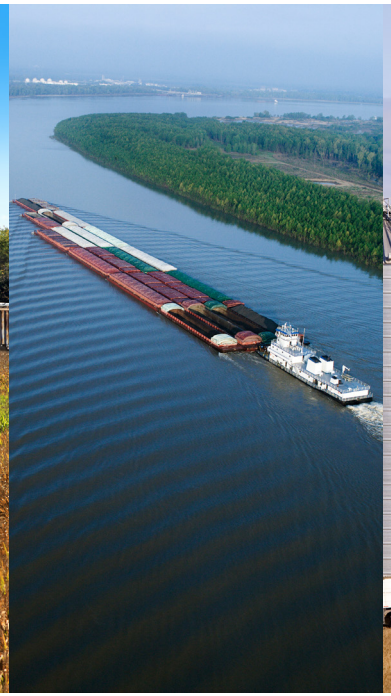
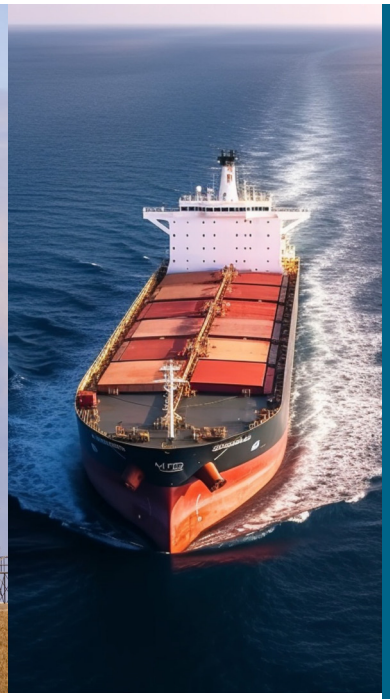
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



# Grain Transportation Report

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**September 18, 2025**
**A weekly publication of the Agricultural Marketing Service**
**www.ams.usda.gov/GTR**

**USDA Projects Even Larger Corn and Soybean Supplies Than Last Year.** In the September Crop Production report, USDA's National Agricultural Statistics Service (NASS) forecasted a harvest of 16.8 billion bushels (bbu) of corn and 4.3 bbu of soybeans in marketing year (MY) 2025/26—each up less than 1 percent from NASS's August forecast. If realized, the projected record-high corn production would be 13 percent more than last year, and soybean production would be 2 percent less. The net increase over last year would generate the following additional transportation demand (relative to last year): 100,000 rail carloads; 2,600 barges; and 1.4 million trucks (assuming 2022 corn modal shares).

States forecasted to have the largest year-to-year increases in corn and soybean production include Minnesota, +368 million bushels (mbu) (+22 percent); Iowa, +232 mbu (+7 percent); Nebraska, +156 mbu (+7 percent); South Dakota, +143 mbu (+13 percent); and Kansas, +110 mbu (+12 percent).

In terms of end use, USDA's September World Agricultural Supply and Demand Estimates (WASDE) report projects multiple record highs will be set in MY 2025/26, including those for corn exports and for domestic corn and soybean consumption.

**Grain Vessel Activity Up in Last 4 Weeks**. In the last 4 weeks—from the week ending August 21 to week ending September 11—an average of 29 oceangoing grain vessels per week were loaded in the U.S. Gulf. Also, for the 4 weeks ending September 11, an average of 49 vessels were expected in the next 10 days in the U.S. Gulf, and an average of 10 vessels were at berth (loading or waiting to load) in the Pacific Northwest (PNW). These numbers were up from the prior 4 weeks, when an average of 24 oceangoing vessels were loaded per week in the U.S. Gulf and an average of 8 vessels per week were at berth in PNW.

USDA's September WASDE report projects corn exports for marketing year (MY) 2025/26 at 3.0 billion bushels (adjusted up 100 million bushels (mbu) from August), reflecting U.S. export competitiveness and robust early-season demand. Also, the MY 2025/26 wheat exports projection rose to 900 mbu (up 25 mbu from August), based on continued strong sales and shipments of hard red winter wheat.

For the week ending September 11, the ocean freight rate per metric ton of grain was $57.25 from the U.S. Gulf to Japan and $29.75 from the PNW to Japan—up 25 percent and 12 percent, respectively, from the beginning of the year.

**More Draft and Tow Size Restrictions Take Effect on Mississippi River.** Earlier this month, the U.S. Coast Guard (USCG) restricted drafts and tow sizes on the Mississippi River following an extra-dry August (*Grain Transportation Report (GTR), September 4, 2025, first highlight*). Since then, river levels have continued to fall. As of September 18, the river gauge at Memphis, TN, had fallen to –5.5 feet (down from 0 feet on September 2). Without more precipitation, Memphis river levels are forecast to fall to –8 feet by the end of the month.

On September 15, USCG applied further draft and tow size restrictions on the lower Mississippi River. For southbound traffic, draft levels may not exceed 10.5 feet (near Memphis), and tows may not be more than 6 barges wide. For northbound traffic, draft levels may not exceed 10 feet, and tows may not exceed 4-6 barges wide (depending on the load size) and 7 barges long.

Additionally, within the next day or so, the U.S. Army Corps of Engineers expects to begin dredging at mile marker 711 (south of Memphis, TN) and mile marker 921 (near Hickman, KY). According to *Waterways Journal*, river closures near mile marker 711 are expected during dredging.

*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 September 4, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 36.91 million metric tons (mmt), up 18 percent from the same time last year.

Net **corn export sales** for MY 2025/26, which began September 1, were 0.54 mmt. Net **soybean export sales** for MY 2025/26, which also began September 1, were 0.54 mmt. Net **wheat export sales** for MY 2025/26 were 0.31 mmt, down 2 percent from last week.

## Rail

U.S. Class I railroads originated 22,201 **grain carloads** during the week ending September 6. This was a 6-percent decrease from the previous week, 3 percent fewer than last year, and 5 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $29 above tariff for the week ending September 11. This was $75 more than last week and $713 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $75 above tariff. This was $106 more than last week and $575 lower than this week last year.

## Barge

For the week ending September 13, **barged grain movements** totaled 251,550 tons. This was 30 percent less than the previous week and 32 percent less than the same period last year.

For the week ending September 13, 184 grain barges **moved down river**—47 fewer than last week. There were 854 grain barges **unloaded** in the New Orleans region, 17 percent more than last week.

## Ocean

For the week ending September 11, 30 **oceangoing grain vessels** were loaded in the Gulf—50 percent more than the same period last year. Within the next 10 days (starting September 12), 55 vessels were expected to be loaded—8 percent fewer than the same period last year.

As of September 11, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $57.25, up 2 percent from the previous week. The rate from the Pacific Northwest to Japan was $29.75 per mt, up 2 percent from the previous week.

## Fuel

For the week ending September 15, the **U.S. average diesel fuel price** decreased 2.7 cents from the previous week to $3.739 per gallon, 21.3 cents above the same week last year.

# Soybean Transportation Costs Fell in United States, Rose in Brazil—for Second Quarter 2025

The world's two leading producers of soybeans, the United States and Brazil, have long competed for the same major overseas markets—namely, China and Europe. Given these destinations' status as top soybean importers, low transportation and landed costs of soybeans to China and Europe are essential to the competitiveness of both the United States and Brazil. This article compares quarterly and yearly changes in the costs of moving soybeans from the United States and Brazil to Shanghai, China (table 1), and to Hamburg, Germany (table 2).

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

| Route | Cost | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change Yr. to yr. | Percent change Qtr. to qtr. | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change Yr. to yr. | Percent change Qtr. to qtr. |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Minneapolis, MN --$/mt-- | | | | | Davenport, IA --$/mt-- | | | | |
| United States via U.S. Gulf | Truck | 16.47 | 21.68 | 18.07 | 9.71 | -16.65 | 16.47 | 21.68 | 18.07 | 9.71 | -16.65 |
| | Rail | - | 42.36 | - | - | - | - | 26.50 | - | - | - |
| | Barge | 24.29 | 18.65 | 36.64 | 50.84 | 96.46 | 19.18 | 18.65 | 29.50 | 53.81 | 58.18 |
| | Ocean | 59.66 | 44.57 | 45.67 | -23.45 | 2.47 | 59.66 | 44.57 | 45.67 | -23.45 | 2.47 |
| | Total transportation | 100.42 | 127.26 | 100.38 | -0.04 | -21.12 | 95.31 | 111.40 | 93.24 | -2.17 | -16.30 |
| | Farm value | 417.65 | 358.37 | 366.33 | -12.29 | 2.22 | 437.25 | 365.72 | 376.01 | -14.01 | 2.81 |
| | Landed cost | 518.07 | 485.63 | 466.71 | -9.91 | -3.90 | 532.56 | 477.12 | 469.25 | -11.89 | -1.65 |
| | Transport % of landed cost | 19.38 | 26.21 | 21.51 | 2.12 | -4.70 | 17.90 | 23.35 | 19.87 | 1.97 | -3.48 |
| Route | Cost | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change Yr. to yr. | Percent change Qtr. to qtr. | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change Yr. to yr. | Percent change Qtr. to qtr. |
| | | Fargo, ND --$/mt-- | | | | | Sioux Falls, SD --$/mt-- | | | | |
| United States via PNW | Truck | 16.47 | 21.68 | 18.07 | 9.71 | -16.65 | 16.47 | 21.68 | 18.07 | 9.71 | -16.65 |
| | Rail | 64.79 | 61.59 | 61.78 | -4.65 | 0.29 | 66.08 | 62.71 | 62.92 | -4.78 | 0.33 |
| | Ocean | 31.77 | 26.25 | 26.62 | -16.21 | 1.41 | 31.77 | 26.25 | 26.62 | -16.21 | 1.41 |
| | Total transportation | 113.03 | 109.52 | 106.47 | -5.80 | -2.79 | 114.32 | 110.64 | 107.61 | -5.87 | -2.74 |
| | Farm value | 400.51 | 346.49 | 356.90 | -10.89 | 3.00 | 420.10 | 358.86 | 365.97 | -12.89 | 1.98 |
| | Landed cost | 513.54 | 456.01 | 463.37 | -9.77 | 1.61 | 534.42 | 469.50 | 473.58 | -11.38 | 0.87 |
| | Transport % of landed cost | 22.01 | 24.02 | 22.98 | 0.97 | -1.04 | 21.39 | 23.57 | 22.72 | 1.33 | -0.84 |
| Route | Cost | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change Yr. to yr. | Percent change Qtr. to qtr. | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change Yr. to yr. | Percent change Qtr. to qtr. |
| | | North MT - Santos --$/mt-- | | | | | South GO - Paranagua --$/mt-- | | | | |
| Brazil | Truck | 91.10 | 83.54 | 87.35 | -4.12 | 4.56 | 53.05 | 50.71 | 50.98 | -3.90 | 0.53 |
| | Ocean | 33.30 | 36.00 | 37.00 | 11.11 | 2.78 | 34.80 | 37.50 | 38.50 | 10.63 | 2.67 |
| | Total transportation | 124.40 | 119.54 | 124.35 | -0.04 | 4.02 | 87.85 | 88.21 | 89.48 | 1.86 | 1.44 |
| | Farm Value | 366.79 | 317.36 | 325.53 | -11.25 | 2.57 | 367.50 | 324.60 | 334.59 | -8.96 | 3.08 |
| | Landed Cost | 491.19 | 436.90 | 449.88 | -8.41 | 2.97 | 455.35 | 412.81 | 424.07 | -6.87 | 2.73 |
| | Transport % of landed cost | 25.33 | 27.36 | 27.64 | 2.31 | 0.28 | 19.29 | 21.37 | 21.10 | 1.81 | -0.27 |

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

**Quarter-to-Quarter Transportation Costs.** From first quarter 2025 to second quarter 2025 (quarter to quarter), costs for exporting U.S. soybeans through the U.S. Gulf to China (table 1) and Germany (table 2) decreased. This dip was in line with the typical seasonal pattern: each spring, the Upper Mississippi River reopens for navigation to New Orleans after being closed for most of the first quarter. Costs to ship soybeans through the Pacific Northwest (PNW) to China also decreased (table 1). Truck rates fell for all U.S. routes. Rail rates (public tariff, plus fuel surcharge) rose slightly for shipments out of the PNW to China. Brazil's costs for exporting soybeans—to China and Germany—rose in response to higher truck and ocean freight rates.

**Year-to-Year Transportation Costs.** From second quarter 2024 to second quarter 2025 (year to year), transportation costs decreased for

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

| Route | Cost | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change | | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Yr. to yr. | Qtr. to qtr. | | | | Yr. to yr. | Qtr. to qtr. |
| | | Minneapolis, MN | | | | | Davenport, IA | | | | |
| | | --$/mt-- | | | | | --$/mt-- | | | | |
| United States via U.S. Gulf | Truck | 16.47 | 21.68 | 18.07 | 9.71 | -16.65 | 16.47 | 21.68 | 18.07 | 9.71 | -16.65 |
| | Rail | - | 42.36 | - | - | - | - | 26.50 | - | - | - |
| | Barge | 24.29 | 18.65 | 36.64 | 50.84 | 96.46 | 19.18 | 18.65 | 29.50 | 53.81 | 58.18 |
| | Ocean | 27.94 | 22.53 | 22.71 | -18.72 | 0.80 | 27.94 | 22.53 | 22.71 | -18.72 | 0.80 |
| | Total transportation | 68.70 | 105.22 | 77.42 | 12.69 | -26.42 | 63.59 | 89.36 | 70.28 | 10.52 | -21.35 |
| | Farm value | 417.65 | 358.37 | 366.33 | -12.29 | 2.22 | 437.25 | 365.72 | 376.01 | -14.01 | 2.81 |
| | Landed cost | 486.35 | 463.59 | 443.75 | -8.76 | -4.28 | 500.84 | 455.08 | 446.29 | -10.89 | -1.93 |
| | Transport % of landed cost | 14.13 | 22.70 | 17.45 | 3.32 | -5.25 | 12.70 | 19.64 | 15.75 | 3.05 | -3.89 |
| Route | Cost | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change | | 2024 2nd qtr. | 2025 1st qtr. | 2025 2nd qtr. | Percent change | |
| | | | | | Yr. to yr. | Qtr. to qtr. | | | | Yr. to yr. | Qtr. to qtr. |
| | | North MT - Santos | | | | | South GO - Paranagua | | | | |
| | | --$/mt-- | | | | | --$/mt-- | | | | |
| Brazil | Truck | 91.10 | 83.54 | 87.35 | -4.12 | 4.56 | 53.05 | 50.71 | 50.98 | -3.90 | 0.53 |
| | Ocean | 31.30 | 33.90 | 34.75 | 11.02 | 2.51 | 31.00 | 33.60 | 34.50 | 11.29 | 2.68 |
| | Total transportation | 122.40 | 117.44 | 122.10 | -0.25 | 3.97 | 84.05 | 84.31 | 85.48 | 1.70 | 1.39 |
| | Farm Value | 366.79 | 317.36 | 325.53 | -11.25 | 2.57 | 367.50 | 324.60 | 334.69 | -8.93 | 3.11 |
| | Landed Cost | 489.19 | 434.80 | 447.63 | -8.50 | 2.95 | 451.55 | 408.91 | 420.17 | -6.95 | 2.75 |
| | Transport % of landed cost | 25.02 | 27.01 | 27.28 | 2.26 | 0.27 | 18.61 | 20.62 | 20.34 | 1.73 | -0.27 |

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

shipments from the United States to China, but increased for shipments to Europe. For U.S.-to-China shipments, lower rail and ocean freight rates pushed down total transportation costs, outweighing the effect of higher truck and barge rates. For U.S. shipments to Germany, higher truck and barge rates outweighed the effect of lower ocean freight rates.

For Brazil, transportation costs increased for shipments from South Goiás (GO), in response to higher ocean rates, and remained fairly stable for shipments from North Mato Grosso (MT).

**Quarter-to-Quarter Landed Costs.** Quarter to quarter, landed costs fell for shipments from the U.S. Gulf to China and Germany, but rose for shipments through the PNW to China, as higher North Dakota and South Dakota soybean farm values pushed up landed costs.

For shipping through the U.S. Gulf, landed-cost decreases reflected falling transportation costs. In second quarter 2025, transportation comprised 20-23 percent of U.S. landed costs for shipping to China (table 1) and 16-17 percent for shipping to Germany (table 2). In Brazil, landed costs rose for shipments to both China and Europe.

In Brazil, landed costs rose because of both higher transportation costs and higher farm values. In second quarter 2025, transportation comprised 21-28 percent of Brazil's total landed costs for shipments to China (table 1) and 20-27 percent to Germany (table 2).

**Year-to-Year Landed Costs.** Year to year, landed costs fell in both countries. For exports from the United States to China, the decrease reflected both lower transportation costs and lower soybean farm values. For exports from the United States to Germany, the decrease reflected lower farm values.

For exports from Brazil, landed costs fell in response to lower farm values or both falling transportation costs and farm values.

**U.S. Exports to China and Brazil's Exports Overall.** According to USDA/Foreign Agricultural Service's Global Agricultural Trade System data, China imported 0.71 million metric tons (mmt) of U.S. soybeans in second quarter 2025, which was down from 5.23 in the previous quarter and 0.88 mmt a year ago. According to the September 2025 *World Agriculture Supply and Demand Estimates (WASDE)*, total U.S. soybean exports in marketing year (MY) 2025/26 are projected to be 45.86 mmt, down from 51.03 mmt in MY 2024/25.

Brazil's soybean exports are projected at 112 mmt, up from 102.10 mmt in MY 2024/25. For more on soybean transportation, see *Brazil Soybean Transportation*.

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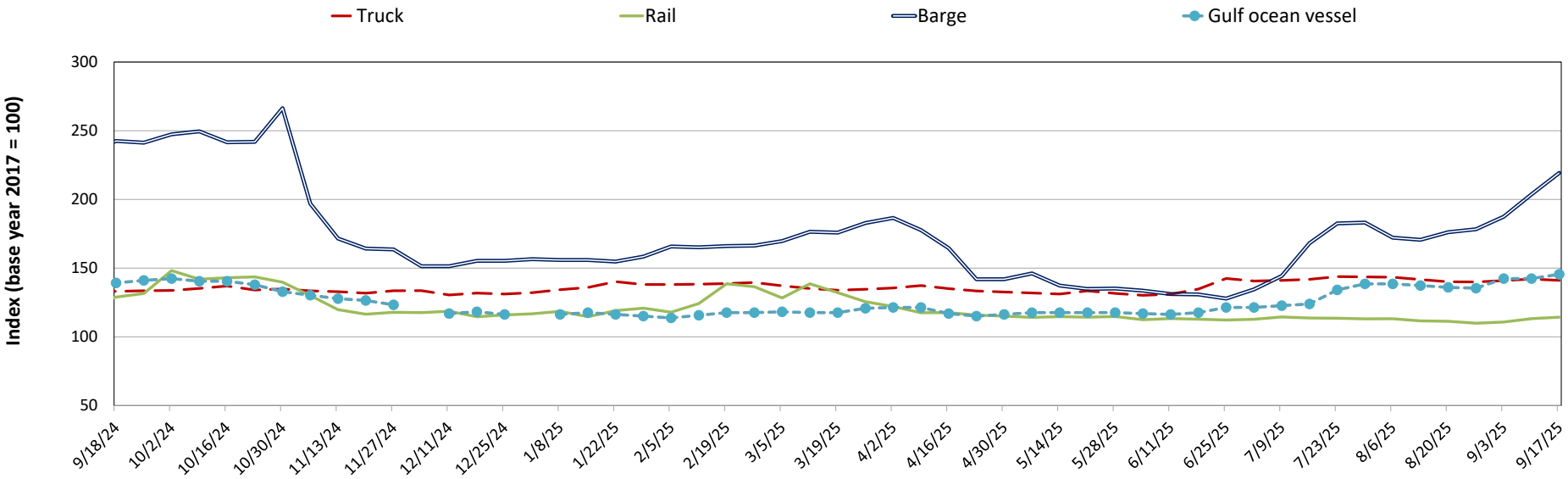
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

**Table 1. Grain transport cost indicators**

| For the week ending: | Truck | Rail | Barge | Ocean | |
|---|---|---|---|---|---|
| | | | | Gulf | Pacific |
| 09/17/25 | 141 | 114 | 219 | 146 | 141 |
| 09/10/25 | 142 | 113 | 204 | 142 | 139 |
| 09/18/24 | 133 | 129 | 242 | 139 | 140 |

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.

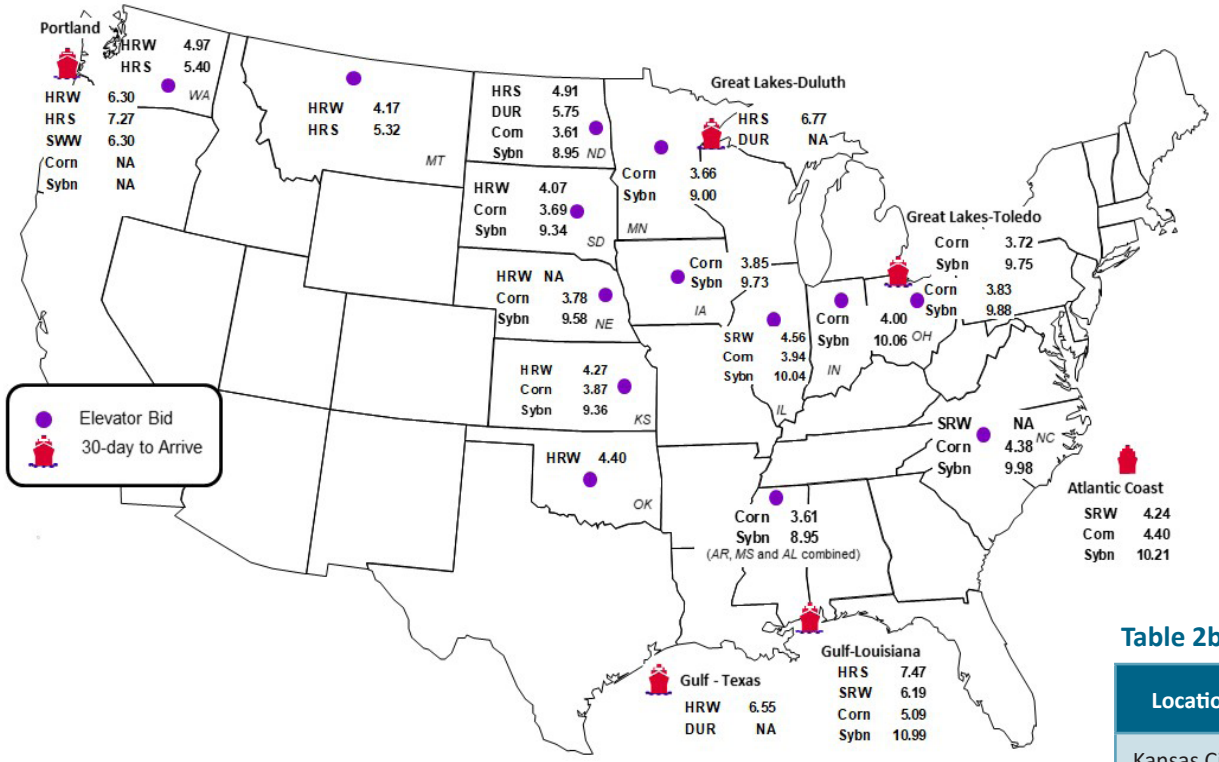
**Figure 1. Grain transportation cost indicators as of week ending 9/17/25**




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 | 9/12/2025 | 9/5/2025 |
|---|---|---|---|
| Corn | IL–Gulf | -1.15 | -1.07 |
| Corn | NE–Gulf | -1.31 | -1.23 |
| Soybean | IA–Gulf | -1.26 | -1.20 |
| HRW | KS–Gulf | -2.28 | -2.23 |
| HRS | ND–Portland | -2.36 | -2.39 |

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 | 9/12/2025 | Week ago 9/5/2025 | Year ago 9/13/2024 |
|---|---|---|---|---|---|
| Kansas City | Wheat | Dec | 5.146 | 5.052 | 5.830 |
| Minneapolis | Wheat | Dec | 5.718 | 5.660 | 6.354 |
| Chicago | Wheat | Dec | 5.234 | 5.192 | 5.790 |
| Chicago | Corn | Dec | 4.298 | 4.178 | 4.106 |
| Chicago | Soybean | Dec | 10.462 | 10.270 | 10.080 |

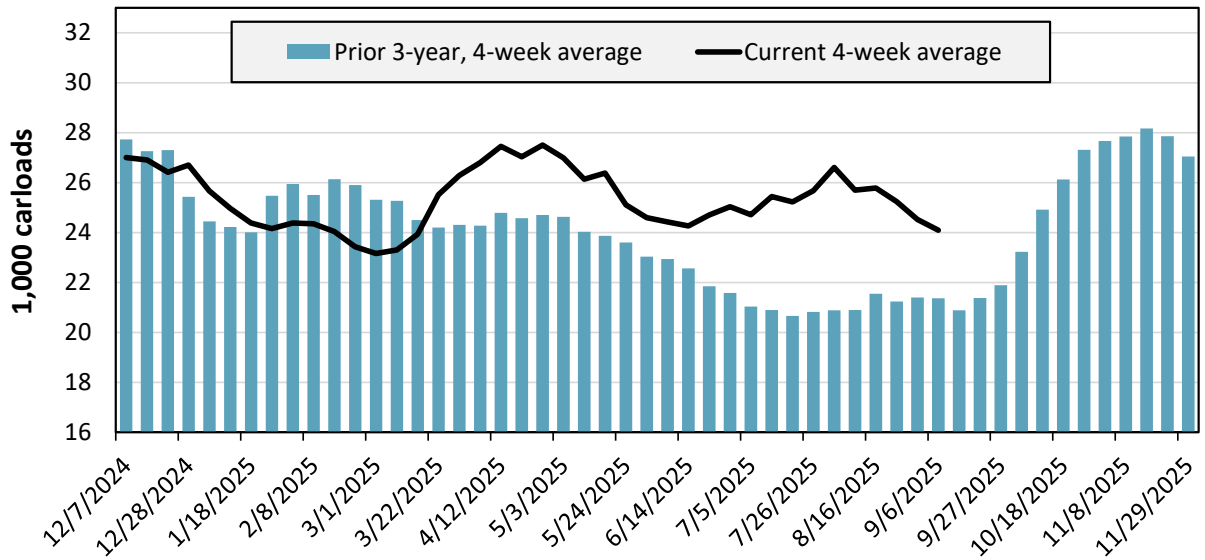
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

| For the week ending: 9/06/2025 | East | | West | | Central U.S. | | U.S. total |
|---|---|---|---|---|---|---|---|
| | CSXT | NS | BNSF | UP | CPKC | CN | |
| This week | 972 | 2,226 | 9,940 | 4,929 | 2,711 | 1,423 | 22,201 |
| This week last year | 1,533 | 2,182 | 9,839 | 5,998 | 2,343 | 1,049 | 22,944 |
| 2025 YTD | 54,910 | 98,450 | 394,495 | 206,398 | 99,312 | 50,395 | 903,960 |
| 2024 YTD | 59,497 | 96,348 | 372,331 | 184,120 | 95,987 | 33,568 | 841,851 |
| 2025 YTD as % of 2024 YTD | 92 | 102 | 106 | 112 | 103 | 150 | 107 |
| Last 4 weeks as % of 2024 | 65 | 78 | 105 | 106 | 129 | 135 | 103 |
| Last 4 weeks as % of 3-yr. avg. | 75 | 99 | 119 | 109 | 123 | 142 | 113 |
| Total 2024 | 87,911 | 143,353 | 557,544 | 279,532 | 142,383 | 58,512 | 1,269,235 |

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

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




For the 4 weeks ending September 6, grain carloads were down 2 percent from the previous week, up 3 percent from last year, and up 13 percent from the 3-year average.

Source: Surface Transportation Board.

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

| For the week ending: 9/5/2025 | | East | | West | | Central U.S. | | U.S. Average |
|---|---|---|---|---|---|---|---|---|
| | | CSX | NS | BNSF | UP | CN | CPKC | |
| Average grain unit train origin dwell times (hours) | This week | 24.4 | 17.5 | 9.3 | 13.9 | 8.9 | 38.0 | 18.7 |
| | Average over last 4 weeks | 20.0 | 23.5 | 11.8 | 14.0 | 8.1 | 40.8 | 19.7 |
| | Average of same 4 weeks last year | 23.7 | 25.4 | 15.6 | 20.5 | 9.9 | n/a | 19.0 |
| Average grain unit train speeds (miles per hour) | This week | 24.2 | 20.8 | 25.7 | 23.8 | 25.9 | 13.9 | 22.4 |
| | Average over last 4 weeks | 23.3 | 19.4 | 24.5 | 23.1 | 24.1 | 13.7 | 21.3 |
| | Average of same 4 weeks last year | 23.8 | 20.2 | 23.7 | 22.0 | 23.4 | n/a | 22.6 |

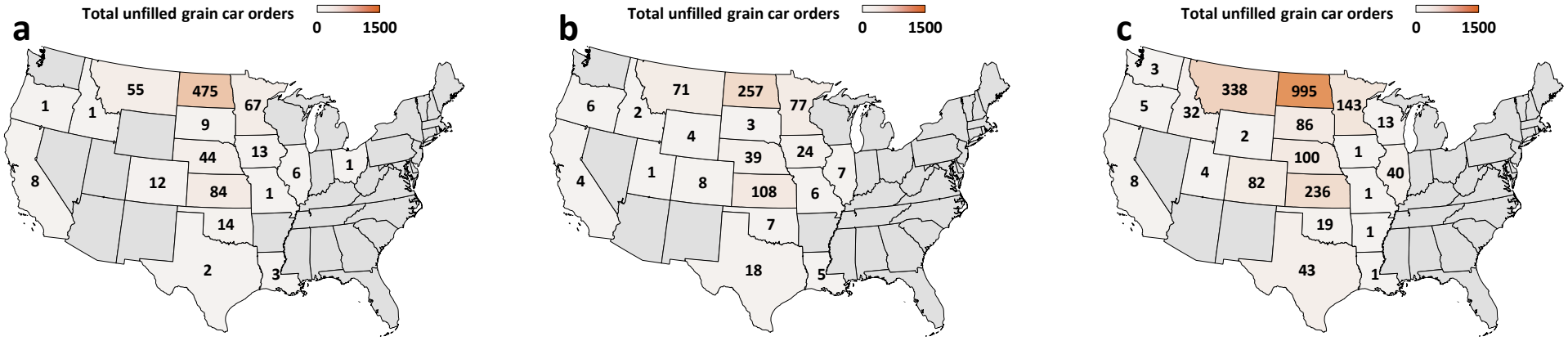
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

| For the week ending: 9/5/2025 | | 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 | 7 | 304 | 76 | 9 | 331 | 737 |
| | Average over last 4 weeks | 12 | 5 | 238 | 64 | 8 | 316 | 642 |
| | Average of same 4 weeks last year | 20 | 9 | 397 | 127 | 5 | n/a | 558 |
| Average number of loaded grain cars not moved in over 48 hours | This week | 38 | 219 | 320 | 75 | 7 | 604 | 1,263 |
| | Average over last 4 weeks | 24 | 155 | 287 | 68 | 7 | 561 | 1,102 |
| | Average of same 4 weeks last year | 28 | 143 | 554 | 138 | 3 | n/a | 866 |
| Average number of grain unit trains held | This week | 0 | 0 | 2 | 2 | 0 | 8 | 12 |
| | Average over last 4 weeks | 0 | 0 | 2 | 3 | 0 | 11 | 16 |
| | Average of same 4 weeks last year | 0 | 0 | 14 | 8 | 0 | n/a | 22 |
| Total unfilled manifest grain car orders | This week | 4 | 0 | 206 | 117 | 0 | 469 | 796 |
| | Average over last 4 weeks | 1 | 4 | 169 | 199 | 0 | 356 | 729 |
| | Average of same 4 weeks last year | 1 | 3 | 1,594 | 402 | 0 | n/a | 1,999 |

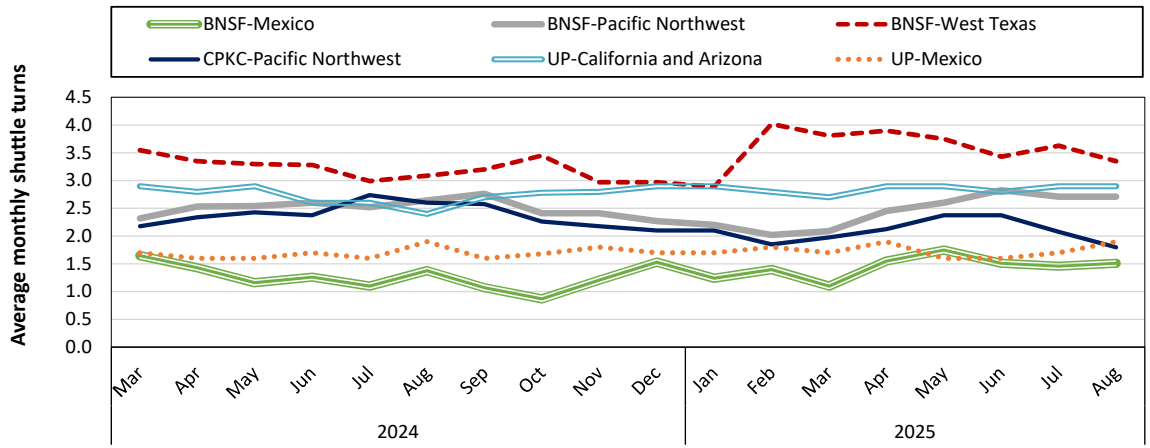
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

**Figure 4. Unfilled manifest grain car orders by State for the week ending 9/5/2025 (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**

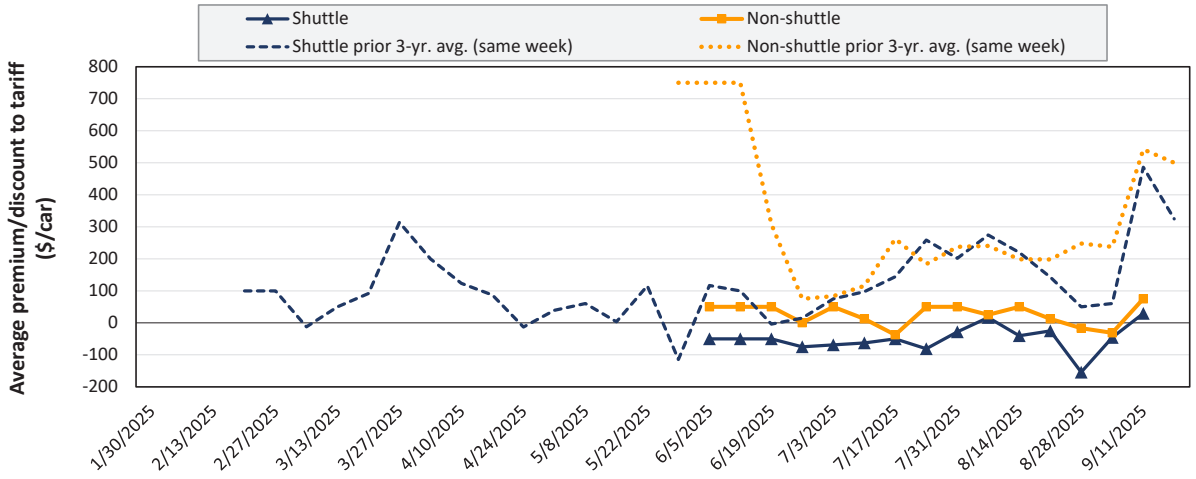



In August 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.4 to West Texas. CPKC's shuttle turns averaged 1.8 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.9 to Mexico.

Note: A "shuttle turn" refers to the number of trips completed per month by a single train. Additional data (including additional regions and planned turns) are available on AgTransport. 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



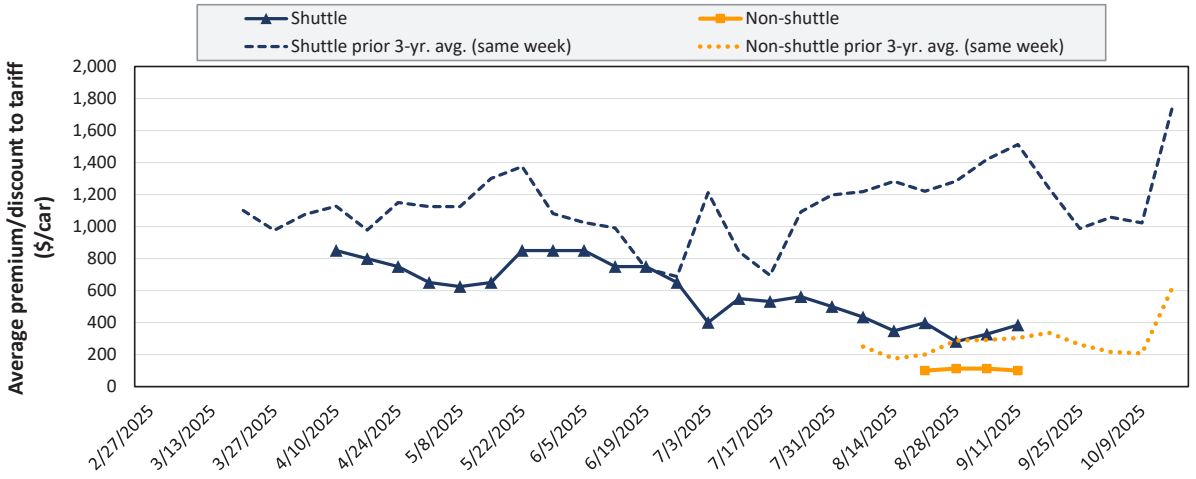

Average non-shuttle bids/offers rose $106 this week, and are at the peak.

Average shuttle bids/offers rose $75 this week and are at the peak.

| 9/11/2025 | BNSF | UP |
|---|---|---|
| Non-Shuttle | $75 | n/a |
| Shuttle | -$25 | $83 |

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



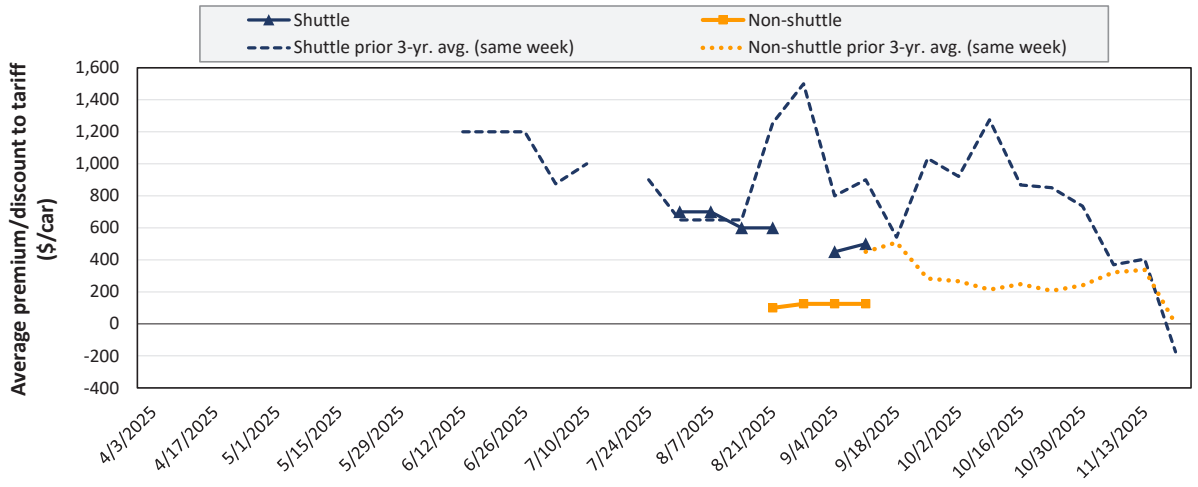

Average non-shuttle bids/offers fell $13 this week, and are $13 below the peak.

Average shuttle bids/offers rose $56 this week and are $466 below the peak.

| 9/11/2025 | BNSF | UP |
|---|---|---|
| Non-Shuttle | $125 | $75 |
| Shuttle | $469 | $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.

## 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.

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

| 9/11/2025 | BNSF | UP |
|---|---|---|
| Non-Shuttle | $150 | $100 |
| Shuttle | $500 | 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: 9/11/2025 | | Delivery period | | | | | |
|---|---|---|---|---|---|---|---|
| | | Sep-25 | Oct-25 | Nov-25 | Dec-25 | Jan-26 | Feb-26 |
| Non-shuttle | BNSF | 75 | 125 | 150 | n/a | n/a | n/a |
| | Change from last week | 37 | 0 | 0 | n/a | n/a | n/a |
| | Change from same week 2024 | -575 | -475 | -550 | n/a | n/a | n/a |
| | UP | n/a | 75 | 100 | 100 | n/a | n/a |
| | Change from last week | n/a | -25 | 0 | 0 | n/a | n/a |
| | Change from same week 2024 | n/a | -125 | n/a | n/a | n/a | n/a |
| Shuttle | BNSF | -25 | 469 | 500 | 550 | n/a | n/a |
| | Change from last week | 60 | 63 | 50 | n/a | n/a | n/a |
| | Change from same week 2024 | -900 | -1,315 | -700 | n/a | n/a | n/a |
| | UP | 83 | 300 | n/a | n/a | n/a | n/a |
| | Change from last week | 89 | 50 | n/a | n/a | n/a | n/a |
| | Change from same week 2024 | -525 | -833 | n/a | n/a | n/a | n/a |
| | CPKC | n/a | 100 | n/a | n/a | n/a | n/a |
| | Change from last week | n/a | 0 | n/a | n/a | n/a | n/a |
| | Change from same week 2024 | n/a | -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 |

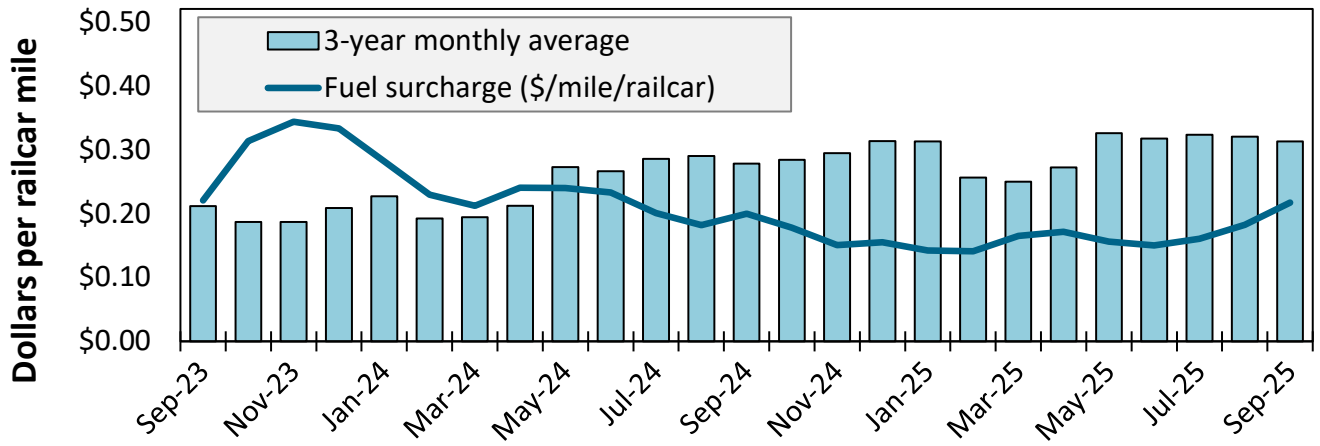
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage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

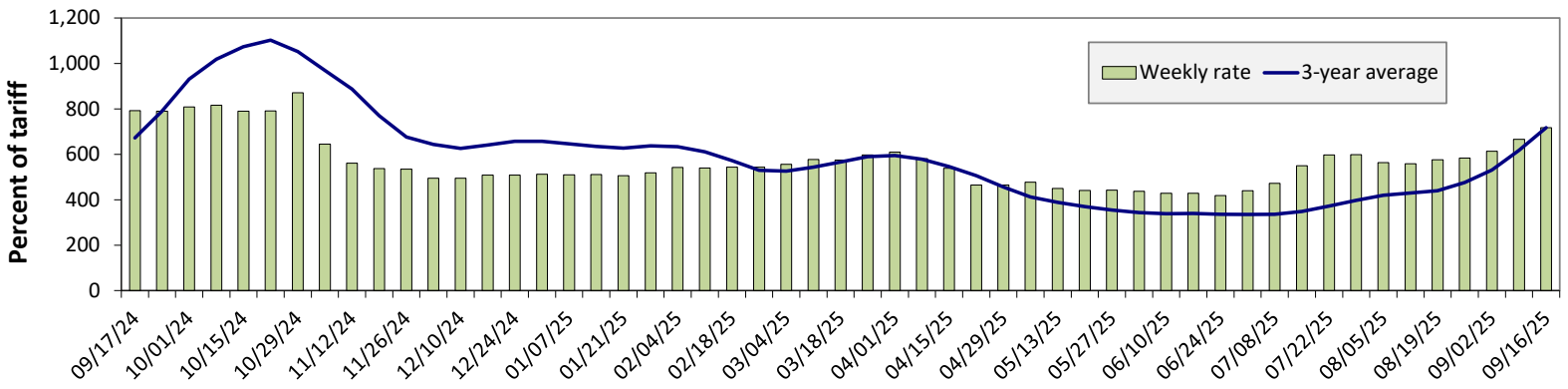
## Figure 9. Railroad fuel surcharges, North American weighted average




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 16: 8 percent higher than the previous week; 10 percent lower than last year; and there is no change from 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

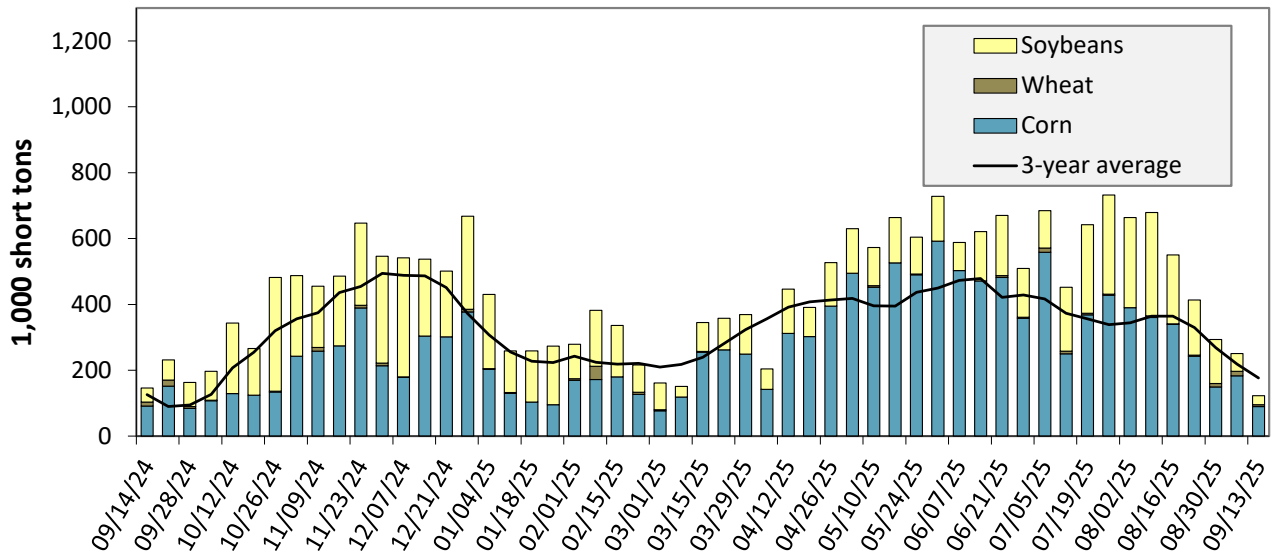
| Measure | Date | Twin Cities | Mid-Mississippi | Illinois River | St. Louis | Ohio River | Cairo-Memphis |
|---|---|---|---|---|---|---|---|
| Rate | 9/16/2025 | 709 | 714 | 717 | 615 | 675 | 600 |
| | 9/9/2025 | 678 | 669 | 666 | 582 | 664 | 584 |
| $/ton | 9/16/2025 | 43.89 | 37.98 | 33.27 | 24.54 | 31.66 | 18.84 |
| | 9/9/2025 | 41.97 | 35.59 | 30.90 | 23.22 | 31.14 | 18.34 |
| **Measure** | **Time Period** | **Twin Cities** | **Mid-Mississippi** | **Illinois River** | **St. Louis** | **Ohio River** | **Cairo-Memphis** |
| Current week % change from the same week | Last year | -3 | -9 | -10 | -24 | -16 | -27 |
| | 3-year avg. | -4 | -2 | -0 | -12 | -7 | -20 |
| Rate | October | 797 | 797 | 783 | 734 | 778 | 714 |
| | December | 0 | 131 | 564 | 463 | 532 | 429 |

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 13: 16 percent lower than last year and 30 percent lower than the 3-year average.

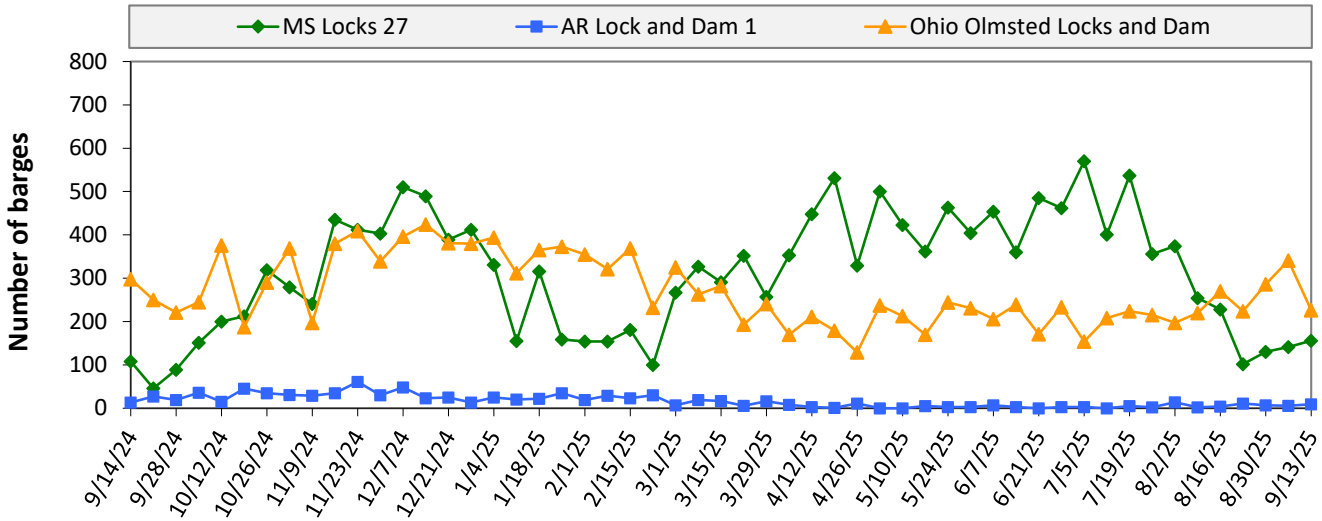
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

| For the week ending 09/13/2025 | Corn | Wheat | Soybeans | Other | Total |
|---|---|---|---|---|---|
| Mississippi River (Rock Island, IL (L15)) | 13 | 2 | 6 | 0 | 21 |
| Mississippi River (Winfield, MO (L25)) | 45 | 5 | 21 | 0 | 70 |
| Mississippi River (Alton, IL (L26)) | 81 | 5 | 27 | 0 | 112 |
| Mississippi River (Granite City, IL (L27)) | 90 | 5 | 28 | 0 | 123 |
| Illinois River (La Grange) | 39 | 0 | 10 | 0 | 49 |
| Ohio River (Olmsted) | 67 | 12 | 27 | 2 | 108 |
| Arkansas River (L1) | 8 | 7 | 6 | 0 | 21 |
| Weekly total - 2025 | 166 | 24 | 60 | 2 | 252 |
| Weekly total - 2024 | 215 | 35 | 117 | 0 | 367 |
| 2025 YTD | 14,184 | 1,016 | 7,675 | 133 | 23,008 |
| 2024 YTD | 10,516 | 1,303 | 7,203 | 170 | 19,192 |
| 2025 as % of 2024 YTD | 135 | 78 | 107 | 78 | 120 |
| Last 4 weeks as % of 2024 | 74 | 95 | 91 | 122 | 81 |
| 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.

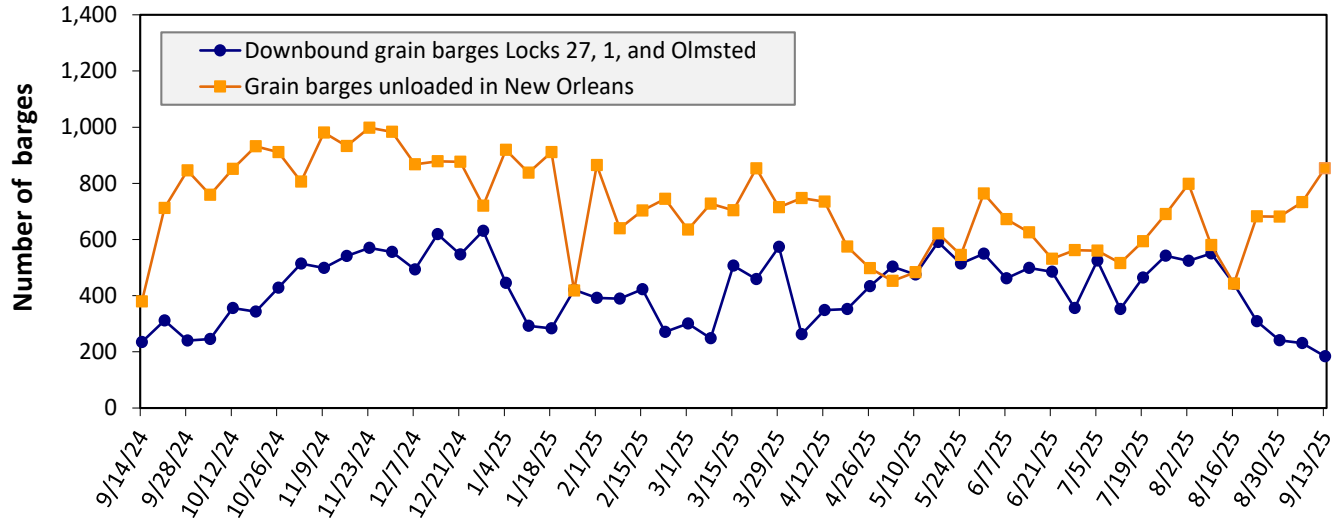
**Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam**




For the week ending September 13: 391 barges transited the locks, 97 barges fewer than the previous week, and 1 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 13: 184 barges moved down river, 47 fewer than the previous week; 854 grain barges unloaded in the New Orleans Region, 17 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.

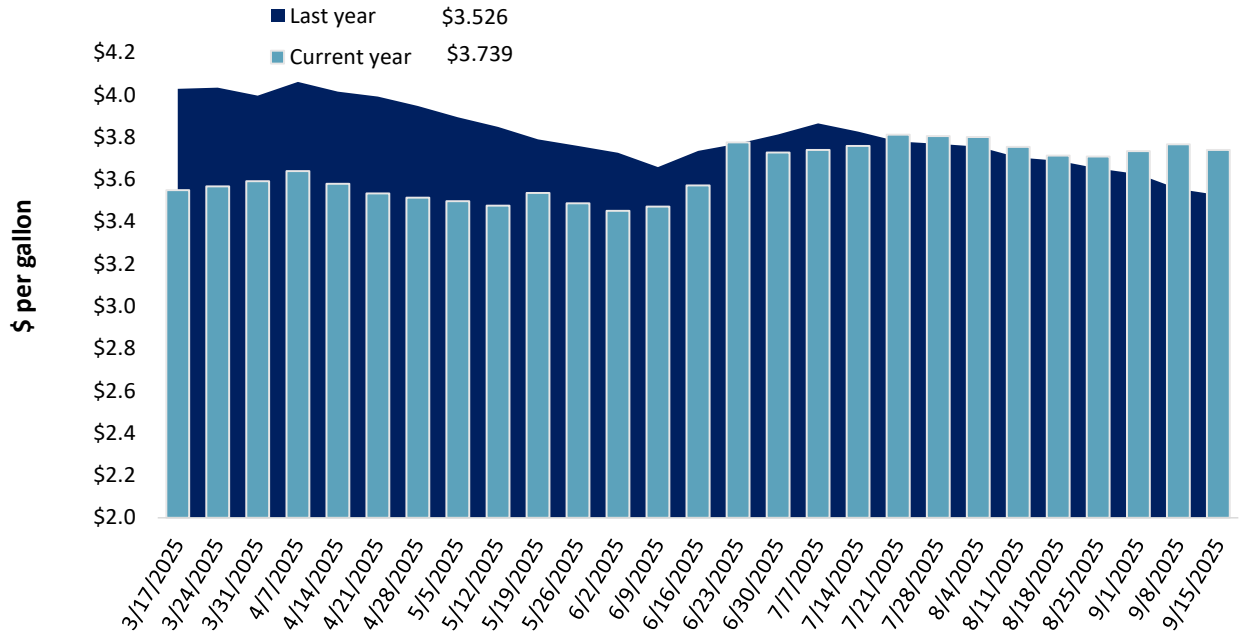
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

**Table 13. Retail on-highway diesel prices, week ending 09/15/2025 (U.S. $/gallon)**

| Region | Location | Price | Change from | |
|---|---|---|---|---|
| | | | Week ago | Year ago |
| I | East Coast | 3.748 | -0.024 | 0.163 |
| | New England | 3.961 | 0.006 | 0.143 |
| | Central Atlantic | 3.920 | -0.017 | 0.110 |
| | Lower Atlantic | 3.663 | -0.030 | 0.184 |
| II | Midwest | 3.710 | -0.044 | 0.229 |
| III | Gulf Coast | 3.389 | -0.015 | 0.217 |
| IV | Rocky Mountain | 3.722 | -0.032 | 0.134 |
| V | West Coast | 4.523 | -0.010 | 0.279 |
| | West Coast less California | 4.134 | -0.029 | 0.316 |
| | California | 4.971 | 0.013 | 0.238 |
| Total | United States | 3.739 | -0.027 | 0.213 |

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 15, the U.S. average diesel fuel price decreased 2.7 cents from the previous week to $3.739 per gallon, 21.3 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 9/04/2025 | 2,445 | 674 | 1,396 | 1,265 | 94 | 5,874 | 21,914 | 9,121 | 36,909 |
| | This week year ago | 1,141 | 682 | 1,518 | 1,236 | 48 | 4,624 | 12,803 | 13,930 | 31,357 |
| | Last 4 wks. as % of same period 2024/25 | 227 | 114 | 100 | 108 | 166 | 136 | 64 | 25 | 57 |
| Current shipped (cumulative) exports sales | 2025/26 YTD | 2,805 | 1,115 | 1,776 | 1,037 | 116 | 6,849 | 687 | 234 | 7,770 |
| | 2024/25YTD | 1,408 | 1,050 | 1,988 | 1,475 | 107 | 6,028 | 559 | 314 | 6,901 |
| | YTD 2025/26 as % of 2024/25 | 199 | 106 | 89 | 70 | 108 | 114 | 123 | 74 | 113 |
| | Total 2024/25 | 5,377 | 3,106 | 6,560 | 5,730 | 335 | 21,107 | 69,081 | 50,106 | 140,295 |
| | Total 2023/24 | 3,535 | 4,260 | 6,314 | 3,906 | 526 | 18,540 | 54,277 | 44,510 | 117,328 |

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 9/4/2025 | 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 | 7,603 | 6,734 | 13 | 19,839 |
| Japan | 2,684 | 1,435 | 87 | 10,478 |
| Colombia | 1,644 | 783 | 110 | 5,493 |
| Korea | 1,236 | 141 | 779 | 3,127 |
| Taiwan | 485 | 143 | 238 | 1,429 |
| Top 5 importers | 13,652 | 9,235 | 48 | 40,367 |
| Total U.S. corn export sales | 22,601 | 13,361 | 69 | 54,276 |
| % of YTD current month's export projection | 30% | 19% | - | - |
| Change from prior week | 540 | 666 | - | - |
| Top 5 importers' share of U.S. corn export sales | 60% | 69% | - | 74% |
| USDA forecast September 2025 | 75,569 | 71,886 | 5 | - |
| Corn use for ethanol USDA forecast, September 2025 | 142,240 | 138,049 | 3 | - |

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (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 9/4/2025 | 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 | | |
| China | 0 | 4,969 | -100 | 26,078 |
| Mexico | 2,004 | 1,159 | 73 | 4,762 |
| Japan | 385 | 415 | -7 | 2,107 |
| Egypt | 277 | 358 | -23 | 2,098 |
| Indonesia | 359 | 386 | -7 | 1,997 |
| Top 5 importers | 3,025 | 7,287 | -58 | 37,042 |
| Total U.S. soybean export sales | 9,354 | 14,245 | -34 | 48,941 |
| % of YTD current month's export projection | 20% | 28% | - | - |
| Change from prior week | 541 | 1,474 | - | - |
| Top 5 importers' share of U.S. soybean export sales | 32% | 51% | - | 76% |
| USDA forecast, September 2025 | 45,858 | 51,029 | -10 | - |

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (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 9/04/2025 | 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 | 12,723 | 10,652 | 19 | 3,358 |
| Philippines | 1,262 | 1,424 | -11 | 2,473 |
| Japan | 967 | 908 | 6 | 2,045 |
| China | 0 | 139 | -100 | 1,137 |
| Korea | 868 | 1,070 | -19 | 1,674 |
| Taiwan | 492 | 558 | -12 | 935 |
| Thailand | 299 | 298 | 0 | 667 |
| Nigeria | 834 | 224 | 273 | 629 |
| Indonesia | 601 | 442 | 36 | 518 |
| Colombia | 357 | 236 | 52 | 489 |
| Top 10 importers | 18,402 | 15,951 | 15 | 13,926 |
| Total U.S. wheat export sales | 12,723 | 10,652 | 19 | 19,135 |
| % of YTD current month's export projection | 52% | 47% | - | - |
| Change from prior week | 305 | 475 | - | - |
| Top 10 importers' share of U.S. wheat export sales | 145% | 150% | - | 73% |
| USDA forecast, September 2025 | 24,494 | 22,480 | 9 | - |

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.

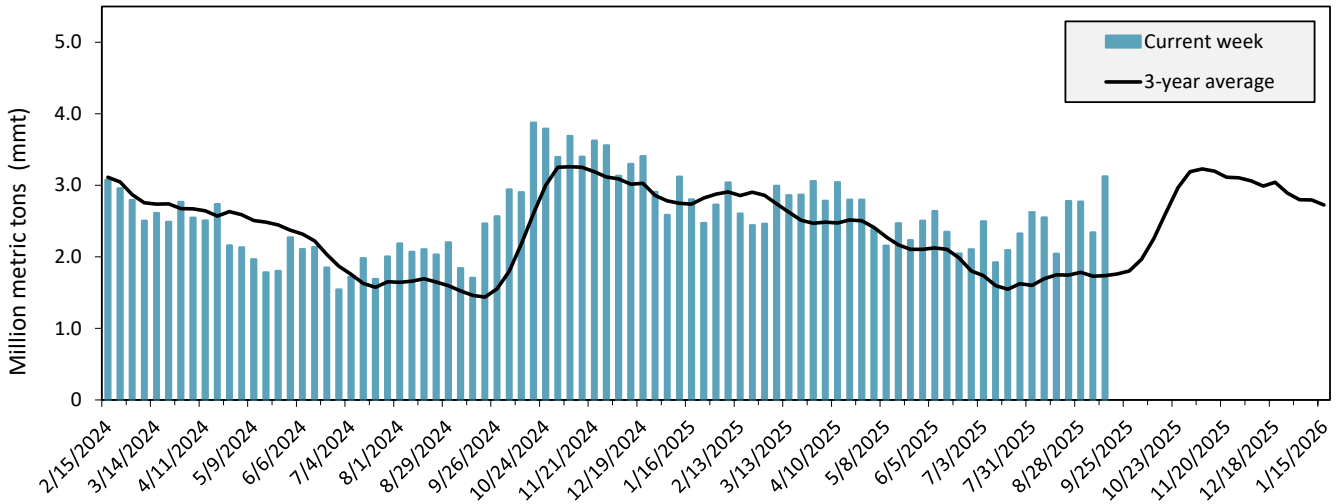
## Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

| Port regions | Commodity | For the week ending 09/11/2025 | 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 | 193 | 178 | 109 | 16,373 | 11,704 | 140 | 355 | 525 | 13,987 |
| | Soybeans | 0 | 0 | n/a | 1,966 | 2,669 | 74 | 0 | 0 | 10,445 |
| | Wheat | 432 | 202 | 214 | 8,151 | 8,252 | 99 | 116 | 128 | 11,453 |
| | All grain | 625 | 380 | 165 | 26,605 | 23,711 | 112 | 144 | 159 | 37,186 |
| Mississippi Gulf | Corn | 956 | 924 | 103 | 26,349 | 18,944 | 139 | 160 | 198 | 27,407 |
| | Soybeans | 684 | 350 | 196 | 13,984 | 13,804 | 101 | 151 | 137 | 29,741 |
| | Wheat | 53 | 94 | 56 | 3,010 | 3,629 | 83 | 127 | 129 | 4,523 |
| | All grain | 1,692 | 1,368 | 124 | 43,382 | 36,496 | 119 | 151 | 166 | 61,789 |
| Texas Gulf | Corn | 18 | 27 | 67 | 412 | 393 | 105 | 153 | 231 | 570 |
| | Soybeans | 0 | 0 | n/a | 106 | 0 | n/a | n/a | n/a | 741 |
| | Wheat | 173 | 66 | 262 | 3,403 | 1,339 | 254 | 267 | 300 | 1,940 |
| | All grain | 227 | 93 | 245 | 4,434 | 4,404 | 101 | 153 | 162 | 6,965 |
| Interior | Corn | 301 | 311 | 97 | 10,298 | 9,711 | 106 | 129 | 169 | 13,463 |
| | Soybeans | 118 | 116 | 102 | 4,829 | 4,983 | 97 | 108 | 141 | 8,059 |
| | Wheat | 97 | 57 | 172 | 2,310 | 2,261 | 102 | 99 | 106 | 2,989 |
| | All grain | 533 | 484 | 110 | 17,786 | 17,115 | 104 | 118 | 147 | 24,791 |
| Great Lakes | Corn | 42 | 0 | n/a | 106 | 0 | n/a | n/a | 776 | 271 |
| | Soybeans | 0 | 0 | n/a | 0 | 18 | 0 | n/a | n/a | 136 |
| | Wheat | 0 | 10 | 0 | 193 | 365 | 53 | 40 | 52 | 653 |
| | All grain | 42 | 10 | 405 | 300 | 383 | 78 | 97 | 103 | 1,060 |
| Atlantic | Corn | 2 | 3 | 59 | 248 | 223 | 111 | 59 | 55 | 410 |
| | Soybeans | 2 | 2 | 84 | 499 | 441 | 113 | 437 | 62 | 1,272 |
| | Wheat | 0 | 0 | n/a | 53 | 65 | 81 | 8 | 15 | 73 |
| | All grain | 4 | 6 | 74 | 800 | 730 | 110 | 37 | 40 | 1,754 |
| All Regions | Corn | 1,512 | 1,443 | 105 | 53,785 | 40,975 | 131 | 167 | 212 | 56,109 |
| | Soybeans | 804 | 468 | 172 | 21,488 | 21,970 | 98 | 126 | 122 | 50,865 |
| | Wheat | 755 | 429 | 176 | 17,120 | 15,911 | 108 | 127 | 139 | 21,631 |
| | All grain | 3,124 | 2,340 | 133 | 93,412 | 82,892 | 113 | 140 | 159 | 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.

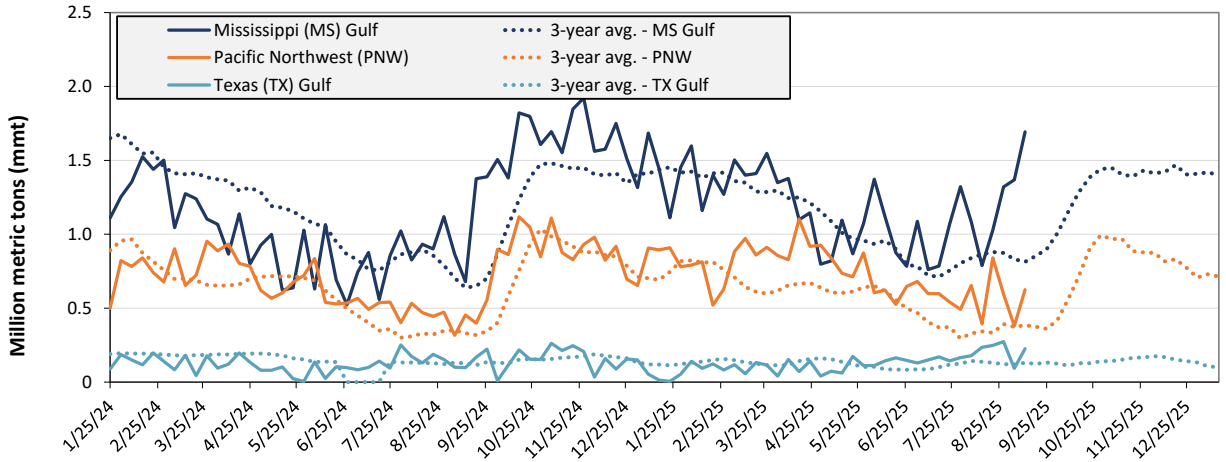
## Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)




For the week ending September 11: 3.1 mmt of grain inspected, up 33 percent from the previous week, up 69 percent from the same week last year, and up 80 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 09/11/25 inspections (mmt): |
|---|
| MS Gulf: 1.69 |
| PNW: 0.63 |
| TX Gulf: 0.23 |

| Percent change from: | MS Gulf | TX Gulf | U.S. Gulf | PNW |
|---|---|---|---|---|
| Last week | up 24 | up 145 | up 31 | up 65 |
| Last year (same 7 days) | up 149 | up 54 | up 132 | up 24 |
| 3-year average (4-week moving average) | up 108 | up 74 | up 103 | up 63 |

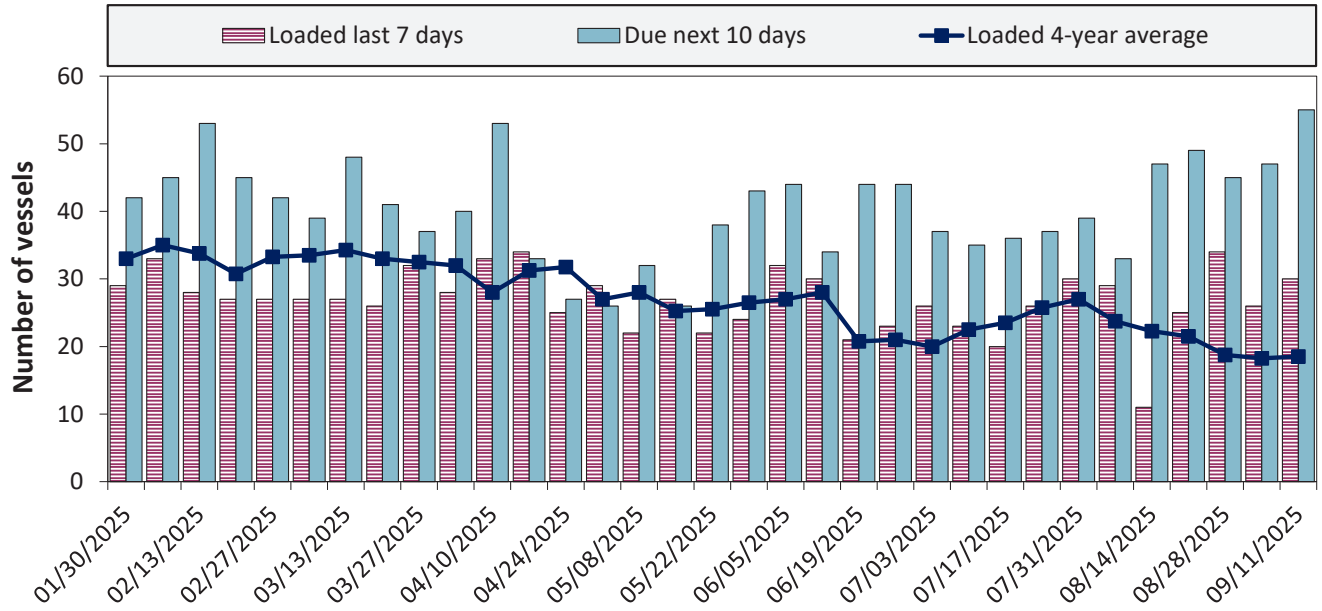
Source: USDA, Federal Grain Inspection Service.

## 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 |
| 9/11/2025 | 27 | 30 | 55 | 13 |
| 9/4/2025 | 24 | 26 | 47 | 10 |
| 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.

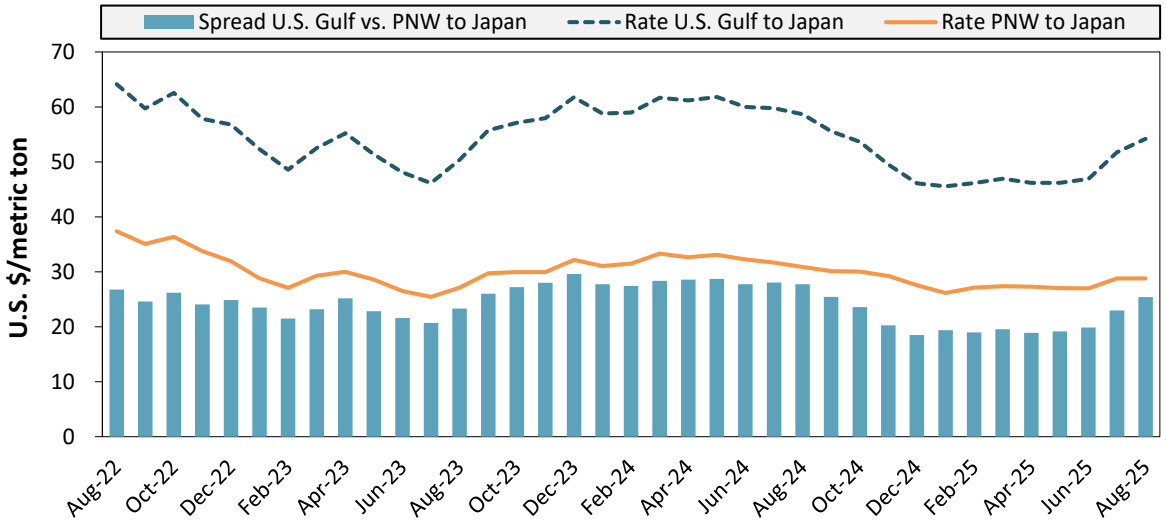
## Figure 19. U.S. Gulf vessel loading activity




| Week ending 09/11/25, number of vessels | Loaded | Due |
|---|---|---|
| Change from last year | 50% | -8% |
| Change from 4-year average | 62% | 34% |

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.

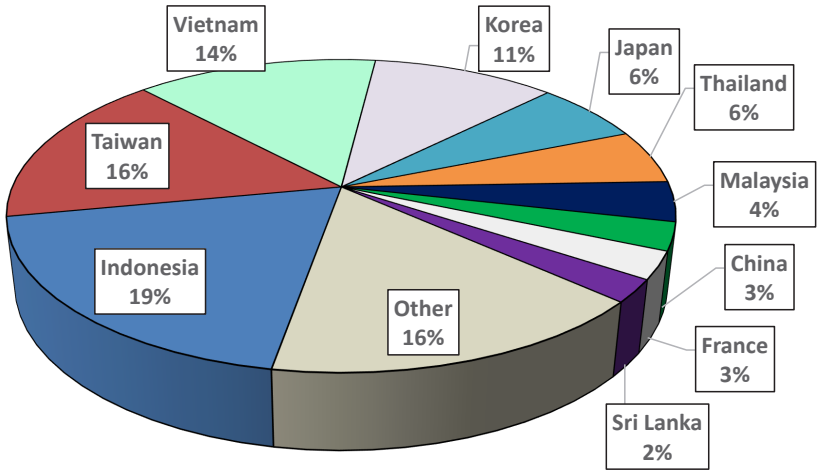
## Table 20. Ocean freight rates for selected shipments, week ending 9/13/2025

| 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.

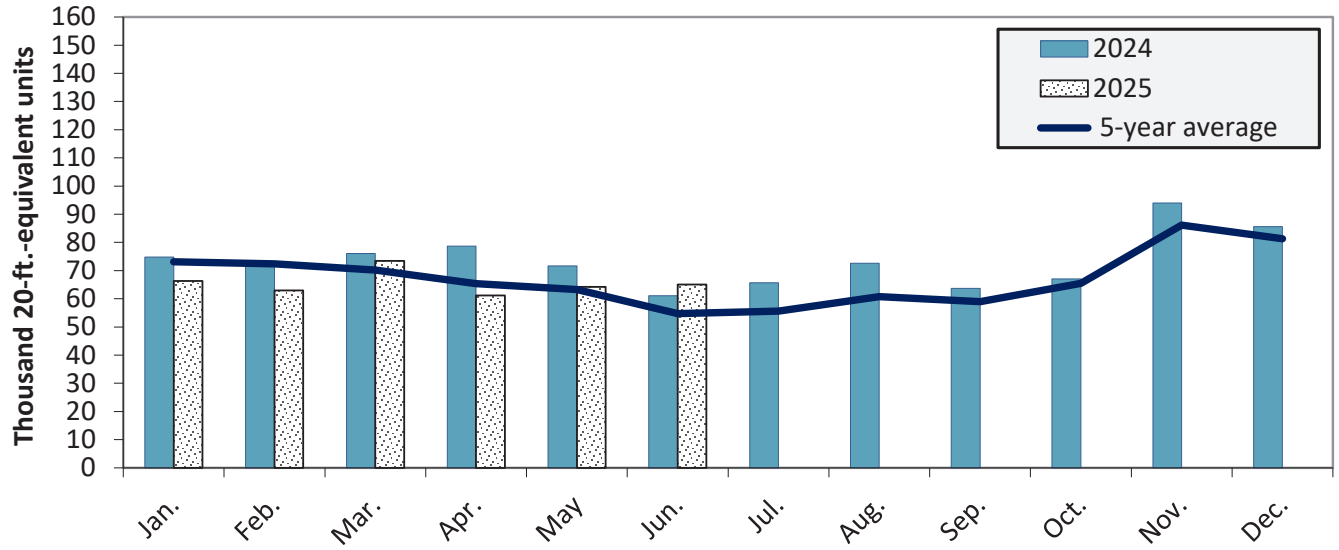
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined 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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**Preferred citation:** U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. September 18, 2025.
Web: **http://dx.doi.org/10.9752/TS056.09-18-2025**

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***.

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