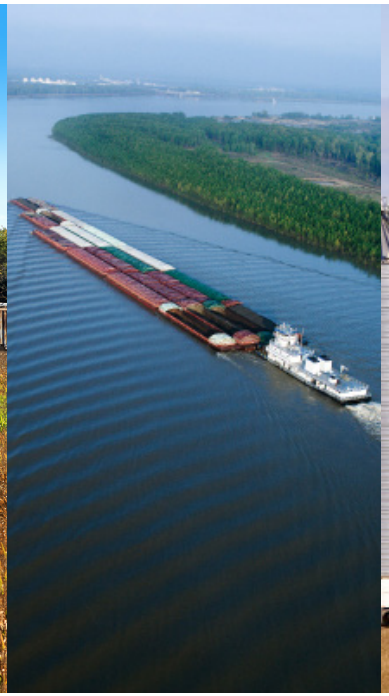
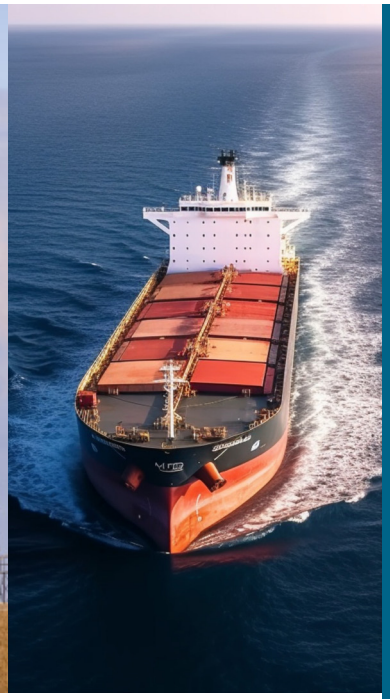
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

August 14, 2025
A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

USDA Projects Record Corn Crop for MY 2025/26. According to USDA's August *World Agricultural Supply and Demand Estimates report*, U.S. farmers are projected to harvest 16.7 billion bushels (bbu) of corn in marketing year (MY) 2025/26. If realized, this total would be an all-time record, and it would exceed the prior record (from MY 2023/24) by 1.4 bbu.

State-level estimates of the MY 2025/26 corn crop are available in the *August Crop Production* report from USDA's National Agricultural Statistics Service. Iowa is projected to harvest 2.9 bbu of corn in MY 2025/26—0.4 bbu above the prior 5-year average. Besides Iowa—Minnesota, Nebraska, North Dakota, and South Dakota are each projected to harvest amounts in excess of 0.2 bbu above the prior 5-year average. All States—except for Pennsylvania and New York—are expected to harvest more corn in MY 2025/26 than the prior 5-year average.

USDA projects that the United States will export a record 2.9 bbu of corn in MY 2025/26, reflecting abundant corn supplies. Record corn supplies and exports will raise the demand for grain transportation.

Rail Service Challenges Persist on CPKC's Network. Following a computer system cutover back in May, Canadian Pacific Kansas City (CPKC) has had service challenges—particularly in the legacy Kansas City Southern Railway regions (*Grain Transportation Report (GTR), June 19, 2025, first highlight*).

CPKC's weekly service metrics for grain shipments reveal the firm's persistent service challenges. For the week ending August 1, CPKC's daily average for grain cars not moved in over 48 hours was 1,869—68 percent of the national total (GTR table 4b).

Similarly, over the last 4 weeks, CPKC's grain unit train speeds have averaged 15.3 miles per hour—29 percent below the average of all Class I railroads. Also, over the past 4 weeks, origin dwell times for CPKC's grain unit trains have averaged 38.4 hours—76 percent above the average of all Class I railroads (GTR table 4a).

CN Updates Grain Rail Tariff Rates to Gulf Export Terminals. Canadian National Railway (CN) recently announced updated rail tariff rates for shipments of corn and soybeans to export terminals in the U.S. Gulf. These updates will be reflected in GTR table 7 beginning next month.

From Gibson City, IL, the current CN rail tariff rate to U.S. Gulf export terminals (using railroad-supplied equipment) is $2,461 per car. In September, the rate will rise to $2,571 per car. For October - November, the rate will rise again to $3,011 per car. For December 2025 - August 2026, the rate will fall to $2,681 per car. However, these rates could change before they go into effect.

In Illinois, CN competes with barge operators to ship corn and soybeans to U.S. Gulf export terminals. The barge rate for November (i.e., 3-month forward rate) on the Illinois River is currently $29.14 per ton (GTR table 9). The $3,011 per car rail freight rate in November is about $27.13 per ton.

DOT Requests Feedback on Strategic Plan. The Department of Transportation (DOT) requests the public's input to help develop DOT's strategic plan for fiscal years (FY) 2026-30. Although comments are due today (August 14), DOT will consider comments filed later, to the extent practicable.

Commenters are asked to address the following questions: What strategies or priorities should DOT adopt to improve the Nation's transportation systems? How should DOT measure progress toward the priorities suggested in the previous question? What emerging challenges or opportunities in transportation warrant additional DOT activities, investments, research, or analysis? How can DOT best create value for its activities with stakeholders?

DOT anticipates that the final DOT Strategic Plan for FY 2026-30 will be posted on the DOT website around February 2026. Comments can be filed at www.regulations.gov by searching Docket No. DOT-OST-2025-0963.

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 July 31, **unshipped balances** of corn and soybeans totaled 11.34 million metric tons (mmt), down 10 percent from last week and up 25 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 6.39 mmt, up 1 percent from last week and up 23 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 0.17 mmt, down 50 percent from last week. Net **soybean export sales** were 0.47 mmt, up 71 percent from last week. Net **wheat export sales** for MY 2025/26 were 0.74 mmt, up 25 percent from last week.

Rail

U.S. Class I railroads originated 26,594 **grain carloads** during the week ending August 2. This was a 2-percent decrease from the previous week, 33 percent more than last year, and 29 percent more than the 3-year average.

Average August **shuttle secondary railcar bids/offers** (per car) were $133 below tariff for the week ending August 7. This was $87 less than last week and $315 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $75 above tariff. This was $75 more than last week and $125 lower than this week last year.

Barge

For the week ending August 9, **barged grain movements** totaled 852,550 tons. This was 10 percent more than the previous week and 8 percent more than the same period last year.

For the week ending August 9, 550 grain barges **moved down river**—26 more than last week. There were 580 grain barges **unloaded** in the New Orleans region, 27 percent fewer than last week.

Ocean

For the week ending August 7, 29 **oceangoing grain vessels** were loaded in the Gulf—45 percent more than the same period last year. Within the next 10 days (starting August 8), 33 vessels were expected to be loaded—3 percent more than the same period last year.

As of August 7, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $54.00, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $28.75 per mt, unchanged from the previous week.

Fuel

For the week ending August 11, the **U.S. average diesel fuel price** decreased 4.6 cents from the previous week to $3.754 per gallon, 5.0 cents above the same week last year.

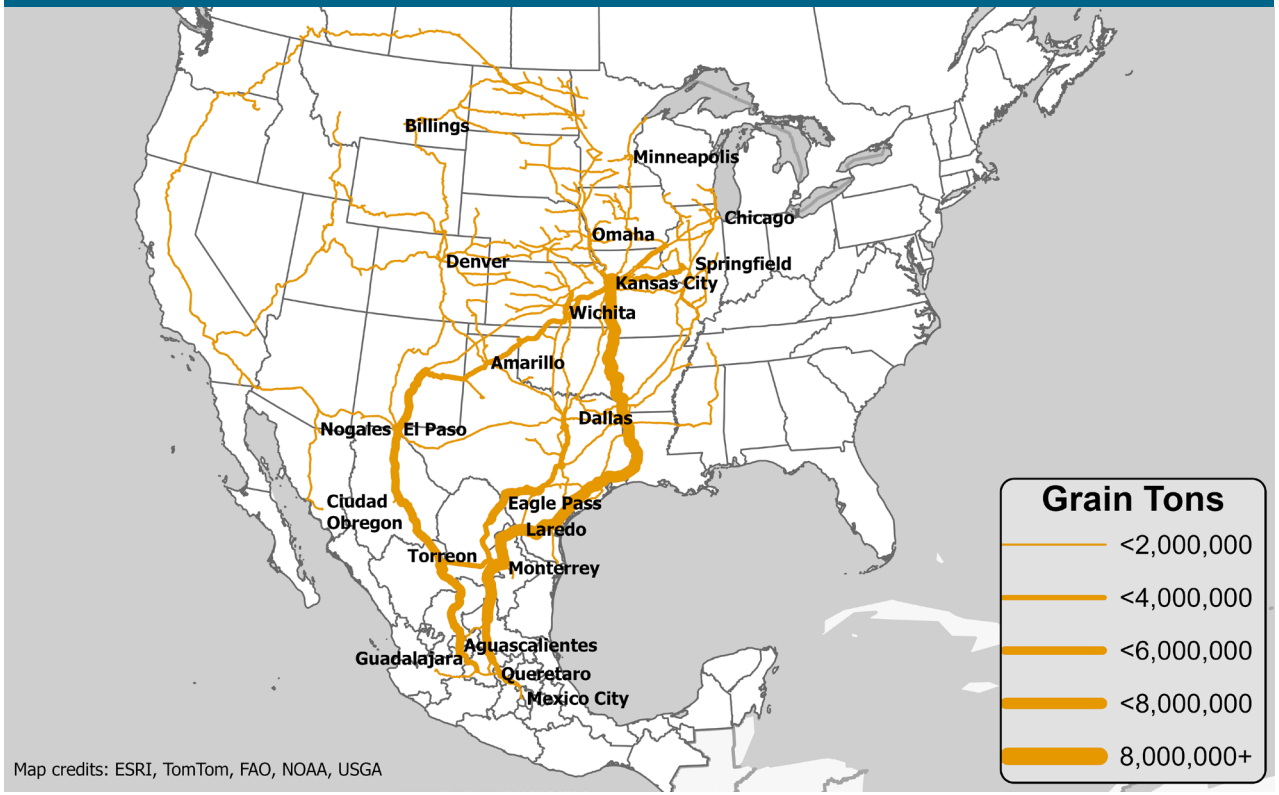
Update to GTR Rail Tariff Rates for Grain Shipments to Mexico

This week, USDA's Agricultural Marketing Service (AMS) released a new **U.S. Grain Rail Exports to Mexico Dashboard** on USDA's **Agricultural Transportation Open Data platform** (AgTransport). The dashboard highlights recent rail exports to Mexico using inspections data, shows maps of annual grain rail flows across the border, and provides an interactive map of U.S.-to-Mexico-border tariff rail rates.

A top buyer of U.S. grain, Mexico was the leading destination, on average, for U.S. corn and wheat exports and the second-largest destination for soybean exports (behind China), from 2014 to 2024. These substantial purchases owe mainly to Mexico's proximity to the United States and low transportation costs—particularly, rail.

This article provides background on U.S. grain exports (i.e., corn, soybeans, and wheat) to Mexico—including mapping of the major routes—as well as an analysis of the U.S.-Mexico rail rate data. All the article's figures are visualizations drawn from the new **AgTransport dashboard**.

Figure 1. U.S. grain (corn, soybeans, and wheat) rail export flows to Mexico (2023)



Source: USDA/Agricultural Marketing Service analysis of data from the U.S. Surface Transportation Board and Bureau of Transportation Statistics, and Mexico's Agencia Reguladora del Transporte Ferroviario.

Background

The U.S. rail network interchanges directly with the Mexican rail network at multiple border crossings—allowing grain shuttle/unit trains to travel directly to end users in Mexico. From 2019 to 2024, of all U.S. grain exports to Mexico, 67 percent traveled overland (almost exclusively by rail) and 33 percent, by ocean (primarily from New Orleans, LA). Of the overland grain exports—nearly all (97 percent) traveled through three border crossings in Texas: Eagle Pass, El Paso, and Laredo.

Based on analysis of **grain inspections data** from USDA's Federal Grain Inspections Service from 2019 to 2024, the top origins for corn exports (by rail) to Mexico were Illinois (32 percent); Iowa (19 percent); Kansas (17 percent); and Nebraska (15 percent). The top origins of soybean exports to Mexico were Nebraska (27 percent); Missouri (25 percent); Kansas (20 percent); and Iowa (15 percent). The top origins of wheat exports to Mexico were Kansas (42 percent); North Dakota (19 percent); Oklahoma (12 percent); and Texas (8 percent).

Three U.S. Class I railroads interchange with Mexican railroads at the U.S.-Mexico border: BNSF Railway (BNSF); Canadian Pacific Kansas

City (CPKC); and Union Pacific Railroad (UP). BNSF has access to the El Paso border crossing and the Eagle Pass border crossing (through trackage rights). CPKC has access to the Laredo border crossing. UP has access to all three border crossings.

Within Mexico, two Mexican railroads receive U.S. imports of grain. Ferromex connects with BNSF and UP at the El Paso and Laredo border crossings, and Kansas City Southern de Mexico (KCSM)—a subsidiary of CPKC—interchanges with CPKC and UP at the Laredo border crossing. Following a crew change and Mexican government inspection at the U.S.-Mexico border, each train is carried by the Mexican railroads to deliver its U.S. grain shipments to end users.

Figure 1 shows 2023 U.S.-to-Mexico grain flows on the North American rail network. The map is based on a combination of U.S.-origin-to-the-border data from the Surface Transportation Board's confidential Carload Waybill Sample and from-the-border-to-Mexico-destination data from Mexico's Agencia Reguladora del Transporte Ferroviario (ARTF). The origin-destination data is routed along the Bureau of Transportation Statistics' North American Rail network using the shortest path on the originating railroad's network.

Corn shipments primarily traverse the U.S.-Mexico border at Laredo, and after being handed off to KCSM, they travel to Mexican livestock operations—primarily in the Monterrey region, as well as further south in Queretaro and Mexico City. Most soybeans traverse the border at Eagle Pass. From Eagle Pass, Ferromex moves the soybean shipments to soybean crush facilities near Monterrey. Although wheat shipments pass through all three border crossings, they utilize the El Paso crossing at a greater rate than corn or soybeans do. Within Mexico, wheat shipments travel farther south than corn or soybeans—to flour mills and food manufacturers. Additional maps specific to corn, soybeans, and wheat are available on the new AgTransport dashboard.

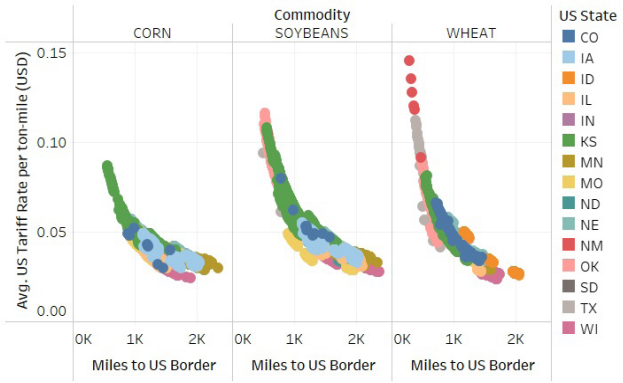
Analysis of Rail Rates to Mexico

In January 2022, because of a new Mexican tax, U.S. railroads stopped publishing tariff rates for the complete "through" shipment from a U.S. origin to a Mexican destination. Instead, the railroads began reporting rates only to the U.S.–Mexico border.

In 2024, the *Grain Transportation Report* (GTR) updated GTR table 8, which includes rail tariff rates plus fuel surcharges to the U.S.–Mexico border (GTR, July 4, 2024, first highlight). Table 8 shows rates for select U.S. origins in the latest month, and a larger dataset (with additional routes and shipment types) is available on AgTransport.

To-the-border tariff rates are collected from BNSF, UP, and CPKC monthly. The dataset allows shippers to benchmark their rates against other rates—by origins, border crossings, railroads, and commodities. Figure 2 sheds light on some of the factors behind the variation in rates.

Figure 2A: Variation in average large car, long-train to-the-border rates per ton-mile across commodities, distance, and origin States (2025)



Note: Two origins in southern Texas with very short distances were excluded from the visuals to enhance the variation seen across other rates.
Source: USDA/Agricultural Marketing Service analysis of public tariff data from BNSF, Union Pacific, and CPKC.

Railroading involves high fixed costs to operate, but relatively low variable costs to run an extra train or ship an extra mile. For longer shipments, railroads' high fixed costs get spread over more miles, so the per ton rate is lower. Figure 2A clearly shows this relationship between distance and the rate per ton-mile. Figure 2B highlights the correlations among rates whose origins are near each other.

Notably, rates still vary at any given distance. For instance, Wisconsin (pink) and Missouri (gold) show up in figure 2A as having lower rates than other nearby origins—likely, partly, because of competition with barge transportation on the Mississippi River. Figure 2B shows shipments originating near the river as having relatively low rates for their latitude.

Tracking rates over time, figure 2C shows average tariff rates from February 2022 to August 2025. Corn and soybean rates have increased, on average, since data collection started in 2022. In contrast, wheat rates have fallen, on average—possibly reflecting the impacts of the 2023 CPKC merger.

Another factor influencing rates is the competition between BNSF and UP for Mexico traffic. In September, BNSF is set to lower nearly all soybean tariff rates to Mexico by $1,000 per car (GTR, August 7, 2025). UP is lowering soybean tariff rates to Mexico by $900-$1,300 per car.

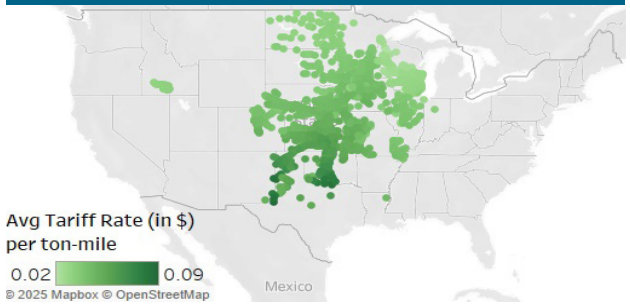
Currently, most BNSF corn tariff rates to Mexico are the same rates as to Texas Panhandle feedlots (near Hereford, TX). However, beginning in October, BNSF will institute a $200 premium—over the Hereford, TX, rate—for shipping corn to Mexico. Although tariff rates to Hereford are set to drop in October, the $200 premium ensures that rates to Mexico will not change for most of BNSF's originating elevators. Still, 13 elevators will see a rate increase of less than $260, and 33 elevators will see a decrease of up to $400 (GTR, July 24, 2025). In October, for most stations, UP will lower corn tariff rates by $150 per car.

Conclusion

USDA's AgTransport now affords more insights into railed grain exports to Mexico—offering new data on grain tariff rates to the Mexico border and a dashboard containing maps of grain traffic flows to Mexico and interactive visualizations of tariff rates. This timely, transparent information supports exporters in securing competitive rates, helping to keep U.S. grain competitive with the rest of the world.

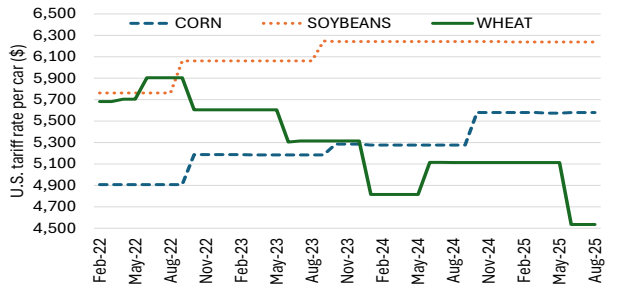
Jesse.Gastelle@usda.gov
PeterA.Caffarelli@usda.gov
Austin.Hunt@usda.gov

Figure 2B: Average rail tariff rates by U.S. origin (2025)



Note: Two origins in southern Texas with very short distances were excluded from the visuals to enhance the variation seen across other rates.
Source: USDA/Agricultural Marketing Service analysis of public tariff data from BNSF, Union Pacific, and CPKC.

Figure 2C: Average to-the-border tariff rates by commodity (2022-25)



Note: Two origins in southern Texas with very short distances were excluded from the visuals to enhance the variation seen across other rates.
Source: USDA/Agricultural Marketing Service analysis of public tariff data from BNSF, Union Pacific, and CPKC.

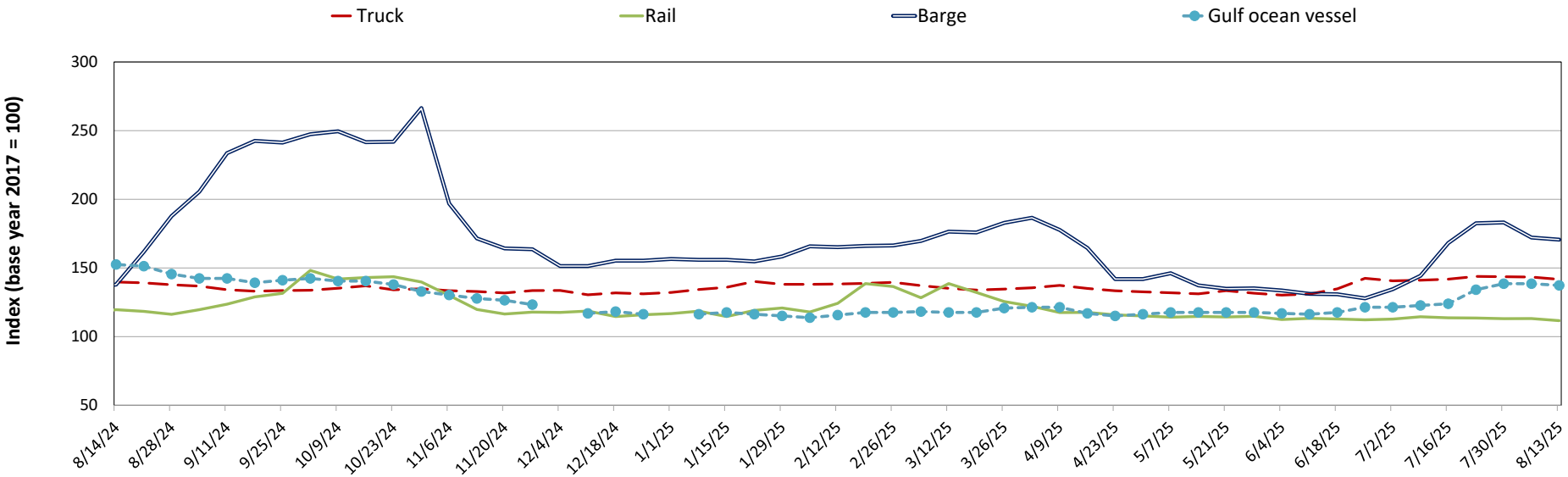
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
08/13/25	142	112	171	137	137
08/06/25	143	113	172	139	137
08/14/24	140	120	138	153	148

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.

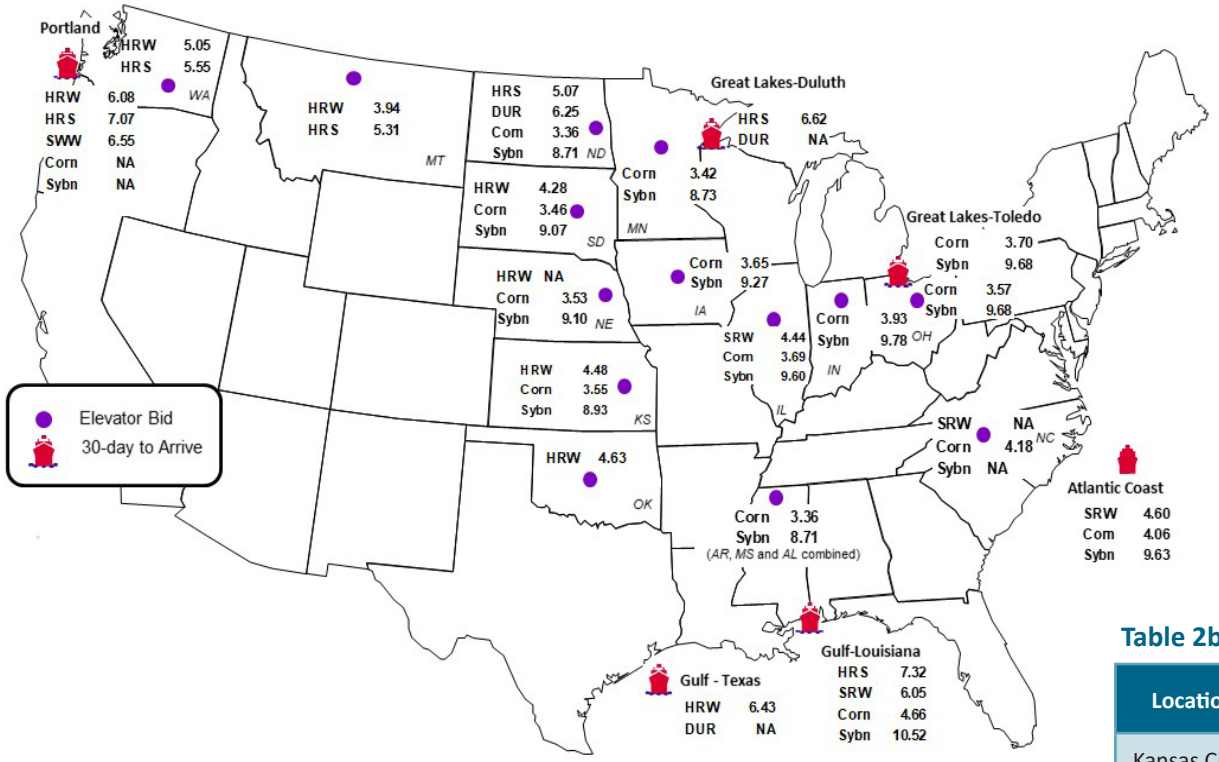
Figure 1. Grain transportation cost indicators as of week ending 8/13/25



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	8/8/2025	8/1/2025
Corn	IL–Gulf	-0.97	-0.93
Corn	NE–Gulf	-1.13	-1.11
Soybean	IA–Gulf	-1.25	-1.11
HRW	KS–Gulf	-1.95	-1.99
HRS	ND–Portland	-2.00	-1.96

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	8/8/2025	Week ago 8/1/2025	Year ago 8/9/2024
Kansas City	Wheat	Sep	5.180	5.186	5.422
Minneapolis	Wheat	Sep	5.768	5.723	5.896
Chicago	Wheat	Sep	5.144	5.168	5.304
Chicago	Corn	Sep	4.056	4.106	3.940
Chicago	Soybean	Sep	9.874	9.892	9.972

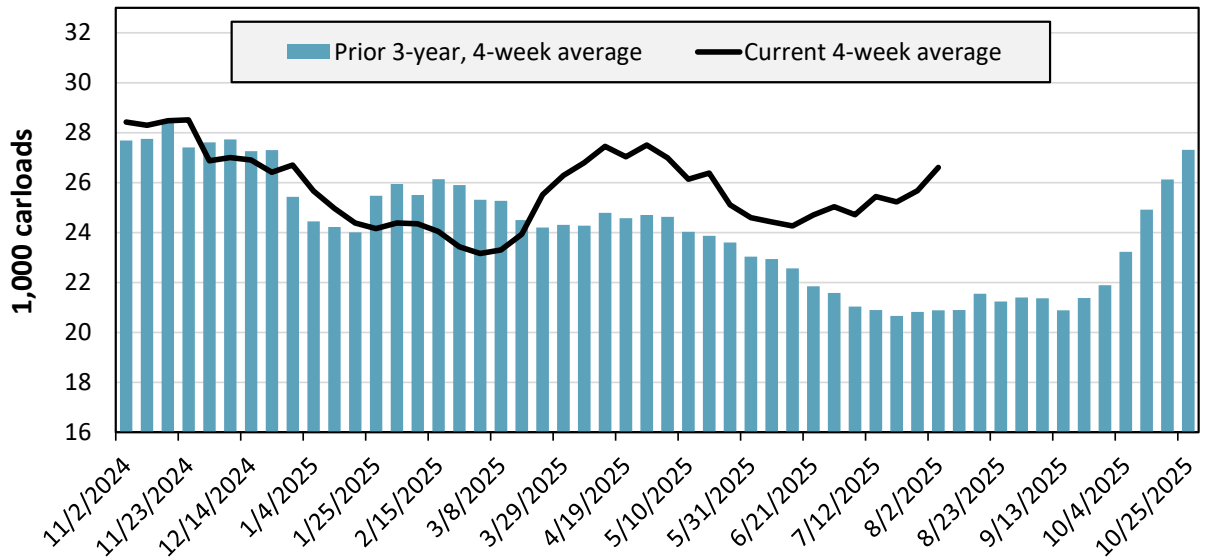
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/02/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,434	2,413	11,585	6,125	3,445	1,592	26,594
This week last year	1,752	2,418	8,619	4,233	2,168	851	20,041
2025 YTD	49,366	87,156	340,178	178,896	84,474	43,590	783,660
2024 YTD	51,472	82,376	321,432	158,003	83,645	28,671	725,599
2025 YTD as % of 2024 YTD	96	106	106	113	101	152	108
Last 4 weeks as % of 2024	81	103	119	125	121	160	117
Last 4 weeks as % of 3-yr. avg.	90	106	135	126	148	140	127
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 August 2, grain carloads were up 4 percent from the previous week, up 17 percent from last year, and up 27 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: 8/1/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	41.9	31.2	15.4	17.2	7.2	40.1	25.5
	Average over last 4 weeks	28.6	22.8	15.1	16.2	9.6	38.4	21.8
	Average of same 4 weeks last year	24.3	30.8	30.8	17.0	9.7	n/a	22.5
Average grain unit train speeds (miles per hour)	This week	22.5	19.5	24.0	22.2	25.3	16.3	21.6
	Average over last 4 weeks	23.1	19.8	24.4	22.4	24.0	15.3	21.5
	Average of same 4 weeks last year	23.5	20.7	24.1	22.4	25.0	n/a	23.2

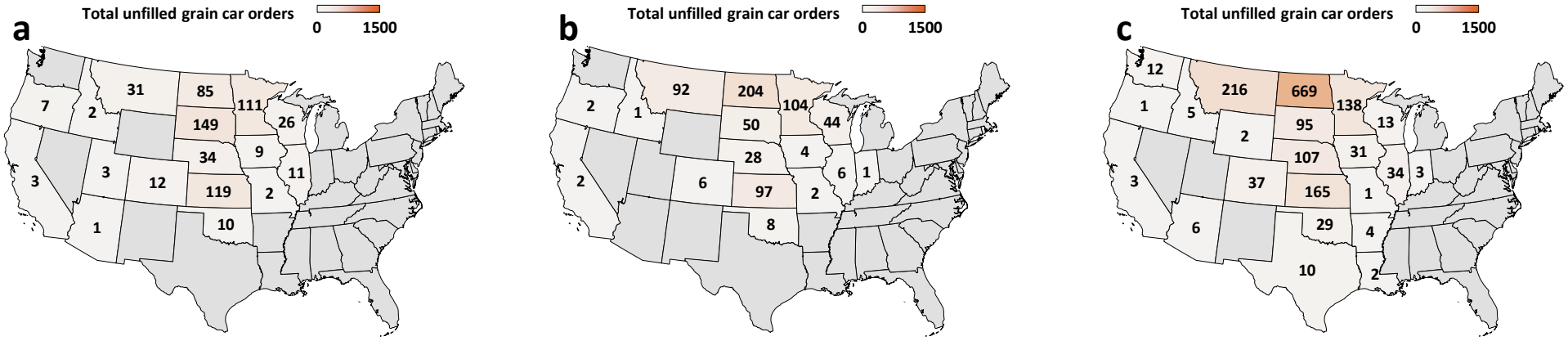
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 8/1/2025		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	13	8	255	56	8	489	828
	Average over last 4 weeks	16	11	238	64	11	351	691
	Average of same 4 weeks last year	13	9	519	117	6	n/a	663
Average number of loaded grain cars not moved in over 48 hours	This week	24	170	271	73	14	1,380	1,932
	Average over last 4 weeks	31	182	289	62	17	905	1,484
	Average of same 4 weeks last year	18	159	813	81	5	n/a	1,076
Average number of grain unit trains held	This week	0	0	4	5	0	6	15
	Average over last 4 weeks	0	0	4	5	0	7	16
	Average of same 4 weeks last year	0	0	24	6	0	n/a	31
Total unfilled manifest grain car orders	This week	0	0	297	204	0	150	651
	Average over last 4 weeks	1	0	323	131	0	218	673
	Average of same 4 weeks last year	4	0	1,137	219	1	n/a	1,362

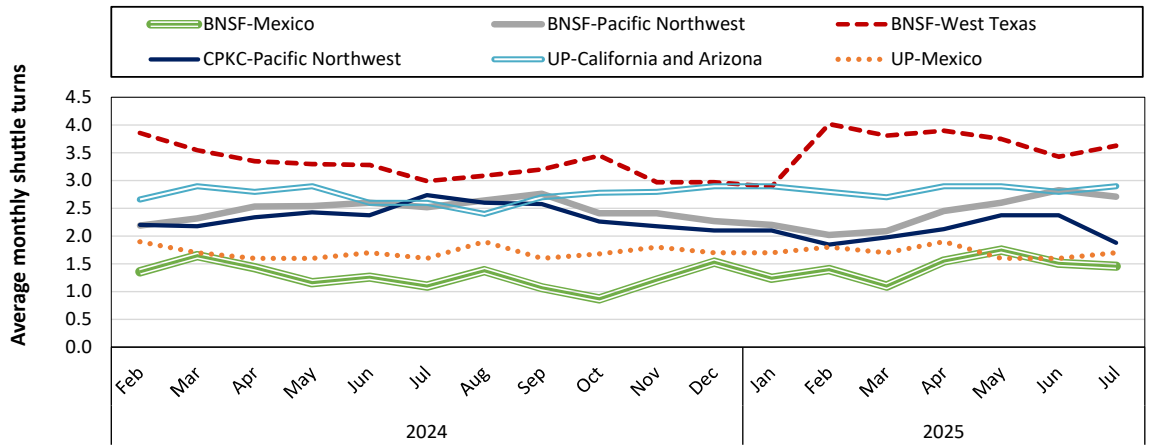
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 8/1/2025 (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

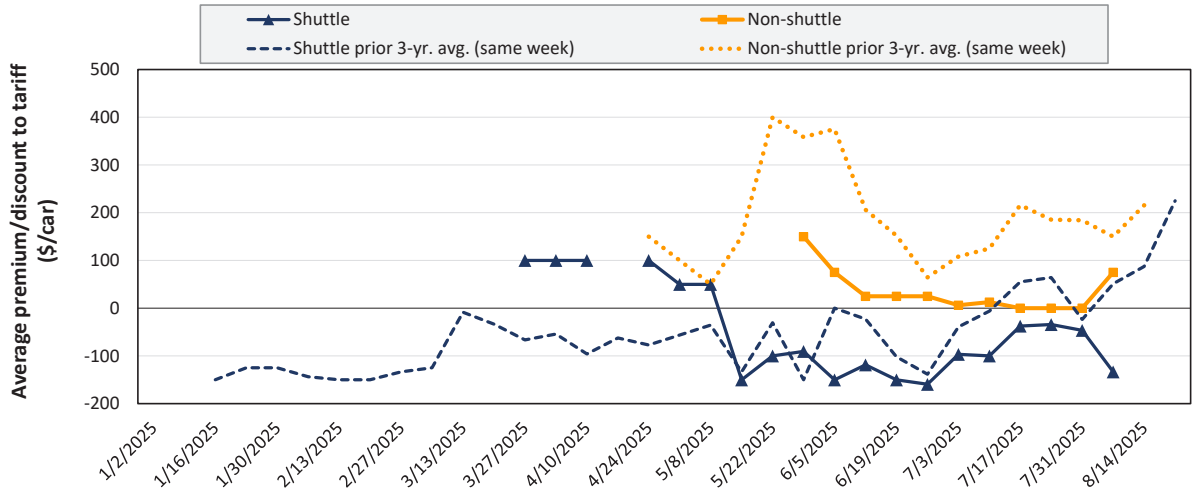


In July 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 1.9 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to 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 August 2025



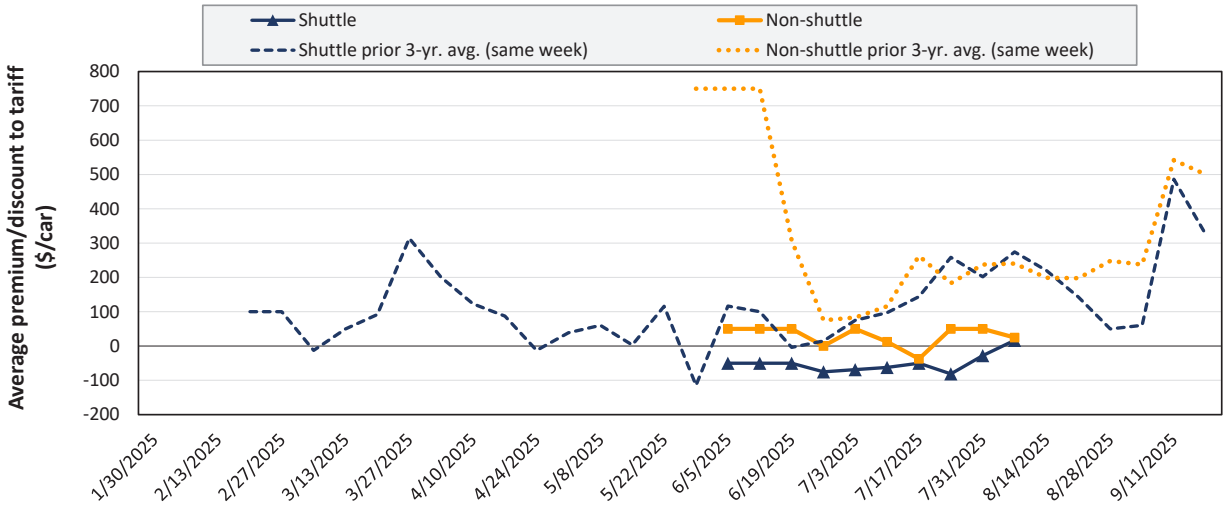
Average non-shuttle bids/offers rose $75 this week, and are $75 below the peak.

Average shuttle bids/offers fell $87 this week and are $233 below the peak.

8/7/2025	BNSF	UP
Non-Shuttle	$75	n/a
Shuttle	-$100	-$167

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 September 2025



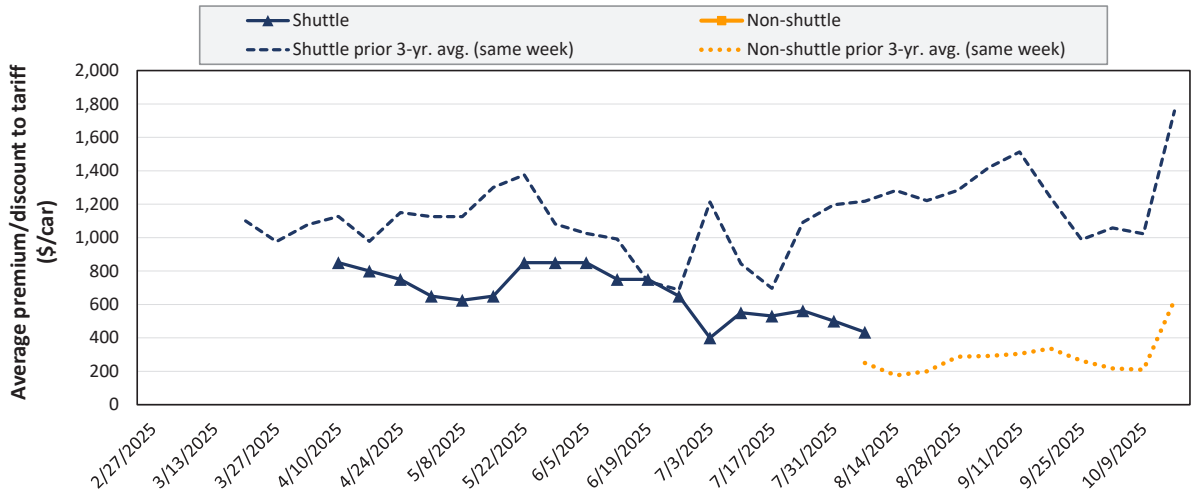
Average non-shuttle bids/offers fell $25 this week, and are $25 below the peak.

Average shuttle bids/offers rose $45 this week and are at the peak.

8/7/2025	BNSF	UP
Non-Shuttle	$125	-$75
Shuttle	$54	-$21

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 October 2025



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

Average shuttle bids/offers fell $66 this week and are $416 below the peak.

8/7/2025	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$569	$300

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: 8/7/2025		Delivery period					
		Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
Non-shuttle	BNSF	75	125	n/a	n/a	n/a	n/a
	Change from last week	-25	-25	n/a	n/a	n/a	n/a
	Change from same week 2024	-125	-175	n/a	n/a	n/a	n/a
	UP	n/a	-75	n/a	n/a	n/a	n/a
	Change from last week	n/a	-25	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-194	n/a	n/a	n/a	n/a
Shuttle	BNSF	-100	54	569	700	n/a	n/a
	Change from last week	-100	73	-131	0	n/a	n/a
	Change from same week 2024	-388	-367	-481	n/a	n/a	n/a
	UP	-167	-21	300	n/a	n/a	n/a
	Change from last week	-74	17	0	n/a	n/a	n/a
	Change from same week 2024	-242	-227	-250	n/a	n/a	n/a
	CPKC	n/a	100	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	200	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, August 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	$5,832	$83.09	$5,915.09	$1.60	$58.74	2.4
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,291	$42.77	$4,333.77	$1.17	$43.04	4.1
	CPKC	Westby, MT	St. Louis, MO	Unit	$5,788	$500.22	$6,288.22	$1.70	$62.45	2.9
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,804	$49.77	$4,853.77	$1.31	$48.20	3.5
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,215	$105.07	$6,320.07	$1.71	$62.76	2.0
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,865	$20.58	$2,885.58	$0.78	$28.66	6.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,732	$107.03	$5,839.03	$1.58	$57.98	4.0
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,838	$88.69	$5,926.69	$1.60	$58.85	2.4
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,412	$72.66	$5,484.66	$1.48	$54.47	2.8
	CPKC	Minot, ND	Kalama, WA	Unit	$5,298	$442.89	$5,740.89	$1.55	$57.01	-3.7
	CPKC	Nekoma, ND	Chicago, IL	Manifest	$5,030	$266.18	$5,296.18	$1.43	$52.59	3.7
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$44.66	$3,444.66	$0.93	$34.21	-12.2
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$39.41	$3,639.41	$0.98	$36.14	-14.7
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$133.00	$5,933.00	$1.60	$58.92	-14.3
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$96.32	$5,796.32	$1.57	$57.56	-1.6
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$60.13	$4,260.13	$1.15	$42.31	-12.8
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$52.99	$4,052.99	$1.10	$40.25	-13.7
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$60.48	$3,560.48	$0.96	$35.36	-15.1
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$44.31	$3,744.31	$1.01	$37.18	-12.8
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$44.66	$3,944.66	$1.07	$39.17	-12.1
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$348.90	$4,873.90	$1.32	$48.40	-8.2
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$130.50	$5,097.50	$1.38	$50.62	1.6
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$172.20	$3,947.20	$1.07	$39.20	-9.6
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$229.50	$4,254.50	$1.15	$42.25	-9.0
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,791	$54.04	$4,845.04	$1.31	$48.11	3.4
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,439	$53.06	$4,492.06	$1.21	$44.61	3.7
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$23.31	$2,055.31	$0.56	$20.41	-0.8
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. CPKC = Canadian Pacific Kansas City. CSX = CSX Transportation. UP = Union Pacific Railroad. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.
Source: BNSF, CPKC, CSX, and UP.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, August 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	4.4
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$117.88	$5,587.88	$1.41	$55.49	-4.0
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$124.32	$6,124.32	$1.54	$60.82	3.6
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$50.96	$5,090.96	$1.28	$50.56	5.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$123.13	$5,473.13	$1.38	$54.35	-4.2
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$65.45	$4,625.45	$1.17	$45.93	5.8
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$53.48	$4,853.48	$1.22	$48.20	5.7
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$65.59	$4,605.59	$1.16	$45.74	5.8
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$99.33	$5,529.33	$1.39	$54.91	-3.8
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$116.62	$5,546.62	$1.40	$55.08	-4.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.60	$23.58	8.8
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.69	$27.35	7.5
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,342	$44.40	$1,386.40	$0.35	$13.77	-0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,047	$509.36	$5,556.36	$1.40	$55.18	-3.0
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$490.14	$6,003.14	$1.51	$59.61	2.2
	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
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$207.30	$4,292.30	$1.08	$42.62	6.4
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$471.60	$6,476.60	$1.63	$64.32	3.7
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$521.10	$6,686.10	$1.69	$66.40	3.5
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$214.20	$5,219.20	$1.32	$51.83	5.2
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$352.80	$6,037.80	$1.52	$59.96	4.2
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$216.90	$4,441.90	$1.12	$44.11	6.2
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$106.96	$6,241.96	$1.69	$61.99	-3.5
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$6,685	$114.38	$6,799.38	$1.84	$67.52	-1.2
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$102.83	$6,187.83	$1.67	$61.45	-3.5
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$59.85	$3,459.85	$0.94	$34.36	-24.6
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$113.68	$6,298.68	$1.70	$62.55	-3.5
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.64	$23.58	9.1
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.74	$27.35	7.8
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,785	$509.36	$6,294.36	$1.70	$62.51	-2.7
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$389.31	$3,915.31	$1.06	$38.88	-0.5
	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	5.0
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$468.60	$6,608.60	$1.79	$65.63	3.7
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$323.40	$5,833.40	$1.58	$57.93	4.4
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$369.30	$5,959.30	$1.61	$59.18	4.3

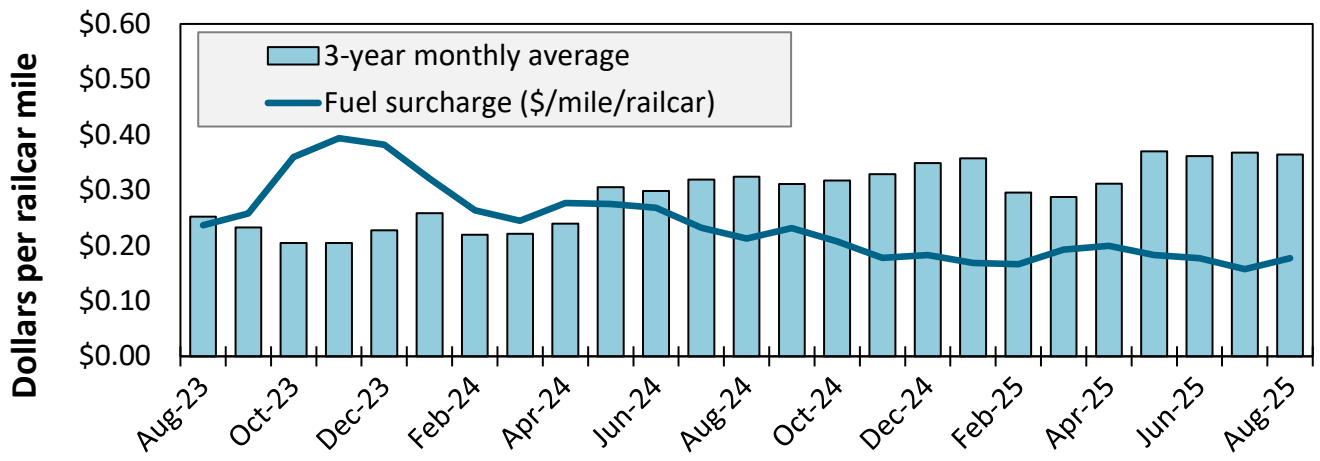
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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. CPKC = Canadian Pacific Kansas City. 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, CN, CPKC, CSX, and UP.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, August 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	0.6	5.3
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,555	$54.67	$1.39	0.7	1.3
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$5,824	$57.32	$1.46	0.7	-3.1
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,459	$53.73	$1.36	0.7	1.4
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,672	$55.82	$1.42	0.7	1.3
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,068	$49.88	$1.27	0.5	5.0
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,203	$51.21	$1.30	0.5	4.8
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,071	$49.91	$1.27	0.4	5.2
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,555	$54.67	$1.49	0.7	1.3
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$5,401	$53.16	$1.45	0.4	-1.0
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,615	$65.11	$1.77	0.4	3.8
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$5,401	$53.16	$1.45	0.4	-1.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,459	$53.73	$1.46	0.7	1.4
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,717	$66.11	$1.80	0.4	3.7
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,055	$30.07	$0.82	0.5	-26.0
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,855	$28.10	$0.76	0.6	-22.7
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,373	$43.04	$1.17	0.4	-9.4
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,459	$53.73	$1.46	0.7	1.4
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,265	$41.98	$1.14	0.4	-7.5

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).

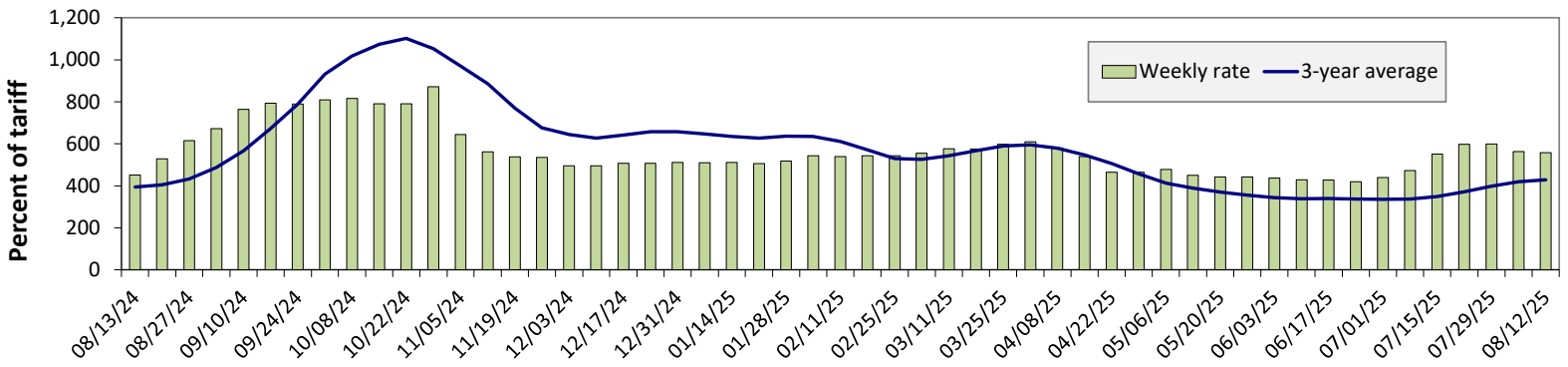
Figure 9. Railroad fuel surcharges, North American weighted average



August 2025: $0.18/mile, up 2 cents from last month’s surcharge of $0.16/mile; down 3 cents from the August 2024 surcharge of $0.21/mile; and down 18 cents from the August 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.

Figure 10. Illinois River barge freight rate



For the week ending August 12: 1 percent lower than the previous week; 24 percent higher than last year; and 30 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

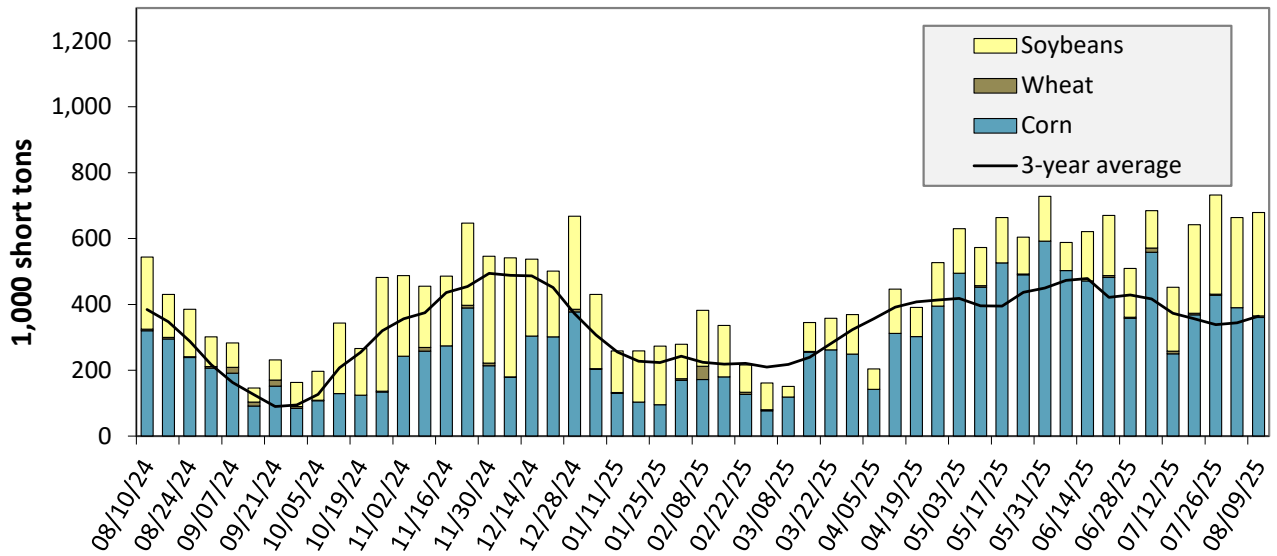
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	8/12/2025	596	568	558	449	464	445
	8/5/2025	620	591	563	459	461	401
$/ton	8/12/2025	36.89	30.22	25.89	17.92	21.76	13.97
	8/5/2025	38.38	31.44	26.12	18.31	21.62	12.59
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	8	18	24	19	4	25
	3-year avg.	14	25	30	25	12	30
Rate	September	770	741	721	711	714	732
	November	671	661	628	550	614	516

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 August 9: 25 percent higher than last year and 86 percent higher than the 3-year average.

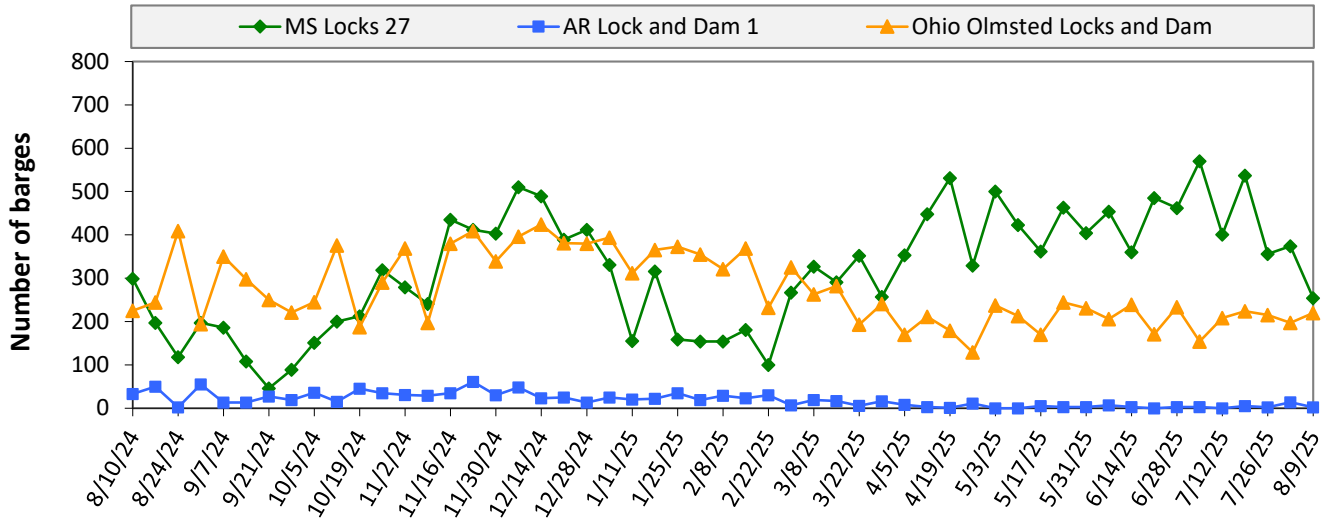
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/09/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	116	2	151	0	268
Mississippi River (Winfield, MO (L25))	261	3	271	0	535
Mississippi River (Alton, IL (L26))	350	5	290	0	645
Mississippi River (Granite City, IL (L27))	360	5	314	0	679
Illinois River (La Grange)	99	2	34	0	134
Ohio River (Olmsted)	29	40	80	0	149
Arkansas River (L1)	0	23	1	0	24
Weekly total - 2025	390	68	395	0	853
Weekly total - 2024	439	61	278	13	791
2025 YTD	12,996	810	6,928	125	20,858
2024 YTD	8,919	1,089	6,497	158	16,663
2025 as % of 2024 YTD	146	74	107	79	125
Last 4 weeks as % of 2024	120	80	174	104	134
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.

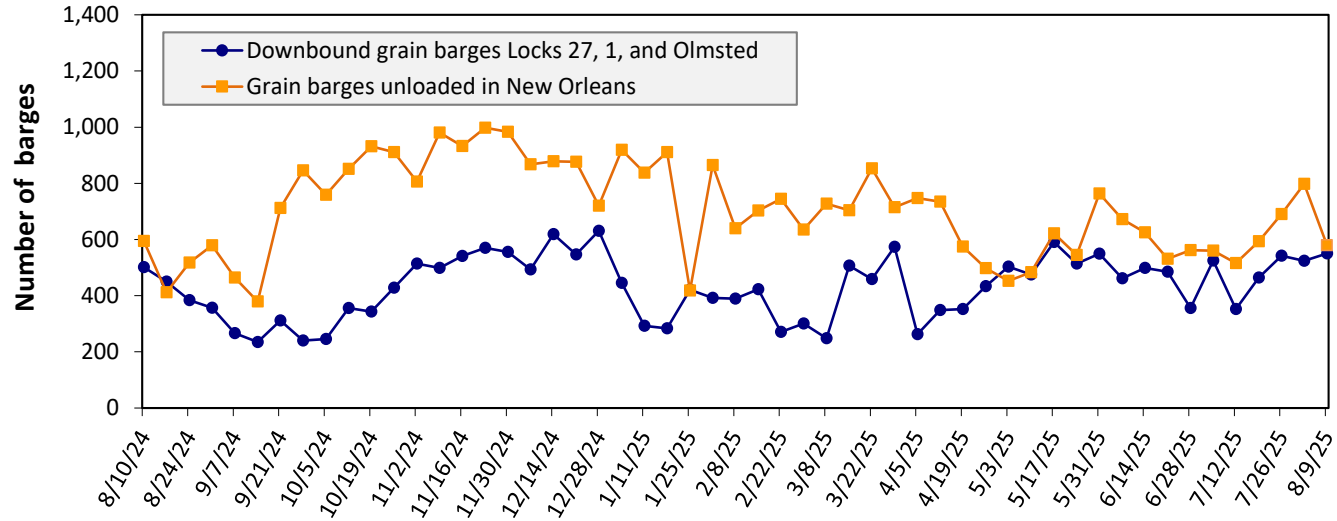
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 9: 476 barges transited the locks, 109 barges fewer than the previous week, and 2 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 August 9: 550 barges moved down river, 26 more than the previous week; 580 grain barges unloaded in the New Orleans Region, 27 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	
		August 2025	July 2025	August 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$23.06	$21.92	$21.78	5.9	4.2
	Central Ferry, WA/Almota, WA	$22.13	$21.02	$20.88	6.0	4.0
	Lyons Ferry, WA	$21.08	$20.01	$19.87	6.1	3.8
	Windust, WA/Lower Monumental, WA	$20.01	$18.98	$18.84	6.2	3.5
	Sheffler, WA	$19.98	$18.95	$18.81	6.2	3.5
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$18.74	$17.75	$17.61	6.4	3.2
	Port Kelly, WA/Wallula, WA	$18.51	$17.53	$17.39	6.4	3.2
	Umatilla, OR	$18.41	$17.43	$17.29	6.5	3.2
	Boardman, OR/Hogue Warner, OR	$18.14	$17.17	$17.03	6.5	3.1
	Arlington, OR/Roosevelt, WA	$17.98	$17.01	$16.87	6.6	3.1
	Biggs, OR	$16.60	$15.68	$15.54	6.8	2.6
	The Dalles, OR	$15.46	$14.58	$14.44	7.1	2.3

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)

July, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	222	0	222
Columbia River (Bonneville Lock and Dam (L1))	279	0	279
Monthly total 2025	279	0	279
Monthly total 2024	403	0	403
2025 YTD	2,208	0	2,208
2024 YTD	1,740	0	1,740

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.

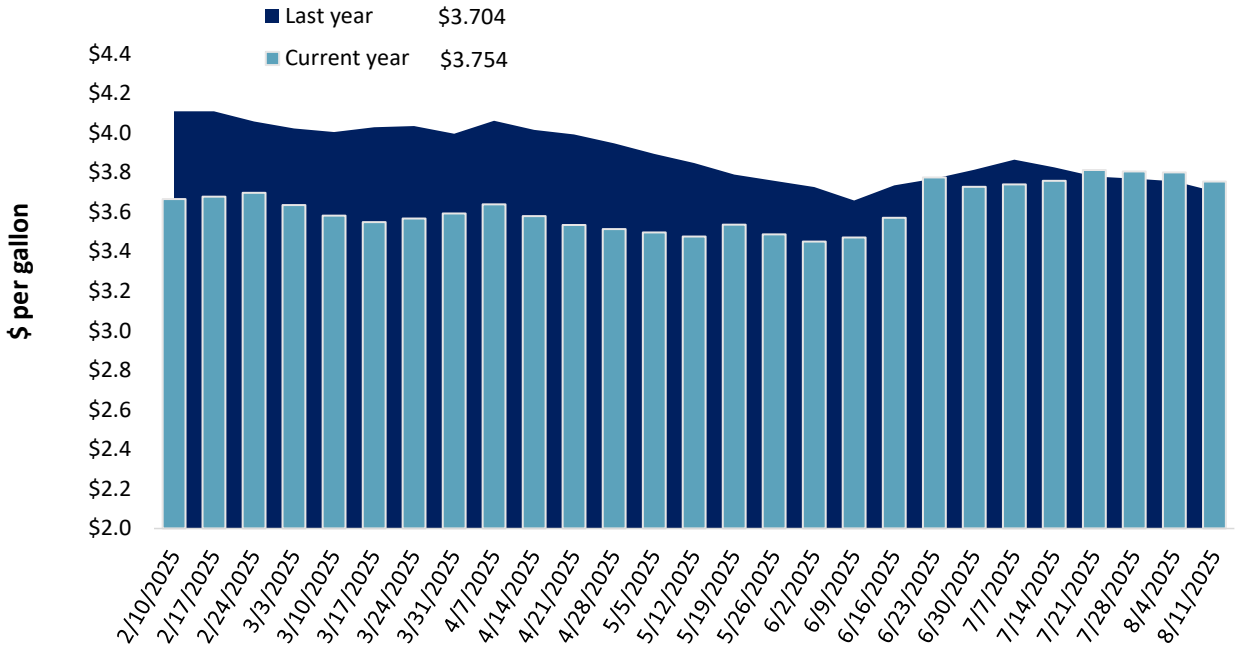
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 08/11/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.757	-0.050	-0.021
	New England	3.985	-0.007	-0.073
	Central Atlantic	3.942	-0.016	-0.019
	Lower Atlantic	3.666	-0.067	-0.015
II	Midwest	3.747	-0.045	0.066
III	Gulf Coast	3.397	-0.045	0.026
IV	Rocky Mountain	3.776	-0.017	0.079
V	West Coast	4.492	-0.048	0.183
	West Coast less California	4.148	-0.040	0.235
	California	4.889	-0.057	0.126
Total	United States	3.754	-0.046	0.050

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 August 11, the U.S. average diesel fuel price decreased 4.6 cents from the previous week to $3.754 per gallon, 5.0 cents above 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 7/31/2025	2,392	965	1,736	1,218	78	6,388	7,731	3,605	17,724
	This week year ago	1,336	820	1,790	1,145	84	5,174	5,985	3,088	14,247
	Last 4 wks. as % of same period 2023/24	171	124	98	92	99	120	154	126	135
Current shipped (cumulative) exports sales	2024/25 YTD	1,681	614	1,002	513	85	3,895	62,890	47,887	114,672
	2023/24 YTD	738	550	1,060	934	50	3,332	49,711	42,629	95,672
	YTD 2024/25 as % of 2023/24	228	112	95	55	169	117	127	112	120
	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 7/31/2025	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	4,505	23,141	22,427	3	17,746
Japan	1682	13,312	11,008	21	9,366
China	0	33	2,819	-99	8,233
Colombia	574	7,615	6,165	24	4,383
Korea	872	6,270	2,415	160	1,565
Top 5 importers	7,633	50,370	44,834	12	41,293
Total U.S. corn export sales	11,778	70,621	55,696	27	51,170
% of YTD current month's export projection	16%	99%	97%	-	-
Change from prior week	3,163	171	485	-	-
Top 5 importers' share of U.S. corn export sales	65%	71%	80%	-	81%
USDA forecast August 2025	73,029	71,632	57,280	25	-
Corn use for ethanol USDA forecast, August 2025	142,240	138,938	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 7/31/2025	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	24,546	-8	28,636
Mexico	1,143	5,225	4,846	8	4,917
Japan	206	2,125	2,163	-2	2,231
Egypt	106	3,619	1,499	141	2,228
Indonesia	72	2,057	2,209	-7	1,910
Top 5 importers	1,527	35,504	35,262	1	39,922
Total U.S. soybean export sales	3,579	51,493	45,717	13	51,302
% of YTD current month's export projection	8%	101%	99%	-	-
Change from prior week	545	468	325	-	-
Top 5 importers' share of U.S. soybean export sales	43%	69%	77%	-	78%
USDA forecast, July 2025	47,491	50,757	46,266	10	-

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 7/31/2025	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	1,706	1,378	24	3,358
Philippines	1,049	1,051	-0	2,473
Japan	744	733	2	2,045
China	0	141	-100	1,137
Korea	635	848	-25	1,674
Taiwan	396	449	-12	935
Thailand	233	268	-13	667
Nigeria	561	163	243	629
Indonesia	487	354	37	518
Colombia	290	129	124	489
Top 10 importers	6,100	5,515	11	13,926
Total U.S. wheat export sales	10,282	8,506	21	19,135
% of YTD current month's export projection	43%	38%	-	-
Change from prior week	738	211	-	-
Top 10 importers' share of U.S. wheat export sales	59%	65%	-	73%
USDA forecast, August 2025	23,814	22,480	6	-

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.

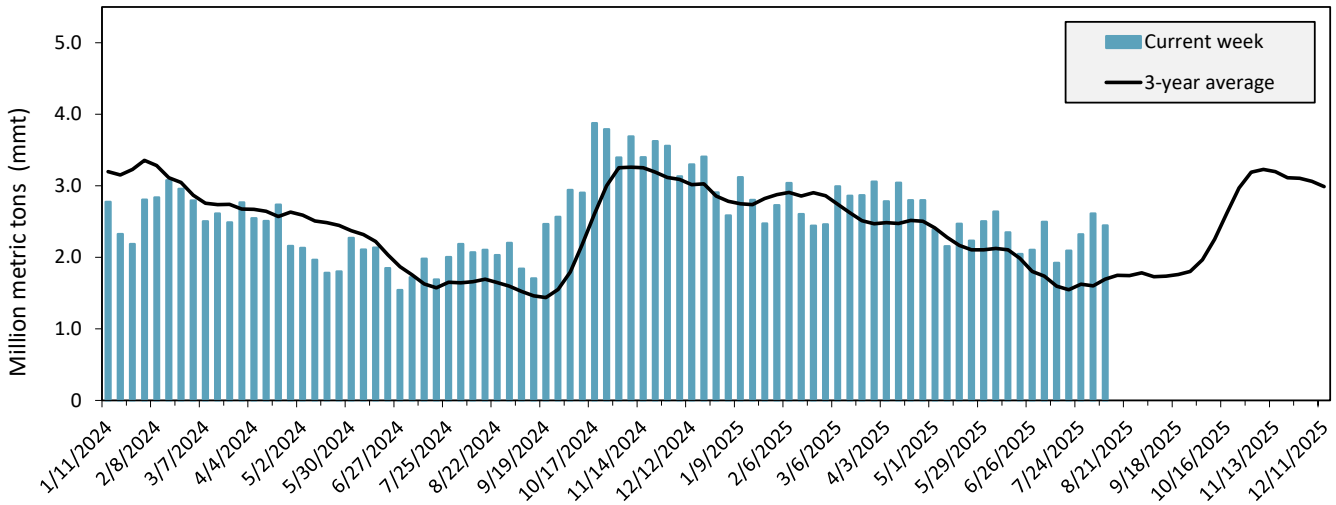
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 08/07/2025	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	507	198	256	15,191	11,316	134	130	277	13,987
	Soybeans	0	0	n/a	1,966	2,533	78	n/a	n/a	10,445
	Wheat	147	285	52	6,498	6,685	97	91	111	11,453
	All grain	654	492	133	23,771	21,619	110	114	174	37,186
Mississippi Gulf	Corn	552	727	76	22,674	16,235	140	107	141	27,407
	Soybeans	386	458	84	12,036	12,452	97	173	113	29,741
	Wheat	109	137	80	2,397	3,215	75	128	102	4,523
	All grain	1,047	1,322	79	37,147	31,961	116	126	126	61,789
Texas Gulf	Corn	30	0	n/a	243	317	77	168	123	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	50	166	30	2,647	1,098	241	165	223	1,940
	All grain	149	166	90	3,327	3,737	89	95	109	6,965
Interior	Corn	360	360	100	8,604	8,306	104	136	188	13,463
	Soybeans	131	157	83	4,106	4,356	94	103	130	8,059
	Wheat	56	84	66	1,886	1,850	102	101	120	2,989
	All grain	547	603	91	14,923	14,657	102	120	156	24,791
Great Lakes	Corn	23	0	n/a	64	0	n/a	n/a	-	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	0	17	0	155	272	57	19	34	653
	All grain	23	17	136	219	290	76	70	111	1,060
Atlantic	Corn	20	0	n/a	212	208	102	330	279	410
	Soybeans	2	13	12	484	439	110	973	121	1,272
	Wheat	4	1	252	48	24	200	106	36	73
	All grain	25	15	174	743	670	111	272	103	1,754
All Regions	Corn	1,492	1,285	116	46,989	36,382	129	122	179	56,109
	Soybeans	518	628	82	18,801	19,851	95	145	114	50,865
	Wheat	365	690	53	13,632	13,144	104	108	119	21,631
	All grain	2,446	2,615	94	80,234	72,988	110	119	140	134,016

*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.

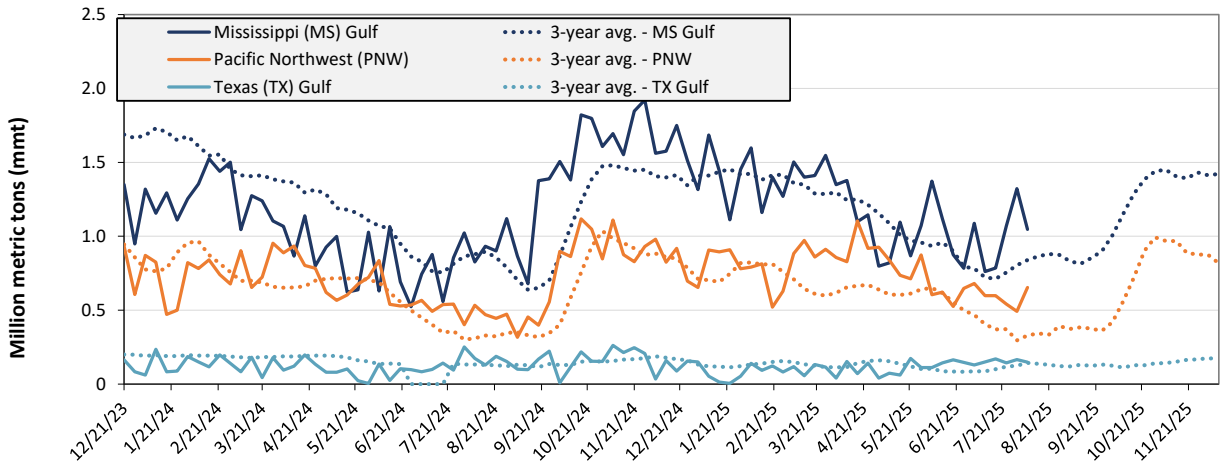
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 07: 2.4 mmt of grain inspected, down 6 percent from the previous week, up 6 percent from the same week last year, and up 44 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 08/07/25 inspections (mmt):
MS Gulf: 1.05
PNW: 0.65
TX Gulf: 0.15

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 21	down 10	down 20	up 33
Last year (same 7 days)	up 5	down 20	up 1	up 12
3-year average (4-week moving average)	up 25	up 3	up 22	up 99

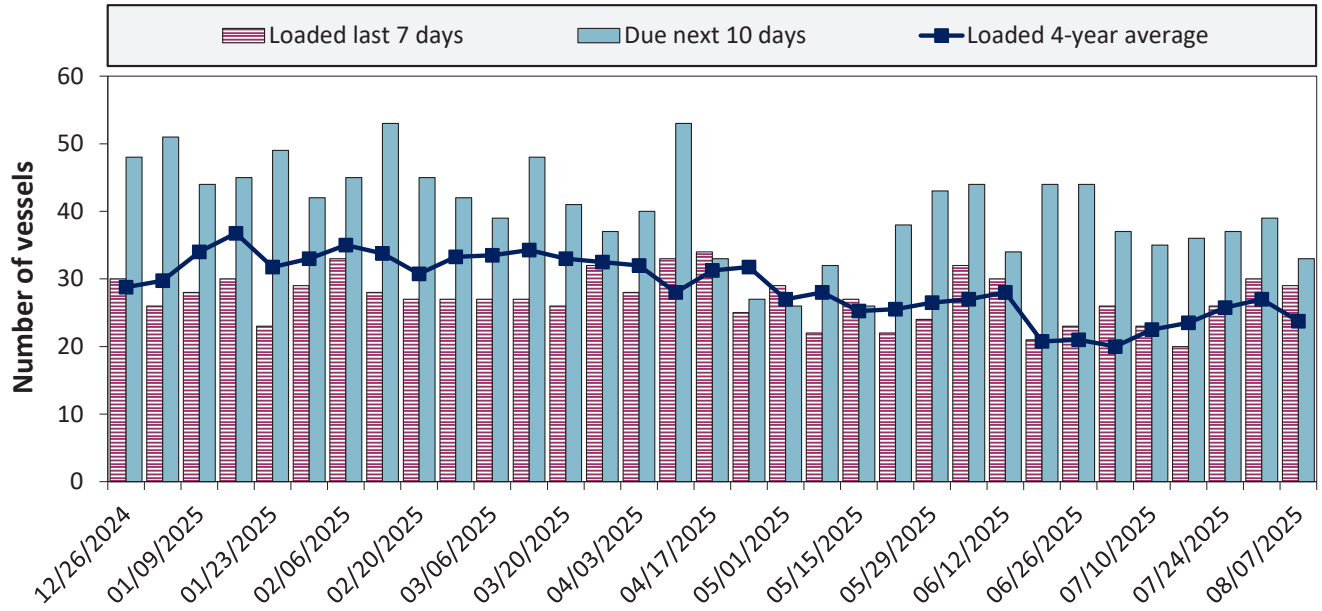
Source: USDA, Federal Grain Inspection Service.

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
8/7/2025	18	29	33	5
7/31/2025	22	30	39	8
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.

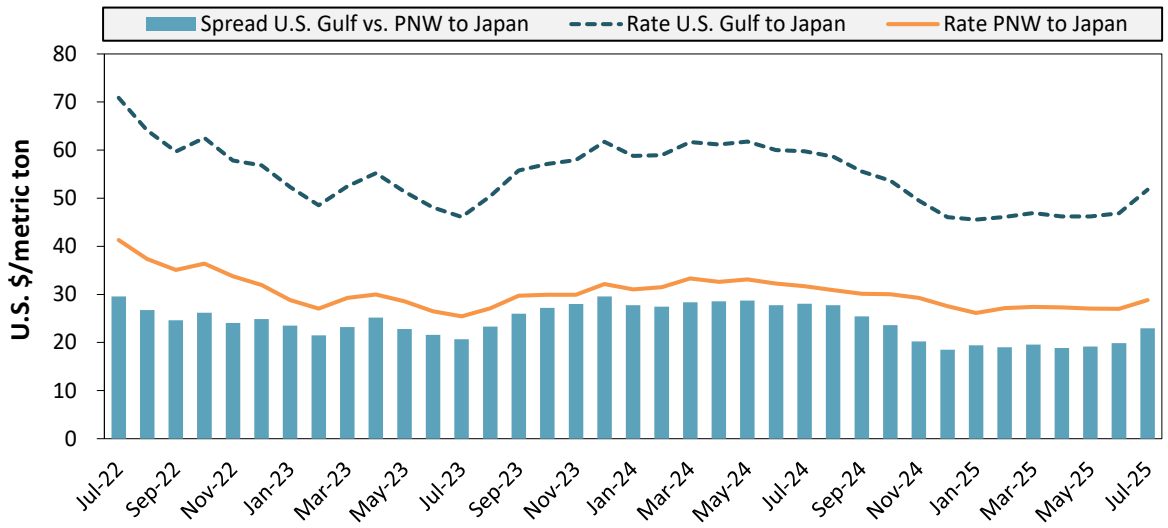
Figure 19. U.S. Gulf vessel loading activity



Week ending 08/07/25, number of vessels	Loaded	Due
Change from last year	45%	3%
Change from 4-year average	22%	1%

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
July 2025	$51.75	$28.80	$22.95
Change from July 2024	-13%	-9%	-18%
Change from 4-year average	-20%	-20%	-21%

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

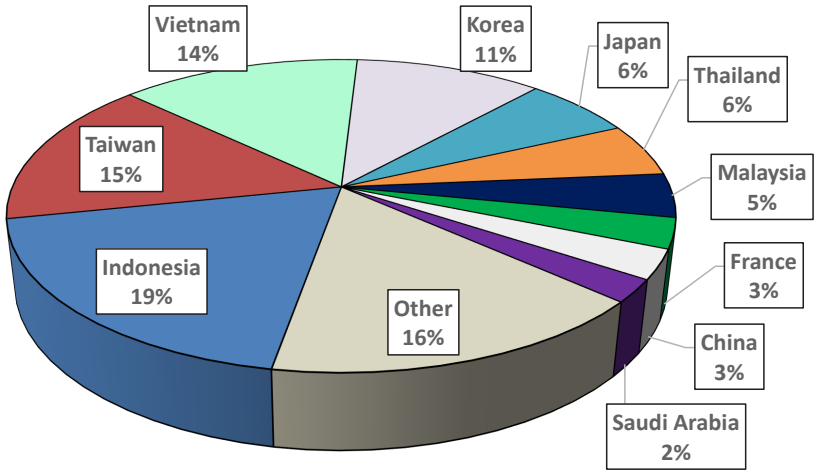
Table 20. Ocean freight rates for selected shipments, week ending 8/9/2025

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	Aug 7, 2025	Sep 1/10, 2025	58,000	62.50
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	Taiwan	Wheat	Jul 23, 2025	Sep 1/10, 2025	45,000	46.75
PNW	Taiwan	Wheat	Mar 28, 2025	May 1/10, 2025	50,000	39.75
EC S. America	China	Heavy grain	May 16, 2025	Jun 12/22, 2025	80,000	33.40
Brazil	N. China	Heavy grain	Jul 25, 2025	Aug 24/30, 2025	66,000	40.00
Brazil	N. China	Heavy grain	Jul 16, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	N. China	Heavy grain	Jul 15, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	N. China	Heavy grain	Jul 14, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	China	Heavy grain	July 10, 2025	Aug 5/15, 2025	64,000	40.00
Brazil	China	Heavy grain	Jun 23, 2025	Jul 11/15, 2025	63,000	34.75
Brazil	China	Heavy grain	Jun 5, 2025	Jun 25/30, 2025	63,000	37.50
Brazil	China	Heavy grain	May 7, 2025	Jun 20/Jul 20, 2025	63,000	32.75

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.

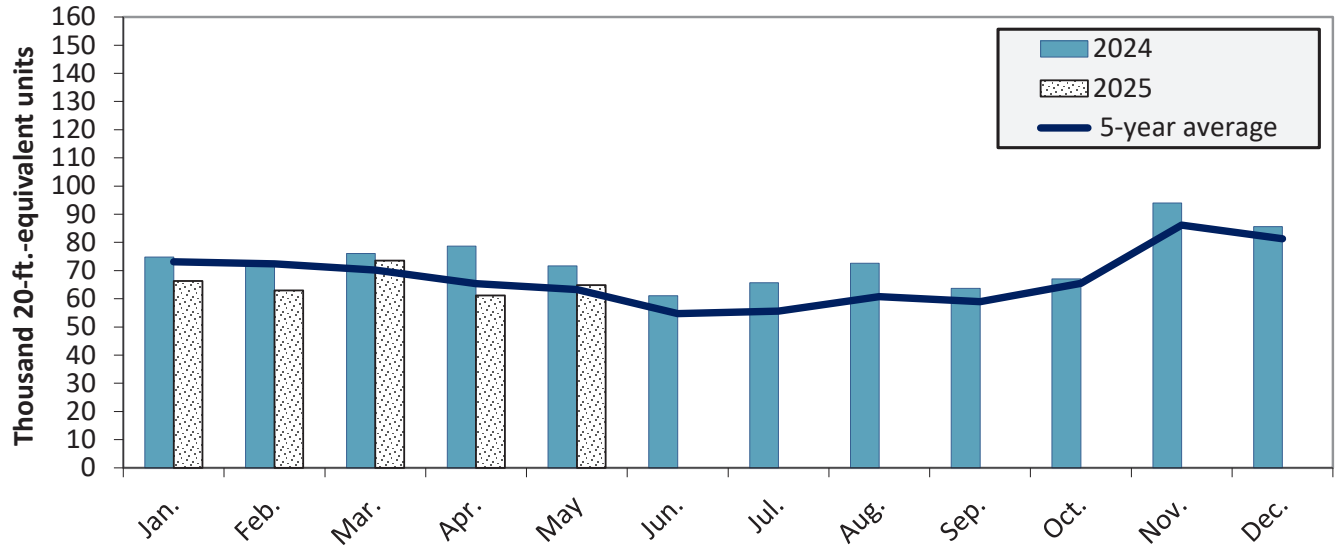
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-May 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 May 2025 were down 9.5 percent from last year but up 2.5 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

Subscription Information: Please sign up to receive regular email announcements of the latest GTR issue by **entering your email address** and selecting your preference to receive Transportation Research and Analysis. For any other information, you may contact us at **GTRContactUs@usda.gov**.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. August 14 2025.
Web: **http://dx.doi.org/10.9752/TS056.08-14-2025**

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***.

Photo Credit: Adobe Stock (unless otherwise noted by photo)