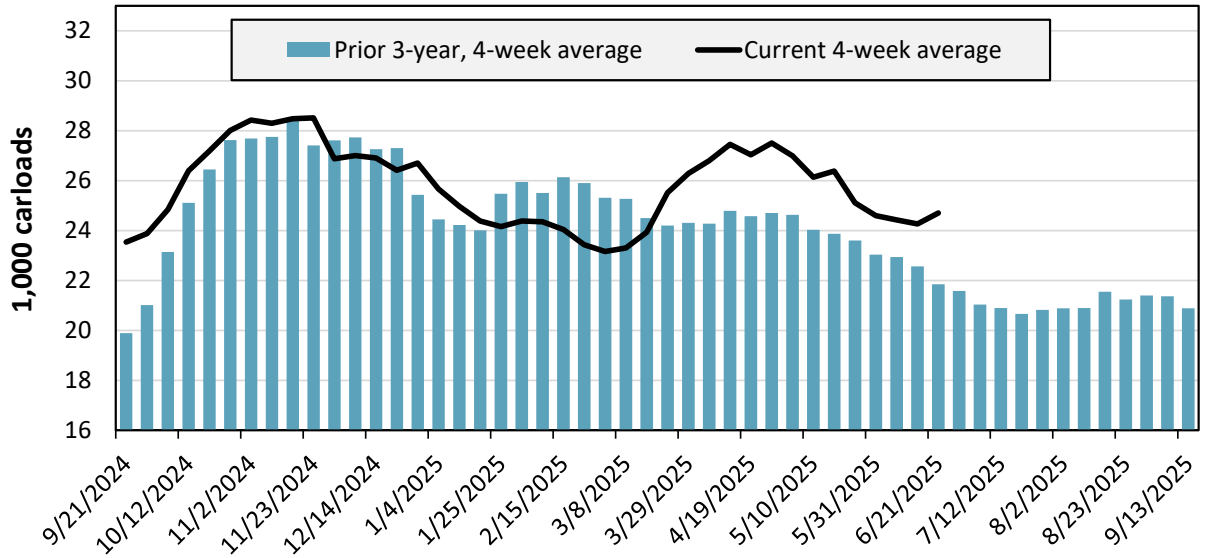
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 6/21/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,288	2,587	11,413	6,012	3,119	1,553	25,972
This week last year	1,084	2,795	9,613	4,003	2,400	711	20,606
2025 YTD	40,587	70,992	272,519	143,632	66,590	34,726	629,046
2024 YTD	41,157	66,207	264,579	129,293	69,219	22,901	593,356
2025 YTD as % of 2024 YTD	99	107	103	111	96	152	106
Last 4 weeks as % of 2024	93	105	105	122	125	212	113
Last 4 weeks as % of 3-yr. avg.	81	101	113	119	138	120	113
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 June 21, grain carloads were up 2 percent from the previous week, up 13 percent from last year, and up 13 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: 6/20/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	19.5	32.3	20.3	16.5	7.7	19.3	19.3
	Average over last 4 weeks	16.4	31.6	15.8	16.6	6.9	15.4	17.1
	Average of same 4 weeks last year	24.5	36.5	15.5	18.5	7.1	n/a	20.4
Average grain unit train speeds (miles per hour)	This week	21.3	18.1	24.6	22.6	23.4	17.5	21.3
	Average over last 4 weeks	22.3	18.7	25.3	22.7	25.4	17.3	21.9
	Average of same 4 weeks last year	23.2	18.9	25.1	22.6	24.7	n/a	22.9

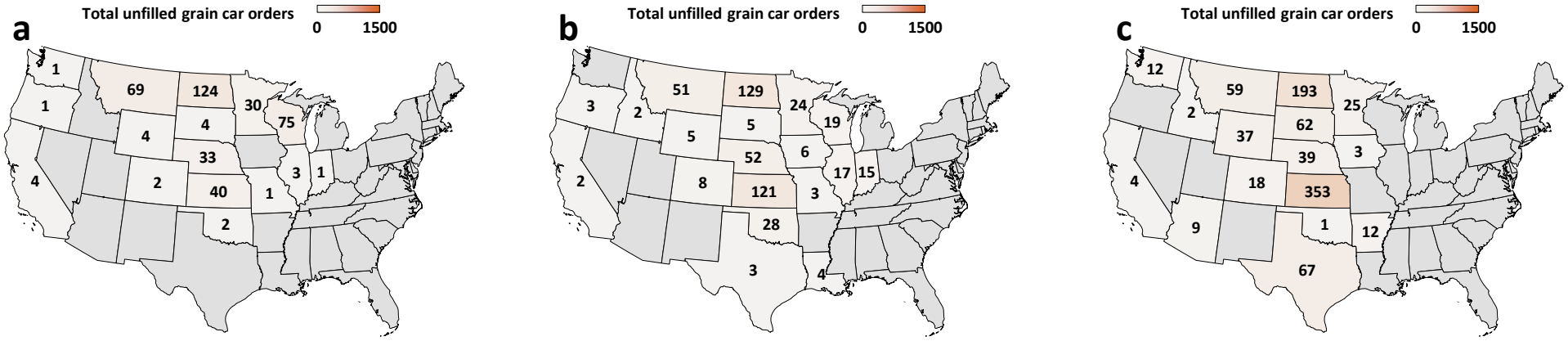
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 6/20/2025		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	7	7	272	114	16	404	820
	Average over last 4 weeks	14	6	207	91	9	246	573
	Average of same 4 weeks last year	12	9	449	99	3	n/a	571
Average number of loaded grain cars not moved in over 48 hours	This week	13	137	372	59	18	442	1,041
	Average over last 4 weeks	22	175	280	58	9	379	922
	Average of same 4 weeks last year	44	274	775	140	9	n/a	1,241
Average number of grain unit trains held	This week	1	1	3	3	0	5	13
	Average over last 4 weeks	0	1	3	4	0	5	12
	Average of same 4 weeks last year	1	3	13	9	0	n/a	25
Total unfilled manifest grain car orders	This week	1	0	239	52	0	202	494
	Average over last 4 weeks	16	4	225	182	0	119	545
	Average of same 4 weeks last year	1	0	465	420	0	n/a	885

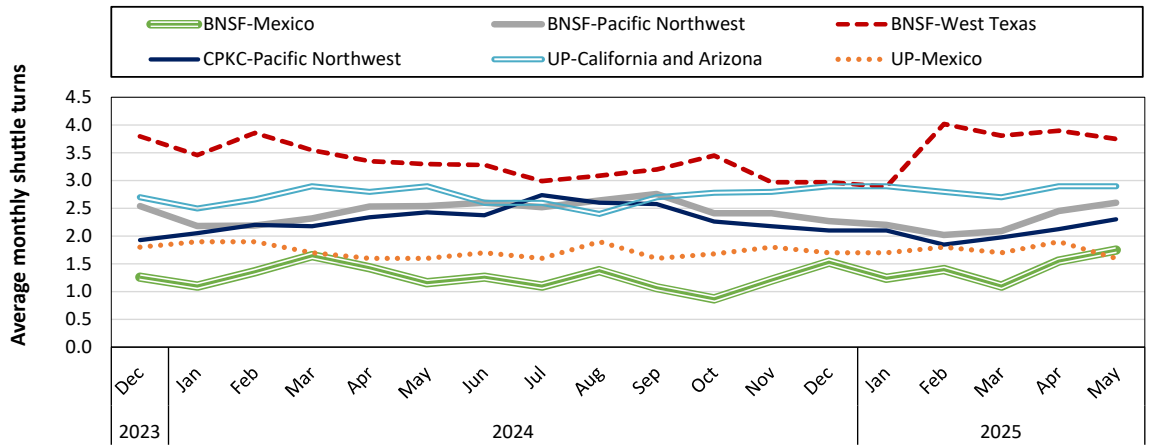
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 6/20/2025 (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

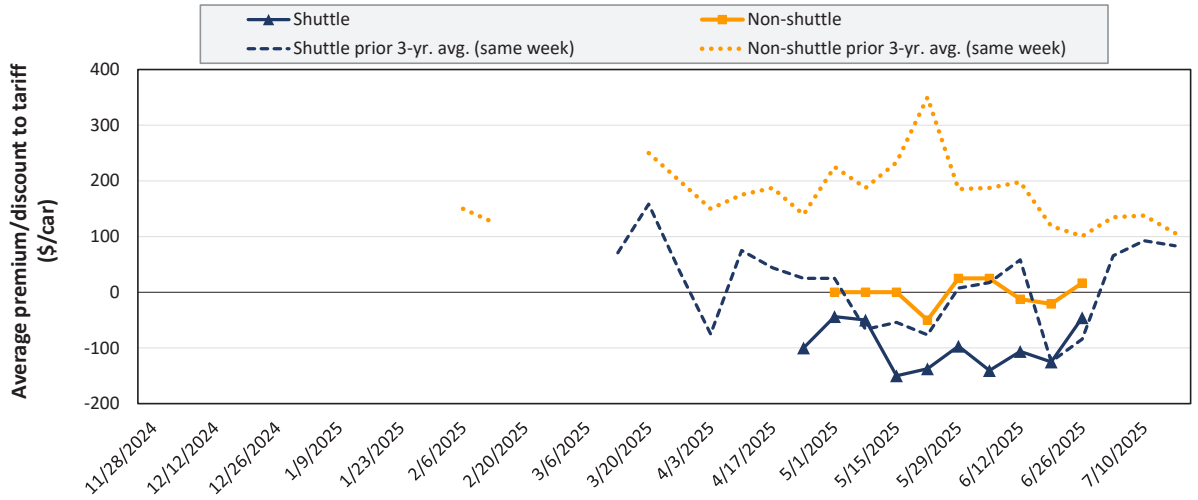


In May 2025, BNSF Railway's average monthly grain shuttle turns were 1.8 to Mexico, 2.6 to the Pacific Northwest, and 3.8 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.6 to 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. 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 July 2025



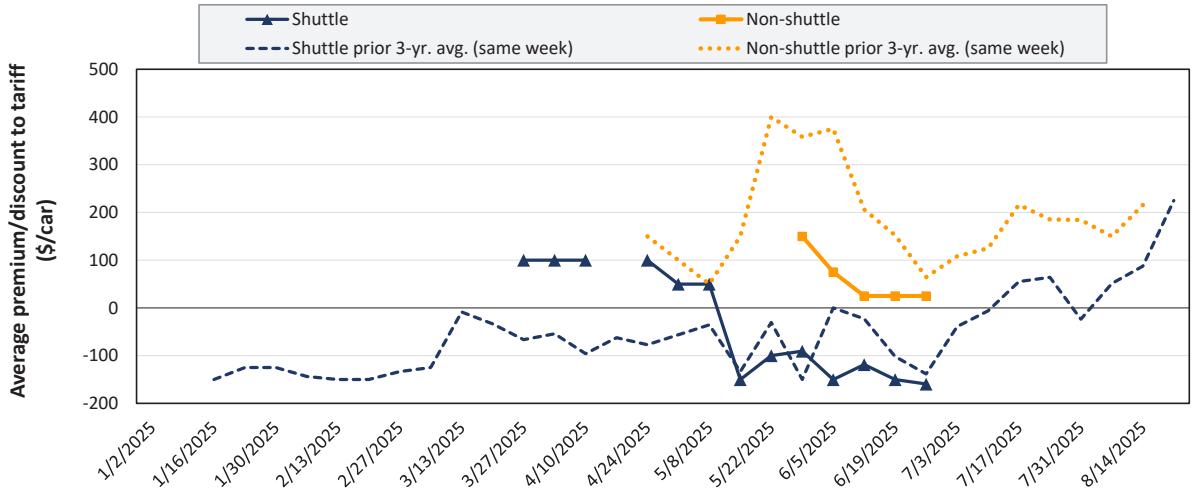
Average non-shuttle bids/offers rose $38 this week, and are $8 below the peak.

Average shuttle bids/offers rose $79 this week and are $2 below the peak.

6/26/2025	BNSF	UP
Non-Shuttle	$83	-$50
Shuttle	$88	-$179

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 August 2025



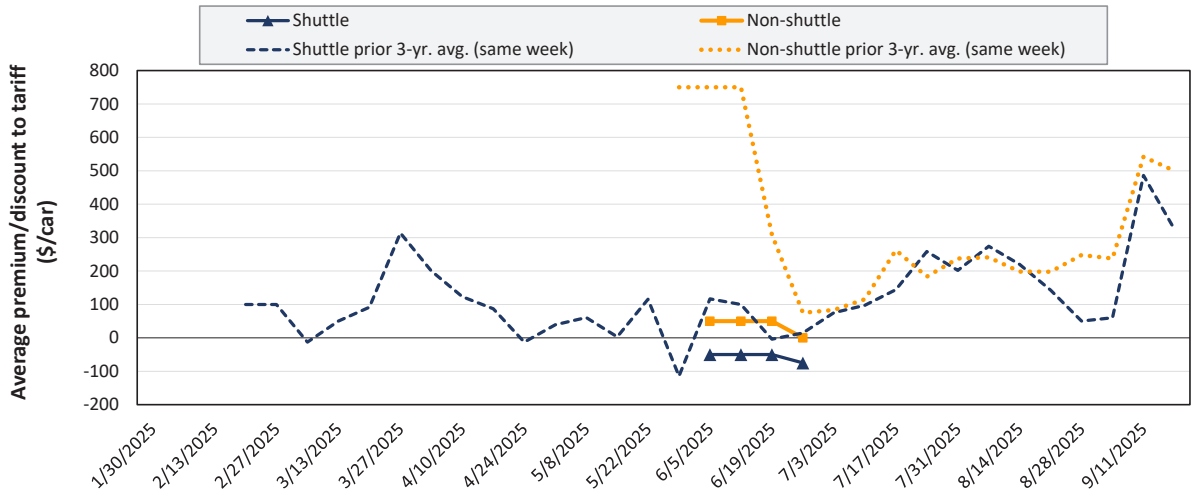
Average non-shuttle bids/offers are unchanged this week, and are $125 below the peak.

Average shuttle bids/offers fell $9 this week and are $259 below the peak.

6/26/2025	BNSF	UP
Non-Shuttle	$100	-$50
Shuttle	-$69	-$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 September 2025



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

Average shuttle bids/offers fell $25 this week and are $25 below the peak.

6/26/2025	BNSF	UP
Non-Shuttle	n/a	$0
Shuttle	-$50	-$100

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: 6/26/2025		Delivery period					
		Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25
Non-shuttle	BNSF	n/a	83	100	n/a	n/a	n/a
	Change from last week	n/a	25	0	n/a	n/a	n/a
	Change from same week 2024	n/a	-42	-13	n/a	n/a	n/a
	UP	n/a	-50	-50	0	n/a	n/a
	Change from last week	n/a	50	0	0	n/a	n/a
	Change from same week 2024	n/a	-200	-213	-100	n/a	n/a
Shuttle	BNSF	25	88	-69	-50	650	n/a
	Change from last week	-25	75	-19	0	-100	n/a
	Change from same week 2024	n/a	-338	n/a	-200	n/a	n/a
	UP	-225	-179	-250	-100	n/a	n/a
	Change from last week	0	84	0	n/a	n/a	n/a
	Change from same week 2024	n/a	-192	-150	25	n/a	n/a
	CPKC	n/a	-100	n/a	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	50	n/a	n/a	n/a	n/a

Note: 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, July 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	$83.09	$5,715.09	$1.54	$56.75	3.7
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,091	$42.77	$4,133.77	$1.12	$41.05	6.5
	CP	Westby, MT	St. Louis, MO	Unit	$6,500	$368.80	$6,868.80	$1.86	$68.21	5.4
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,604	$49.77	$4,653.77	$1.26	$46.21	5.5
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,015	$105.07	$6,120.07	$1.65	$60.78	3.0
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,665	$20.58	$2,685.58	$0.73	$26.67	11.5
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,432	$107.03	$5,539.03	$1.50	$55.01	3.3
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,638	$88.69	$5,726.69	$1.55	$56.87	3.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,212	$72.66	$5,284.66	$1.43	$52.48	4.3
	CP	Minot, ND	Kalama, WA	Unit	$5,498	$390.17	$5,888.17	$1.59	$58.47	4.4
	CP	Nekoma, ND	Chicago, IL	Manifest	$4,830	$234.49	$5,064.49	$1.37	$50.29	5.6
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$44.66	$3,444.66	$0.93	$34.21	-12.6
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$39.41	$3,639.41	$0.98	$36.14	-15.0
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$133.00	$5,933.00	$1.60	$58.92	-15.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$96.32	$5,796.32	$1.57	$57.56	-2.3
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$60.13	$4,260.13	$1.15	$42.31	-13.3
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$52.99	$4,052.99	$1.10	$40.25	-14.1
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$60.48	$3,560.48	$0.96	$35.36	-15.6
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$44.31	$3,744.31	$1.01	$37.18	-13.2
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$44.66	$3,944.66	$1.07	$39.17	-12.5
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$325.64	$4,850.64	$1.31	$48.17	-9.0
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$121.80	$5,088.80	$1.38	$50.53	1.2
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$160.72	$3,935.72	$1.06	$39.08	-10.1
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$214.20	$4,239.20	$1.15	$42.10	-9.7
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,591	$54.04	$4,645.04	$1.26	$46.13	5.4
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,239	$53.06	$4,292.06	$1.16	$42.62	5.9
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$23.31	$2,055.31	$0.56	$20.41	-1.3
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. 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, July 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	$74.62	$5,874.62	$1.48	$58.34	3.8
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$117.88	$5,587.88	$1.41	$55.49	-4.8
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$124.32	$6,124.32	$1.54	$60.82	2.6
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$50.96	$5,090.96	$1.28	$50.56	5.0
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$123.13	$5,473.13	$1.38	$54.35	-5.0
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$65.45	$4,625.45	$1.17	$45.93	5.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$53.48	$4,853.48	$1.22	$48.20	5.2
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$65.59	$4,605.59	$1.16	$45.74	5.1
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$99.33	$5,529.33	$1.39	$54.91	-4.5
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$116.62	$5,546.62	$1.40	$55.08	-4.9
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$271.01	$2,352.01	$0.59	$23.36	6.6
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$271.01	$2,732.01	$0.69	$27.13	5.7
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,047	$448.72	$5,495.72	$1.39	$54.58	-3.6
	CP	Glenwood, MN	Boardman, OR	Railroad	$5,513	$431.79	$5,944.79	$1.50	$59.03	1.6
	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	$40.80	$1,382.80	$0.35	$13.73	-0.6
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$193.48	$4,278.48	$1.08	$42.49	5.7
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$440.16	$6,445.16	$1.63	$64.00	2.7
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$486.36	$6,651.36	$1.68	$66.05	2.4
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$199.92	$5,204.92	$1.31	$51.69	4.6
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$329.28	$6,014.28	$1.52	$59.72	3.4
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$202.44	$4,427.44	$1.12	$43.97	5.5
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$106.96	$6,241.96	$1.69	$61.99	-4.2
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$102.83	$6,187.83	$1.67	$61.45	-4.1
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$59.85	$3,459.85	$0.94	$34.36	-25.0
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$113.68	$6,298.68	$1.70	$62.55	-4.3
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$6,235	$116.62	$6,351.62	$1.72	$63.07	-4.3
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$271.01	$2,352.01	$0.64	$23.36	7.0
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$271.01	$2,732.01	$0.74	$27.13	6.0
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,785	$448.72	$6,233.72	$1.68	$61.90	-3.2
	CP	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$342.96	$3,868.96	$1.05	$38.42	-1.1
	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	$209.16	$5,359.16	$1.45	$53.22	4.4
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$437.36	$6,577.36	$1.78	$65.32	2.7
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$301.84	$5,811.84	$1.57	$57.71	3.6
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$344.68	$5,934.68	$1.60	$58.93	3.4

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.

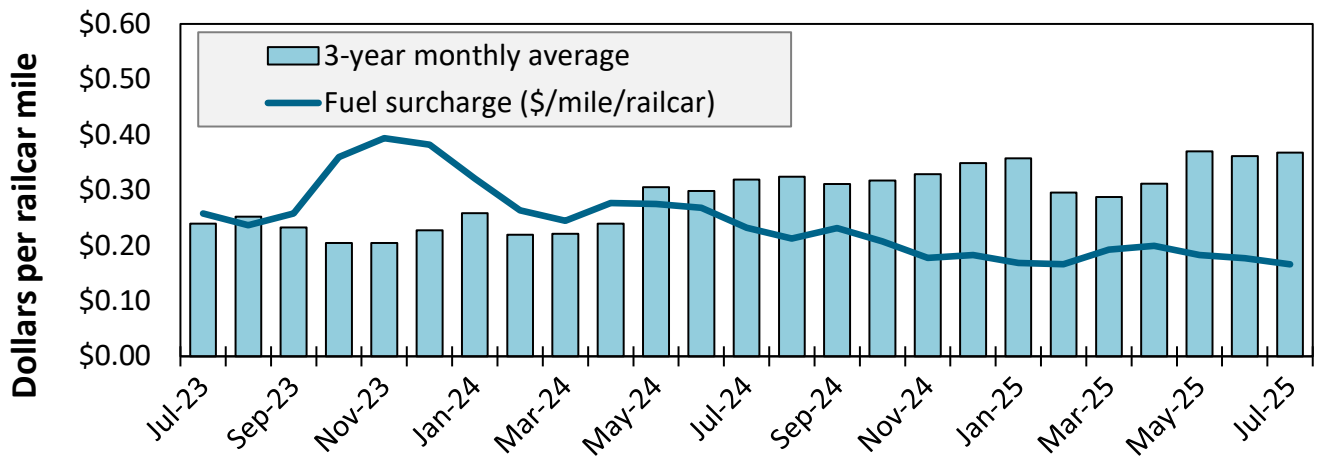
Source: BNSF, CN, CPKC, CSX, and UP.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, July 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	$4,650	$45.77	$1.16	-0.3	4.4
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,415	$53.29	$1.35	-0.4	-
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,538	$54.51	$1.38	-0.4	-
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,658	$45.84	$1.16	-0.3	4.2
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,043	$49.63	$1.26	-0.5	3.9
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,176	$50.94	$1.29	-0.5	3.7
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,071	$49.91	$1.27	-0.2	4.5
	Delhi, LA	Laredo, TX	CPKC	Non-shuttle	$3,995	$39.32	$1.00	-0.3	-
	Slater, MO	Laredo, TX	CPKC	Non-shuttle	$5,402	$53.17	$1.35	-0.4	
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,415	$53.29	$1.45	-0.4	-
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,590	$64.86	$1.77	-0.4	3.0
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,538	$54.51	$1.48	-0.4	-
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,691	$65.85	$1.79	-0.4	2.9
	Corder, MO	Laredo, TX	CPKC	Non-shuttle	$5,389	$53.04	$1.44	-0.4	-
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,087	$30.38	$0.83	-0.4	-26.9
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,887	$28.41	$0.77	-0.4	-23.7
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,354	$42.85	$1.17	-0.4	-10.1
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,249	$41.82	$1.14	-0.4	-8.1
	Pratt, KS	Eagle Pass, TX	UP	Shuttle	$4,483	$44.12	$1.20	-0.4	-5.6

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).

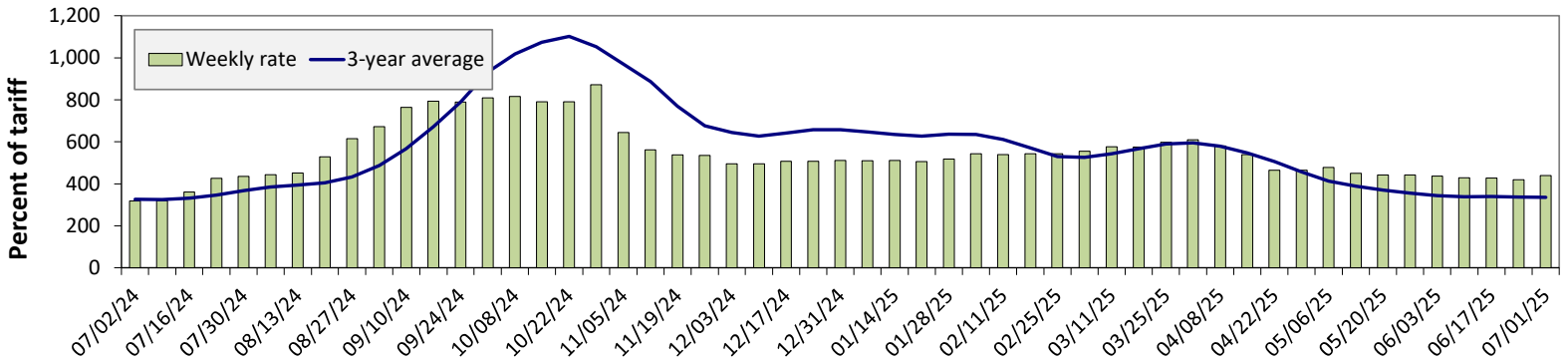
Figure 9. Railroad fuel surcharges, North American weighted average



July 2025: $0.17/mile, down 1 cent from last month’s surcharge of $0.18/mile; down 6 cents from the July 2024 surcharge of $0.23/mile; and down 20 cents from the July 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 July 1: 5 percent higher than the previous week; 39 percent higher than last year; and 31 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

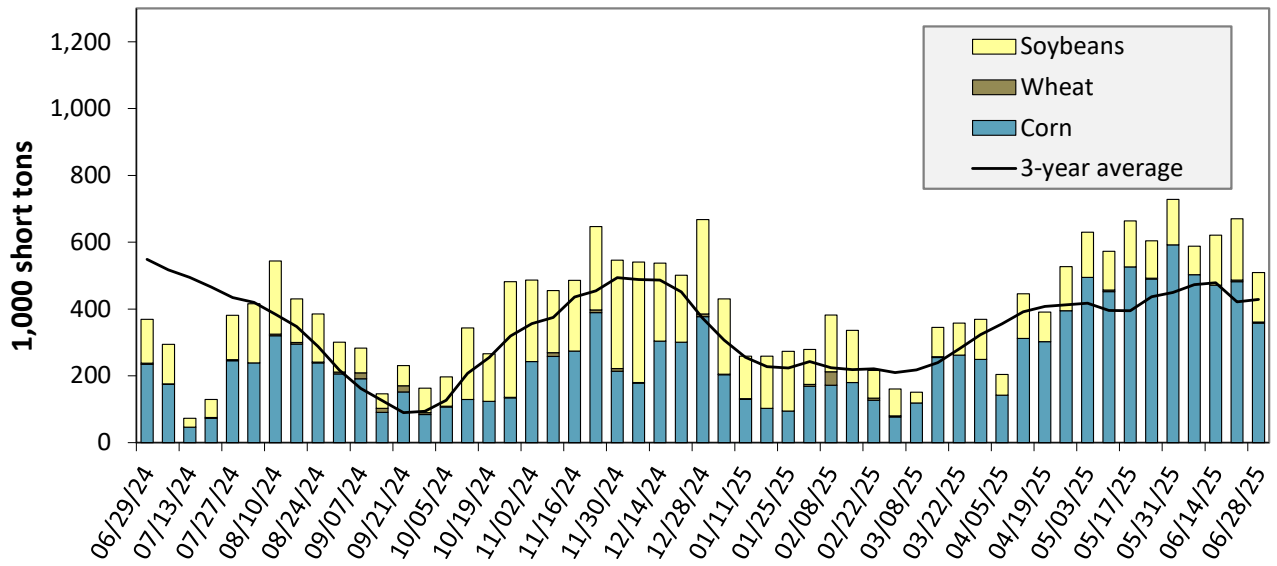
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	7/1/2025	573	473	440	315	322	278
	6/24/2025	556	463	418	334	324	281
$/ton	7/1/2025	35.47	25.16	20.42	12.57	15.10	8.73
	6/24/2025	34.42	24.63	19.40	13.33	15.20	8.82
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	41	35	39	46	32	37
	3-year avg.	34	28	31	18	2	7
Rate	August	589	538	512	443	469	446
	October	769	721	713	690	706	681

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 28: 38 percent higher than last year and 19 percent higher than the 3-year average.

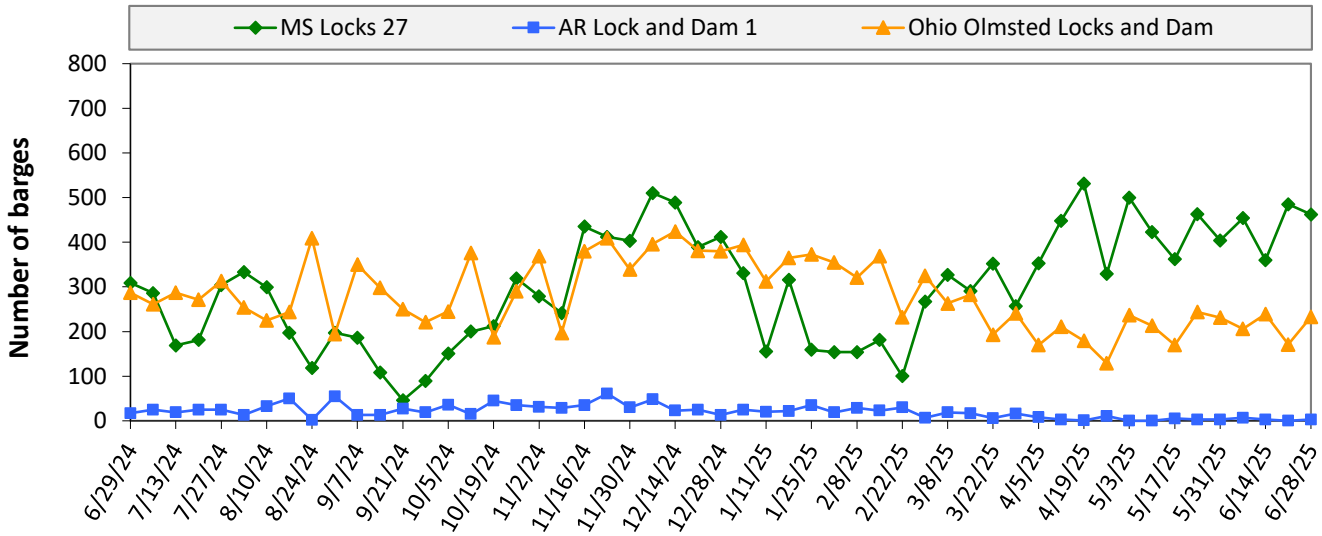
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 06/28/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	179	3	100	0	282
Mississippi River (Winfield, MO (L25))	294	3	122	0	419
Mississippi River (Alton, IL (L26))	398	3	156	0	557
Mississippi River (Granite City, IL (L27))	358	3	148	0	509
Illinois River (La Grange)	134	0	33	0	167
Ohio River (Olmsted)	30	8	14	0	52
Arkansas River (L1)	0	16	1	0	17
Weekly total - 2025	388	27	163	0	577
Weekly total - 2024	299	75	155	0	530
2025 YTD	10,459	528	5,225	108	16,320
2024 YTD	7,094	821	5,504	140	13,558
2025 as % of 2024 YTD	147	64	95	77	120
Last 4 weeks as % of 2024	189	70	115	20	152
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.

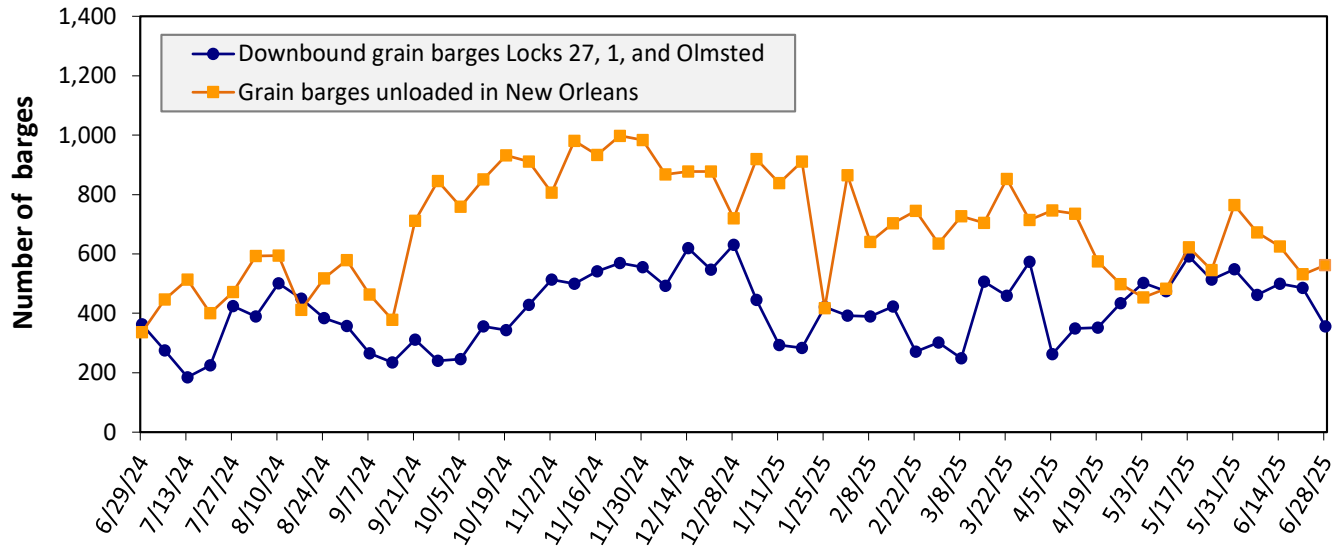
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending June 28: 698 barges transited the locks, 42 barges more than the previous week, and 35 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 28: 356 barges moved down river, 129 fewer than the previous week; 562 grain barges unloaded in the New Orleans Region, 6 percent more than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		July 2025	June 2025	July 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.92	$21.63	$20.95	4.6	5.4
	Central Ferry, WA/Almota, WA	$21.02	$20.73	$20.08	4.7	5.3
	Lyons Ferry, WA	$20.01	$19.72	$19.11	4.7	5.0
	Windust, WA/Lower Monumental, WA	$18.98	$18.69	$18.12	4.7	4.8
	Sheffler, WA	$18.95	$18.66	$18.09	4.7	4.8
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.75	$17.46	$16.94	4.8	4.4
	Port Kelly, WA/Wallula, WA	$17.53	$17.24	$16.73	4.8	4.3
	Umatilla, OR	$17.43	$17.14	$16.63	4.8	4.3
	Boardman, OR/Hogue Warner, OR	$17.17	$16.88	$16.38	4.8	4.2
	Arlington, OR/Roosevelt, WA	$17.01	$16.72	$16.23	4.8	4.1
	Biggs, OR	$15.68	$15.39	$14.95	4.9	3.7
	The Dalles, OR	$14.58	$14.29	$13.89	5.0	3.2

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))	296	0	296
Columbia River (Bonneville Lock and Dam (L1))	402	0	402
Monthly total 2025	402	0	402
Monthly total 2024	425	0	425
2025 YTD	1,730	0	1,730
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.

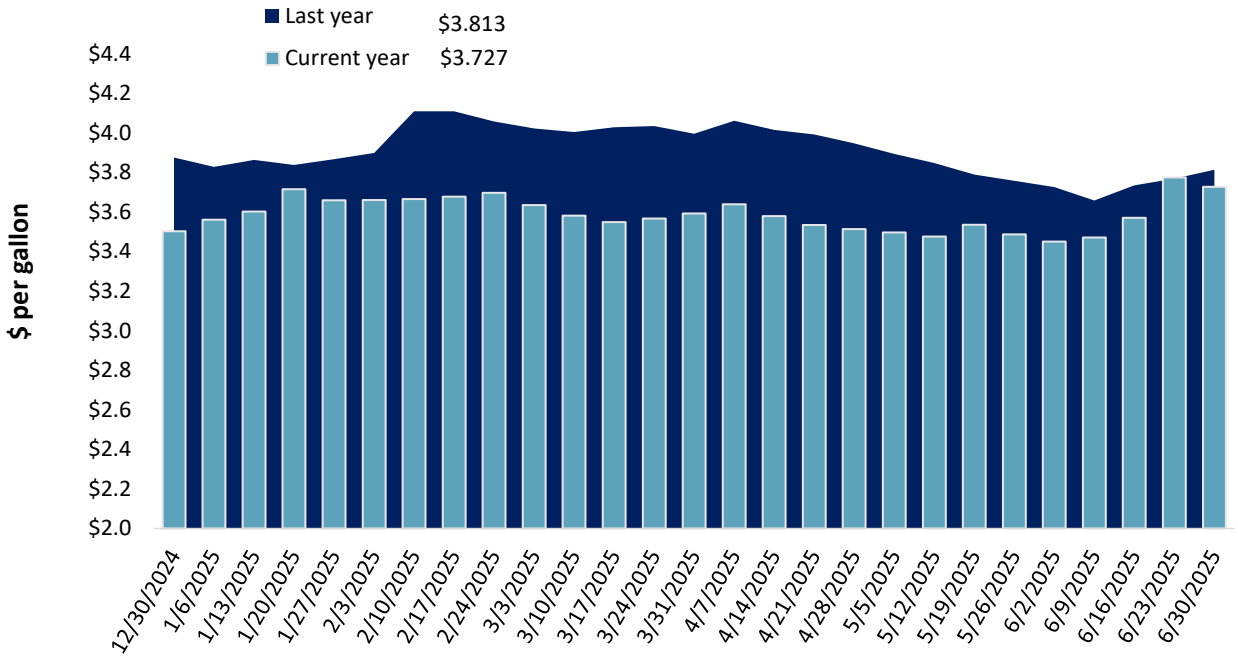
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 6/30/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.775	-0.015	-0.123
	New England	3.980	0.013	-0.116
	Central Atlantic	3.942	0.023	-0.134
	Lower Atlantic	3.691	-0.034	-0.121
II	Midwest	3.715	-0.062	-0.014
III	Gulf Coast	3.369	-0.067	-0.180
IV	Rocky Mountain	3.659	-0.030	-0.086
V	West Coast	4.421	-0.037	-0.026
	West Coast less California	4.035	-0.047	-0.004
	California	4.866	-0.027	-0.049
Total	United States	3.727	-0.048	-0.086

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 30, the U.S. average diesel fuel price decreased 4.8 cents from the previous week to $3.727 per gallon, 8.6 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 6/19/2025	2,199	1,097	1,642	830	88	5,857	12,816	3,864	22,537
	This week year ago	1,258	860	1,789	1,108	121	5,136	10,092	3,691	18,920
	Last 4 wks. as % of same period 2023/24	138	96	68	56	57	87	139	103	118
Current shipped (cumulative) exports sales	2024/25 YTD	343	64	201	125	4	736	54,759	45,610	101,104
	2023/24 YTD	240	93	307	318	0	958	43,286	40,811	85,054
	YTD 2024/25 as % of 2023/24	143	68	66	39	0	77	127	112	119
	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 6/19/2025	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	2,393	21,945	21,601	2	17,746
Japan	570	12,318	10,356	19	9,366
China	0	33	2,814	-99	8,233
Colombia	100	7,060	5,671	24	4,383
Korea	2	5,649	2,181	159	1,565
Top 5 importers	3,065	47,005	42,622	10	41,293
Total U.S. corn export sales	3,594	67,575	53,378	27	51,170
% of YTD current month's export projection	5%	100%	92%	-	-
Change from prior week	306	741	542	-	-
Top 5 importers' share of U.S. corn export sales	85%	70%	80%	-	81%
USDA forecast June 2025	67,949	67,314	58,220	16	-
Corn use for ethanol USDA forecast, June 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 6/19/2025	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	22,479	24,312	-8	28,636
Mexico	350	5,060	4,744	7	4,917
Japan	95	1,943	2,039	-5	2,231
Egypt	0	3,120	1,301	140	2,228
Indonesia	14	1,852	2,001	-7	1,910
Top 5 importers	459	34,453	34,397	0	39,922
Total U.S. soybean export sales	1,349	49,474	44,502	11	51,302
% of YTD current month's export projection	3%	98%	96%	-	-
Change from prior week	156	403	283	-	-
Top 5 importers' share of U.S. soybean export sales	34%	70%	77%	-	78%
USDA forecast, June 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 6/19/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25		
Mexico	1,248	1,030	21	3,358
Philippines	596	877	-32	2,473
Japan	606	510	19	2,045
China	0	68	-100	1,137
Korea	332	547	-39	1,674
Taiwan	299	232	29	935
Thailand	173	221	-22	667
Nigeria	239	79	204	629
Indonesia	214	142	51	518
Colombia	242	94	158	489
Top 10 importers	3,947	3,799	4	13,926
Total U.S. wheat export sales	6,592	6,094	8	19,135
% of YTD current month's export projection	29%	27%	-	-
Change from prior week	255	667	-	-
Top 10 importers' share of U.S. wheat export sales	60%	62%	-	73%
USDA forecast, June 2025	22,453	22,317	1	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (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.

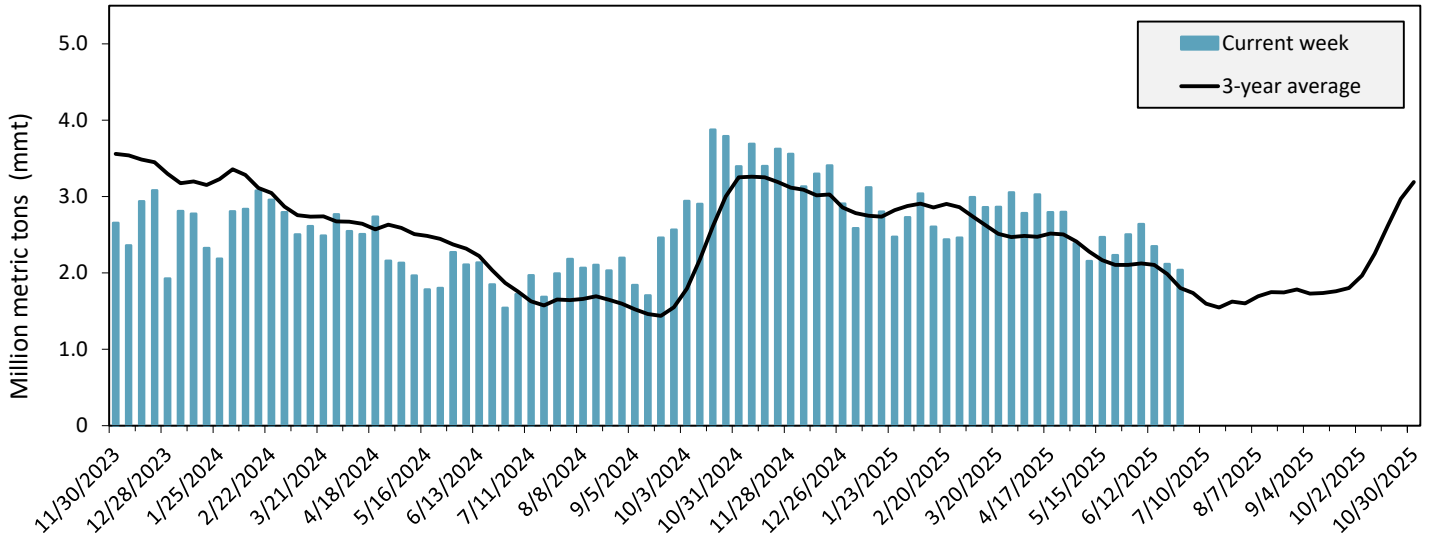
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 06/26/2025	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	451	408	110	12,729	9,668	132	114	155	13,987
	Soybeans	0	0	n/a	1,966	2,523	78	0	0	10,445
	Wheat	145	117	124	5,362	5,197	103	77	83	11,453
	All grain	607	525	116	20,163	18,473	109	99	118	37,186
Mississippi Gulf	Corn	654	759	86	19,081	12,969	147	161	148	27,407
	Soybeans	74	79	94	10,339	11,383	91	84	90	29,741
	Wheat	55	37	149	1,653	2,593	64	116	91	4,523
	All grain	784	875	90	31,072	27,000	115	139	131	61,789
Texas Gulf	Corn	0	11	4	158	260	61	143	120	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	146	82	178	1,927	775	249	247	267	1,940
	All grain	147	234	63	2,489	2,892	86	176	190	6,965
Interior	Corn	265	313	84	6,644	6,844	97	102	130	13,463
	Soybeans	147	120	122	3,312	3,564	93	108	126	8,059
	Wheat	67	19	362	1,438	1,467	98	71	89	2,952
	All grain	478	468	102	11,676	11,994	97	102	125	24,753
Great Lakes	Corn	0	0	n/a	21	0	n/a	n/a	354	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	20	0	n/a	125	165	76	74	104	653
	All grain	20	0	n/a	145	183	79	123	107	1,060
Atlantic	Corn	0	12	0	173	196	88	60	57	410
	Soybeans	4	3	118	459	435	106	189	19	1,272
	Wheat	1	0	n/a	34	11	309	81	12	73
	All grain	4	15	27	666	641	104	84	31	1,754
All Regions	Corn	1,370	1,504	91	38,806	29,937	130	132	146	56,109
	Soybeans	225	202	111	16,285	17,976	91	93	93	50,865
	Wheat	435	255	170	10,539	10,208	103	101	108	21,594
	All grain	2,040	2,117	96	66,315	61,236	108	119	127	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.

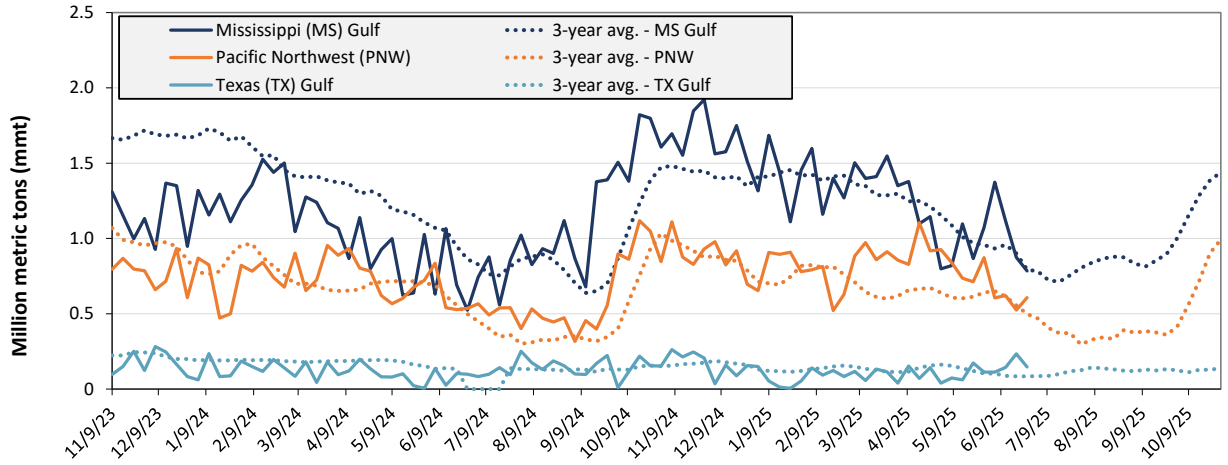
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jun. 26: 2 mmt of grain inspected, down 4 percent from the previous week, up 34 percent from the same week last year, and up 13 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 06/26/25 inspections (mmt):
MS Gulf: 0.78
PNW: 0.61
TX Gulf: 0.15

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 10	down 37	down 16	up 16
Last year (same 7 days)	up 81	up 50	up 75	up 11
3-year average (4-week moving average)	down 1	up 75	up 6	up 22

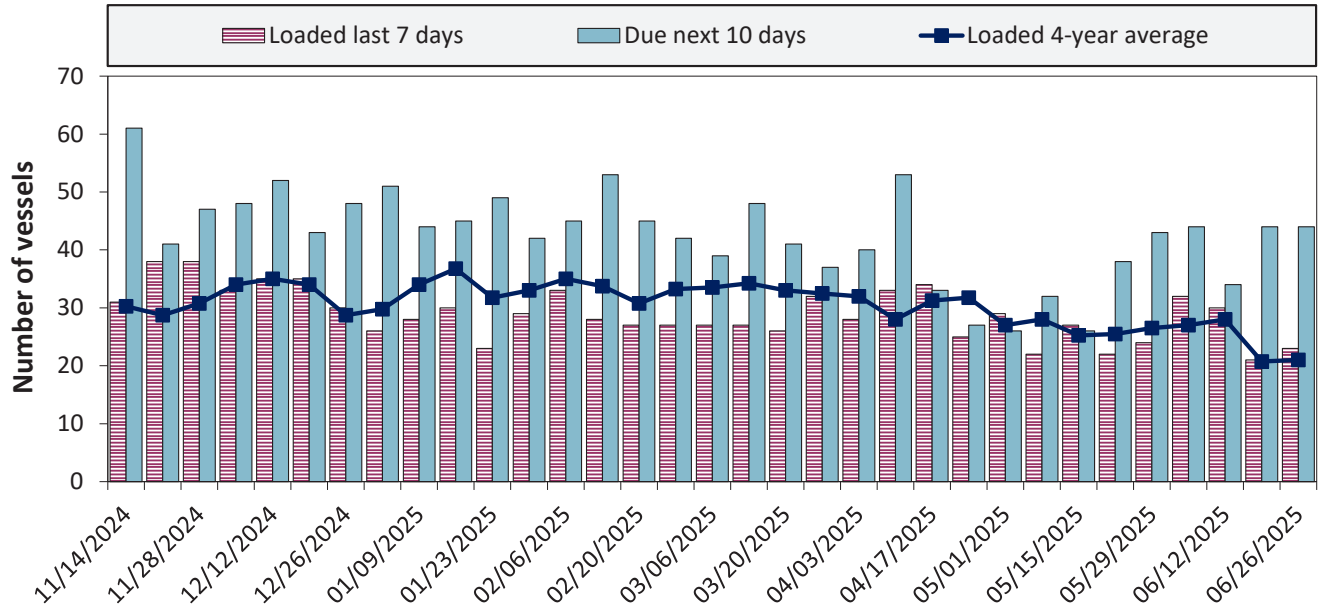
Source: USDA, Federal Grain Inspection Service.

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

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
6/26/2025	14	23	44	9
6/19/2025	16	21	44	n/a
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.

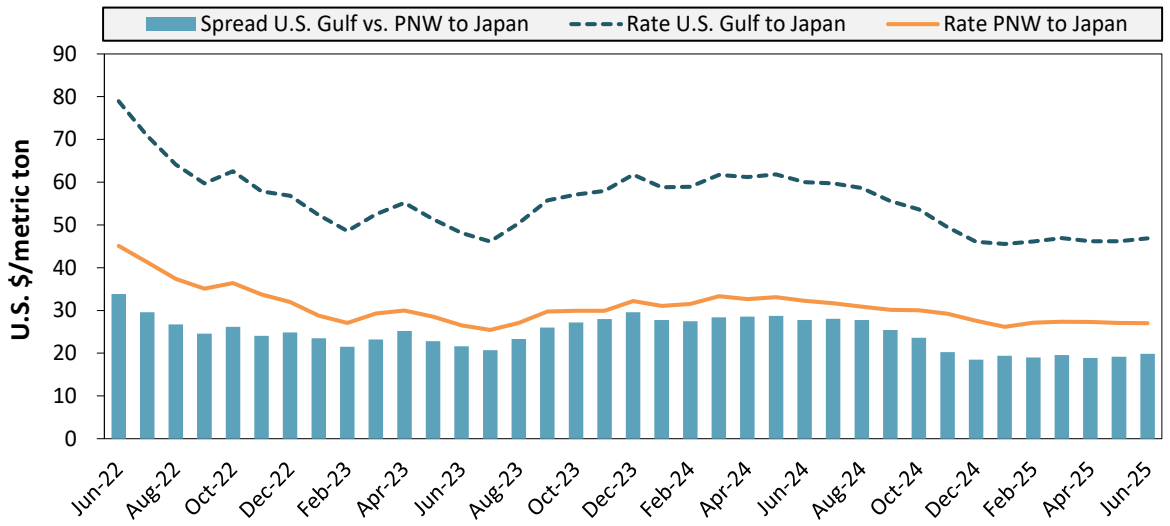
Figure 19. U.S. Gulf vessel loading activity



Week ending 06/26/25, number of vessels	Loaded	Due
Change from last year	28%	-2%
Change from 4-year average	10%	9%

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
June 2025	$46.88	$27.00	$19.88
Change from June 2024	-22%	-16%	-28%
Change from 4-year average	-27%	-25%	-30%

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

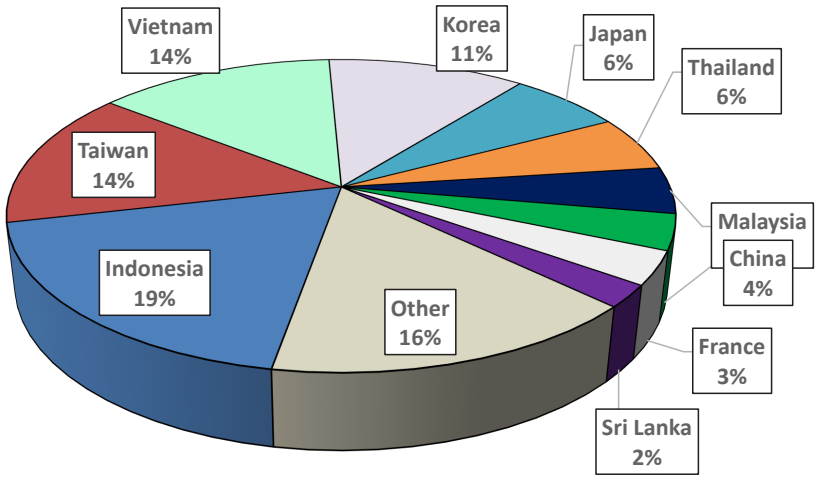
Table 20. Ocean freight rates for selected shipments, week ending 6/28/2025

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	S. Korea	Heavy grain	Jun 23, 2025	Jul 1/10, 2025	58,000	55.50
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 23, 2025	Jul 20/30, 2025	63,000	34.00
Brazil	China	Heavy grain	Jun 23, 2025	Jul 11/15	63,000	34.75
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	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.

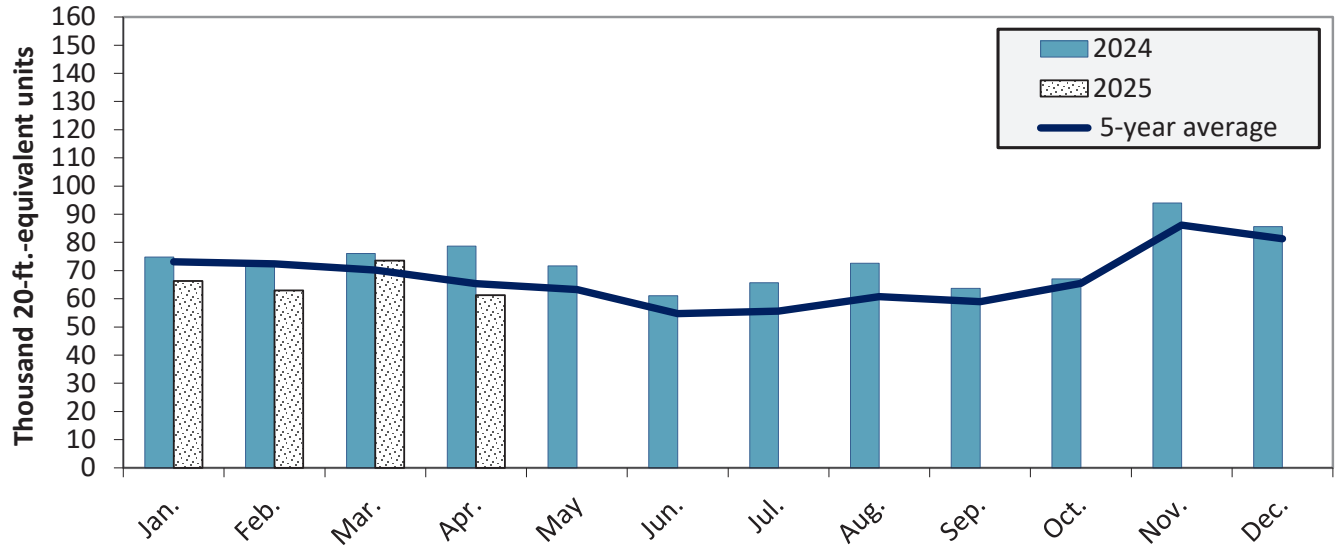
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 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 Apr. 2025 were down 22.1 percent from last year and down 6.1 percent from the 5-year average.

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.
Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

Title	Name	Email	Phone
Coordinators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Maria Williams	maria.williams@usda.gov	(202) 690-4430
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Grain Transportation Indicators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
Rail Transportation	Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690-1144
	Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690-3244
	Austin Hunt	austin.hunt@usda.gov	(540) 681-2596
Barge Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Edmund Outlaw	edmund.outlaw@usda.gov	(301) 448-0578
Truck Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
Grain Exports	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Ocean Transportation	Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Jesse Gastelle (Container movements)	jesse.gastelle@usda.gov	(202) 690-1144
Editor	Maria Williams	maria.williams@usda.gov	(202) 690-4430
Visual Information Specialists	Jessica Ladd	jessica.ladd@usda.gov	n/a
	Sharon C. Williams	sharonc.williams@usda.gov	(202) 720-2848

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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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