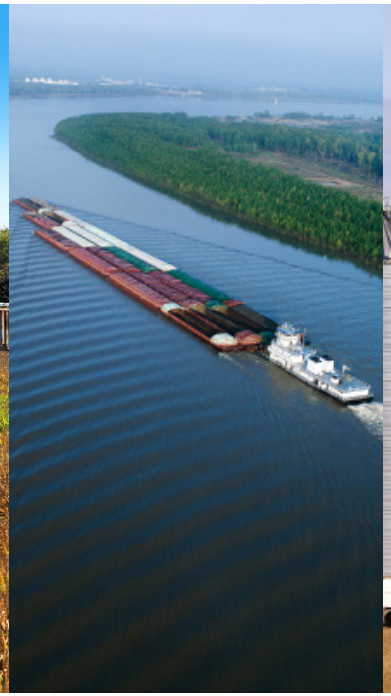
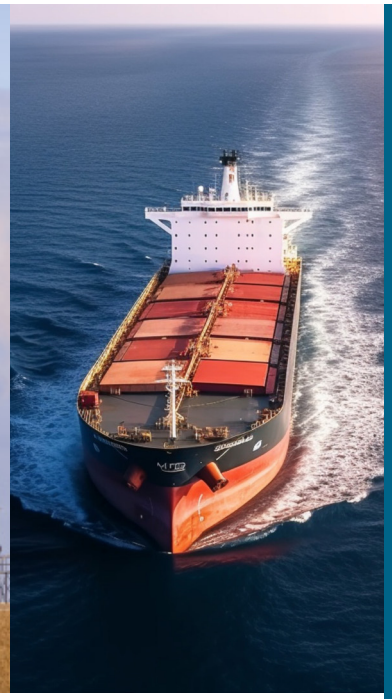
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE





Grain Transportation Report

Contents

Weekly Highlights 2
Snapshots by Sector 3
Feature Article 4
Grain Transportation Indicators 6
Rail Transportation 8
Barge Transportation 16
Truck Transportation 20
Grain Exports 21
Ocean Transportation 25
Contacts and Links 28

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Diesel Prices Fall for 7th Consecutive Week. According to the Energy Information Administration (EIA), for the week ending January 5, the U.S. average diesel fuel price was $3.477 per gallon—down 2.3 cents from the previous week, marking the 7th consecutive week of price declines. The price was also down 8.4 cents from the same week last year.

Since the week ending November 17, the U.S. average diesel price has fallen 39.1 cents. The downward trend started after the Organization of the Petroleum Exporting Countries' (OPEC)+ decided to pause increasing the oil supply in the first quarter of 2026, because of an oil surplus in global markets.

For the week ending January 5, diesel prices declined in all five EIA districts. Over the last 7 weeks, diesel prices fell the most in the Rocky Mountain region (down 59.1 cents per gallon) followed by the Midwest (down 52.6 cents per gallon).

New Shuttle-Loading Grain Elevator in Illinois To Open in 2026. A recent news report from WQAD-TV (in Moline, IL) highlighted a new shuttle-train-loading grain elevator that will open in Bureau County, IL, in 2026.

Built by Bartlett Grain Co. on a Union Pacific Railroad line, the new facility will load corn shuttle trains to facilitate Barlett's corn exports to Mexico. In 2013, Bartlett opened a grain elevator in Jacksonville, IL—on a Kansas City Southern Railway line—likewise, to source corn for export to Mexico.

The new elevator construction comes amid strong demand for corn exports to Mexico. From September to November 2025 (the first 3 months of marketing year 2025/26), inspections for corn exports to Mexico, by rail, totaled 3.9 million metric tons—55 percent above the prior 5-year average (Grain Transportation Report, January 1, 2026).

DOT Announces Funding Opportunity for BUILD Infrastructure Projects. On December 15, the U.S. Department of Transportation (DOT) announced $1.5 billion in grant funding available through the Better Utilizing Investments to Leverage Development (BUILD) discretionary grant program for fiscal year 2026.

BUILD grants fund surface transportation infrastructure projects with significant local or regional impact. Past projects have benefited grain transportation (GTR, August 21, 2025, second highlight).

Any nonfederal government or public transportation authority—State, local, tribal, territorial, or a partnership of those entities—is eligible to apply. For more information, see the notice of funding opportunity. Applications are due by 5 pm ET on February 24, 2026.

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 January 1, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2025/26 totaled 40.76 million metric tons (mmt down 3 percent from the week ending December 25 and up 8 percent from the same time last year.

Net **corn export sales** for MY 2025/26 were 0.38 mmt, down 49 percent from the week ending December 25. Net **soybean export sales** were 0.88 mmt, down 26 percent from the week ending December 25. Net **wheat export sales** were 0.12 mmt, up 24 percent from the week ending December 25.

Rail

U.S. Class I railroads originated 24,757 **grain carloads** during the week ending December 27. This was a 14-percent decrease from the previous week, 7 percent more than last year, and 16 percent more than the 3-year average.

Average January **shuttle secondary railcar bids/offers** (per car) were $526 above tariff for the week ending January 1. This was $336 less than last week and $520 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were $19 above tariff. This was $19 less than last week and $31 lower than this week last year.

Barge

For the week ending January 3, **barged grain movements** totaled 757,876 tons. This was 87 percent more than the previous week and up 8 percent from the same period last year.

For the week ending January 3, 479 grain barges **moved down river**—209 more than last week. There were 840 grain barges **unloaded** in the New Orleans region, 64 percent more than last week.

Ocean

For the week ending January 1, 23 **oceangoing grain vessels** were loaded in the Gulf—12 percent fewer than the same period last year. Within the next 10 days (starting January 2), 49 vessels were expected to be loaded—4 percent fewer than from the same period last year.

As of January 1, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $50.00, down 8 percent from the last available rate on December 18, 2025. The rate from the Pacific Northwest to Japan was $26.50 per mt, down 5 percent from the last available rate on December 18, 2025.

Third-Quarter 2025 Corn and Soybean Total Landed Costs

From second to third quarter 2025 (quarter to quarter), transportation costs for shipping corn and soybeans from Minneapolis, MN, to Japan increased through both the U.S. Gulf (Gulf route) and the Pacific Northwest (PNW route). From third quarter 2024 to third quarter 2025 (year to year), transportation costs for shipping corn and soybeans decreased through both the Gulf route and the PNW route.

Quarter to quarter, rising ocean freight rates for corn and soybeans—up for both routes—were driven by robust global bulk demand, seasonal shipping behavior, and temporary logistical constraints (**Grain Transportation Report (GTR), November 27, 2025**). Year to year, ocean freight rates fell for both corn and soybeans and both routes.

Both quarter to quarter and year to year, total landed costs (farm values plus transportation costs) varied by commodity via the Gulf route and fell for both commodities through the PNW route.

U.S. Gulf Costs

Transportation costs. Quarter to quarter, Gulf-route transportation costs rose 14 percent each for corn and soybeans—mainly because of an 18-percent jump in barge freight rates and a 17-percent increase in ocean freight rates. Trucking rates decreased 4 percent (for moving corn and soybeans from Minnesota farms to local grain elevators).

Year to year, U.S. Gulf transportation costs fell less than 1 percent each for corn and soybeans, in response to lower truck and ocean freight rates (table 1).

Total landed costs. Quarter to quarter, farm values fell 12 percent for corn and fell 3 percent for soybeans. Year to year, farm values rose less than 1 percent for corn and fell 6 percent for soybeans.

Quarter to quarter, U.S. Gulf total landed costs fell 3 percent for corn (because of a decrease in farm values) and increased 1 percent for soybeans. Year to year, total landed costs fell less than 1 percent for corn and fell 4 percent for soybeans. As a share of landed costs, transportation costs were 43 percent for corn and 24 percent for soybeans (table 1).

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	
	3rd qtr. '24	2nd qtr. '25	3rd qtr. '25	Yr. to yr.	Qtr .to qtr.	3rd qtr. '24	2nd qtr. '25	3rd qtr. '25	Yr. to yr.	Qtr .to qtr.
Truck	17.67	18.07	17.35	-1.81	-3.98	17.67	18.07	17.35	-1.81	-3.98
Barge	39.70	36.64	43.17	8.74	17.82	39.70	36.64	43.17	8.74	17.82
Ocean	57.99	46.42	54.36	-6.26	17.10	57.99	46.42	54.36	-6.26	17.10
Total transportation cost	115.36	101.13	114.88	-0.42	13.60	115.36	101.13	114.88	-0.42	13.60
Farm value	153.80	174.66	153.93	0.08	-11.87	377.85	366.33	356.78	-5.58	-2.61
Total landed cost	269.16	275.79	268.81	-0.13	-2.53	493.21	467.46	471.66	-4.37	0.90
Transportation % landed cost	42.86	36.67	42.74	-0.29	16.55	23.39	21.63	24.36	4.13	12.58

Note: Barge rates are from Minneapolis, MN, to the U.S. Gulf. USDA, National Agricultural Statistics Service is the source for corn and soybean prices. qtr. = quarter; yr. = year.
Source: USDA, Agricultural Marketing Service.

Inspections. At 9.5 million metric tons (mmt), third-quarter 2025 corn inspections through the Gulf rose 23 percent year to year and accounted for 51 percent of total third-quarter 2025 corn inspections. At 4.9 mmt, Gulf-route soybean shipments rose 23 percent year to year and accounted for 72 percent of total third-quarter 2025 soybean inspections (USDA, Federal Grain Inspection Services).

Pacific Northwest Costs

Transportation costs. With higher ocean freight rates, total transportation costs via the PNW route rose 1 percent each for corn and soybeans quarter to quarter. Ocean freight rates rose 7 percent each for corn and soybeans.

Year to year, PNW transportation costs fell 4 percent each for corn and soybeans, because of decreases in truck, rail, and ocean freight rates (table 2). Truck rates fell 2 percent each for corn and soybeans. Rail rates fell 4 percent for corn and fell 3 percent for soybeans. Ocean rates fell 6 percent each for corn and soybeans.

Total landed costs. Quarter to quarter, farm values fell 12 percent for corn and fell 3 percent for soybeans. Year to year, farm values increased less than 1 percent for corn and declined 6 percent for soybeans.

Quarter to quarter, PNW-route total landed costs fell 7 percent for corn and fell 2 percent for soybeans—in both cases, because of lower farm values. Year to year, total landed costs fell 2 percent for corn and fell 5 percent for soybeans. As a share of landed costs, transportation costs were 40 percent for corn and 24 percent for soybeans (table 2).

Inspections. Third-quarter 2025 PNW corn inspections were 4.2 mmt—up 102 percent from the previous year—and accounted for 23 percent of total third-quarter 2025 corn inspections. The jump in corn inspections from last year owed to a sharp increase in corn inspections destined for Japan, South Korea, and Taiwan. Soybean inspections were 48 metric tons, compared to 0.4 mmt the previous year. PNW soybean inspections were less than 1 percent of total third-quarter 2025 soybean inspections (USDA, Federal Grain Inspection Services).

WASDE Projections

According to USDA's December 2025 *World Agricultural Supply and Demand Estimates (WASDE)* report, total U.S. corn exports for marketing year (MY) 2025/26 are expected to increase 12 percent from MY 2024/25. In MY 2025/26, soybean exports are expected to decrease 13 percent from MY 2024/25.

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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	
	3rd qtr. '24	2nd qtr. '25	3rd qtr. '25	Yr. to yr.	Qtr. to qtr.	3rd qtr. '24	2nd qtr. '25	3rd qtr. '25	Yr. to yr.	Qtr. to qtr.
Truck	17.67	18.07	17.35	-1.81	-3.98	17.67	18.07	17.35	-1.81	-3.98
Rail	57.73	55.47	55.19	-4.40	-0.50	65.23	63.46	63.18	-3.14	-0.44
Ocean	30.90	27.12	29.08	-5.89	7.23	30.90	27.12	29.08	-5.89	7.23
Total transportation cost	106.30	100.66	101.62	-4.40	0.95	113.80	108.65	109.61	-3.68	0.88
Farm value	153.80	174.66	153.93	0.08	-11.87	377.85	366.33	356.78	-5.58	-2.61
Total landed cost	260.1	275.32	255.55	-1.75	-7.18	491.65	474.98	466.39	-5.14	-1.81
Transportation % landed cost	40.87	36.56	39.77	-2.70	8.76	23.15	22.87	23.50	1.53	2.74

Note: 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. qtr. = quarter; yr. = year.
Source: USDA, Agricultural Marketing Service.

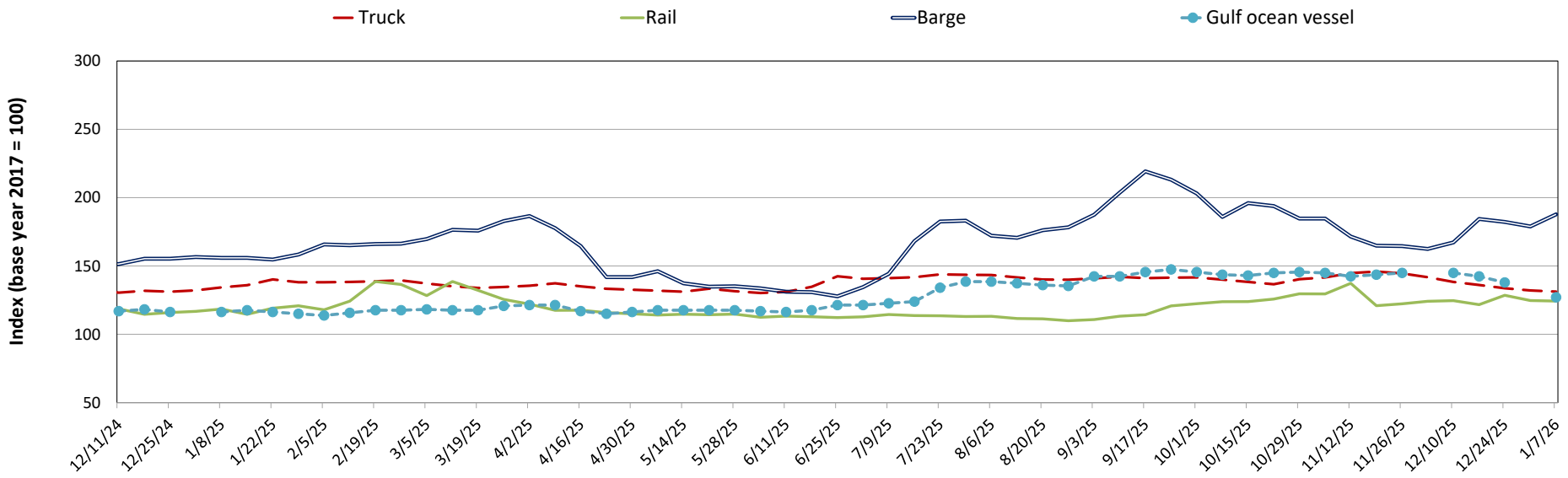
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
01/07/26	131	124	188	127	126
12/31/25	132	125	179	n/a	n/a
01/08/25	134	119	156	116	126

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.

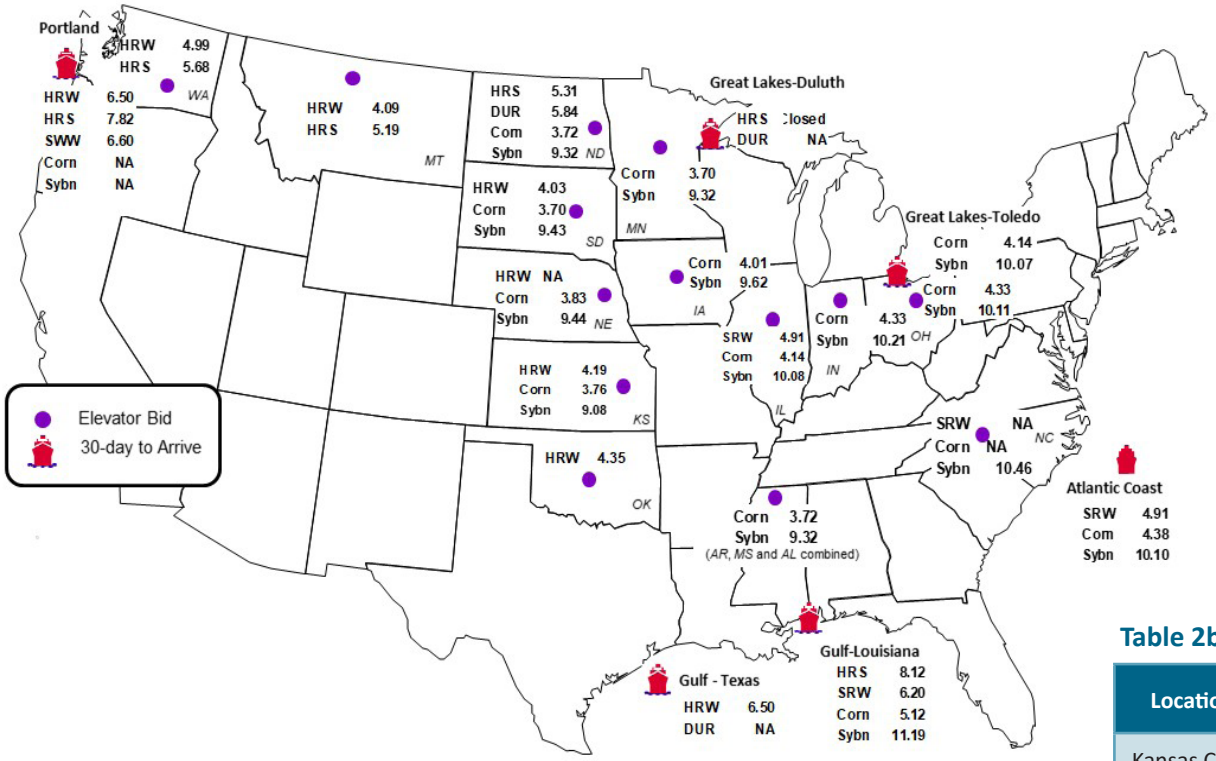
Figure 1. Grain transportation cost indicators as of week ending 1/7/26



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	1/2/2026	12/26/2025
Corn	IL–Gulf	-0.98	-0.97
Corn	NE–Gulf	-1.29	-1.29
Soybean	IA–Gulf	-1.57	-1.41
HRW	KS–Gulf	-2.31	-2.12
HRS	ND–Portland	-2.51	-2.46

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	1/2/2026	Week ago 12/26/2025	Year ago 1/3/2025
Kansas City	Wheat	Mar	5.150	5.334	5.486
Minneapolis	Wheat	Mar	5.708	5.793	5.776
Chicago	Wheat	Mar	5.066	5.188	5.390
Chicago	Corn	Mar	4.374	4.498	4.572
Chicago	Soybean	Mar	10.456	10.724	10.064

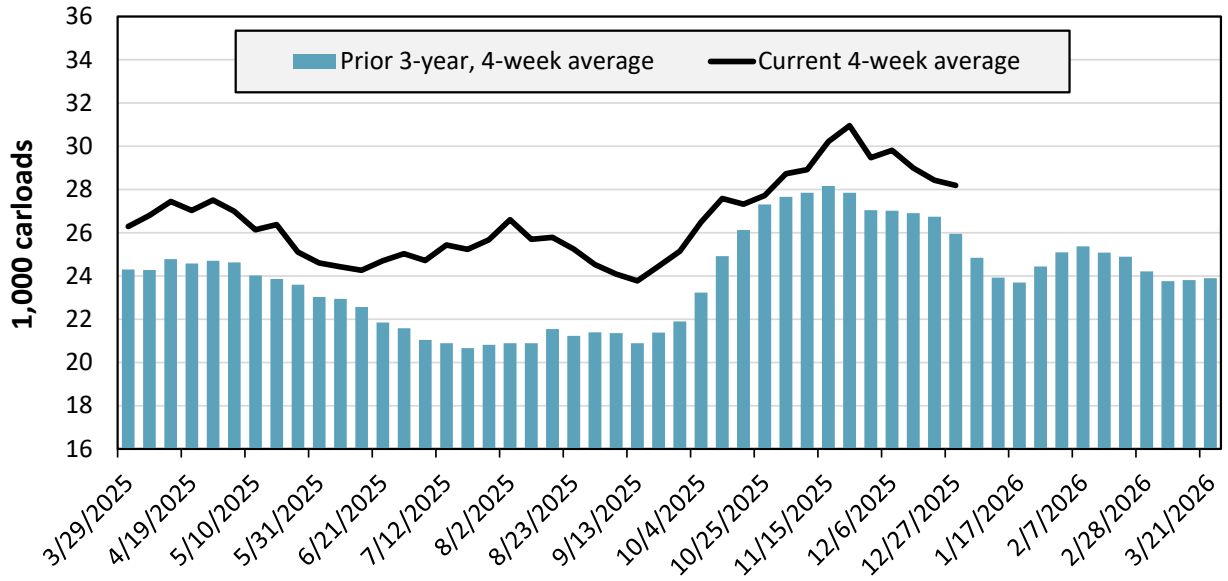
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 12/27/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,094	1,812	11,678	5,995	2,776	1,402	24,757
This week last year	1,232	2,938	9,373	5,935	2,530	1,060	23,068
2025 YTD	80,370	137,864	597,277	308,226	154,039	77,698	1,355,474
2024 YTD	87,911	143,353	557,544	279,532	142,383	58,512	1,269,235
2025 YTD as % of 2024 YTD	91	96	107	110	108	133	107
Last 4 weeks as % of 2024	85	81	115	100	113	123	106
Last 4 weeks as % of 3-yr. avg.	80	88	114	112	116	121	109
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 December 27, grain carloads were down 1 percent from the previous week, up 6 percent from last year, and up 9 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: 12/26/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	26.0	26.2	39.6	15.9	12.6	31.4	25.3
	Average over last 4 weeks	23.5	24.3	29.0	14.5	10.1	32.6	22.3
	Average of same 4 weeks last year	25.6	30.4	25.3	15.5	10.8	n/a	21.5
Average grain unit train speeds (miles per hour)	This week	25.0	21.4	26.4	24.4	21.9	20.1	23.2
	Average over last 4 weeks	23.8	19.8	25.2	23.6	23.7	19.2	22.5
	Average of same 4 weeks last year	23.2	20.1	25.7	22.8	25.5	n/a	23.5

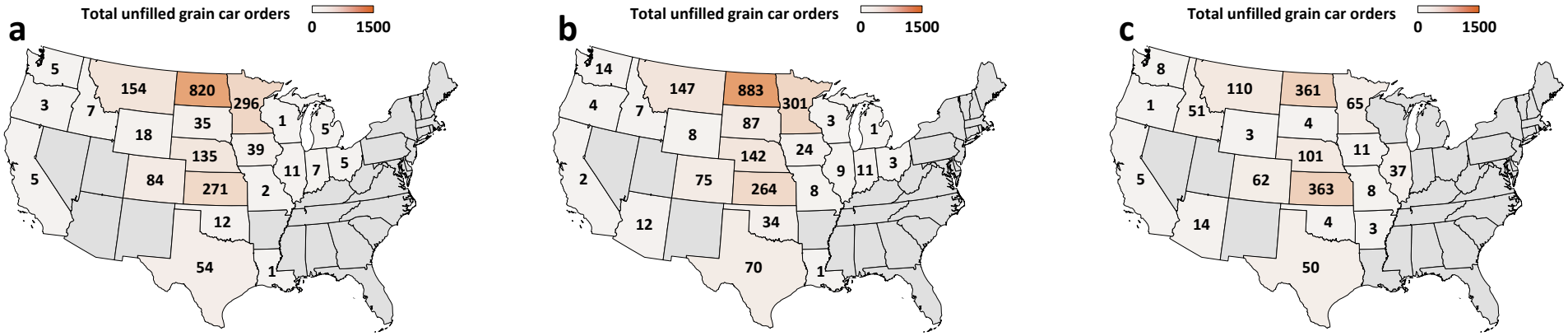
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a = not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 12/26/2025		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	64	15	386	77	27	242	811
	Average over last 4 weeks	36	11	330	59	11	261	708
	Average of same 4 weeks last year	61	7	478	101	6	n/a	652
Average number of loaded grain cars not moved in over 48 hours	This week	104	312	1,022	83	29	651	2,201
	Average over last 4 weeks	38	206	758	66	20	659	1,746
	Average of same 4 weeks last year	77	234	692	98	2	n/a	1,103
Average number of grain unit trains held	This week	0	0	8	4	1	5	18
	Average over last 4 weeks	0	0	5	4	1	4	13
	Average of same 4 weeks last year	0	0	18	5	0	n/a	24
Total unfilled manifest grain car orders	This week	18	0	1,169	285	0	498	1,970
	Average over last 4 weeks	17	0	1,284	318	0	533	2,152
	Average of same 4 weeks last year	2	1	357	640	0	n/a	1,000

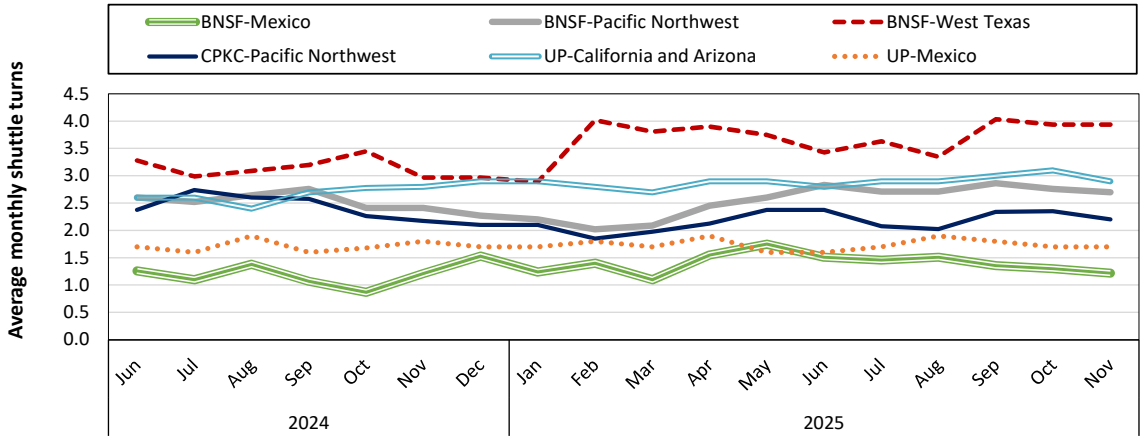
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; n/a = not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 12/26/2025 (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

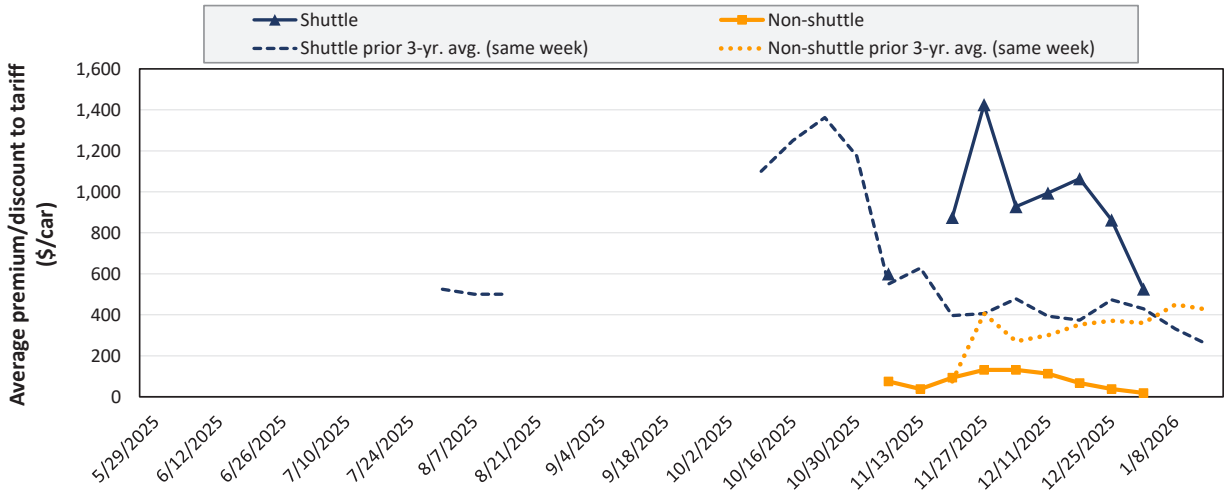


In November 2025, BNSF Railway's average monthly grain shuttle turns were 1.2 to Mexico, 2.7 to the Pacific Northwest, and 3.9 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 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 January 2026



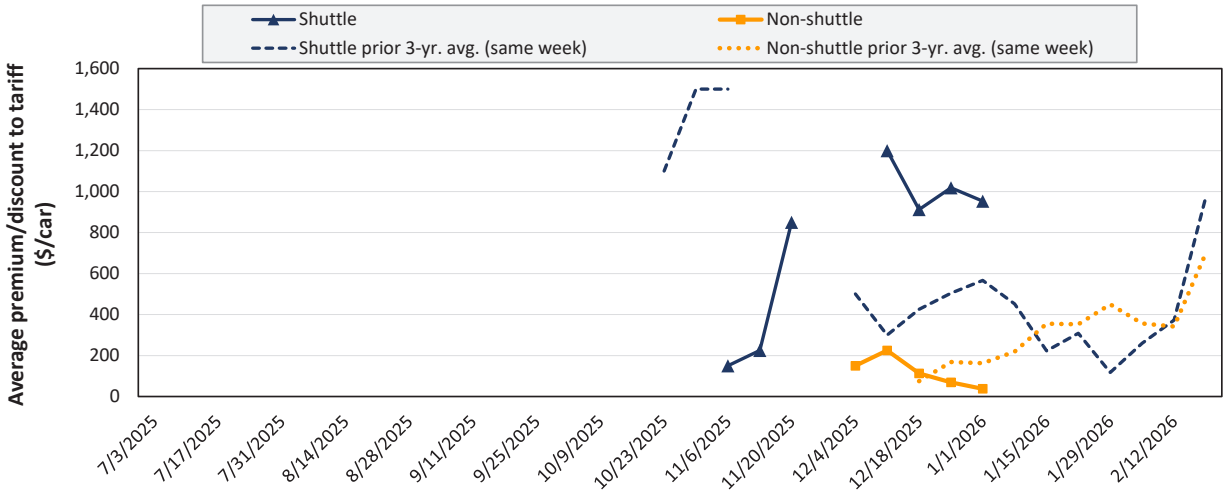
Average non-shuttle bids/offers fell $19 this week, and are $113 below the peak.

Average shuttle bids/offers fell $336 this week and are $899 below the peak.

1/1/2026	BNSF	UP
Non-Shuttle	$13	$25
Shuttle	$583	$469

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 February 2026



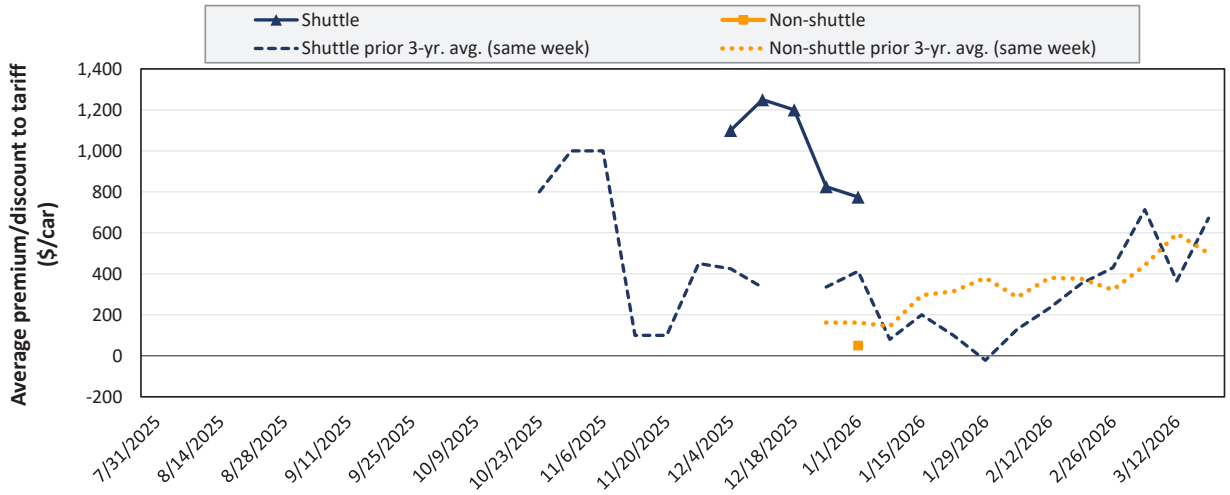
Average non-shuttle bids/offers fell $31 this week, and are $188 below the peak.

Average shuttle bids/offers fell $66 this week and are $247 below the peak.

1/1/2026	BNSF	UP
Non-Shuttle	$25	$50
Shuttle	$1,250	$656

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 March 2026



There were no non-shuttle bids/offers last week. Average non-shuttle bids/offers this week are at the peak.

Average shuttle bids/offers fell $50 this week and are $475 below the peak.

1/1/2026	BNSF	UP
Non-Shuttle	$50	n/a
Shuttle	$1,100	$450

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: 1/1/2026		Delivery period					
		Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26
Non-shuttle	BNSF	13	25	50	n/a	n/a	n/a
	Change from last week	13	0	n/a	n/a	n/a	n/a
	Change from same week 2025	-13	-175	n/a	n/a	n/a	n/a
	UP	25	50	n/a	n/a	n/a	n/a
	Change from last week	-50	-63	n/a	n/a	n/a	n/a
	Change from same week 2025	-50	-75	n/a	n/a	n/a	n/a
Shuttle	BNSF	583	1,250	1,100	550	n/a	n/a
	Change from last week	-492	-150	-50	0	n/a	n/a
	Change from same week 2025	283	775	825	n/a	n/a	n/a
	UP	469	656	450	n/a	n/a	n/a
	Change from last week	-181	18	-50	n/a	n/a	n/a
	Change from same week 2025	756	n/a	n/a	n/a	n/a	n/a
	CPKC	275	400	n/a	n/a	n/a	n/a
	Change from last week	225	n/a	n/a	n/a	n/a	n/a
	Change from same week 2025	175	350	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, January 2026

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	$142.44	$5,974.44	$1.61	$59.33	4.5
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,291	$73.32	$4,364.32	$1.18	$43.34	5.6
	CPKC	Westby, MT	St. Louis, MO	Unit	$5,788	$464.49	$6,252.49	$1.69	$62.09	4.1
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,804	$85.32	$4,889.32	$1.32	$48.55	5.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,215	$180.12	$6,395.12	$1.73	$63.51	4.5
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,865	$35.28	$2,900.28	$0.78	$28.80	8.0
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,732	$183.48	$5,915.48	$1.60	$58.74	6.8
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,838	$152.04	$5,990.04	$1.62	$59.48	4.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,412	$124.56	$5,536.56	$1.50	$54.98	4.8
	CPKC	Minot, ND	Kalama, WA	Unit	$5,298	$411.26	$5,709.26	$1.54	$56.70	-2.7
	CPKC	Nekoma, ND	Chicago, IL	Manifest	$5,030	$247.16	$5,277.16	$1.43	$52.40	4.5
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$76.56	$3,476.56	$0.94	$34.52	-10.7
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$67.56	$3,667.56	$0.99	$36.42	-13.4
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$228.00	$6,028.00	$1.63	$59.86	-11.7
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$165.12	$5,865.12	$1.59	$58.24	0.7
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$103.08	$4,303.08	$1.16	$42.73	-11.1
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$90.84	$4,090.84	$1.11	$40.62	-12.2
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$103.68	$3,603.68	$0.97	$35.79	-13.2
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$75.96	$3,775.96	$1.02	$37.50	-11.4
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$76.56	$3,976.56	$1.07	$39.49	-10.8
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$407.05	$4,932.05	$1.33	$48.98	-6.3
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$152.25	$5,119.25	$1.38	$50.84	2.3
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$200.90	$3,975.90	$1.07	$39.48	-8.4
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$267.75	$4,292.75	$1.16	$42.63	-7.6
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,791	$92.64	$4,883.64	$1.32	$48.50	5.1
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,439	$90.96	$4,529.96	$1.22	$44.98	5.5
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$39.96	$2,071.96	$0.56	$20.58	0.8
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	$8,611	$0.00	$8,611.00	$2.33	$85.51	3.2
	CSX	Chicago, IL	Albany, NY	Unit	$7,676	$0.00	$7,676.00	$2.07	$76.23	3.5
	CSX	Chicago, IL	Buffalo, NY	Manifest	$6,102	$0.00	$6,102.00	$1.65	$60.60	3.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	$8,832	$0.00	$8,832.00	$2.39	$87.71	3.1

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, January 2026

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	$5,600	$127.92	$5,727.92	$1.44	$56.88	-2.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$202.08	$5,672.08	$1.43	$56.33	1.5
	BNSF	Edison, NE	Hanford, CA	Railroad	$5,460	$213.12	$5,673.12	$1.43	$56.34	-7.4
	BNSF	Edison, NE	Hereford, TX	Railroad	$4,500	$87.36	$4,587.36	$1.16	$45.55	-9.9
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$211.08	$5,561.08	$1.40	$55.22	1.6
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,620	$112.20	$4,732.20	$1.19	$46.99	2.3
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,260	$91.68	$4,351.68	$1.10	$43.21	-10.3
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,000	$112.44	$4,112.44	$1.04	$40.84	-10.7
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$170.28	$5,600.28	$1.41	$55.61	1.3
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$199.92	$5,629.92	$1.42	$55.91	1.5
	CN	Gibson City, IL	Reserve, LA	Private	$2,301	$344.52	$2,645.52	$0.67	$26.27	7.2
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,681	$344.52	$3,025.52	$0.76	$30.04	6.2
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,342	$51.60	$1,393.60	$0.35	$13.84	0.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,047	$472.97	$5,519.97	$1.39	$54.82	0.9
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$455.13	$5,968.13	$1.51	$59.27	0.8
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$6,241	$0.00	$6,241.00	$1.57	$61.98	4.7
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,378	$0.00	$6,378.00	$1.61	$63.34	3.9
	CSX	Olney, IL	Fairmount, GA	Railroad	$4,891	$0.00	$4,891.00	$1.23	$48.57	3.9
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$3,935	$241.85	$4,176.85	$1.05	$41.48	-2.5
	UP	Frankfort, KS	Calipatria, CA	Railroad	$5,855	$550.20	$6,405.20	$1.62	$63.61	-0.9
	UP	Mead, NE	Keyes, CA	Railroad	$6,015	$607.95	$6,622.95	$1.67	$65.77	-0.7
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$4,855	$249.90	$5,104.90	$1.29	$50.69	-2.1
	UP	Sloan, IA	Burley, ID	Railroad	$5,535	$411.60	$5,946.60	$1.50	$59.05	-1.3
	UP	Sterling, IL	Nashville, AR	Railroad	$4,075	$253.05	$4,328.05	$1.09	$42.98	-2.4
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$183.36	$6,318.36	$1.71	$62.74	1.2
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$5,185	$196.08	$5,381.08	$1.45	$53.44	-20.9
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$176.28	$6,261.28	$1.69	$62.18	1.2
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$102.60	$3,502.60	$0.95	$34.78	-22.9
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$194.88	$6,379.88	$1.72	$63.36	1.3
	CN	Gibson City, IL	Reserve, LA	Private	$2,301	$344.52	$2,645.52	$0.72	$26.27	7.2
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,681	$344.52	$3,025.52	$0.82	$30.04	6.2
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,785	$472.97	$6,257.97	$1.69	$62.14	0.8
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$361.50	$3,887.50	$1.05	$38.60	1.0
	CSX	Casey, IL	Mobile, AL	Private	$3,646	$0.00	$3,646.00	$0.99	$36.21	0.0
	CSX	Marion, OH	Chesapeake, VA	Private	$3,214	$0.00	$3,214.00	$0.87	$31.92	0.0
	UP	Canton, KS	Houston, TX	Railroad	$3,650	$261.45	$3,911.45	$1.06	$38.84	-27.1
	UP	Cozad, NE	Kalama, WA	Railroad	$5,140	$546.70	$5,686.70	$1.54	$56.47	-13.7
	UP	Cozad, NE	Houston, TX	Railroad	$4,010	$377.30	$4,387.30	$1.19	$43.57	-24.7
	UP	Sloan, IA	Ama, LA	Railroad	$4,090	$430.85	$4,520.85	$1.22	$44.89	-24.0

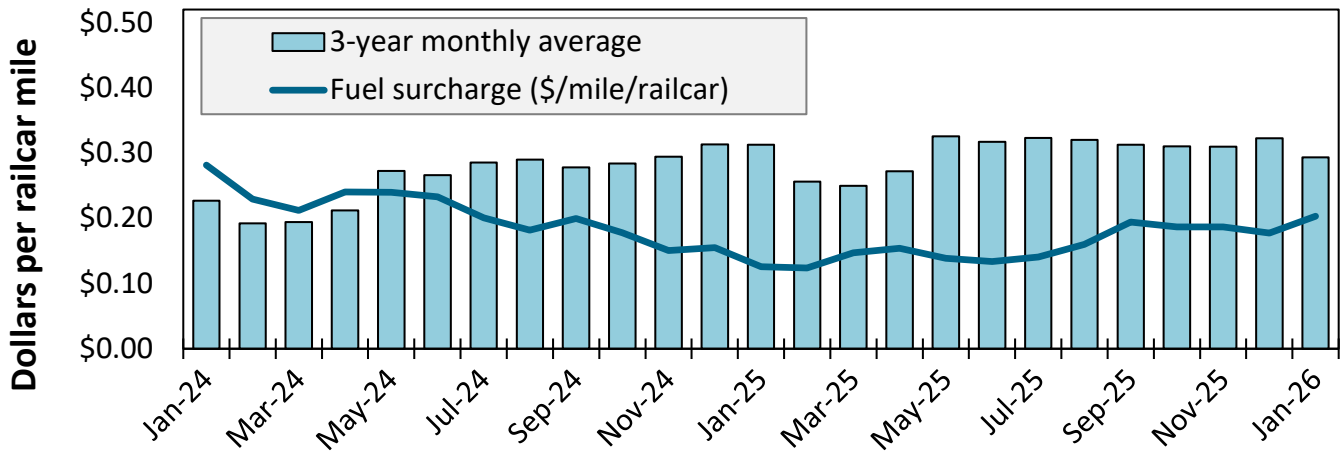
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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, January 2026

Commodity	US origin	US border city	US railroad	Train type	US Tariff Rate per car (USD)	US Fuel Surcharge per car (USD)	US Rate Plus Fuel Surcharge per car (USD)	US Tariff Rate + Fuel Surcharge per bushel (USD)	US Tariff Rate + Fuel Surcharge per metric ton (USD)	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	$4,641	$154	$4,795	$1.20	$47.19	3.1%
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,080	$553	$5,633	$1.41	$55.44	1.9%
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$5,550	$611	$6,161	$1.54	$60.64	1.9%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,005	$528	$5,533	$1.38	$54.46	1.8%
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,190	$560	$5,750	$1.44	$56.59	1.8%
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$4,535	$447	$4,982	$1.25	$49.03	-1.4%
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$4,655	$464	$5,119	$1.28	$50.38	-1.4%
	Superior, NE	El Paso, TX	BNSF	Shuttle	$4,622	$121	$4,743	$1.19	$46.68	-6.5%
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,080	$553	$5,633	$1.51	$55.44	1.9%
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$4,325	$131	$4,456	$1.19	$43.86	-17.5%
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$4,950	$425	$5,375	$1.44	$52.90	-18.6%
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$4,325	$130	$4,455	$1.19	$43.85	-17.5%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,005	$528	$5,533	$1.48	$54.46	1.8%
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$5,035	$446	$5,481	$1.47	$53.94	-18.2%
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,000	$94	$3,094	$0.83	$30.45	-24.4%
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,800	$94	$2,894	$0.78	$28.48	-20.8%
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,099	$319	$4,418	$1.18	$43.48	-7.7%
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,005	$528	$5,533	$1.48	$54.46	1.8%
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,024	$281	$4,305	$1.15	$42.37	-6.0%

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).

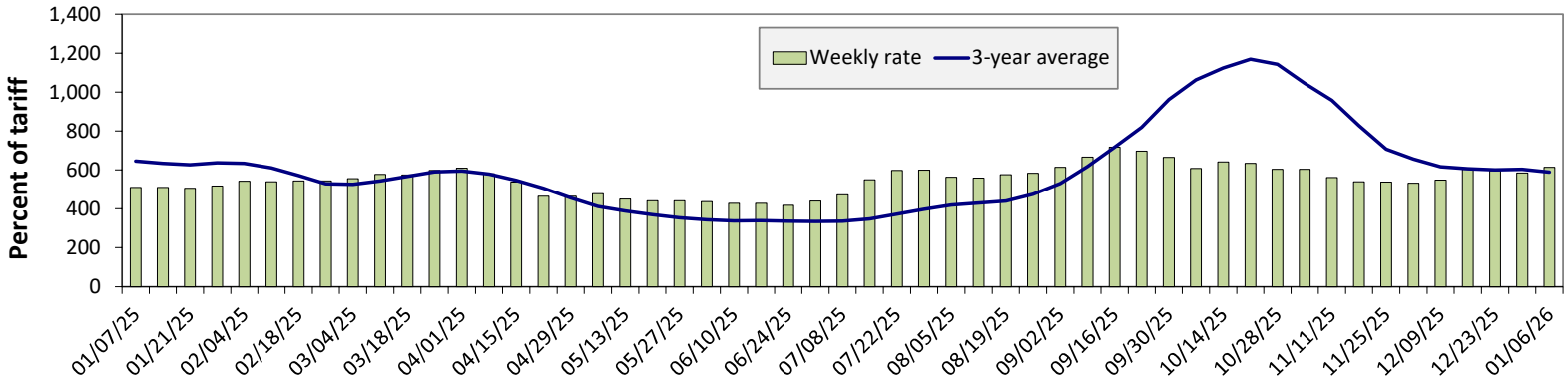
Figure 9. Railroad fuel surcharges, North American weighted average



January 2026: $0.20/mile, up 2 cents from last month's surcharge of $0.18/mile; up 7 cents from the January 2025 surcharge of $0.13/mile; and down 9 cents from the January prior 3-year average of $0.29/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 January 6: 5 percent higher than the previous week; 20 percent higher than last year; and 4 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

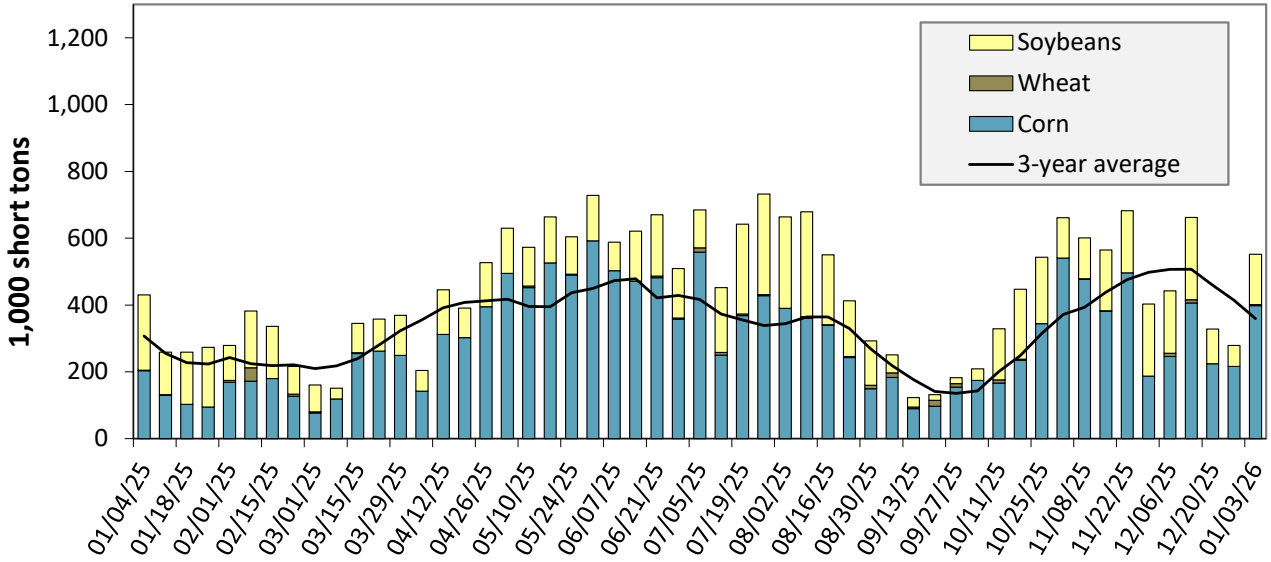
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	1/6/2026	n/a	613	614	510	514	410
	12/30/2025	n/a	n/a	585	500	497	406
$/ton	1/6/2026	n/a	32.61	28.49	20.35	24.11	12.87
	12/30/2025	n/a	n/a	27.14	19.95	23.31	12.75
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	n/a	n/a	20	34	31	40
	3-year avg.	n/a	n/a	4	6	4	8
Rate	February	n/a	575	555	459	463	371
	April	554	518	479	398	393	340

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 January 3: 28 percent higher than last year and 54 percent higher than the 3-year average.

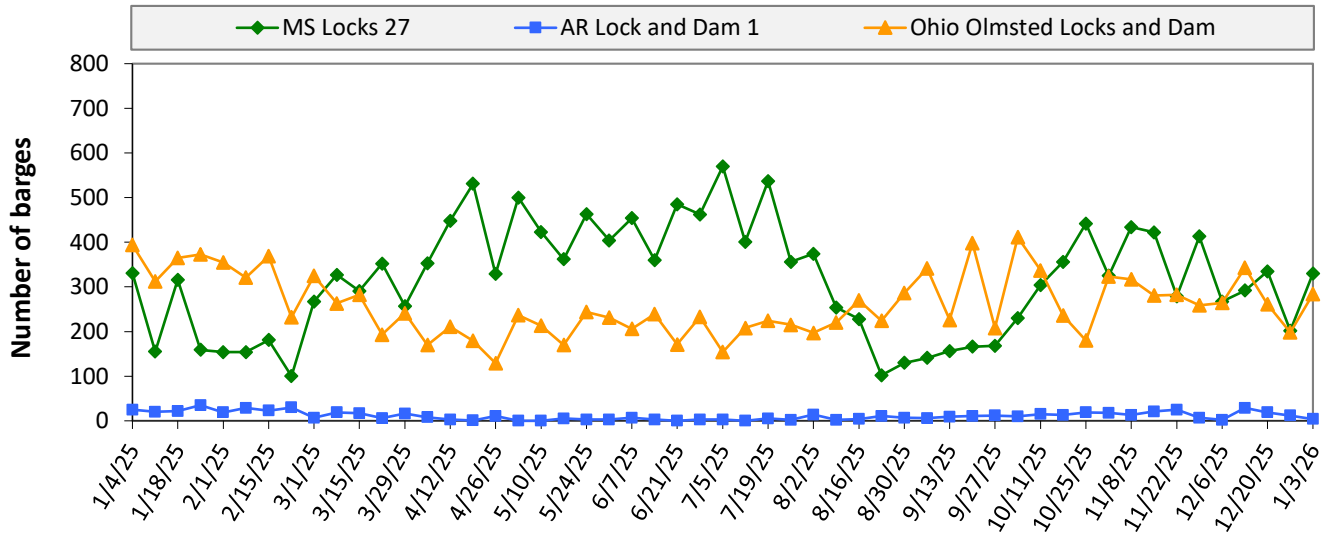
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 01/03/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	0	0	0	0	0
Mississippi River (Winfield, MO (L25))	79	3	6	0	88
Mississippi River (Alton, IL (L26))	382	3	127	0	512
Mississippi River (Granite City, IL (L27))	398	3	151	0	553
Illinois River (La Grange)	276	0	112	0	387
Ohio River (Olmsted)	65	5	126	0	197
Arkansas River (L1)	0	3	6	0	8
Weekly total - 2026	463	11	283	0	758
Weekly total - 2025	322	6	374	0	703
2026 YTD	463	11	283	0	758
2025 YTD	322	6	374	0	703
2026 as % of 2025 YTD	144	179	76	-	108
Last 4 weeks as % of 2025	88	71	65	16	76
Total 2025	19,552	1,247	11,039	166	32,003

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.

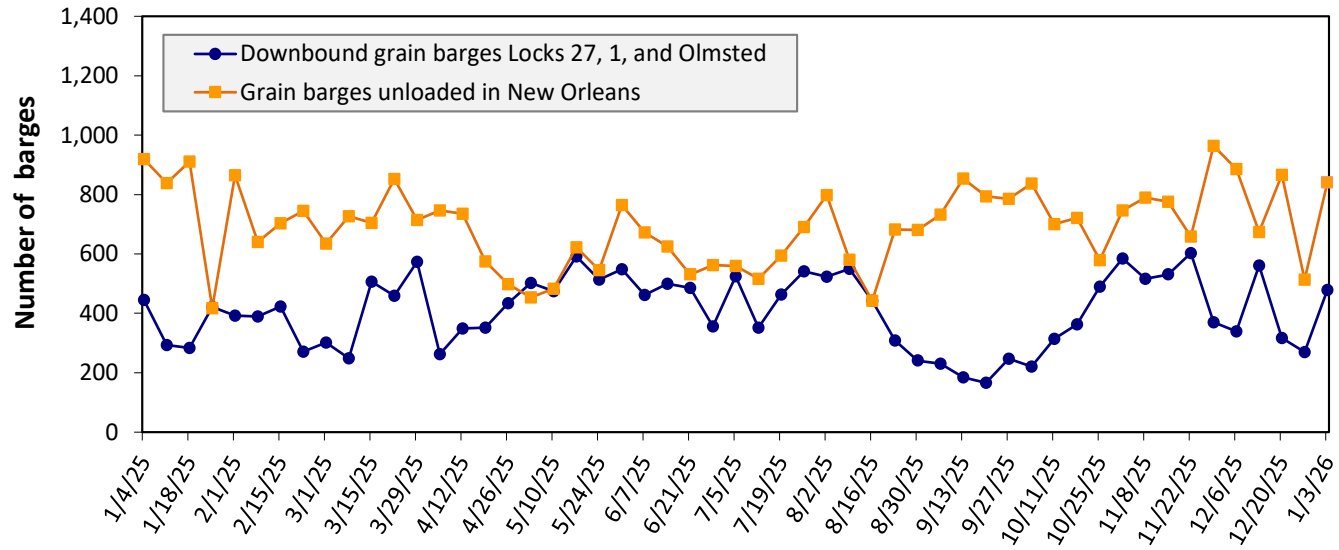
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending January 3: 618 barges transited the locks, 206 barges more than the previous week, and 10 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 January 3: 479 barges moved down river, 209 more than the previous week; 840 grain barges unloaded in the New Orleans Region, 64 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	
		January 2026	December 2025	January 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$22.61	$22.79	$21.50	5.1	4.6
	Central Ferry, WA/Almota, WA	$21.68	$21.86	$20.60	5.2	4.5
	Lyons Ferry, WA	$20.63	$20.81	$19.59	5.3	4.3
	Windust, WA/Lower Monumental, WA	$19.56	$19.74	$18.56	5.4	4.1
	Sheffler, WA	$19.53	$19.71	$18.53	5.4	4.1
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$18.29	$18.47	$17.33	5.5	3.8
	Port Kelly, WA/Wallula, WA	$18.06	$18.24	$17.11	5.5	3.7
	Umatilla, OR	$17.96	$18.14	$17.01	5.6	3.7
	Boardman, OR/Hogue Warner, OR	$17.69	$17.87	$16.75	5.6	3.7
	Arlington, OR/Roosevelt, WA	$17.53	$17.71	$16.59	5.6	3.6
	Biggs, OR	$16.15	$16.33	$15.26	5.8	3.2
	The Dalles, OR	$15.01	$15.19	$14.16	6.0	2.9

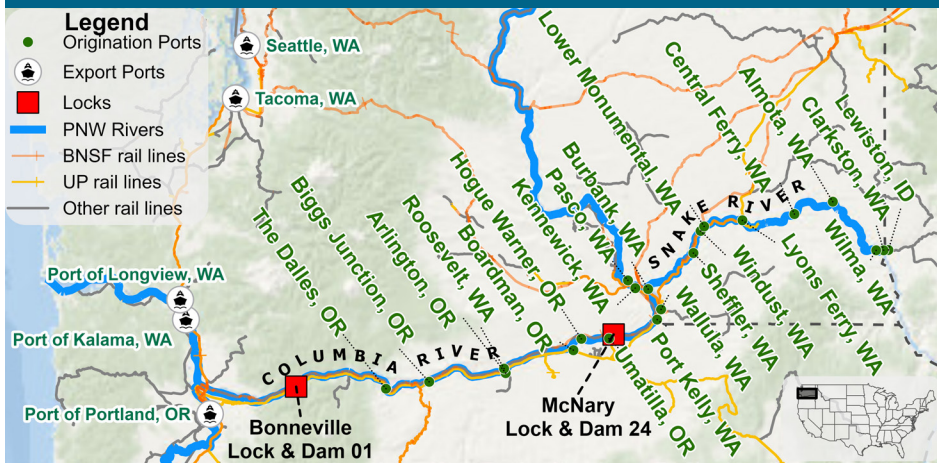
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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

December, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	405	0	405
Columbia River (Bonneville Lock and Dam (L1))	457	0	457
Monthly total 2025	457	0	457
Monthly total 2024	264	0	264
2025 YTD	4,326	0	4,326
2024 YTD	3,523	0	3,523

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.

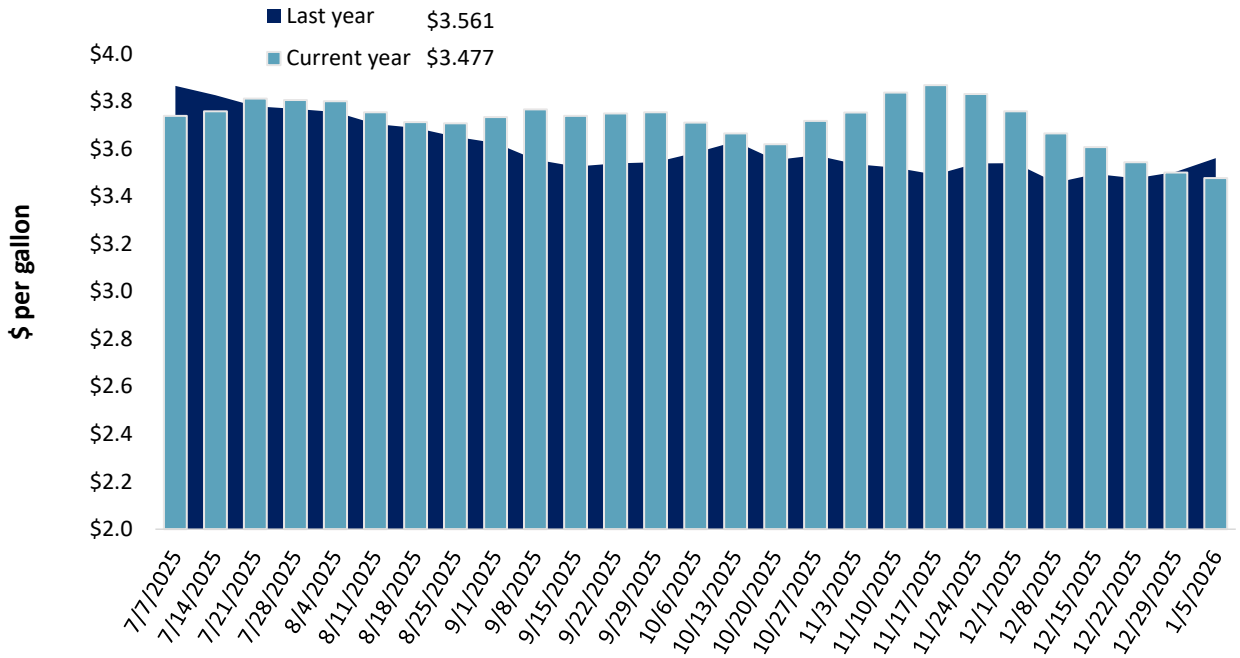
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 1/05/2026 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.630	-0.015	-0.004
	New England	4.024	-0.011	0.253
	Central Atlantic	3.872	-0.003	0.071
	Lower Atlantic	3.502	-0.020	-0.057
II	Midwest	3.387	-0.037	-0.143
III	Gulf Coast	3.172	-0.012	-0.097
IV	Rocky Mountain	3.222	-0.011	-0.208
V	West Coast	4.128	-0.028	-0.019
	West Coast less California	3.683	-0.036	-0.056
	California	4.641	-0.019	0.023
Total	United States	3.477	-0.023	-0.084

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 January 5, the U.S. average diesel fuel price decreased 2.3cents from the previous week to $3.477 per gallon, 8.4 cents below the same week last year.

Note: On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
Source: U.S. Department of Energy, Energy Information Administration.

Table 14. U.S. export balances and cumulative exports (1,000 metric tons)

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 1/1/2026	1,456	752	1,353	1,354	138	5,054	23,481	12,229	40,764
	This week year ago	1,064	731	1,487	1,245	128	4,654	22,634	10,429	37,717
	Last 4 wks. as % of same period 2024/25	152	111	92	116	108	116	108	119	112
Current shipped (cumulative) exports sales	2025/26 YTD	5,840	1,994	3,753	3,199	277	15,062	27,414	16,347	58,823
	2024/25YTD	2,952	1,822	4,074	3,307	208	12,363	16,612	29,752	58,726
	YTD 2025/26 as % of 2024/25	198	109	92	97	133	122	165	55	100
	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 1/1/2026	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	17,399	15,271	14	19,839
Japan	7,461	5,167	44	10,478
Colombia	3,850	3,824	1	5,493
China	0	26	-100	3,461
Korea	4,465	1,282	248	3,127
Top 5 importers	28,710	24,289	18	39,272
Total U.S. corn export sales	50,895	39,246	30	54,276
% of YTD current month's export projection	63%	54%	-	-
Change from prior week	378	445	-	-
Top 5 importers' share of U.S. corn export sales	56%	62%	-	72%
USDA forecast December 2025	81,284	72,597	12	-
Corn use for ethanol USDA forecast, December 2025	142,240	138,075	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 1/1/2026	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	6,893	19,036	-64	26,078
Mexico	3,478	3,287	6	4,762
Japan	1,196	1,121	7	2,107
Egypt	2,554	1,758	45	2,098
Indonesia	1,149	902	27	1,997
Top 5 importers	15,270	26,104	-42	37,042
Total U.S. soybean export sales	28,576	40,181	-29	48,941
% of YTD current month's export projection	64%	78%	-	-
Change from prior week	878	150	-	-
Top 5 importers' share of U.S. soybean export sales	53%	65%	-	76%
USDA forecast, December 2025	44,497	51,220	-13	-

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 1/1/2026	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	3,391	3,151	8	3,358
Philippines	2,303	2,197	5	2,473
Japan	1,666	1,666	0	2,045
China	199	139	43	1,137
Korea	1,667	1,826	-9	1,674
Taiwan	782	732	7	935
Thailand	520	768	-32	667
Nigeria	1,220	403	203	629
Indonesia	942	641	47	518
Colombia	589	348	69	489
Top 10 importers	13,279	11,870	12	13,926
Total U.S. wheat export sales	20,116	17,016	18	19,135
% of YTD current month's export projection	82%	76%	-	-
Change from prior week	119	111	-	-
Top 10 importers' share of U.S. wheat export sales	66%	70%	-	73%
USDA forecast, December 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.

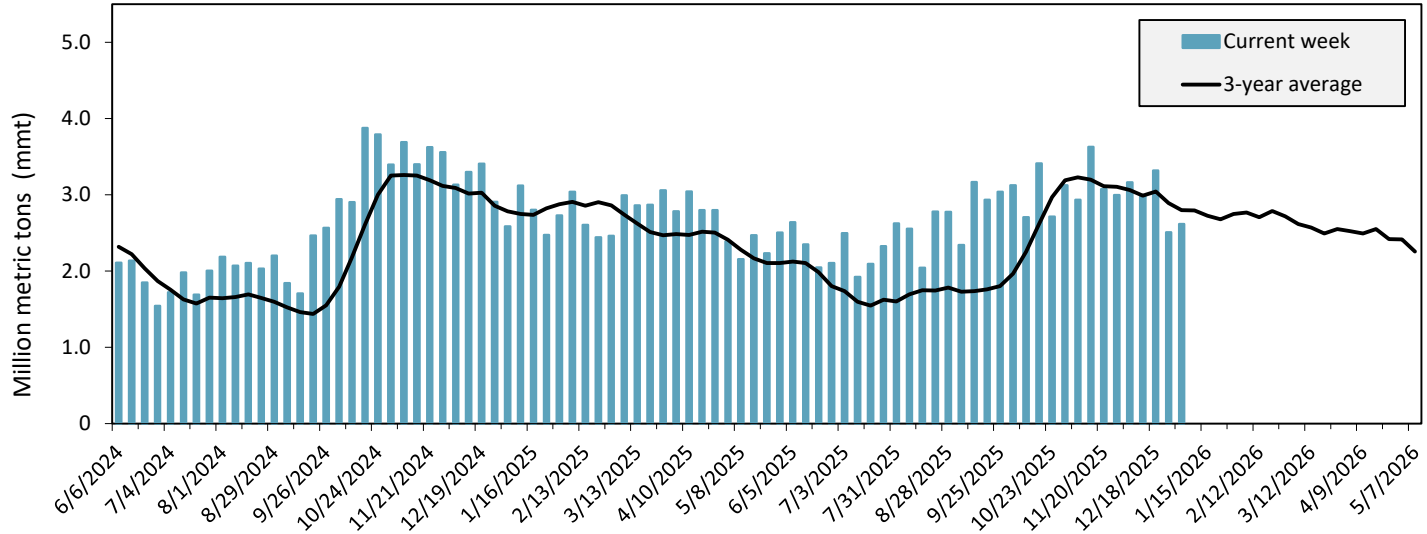
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 01/01/2026	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	519	405	128	24,141	13,987	173	203	268	13,987
	Soybeans	134	67	199	2,957	10,580	28	21	21	10,445
	Wheat	100	215	46	12,271	11,453	107	123	141	11,453
	All grain	828	687	121	39,648	37,321	106	106	118	37,186
Mississippi Gulf	Corn	439	631	70	37,189	27,470	135	120	134	27,407
	Soybeans	637	510	125	23,350	29,810	78	60	65	29,741
	Wheat	12	66	18	3,987	4,531	88	138	152	4,523
	All grain	1,088	1,207	90	64,566	61,930	104	82	90	61,789
Texas Gulf	Corn	0	0	n/a	590	570	103	98	60	570
	Soybeans	57	0	n/a	1,431	741	193	60	106	741
	Wheat	33	0	n/a	4,690	1,940	242	91	136	1,940
	All grain	256	57	446	7,825	6,965	112	113	118	6,965
Interior	Corn	244	254	96	15,495	13,463	115	142	145	13,463
	Soybeans	88	157	56	7,683	8,059	95	80	93	8,059
	Wheat	38	9	441	3,065	2,989	103	74	84	2,989
	All grain	373	444	84	26,767	24,791	108	108	118	24,791
Great Lakes	Corn	0	40	0	414	271	153	106	283	271
	Soybeans	0	0	n/a	63	136	46	n/a	n/a	136
	Wheat	0	29	0	434	653	67	83	96	653
	All grain	0	69	0	911	1,060	86	84	108	1,060
Atlantic	Corn	5	5	99	607	410	148	149	153	410
	Soybeans	65	39	167	1,085	1,272	85	64	64	1,272
	Wheat	0	0	n/a	81	73	112	n/a	n/a	73
	All grain	69	43	159	1,773	1,754	101	70	70	1,754
All Regions	Corn	1,207	1,335	90	78,436	56,172	140	145	165	56,109
	Soybeans	981	774	127	36,821	51,069	72	54	59	50,865
	Wheat	183	319	58	24,528	21,639	113	109	129	21,631
	All grain	2,615	2,509	104	141,743	134,291	106	93	102	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. grain export shipments departed through the U.S. Gulf region and 27 percent departed through the PNW.

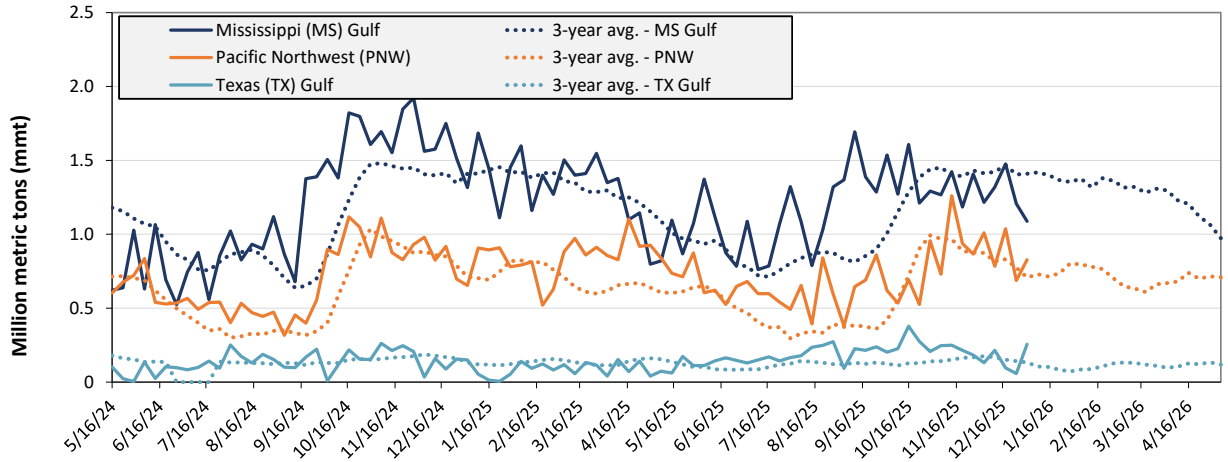
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending January 01: 2.6 mmt of grain inspected, up 4 percent from the previous week, unchanged from the same week last year, and down 7 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 01/01/26 inspections (mmt):
MS Gulf: 1.09
PNW: 0.83
TX Gulf: 0.26

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 10	up 346	up 6	up 21
Last year (same 7 days)	down 15	up 71	down 6	up 12
3-year average (4-week moving average)	down 23	up 94	down 13	up 17

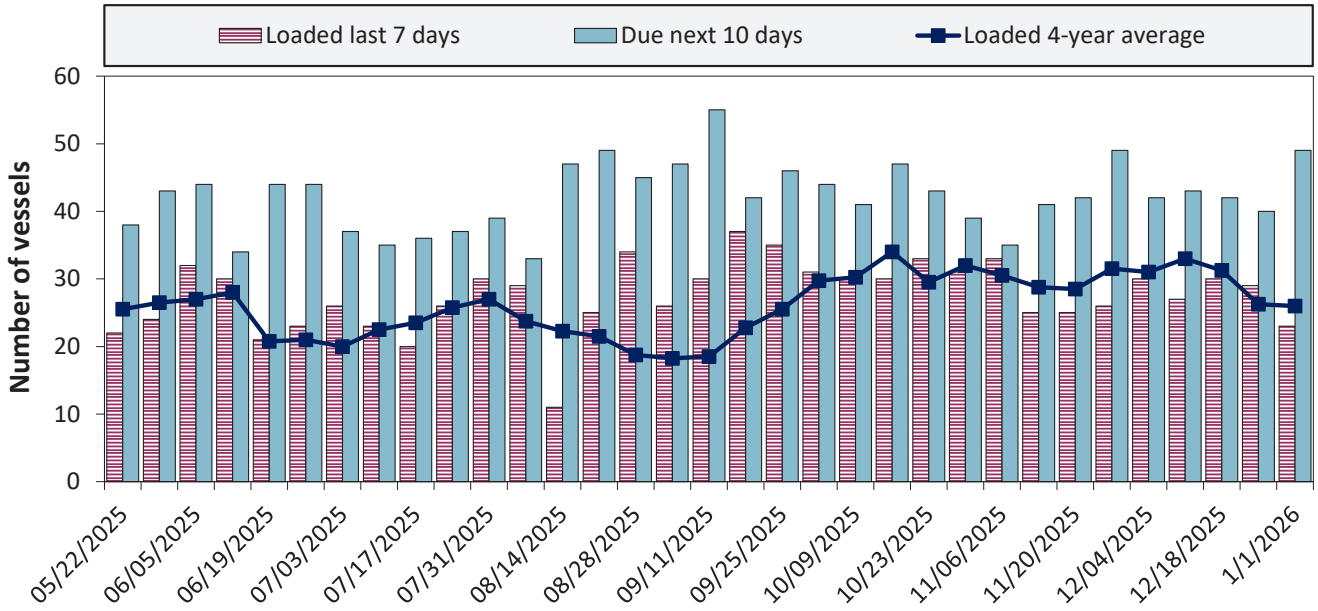
Source: USDA, Federal Grain Inspection Service.

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
1/1/2026	29	23	49	n/a
12/25/2025	32	29	40	n/a
2025 range	(12…40)	(11…37)	(26…55)	(5…25)
2025 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.
Source: USDA, Agricultural Marketing Service.

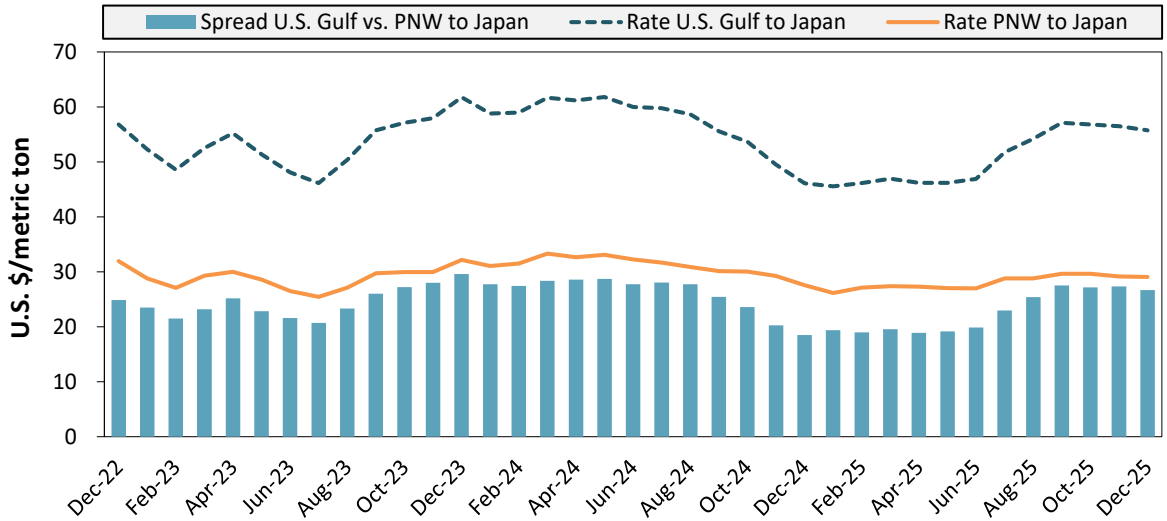
Figure 19. U.S. Gulf vessel loading activity



Week ending 1/1/26, number of vessels	Loaded	Due
Change from last year	-12%	-4%
Change from 4-year average	-12%	-11%

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
December 2025	$55.75	$29.08	$26.67
Change from December 2024	21%	5%	44%
Change from 4-year average	-5%	-10%	1%

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

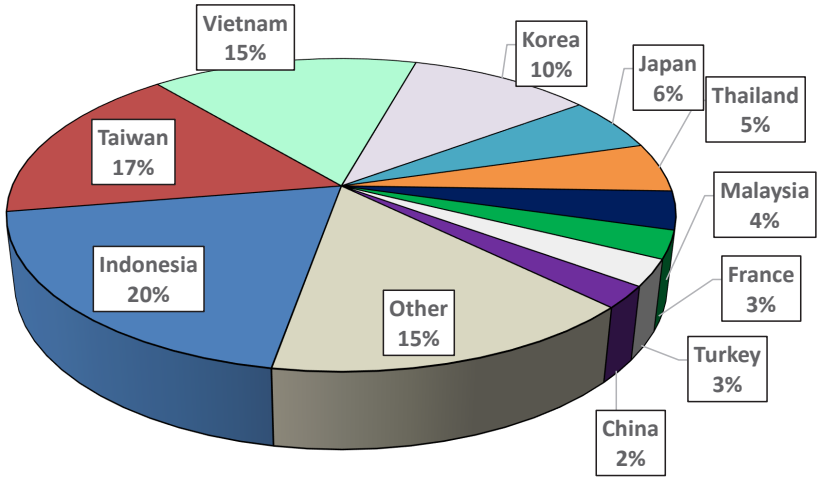
Table 20. Ocean freight rates for selected shipments, week ending 01/03/2026

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy grain	Dec 23, 2025	Feb 1/28, 2026	66,000	46.00
U.S. Gulf	N. China	Heavy grain	Nov 27, 2025	Dec 22/31, 2025	66,000	56.00
U.S. Gulf	S. Korea	Soybeans	Dec 4, 2025	Dec 20/30, 2025	58,000	65.50
U.S. Gulf	S. Korea	Heavy grain	Aug 12, 2025	Oct 1/10, 2025	58,000	63.75
U.S. Gulf	Indonesia	Soybeans	Sep 17, 2025	Oct 15/Nov 5, 2025	68,000	50.50
U.S. Gulf	Bangladesh	Soybeans	Sep 23, 2025	Oct 1/10, 2025	55,000	65.75
PNW	China	Heavy grain	Nov 28, 2025	Jan 1/31, 2025	65,000	29.25
PNW	China	Soybeans	Nov 28, 2025	Dec 25/31, 2025	68,000	32.75
PNW	Taiwan	Wheat	Nov 13, 2025	Jan 26/Feb 5, 2025	52,000	40.25
PNW	Taiwan	Wheat	Sep 03, 2025	Nov 1/10, 2025	46,000	49.00
PNW	S. Korea	Corn	Nov 20, 2025	Jan 1/10, 2026	65,000	33.28
PNW	Taiwan	Wheat	Aug 28, 2025	Oct 1/10, 2025	46,000	48.00
Brazil	China	Heavy grain	Dec 17, 2025	Jan1/10, 2026	66,000	33.00
Brazil	N. China	Heavy grain	Oct 9, 2025	Nov 1/7, 2025	66,000	40.00
Brazil	S. Korea	Soybeans	Nov 25, 2025	Dec 1/10, 2025	60,000	47.25

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.

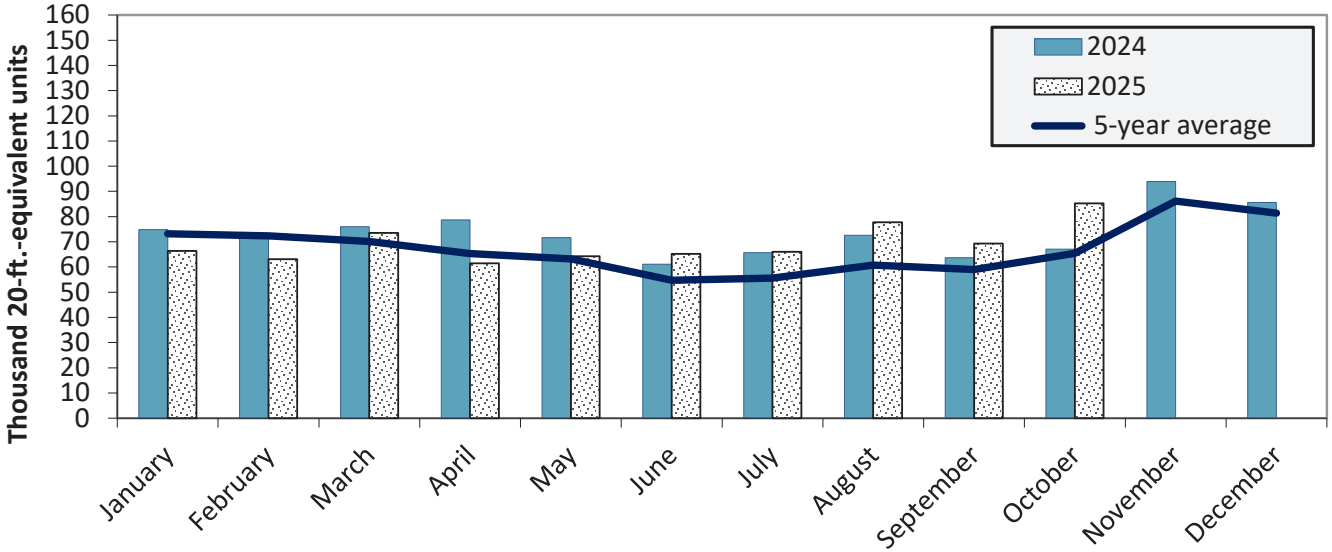
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Oct 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 October 2025 were up 27.0 percent from last year and up 30.3 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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