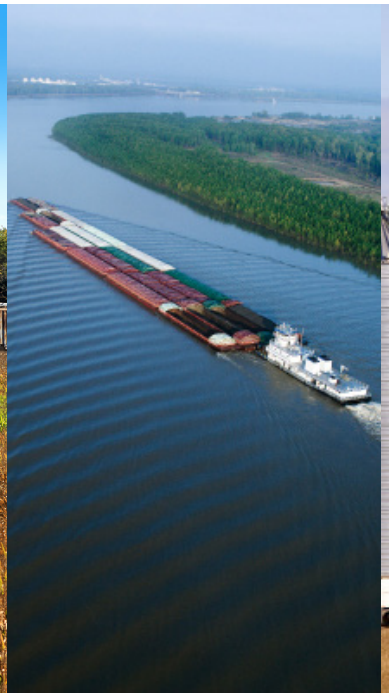
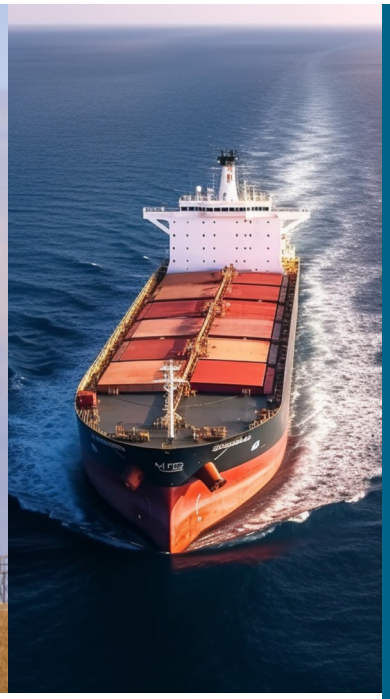
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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www.ams.usda.gov/GTR

New Corn Sales Highest in History and New Soybean Sales Lowest in 6 Years. For the week ending August 28, outstanding sales of corn for marketing year (MY) 2025/26 were 21.17 million metric tons (mmt), 86 percent higher than the same time last year, almost double the 3-year average, and the highest in history before the start of a new marketing year. These sales are unshipped and represent potential transportation demand. Mexico remains the largest buyer accounting for 33 percent of new crop sales, followed by Japan (12 percent), Colombia (8 percent), and South Korea (5 percent). China, once a large buyer of U.S. corn, has not been active in the U.S. corn market since MY 2021/22.

On the other hand, outstanding MY 2025/26 soybean sales (as of August 28) are about 8 mmt—32 percent below the same time last year, 50 percent below the 3-year average, and the lowest start before a new marketing year since 2019. Like corn, Mexico remains the largest buyer of soybeans accounting for 24 percent of new crop sales. China—which was the largest buyer of soybeans in MY 2024/25—has not made any purchases for MY 2025/26.

October Secondary Rail Values Reach 6-year Low Amid Weak Soybean Export Demand. As shown in GTR fig. 7, for the week ending September 4, secondary market values for BNSF Railway shuttle trains in October averaged $406 per car, per trip—significantly lower than the prior 5-year average for the same week ($1,250 per car, per trip).

Also, for the week ending September 4, secondary market values for Union Pacific Railroad shuttle trains in October averaged $250 per car, per trip—significantly lower than the prior 5-year average for the same week ($1,300 per car, per trip). October shuttle secondary market values for both railroads are the lowest since 2019.

Low secondary market values for October shuttle trains (immediately following harvest) reflect low export demand—particularly for soybean exports from Pacific Northwest export terminals (see first highlight). Since railroad service quality impacts shuttle turns (and thus, total capacity), low secondary market values also reflect strong service from both BNSF and Union Pacific (GTR table 4a and 4b).

Philadelphia Shipyard Plans Expansion. As part of South Korea's $150 billion U.S. shipbuilding investment, Hanwha Group, a South Korean conglomerate, has announced a $5 billion infrastructure plan for expansion of its shipyard in Philadelphia. Hanwha Shipping's U.S. unit has ordered 10 Jones Act oil and chemical tankers from the Philadelphia facility. It also exercised an option for a second LNG carrier, after a July order for the first such U.S.-built vessel in almost 50 years. Hanwha, which specializes in tanker construction, plans to expand annual production from about two to almost 20 vessels. The new deliveries are scheduled to begin in 2029.

China, South Korea, and Japan are the world's leading shipbuilders. Hanwha's Investment and expansion of production in its U.S. shipyard could help revitalize the U.S. maritime sector.

Diesel Price Rises for the Second Consecutive Week. For the week ending September 8, the U.S. average diesel fuel price increased 3.2 cents from the previous week to $3.766 per gallon, 21.1 cents above the same week last year. This is the second consecutive weekly price increase after 5 weeks of declines. The diesel price has increased 5.8 cents per gallon in the last 2 weeks.

According to the U.S. Energy Information Administration's (EIA) September Short Term Energy Outlook, the Brent crude oil price is projected to fall from $68 per barrel (b) in August to $58/b in fourth quarter 2025—driven by rising global oil inventory as OPEC+ members increase production. EIA also projects the diesel price to average $3.67 per gallon in fourth quarter 2025—down 8 cents from the projected third quarter price of $3.75 and up 1 cent from EIA's August forecast. U.S. diesel prices are projected to average $3.65 per gallon in 2025—down 11 cents from 2024's average price of $3.76 per gallon.

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 August 28, **unshipped balances** of corn and soybeans totaled 2.96 million metric tons (mmt), down 46 percent from last week and up 6 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 5.93 mmt, down 9 percent from last week and up 26 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were –0.28 mmt, down significantly from last week. Net **soybean export sales** were –0.02 mmt, up 87 percent from last week. Net **wheat export sales** for MY 2025/26 were 0.31 mmt, down 46 percent from last week.

Rail

U.S. Class I railroads originated 23,726 **grain carloads** during the week ending August 30. This was a 5-percent decrease from the previous week, unchanged from last year, and 12 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $46 below tariff for the week ending September 4. This was $108 more than last week and $321 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $31 below tariff. This was $15 less than last week, and $369 lower than this week last year.

Barge

For the week ending September 6, **barged grain movements** totaled 360,933 tons. This was 6 percent less than the previous week and 9 percent less than the same period last year.

For the week ending September 6, 231 grain barges **moved down river**—10 fewer than last week. There were 733 grain barges **unloaded** in the New Orleans region, 8 percent more than last week.

Ocean

For the week ending September 4, 26 **oceangoing grain vessels** were loaded in the Gulf—8 percent more than the same period last year. Within the next 10 days (starting September 5), 47 vessels were expected to be loaded—6 percent fewer than the same period last year.

As of September 4, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $56.00, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $29.25 per mt, unchanged from the previous week.

Second-Quarter 2025 Corn and Soybean Total Landed Costs

Costs for transporting corn and soybeans from Minneapolis, MN, to Japan decreased from second quarter 2024 to second quarter 2025 (year to year) via the U.S. Gulf (Gulf route) and the Pacific Northwest (PNW route). From first quarter 2025 to second quarter 2025 (quarter to quarter), transportation costs for both commodities fell via the Gulf and the PNW routes.

Year to year, for Minneapolis corn shipments via the Gulf to Japan, total landed costs rose because of higher farm values. Total landed costs for Minneapolis corn being shipped through the PNW fell because of lower transportation costs. Total landed costs for Minneapolis soybeans for both routes decreased year to year, because of lower transportation costs and farm values. Quarter to quarter, for the Gulf route, total landed costs

Table 1. Cost of shipping corn and soybeans from Minneapolis to Japan through the U.S. Gulf

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent change	
	2nd qtr. '24	1st qtr. '25	2nd qtr. '25	Yr. to yr.	Qtr. to qtr.	2nd qtr. '24	1st qtr. '25	2nd qtr. '25	Yr. to yr.	Qtr. to qtr.
Truck	16.47	21.69	18.07	9.71	-16.69	16.47	21.69	18.07	9.71	-16.69
Barge	24.29	18.65	36.64	50.84	96.46	24.29	18.65	36.64	50.84	96.46
Rail	-	36.55	-	-	-	-	42.36	-	-	-
Ocean	61.00	46.19	46.42	-23.90	0.50	61.00	46.19	46.42	-23.90	0.50
Total transportation cost	101.76	123.08	101.13	-0.62	-17.83	101.76	128.89	101.13	-0.62	-21.54
Farm value	169.92	172.17	174.66	2.79	1.45	417.65	358.37	366.33	-12.29	2.22
Total landed cost	271.68	295.25	275.79	1.51	-6.59	519.41	487.26	467.46	-10.00	-4.06
Transportation % landed cost	37.46	41.69	36.67	-0.79	-5.02	19.59	26.45	21.63	2.04	-4.82

Table 2. Cost of shipping corn and soybeans from Minneapolis to Japan through the Pacific Northwest

	Corn					Soybeans				
	$/metric ton			Percent change		$/metric ton			Percent change	
	2nd qtr. '24	1st qtr. '25	2nd qtr. '25	Yr. to yr.	Qtr. to qtr.	2nd qtr. '24	1st qtr. '25	2nd qtr. '25	Yr. to yr.	Qtr. to qtr.
Truck	16.47	21.69	18.07	9.71	-16.69	16.47	21.69	18.07	9.71	-16.69
Rail	58.67	55.25	55.47	-5.45	0.40	66.66	63.24	63.46	-4.80	0.35
Ocean	32.66	26.89	27.12	-16.96	0.86	32.66	26.89	27.12	-16.96	0.86
Total transportation cost	107.80	103.83	100.66	-6.62	-3.05	115.79	111.82	108.65	-6.17	-2.83
Farm value	169.02	172.17	174.66	3.34	1.45	417.65	358.37	366.33	-12.29	2.22
Total landed cost	276.82	276	275.32	-0.54	-0.25	533.44	470.19	474.98	-10.96	1.02
Transportation % landed cost	38.94	37.62	36.56	-2.38	-1.06	21.71	23.78	22.87	1.17	-0.91

Note: Barge rates are from Minneapolis to the Gulf for the second quarter and St. Louis to the Gulf for the first quarter. First quarter also includes a rail portion, from Minneapolis to St. Louis, given the closure of the Upper Mississippi River. All rail tariffs include fuel surcharges and revisions for heavy axle rail cars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car. USDA, National Agricultural Statistics Service is the source for corn and soybean prices. The quarter-to-quarter and year-to-year changes in transportation's share of total landed costs reflect percentage-point changes. qtr. = quarter; yr. = year.
Source: USDA, Agricultural Marketing Service.

for corn and soybeans fell because of lower transportation costs. For the PNW route, total landed costs for corn fell because of lower transportation costs. However, total landed costs for soybeans rose because of higher farm values (tables 1 and 2).

U.S. Gulf Costs

Transportation and total landed costs. Year to year, transportation costs for shipments going through the Gulf fell 1 percent for corn and fell 1 percent for soybeans. For both commodities, the decrease was driven by a 24-percent drop in ocean freight rates. Quarter to quarter, transportation costs for shipping through the Gulf were down 18 percent for corn and down 22 percent for soybeans. The quarter-to-quarter decreases reflected lower trucking rates and lower costs from a shift in the indicator's modal composition, as the annual reopening of the Upper Mississippi (after the winter closure) allowed barge trips from Minnesota to the Gulf.

In second quarter 2025, transportation costs for corn going through the Gulf represented 37 percent of total landed costs—down 1 percentage point year to year and down 5 percentage points quarter to quarter. For soybeans, transportation costs accounted for 22 percent of total landed costs—up 2 percentage points year to year and down 5 percentage points quarter to quarter (see table 1).

Inspections. Up 43 percent year to year, second-quarter 2025 U.S. Gulf corn inspections totaled 10 mmt, which was 48 percent of total second quarter 2025 corn inspections. Up 7 percent year to year, U.S. Gulf soybean inspections totaled 2.9 mmt, which was 59 percent of total second quarter 2025 soybean inspections.

Pacific Northwest Costs

Transportation and total landed costs. Year to year, PNW-route transportation costs fell 7 percent for corn and fell 6 percent for soybeans, because of lower rail and ocean freight rates. Quarter to quarter, transportation costs decreased 3 percent for both corn and soybeans due to lower trucking freight rates.

Total landed costs for corn decreased less than 1 percent year to year and quarter to quarter, because of lower transportation costs. Likewise, soybean landed costs decreased 11 percent year to year, because of lower farm values and transportation costs, and rose 1 percent quarter to quarter, because of higher farm values.

In second quarter 2025, transportation costs for corn being shipped through the PNW accounted for 37 percent of the total landed costs—down 2 percentage points year to year and down 1 percentage point quarter to quarter. For soybeans, transportation costs accounted for 23 percent of total landed costs—up 1 percentage point year to year and down 1 percentage point quarter to quarter (see table 2).

Inspections. Second-quarter corn inspections in the PNW totaled 6.8 mmt, up 26 percent year to year, mainly because of an increase in corn inspections destined to Asia. PNW corn inspections were 33 percent of total second quarter 2025 corn inspections. PNW soybean inspections totaled 0.2 mmt, up 222 percent year to year.

Market Outlook

According to USDA's August *World Agricultural Supply and Demand Estimates* report, from marketing year (MY) 2024/25 to MY 2025/26, total U.S. corn exports are expected to increase 2 percent, to 73.03 mmt. Also, from MY 2024/25 to MY 2025/26, soybean exports are expected to decrease 9 percent, to 46.40 mmt.

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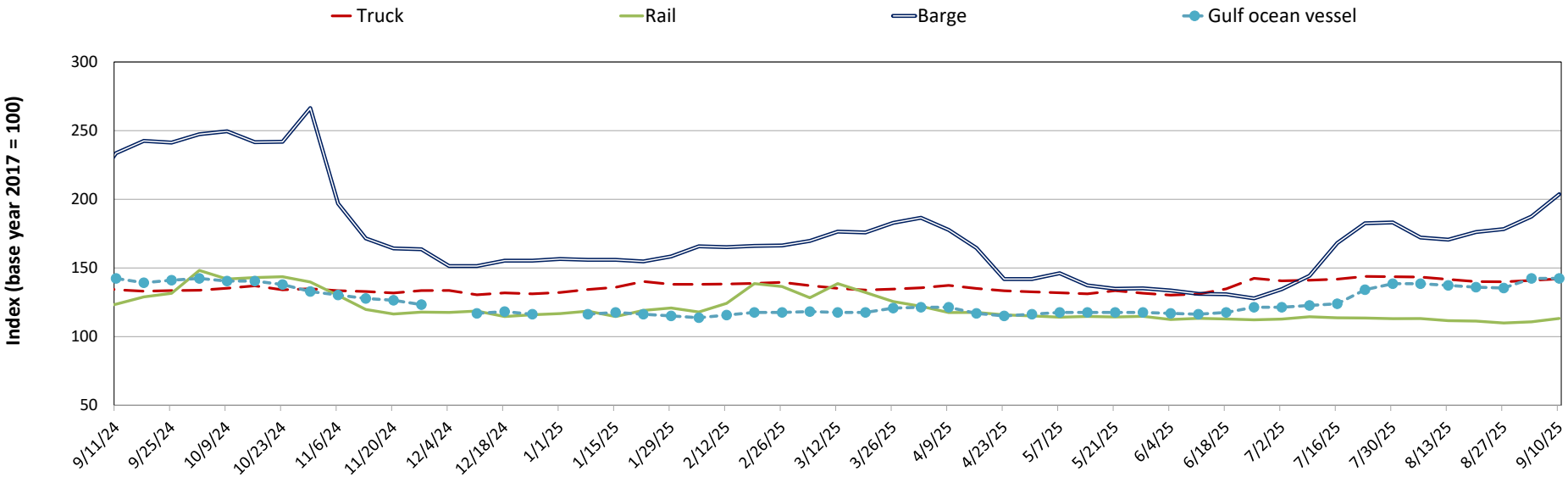
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
09/10/25	142	113	204	142	139
09/03/25	141	111	187	142	139
09/11/24	134	124	234	142	143

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.

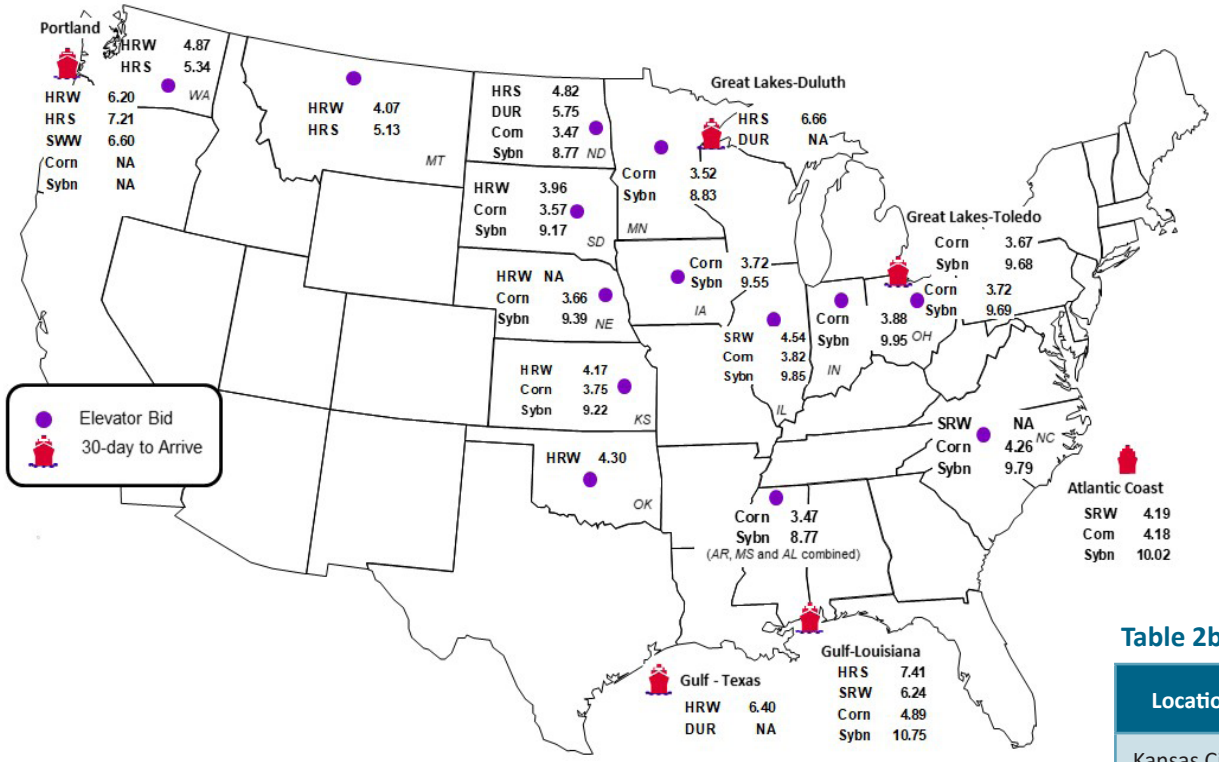
Figure 1. Grain transportation cost indicators as of week ending 9/10/25



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	9/5/2025	8/29/2025
Corn	IL–Gulf	-1.07	-0.98
Corn	NE–Gulf	-1.23	-1.11
Soybean	IA–Gulf	-1.20	-1.21
HRW	KS–Gulf	-2.23	-2.29
HRS	ND–Portland	-2.39	-2.24

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	9/5/2025	Week ago 8/29/2025	Year ago 9/6/2024
Kansas City	Wheat	Dec	5.052	5.196	5.782
Minneapolis	Wheat	Dec	5.660	5.800	6.136
Chicago	Wheat	Dec	5.192	5.342	5.672
Chicago	Corn	Dec	4.178	4.202	4.056
Chicago	Soybean	Dec	10.270	10.544	10.134

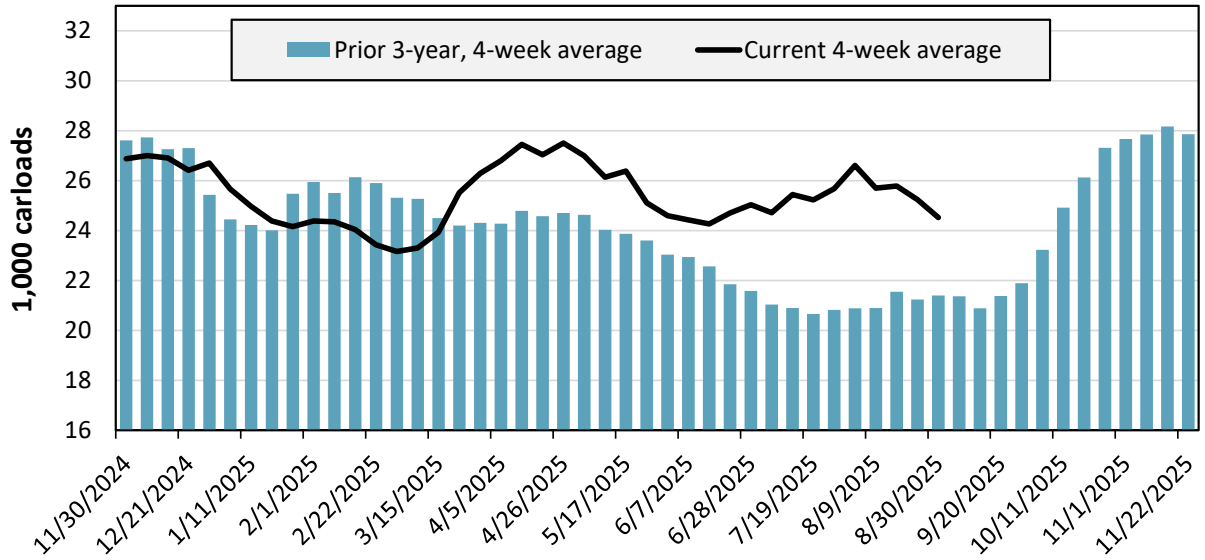
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/30/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,075	2,077	10,815	5,799	2,657	1,303	23,726
This week last year	1,690	2,903	11,455	4,446	2,191	1,160	23,845
2025 YTD	53,938	96,224	384,555	201,469	96,601	48,972	881,759
2024 YTD	57,964	94,166	362,492	178,122	93,644	32,519	818,907
2025 YTD as % of 2024 YTD	93	102	106	113	103	151	108
Last 4 weeks as % of 2024	70	77	108	112	121	140	105
Last 4 weeks as % of 3-yr. avg.	77	95	123	111	123	133	115
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 30, grain carloads were down 3 percent from the previous week, up 5 percent from last year, and up 15 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: 8/29/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	21.6	32.6	10.8	17.9	9.1	32.2	20.7
	Average over last 4 weeks	17.8	23.8	12.1	14.4	7.3	40.4	19.3
	Average of same 4 weeks last year	22.3	24.4	18.1	20.7	9.7	n/a	19.0
Average grain unit train speeds (miles per hour)	This week	23.9	19.1	25.0	23.3	22.4	12.3	21.0
	Average over last 4 weeks	22.9	19.4	24.0	22.8	23.1	13.7	21.0
	Average of same 4 weeks last year	23.5	20.3	23.4	21.7	23.8	n/a	22.5

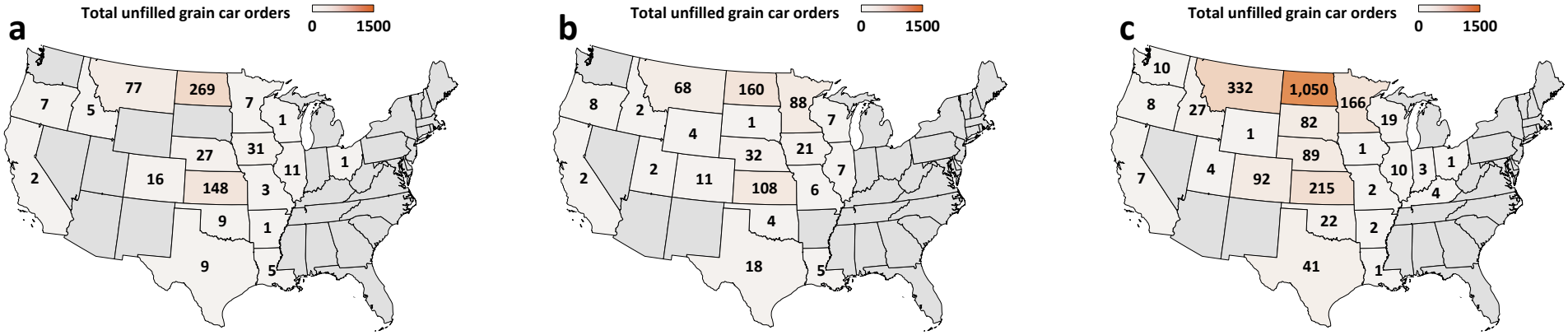
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 8/29/2025		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	9	4	239	49	6	248	555
	Average over last 4 weeks	13	5	219	65	8	335	644
	Average of same 4 weeks last year	19	8	407	128	4	n/a	566
Average number of loaded grain cars not moved in over 48 hours	This week	31	129	214	39	3	398	814
	Average over last 4 weeks	19	129	262	64	7	668	1,149
	Average of same 4 weeks last year	27	135	622	124	3	n/a	912
Average number of grain unit trains held	This week	0	0	1	3	0	13	17
	Average over last 4 weeks	0	1	3	3	0	10	17
	Average of same 4 weeks last year	0	0	17	7	0	n/a	24
Total unfilled manifest grain car orders	This week	1	7	142	259	0	320	729
	Average over last 4 weeks	0	4	157	203	0	271	635
	Average of same 4 weeks last year	8	3	1,605	391	0	n/a	2,007

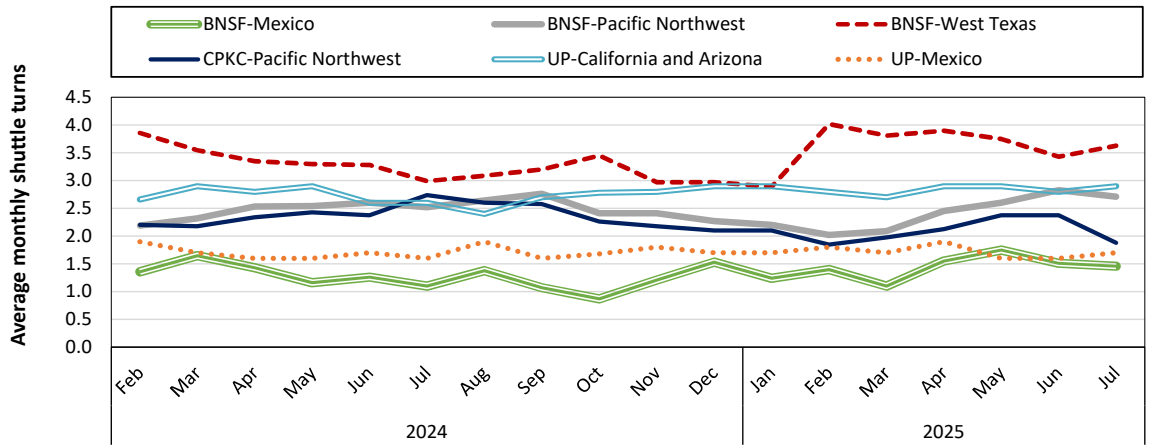
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 8/29/2025 (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

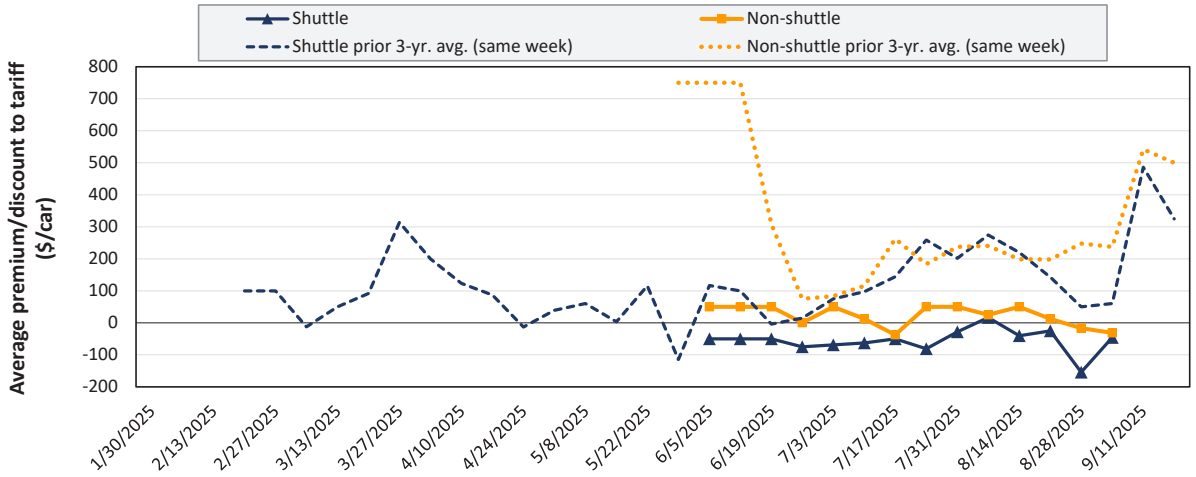


In July 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 1.9 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to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



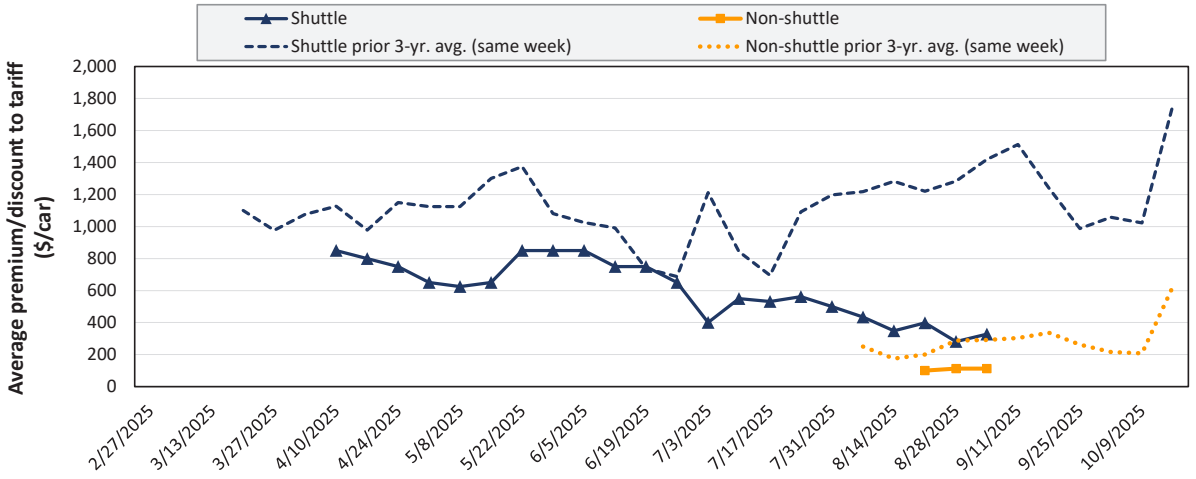
Average non-shuttle bids/offers fell $15 this week, and are $81 below the peak.

Average shuttle bids/offers rose $108 this week and are $63 below the peak.

9/4/2025	BNSF	UP
Non-Shuttle	$38	-$100
Shuttle	-$85	-$6

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 October 2025



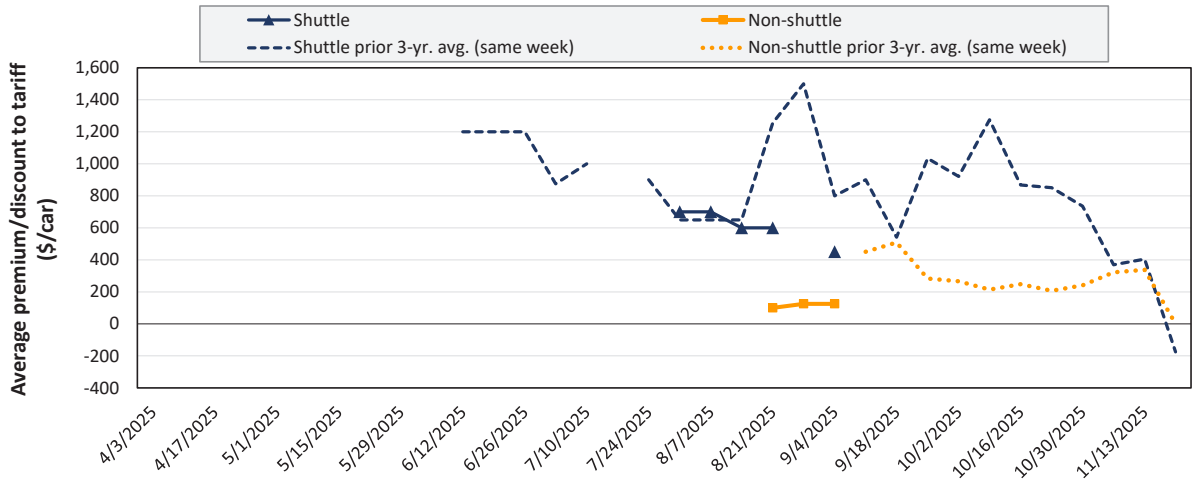
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers rose $47 this week and are $522 below the peak.

9/4/2025	BNSF	UP
Non-Shuttle	$125	$100
Shuttle	$406	$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 November 2025



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

There were no shuttle bids/offers last week. Average shuttle bids/offers this week are $250 below the peak.

9/4/2025	BNSF	UP
Non-Shuttle	$150	$100
Shuttle	$450	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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

For the week ending: 9/4/2025		Delivery period					
		Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26
Non-shuttle	BNSF	38	125	150	n/a	n/a	n/a
	Change from last week	-29	-25	0	n/a	n/a	n/a
	Change from same week 2024	-463	-475	n/a	n/a	n/a	n/a
	UP	-100	100	100	100	n/a	n/a
	Change from last week	0	25	0	0	n/a	n/a
	Change from same week 2024	-275	-200	n/a	n/a	n/a	n/a
Shuttle	BNSF	-85	406	450	n/a	n/a	n/a
	Change from last week	115	43	n/a	n/a	n/a	n/a
	Change from same week 2024	-535	-994	n/a	n/a	n/a	n/a
	UP	-6	250	n/a	n/a	n/a	n/a
	Change from last week	102	50	n/a	n/a	n/a	n/a
	Change from same week 2024	-106	-1,063	n/a	n/a	n/a	n/a
	CPKC	0	100	n/a	n/a	n/a	n/a
	Change from last week	-50	-100	n/a	n/a	n/a	n/a
	Change from same week 2024	-500	-400	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, September 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	$130.57	$5,962.57	$1.61	$59.21	2.6
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,291	$67.21	$4,358.21	$1.18	$43.28	4.2
	CPKC	Westby, MT	St. Louis, MO	Unit	$5,788	$500.22	$6,288.22	$1.70	$62.45	3.4
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,804	$78.21	$4,882.21	$1.32	$48.48	3.6
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,215	$165.11	$6,380.11	$1.72	$63.36	2.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,865	$32.34	$2,897.34	$0.78	$28.77	6.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,732	$168.19	$5,900.19	$1.59	$58.59	4.2
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,838	$139.37	$5,977.37	$1.62	$59.36	2.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,412	$114.18	$5,526.18	$1.49	$54.88	3.0
	CPKC	Minot, ND	Kalama, WA	Unit	$5,298	$442.89	$5,740.89	$1.55	$57.01	-3.3
	CPKC	Nekoma, ND	Chicago, IL	Manifest	$5,030	$266.18	$5,296.18	$1.43	$52.59	4.0
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$70.18	$3,470.18	$0.94	$34.46	-12.0
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$61.93	$3,661.93	$0.99	$36.36	-14.5
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$209.00	$6,009.00	$1.62	$59.67	-13.9
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$151.36	$5,851.36	$1.58	$58.11	-1.4
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$94.49	$4,294.49	$1.16	$42.65	-12.6
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$83.27	$4,083.27	$1.10	$40.55	-13.5
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$95.04	$3,595.04	$0.97	$35.70	-14.8
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$69.63	$3,769.63	$1.02	$37.43	-12.6
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$70.18	$3,970.18	$1.07	$39.43	-11.9
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$395.42	$4,920.42	$1.33	$48.86	-7.7
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$147.90	$5,114.90	$1.38	$50.79	1.7
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$195.16	$3,970.16	$1.07	$39.43	-9.3
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$260.10	$4,285.10	$1.16	$42.55	-8.7
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,791	$84.92	$4,875.92	$1.32	$48.42	3.6
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,439	$83.38	$4,522.38	$1.22	$44.91	3.9
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$36.63	$2,068.63	$0.56	$20.54	-0.6
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, September 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	$117.26	$5,917.26	$1.49	$58.76	4.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$185.24	$5,655.24	$1.43	$56.16	-3.7
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$195.36	$6,195.36	$1.56	$61.52	3.8
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$80.08	$5,120.08	$1.29	$50.84	5.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$193.49	$5,543.49	$1.40	$55.05	-3.8
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$102.85	$4,662.85	$1.18	$46.30	6.0
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$84.04	$4,884.04	$1.23	$48.50	5.8
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$103.07	$4,643.07	$1.17	$46.11	6.0
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$156.09	$5,586.09	$1.41	$55.47	-3.6
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$183.26	$5,613.26	$1.42	$55.74	-3.7
	CN	Gibson City, IL	Reserve, LA	Private	$2,191	$338.87	$2,529.87	$0.64	$25.12	9.3
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,571	$338.87	$2,909.87	$0.73	$28.90	8.0
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,342	$49.20	$1,391.20	$0.35	$13.82	0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,047	$509.36	$5,556.36	$1.40	$55.18	-2.5
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$490.14	$6,003.14	$1.51	$59.61	2.7
	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	$234.94	$4,319.94	$1.09	$42.90	6.7
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$534.48	$6,539.48	$1.65	$64.94	4.2
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$590.58	$6,755.58	$1.70	$67.09	4.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$242.76	$5,247.76	$1.32	$52.11	5.5
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$399.84	$6,084.84	$1.53	$60.43	4.6
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$245.82	$4,470.82	$1.13	$44.40	6.5
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$168.08	$6,303.08	$1.70	$62.59	-1.0
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$5,185	$179.74	$5,364.74	$1.45	$53.27	-22.6
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$161.59	$6,246.59	$1.69	$62.03	-0.9
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$94.05	$3,494.05	$0.94	$34.70	-24.3
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$178.64	$6,363.64	$1.72	$63.19	-1.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,191	$338.87	$2,529.87	$0.68	$25.12	9.6
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,571	$338.87	$2,909.87	$0.79	$28.90	8.3
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,785	$509.36	$6,294.36	$1.70	$62.51	-2.2
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$389.31	$3,915.31	$1.06	$38.88	0.2
	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	$3,650	$253.98	$3,903.98	$1.06	$38.77	-27.9
	UP	Cozad, NE	Kalama, WA	Railroad	$5,140	$531.08	$5,671.08	$1.53	$56.32	-15.2
	UP	Cozad, NE	Houston, TX	Railroad	$4,010	$366.52	$4,376.52	$1.18	$43.46	-25.7
	UP	Sloan, IA	Ama, LA	Railroad	$4,090	$418.54	$4,508.54	$1.22	$44.77	-25.1

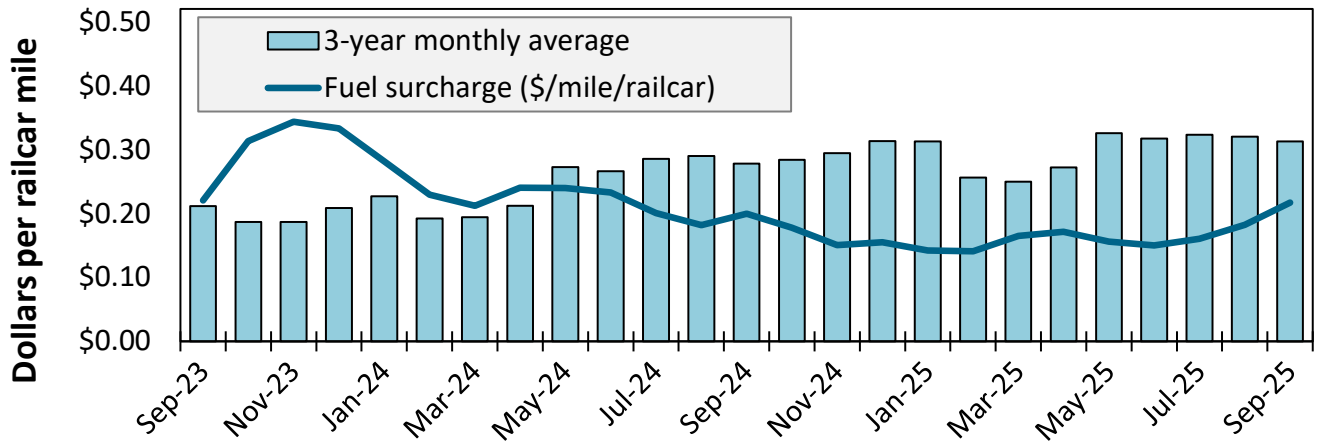
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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, September 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	$4,701	$46.27	$1.18	1.1	5.6
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,607	$55.18	$1.40	0.9	1.8
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$6,133	$60.36	$1.53	0.9	1.6
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,508	$54.21	$1.38	0.9	1.8
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,724	$56.34	$1.43	0.9	1.7
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,119	$50.38	$1.28	1.0	5.5
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,256	$51.73	$1.31	1.0	5.4
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,111	$50.30	$1.28	0.8	5.4
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,607	$55.18	$1.50	0.9	1.8
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$4,445	$43.75	$1.19	-17.7	-19.0
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$5,363	$52.78	$1.44	-18.9	-19.7
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$4,444	$43.74	$1.19	-17.7	-19.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,508	$54.21	$1.48	0.9	1.8
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$5,468	$53.82	$1.46	-18.6	-19.4
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,086	$30.37	$0.83	1.0	-25.7
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,886	$28.40	$0.77	1.1	-22.4
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,409	$43.39	$1.18	0.8	-9.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,508	$54.21	$1.48	0.9	1.8
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,297	$42.29	$1.15	0.8	-7.1

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).

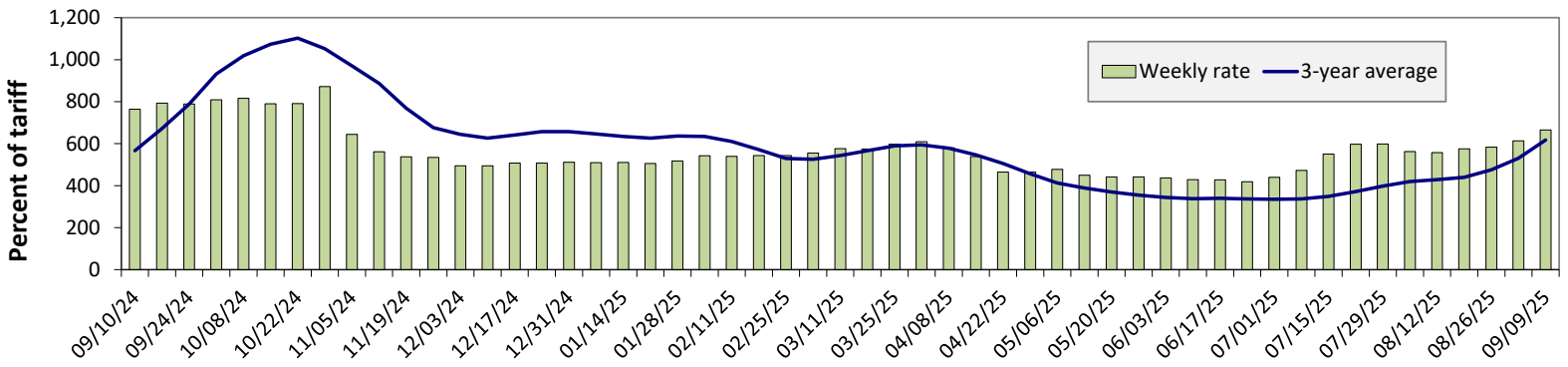
Figure 9. Railroad fuel surcharges, North American weighted average



September 2025: $0.22/mile, up 4 cents from last month’s surcharge of $0.18/mile; up 2 cents from the September 2024 surcharge of $0.2/mile; and down 9 cents from the September prior 3-year average of $0.31/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 September 9: 9 percent higher than the previous week; 13 percent lower than last year; and 8 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

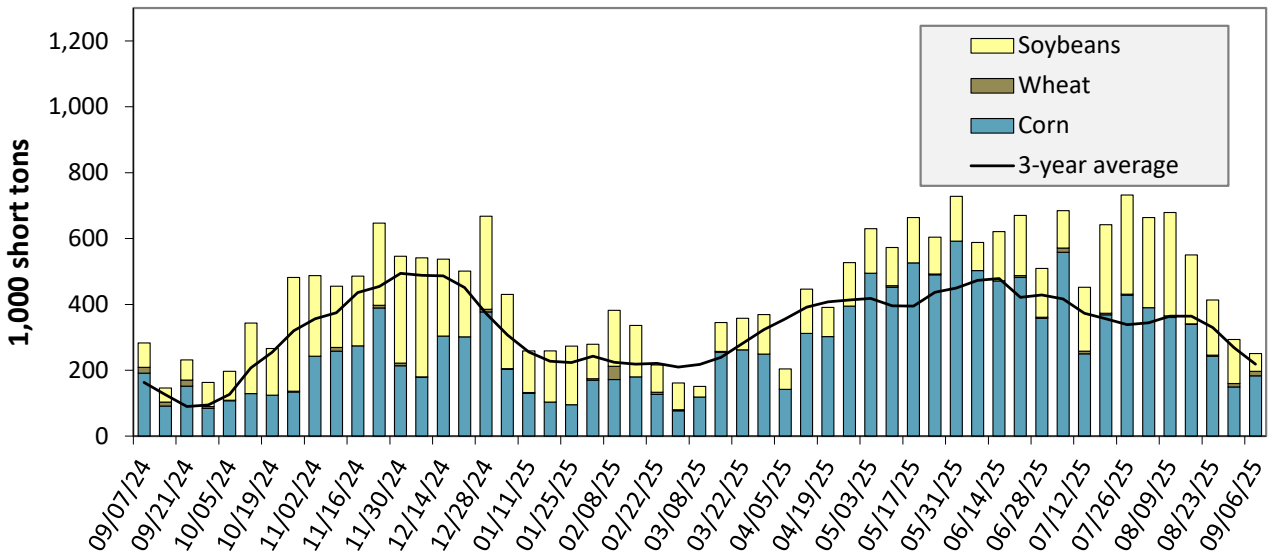
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	9/9/2025	678	669	666	582	664	584
	9/2/2025	625	619	613	506	558	511
$/ton	9/9/2025	41.97	35.59	30.90	23.22	31.14	18.34
	9/2/2025	38.69	32.93	28.44	20.19	26.17	16.05
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	-5	-12	-13	-27	-15	-28
	3-year avg.	3	6	8	-1	9	-8
Rate	October	812	800	788	745	797	716
	December	0	0	572	470	543	435

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 September 6: 11 percent lower than last year and 15 percent higher than the 3-year average.

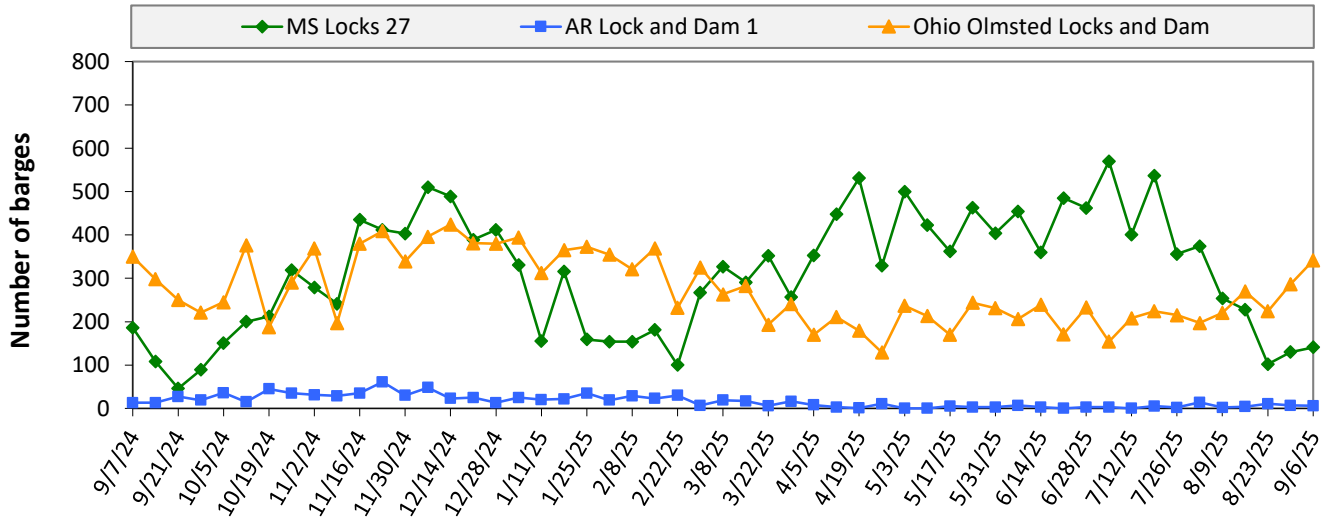
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 09/06/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	54	0	27	0	81
Mississippi River (Winfield, MO (L25))	124	14	40	2	180
Mississippi River (Alton, IL (L26))	196	14	54	2	266
Mississippi River (Granite City, IL (L27))	183	14	54	2	253
Illinois River (La Grange)	46	0	11	0	57
Ohio River (Olmsted)	37	14	25	0	76
Arkansas River (L1)	10	17	6	0	33
Weekly total - 2025	230	45	84	2	361
Weekly total - 2024	247	44	103	0	395
2025 YTD	14,018	991	7,615	131	22,756
2024 YTD	10,300	1,268	7,086	170	18,824
2025 as % of 2024 YTD	136	78	107	77	121
Last 4 weeks as % of 2024	74	101	117	57	88
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.

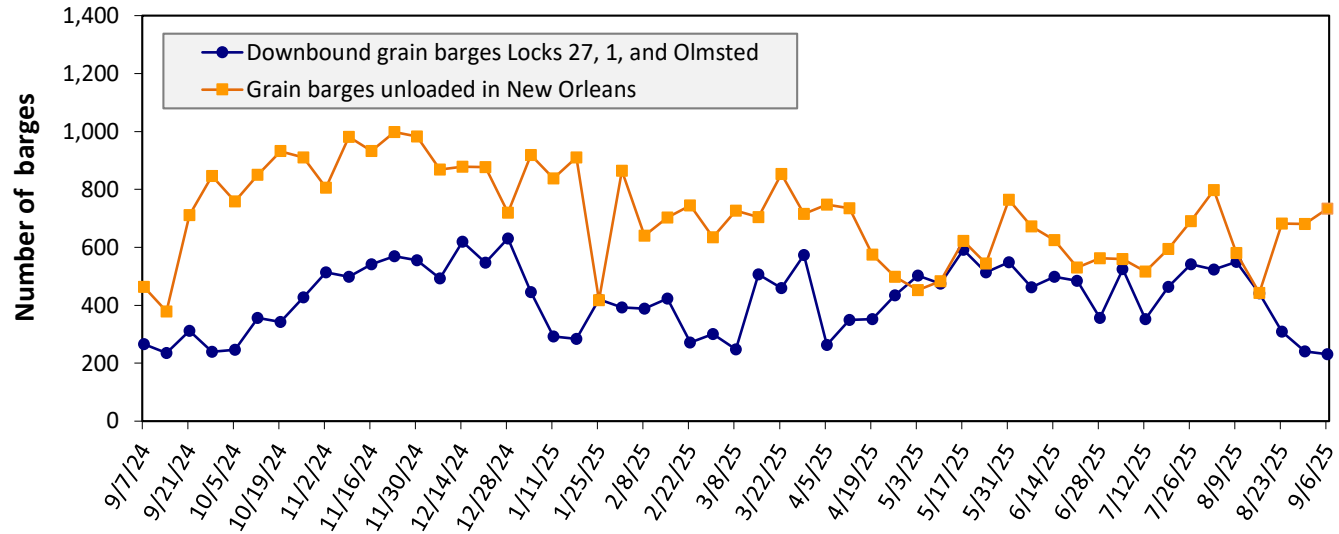
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending September 6: 488 barges transited the locks, 65 barges more than the previous week, and 17 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 September 6: 231 barges moved down river, 10 fewer than the previous week; 733 grain barges unloaded in the New Orleans Region, 8 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	
		September 2025	August 2025	September 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$23.18	$23.06	$21.87	6.0	5.6
	Central Ferry, WA/Almota, WA	$22.25	$22.13	$20.97	6.1	5.5
	Lyons Ferry, WA	$21.20	$21.08	$19.96	6.2	5.3
	Windust, WA/Lower Monumental, WA	$20.13	$20.01	$18.93	6.3	5.2
	Sheffler, WA	$20.10	$19.98	$18.90	6.3	5.2
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$18.86	$18.74	$17.70	6.6	5.0
	Port Kelly, WA/Wallula, WA	$18.63	$18.51	$17.48	6.6	4.9
	Umatilla, OR	$18.53	$18.41	$17.38	6.6	4.9
	Boardman, OR/Hogue Warner, OR	$18.26	$18.14	$17.12	6.7	4.9
	Arlington, OR/Roosevelt, WA	$18.10	$17.98	$16.96	6.7	4.9
	Biggs, OR	$16.72	$16.60	$15.63	7.0	4.6
	The Dalles, OR	$15.58	$15.46	$14.53	7.2	4.3

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)

August, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	353	0	353
Columbia River (Bonneville Lock and Dam (L1))	421	0	421
Monthly total 2025	421	0	421
Monthly total 2024	421	0	421
2025 YTD	2,629	0	2,629
2024 YTD	2,161	0	2,161

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.

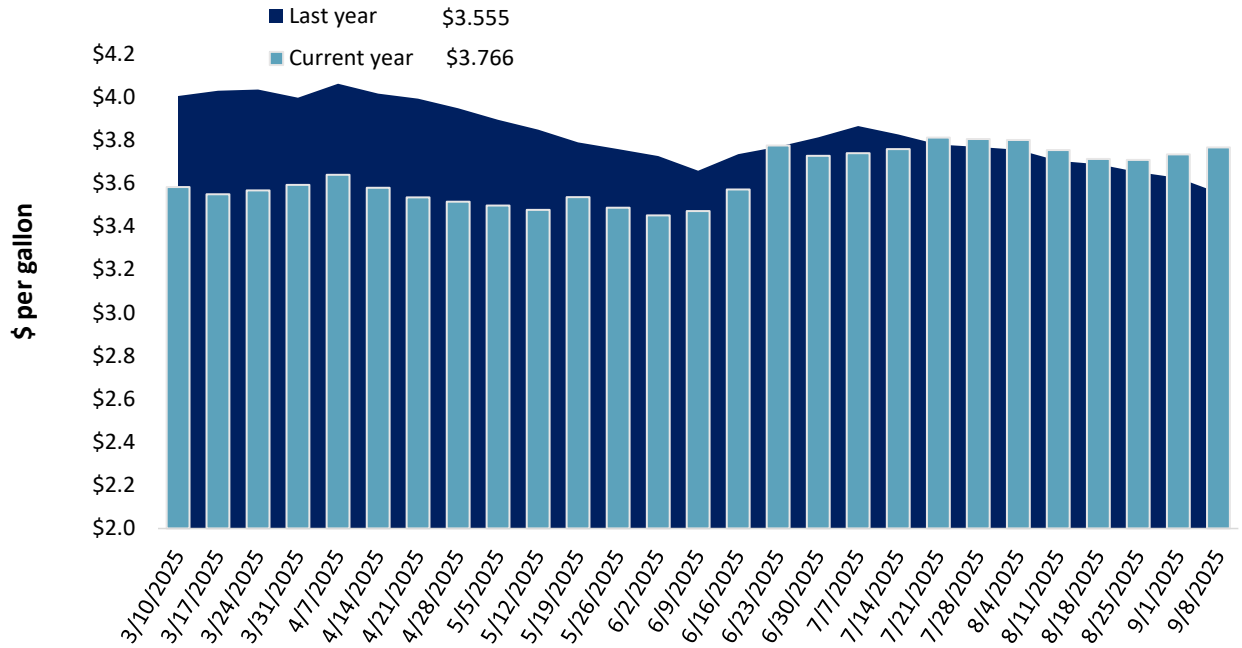
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 09/08/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.772	0.022	0.153
	New England	3.955	0.007	0.084
	Central Atlantic	3.937	0.025	0.090
	Lower Atlantic	3.693	0.024	0.185
II	Midwest	3.754	0.032	0.226
III	Gulf Coast	3.404	0.037	0.214
IV	Rocky Mountain	3.754	0.011	0.187
V	West Coast	4.533	0.049	0.276
	West Coast less California	4.163	0.051	0.326
	California	4.958	0.044	0.219
Total	United States	3.766	0.032	0.211

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 September 8, the U.S. average diesel fuel price increased 3.2 cents from the previous week to $3.766 per gallon, 21.1 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 8/28/2025	2,481	674	1,392	1,302	77	5,926	1,864	1,092	8,882
	This week year ago	1,123	742	1,603	1,164	60	4,691	1,768	1,008	7,468
	Last 4 wks. as % of same period 2023/24	234	114	100	119	122	139	239	187	169
Current shipped (cumulative) exports sales	2024/25 YTD	2,677	1,092	1,653	955	116	6,492	68,329	49,753	124,574
	2023/24 YTD	1,355	980	1,668	1,390	94	5,486	54,010	44,361	103,857
	YTD 2024/25 as % of 2023/24	198	111	99	69	123	118	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 8/28/2025	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	6,885	23,318	22,578	3	17,746
Japan	2446	13,511	11,132	21	9,366
China	0	33	2,822	-99	8,233
Colombia	1597	7,653	6,378	20	4,383
Korea	1139	6,243	2,415	159	1,565
Top 5 importers	12,066	50,757	45,324	12	41,293
Total U.S. corn export sales	20,892	70,194	55,778	26	51,170
% of YTD current month's export projection	29%	98%	97%	-	-
Change from prior week	2,117	-281	-173	-	-
Top 5 importers' share of U.S. corn export sales	58%	72%	81%	-	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 8/28/2025	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	24,416	-8	28,636
Mexico	1,946	5,003	4,818	4	4,917
Japan	276	2,148	2,193	-2	2,231
Egypt	276	3,636	1,453	150	2,228
Indonesia	183	2,152	2,286	-6	1,910
Top 5 importers	2,682	35,417	35,167	1	39,922
Total U.S. soybean export sales	8,046	50,845	45,369	12	51,302
% of YTD current month's export projection	17%	100%	98%	-	-
Change from prior week	818	-24	-228	-	-
Top 5 importers' share of U.S. soybean export sales	33%	70%	78%	-	78%
USDA forecast, August 2025	46,403	51,029	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 8/28/2025	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	2,124	1,718	24	3,358
Philippines	1,221	1,325	-8	2,473
Japan	888	844	5	2,045
China	0	139	-100	1,137
Korea	865	979	-12	1,674
Taiwan	491	453	8	935
Thailand	298	298	-0	667
Nigeria	834	198	320	629
Indonesia	531	436	22	518
Colombia	357	233	54	489
Top 10 importers	7,608	6,623	15	13,926
Total U.S. wheat export sales	12,418	10,178	22	19,135
% of YTD current month's export projection	52%	45%	-	-
Change from prior week	313	307	-	-
Top 10 importers' share of U.S. wheat export sales	61%	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.

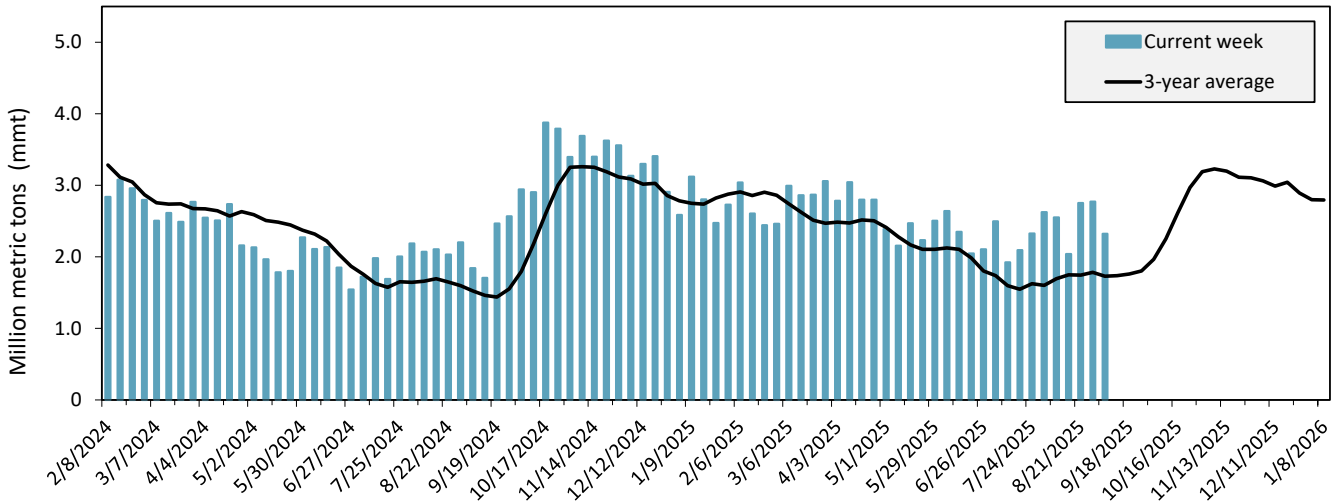
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 09/04/2025	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	178	306	58	16,179	11,642	139	303	449	13,987
	Soybeans	0	0	n/a	1,966	2,669	74	n/a	n/a	10,445
	Wheat	202	288	70	7,691	7,810	98	106	114	11,453
	All grain	380	594	64	25,953	23,207	112	137	146	37,186
Mississippi Gulf	Corn	924	765	121	25,393	18,707	136	110	149	27,407
	Soybeans	350	323	108	13,300	13,510	98	119	112	29,741
	Wheat	94	233	40	2,957	3,542	83	160	142	4,523
	All grain	1,368	1,321	104	41,690	35,818	116	117	135	61,789
Texas Gulf	Corn	27	37	73	393	379	104	213	216	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	66	175	38	3,231	1,211	267	510	481	1,940
	All grain	93	274	34	4,207	4,257	99	164	178	6,965
Interior	Corn	311	301	103	9,997	9,453	106	120	170	13,463
	Soybeans	100	165	61	4,694	4,863	97	111	138	8,059
	Wheat	53	89	59	2,205	2,168	102	100	107	2,989
	All grain	464	560	83	17,229	16,638	104	114	147	24,791
Great Lakes	Corn	0	0	n/a	64	0	n/a	n/a	n/a	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	10	18	56	193	335	58	62	123	653
	All grain	10	18	56	258	353	73	62	85	1,060
Atlantic	Corn	3	1	n/a	246	213	116	685	814	410
	Soybeans	2	3	81	497	440	113	-	77	1,272
	Wheat	0	1	n/a	53	65	81	12	23	73
	All grain	6	5	119	796	717	111	111	123	1,754
All Regions	Corn	1,443	1,410	102	52,273	40,393	129	131	179	56,109
	Soybeans	452	491	92	20,667	21,553	96	108	103	50,865
	Wheat	425	804	53	16,330	15,130	108	133	141	21,631
	All grain	2,320	2,772	84	90,237	81,043	111	123	143	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.

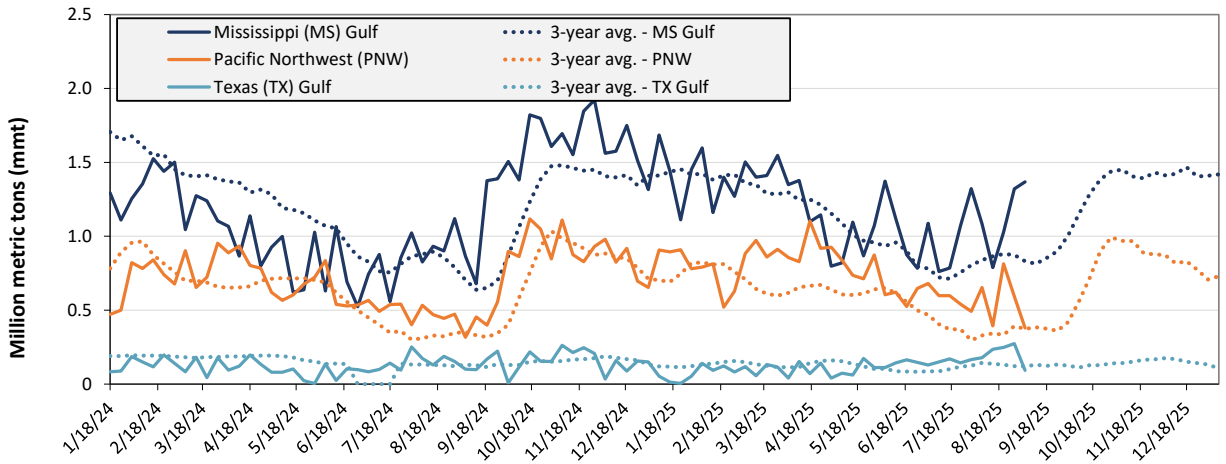
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Sep. 04: 2.3 mmt of grain inspected, down 16 percent from the previous week, up 19 percent from the same week last year, and up 34 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 09/04/25 inspections (mmt):
MS Gulf: 1.37
PNW: 0.38
TX Gulf: 0.09

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 4	down 66	down 8	down 36
Last year (same 7 days)	up 38	down 14	up 33	up 24
3-year average (4-week moving average)	up 64	down 22	up 54	up 2

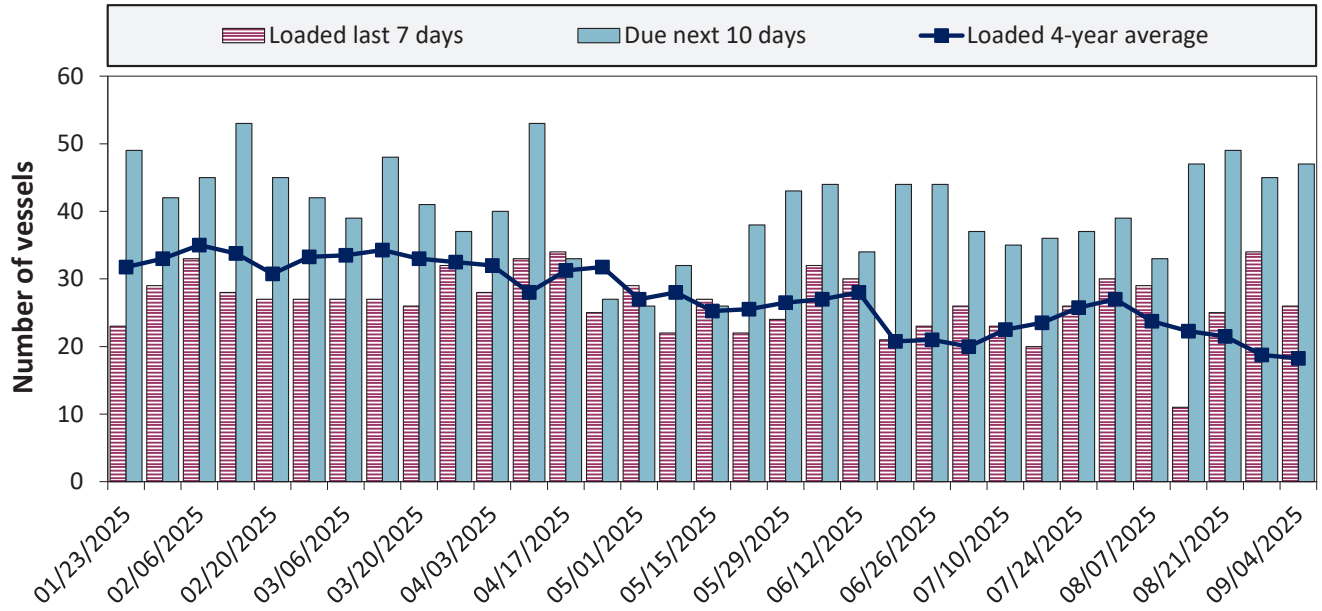
Source: USDA, Federal Grain Inspection Service.

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
9/4/2025	24	26	47	10
8/28/2025	28	34	45	9
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.

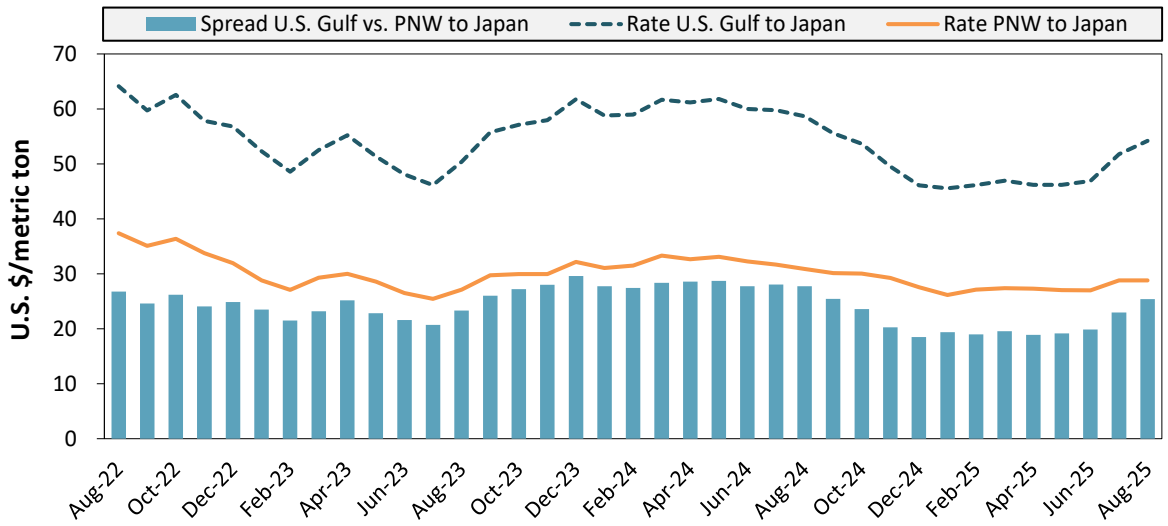
Figure 19. U.S. Gulf vessel loading activity



Week ending 09/04/25, number of vessels	Loaded	Due
Change from last year	8%	-6%
Change from 4-year average	43%	25%

Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.
Source: USDA, Agricultural Marketing Service.

Figure 20. U.S. Grain vessel rates, U.S. to Japan



Ocean rates	U.S. Gulf	PNW	Spread
August 2025	$54.19	$28.81	$25.38
Change from August 2024	-8%	-7%	-6%
Change from 4-year average	-15%	-17%	-11%

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

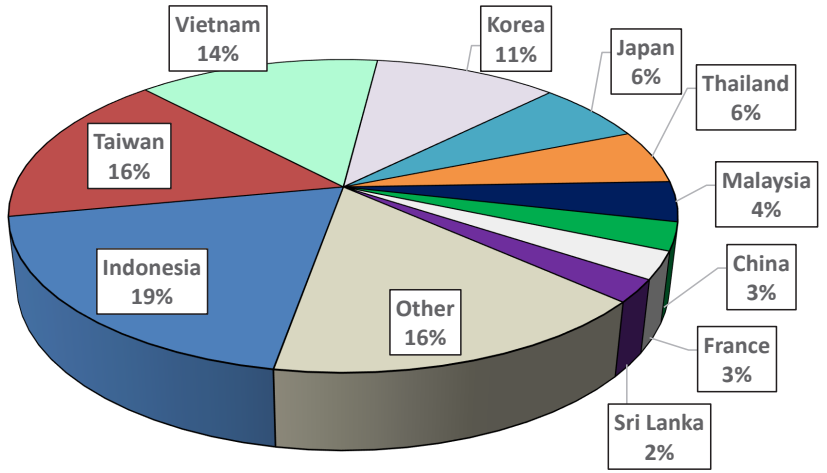
Table 20. Ocean freight rates for selected shipments, week ending 9/6/2025

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 12, 2025	Oct 1/10, 2025	58,000	63.75
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	Sep 03, 2025	Nov 1/10, 2025	46,000	49.00
PNW	Taiwan	Wheat	Aug 28, 2025	Oct 1/10, 2025	46,000	48.00
PNW	Taiwan	Wheat	Jul 23, 2025	Sep 1/10, 2025	45,000	46.75
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	Jul 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

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.

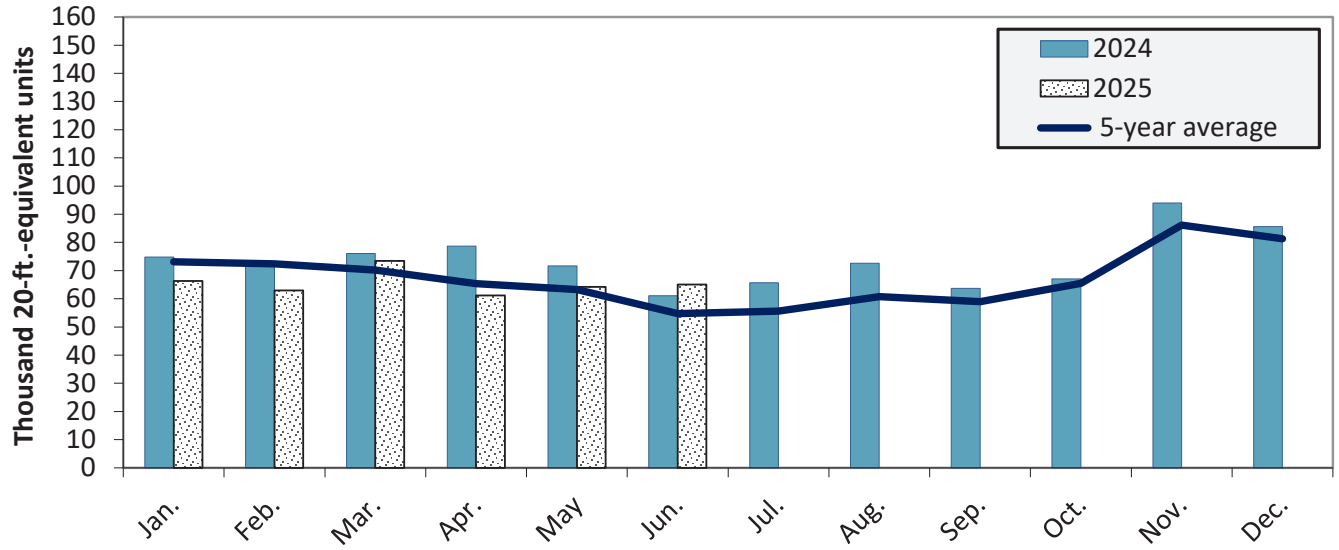
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-June 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 June 2025 were up 6.5 percent from last year and up 18.8 percent from the 5-year average.

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

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Additional Transportation Research and Analysis resources include the ***Grain Truck and Ocean Rate Advisory (GTOR)***, the ***Mexico Transport Cost Indicator Report***, and the ***Brazil Soybean Transportation Report***.

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