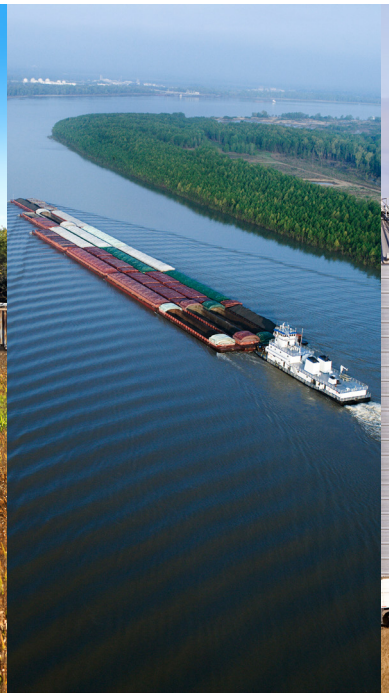
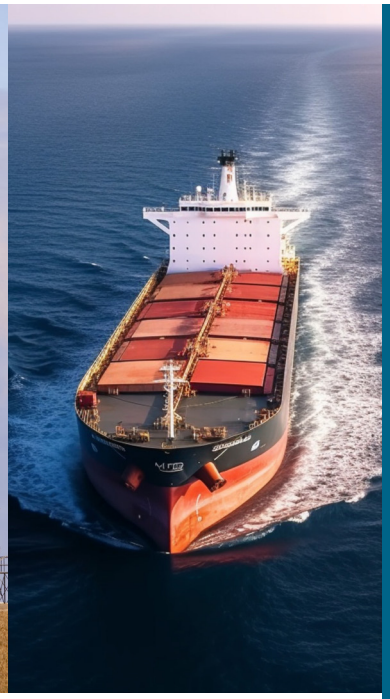
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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Storms in Northern Plains Damage Grain Transportation Infrastructure. Last weekend, severe storms in North Dakota damaged grain transportation and handling facilities, derailed a train, washed out track, and blew stored grain cars off a track.

According to *Trains*, 30 cars from a Canadian Pacific Kansas City (CPKC) train were derailed about 3 miles southeast of Enderlin, ND, on June 20. On June 21, a large number of stored BNSF Railway (BNSF) grain cars were blown off the track near Mayfield, ND, and a BNSF track was washed out near Sanborn, ND.

Both on- and off-farm grain storage was also affected. For example, in Voltaire, ND (on CPKC's line), strong winds knocked over two large grain silos, and damaged others at the Dakota Midland Grain elevator. While total damage, across the State, is still being assessed, North Dakota's Agriculture Commissioner estimates the storms have cost North Dakota tens of millions of bushels in grain storage.

BNSF and UP Hold Auctions for Shuttle Trains. On June 25, BNSF Railway (BNSF) held an auction for 17 shuttle train contracts (of 1 year each) that begin in December 2025 and January 2026. BNSF sold the 17 shuttles for $10.5 million. The winning bids ranged from $550,000 to $815,000, and they averaged $616,000. Last month, over the course of three auctions, BNSF sold 85 shuttles, and winning bids averaged $740,000 per shuttle (*Grain Transportation Report* (GTR), May 29, 2025, second highlight).

On June 23, Union Pacific Railroad (UP) held its first auction for yearlong shuttle contracts, which are set to begin in the second half of 2025 (July-December). UP offered a total of 47 shuttles, and the railroad sold 20 of them—all for $0. UP has run about 85 shuttle trains during the harvest peak in recent years.

Tight Supply Keeps Lease Rates for Covered Hopper Railcars Elevated. In a June 2025 article of *Railway Age* (starting on page 12), an industry expert noted that rail car lease rates have persisted high because of railroads' "dearth of new rail car orders" across commodity categories, including grain: limited availability of rail cars has kept prices elevated from the long-term average (though down from highs of a few years ago).

The article listed current monthly rates for several rail car types used to transport grain: large covered hoppers (C-114) range from high $500s to low $600s (full service for a 5-year contract). Small covered hoppers (C-113) range from high $300s to low $400s. The C-113 cars are important for short line railroads, whose tracks cannot always handle the larger (C-114) cars. Pressure differential cars—used to ship grain products—are in the high $600s.

Although they are higher than historical averages, covered hopper lease rates are similar to rates from last fall (GTR, October 17, 2024, third highlight).

FHWA Offers Funding for Large Bridges and Small Rural Bridges. On June 2, the Department of Transportation's Federal Highway Administration (FHWA) announced nearly $4.9 billion in available fiscal year (FY) 2026 funding for large bridge projects (costing more than $100 million) through the Bridge Investment Program (BIP). The same press release also noted up to $500 million available for repairing or replacing bridges in rural areas through the Competitive Highway Bridge Program (CHBP).

FHWA expects the CHBP funding opportunity to help repair or replace some of the tens of thousands of eligible bridges across the country—including approximately 42,000 bridges in poor condition.

Applications for BIP are due by August 1. Applications for CHBP are due by August 4.

Diesel Price Jumps 20 Cents, Largest Increase Since 2024. For the week ending June 23, the U.S. average diesel fuel price increased 20.4 cents from the previous week to $3.775 per gallon, 0.6 cents above the same week last year. This change marks the largest week-to-week increase since the 21-cent rise for the week ending February 12, 2024. From the week ending June 2 to the week ending June 23, the diesel price rose a total of 32.4 cents. The week ending June 23 also marks the first time this year the diesel price has been higher than the same period last year.

Prices rose in all 8 Energy Information Administration regions, and 7 regions had double-digit increases. The Midwest saw the largest price increase of 24 cents—the region's second largest since its 30-cent increase for the week ending February 12, 2024.

For additional transportation news related to grain and other agricultural products, see the Transportation Updates and Regulatory News page on AgTransport. A dataset of all news entries since January 2023 is also available on AgTransport.

Export Sales

For the week ending June 12, **unshipped balances** of corn and soybeans totaled 17.27 million metric tons (mmt), down 4 percent from last week and up 19 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26, which began on June 1, was 5.89 mmt, up 1 percent from last week and up 22 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 0.90 mmt, up 14 percent from last week. Net **soybean export sales** were 0.54 mmt, up significantly from last week. Net **wheat export sales** for MY 2025/26 were 0.43 mmt, up 10 percent from last week.

Rail

U.S. Class I railroads originated 24,672 **grain carloads** during the week ending June 14. This was a 2-percent increase from the previous week, 10 percent more than last year and 14 percent more than the 3-year average.

Average June **shuttle secondary railcar bids/offers** (per car) were $88 below tariff for the week ending June 19. This was $13 more than last week and $138 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $100 above tariff. This was $50 more than last week and $50 lower than this week last year.

Barge

For the week ending June 21, **barged grain movements** totaled 759,700 tons. This was 4 percent more than the previous week and 81 percent more than the same period last year.

For the week ending June 21, 485 grain barges **moved down river**—14 fewer than last week. There were 531 grain barges **unloaded** in the New Orleans region, 15 percent fewer than last week.

Ocean

For the week ending June 19, 21 **oceangoing grain vessels** were loaded in the Gulf—17 percent more than the same period last year. Within the next 10 days (starting June 20), 44 vessels were expected to be loaded—38 percent more than the same period last year.

As of June 19, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $47.75, up 3 percent from the previous week. The rate from the Pacific Northwest to Japan was $27.25 per mt, up 1 percent from the previous week.

Railroads Adjust Wheat Rail Tariff Rates for MY 2025/26

Unlike corn and soybeans, which ship mainly by truck, the majority of wheat ships by rail. According to **USDA's annual grain *Modal Share Analysis***, railroads moved 56 percent of U.S.-grown wheat in 2022. Because of wheat's dependence on rail—wheat prices, domestic wheat flows, and exports respond to changes in rail tariff rates (the base rates for shipping wheat by rail).

This article begins by summarizing available data on wheat production and exports at the start of marketing year (MY) 2025/26. Next, recent changes to wheat's rail tariff rates are described for the two largest wheat classes—hard red winter (HRW) and hard red spring (HRS). Lastly, the article examines a current case before the Surface Transportation Board (STB) involving HRS wheat shipments to the Texas Gulf.

A Look at Early USDA Data on MY 2025/26 Wheat Production

USDA's full HRW and HRS supply (and demand) projections will be released in the July 11 *World Agricultural Supply and Demand Estimates* report. In the meantime, a handful of **USDA National Agricultural Statistics Service (NASS) reports** offer an early look at the supply of each class, which will translate (to some degree) into rail shipments.

HRW Wheat. The largest wheat class (with a 39-percent share in MY 2024/25), HRW wheat is grown in areas ranging from northern Texas to Montana. Production is centered in Kansas and nearby areas in northern Oklahoma and eastern Colorado. From these production areas, HRW wheat is shipped by rail to flour mills or to export terminals—primarily, in the Texas Gulf region.

The HRW harvest is progressing slowly this year because of heavy rains in Kansas and Oklahoma. For the **week ending June 22**, Kansas was 20 percent complete with its winter wheat harvest, and Oklahoma was 35 percent complete—11 percentage points and 38 percentage points behind the 5-year average, respectively. Nationwide, **NASS forecasts** a harvest of 782 million bushels of HRW wheat in MY 2025/26—if realized, the highest total since MY 2019/20.

HRS Wheat. Grown primarily in the Northern Plains, HRS wheat is the second-largest wheat class (with a 26-percent share in MY 2024/25). The largest producing State is North Dakota. Like HRW wheat, HRS wheat is shipped by rail to flour mills or to export terminals—mainly, in the Pacific Northwest (PNW).

Although USDA's July HRS forecast will be more comprehensive and up to date, NASS's March ***Prospective Plantings* report** showed farmers' intention to plant 10.0 million acres of (non-durum) spring wheat in MY 2025/26. That total is 11 percent below the 5-year average and, if realized, the lowest acreage in over 50 years.

U.S. Wheat Exports Projected to Rise in MY 2025/26

According to the June **Wheat Outlook report** from USDA's Economic Research Service, total U.S. wheat exports are projected to total 825 million bushels in MY 2025/26—the highest since MY 2020/21. This projection is based on the "fast pace of export sales and larger domestic supplies."

Export sales have been especially strong for HRW wheat. For the week ending June 12, total MY 2025/26 HRW wheat export sales were 2.45 million metric tons (mmt)—66 percent above the prior 5-year average (for the same week). HRS wheat exports were also above average, though less sharply than HRW wheat. For the week ending June 12, total MY 2025/26 HRS wheat export sales were 1.77 mmt—11 percent above the prior 5-year average (for the same week).

HRW Wheat Rail Tariff Rate Adjustments

On the HRW corridor from the Southern Plains to the Gulf, competition exists among BNSF Railway (BNSF), Union Pacific Railroad (UP), and—to a lesser degree—various barge operators (as wheat can be **loaded on the Arkansas River at the Port of Catoosa**).

Currently, in light of above-average supplies and strong export sales, the railroads are competing by cutting tariff rates to the Gulf,

estimating they can make up for the lower rates through higher volumes. For shipments to domestic flour mills, BNSF rates are falling, and UP rates are rising. The new HRW wheat rates (effective June 1) are incorporated in **Grain Transportation Report (GTR) table 6**.

BNSF. BNSF has implemented broad rate cuts for HRW wheat. For example, the tariff rate for a shuttle train from Wichita, KS, to Houston, TX, fell $511 to $3,900 per car (12-percent decline)—the largest drop for that rate since at least 2010 and the first time since December 2016 that rate has been less than $4,000 per car (fig. 1).

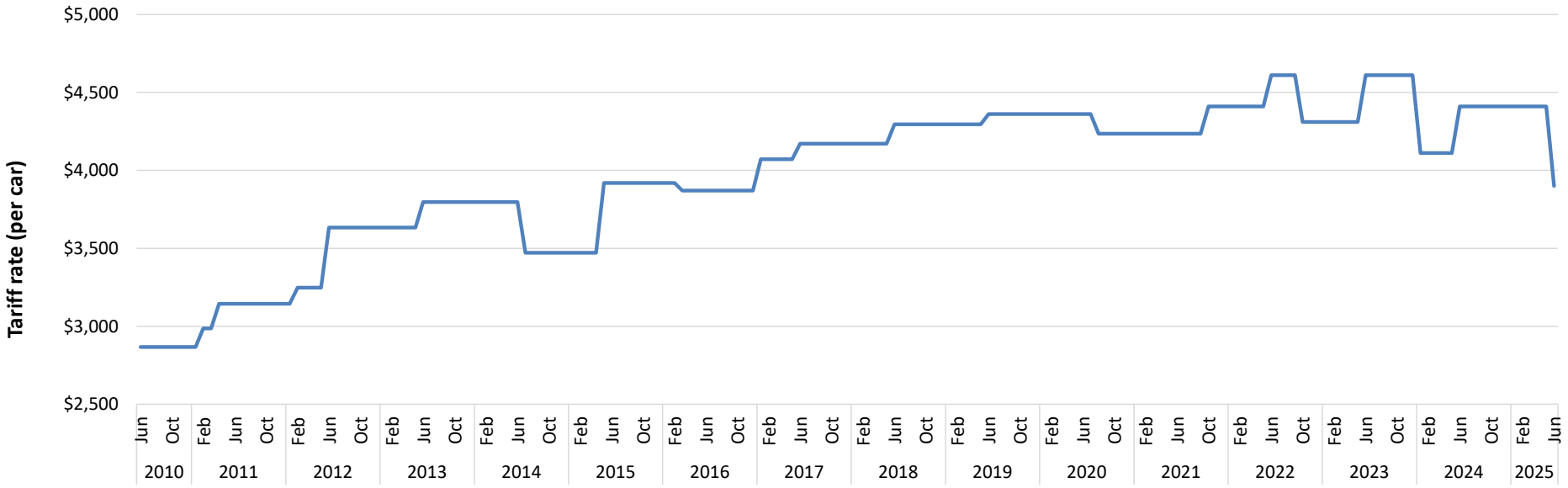
BNSF instituted similar cuts to other major HRW wheat export lanes: shuttles from Enid, OK, to Houston fell $597 per car (14-percent decline); Garden City, KS, to Houston fell $582 per car (12-percent decline); and Salina, KS, to Houston, fell $605 per car (13-percent decline).

BNSF's rates to Mexico also fell. For example, from Fort Worth, TX, to the U.S.-Mexico border, shuttle rates fell $800 per car (22-percent decline) (**GTR table 8**).

BNSF also cut domestic rates—most notably for shipments moving east. For example, shuttles from Wichita to Birmingham, AL, fell $591 per car (14-percent decline). For domestic efficiency trains (DETs) from Wichita to Chicago, IL (for eastern interchange), rates fell $517 per car (12-percent decline).[1] Moving west, DETs from Garden City to the California milling market fell just $27 per car (less than 1-percent decline).

UP. UP implemented wheat tariff adjustments, both up and down. For domestic wheat shipments (e.g., west Kansas to the Kansas City milling market), tariff rates rose by $100 per car. Rates to Mexico fell $200 per car (**GTR table 8**).

Figure 1. BNSF Railway's wheat tariff rate (per car) from Wichita, KS, to Houston, TX, 2010-25



Note: Tariff rate is applicable for 110-120 car shuttle trains composed of large covered hoppers.
Source: USDA/AMS analysis of BNSF tariff rates. Historical and current rate data are available on AgTransport.

1 BNSF's DETs combine elements of shuttle and manifest service. Like shuttle trains, DETs are made up of 110 cars loaded at a single grain elevator. DETs are then split, en route, to multiple destinations (i.e., flour mills).

For shuttles to Texas Gulf export terminals, where UP competes with BNSF, rates fell $400 per car. However—at least for moving HRW wheat exports through the Salina-to-Houston lane—UP's tariff did not drop enough to undercut BNSF. As shown in **GTR table 6,** in terms of the total freight rate (tariff and fuel surcharge), BNSF now has an advantage of 5 cents per bushel over UP for Salina export shipments. In May, before the rate cuts on June 1, the railroads' total freight rates for that lane had been the same.

HRS Wheat Rail Tariff Rate Adjustments

BNSF and Canadian Pacific Kansas City (CPKC) serve HRS-wheat-producing areas in the Northern Plains, and they compete on domestic shipments (e.g., Chicago interchange) as well as export shipments—primarily to the PNW. For both railroads, new HRS wheat rates will take effect on August 1. (HRS wheat is mostly harvested in September.)

BNSF has announced rate increases for HRS wheat shipments—including both domestic shipments and export shipments. CPKC announced rate cuts to PNW export terminals, but increases in domestic rates to Chicago (for eastern interchange).

BNSF. BNSF intends to raise tariff rates for shipments of HRS wheat. For export shuttle train movements, rates to the PNW and Great Lakes (e.g., Duluth, MN) will rise $200 per car, and rates to the Texas Gulf and Mexico will rise $300 per car. Rates for domestic movements (e.g., DETs and manifest) are also set to rise. The rate to ship HRS wheat to Chicago (for eastern interchange) will rise $200 per car for all origins. Last year, BNSF raised rates for all these lanes by $300 per car.

CPKC. CPKC intends to raise some tariff rates, and lower others. Rates for shuttles to PNW export terminals will fall by $200 per car, while rates to Chicago (for eastern interchange) will rise by $200 per car. Last year, CPKC raised tariff rates for these lanes by $300 per car.

Despite having the more direct route, BNSF's tariff rates for shuttle trains from Surrey, ND (located near Minot, ND) to the PNW are $728 (20 cents per bushel) more per car than CPKC's comparable rate from Minot to the PNW. BNSF's network directly connects North Dakota origins to PNW export terminals. For CPKC to deliver from North Dakota to PNW export terminals, the railroad must bring trains north onto CPKC's Canadian network and then hand them off to UP (in Eastport, ID) for delivery to the PNW.

Additional Rail Access to Texas Gulf Under STB Review

A pending case before STB, between UP and CPKC, could decide whether CPKC shippers will obtain single-line service from HRS-wheat-producing areas in the Northern Plains to export terminals in the Texas Gulf.[2]

In 2023, CPKC **filed a petition** with STB to gain access to the Port of Houston. In the petition, CPKC claimed that UP is blocking CPKC's wheat shipments to the Ports of Houston and Galveston via a UP line that CPKC claims rights to use.[3] In 1988, when UP acquired the Missouri–Kansas–Texas Railroad (MKT), the Interstate Commerce Commission (STB's predecessor) granted trackage rights to the Kansas City Southern Railway (KCS) to preserve competition after the UP-MKT merger.

According to CPKC, KCS had "somewhat sporadically" over the last 35 years used the rights to the UP-owned line to move grain from Kansas City to the ports of Houston/Galveston. However, the merger between the Canadian Pacific Railroad (CP) and KCS—to form CPKC—has generated interest in single-line service for wheat shipments from the Northern Plains to the Texas Gulf.

UP **responded** by arguing that KCS's trackage rights applied only to grain originating in the Omaha, NE-Kansas City corridor, and not to shipments that originated farther north (e.g., HRS wheat in North Dakota). Additionally, UP argued that CPKC's petition raises a contract dispute that a court or an arbitrator should resolve, rather than STB. The case is pending before STB, but a May update **stated** the STB Chair had "offered a course of action for consideration by the full board" in April.

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2 The petition is filed in STB docket FD 30800 (Sub-No. 22).
3 The Port of Galveston's grain elevator was demolished last year (GTR, September 5, 2024, first highlight).

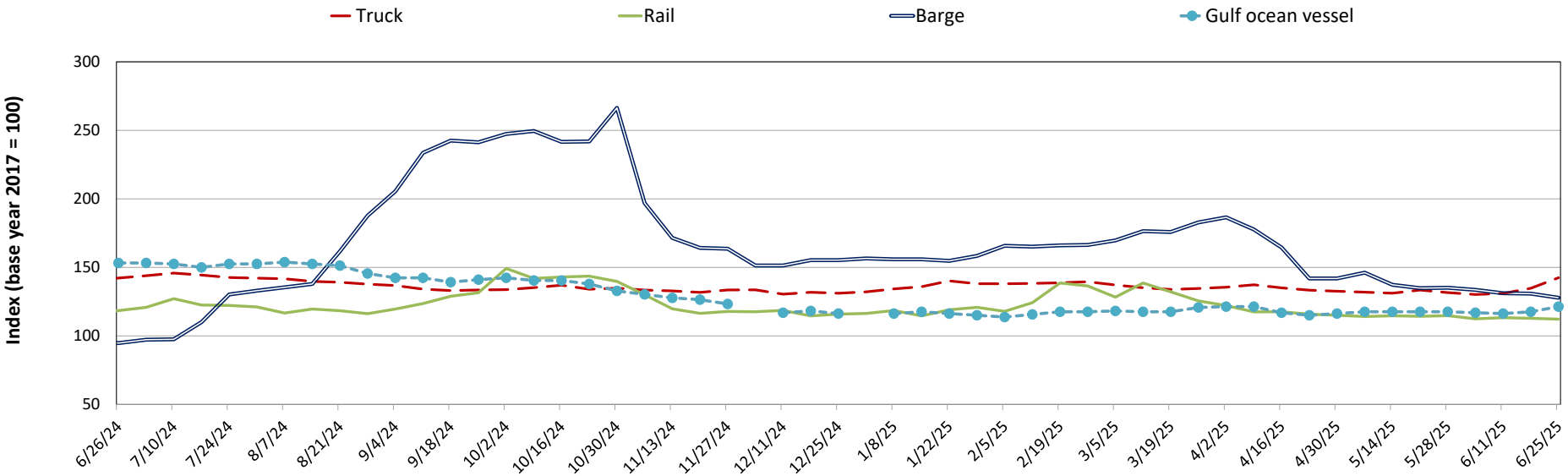
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
06/25/25	142	112	128	121	129
06/18/25	135	113	131	118	128
06/26/24	142	118	95	153	154

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.

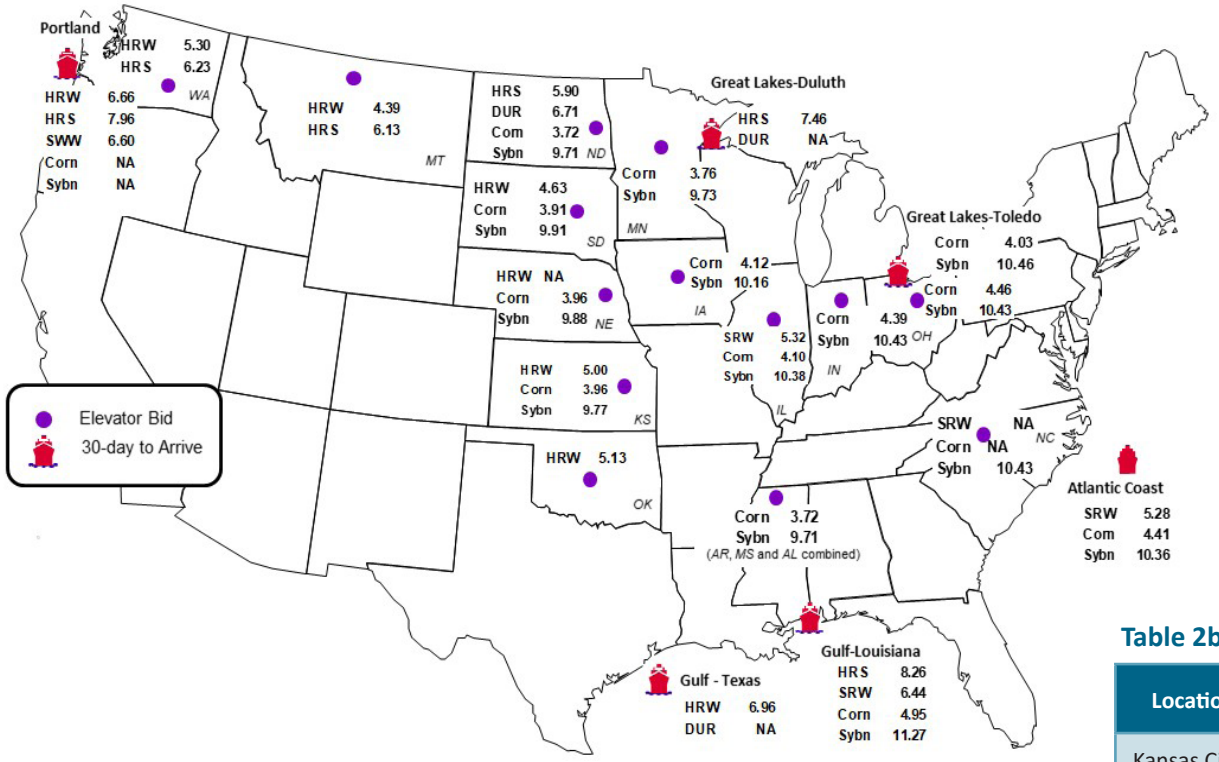
Figure 1. Grain transportation cost indicators as of week ending 6/25/25



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

The grain bid summary illustrates the market relationships for commodities. Positive and negative adjustments in differential between terminal and futures markets, and the relationship to inland market points, are indicators of changes in fundamental market supply and demand. The map may be used to monitor market and time differentials.



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

Table 2a. Market update: U.S. origins to export position price spreads ($/bushel)

Commodity	Origin–destination	6/20/2025	6/13/2025
Corn	IL–Gulf	-0.85	-0.87
Corn	NE–Gulf	-0.99	-1.04
Soybean	IA–Gulf	-1.11	-1.21
HRW	KS–Gulf	-1.96	-1.83
HRS	ND–Portland	-2.06	-1.97

Note: nq = no quote; n/a = not available; HRW = hard red winter wheat; HRS = hard red spring wheat.
Source: USDA, Agricultural Marketing Service.

Table 2b. Futures

Location	Grain	Month	6/20/2025	Week ago 6/13/2025	Year ago 6/21/2024
Kansas City	Wheat	Sep	5.786	5.406	5.860
Minneapolis	Wheat	Sep	6.566	6.342	6.126
Chicago	Wheat	Sep	5.832	5.436	5.680
Chicago	Corn	Sep	4.410	4.444	4.460
Chicago	Soybean	Sep	10.606	10.696	11.220

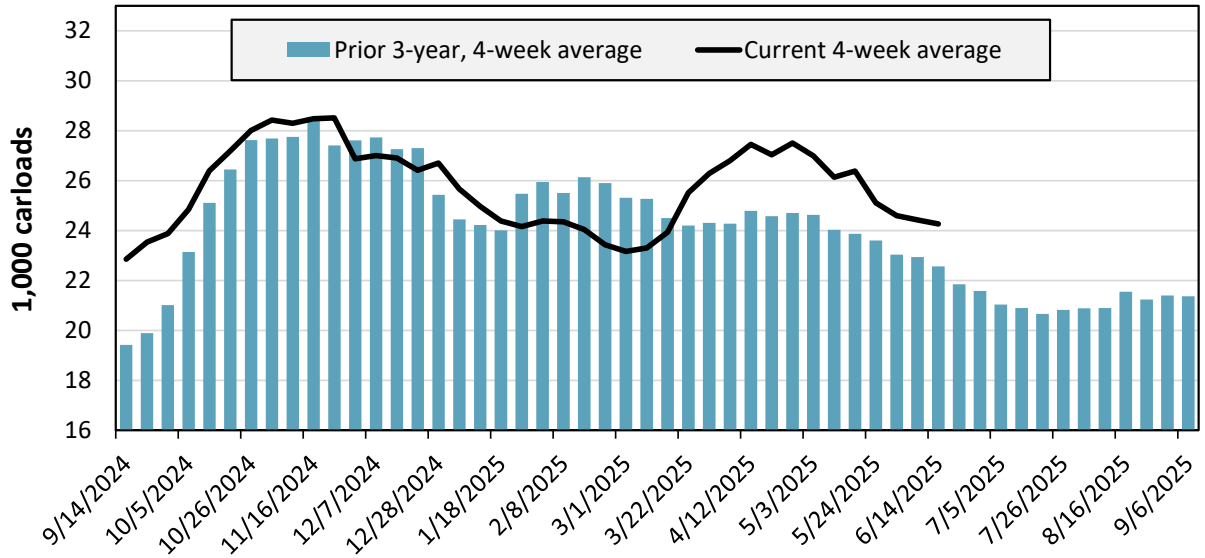
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 6/14/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,234	2,501	10,851	5,181	3,652	1,253	24,672
This week last year	1,726	2,783	9,718	4,923	2,690	678	22,518
2025 YTD	39,299	68,405	261,106	137,620	63,471	33,173	603,074
2024 YTD	40,073	63,412	254,966	125,290	66,819	22,190	572,750
2025 YTD as % of 2024 YTD	98	108	102	110	95	149	105
Last 4 weeks as % of 2024	91	106	101	112	122	193	108
Last 4 weeks as % of 3-yr. avg.	85	100	105	113	129	110	108
Total 2024	87,911	143,353	557,544	279,532	142,383	58,512	1,269,235

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

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



For the 4 weeks ending June 14, grain carloads were down 1 percent from the previous week, up 8 percent from last year, and up 8 percent from the 3-year average.

Source: Surface Transportation Board.

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

For the week ending: 6/13/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	19.7	35.2	13.7	19.2	7.5	13.4	18.1
	Average over last 4 weeks	18.1	32.0	15.6	16.1	6.5	14.8	17.2
	Average of same 4 weeks last year	28.4	38.8	16.5	16.7	7.6	n/a	21.6
Average grain unit train speeds (miles per hour)	This week	22.2	19.7	25.3	22.0	26.4	15.5	21.9
	Average over last 4 weeks	22.1	19.2	25.5	22.7	25.5	17.9	22.1
	Average of same 4 weeks last year	23.2	18.9	24.9	22.7	25.2	n/a	23.0

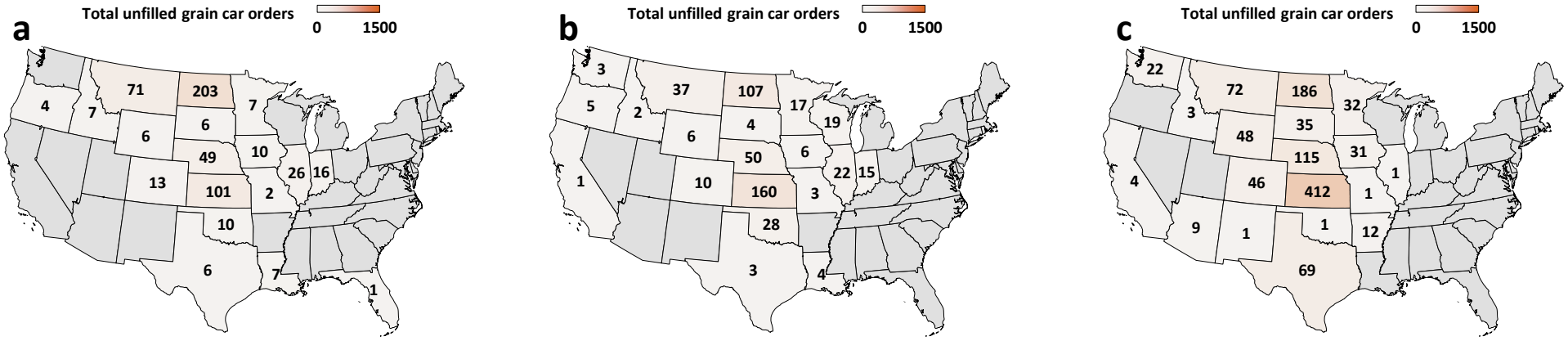
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 6/13/2025		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	10	8	213	74	11	73	389
	Average over last 4 weeks	16	6	192	81	7	197	499
	Average of same 4 weeks last year	13	9	434	110	3	n/a	569
Average number of loaded grain cars not moved in over 48 hours	This week	14	209	215	73	10	557	1,079
	Average over last 4 weeks	28	185	269	65	6	325	877
	Average of same 4 weeks last year	28	273	796	131	9	n/a	1,237
Average number of grain unit trains held	This week	1	1	3	4	0	7	16
	Average over last 4 weeks	0	0	3	4	0	6	13
	Average of same 4 weeks last year	0	2	12	7	0	n/a	22
Total unfilled manifest grain car orders	This week	17	4	323	170	0	31	545
	Average over last 4 weeks	16	7	189	228	0	122	562
	Average of same 4 weeks last year	0	0	604	453	0	n/a	1,057

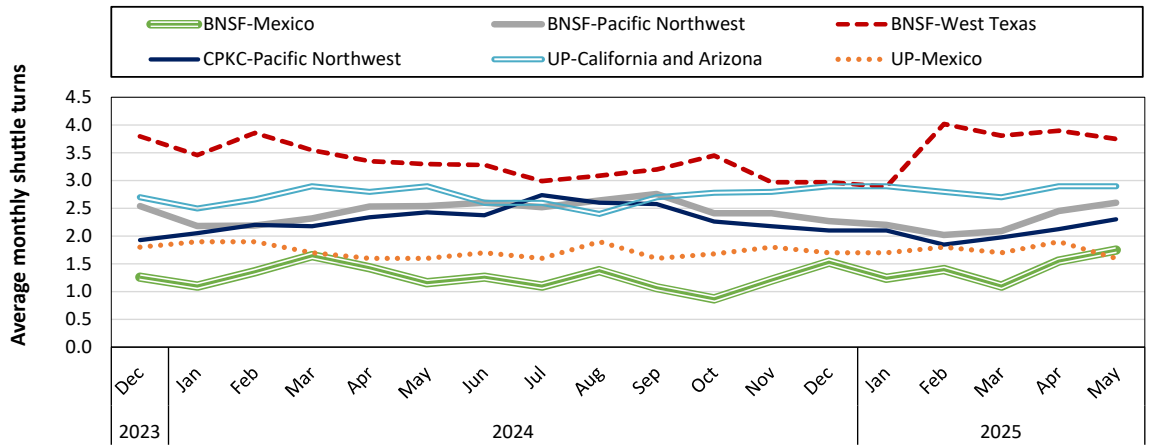
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 6/13/2025 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



Note: Unfilled grain car orders for Kansas City Southern Railway (now part of Canadian Pacific Kansas City) are not included because those metrics are not reported at the State level.
Source: Surface Transportation Board. Map credits: Bing, GeoNames, Microsoft, TomTom.

Figure 5. Average monthly turns for grain shuttle trains, by railroad and region

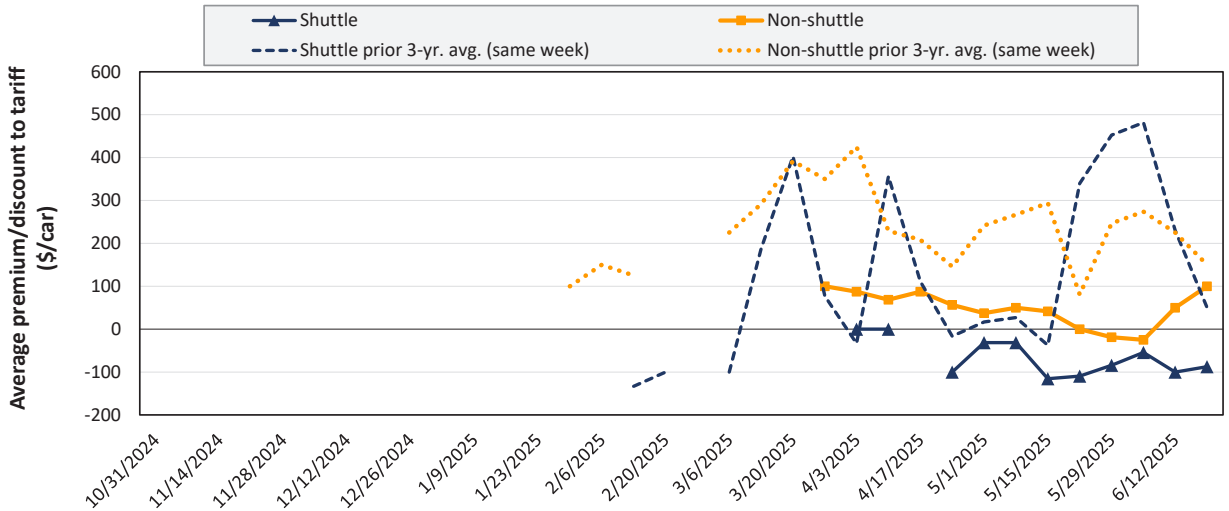


In May 2025, BNSF Railway's average monthly grain shuttle turns were 1.8 to Mexico, 2.6 to the Pacific Northwest, and 3.8 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.6 to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

Note: A "shuttle turn" refers to the number of trips completed per month by a single train. Additional data (including additional regions and planned turns) are available on AgTransport. BNSF=BNSF Railway; CPKC=Canadian Pacific Kansas City; UP=Union Pacific Railroad.
Source: Surface Transportation Board.

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., one year). This ordering system is referred to as the "primary market." Once grain shippers acquire guaranteed freight on the primary market, they can trade that freight with other shippers through a broker. These transactions are referred to as the "secondary market." Secondary rail values are indicators of rail service quality and demand/supply. The values published herein are market indicators only and do not represent guaranteed prices.

Figure 6. Secondary market bids/offers for railcars to be delivered in June 2025



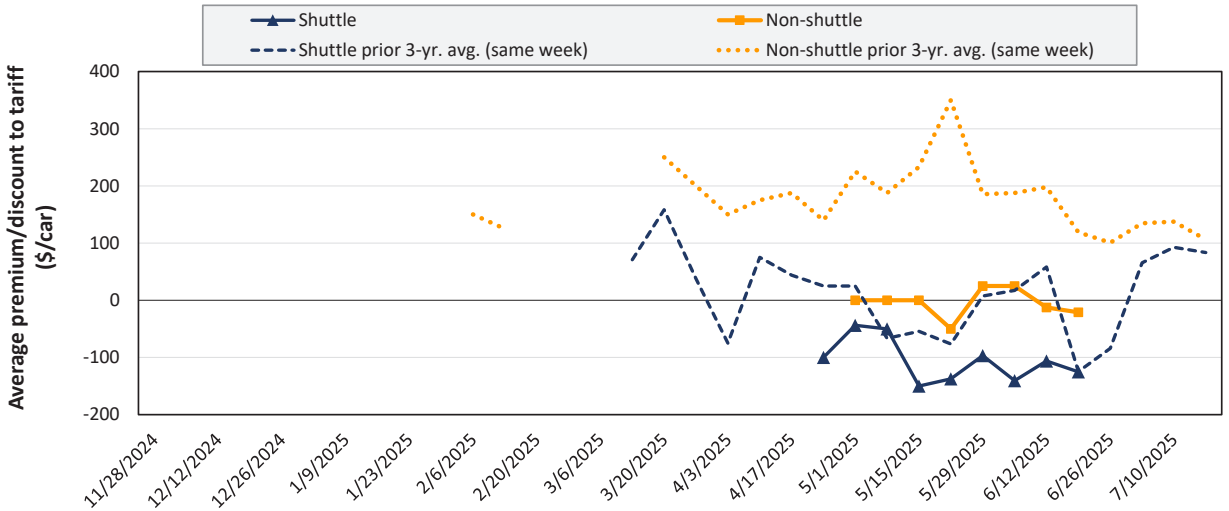
Average non-shuttle bids/offers rose $50 this week, and are at the peak.

Average shuttle bids/offers rose $13 this week and are $88 below the peak.

6/19/2025	BNSF	UP
Non-Shuttle	$100	n/a
Shuttle	$50	-$225

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 July 2025



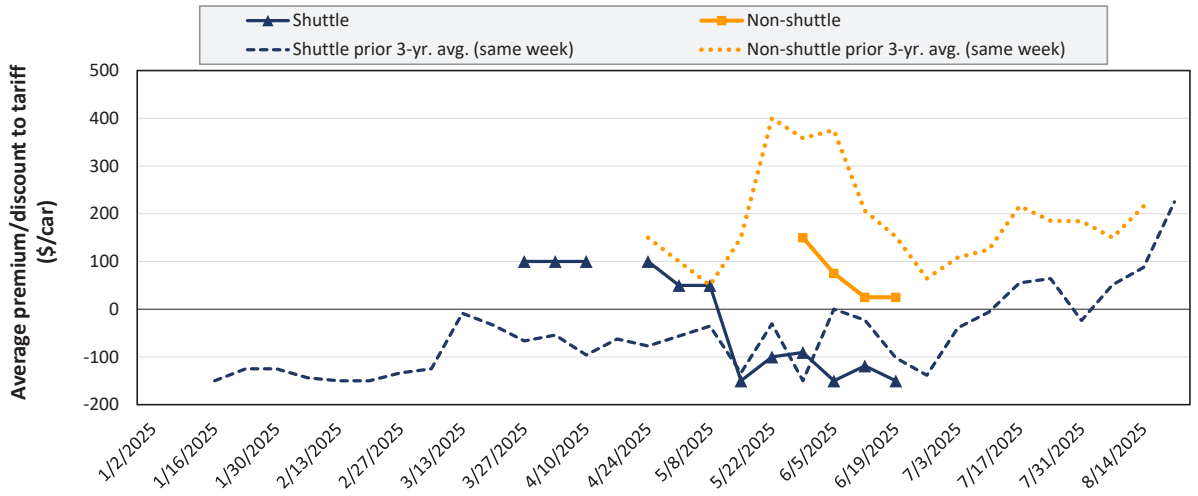
Average non-shuttle bids/offers fell $8 this week, and are $46 below the peak.

Average shuttle bids/offers fell $19 this week and are $81 below the peak.

6/19/2025	BNSF	UP
Non-Shuttle	$58	-$100
Shuttle	$13	-$263

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 August 2025



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

Average shuttle bids/offers fell $31 this week and are $250 below the peak.

6/19/2025	BNSF	UP
Non-Shuttle	$100	-$50
Shuttle	-$50	-$250

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

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

For the week ending: 6/19/2025		Delivery period					
		Jun-25	Jul-25	Aug-25	Sep-25	Oct-25	Nov-25
Non-shuttle	BNSF	100	58	100	100	n/a	n/a
	Change from last week	50	-17	0	n/a	n/a	n/a
	Change from same week 2024	-50	-67	-25	n/a	n/a	n/a
	UP	n/a	-100	-50	0	n/a	n/a
	Change from last week	n/a	0	0	-50	n/a	n/a
	Change from same week 2024	n/a	-175	-100	-25	n/a	n/a
Shuttle	BNSF	50	13	-50	-50	750	n/a
	Change from last week	-50	-26	-12	0	0	n/a
	Change from same week 2024	-150	-88	n/a	0	n/a	n/a
	UP	-225	-263	-250	n/a	n/a	n/a
	Change from last week	75	-13	-50	n/a	n/a	n/a
	Change from same week 2024	-125	-225	-200	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	-50	n/a	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

A tariff is a document issued by railroads that shows rules, rates, and charges for common carrier rail service. The tariff rate, together with fuel surcharges and any primary or secondary freight costs, constitutes the full cost of shipping grain by rail.

Table 6. Rail tariff rates for wheat shipments, June 2025

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	$5,632	$94.96	$5,726.96	$1.55	$56.87	3.0
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,091	$48.88	$4,139.88	$1.12	$41.11	6.0
	CP	Westby, MT	St. Louis, MO	Unit	$6,500	$352.19	$6,852.19	$1.85	$68.05	4.6
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,604	$56.88	$4,660.88	$1.26	$46.28	5.0
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,015	$120.08	$6,135.08	$1.66	$60.92	2.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,665	$23.52	$2,688.52	$0.73	$26.70	11.1
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,432	$122.32	$5,554.32	$1.50	$55.16	2.4
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,638	$101.36	$5,739.36	$1.55	$56.99	2.9
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,212	$83.04	$5,295.04	$1.43	$52.58	3.6
	CP	Minot, ND	Kalama, WA	Unit	$5,498	$372.59	$5,870.59	$1.59	$58.30	3.4
	CP	Nekoma, ND	Chicago, IL	Manifest	$4,830	$223.93	$5,053.93	$1.37	$50.19	4.9
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$51.04	$3,451.04	$0.93	$34.27	-13.0
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$45.04	$3,645.04	$0.99	$36.20	-15.3
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$152.00	$5,952.00	$1.61	$59.11	-15.6
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$110.08	$5,810.08	$1.57	$57.70	-3.0
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$68.72	$4,268.72	$1.15	$42.39	-13.7
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$60.56	$4,060.56	$1.10	$40.32	-14.5
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$69.12	$3,569.12	$0.96	$35.44	-16.1
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$50.64	$3,750.64	$1.01	$37.25	-13.5
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$51.04	$3,951.04	$1.07	$39.24	-12.8
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$348.90	$4,873.90	$1.32	$48.40	-9.4
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$130.50	$5,097.50	$1.38	$50.62	1.0
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$172.20	$3,947.20	$1.07	$39.20	-10.3
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$229.50	$4,254.50	$1.15	$42.25	-9.9
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,591	$61.76	$4,652.76	$1.26	$46.20	4.8
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,239	$60.64	$4,299.64	$1.16	$42.70	5.3
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$26.64	$2,058.64	$0.56	$20.44	-1.7
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	$8,348	$0.00	$8,348.00	$2.26	$82.90	0.0
	CSX	Chicago, IL	Albany, NY	Unit	$7,413	$0.00	$7,413.00	$2.00	$73.61	0.0
	CSX	Chicago, IL	Buffalo, NY	Manifest	$5,924	$0.00	$5,924.00	$1.60	$58.83	0.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	$8,568	$0.00	$8,568.00	$2.32	$85.08	0.0

Note: Chicago, IL, serves as an interchange point between eastern and western Class I railroads. In the table above, all routes with Chicago as either an origin or destination are subject to "Rule 11"—meaning their rate must be combined with a tariff rate from another railroad. (For example, rates for Wichita, KS, to Albany, NY, would combine Wichita to Chicago and Chicago to Albany.) All rates (except Goodland, KS, to Kansas City, MO) are for railroad-owned, large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). The Goodland-to-Kansas City route is for small covered hoppers (C-113), which each carry 100 short tons (90.7 metric tons). A bushel of wheat weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. DET = Domestic Efficiency Trains. DET trains—on BNSF Railway (BNSF) only—are composed of 110 cars loaded at a single origin and split en route to multiple destinations. For mileage calculations, BNSF uses "Seattle, WA" for all Pacific Northwest (PNW) locations and "Houston, TX" for all Texas Gulf locations. HRS = hard red spring. HRW = hard red winter. CP = Canadian Pacific Railway. CSX = CSX Transportation. UP = Union Pacific Railroad. n/a = not available. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.
Source: BNSF, Canadian Pacific Kansas City, CSX, and UP.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, June 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	$85.28	$5,885.28	$1.48	$58.44	3.2
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$134.72	$5,604.72	$1.41	$55.66	-5.6
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$142.08	$6,142.08	$1.55	$60.99	1.7
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$58.24	$5,098.24	$1.29	$50.63	4.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$140.72	$5,490.72	$1.39	$54.53	-5.9
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$74.80	$4,634.80	$1.17	$46.03	4.4
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$61.12	$4,861.12	$1.23	$48.27	4.6
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$74.96	$4,614.96	$1.16	$45.83	4.5
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$113.52	$5,543.52	$1.40	$55.05	-5.2
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$133.28	$5,563.28	$1.40	$55.25	-5.7
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$287.97	$2,368.97	$0.60	$23.53	5.3
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$287.97	$2,748.97	$0.69	$27.30	4.5
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,047	$428.51	$5,475.51	$1.38	$54.37	-4.7
	CP	Glenwood, MN	Boardman, OR	Railroad	$5,513	$412.34	$5,925.34	$1.49	$58.84	0.6
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$5,961	$0.00	$5,961.00	$1.50	$59.20	0.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,139	$0.00	$6,139.00	$1.55	$60.96	0.0
	CSX	Olney, IL	Fairmount, GA	Railroad	$4,706	$0.00	$4,706.00	$1.19	$46.73	0.0
	KCS	Delhi, LA	Morton, MS	Railroad	$1,342	$43.20	$1,385.20	$0.35	$13.76	-0.8
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$207.30	$4,292.30	$1.08	$42.62	5.3
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$471.60	$6,476.60	$1.63	$64.32	2.2
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$521.10	$6,686.10	$1.69	$66.40	1.9
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$214.20	$5,219.20	$1.32	$51.83	4.3
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$352.80	$6,037.80	$1.52	$59.96	3.0
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$216.90	$4,441.90	$1.12	$44.11	5.1
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$122.24	$6,257.24	$1.69	$62.14	-4.8
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$117.52	$6,202.52	$1.68	$61.59	-4.8
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$68.40	$3,468.40	$0.94	$34.44	-25.4
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$129.92	$6,314.92	$1.71	$62.71	-4.9
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$6,235	$133.28	$6,368.28	$1.72	$63.24	-5.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$287.97	$2,368.97	$0.64	$23.53	5.6
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$287.97	$2,748.97	$0.74	$27.30	4.8
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,785	$428.51	$6,213.51	$1.68	$61.70	-4.2
	CP	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$327.51	$3,853.51	$1.04	$38.27	-2.3
	CSX	Casey, IL	Mobile, AL	Private	$3,646	$0.00	$3,646.00	$0.99	$36.21	3.7
	CSX	Marion, OH	Chesapeake, VA	Private	$3,214	$0.00	$3,214.00	$0.87	$31.92	2.6
	UP	Canton, KS	Houston, TX	Railroad	$5,150	$224.10	$5,374.10	$1.45	$53.37	4.1
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$468.60	$6,608.60	$1.79	$65.63	2.2
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$323.40	$5,833.40	$1.58	$57.93	3.2
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$369.30	$5,959.30	$1.61	$59.18	2.9

Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. For mileage calculations, BNSF Railway (BNSF) uses "Seattle, WA" for all Pacific Northwest (PNW) locations and "Houston, TX" for all Texas Gulf locations. CN = Canadian National Railway. CP = Canadian Pacific Railway. CSX = CSX Transportation. KCS = Kansas City Southern Railway. UP = Union Pacific Railroad. n/a = not available. Although CP and KCS have merged into Canadian Pacific Kansas City (CPKC), their public tariffs currently remain separate. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.

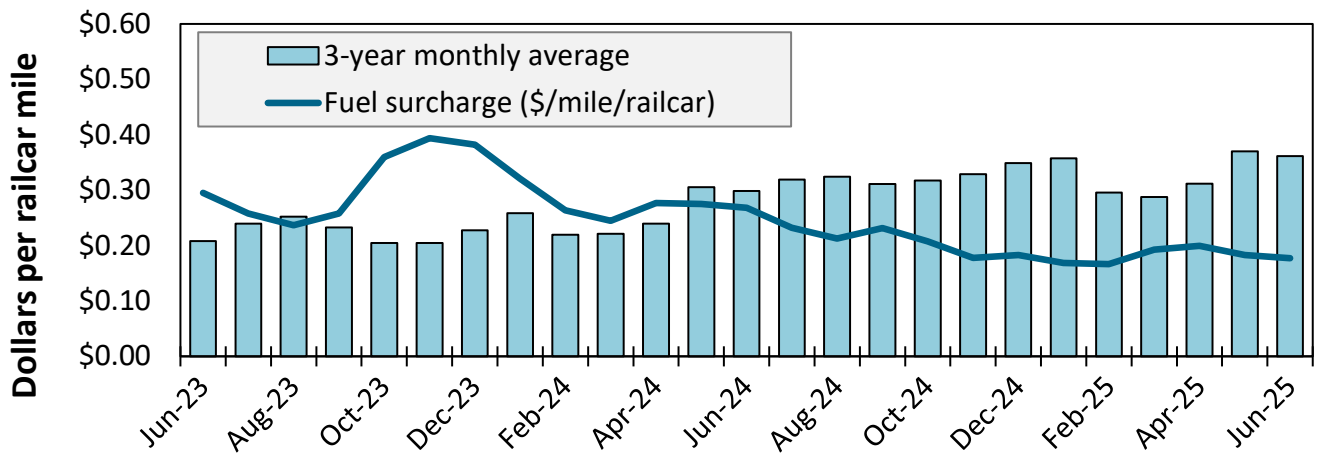
Source: BNSF, CN, CPKC, CSX, and UP.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, June 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	$4,663	$45.89	$1.17	-0.3	3.5
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,346	$52.62	$1.34	-0.2	-
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,466	$53.80	$1.37	-0.2	-
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,672	$45.98	$1.17	-0.3	3.2
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,068	$49.88	$1.27	0.0	3.4
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,203	$51.21	$1.30	0.0	3.2
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,081	$50.01	$1.27	-0.2	3.9
	Delhi, LA	Laredo, TX	CPKC	Non-shuttle	$3,946	$38.84	$0.99	-0.2	-
	Slater, MO	Laredo, TX	CPKC	Non-shuttle	$5,329	$52.45	$1.33	-0.2	-
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,346	$52.62	$1.43	-0.2	-
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,615	$65.11	$1.77	0.0	2.7
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,466	$53.80	$1.46	-0.2	-
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,717	$66.11	$1.80	0.0	2.5
	Corder, MO	Laredo, TX	CPKC	Non-shuttle	$5,319	$52.35	$1.42	-0.2	-
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$2,979	$29.32	$0.80	-25.2	-30.3
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,787	$27.43	$0.75	-21.8	-27.3
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,373	$43.04	$1.17	-8.9	-10.4
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,265	$41.98	$1.14	-7.0	-8.4
	Pratt, KS	Eagle Pass, TX	UP	Shuttle	$4,501	$44.30	$1.21	-4.3	-5.9

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).

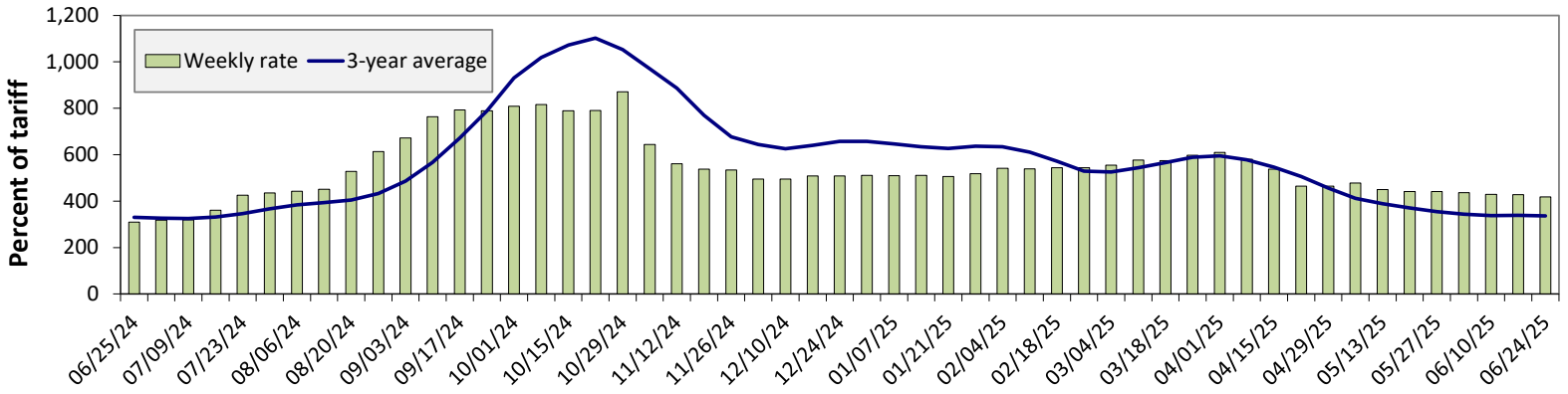
Figure 9. Railroad fuel surcharges, North American weighted average



June 2025: $0.18/mile, unchanged from last month’s surcharge of $0.18/mile; down 9 cents from the June 2024 surcharge of $0.27/mile; and down 18 cents from the June prior 3-year average of $0.36/mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.
Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending June 17: there is no change from the previous week; 35 percent higher than last year; and 26 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

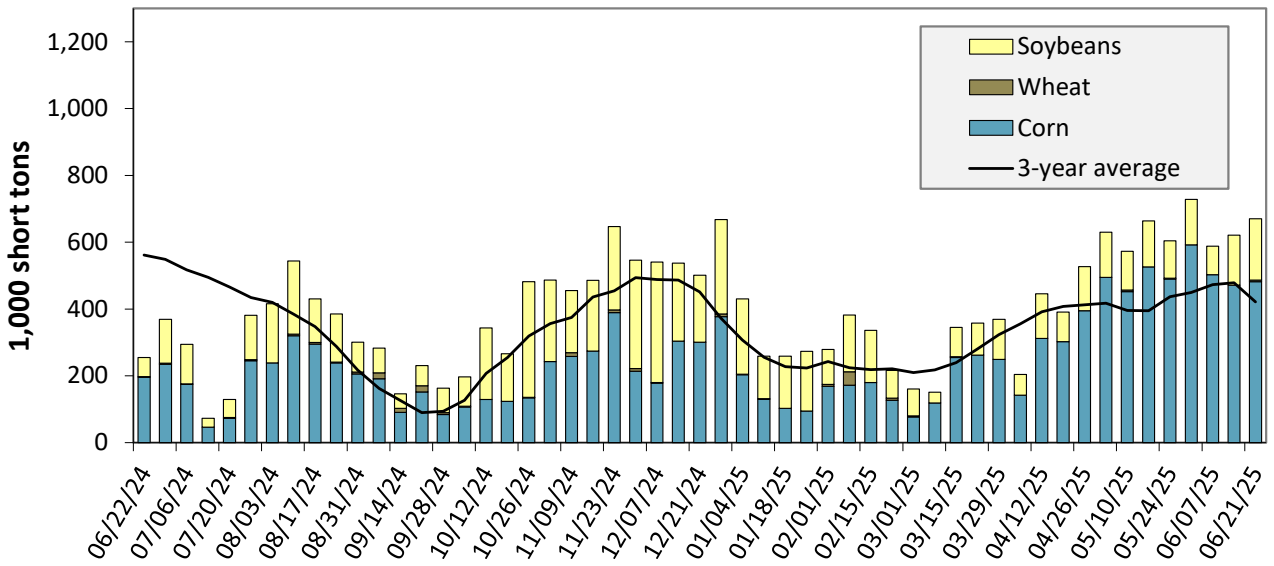
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	6/24/2025	556	463	418	334	324	281
	6/17/2025	534	465	428	314	326	282
$/ton	6/24/2025	34.42	24.63	19.40	13.33	15.20	8.82
	6/17/2025	33.05	24.74	19.86	12.53	15.29	8.85
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	45	35	35	56	32	39
	3-year avg.	29	25	24	27	4	10
Rate	July	538	454	412	333	326	294
	September	696	664	659	672	663	684

Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of $6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi assumes a base rate of $5.32 (Savanna, IL, to Keithsburg, IL). The per ton rate on the Illinois River assumes a base rate of $4.64 (Havana, IL, to Hardin, IL). The per ton rate at St. Louis assumes a base rate of $3.99 (Grafton, IL, to Cape Girardeau, MO). The per ton rate on the Ohio River assumes a base rate of $4.69 (Silver Grove, KY, to Madison, IN). The per ton rate at Memphis-Cairo assumes a base rate of $3.14 (West Memphis, AR, to Memphis, TN). For more on base rate values along the various segments of the Mississippi River System, see AgTransport.
Source: USDA, Agricultural Marketing Service.

Figure 11. Benchmark tariff rates

Source: USDA, Agricultural Marketing Service.

Figure 12. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



For the week ending June 21: 163 percent higher than last year and 59 percent higher than the 3-year average.

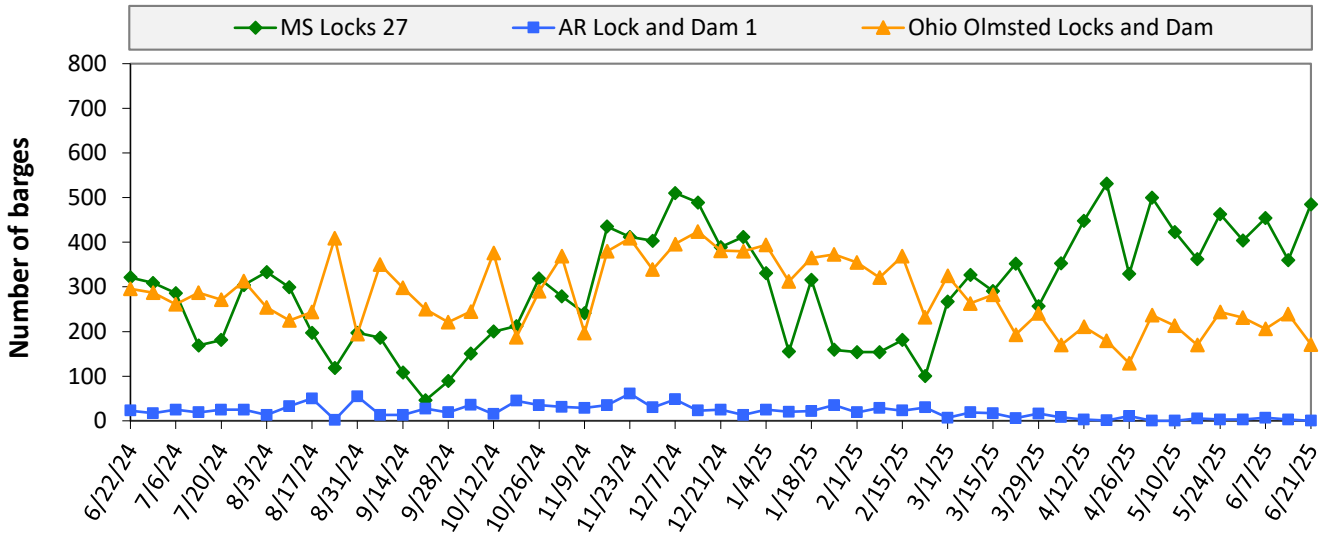
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 06/21/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	128	0	93	0	222
Mississippi River (Winfield, MO (L25))	310	0	139	0	448
Mississippi River (Alton, IL (L26))	465	5	185	0	654
Mississippi River (Granite City, IL (L27))	482	5	183	0	669
Illinois River (La Grange)	114	5	45	0	164
Ohio River (Olmsted)	32	9	30	4	75
Arkansas River (L1)	0	15	0	0	15
Weekly total - 2025	514	29	213	4	760
Weekly total - 2024	259	49	96	14	419
2025 YTD	10,071	501	5,062	108	15,743
2024 YTD	6,794	745	5,349	140	13,028
2025 as % of 2024 YTD	148	67	95	77	121
Last 4 weeks as % of 2024	197	95	111	26	160
Total 2024	15,251	1,564	12,598	214	29,626

Note: “Other” refers to oats, barley, sorghum, and rye. Total may not add up due to rounding. YTD = year to date. Weekly total, YTD, and calendar year total include Mississippi River lock 27, Ohio River Olmsted lock, and Arkansas Lock 1. “L” (as in "L15") refers to a lock, locks, or lock and dam facility.
Source: U.S. Army Corps of Engineers.

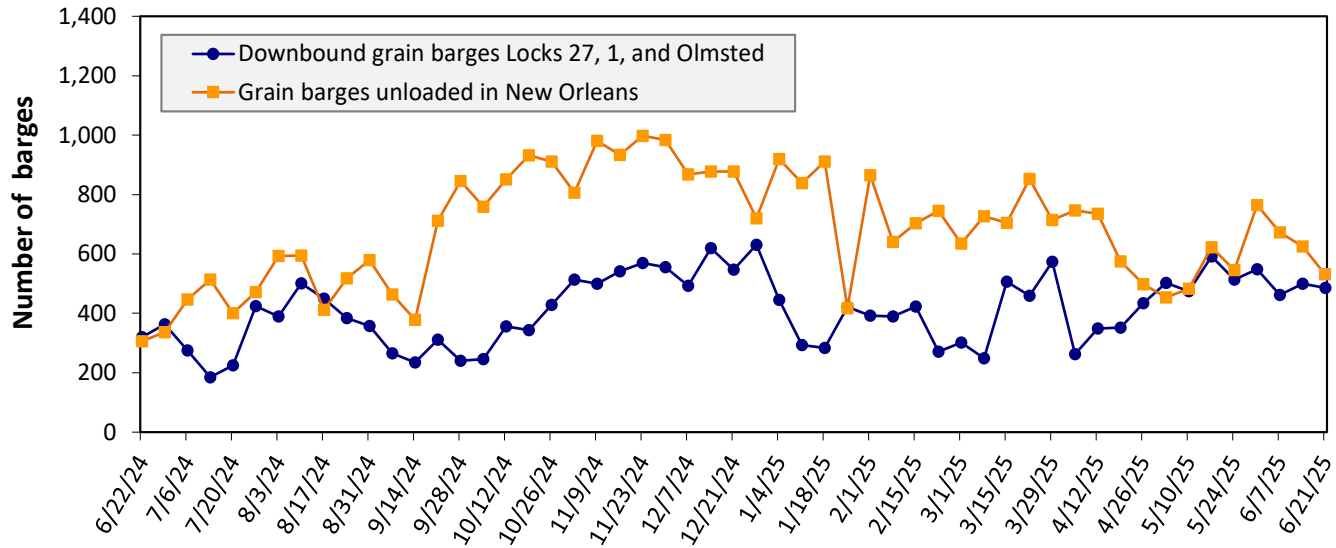
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending June 21: 656 barges transited the locks, 54 barges more than the previous week, and 35 percent higher than the 3-year average.

Source: U.S. Army Corps of Engineers.

Figure 14. Grain barges for export in New Orleans region



For the week ending June 21: 485 barges moved down river, 14 fewer than the previous week; 531 grain barges unloaded in the New Orleans Region, 15 percent fewer than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		June 2025	May 2025	June 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.63	$21.55	$21.15	2.3	4.5
	Central Ferry, WA/Almota, WA	$20.73	$20.65	$20.28	2.2	4.3
	Lyons Ferry, WA	$19.72	$19.64	$19.31	2.1	4.0
	Windust, WA/Lower Monumental, WA	$18.69	$18.61	$18.32	2.0	3.7
	Sheffler, WA	$18.66	$18.58	$18.29	2.0	3.7
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.46	$17.38	$17.14	1.9	3.2
	Port Kelly, WA/Wallula, WA	$17.24	$17.16	$16.93	1.8	3.1
	Umatilla, OR	$17.14	$17.06	$16.83	1.8	3.1
	Boardman, OR/Hogue Warner, OR	$16.88	$16.80	$16.58	1.8	3.0
	Arlington, OR/Roosevelt, WA	$16.72	$16.64	$16.43	1.8	2.9
	Biggs, OR	$15.39	$15.31	$15.15	1.6	2.4
	The Dalles, OR	$14.29	$14.21	$14.09	1.4	1.8

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

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

May, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	81	0	81
Columbia River (Bonneville Lock and Dam (L1))	99	0	99
Monthly total 2025	99	0	99
Monthly total 2024	425	0	425
2025 YTD	1,426	0	1,426
2024 YTD	1,064	0	1,064

Note: "Other" refers to corn, soybeans, oats, barley, and rye. Totals may not add up because of rounding. "Monthly total" refers to grain moving through Lock 1, headed for export.
YTD = year to date. "L" (as in "L1") refers to lock, locks, or lock and dam facility.
n/a = data not available.
Source: U.S. Army Corps of Engineers.

Figure 15. Dam and port locations on Columbia-Snake River

Source: USDA, Agricultural Marketing Service.

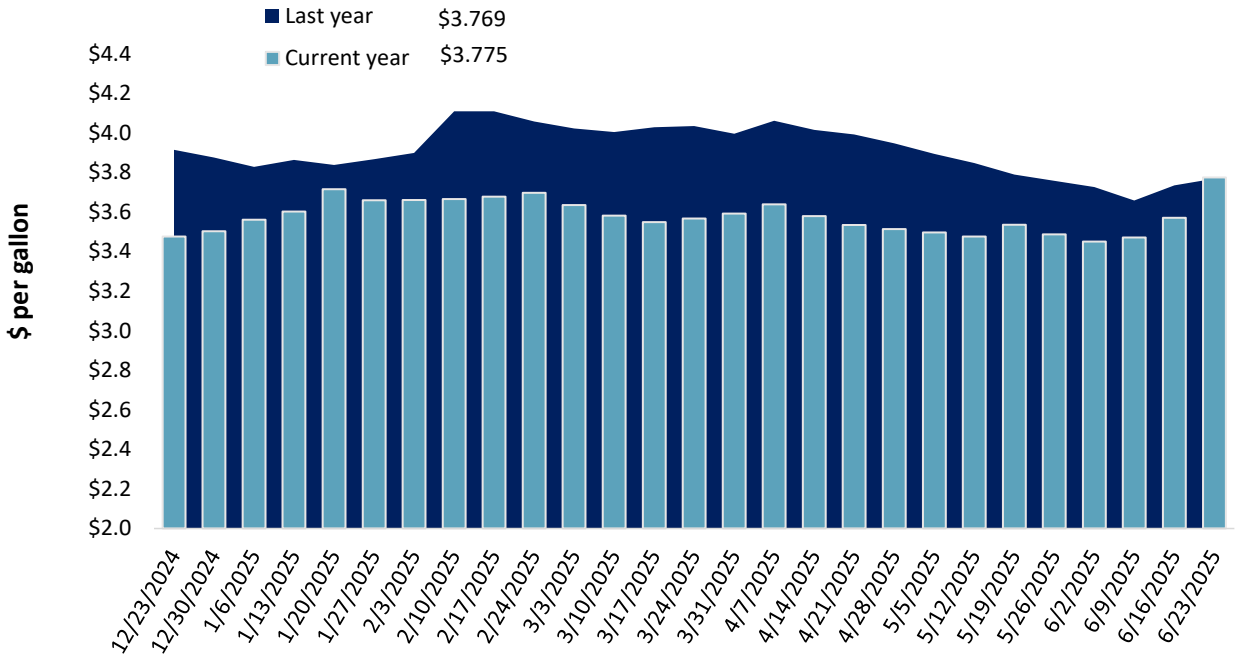
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 6/23/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.790	0.169	-0.086
	New England	3.967	0.072	-0.121
	Central Atlantic	3.919	0.137	-0.129
	Lower Atlantic	3.725	0.193	-0.065
II	Midwest	3.777	0.240	0.115
III	Gulf Coast	3.436	0.224	-0.070
IV	Rocky Mountain	3.689	0.141	-0.021
V	West Coast	4.458	0.148	0.038
	West Coast less California	4.082	0.180	0.092
	California	4.893	0.112	-0.020
Total	United States	3.775	0.204	0.006

Note: Diesel fuel prices include all taxes. Prices represent an average of all types of diesel fuel. On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
Source: U.S. Department of Energy, Energy Information Administration.

Figure 16. Weekly diesel fuel prices, U.S. average



For the week ending June 23, the U.S. average diesel fuel price increased 20.4 cents from the previous week to $3.775 per gallon, 0.6 cents above the same week last year.

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

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 6/12/2025	2,258	1,075	1,648	794	83	5,858	13,546	3,727	23,131
	This week year ago	1,165	831	1,639	1,048	109	4,792	10,727	3,800	19,320
	Last 4 wks. as % of same period 2023/24	110	69	54	44	48	68	138	101	113
Current shipped (cumulative) exports sales	2024/25 YTD	195	51	119	111	3	479	53,287	45,403	99,169
	2023/24 YTD	80	74	227	254	0	635	42,109	40,419	83,162
	YTD 2024/25 as % of 2023/24	242	70	53	44	0	75	127	112	119
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435

Note: The marketing year for wheat is June 1 to May 31 and, for corn and soybeans, September 1 to August 31. YTD = year-to-date; wks. = weeks.
Source: USDA, Foreign Agricultural Service.

Table 15. Top 5 importers of U.S. corn

For the week ending 6/12/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
Mexico	2,255	21,840	21,147	3	17,746
Japan	570	12,139	10,218	19	9,366
China	0	33	2,812	-99	8,233
Colombia	100	6,869	5,552	24	4,383
Korea	2	5,647	2,179	159	1,565
Top 5 importers	2,926	46,527	41,908	11	41,293
Total U.S. corn export sales	3,288	66,833	52,836	26	51,170
% of YTD current month's export projection	5%	99%	91%	-	-
Change from prior week	155	904	512	-	-
Top 5 importers' share of U.S. corn export sales	89%	70%	79%	-	81%
USDA forecast June 2025	67,949	67,314	58,220	16	-
Corn use for ethanol USDA forecast, June 2025	139,700	139,700	139,141	0	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (September 1 – August 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

Table 16. Top 5 importers of U.S. soybeans

For the week ending 6/12/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
China	0	22,479	24,235	-7	28,636
Mexico	293	4,999	4,724	6	4,917
Japan	86	1,931	2,038	-5	2,231
Egypt	0	3,060	1,297	136	2,228
Indonesia	3	1,802	1,999	-10	1,910
Top 5 importers	382	34,271	34,293	-0	39,922
Total U.S. soybean export sales	1,193	49,129	44,219	11	51,302
% of YTD current month's export projection	2%	98%	96%	-	-
Change from prior week	75	539	498	-	-
Top 5 importers' share of U.S. soybean export sales	32%	70%	78%	-	78%
USDA forecast, June 2025	49,396	50,349	46,130	9	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (September 1 – August 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

Table 17. Top 10 importers of all U.S. wheat

For the week ending 6/12/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25		
Mexico	1,164	943	23	3,358
Philippines	594	775	-23	2,473
Japan	512	439	17	2,045
China	0	68	-100	1,137
Korea	309	547	-43	1,674
Taiwan	299	231	29	935
Thailand	172	165	4	667
Nigeria	239	53	355	629
Indonesia	214	137	56	518
Colombia	228	80	185	489
Top 10 importers	3,731	3,437	9	13,926
Total U.S. wheat export sales	6,337	5,427	17	19,135
% of YTD current month's export projection	28%	24%	-	-
Change from prior week	427	590	-	-
Top 10 importers' share of U.S. wheat export sales	59%	63%	-	73%
USDA forecast, June 2025	22,453	22,317	1	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (June 1 – May 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

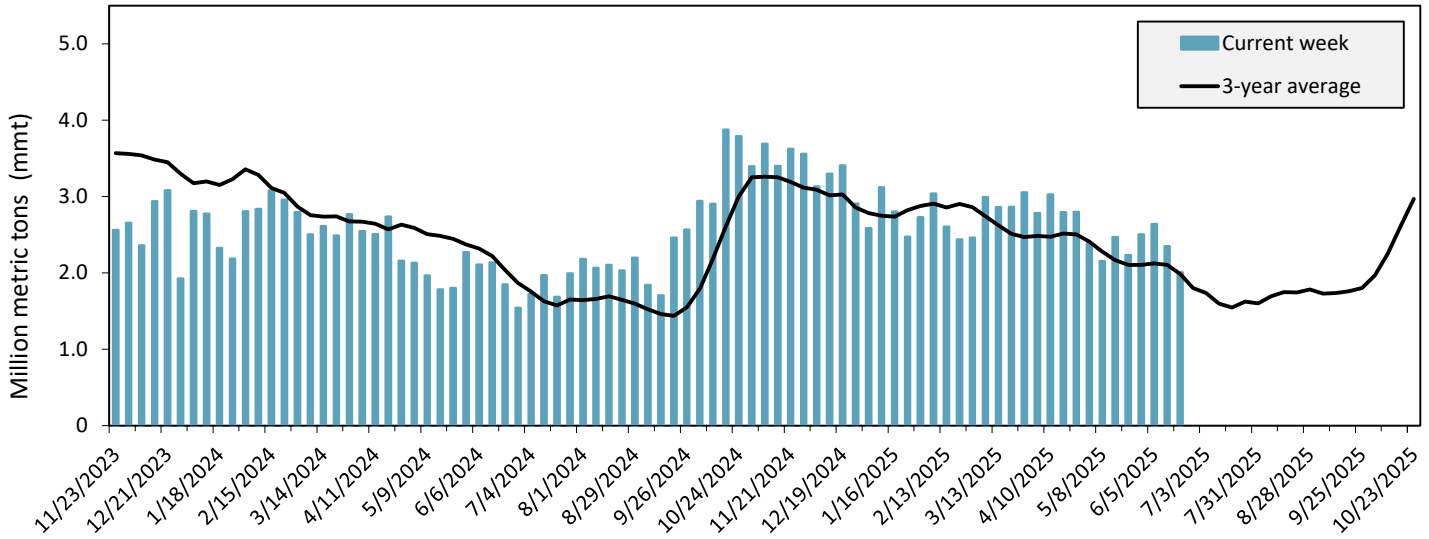
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 06/19/2025	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	408	457	89	12,278	9,321	132	112	141	13,987
	Soybeans	0	0	n/a	1,966	2,523	78	0	0	10,445
	Wheat	117	164	71	5,217	4,996	104	99	112	11,453
	All grain	525	621	85	19,556	17,924	109	101	118	37,186
Mississippi Gulf	Corn	744	935	80	18,411	12,744	144	137	132	27,407
	Soybeans	79	123	64	10,264	11,240	91	95	106	29,741
	Wheat	37	59	62	1,598	2,528	63	91	71	4,523
	All grain	860	1,117	77	30,273	26,567	114	124	123	61,789
Texas Gulf	Corn	11	0	n/a	158	255	62	145	109	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	82	126	66	1,781	738	241	283	209	1,940
	All grain	164	144	114	2,272	2,794	81	198	157	6,965
Interior	Corn	301	283	107	6,367	6,621	96	94	121	13,463
	Soybeans	111	99	112	3,154	3,437	92	103	111	8,059
	Wheat	18	40	46	1,371	1,392	98	60	83	2,952
	All grain	447	444	101	11,174	11,567	97	93	115	24,753
Great Lakes	Corn	0	21	0	21	0	n/a	n/a	162	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	0	0	n/a	104	165	63	27	37	653
	All grain	0	21	0	125	183	68	76	67	1,060
Atlantic	Corn	12	0	n/a	173	184	94	117	74	410
	Soybeans	3	2	184	455	432	105	175	17	1,272
	Wheat	0	0	n/a	34	11	305	n/a	n/a	73
	All grain	15	2	915	662	627	105	128	34	1,754
All Regions	Corn	1,477	1,696	87	37,408	29,126	128	120	132	56,109
	Soybeans	193	223	86	16,049	17,703	91	96	98	50,865
	Wheat	255	389	66	10,104	9,829	103	105	111	21,594
	All grain	2,010	2,348	86	64,166	59,717	107	112	120	133,979

*Note: Data include revisions from prior weeks; "All grain" includes corn, soybeans, wheat, sorghum, oats, barley, rye, sunflower, flaxseed, and mixed grains; "All regions" includes listed regions and other minor regions not listed; YTD= year-to-date; n/a = not available or no change. A "-" in the table indicates a percentage change with a near-zero denominator for the period.
Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2024, approximately 48 percent of the U.S. export grain shipments departed through the U.S. Gulf region and 27 percent departed through the PNW.

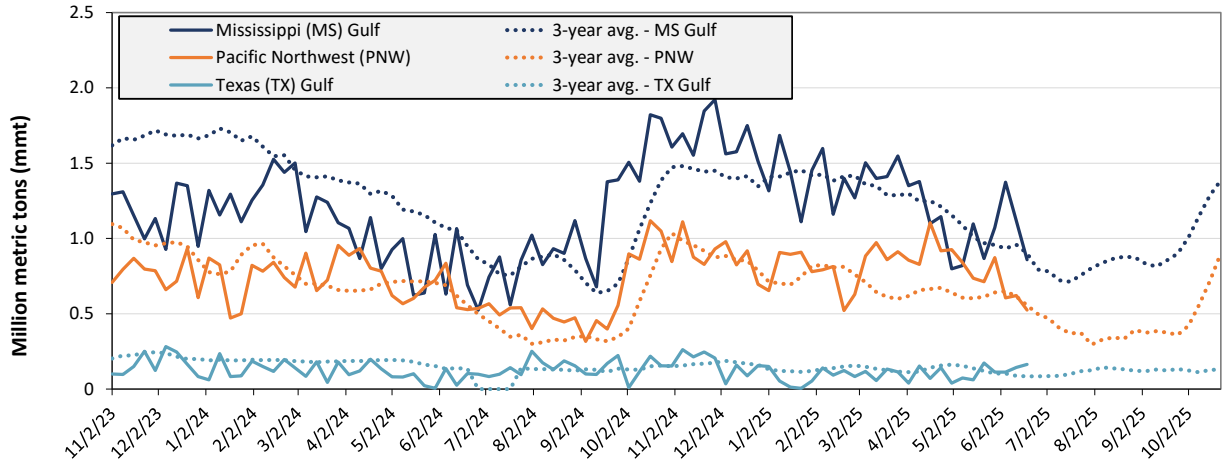
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jun. 19: 2 mmt of grain inspected, down 14 percent from the previous week, up 8 percent from the same week last year, and unchanged from the 3-year average.

Note: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 18. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 06/19/25 inspections (mmt):
MS Gulf: 0.86
PNW: 0.53
TX Gulf: 0.16

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 23	up 14	down 19	down 15
Last year (same 7 days)	up 13	up 57	up 18	up 7
3-year average (4-week moving average)	down 5	up 93	up 4	down 5

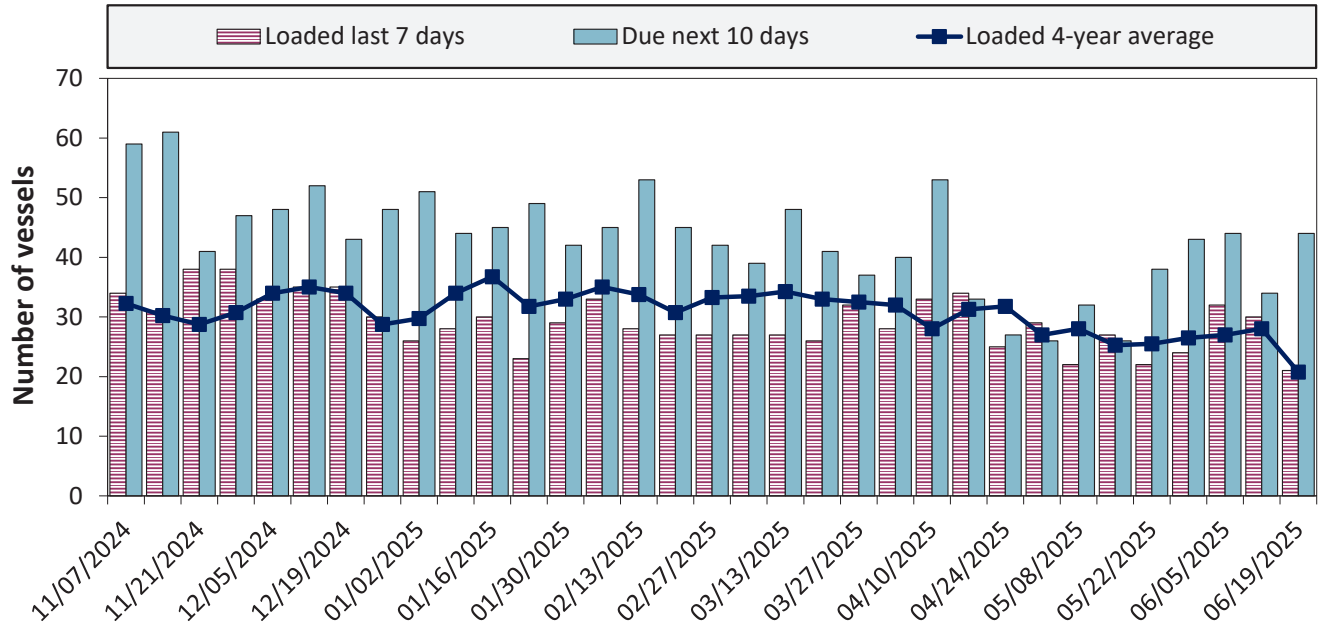
Source: USDA, Federal Grain Inspection Service.

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

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
6/19/2025	16	21	44	n/a
6/12/2025	18	30	34	8
2024 range	(11…45)	(18…38)	(29…61)	(3…25)
2024 average	28	28	45	13

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

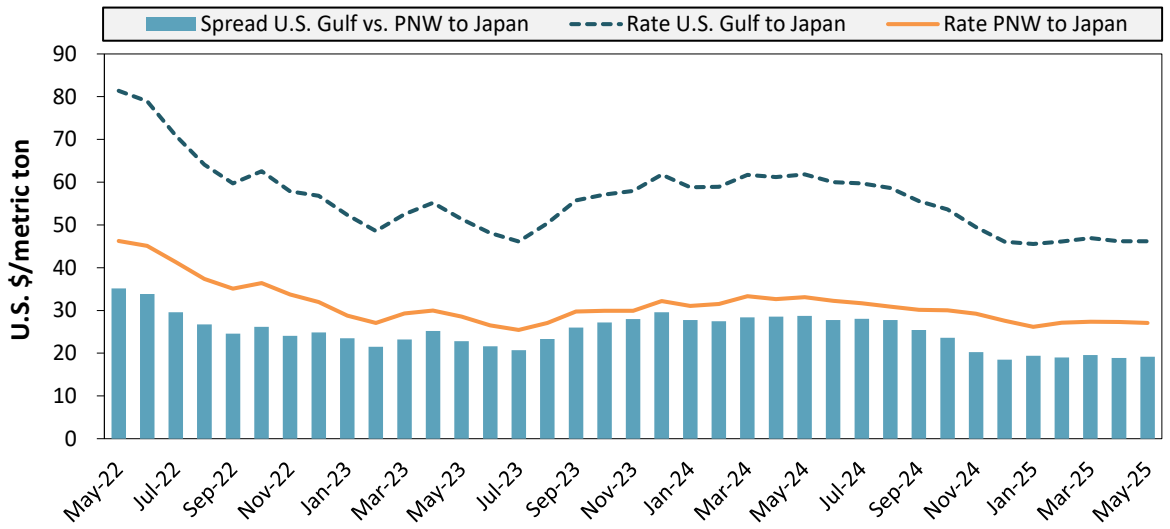
Figure 19. U.S. Gulf vessel loading activity



Week ending 06/19/25, number of vessels	Loaded	Due
Change from last year	17%	38%
Change from 4-year average	1%	42%

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
May 2025	$46.20	$27.05	$19.15
Change from May 2024	-25%	-18%	-33%
Change from 4-year average	-29%	-26%	-33%

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

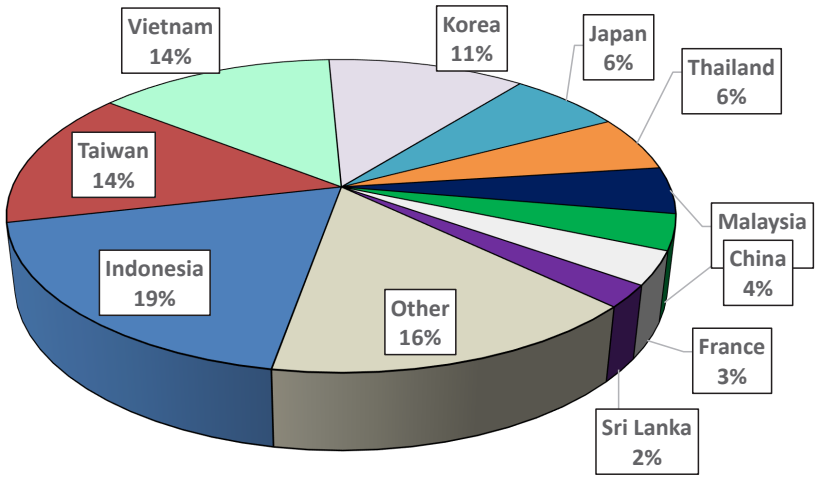
Table 20. Ocean freight rates for selected shipments, week ending 6/21/2025

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	Japan	Heavy grain	Mar 13, 2025	May 1/10, 2025	49,000	50.50
U.S. Gulf	Morocco	Soybeans	May 23, 2025	Jun 5/15, 2025	46,000	42.38
PNW	Japan	Corn	Apr 22, 2025	Jun 1/10, 2025	65,000	34.75
PNW	Japan	Corn	Apr 8, 2025	May 1/10, 2025	60,000	36.85
PNW	Taiwan	Wheat	Mar 28, 2025	May 1/10, 2025	50,000	39.75
PNW	S. Korea	Heavy grain	Feb 28, 2025	Apr 5/May 5, 2025	65,000	28.00
PNW	Japan	Wheat & Corn	Feb 25, 2025	Mar 1/20, 2025	35,000	32.85
EC S. America	China	Heavy grain	May 16, 2025	Jun 12/22, 2025	80,000	33.40
NC S. America	China	Heavy grain	May 6, 2025	May 20/31, 2025	66,000	35.50
Brazil	China	Heavy grain	Jun 5, 2025	Jun 25/30, 2025	63,000	37.50
Brazil	China	Heavy grain	Jun 5, 2025	Jun 21/30, 2025	63,000	34.25
Brazil	S. Korea	Corn	May 21, 2025	May 24, 2025	66,000	36.85
Brazil	N. China	Grain	May 9, 2025	Jun 1/7, 2025	64,000	36.50
Brazil	China	Heavy grain	May 7, 2025	Jun 20/Jul 20, 2025	63,000	32.75
Brazil	China	Soybeans	Apr 30, 2025	May 24/30, 2025	63,000	37.25
Brazil	China	Heavy grain	May 1, 2025	May 24/31, 2025	68,000	35.25
Brazil	N. China	Heavy grain	Apr 30, 2025	May 20/31, 2025	66,000	35.50
Brazil	China	Heavy grain	Mar 13, 2025	May 1/31, 2025	63,000	35.00

Note: 50 percent of food aid from the United States is required to be shipped on U.S.-flag vessels. Rates shown are per metric ton (1 metric ton = 2,204.62 pounds), free on board (F.O.B), except where otherwise indicated. op = option
Source: Maritime Research, Inc.

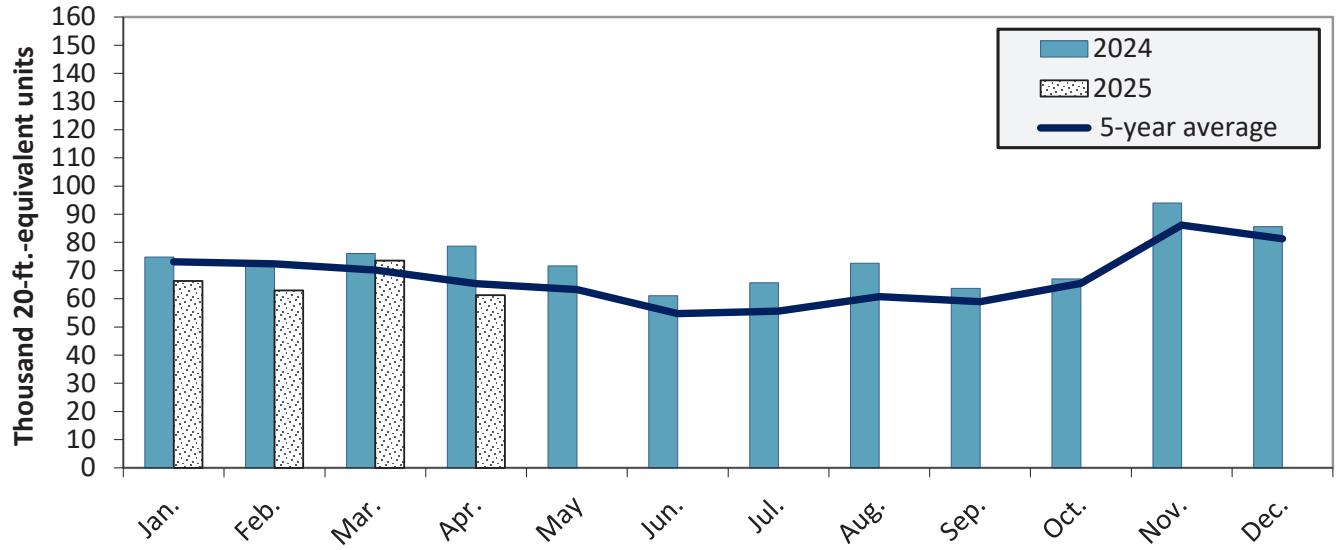
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2025



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

Figure 22. Monthly shipments of U.S. containerized grain exports



Containerized grain shipments in Apr. 2025 were down 22.1 percent from last year and down 6.1 percent from the 5-year average.

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

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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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