



Grain Transportation Report

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STB Allows CPKC's Shipments of ND Spring Wheat to Texas Gulf.

In a [decision](#) issued on July 7, the Surface Transportation Board (STB) confirmed that Canadian Pacific Kansas City (CPKC) can use haulage rights—originally granted to Kansas City Southern Railway (KCS)—over Union Pacific Railroad (UP) tracks to access the Port of Houston, TX. The rights apply to grain shipments of any origin on CPKC's network, including its legacy Canadian Pacific Railway network in the Northern Plains.

Because of STB's decision, spring wheat shippers served by CPKC in North Dakota have direct access to export terminals in the Texas Gulf. STB's Chair [commented](#) that the decision “preserves routing options for agricultural shippers, helping support a strong supply chain and market access for American exports.” For additional background on this proceeding, see [GTR, June 26, 2025](#).

Federal Court Vacates STB's Reciprocal Switching Rule.

On July 8, the U.S. Court of Appeals for the Seventh Circuit (Seventh Circuit) [vacated](#) the Surface Transportation Board's (STB) final rule that had established reciprocal switching for inadequate service.

STB finalized the reciprocal switching rule last year ([GTR, May 2, 2024, first highlight](#)), but several railroads challenged the rule with the Seventh Circuit. In its July 8 decision, the Seventh Circuit concluded that last year's rule violated congressionally established statutory standards that authorized reciprocal switching under the Staggers Act of 1980.

Under reciprocal switching, railcars originated by one rail carrier are transferred to a competing carrier at an interchange point. STB's rule on reciprocal switching for inadequate service had allowed shippers to petition STB for a reciprocal switching order when the incumbent railroad failed to meet one of three performance standards. No petitions were brought under STB's rule on reciprocal switching, which was in [effect from September 4, 2024](#) until July 8.

Vessel Sustains Attack in Red Sea After Unloading U.S. Grain.

From July 7 to 8, Houthi militants in Yemen [launched a drone and speedboat attack](#) on the Liberian-flagged and Greek-operated bulk carrier Eternity C as it transited the Red Sea. According to [USDA's Federal Grain Inspection Service](#), on May 31, the vessel had departed Houston, TX, with 13,900 metric tons of grain sorghum (likely, for food aid) destined to Somalia. The attack occurred just after Eternity C had unloaded in Somalia. Several crew members were killed or seriously injured in the attack, and the vessel later sank.

The attack on Eternity C occurred just 1 day after a Houthi attack on another dry bulk vessel—[Magic Seas](#), which also sank. The July incidents were the first attacks on merchant shipping in the Red Sea [since November 2024](#). According to the Financial Times, the cost of insuring vessels transiting the Red Sea has “surged” since the most recent attacks.

New UP Kansas City Intermodal Terminal To Open Mid-July.

Union Pacific Railroad (UP) [recently announced](#) its new intermodal terminal in Kansas City, KS, will open July 15. The [new location](#) offers 30 percent more lift capacity than the [current terminal](#) it replaces (roughly 10 miles away). The new terminal also [features](#) ready highway access, stacked container operations, two parking lots, additional rail track, widened roads, and automated gates. The new terminal will serve domestic and international containerized grain shipments.

UP detailed the operational transition as follows: all ingates at the current facility will close on July 14. At 7 pm CT, they will close for shipments to Northern California; Salt Lake City, UT; and the Pacific Northwest. At 9 pm CT, they will close for shipments to Southern California. Beginning July 7 for PNW origins and July 10 for all others, waybills should reference the new facility. All equipment (boxes and chassis) must be removed from the current facility by 4 pm CT July 21.

The new ramp is UP's [fourth in recent years](#), along with one in Phoenix, AZ; Minneapolis, MN; and the Inland Empire in Southern California.

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 26, [unshipped balances](#) of corn and soybeans totaled 15.96 million metric tons (mmt), down 4 percent from last week and up 21 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 5.89 mmt, up 1 percent from last week and up 5 percent from the same time last year.

Net [corn export sales](#) for MY 2024/25 were 0.53 mmt, down 28 percent from last week. Net [soybean export sales](#) were 0.46 mmt, up 15 percent from last week. Net [wheat export sales](#) for MY 2025/26 were 0.59 mmt, up 130 percent from last week.

Rail

U.S. Class I railroads originated 25,327 [grain carloads](#) during the week ending June 28. This was a 2-percent decrease from the previous week, 19 percent more than last year, and 19 percent more than the 3-year average.

Average July [shuttle secondary railcar bids/offers](#) (per car) were \$68 above tariff for the week ending July 3. This was \$114 more than last week and \$436 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$13 below tariff. This was \$29 less than last week and \$188 lower than this week last year.

Barge

For the week ending July 5, [barged grain movements](#) totaled 780,800 tons. This was 35 percent more than the previous week and 78 percent more than the same period last year.

For the week ending July 5, 525 grain barges [moved down river](#)—169 more than last week. There were 560 grain barges [unloaded](#) in the New Orleans region, unchanged from last week.

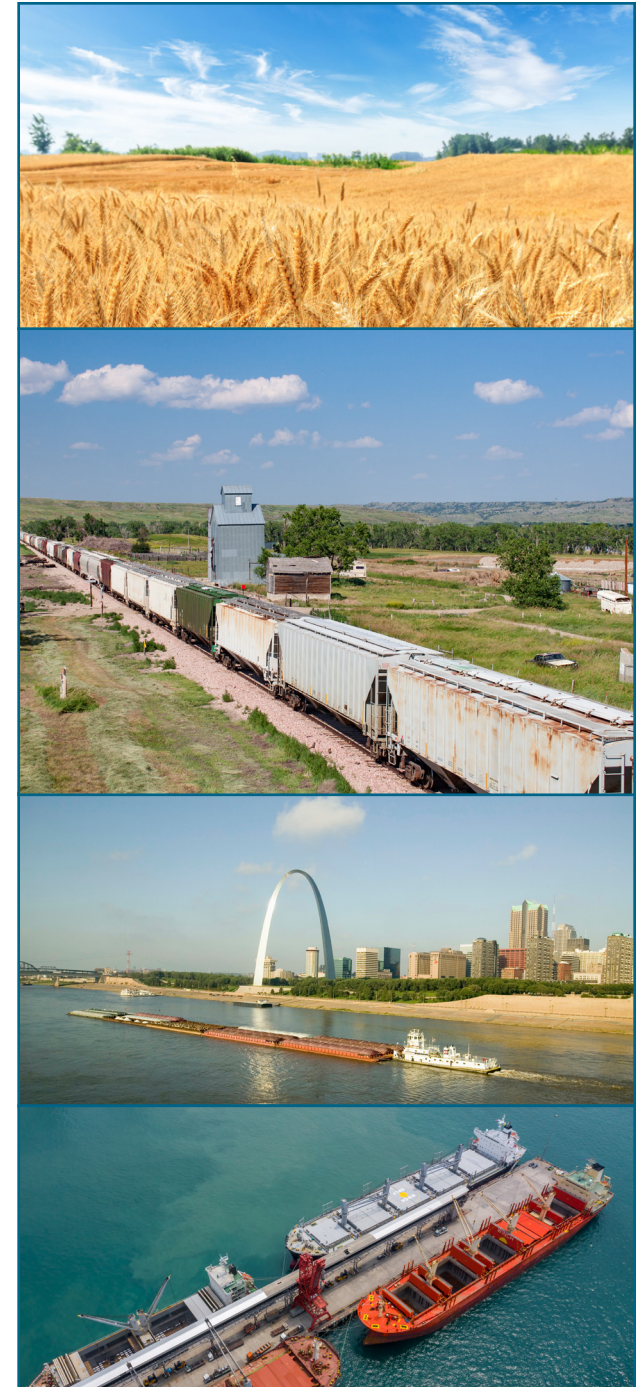
Ocean

For the week ending July 3, 26 [oceangoing grain vessels](#) were loaded in the Gulf—30 percent more than the same period last year. Within the next 10 days (starting July 4), 37 vessels were expected to be loaded—8 percent less than the same period last year.

As of July 3, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$48.25, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$28.00 per mt, up 3 percent from the previous week.

Fuel

For the week ending July 7, the [U.S. average diesel fuel price](#) increased 1.2 cents from the previous week to \$3.739 per gallon, 12.6 cents below the same week last year.



Upcoming 2025 Events

| Date | Event | Location | Website |
|--------------|---|------------------|---|
| Jul 27-29 | AAEA and WAEA Joint Annual Meeting: This joint meeting between the Agricultural & Applied Economics Association (AAEA) and the Western Agricultural Economics Association will spotlight the latest economic research on a broad range of issues in agriculture, international and rural development, resources and the environment, and more. One of the invited-paper sessions is titled "New Perspectives on Supply Chain Resilience." | Denver, CO | https://www.aaea.org/meetings/2025-aaea-annual-meeting |
| Aug 18-20 | STB National Grain Car Council Meeting and TEGMA 2025 Fall Symposium: The annual meeting of the Surface Transportation Board's (STB) National Grain Car Council (NGCC) is held jointly with the Transportation, Elevator, and Grain Merchants Association's (TEGMA) Fall Symposium. Representing Class I and short line railroads, grain companies, and grain car owners/manufacturers, NGCC informs STB members on grain transportation issues. | Kansas City, MO | https://www.tegma.org/fall |
| Aug 20-22 | American Coalition for Ethanol (ACE) Annual Conference: ACE's 38th annual conference convenes agricultural producers, commodity and farm organizations, ethanol producers, rural electric cooperatives, and other businesses. Agenda will be posted to the website. (ACE is still in the process of reviewing speaker abstracts.) | Sioux Falls, SD | https://ethanol.org/events/conference |
| Sep 8-11 | FTR Transportation Conference: Each day of the 2025 FTR Transportation Conference features presentations and panels on a different specific aspect of either trucking or rail transportation, as follows: truck equipment, truck freight, rail equipment, and rail freight. | Indianapolis, IN | https://www.ftrconference.com/ |
| Sep 24-26 | Association of Ship Brokers and Agents (ASBA) Annual Cargo Conference: Topics explored at ASBA's Annual Cargo Conference include general bulk cargo shipments, such as grain, steel, iron ore, cement, and other minor bulk commodities. ASBA members include ship brokers, agents, and affiliates. | Miami Beach, FL | https://www.asba.org/annual-cargo-conference |
| Sep 29-Oct 1 | Journal of Commerce (JOC) Inland Distribution Conference: JOC's Inland Distribution Conference includes shippers, carriers, third-party logistics companies and brokers, and technology providers. A range of timely topics will be discussed, including outlooks for the economy, cargo theft, workforce development, trucking and intermodal markets, and technology. | Chicago, IL | https://inland.joc.com/en |
| Sep 30-Oct 3 | Inland Rivers Ports and Terminals (IRPT) 2025 Conference: With exhibits and education sessions, the IRPT 2025 Conference focuses on the river transportation and infrastructure sectors. IRPT members include port professionals, terminal operators, shippers, carriers, suppliers, and State agencies. | Milwaukee, WI | https://www.irpt.net/conference-2025/ |
| Oct 9-12 | North American Millers' Association (NAMA) Annual Meeting: The 3-day program offers executive-level networking, education sessions on timely topics, and meetings of NAMA's Wheat, Corn, Oat, and Associate Divisions and Board of Directors. NAMA represents U.S. and Canadian millers of wheat, corn, oats, and rye. | San Antonio, TX | https://namamillers.org/event/2025-annual-meeting/ |
| Oct 19-22 | Global Ethanol Summit (GES) 2025: GES 2025 gathers more than 450 senior-level government officials and senior industry leaders from around the world to promote the benefits of expanded global ethanol use. The event also fosters collaboration with ethanol producers, industry leaders, refiners, and a broad array of stakeholders. | Washington, DC | https://grains.org/event/october-19-22-2025-global-ethanol-summit/ |
| Oct 25-28 | American Trucking Associations' (ATA) Management Conference and Exhibition: ATA's annual conference attracts thousands of trucking's top decision makers for policy discussions, educational sessions, interactive exhibits, and networking opportunities. The conference explores the trucking industry's evolving challenges to help chart a course for the future. | San Diego, CA | https://mce.trucking.org/ |
| Dec 7-9 | National Grain and Feed Association's (NGFA) Country Elevator Conference: NGFA's Country Elevator Conference and Trade Show convene grain industry professionals to discuss the economic outlook for agriculture in 2025 and how Washington, international trade, and current events will impact the grain and feed industry. In previous years, CEC has included panels on grain transportation—particularly related to rail. | Indianapolis, IN | https://www.ngfa.org/event/cec-2025/ |

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.

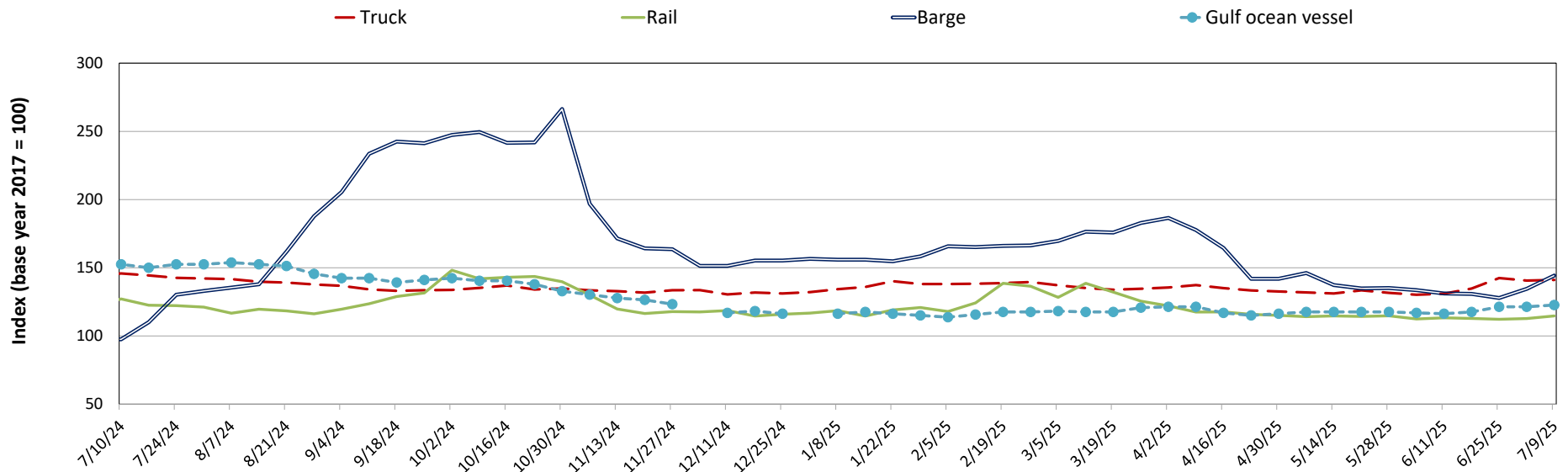
Table 1. Grain transport cost indicators

| For the week ending: | Truck | Rail | Barge | Ocean | |
|----------------------|-------|------|-------|-------|---------|
| | | | | Gulf | Pacific |
| 07/09/25 | 141 | 115 | 144 | 123 | 133 |
| 07/02/25 | 141 | 113 | 135 | 121 | 129 |
| 07/10/24 | 146 | 127 | 98 | 153 | 151 |

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.

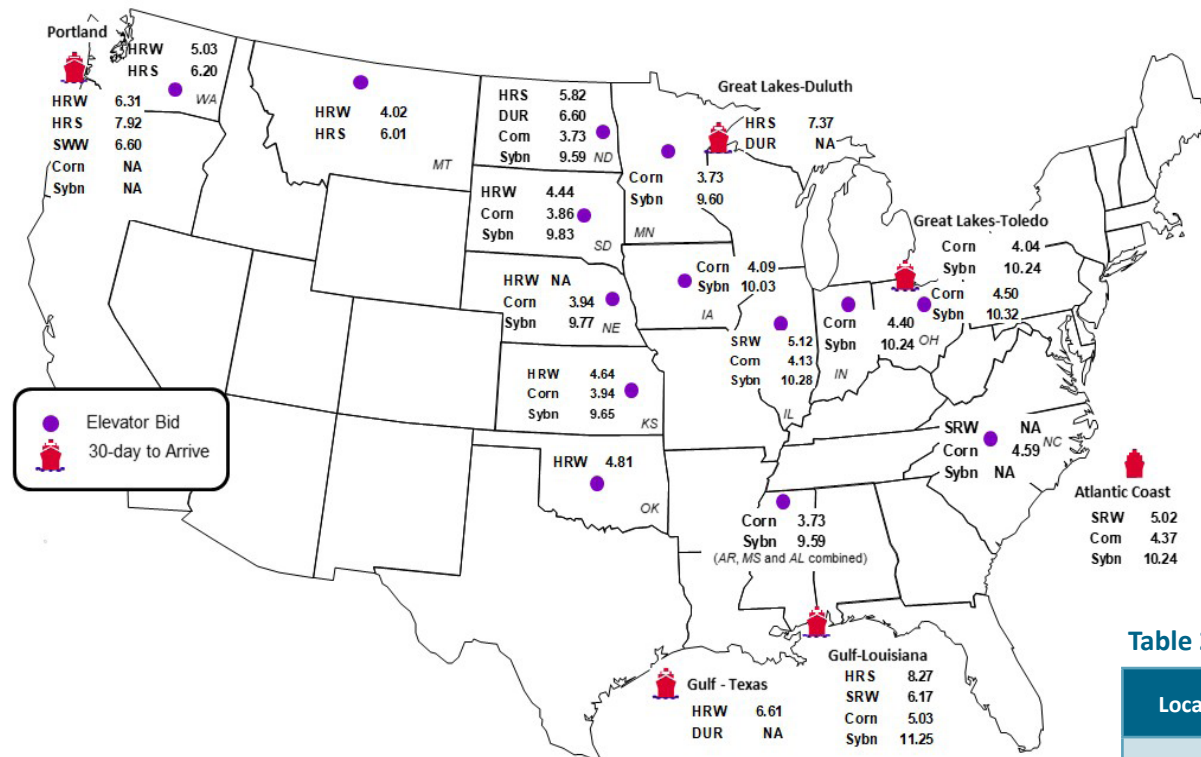
Figure 1. Grain transportation cost indicators as of week ending 7/9/25



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 | 7/4/2025 | 6/27/2025 |
|-----------|--------------------|----------|-----------|
| Corn | IL-Gulf | -0.90 | -0.86 |
| Corn | NE-Gulf | -1.09 | -1.01 |
| Soybean | IA-Gulf | -1.22 | -1.08 |
| HRW | KS-Gulf | -1.97 | -1.85 |
| HRS | ND-Portland | -2.10 | -1.91 |

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 | 7/3/2025 | Week ago 6/27/2025 | Year ago 7/5/2024 |
|-------------|---------|-------|----------|-----------------------|----------------------|
| Kansas City | Wheat | Sep | 5.358 | 5.336 | 5.844 |
| Minneapolis | Wheat | Sep | 6.473 | 6.280 | 6.332 |
| Chicago | Wheat | Sep | 5.566 | 5.406 | 5.784 |
| Chicago | Corn | Sep | 4.368 | 4.270 | 4.172 |
| Chicago | Soybean | Sep | 10.49 | 10.248 | 11.104 |

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.

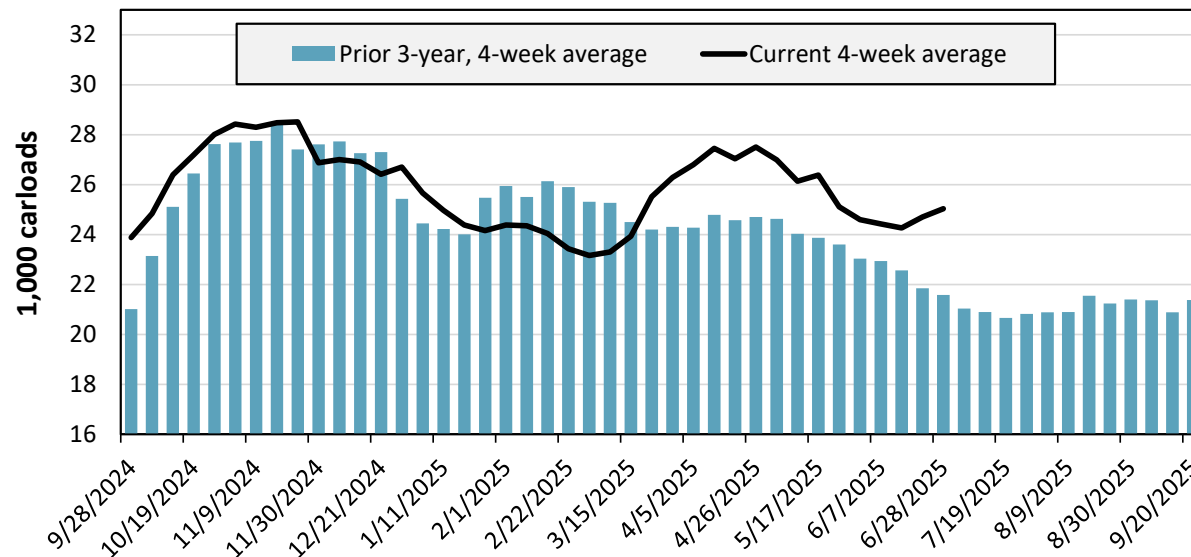
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

| For the week ending: 6/28/2025 | East | | West | | Central U.S. | | U.S. total |
|-----------------------------------|--------|---------|---------|---------|--------------|--------|------------|
| | CSXT | NS | BNSF | UP | CPKC | CN | |
| This week | 1,680 | 2,499 | 11,561 | 5,240 | 3,219 | 1,128 | 25,327 |
| This week last year | 1,363 | 2,520 | 9,312 | 4,773 | 2,603 | 714 | 21,285 |
| 2025 YTD | 42,267 | 73,491 | 284,080 | 148,872 | 69,809 | 35,854 | 654,373 |
| 2024 YTD | 42,520 | 68,727 | 273,891 | 134,066 | 71,822 | 23,615 | 614,641 |
| 2025 YTD as % of 2024 YTD | 99 | 107 | 104 | 111 | 97 | 152 | 106 |
| Last 4 weeks as % of 2024 | 99 | 96 | 114 | 120 | 127 | 197 | 116 |
| Last 4 weeks as % of 3-yr. avg. | 90 | 94 | 120 | 114 | 147 | 125 | 116 |
| 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 28, grain carloads were up 1 percent from the previous week, up 16 percent from last year, and up 16 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: 6/27/2025 | | East | | West | | Central U.S. | | U.S. Average |
|---|-----------------------------------|------|------|------|------|--------------|------|--------------|
| | | CSX | NS | BNSF | UP | CN | CPKC | |
| Average grain unit train origin dwell times (hours) | This week | 22.0 | 34.7 | 20.1 | 21.3 | 14.3 | 29.9 | 23.7 |
| | Average over last 4 weeks | 18.2 | 33.5 | 17.1 | 19.0 | 8.9 | 18.4 | 19.2 |
| | Average of same 4 weeks last year | 23.9 | 31.9 | 16.2 | 18.1 | 6.5 | n/a | 19.3 |
| Average grain unit train speeds (miles per hour) | This week | 21.5 | 18.0 | 24.5 | 22.2 | 19.4 | 16.6 | 20.4 |
| | Average over last 4 weeks | 21.9 | 18.5 | 24.8 | 22.5 | 23.8 | 16.8 | 21.4 |
| | Average of same 4 weeks last year | 23.1 | 18.8 | 24.7 | 22.7 | 25.0 | n/a | 22.9 |

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

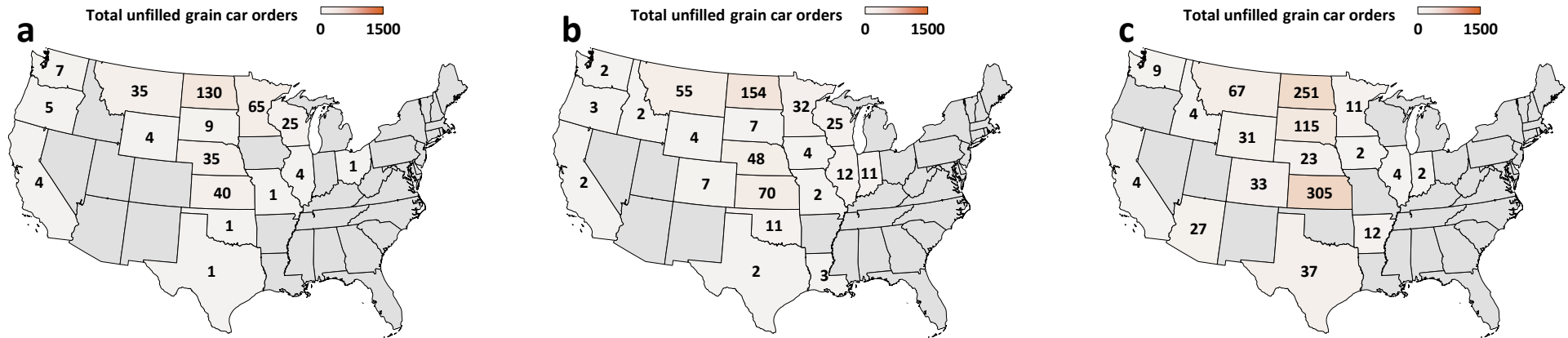
| For the week ending: 6/27/2025 | | East | | West | | Central U.S. | | U.S. Total |
|--|-----------------------------------|------|-----|------|-----|--------------|------|------------|
| | | CSX | NS | BNSF | UP | CN | CPKC | |
| Average number of empty grain cars not moved in over 48 hours | This week | 61 | 6 | 296 | 78 | 4 | 369 | 814 |
| | Average over last 4 weeks | 25 | 6 | 238 | 89 | 8 | 279 | 645 |
| | Average of same 4 weeks last year | 8 | 10 | 476 | 95 | 4 | n/a | 593 |
| Average number of loaded grain cars not moved in over 48 hours | This week | 29 | 208 | 349 | 88 | 7 | 475 | 1,157 |
| | Average over last 4 weeks | 18 | 182 | 278 | 68 | 10 | 421 | 976 |
| | Average of same 4 weeks last year | 45 | 241 | 839 | 151 | 9 | n/a | 1,284 |
| Average number of grain unit trains held | This week | 1 | 0 | 2 | 5 | 1 | 6 | 15 |
| | Average over last 4 weeks | 0 | 1 | 3 | 4 | 0 | 6 | 14 |
| | Average of same 4 weeks last year | 1 | 3 | 15 | 9 | 0 | n/a | 27 |
| Total unfilled manifest grain car orders | This week | 1 | 1 | 227 | 35 | 0 | 103 | 367 |
| | Average over last 4 weeks | 12 | 2 | 254 | 99 | 0 | 138 | 504 |
| | Average of same 4 weeks last year | 2 | 2 | 528 | 398 | 0 | n/a | 929 |

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](#).

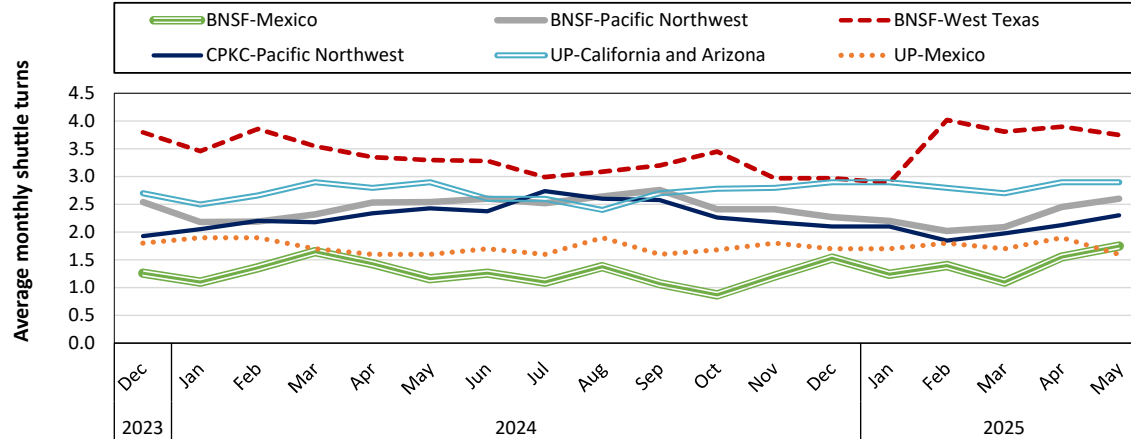
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 6/27/2025 (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

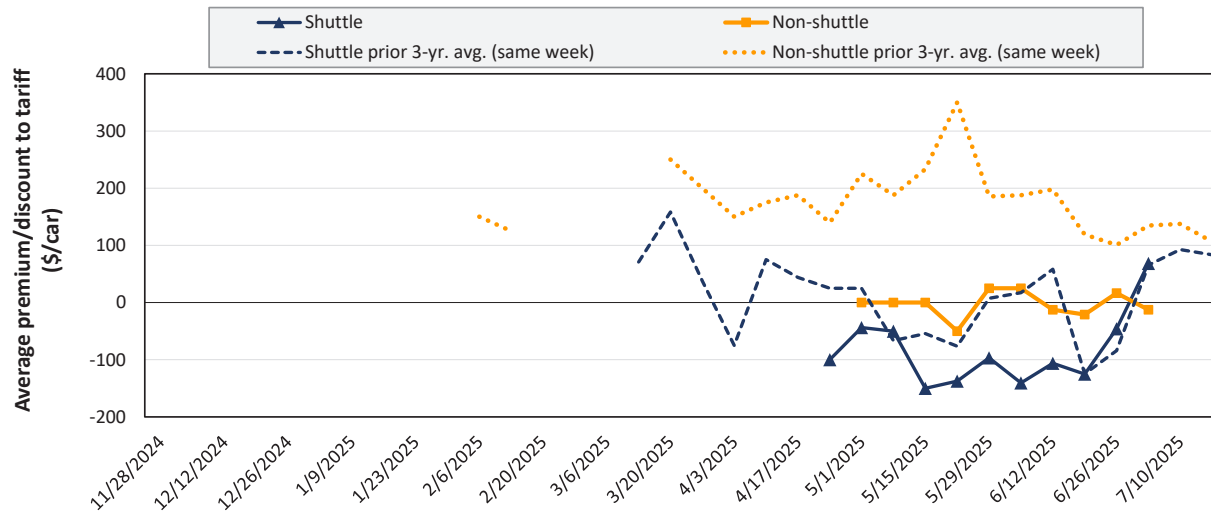


In May 2025, BNSF Railway's average monthly grain shuttle turns were 1.8 to Mexico, 2.6 to the Pacific Northwest, and 3.8 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.6 to 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](https://www.agtransport.org/). 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 July 2025



Average non-shuttle bids/offers fell \$29 this week, and are \$38 below the peak.

Average shuttle bids/offers rose \$114 this week and are at the peak.

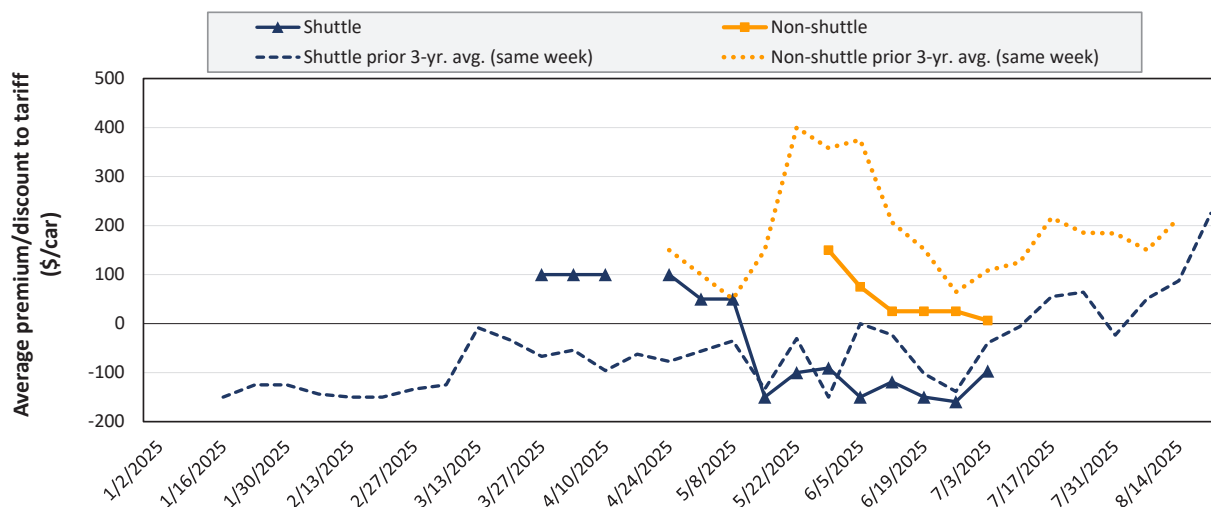
| 7/3/2025 | BNSF | UP |
|-------------|-------|-------|
| Non-Shuttle | \$25 | -\$50 |
| Shuttle | \$170 | -\$33 |

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 August 2025



Average non-shuttle bids/offers fell \$19 this week, and are \$144 below the peak.

Average shuttle bids/offers rose \$63 this week and are \$197 below the peak.

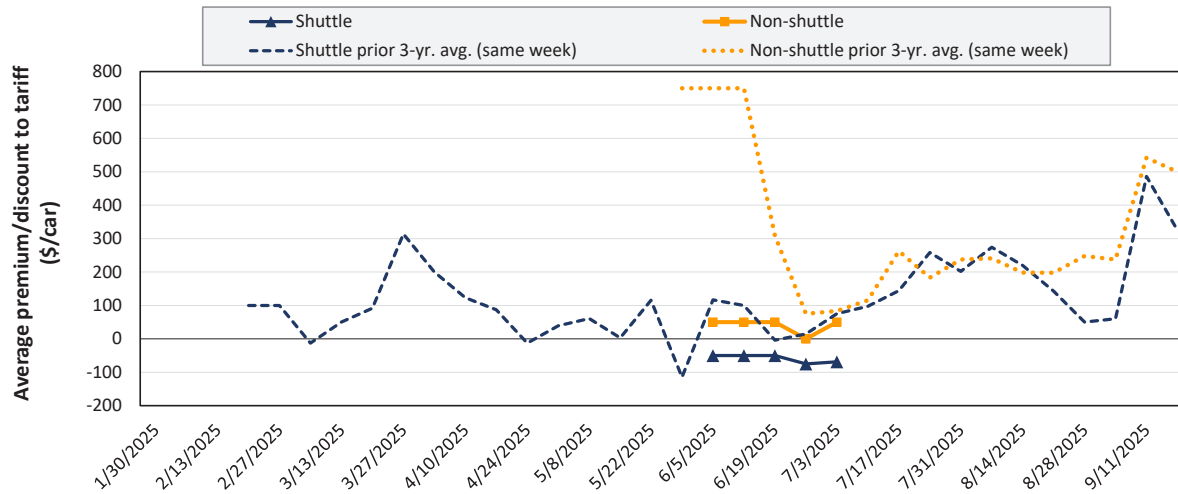
| 7/3/2025 | BNSF | UP |
|-------------|------|--------|
| Non-Shuttle | \$63 | -\$50 |
| Shuttle | \$6 | -\$200 |

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 September 2025



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

Average shuttle bids/offers rose \$6 this week and are \$19 below the peak.

| | 7/3/2025 | BNSF | UP |
|-------------|----------|-------|--------|
| Non-Shuttle | | \$100 | \$0 |
| Shuttle | | -\$38 | -\$100 |

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: 7/3/2025 | | Delivery period | | | | | |
|----------------------------------|----------------------------|-----------------|--------|--------|--------|--------|--------|
| | | Jul-25 | Aug-25 | Sep-25 | Oct-25 | Nov-25 | Dec-25 |
| Non-shuttle | BNSF | 25 | 63 | 100 | n/a | n/a | n/a |
| | Change from last week | -58 | -38 | n/a | n/a | n/a | n/a |
| | Change from same week 2024 | -125 | -88 | -50 | n/a | n/a | n/a |
| | UP | -50 | -50 | 0 | n/a | n/a | n/a |
| | Change from last week | 0 | 0 | 0 | n/a | n/a | n/a |
| | Change from same week 2024 | -250 | -200 | -150 | n/a | n/a | n/a |
| Shuttle | BNSF | 170 | 6 | -38 | 500 | n/a | n/a |
| | Change from last week | 82 | 75 | 13 | -150 | n/a | n/a |
| | Change from same week 2024 | -730 | -294 | -438 | n/a | n/a | n/a |
| | UP | -33 | -200 | -100 | 300 | n/a | n/a |
| | Change from last week | 146 | 50 | 0 | n/a | n/a | n/a |
| | Change from same week 2024 | -142 | -350 | -38 | n/a | n/a | n/a |
| | CPKC | -100 | n/a | n/a | n/a | n/a | n/a |
| | Change from last week | 0 | n/a | n/a | n/a | n/a | n/a |
| | Change from same week 2024 | 50 | n/a | 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, July 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 | \$83.09 | \$5,715.09 | \$1.54 | \$56.75 | 3.7 |
| | BNSF | Williston, ND | Superior, WI | Shuttle | \$4,091 | \$42.77 | \$4,133.77 | \$1.12 | \$41.05 | 6.5 |
| | CP | Westby, MT | St. Louis, MO | Unit | \$6,500 | \$368.80 | \$6,868.80 | \$1.86 | \$68.21 | 5.4 |
| HRS | BNSF | Alton (Hillsboro), ND | Chicago, IL | DET | \$4,604 | \$49.77 | \$4,653.77 | \$1.26 | \$46.21 | 5.5 |
| | BNSF | Alton (Hillsboro), ND | PNW (Seattle, WA) | Shuttle | \$6,015 | \$105.07 | \$6,120.07 | \$1.65 | \$60.78 | 3.0 |
| | BNSF | Alton (Hillsboro), ND | Superior, WI | Shuttle | \$2,665 | \$20.58 | \$2,685.58 | \$0.73 | \$26.67 | 11.5 |
| | BNSF | Alton (Hillsboro), ND | Texas Gulf (Houston, TX) | Shuttle | \$5,432 | \$107.03 | \$5,539.03 | \$1.50 | \$55.01 | 3.3 |
| | BNSF | Bucyrus, ND | PNW (Seattle, WA) | Shuttle | \$5,638 | \$88.69 | \$5,726.69 | \$1.55 | \$56.87 | 3.6 |
| | BNSF | Macon, MT | PNW (Seattle, WA) | Shuttle | \$5,212 | \$72.66 | \$5,284.66 | \$1.43 | \$52.48 | 4.3 |
| | CP | Minot, ND | Kalama, WA | Unit | \$5,498 | \$390.17 | \$5,888.17 | \$1.59 | \$58.47 | 4.4 |
| | CP | Nekoma, ND | Chicago, IL | Manifest | \$4,830 | \$234.49 | \$5,064.49 | \$1.37 | \$50.29 | 5.6 |
| HRW | BNSF | Concordia, KS | Greenwood (Mendota), IL | Shuttle | \$3,400 | \$44.66 | \$3,444.66 | \$0.93 | \$34.21 | -12.6 |
| | BNSF | Enid, OK | Texas Gulf (Houston, TX) | Shuttle | \$3,600 | \$39.41 | \$3,639.41 | \$0.98 | \$36.14 | -15.0 |
| | BNSF | Garden City, KS | PNW (Seattle, WA) | Shuttle | \$5,800 | \$133.00 | \$5,933.00 | \$1.60 | \$58.92 | -15.0 |
| | BNSF | Garden City, KS | San Bernardino, CA | DET | \$5,700 | \$96.32 | \$5,796.32 | \$1.57 | \$57.56 | -2.3 |
| | BNSF | Garden City, KS | Texas Gulf (Houston, TX) | Shuttle | \$4,200 | \$60.13 | \$4,260.13 | \$1.15 | \$42.31 | -13.3 |
| | BNSF | Salina, KS | Texas Gulf (Houston, TX) | Shuttle | \$4,000 | \$52.99 | \$4,052.99 | \$1.10 | \$40.25 | -14.1 |
| | BNSF | Wichita, KS | Birmingham, AL | Shuttle | \$3,500 | \$60.48 | \$3,560.48 | \$0.96 | \$35.36 | -15.6 |
| | BNSF | Wichita, KS | Chicago, IL | DET | \$3,700 | \$44.31 | \$3,744.31 | \$1.01 | \$37.18 | -13.2 |
| | BNSF | Wichita, KS | Texas Gulf (Houston, TX) | Shuttle | \$3,900 | \$44.66 | \$3,944.66 | \$1.07 | \$39.17 | -12.5 |
| | UP | Byers, CO | Houston, TX | Shuttle | \$4,525 | \$325.64 | \$4,850.64 | \$1.31 | \$48.17 | -9.0 |
| | UP | Goodland, KS | Kansas City, MO | Manifest | \$4,967 | \$121.80 | \$5,088.80 | \$1.38 | \$50.53 | 1.2 |
| | UP | Medford, OK | Houston, TX | Shuttle | \$3,775 | \$160.72 | \$3,935.72 | \$1.06 | \$39.08 | -10.1 |
| | UP | Salina, KS | Houston, TX | Shuttle | \$4,025 | \$214.20 | \$4,239.20 | \$1.15 | \$42.10 | -9.7 |
| HRS/HRW | BNSF | Bowdle, SD | Chicago, IL | DET | \$4,591 | \$54.04 | \$4,645.04 | \$1.26 | \$46.13 | 5.4 |
| | BNSF | Conrad, MT | PNW (Seattle, WA) | Shuttle | \$4,239 | \$53.06 | \$4,292.06 | \$1.16 | \$42.62 | 5.9 |
| Soft white | BNSF | Templin (Ritzville), WA | PNW (Seattle, WA) | Shuttle | \$2,032 | \$23.31 | \$2,055.31 | \$0.56 | \$20.41 | -1.3 |
| 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. 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, July 2025

| Commodity | Railroad | Origin | Destination | Car Ownership | Tariff (per car) | Fuel surcharge (per car) | Tariff + fuel surcharge (per car) | Tariff + fuel surcharge (per bushel) | Tariff + fuel surcharge (per metric ton) | Percent Y/Y change |
|-----------|----------|------------------------------|--------------------------|---------------|------------------|--------------------------|-----------------------------------|--------------------------------------|--|--------------------|
| Corn | BNSF | Clarkfield, MN | Hereford, TX | Railroad | \$5,800 | \$74.62 | \$5,874.62 | \$1.48 | \$58.34 | 3.8 |
| | BNSF | Clarkfield, MN | PNW (Seattle, WA) | Railroad | \$5,470 | \$117.88 | \$5,587.88 | \$1.41 | \$55.49 | -4.8 |
| | BNSF | Edison, NE | Hanford, CA | Railroad | \$6,000 | \$124.32 | \$6,124.32 | \$1.54 | \$60.82 | 2.6 |
| | BNSF | Edison, NE | Hereford, TX | Railroad | \$5,040 | \$50.96 | \$5,090.96 | \$1.28 | \$50.56 | 5.0 |
| | BNSF | Edison, NE | PNW (Seattle, WA) | Railroad | \$5,350 | \$123.13 | \$5,473.13 | \$1.38 | \$54.35 | -5.0 |
| | BNSF | Greenwood (Mendota), IL | Hereford, TX | Railroad | \$4,560 | \$65.45 | \$4,625.45 | \$1.17 | \$45.93 | 5.1 |
| | BNSF | Phelps (Rock Port), MO | Clovis, NM | Railroad | \$4,800 | \$53.48 | \$4,853.48 | \$1.22 | \$48.20 | 5.2 |
| | BNSF | Phelps (Rock Port), MO | Texas Gulf (Houston, TX) | Railroad | \$4,540 | \$65.59 | \$4,605.59 | \$1.16 | \$45.74 | 5.1 |
| | BNSF | Selby, SD | PNW (Seattle, WA) | Railroad | \$5,430 | \$99.33 | \$5,529.33 | \$1.39 | \$54.91 | -4.5 |
| | BNSF | St. Cloud, MN | PNW (Seattle, WA) | Railroad | \$5,430 | \$116.62 | \$5,546.62 | \$1.40 | \$55.08 | -4.9 |
| | CN | Gibson City, IL | Reserve, LA | Private | \$2,081 | \$271.01 | \$2,352.01 | \$0.59 | \$23.36 | 6.6 |
| | CN | Gibson City, IL | Reserve, LA | Railroad | \$2,461 | \$271.01 | \$2,732.01 | \$0.69 | \$27.13 | 5.7 |
| | CP | Enderlin, ND | Kalama, WA | Railroad | \$5,047 | \$448.72 | \$5,495.72 | \$1.39 | \$54.58 | -3.6 |
| | CP | Glenwood, MN | Boardman, OR | Railroad | \$5,513 | \$431.79 | \$5,944.79 | \$1.50 | \$59.03 | 1.6 |
| | 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 | \$40.80 | \$1,382.80 | \$0.35 | \$13.73 | -0.6 |
| | UP | Allen Station (San Jose), IL | Pittsburg, TX | Railroad | \$4,085 | \$193.48 | \$4,278.48 | \$1.08 | \$42.49 | 5.7 |
| | UP | Frankfort, KS | Calipatria, CA | Railroad | \$6,005 | \$440.16 | \$6,445.16 | \$1.63 | \$64.00 | 2.7 |
| Soybeans | UP | Mead, NE | Keyes, CA | Railroad | \$6,165 | \$486.36 | \$6,651.36 | \$1.68 | \$66.05 | 2.4 |
| | UP | Nebraska City, NE | Amarillo, TX | Railroad | \$5,005 | \$199.92 | \$5,204.92 | \$1.31 | \$51.69 | 4.6 |
| | UP | Sloan, IA | Burley, ID | Railroad | \$5,685 | \$329.28 | \$6,014.28 | \$1.52 | \$59.72 | 3.4 |
| | UP | Sterling, IL | Nashville, AR | Railroad | \$4,225 | \$202.44 | \$4,427.44 | \$1.12 | \$43.97 | 5.5 |
| | BNSF | Argyle, MN | PNW (Seattle, WA) | Railroad | \$6,135 | \$106.96 | \$6,241.96 | \$1.69 | \$61.99 | -4.2 |
| | BNSF | Casselton, ND | PNW (Seattle, WA) | Railroad | \$6,085 | \$102.83 | \$6,187.83 | \$1.67 | \$61.45 | -4.1 |
| | BNSF | Casselton, ND | St. Louis, MO | Railroad | \$3,400 | \$59.85 | \$3,459.85 | \$0.94 | \$34.36 | -25.0 |
| | BNSF | Mitchell, SD | PNW (Seattle, WA) | Railroad | \$6,185 | \$113.68 | \$6,298.68 | \$1.70 | \$62.55 | -4.3 |
| | BNSF | St. Cloud, MN | PNW (Seattle, WA) | Railroad | \$6,235 | \$116.62 | \$6,351.62 | \$1.72 | \$63.07 | -4.3 |
| | CN | Gibson City, IL | Reserve, LA | Private | \$2,081 | \$271.01 | \$2,352.01 | \$0.64 | \$23.36 | 7.0 |
| | CN | Gibson City, IL | Reserve, LA | Railroad | \$2,461 | \$271.01 | \$2,732.01 | \$0.74 | \$27.13 | 6.0 |
| | CP | Enderlin, ND | Kalama, WA | Railroad | \$5,785 | \$448.72 | \$6,233.72 | \$1.68 | \$61.90 | -3.2 |
| | CP | Enderlin, ND | East St. Louis, IL | Railroad | \$3,526 | \$342.96 | \$3,868.96 | \$1.05 | \$38.42 | -1.1 |
| | 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 | \$209.16 | \$5,359.16 | \$1.45 | \$53.22 | 4.4 |
| | UP | Cozad, NE | Kalama, WA | Railroad | \$6,140 | \$437.36 | \$6,577.36 | \$1.78 | \$65.32 | 2.7 |
| | UP | Cozad, NE | Houston, TX | Railroad | \$5,510 | \$301.84 | \$5,811.84 | \$1.57 | \$57.71 | 3.6 |
| | UP | Sloan, IA | Ama, LA | Railroad | \$5,590 | \$344.68 | \$5,934.68 | \$1.60 | \$58.93 | 3.4 |

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.

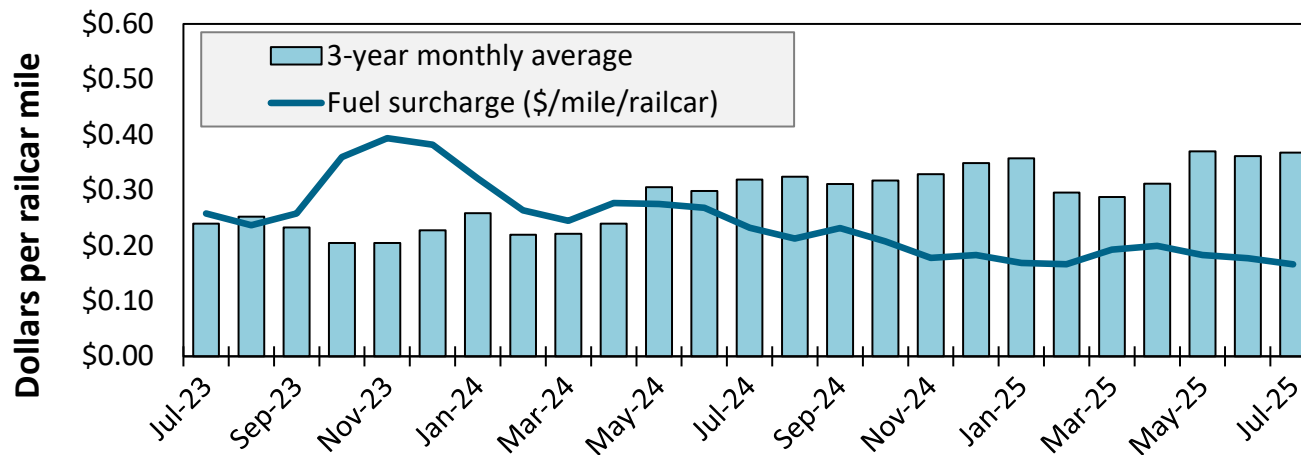
Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, July 2025

| Commodity | US origin | US border city | US railroad | Train type | US rate plus fuel surcharge per car (USD) | US tariff rate + fuel surcharge per metric ton (USD) | US tariff rate + fuel surcharge per bushel (USD) | Percent M/M | Percent Y/Y |
|-----------|------------------|----------------|-------------|-------------|---|--|--|-------------|-------------|
| Corn | Adair, IL | El Paso, TX | BNSF | Shuttle | \$4,650 | \$45.77 | \$1.16 | -0.3 | 4.4 |
| | Atchison, KS | Laredo, TX | CPKC | Non-shuttle | \$5,415 | \$53.29 | \$1.35 | -0.4 | - |
| | Marshall, MO | Laredo, TX | CPKC | Non-shuttle | \$5,538 | \$54.51 | \$1.38 | -0.4 | - |
| | Polo, IL | El Paso, TX | BNSF | Shuttle | \$4,658 | \$45.84 | \$1.16 | -0.3 | 4.2 |
| | Pontiac, IL | Eagle Pass, TX | UP | Shuttle | \$5,043 | \$49.63 | \$1.26 | -0.5 | 3.9 |
| | Sterling, IL | Eagle Pass, TX | UP | Shuttle | \$5,176 | \$50.94 | \$1.29 | -0.5 | 3.7 |
| | Superior, NE | El Paso, TX | BNSF | Shuttle | \$5,071 | \$49.91 | \$1.27 | -0.2 | 4.5 |
| | Delhi, LA | Laredo, TX | CPKC | Non-shuttle | \$3,995 | \$39.32 | \$1.00 | -0.3 | - |
| Soybeans | Slater, MO | Laredo, TX | CPKC | Non-shuttle | \$5,402 | \$53.17 | \$1.35 | -0.4 | - |
| | Atchison, KS | Laredo, TX | CPKC | Non-shuttle | \$5,415 | \$53.29 | \$1.45 | -0.4 | - |
| | Grand Island, NE | Eagle Pass, TX | UP | Shuttle | \$6,590 | \$64.86 | \$1.77 | -0.4 | 3.0 |
| | Marshall, MO | Laredo, TX | CPKC | Non-shuttle | \$5,538 | \$54.51 | \$1.48 | -0.4 | - |
| | Roelyn, IA | Eagle Pass, TX | UP | Shuttle | \$6,691 | \$65.85 | \$1.79 | -0.4 | 2.9 |
| Wheat | Corder, MO | Laredo, TX | CPKC | Non-shuttle | \$5,389 | \$53.04 | \$1.44 | -0.4 | - |
| | FT Worth, TX | El Paso, TX | BNSF | DET | \$3,087 | \$30.38 | \$0.83 | -0.4 | -26.9 |
| | FT Worth, TX | El Paso, TX | BNSF | Shuttle | \$2,887 | \$28.41 | \$0.77 | -0.4 | -23.7 |
| | Great Bend, KS | Laredo, TX | UP | Shuttle | \$4,354 | \$42.85 | \$1.17 | -0.4 | -10.1 |
| | Wichita, KS | Laredo, TX | UP | Shuttle | \$4,249 | \$41.82 | \$1.14 | -0.4 | -8.1 |
| | Pratt, KS | Eagle Pass, TX | UP | Shuttle | \$4,483 | \$44.12 | \$1.20 | -0.4 | -5.6 |

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



July 2025: \$0.17/mile, down 1 cent from last month's surcharge of \$0.18/mile; down 6 cents from the July 2024 surcharge of \$0.23/mile; and down 20 cents from the July prior 3-year average of \$0.37/mile.

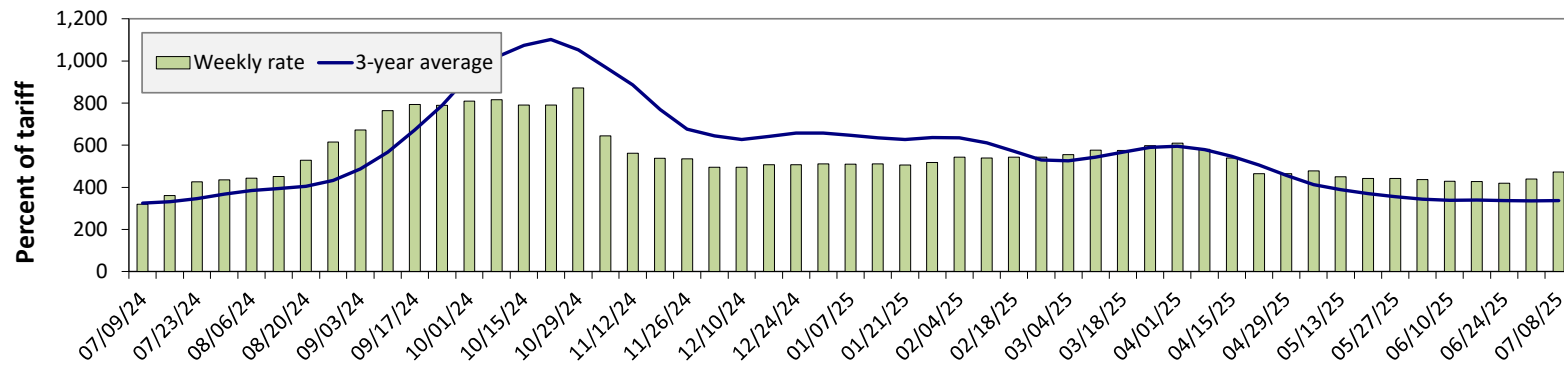
Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year.

Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Railway, Union Pacific Railroad, Kansas City Southern Railway, Norfolk Southern Corporation.

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Figure 10. Illinois River barge freight rate



For the week ending July 8: 7 percent higher than the previous week; 48 percent higher than last year; and 40 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 | 7/8/2025 | 584 | 510 | 472 | 332 | 325 | 289 |
| | 7/1/2025 | 573 | 473 | 440 | 315 | 322 | 278 |
| \$/ton | 7/8/2025 | 36.15 | 27.13 | 21.90 | 13.25 | 15.24 | 9.07 |
| | 7/1/2025 | 35.47 | 25.16 | 20.42 | 12.57 | 15.10 | 8.73 |
| Measure | Time Period | Twin Cities | Mid-Mississippi | Illinois River | St. Louis | Ohio River | Cairo-Memphis |
| Current week % change from the same week | Last year | 32 | 39 | 48 | 54 | 34 | 36 |
| | 3-year avg. | 35 | 37 | 40 | 23 | 3 | 10 |
| Rate | August | 604 | 533 | 511 | 458 | 471 | 459 |
| | October | 764 | 741 | 727 | 705 | 719 | 693 |

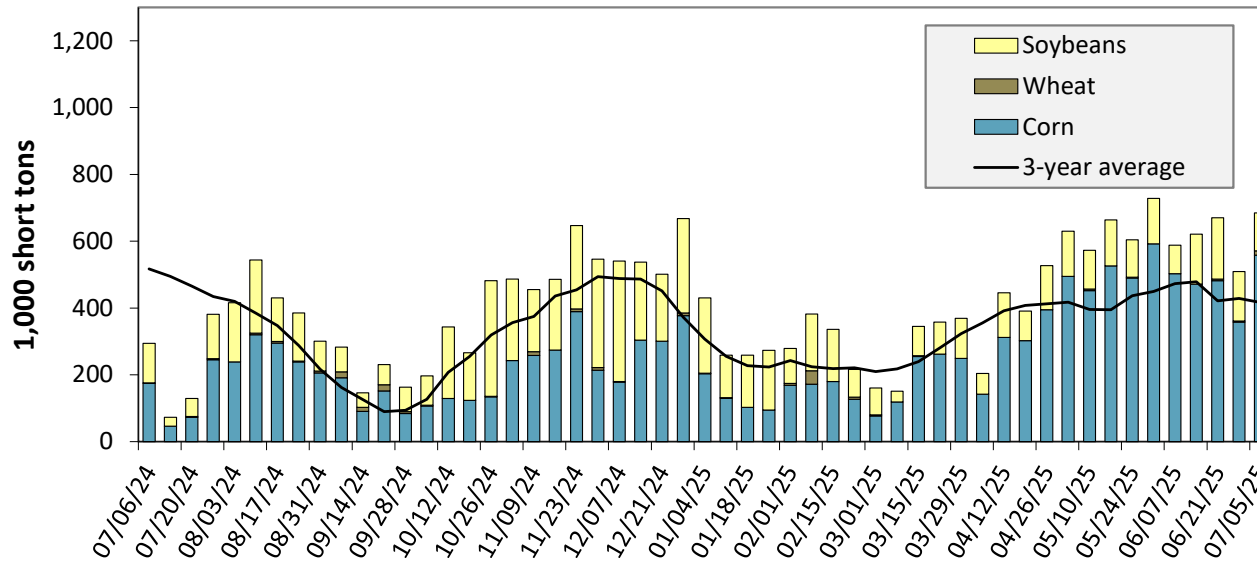
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of \$6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi 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 July 5: 133 percent higher than last year and 64 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.

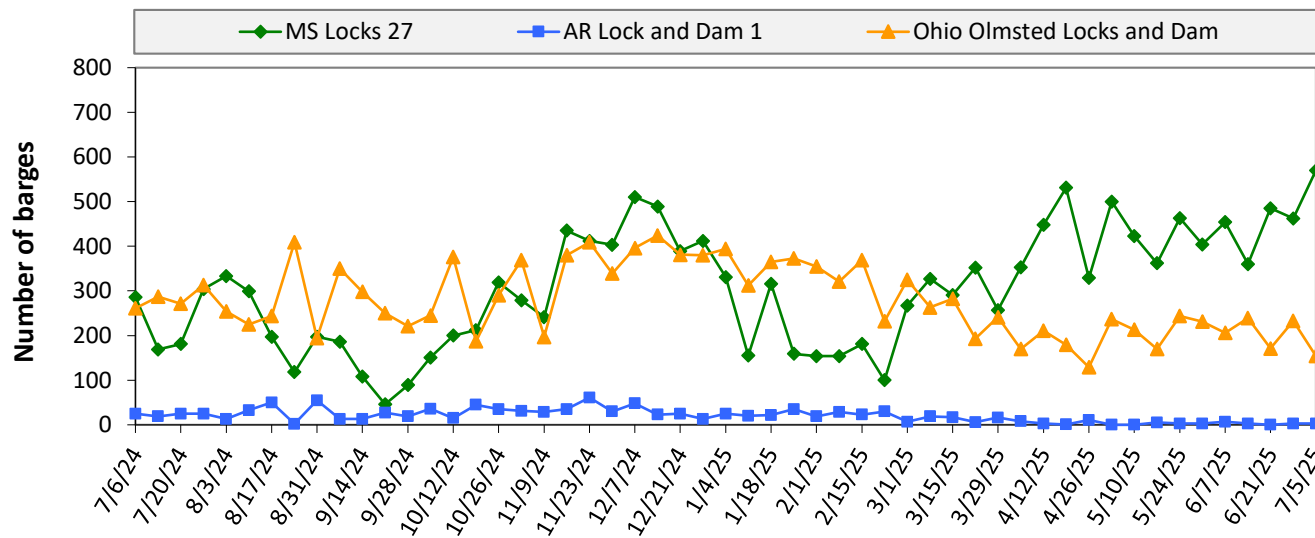
Table 10. Barged grain movements (1,000 tons)

| For the week ending 07/05/2025 | Corn | Wheat | Soybeans | Other | Total |
|--|--------|-------|----------|-------|--------|
| Mississippi River (Rock Island, IL (L15)) | 117 | 2 | 93 | 0 | 212 |
| Mississippi River (Winfield, MO (L25)) | 387 | 14 | 89 | 0 | 490 |
| Mississippi River (Alton, IL (L26)) | 583 | 14 | 117 | 0 | 715 |
| Mississippi River (Granite City, IL (L27)) | 558 | 13 | 114 | 0 | 685 |
| Illinois River (La Grange) | 127 | 2 | 28 | 0 | 156 |
| Ohio River (Olmsted) | 37 | 27 | 20 | 0 | 84 |
| Arkansas River (L1) | 0 | 11 | 1 | 0 | 13 |
| Weekly total - 2025 | 595 | 51 | 135 | 0 | 781 |
| Weekly total - 2024 | 251 | 41 | 147 | 0 | 439 |
| 2025 YTD | 11,054 | 579 | 5,360 | 108 | 17,101 |
| 2024 YTD | 7,345 | 862 | 5,650 | 140 | 13,997 |
| 2025 as % of 2024 YTD | 150 | 67 | 95 | 77 | 122 |
| Last 4 weeks as % of 2024 | 189 | 63 | 115 | 16 | 149 |
| 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.

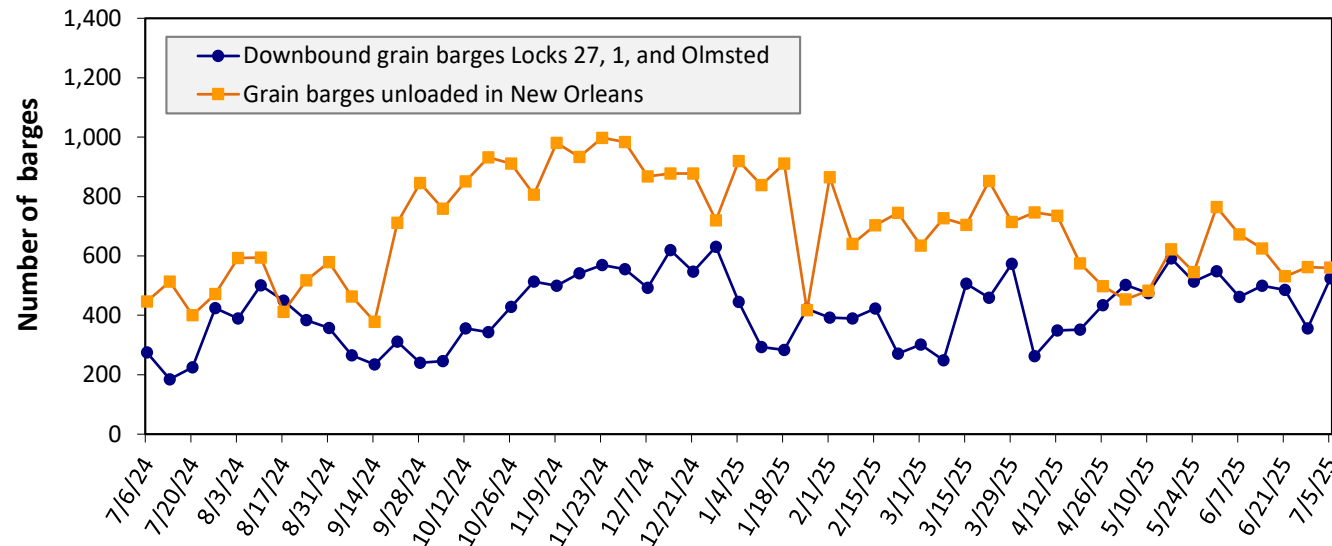
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending July 5: 727 barges transited the locks, 29 barges more than the previous week, and 36 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 July 5: 525 barges moved down river, 169 more than the previous week; 560 grain barges unloaded in the New Orleans Region, unchanged from 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 | |
|----------------|--------------------------------------|-----------|-----------|-----------|--|-------------|
| | | July 2025 | June 2025 | July 2024 | Last year | 3-year avg. |
| Snake River | Lewiston, ID/Clarkston, WA/Wilma, WA | \$21.92 | \$21.63 | \$20.95 | 4.6 | 5.4 |
| | Central Ferry, WA/Almota, WA | \$21.02 | \$20.73 | \$20.08 | 4.7 | 5.3 |
| | Lyons Ferry, WA | \$20.01 | \$19.72 | \$19.11 | 4.7 | 5.0 |
| | Windust, WA/Lower Monumental, WA | \$18.98 | \$18.69 | \$18.12 | 4.7 | 4.8 |
| | Sheffler, WA | \$18.95 | \$18.66 | \$18.09 | 4.7 | 4.8 |
| Columbia River | Burbank, WA/Kennewick, WA/Pasco, WA | \$17.75 | \$17.46 | \$16.94 | 4.8 | 4.4 |
| | Port Kelly, WA/Wallula, WA | \$17.53 | \$17.24 | \$16.73 | 4.8 | 4.3 |
| | Umatilla, OR | \$17.43 | \$17.14 | \$16.63 | 4.8 | 4.3 |
| | Boardman, OR/Hogue Warner, OR | \$17.17 | \$16.88 | \$16.38 | 4.8 | 4.2 |
| | Arlington, OR/Roosevelt, WA | \$17.01 | \$16.72 | \$16.23 | 4.8 | 4.1 |
| | Biggs, OR | \$15.68 | \$15.39 | \$14.95 | 4.9 | 3.7 |
| | The Dalles, OR | \$14.58 | \$14.29 | \$13.89 | 5.0 | 3.2 |

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

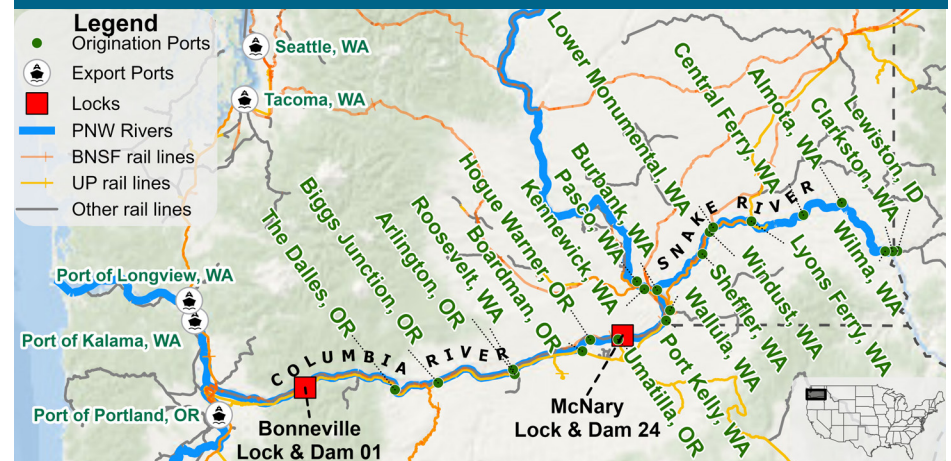
Table 12. Monthly barged grain movements Columbia-Snake (1,000 tons)

| June, 2025 | Wheat | Other | Total |
|---|-------|-------|-------|
| Snake River (McNary Lock and Dam (L24)) | 208 | 0 | 208 |
| Columbia River (Bonneville Lock and Dam (L1)) | 200 | 0 | 200 |
| Monthly total 2025 | 200 | 0 | 200 |
| Monthly total 2024 | 273 | 0 | 273 |
| 2025 YTD | 1,929 | 0 | 1,929 |
| 2024 YTD | 1,337 | 0 | 1,337 |

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.

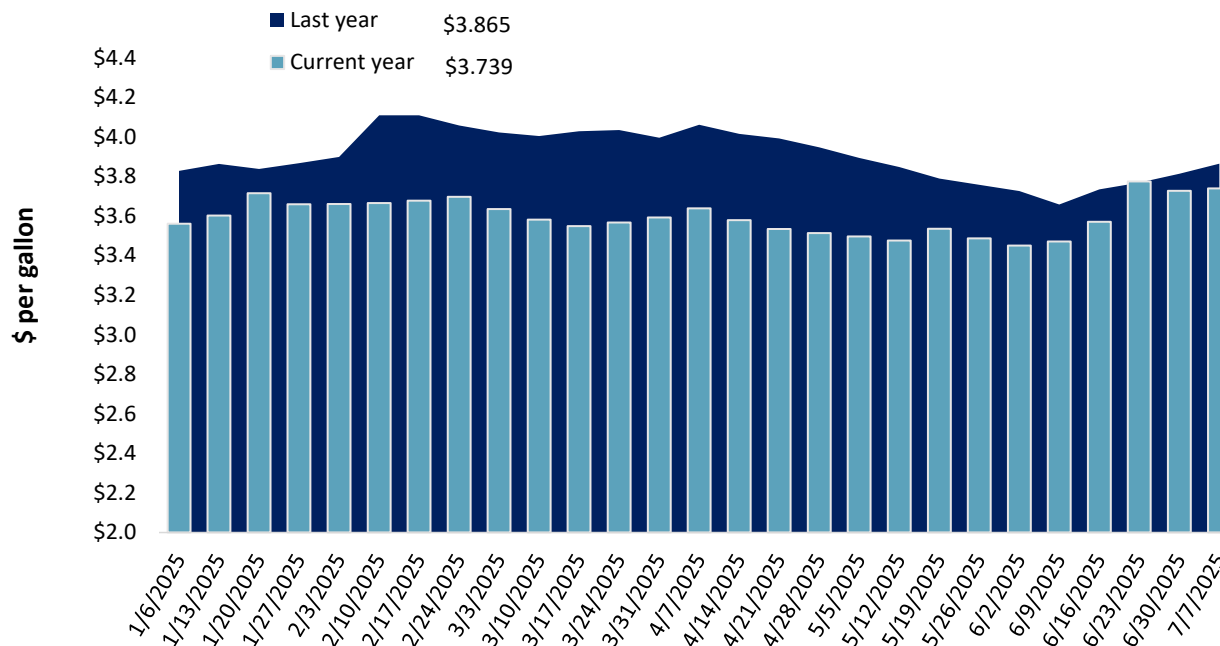
Table 13. Retail on-highway diesel prices, week ending 07/07/2025 (U.S. \$/gallon)

| Region | Location | Price | Change from | |
|--------|----------------------------|-------|-------------|----------|
| | | | Week ago | Year ago |
| I | East Coast | 3.765 | -0.010 | -0.169 |
| | New England | 3.967 | -0.013 | -0.134 |
| | Central Atlantic | 3.936 | -0.006 | -0.151 |
| | Lower Atlantic | 3.680 | -0.011 | -0.181 |
| II | Midwest | 3.733 | 0.018 | -0.070 |
| III | Gulf Coast | 3.383 | 0.014 | -0.215 |
| IV | Rocky Mountain | 3.666 | 0.007 | -0.124 |
| V | West Coast | 4.462 | 0.041 | 0.008 |
| | West Coast less California | 4.088 | 0.053 | 0.070 |
| | California | 4.892 | 0.026 | -0.063 |
| Total | United States | 3.739 | 0.012 | -0.126 |

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 July 7, the U.S. average diesel fuel price increased 1.2 cents from the previous week to \$3.739 per gallon, 12.6 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 6/26/2025 | 2,134 | 1,125 | 1,673 | 865 | 92 | 5,889 | 11,883 | 4,075 | 21,847 |
| | This week year ago | 1,411 | 972 | 1,976 | 1,147 | 127 | 5,633 | 9,555 | 3,616 | 18,804 |
| | Last 4 wks. as % of same period 2023/24 | 158 | 112 | 82 | 72 | 69 | 104 | 138 | 106 | 121 |
| Current shipped (cumulative) exports sales | 2024/25 YTD | 582 | 115 | 409 | 179 | 4 | 1,289 | 56,224 | 45,861 | 103,375 |
| | 2023/24 YTD | 284 | 129 | 412 | 441 | 0 | 1,266 | 44,180 | 41,056 | 86,503 |
| | YTD 2024/25 as % of 2023/24 | 205 | 90 | 99 | 41 | 0 | 102 | 127 | 112 | 120 |
| | Total 2023/24 | 3,535 | 4,260 | 6,314 | 3,906 | 526 | 18,540 | 54,277 | 44,510 | 117,328 |
| | Total 2022/23 | 4,872 | 2,695 | 5,382 | 4,414 | 395 | 17,759 | 39,469 | 52,208 | 109,435 |

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

Source: USDA, Foreign Agricultural Service.

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

| For the week ending 6/26/2025 | 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 | 3,700 | 22,102 | 21,609 | 2 | 17,746 |
| Japan | 570 | 12,365 | 10,403 | 19 | 9,366 |
| China | 0 | 33 | 2,815 | -99 | 8,233 |
| Colombia | 130 | 7,209 | 5,750 | 25 | 4,383 |
| Korea | 2 | 5,923 | 2,181 | 172 | 1,565 |
| Top 5 importers | 4,402 | 47,632 | 42,757 | 11 | 41,293 |
| Total U.S. corn export sales | 4,534 | 68,107 | 53,735 | 27 | 51,170 |
| % of YTD current month's export projection | 7% | 101% | 92% | - | - |
| Change from prior week | 940 | 533 | 357 | - | - |
| Top 5 importers' share of U.S. corn export sales | 97% | 70% | 80% | - | 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 6/26/2025 | 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 | 24,379 | -8 | 28,636 |
| Mexico | 470 | 5,056 | 4,761 | 6 | 4,917 |
| Japan | 95 | 1,967 | 2,051 | -4 | 2,231 |
| Egypt | 0 | 3,285 | 1,307 | 151 | 2,228 |
| Indonesia | 15 | 1,862 | 2,014 | -8 | 1,910 |
| Top 5 importers | 580 | 34,649 | 34,511 | 0 | 39,922 |
| Total U.S. soybean export sales | 1,588 | 49,936 | 44,672 | 12 | 51,302 |
| % of YTD current month's export projection | 3% | 99% | 97% | - | - |
| Change from prior week | 239 | 462 | 170 | - | - |
| Top 5 importers' share of U.S. soybean export sales | 36% | 69% | 77% | - | 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 6/26/2025 | 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 | 1,304 | 1,185 | 10 | 3,358 |
| Philippines | 758 | 1,032 | -27 | 2,473 |
| Japan | 606 | 511 | 19 | 2,045 |
| China | 0 | 68 | -100 | 1,137 |
| Korea | 364 | 615 | -41 | 1,674 |
| Taiwan | 301 | 336 | -11 | 935 |
| Thailand | 233 | 227 | 3 | 667 |
| Nigeria | 279 | 80 | 249 | 629 |
| Indonesia | 220 | 150 | 47 | 518 |
| Colombia | 243 | 111 | 119 | 489 |
| Top 10 importers | 4,307 | 4,313 | -0 | 13,926 |
| Total U.S. wheat export sales | 7,178 | 6,899 | 4 | 19,135 |
| % of YTD current month's export projection | 32% | 31% | - | - |
| Change from prior week | 586 | 805 | - | - |
| Top 10 importers' share of U.S. wheat export sales | 60% | 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)

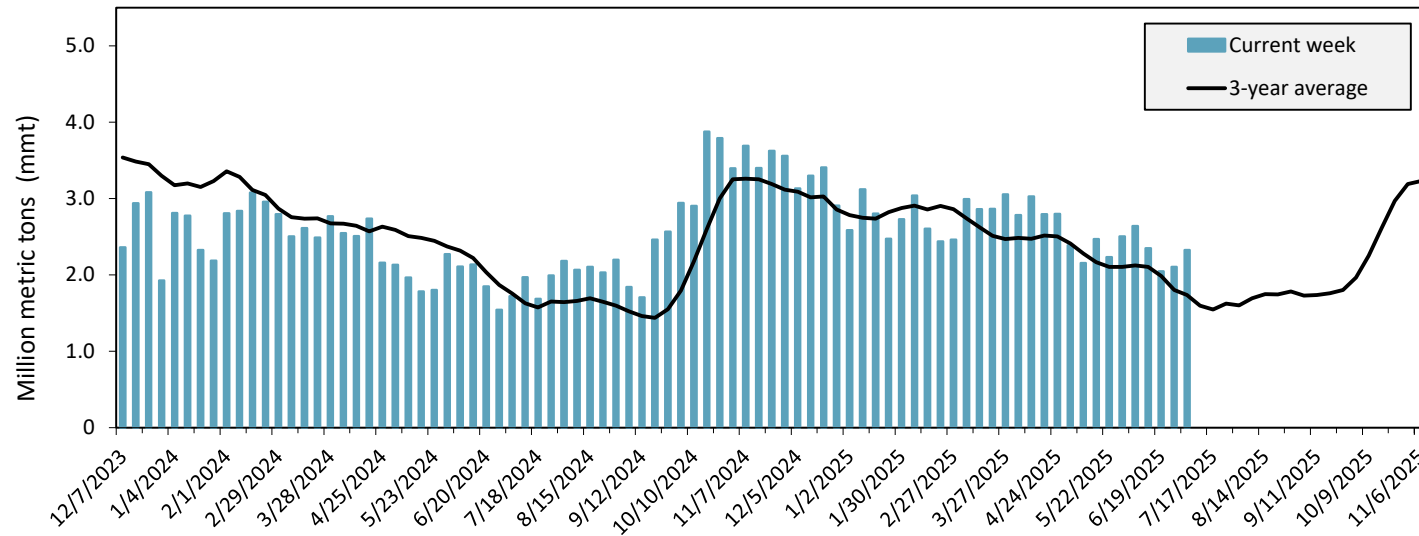
| Port regions | Commodity | For the week ending 07/03/2025 | Previous week* | Current week as % of previous | 2025 YTD* | 2024 YTD* | 2025 YTD as % of 2024 YTD | Last 4-weeks as % of: | | 2024 total* |
|-------------------|-----------|-----------------------------------|-------------------|----------------------------------|-----------|-----------|------------------------------|-----------------------|------------------|-------------|
| | | | | | | | | Last year | Prior 3-yr. avg. | |
| Pacific Northwest | Corn | 443 | 451 | 98 | 13,173 | 9,974 | 132 | 134 | 184 | 13,987 |
| | Soybeans | 0 | 0 | n/a | 1,966 | 2,523 | 78 | n/a | n/a | 10,445 |
| | Wheat | 105 | 186 | 57 | 5,509 | 5,533 | 100 | 64 | 78 | 11,453 |
| | All grain | 549 | 648 | 85 | 20,753 | 19,114 | 109 | 105 | 125 | 37,186 |
| Mississippi Gulf | Corn | 705 | 654 | 108 | 19,786 | 13,499 | 147 | 147 | 145 | 27,407 |
| | Soybeans | 260 | 74 | 349 | 10,599 | 11,592 | 91 | 66 | 69 | 29,741 |
| | Wheat | 122 | 55 | 222 | 1,775 | 2,630 | 67 | 169 | 114 | 4,523 |
| | All grain | 1,088 | 784 | 139 | 32,160 | 27,775 | 116 | 127 | 124 | 61,789 |
| Texas Gulf | Corn | 0 | 0 | n/a | 158 | 267 | 59 | 35 | 31 | 570 |
| | Soybeans | 0 | 0 | n/a | 106 | 0 | n/a | n/a | n/a | 741 |
| | Wheat | 130 | 146 | 88 | 2,057 | 794 | 259 | 301 | 314 | 1,940 |
| | All grain | 130 | 147 | 88 | 2,549 | 2,977 | 86 | 187 | 170 | 6,965 |
| Interior | Corn | 333 | 276 | 121 | 6,988 | 7,035 | 99 | 122 | 144 | 13,463 |
| | Soybeans | 124 | 159 | 78 | 3,449 | 3,686 | 94 | 104 | 130 | 8,059 |
| | Wheat | 78 | 68 | 116 | 1,517 | 1,502 | 101 | 82 | 99 | 2,952 |
| | All grain | 545 | 502 | 109 | 12,244 | 12,342 | 99 | 114 | 135 | 24,753 |
| Great Lakes | Corn | 0 | 0 | n/a | 21 | 0 | n/a | n/a | 606 | 271 |
| | Soybeans | 0 | 0 | n/a | 0 | 18 | 0 | n/a | n/a | 136 |
| | Wheat | 0 | 20 | 0 | 125 | 165 | 76 | 66 | 110 | 653 |
| | All grain | 0 | 20 | 0 | 145 | 183 | 79 | 132 | 117 | 1,060 |
| Atlantic | Corn | 9 | 0 | n/a | 182 | 199 | 92 | 63 | 59 | 410 |
| | Soybeans | 5 | 4 | 142 | 464 | 436 | 106 | 168 | 20 | 1,272 |
| | Wheat | 1 | 1 | n/a | 35 | 12 | 297 | 103 | 30 | 73 |
| | All grain | 15 | 4 | 373 | 681 | 647 | 105 | 84 | 34 | 1,754 |
| All Regions | Corn | 1,491 | 1,381 | 108 | 40,308 | 30,973 | 130 | 137 | 152 | 56,109 |
| | Soybeans | 389 | 237 | 164 | 16,687 | 18,308 | 91 | 80 | 80 | 50,865 |
| | Wheat | 437 | 477 | 92 | 11,017 | 10,636 | 104 | 104 | 115 | 21,594 |
| | All grain | 2,326 | 2,105 | 110 | 68,636 | 63,092 | 109 | 120 | 127 | 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.

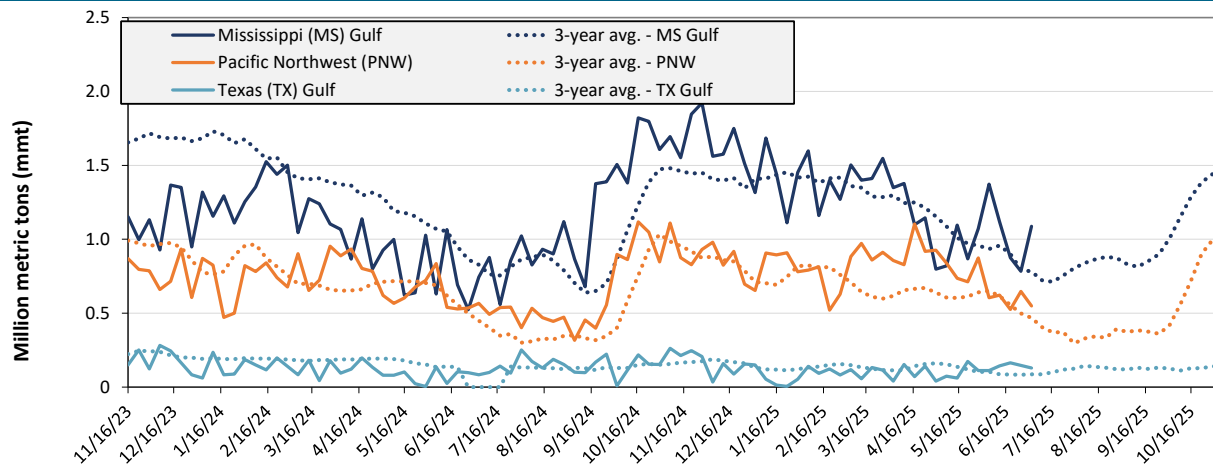
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending July 3: 2.3 mmt of grain inspected, up 10 percent from the previous week, up 25 percent from the same week last year, and up 34 percent from the 3-year average.

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

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



Week ending 07/03/25 inspections (mmt):

MS Gulf: 1.09

PNW: 0.55

TX Gulf: 0.13

| Percent change from: | MS Gulf | TX Gulf | U.S. Gulf | PNW |
|--|---------|---------|-----------|---------|
| Last week | up 39 | down 12 | up 31 | down 15 |
| Last year (same 7 days) | up 40 | up 53 | up 41 | down 14 |
| 3-year average (4-week moving average) | up 39 | up 51 | up 40 | up 17 |

Source: USDA, Federal Grain Inspection Service.

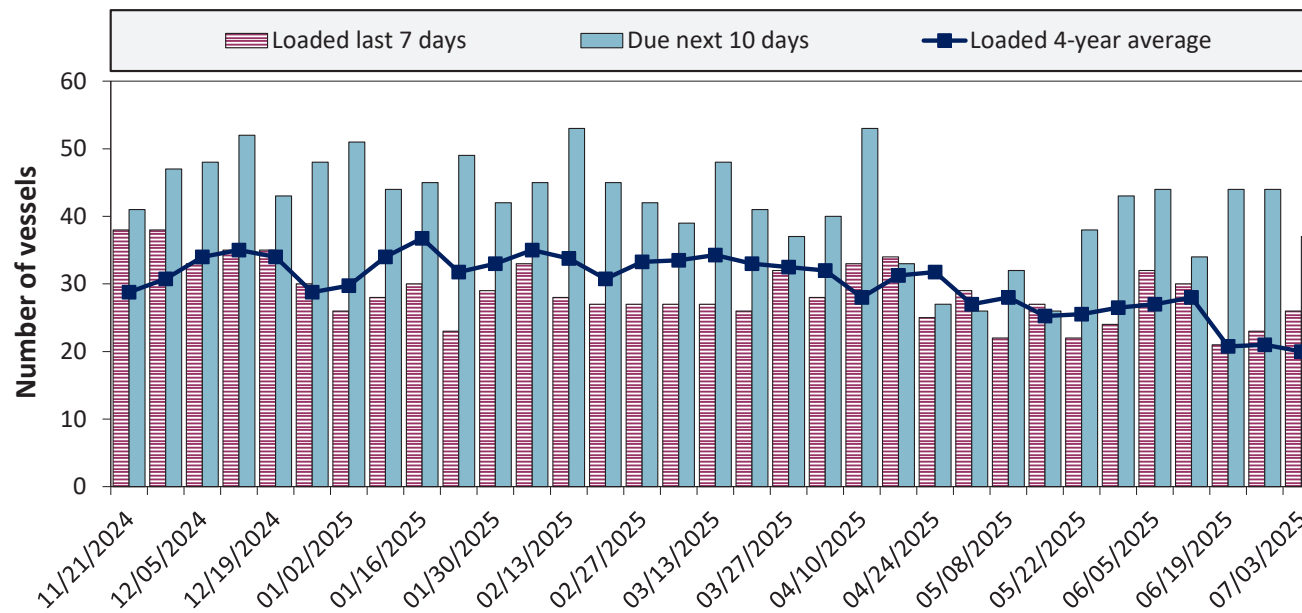
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

| Date | Gulf | | | Pacific Northwest |
|--------------|-----------|---------------|------------------|-------------------|
| | In port | Loaded 7-days | Due next 10-days | In port |
| 7/3/2025 | 17 | 26 | 37 | 5 |
| 6/26/2025 | 14 | 23 | 44 | 9 |
| 2024 range | (11...45) | (18...38) | (29...61) | (3...25) |
| 2024 average | 28 | 28 | 45 | 13 |

Note: The data are voluntarily submitted and may not be complete.

Source: USDA, Agricultural Marketing Service.

Figure 19. U.S. Gulf vessel loading activity

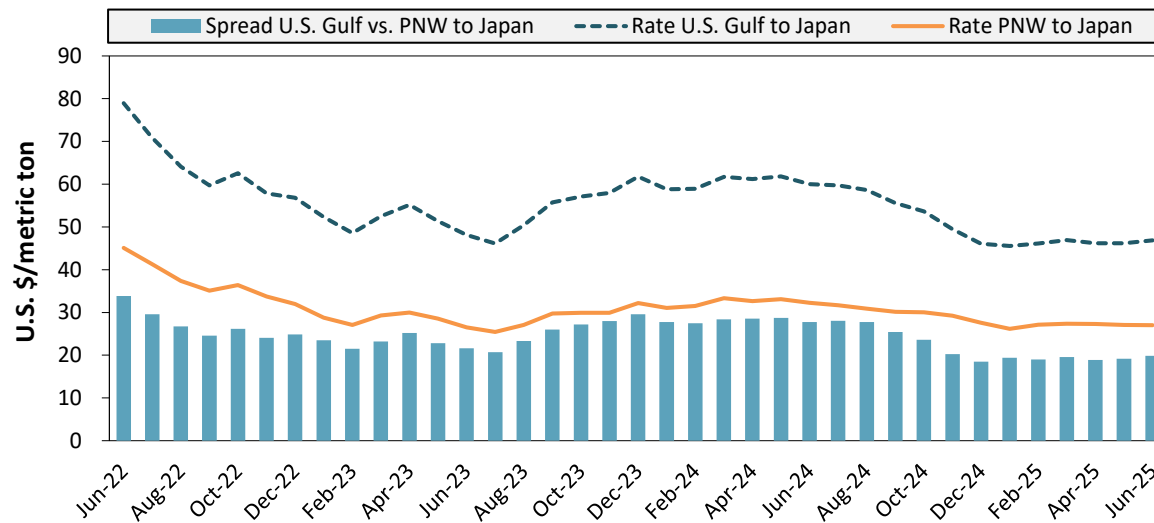


| Week ending 07/03/25, number of vessels | Loaded | Due |
|--|--------|-----|
| Change from last year | 30% | -8% |
| Change from 4-year average | 30% | 7% |

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



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

| Ocean rates | U.S. Gulf | PNW | Spread |
|----------------------------|-----------|---------|---------|
| June 2025 | \$46.88 | \$27.00 | \$19.88 |
| Change from June 2024 | -22% | -16% | -28% |
| Change from 4-year average | -27% | -25% | -30% |

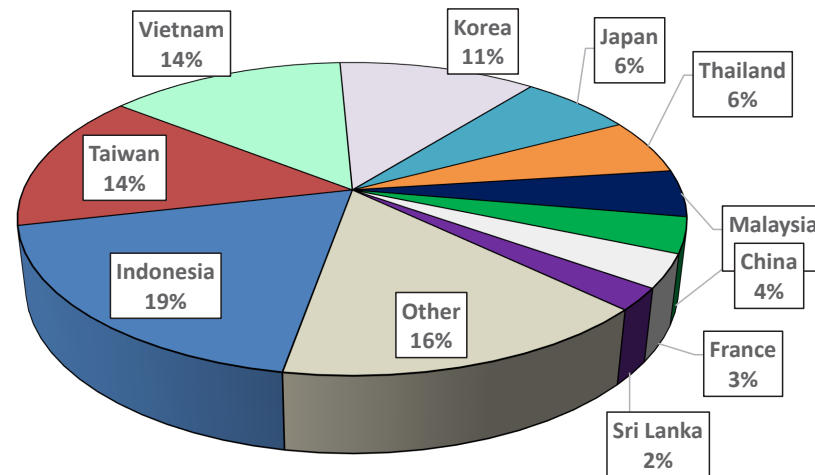
Table 20. Ocean freight rates for selected shipments, week ending 7/5/2025

| Export region | Import region | Grain types | Entry date | Loading date | Volume loads (metric tons) | Freight rate (US\$/metric ton) |
|---------------|---------------|--------------|--------------|---------------------|----------------------------|--------------------------------|
| U.S. Gulf | S. Korea | Heavy grain | Jun 23, 2025 | Jul 1/10, 2025 | 58,000 | 55.50 |
| U.S. Gulf | Morocco | Soybeans | May 23, 2025 | Jun 5/15, 2025 | 46,000 | 42.38 |
| PNW | Japan | Corn | Apr 22, 2025 | Jun 1/10, 2025 | 65,000 | 34.75 |
| PNW | 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 23, 2025 | Jul 20/30, 2025 | 63,000 | 34.00 |
| Brazil | China | Heavy grain | Jun 23, 2025 | Jul 11/15, 2025 | 63,000 | 34.75 |
| Brazil | China | Heavy grain | Jun 5, 2025 | Jun 25/30, 2025 | 63,000 | 37.50 |
| Brazil | China | Heavy grain | 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 | 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.

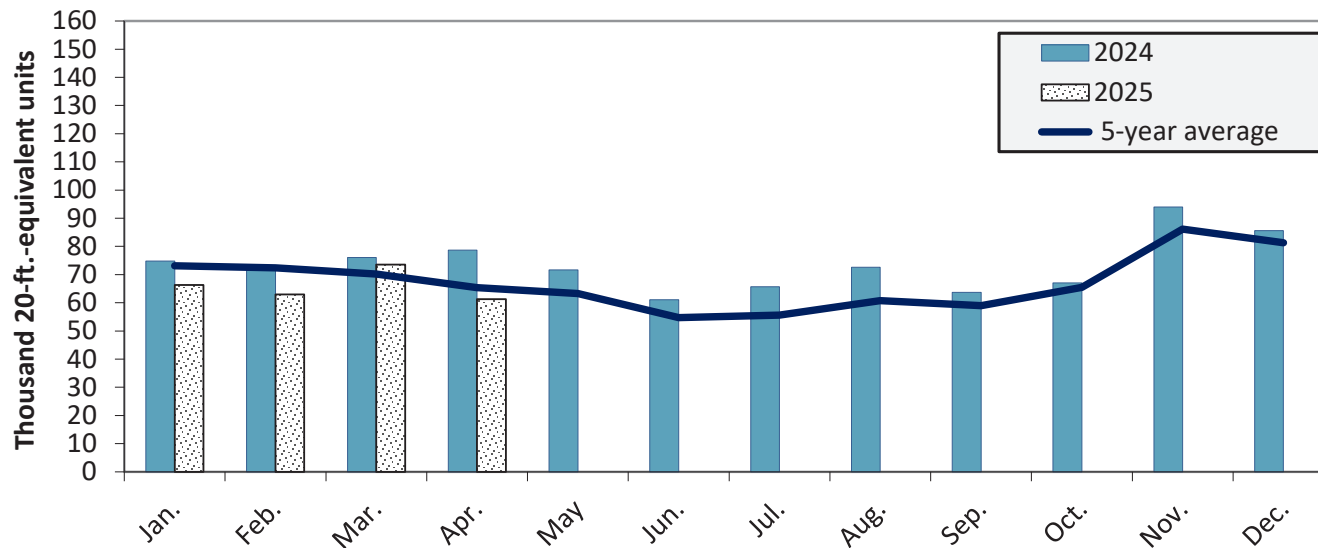
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Apr 2025



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 April 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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