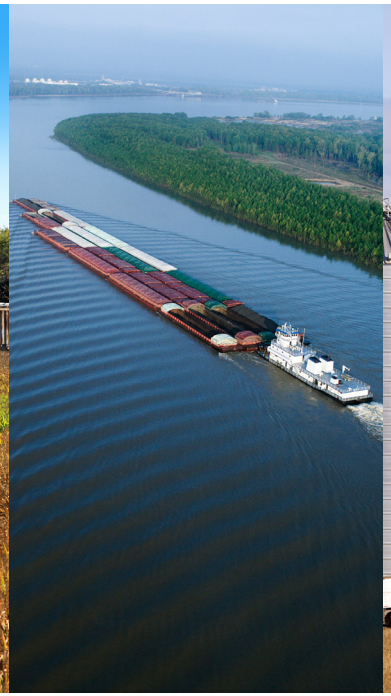
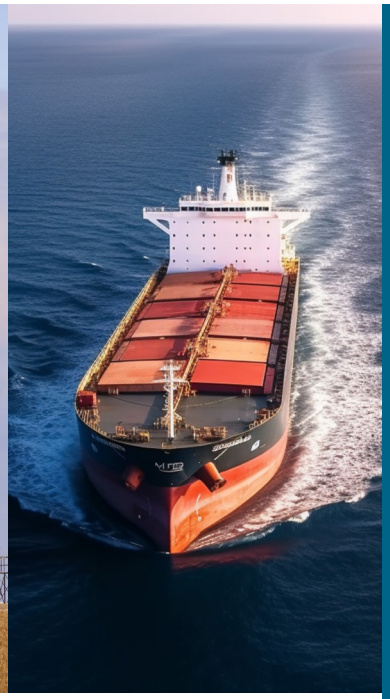
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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Wheat Ground for Flour Declines in Second Quarter. According the latest *Flour Milling Products* report from USDA's National Agricultural Statistics Service, U.S. flour mills ground 223 million bushels (mbu) of wheat for flour during second quarter 2025. This volume is down 2 percent from first quarter 2025 and down 1 percent from the prior 10-year average for the second quarter (hereafter, "average").

By State, the largest shifts in wheat ground for flour occurred in States that produce spring wheat. North Dakota mills ground 16.4 mbu of wheat for flour in second quarter—up 17 percent from average. In contrast, Minnesota mills ground 9.9 mbu of wheat in the second quarter—down 22 percent from average.

Far away from major wheat production areas, flour mills in California and the East Coast typically source a substantial amount of wheat by rail. In the second quarter, East Coast flour mills ground 46.5 mbu of wheat, and California flour mills ground 15.4 mbu of wheat—both down 5 percent from average.

Notable increases in wheat ground for flour occurred in Illinois, Indiana, and Wisconsin—collectively, up 6 percent from average—as well as Kansas and Missouri—collectively, up 7 percent from average.

DOT and DOC Release Data on 2022 Commodity Flows. The Departments of Transportation (DOT) and Commerce (DOC) recently published data from the 2022 Commodity Flow Survey (CFS). A joint effort from DOT's Bureau of Transportation Statistics and DOC's U.S. Census Bureau, the 2022 CFS surveyed 165,000 shippers on their transportation practices, including commodities shipped, modes, origins, destinations, values, and weights.

In 2022, 491 million tons of cereal grains (corn, wheat, and other small grains) of elevator-based shipments were shipped, down 31 percent from 2017. (CFS excludes farm-based shipments.) The following lists shares of cereal grain shipments (by mode) in 2022 and percentage-point (pp) changes since 2017: trucks, 48 percent (–7 pp); railroads, 26 percent (+3 pp); inland waterways, 5 percent (–2 pp); and multiple/other modes, 15 percent (+6 pp). From 2017 to 2022, average shipment distances roughly doubled for truck (from 76 to 152 miles); decreased 10 percent for rail (from 505 to 454 miles); and fell 43 percent for barge (from 942 to 541 miles).

The 2022 CFS is the seventh survey since the program started in 1993.

USDA/AMS Publishes Annual *Ukraine Grain Transportation* Report. USDA/AMS's Transportation Economics Division recently released its sixth annual *Ukraine Grain Transportation report*. With updated data through 2024, the report analyzes the costs of exporting Ukrainian grain (corn, wheat, and soybeans). Given Ukraine's status as the fourth-largest corn exporter and the six-largest wheat exporter, the country's costs can affect the competitiveness of U.S. grain exports.

Led by drops in rail, barge, and ocean freight rates, Ukraine's transportation costs to export grain fell from 2023 to 2024, but remained above pre-war levels. Year to year, Ukraine's grain exports rose from 45.6 million metric tons (mmt) to 52.0 mmt (+14 percent). Since regaining access to the Black Sea routes in late 2023, Ukraine has increased its share of waterborne exports from 80 percent in 2023 to 92 percent in 2024.

USDA projects Ukraine will export 43.7 mmt of corn, soybeans, and wheat in marketing year 2025/26—down 7 percent from the prior 3-year average.

USTR Opens Investigation of Brazil's Unfair Ethanol Practices. On July 15, the Office of the U.S. Trade Representative (USTR) initiated an investigation into Brazil's unfair trade practices regarding ethanol market access. According to USTR, the United States has been burdened by Brazil's high tariffs on ethanol, which have imbalanced U.S. trade with Brazil. Fluctuating from 2017 to 2023, Brazil's tariff rates on U.S. ethanol have been 18 percent since January 1, 2024.

USTR cites Brazil's tariff rates as the cause of a sharp drop in U.S. ethanol exports to Brazil: peaking at $761 million in 2018, U.S. ethanol exports to Brazil fell to $140,000 in 2023, and were $53 million in 2024.

USTR will hold a public hearing about the Brazil investigation on September 3. Please submit written comments, requests to appear at the hearing, and a summary of testimony by Aug. 18. Additional information is available on USTR's website.

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 July 24, **unshipped balances** of corn and soybeans totaled 12.62 million metric tons (mmt), down 9 percent from last week and up 27 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 6.32 mmt, up 5 percent from last week and up 17 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 0.34 mmt, down 47 percent from last week. Net **soybean export sales** were 0.35 mmt, up significantly from last week. Net **wheat export sales** for MY 2025/26 were 0.59 mmt, down 17 percent from last week.

Rail

U.S. Class I railroads originated 27,097 **grain carloads** during the week ending July 26. This was an 8-percent increase from the previous week, 9 percent more than last year, and 24 percent more than the 3-year average.

Average August **shuttle secondary railcar bids/offers** (per car) were $46 below tariff for the week ending July 31. This was $12 less than last week and $84 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were at tariff. This was unchanged from last week and $225 lower than this week last year.

Barge

For the week ending August 2, **barged grain movements** totaled 777,004 tons. This was 8 percent less than the previous week and 25 percent more than the same period last year.

For the week ending August 2, 524 grain barges **moved down river**—18 fewer than last week. There were 798 grain barges **unloaded** in the New Orleans region, 16 percent more than last week.

Ocean

For the week ending July 31, 30 **oceangoing grain vessels** were loaded in the Gulf—15 percent more than the same period last year. Within the next 10 days (starting August 1), 39 vessels were expected to be loaded—11 percent more than the same period last year.

As of July 31, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $54.50, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $28.75 per mt, down 3 percent from the previous week.

Fuel

For the week ending August 4, the **U.S. average diesel fuel price** decreased 0.5 cent from the previous week to $3.800 per gallon, 4.5 cents above the same week last year.

Changes to BNSF's Soybean Rail Tariff Rates in MY 2025/26

Railroads are crucial to moving U.S. soybeans to export terminals. In 2022, railroads moved 38 percent of soybean exports (according to **USDA's annual grain *Modal Share Analysis***). Of all the Class I railroads, BNSF Railway (BNSF) has originated the most grain and oilseed carloads for decades (***Grain Transportation Report* (GTR) table 3**). Given BNSF's prominence in transporting grain and oilseeds by rail, understanding BNSF pricing is key to understanding soybean-export transportation. Ahead of marketing year (MY) 2025/26, BNSF recently announced rail tariff rate changes for soybean shipments, which **GTR table 7** will reflect when they take effect in September.

This article examines BNSF's changes to its soybean rail tariff rates and discusses the tariff rate spreads between the Pacific Northwest (PNW) and other export regions. Lastly, the article considers shifts in soybean demand that may be informing rail tariff rates.

Background: BNSF Shuttle Program and Soybean Flows

Like corn, most of BNSF's soybean shipments are moved by shuttle trains ("shuttles") made up of 110-120 covered hopper railcars. Powered by a dedicated locomotive, each train moves as a single unit. BNSF's shuttles are auctioned to shippers for yearlong contracts, during which shippers control where their shuttles load and unload.

BNSF intends to offer 140 shuttles in MY 2025/26, and the firm has so far sold 102 of them—for $73.4 million (about $719,000 per shuttle contract). Besides bidding in the primary market, shippers can also buy or sell individual shuttle trips in the secondary market from other shippers. Currently, secondary market values for BNSF shuttle trips in October are $700 per car, per trip (**GTR table 5**). This is significantly lower than the prior 3-year average (for the last week in July) when secondary market values for BNSF shuttle trips in October averaged just under $1,400 per car, per trip.

Most of BNSF's soybean shipments originate from elevators in the western Corn Belt. By far, the largest destination for soybeans on BNSF's network is the PNW. To a lesser extent, soybeans are also shipped to the U.S.-Mexico border (for export); St. Louis, MO (for rail-to-barge transfer); Texas Gulf export terminals; and soybean processors (e.g., a **new soybean crushing facility** in Cherryvale, KS).

BNSF Cuts Shuttle Tariff Rates to Southern Destinations; PNW Rates Stay the Same

Last year (beginning in September 2024), BNSF lowered soybean shuttle rates to the PNW by $150 per car.[1] This September, BNSF will not change its soybean shuttle rates to the PNW, while significantly reducing soybean shuttle rates to other export gateways—namely, the U.S.-Mexico border and Texas Gulf export terminals.[2]

Significant Drops for Texas Gulf and Mexico. Shipments to the Texas Gulf will have the largest of the September rate cuts—$1,500 per car ($0.41 per bushel (bu)) for nearly all elevators. This cut equates to 25 percent for the average elevator on BNSF's network and 32 percent for elevators in the Kansas locales of Hutchinson, Milan, Wellington, and Wichita. Although the Texas Gulf is not typically a major export region for soybeans, BNSF's significant rate cuts may incentivize more soybean exports in this lane. In 2024, soybean export inspections in the Texas Gulf were just 1 percent of total U.S. soybean export inspections (**GTR table 18**).

BNSF is also planning to significantly cut rates to Mexico, beginning in September. Nearly all elevators on BNSF's network will see a $1,000 ($0.27/bu) per car rate cut to Eagle Pass, TX, and El Paso, TX. Eagle Pass is the primary gateway for U.S. soybean exports to Mexico by rail.

PNW Tariff Rate Spreads. Similar to PNW-Hereford, TX, tariff rate spreads' use in directing corn shipments (**GTR, July 24, 2025**), soybean tariff rate spreads are useful for identifying potential shifts in soybean flows.

1 Last year, in preparation for MY 2024/25, BNSF initially announced (on May 14) a price increase of $150 per car for PNW soybean shipments. However, on August 9, BNSF canceled that planned increase, and instead announced a reduction of $150 per car for PNW soybean shipments.

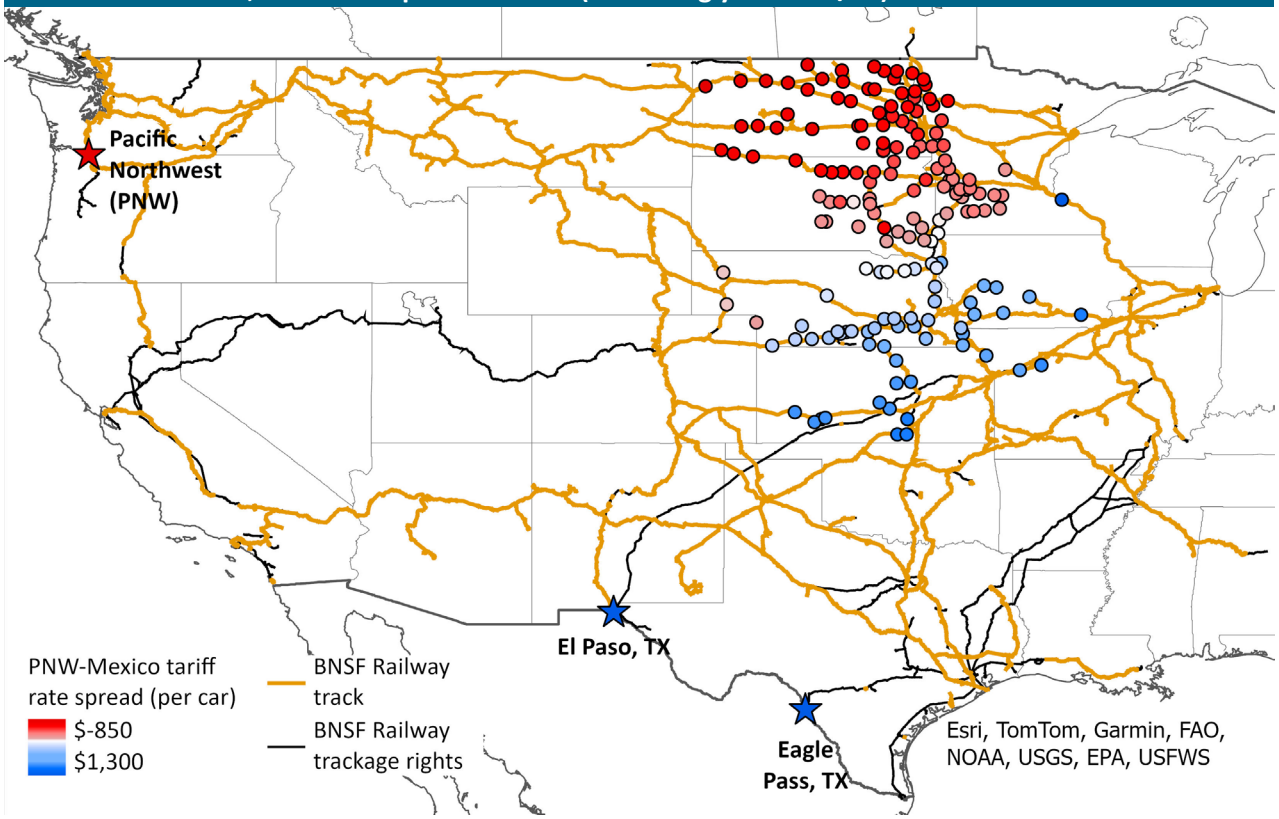
2 BNSF's soybean tariff rates to Mexico can be found in BNSF Tariff 4022; Item 69605. Most other soybean tariff rates (including those to the PNW and Texas Gulf) can be found in BNSF Tariff 4022; Item 69105-M.

Figures 1 and 2 show grain elevators on BNSF's shuttle network that have soybean tariff rates to both the U.S.-Mexico border and the PNW. For each origin, figures 1 and 2 show the difference between the soybean rate to the PNW and the soybean rate to Mexico (the PNW-Mexico tariff rate spread). Figure 1 shows the current spreads (i.e., before the September rate cuts to Mexico go into effect), and **figure 2** shows the spreads after the September rate cuts to Mexico go into effect.

PNW-Mexico tariff rate spreads vary by shuttle-loading elevator. Positive values (i.e., those elevators shaded blue in fig. 1) show the rate to Mexico is less than the rate to the PNW. Conversely, negative values (i.e., those elevators shaded red in fig. 1) show the rate to the PNW is less than the rate to Mexico.

As seen in figure 1, fifty-seven elevators—mainly in Iowa, Kansas, Missouri, and Nebraska—have (positive) spreads that favor Mexico over the PNW. The elevator with the largest positive spread ($1,300 per car) is BNSF's **newest shuttle-loading elevator** in Hager City, WI, which opened earlier this year. Another 111 elevators—mainly in Minnesota, North Dakota, and South Dakota—have negative spreads that favor the PNW over Mexico. The elevators with the largest negative spreads (around –$800 per car) are in western North Dakota, relatively close to the PNW.

Figure 1. BNSF Railway's soybean tariff rate spread between Pacific Northwest export terminals and U.S.-Mexico border, effective September 2024 (marketing year 2024/25)

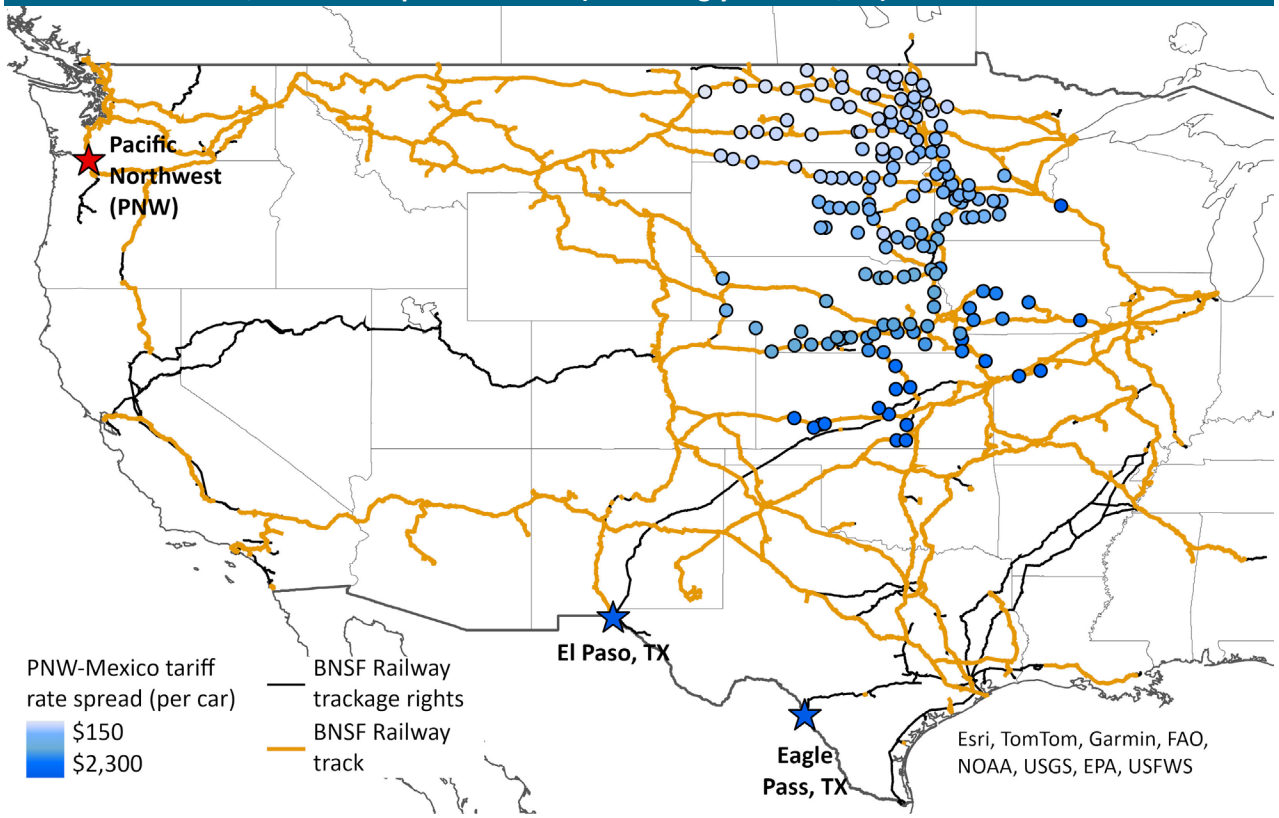


Note: The tariff rate applies to 110-120 car shuttle trains composed of large covered hopper cars.
Source: U.S. Department of Transportation Bureau of Transportation Statistics, North American Rail Network. USDA/Agricultural Marketing Service analysis of BNSF Railway Tariff 4022; Items 69105-M and 69605.

PNW Tariff Rate Spreads After September 1. Figure 2 shows the PNW-Mexico tariff rate spread beginning in September. Because BNSF is set to cut rates to Mexico (by $1,000 per car) and leave PNW rates unchanged, all elevators on BNSF's network will have a positive spread (i.e., a lower tariff rate to Mexico than to the PNW). The smallest spreads (from western North Dakota) will be around $200 per car ($0.05/bu), and the largest (from Hager City, WI) will be $2,300 per car ($0.62/bu).

Owing to the $1,500 per car rate cut to the Texas Gulf beginning in September, the PNW-Texas Gulf tariff rate spreads will be even larger than the PNW-Mexico tariff rate spreads. The smallest spreads (western North Dakota) will be $750 per car ($0.20/bu), and the largest (in Hager City and several Kansas locales) will be around $3,000 per car ($0.81/bu).

Figure 2. BNSF Railway's soybean tariff rate spread between Pacific Northwest export terminals and U.S.-Mexico border, effective September 2025 (marketing year 2025/26)



Note: The tariff rate applies to 110-120 car shuttle trains composed of large covered hopper cars.
Source: U.S. Department of Transportation Bureau of Transportation Statistics, North American Rail Network. USDA/Agricultural Marketing Service analysis of BNSF Railway Tariff 4022; Items 69105-M and 69605.

Shifts in Soybean Demand Likely Informed Tariff Rate Changes

BNSF's adjustments to MY 2025/26 soybean shuttle tariff rates were likely influenced by changing demand for soybeans—both for domestic processing and international trade.

Higher Domestic Demand. As recently as MY 2020/21, soybean exports outweighed domestic soybean crushing. However, following recent U.S. energy policy changes, USDA's July *World Agricultural Supply and Demand Estimates (WASDE)* report projects domestic soybean crushing will rise—to a record 69.1 million metric tons (mmt) in MY 2025/26—to meet the demand for soybean oil use in biofuels production. If realized, domestic use will make up nearly 60 percent of total soybean use in MY 2025/26.

As more soybeans are crushed domestically (rather than exported), soybean rail carloads are likely to decline. However, railroads may offer more competitive rates to ship soybeans to crushing facilities. For example, earlier this year, BNSF offered temporary tariff rate reductions for soybeans shipped to a processing facility in Cherryvale, KS. This temporary reduction began in February and will end in September. During this period, soybean export demand is typically lower.

Shifts in Trade. Reflecting the shift from soybean exports to domestic crushing, USDA's July *WASDE* report projects total U.S. soybean exports for MY 2025/26 at 47.5 mmt—down from 50.8 mmt in MY 2024/25.

As reported by USDA's Foreign Agricultural Service for the week ending July 24, the current pace of MY 2025/26 soybean export sales is 68 percent behind the prior 5-year average for the same period. This sharp decline owes mainly to the delayed MY 2025/26 purchases of U.S. soybeans by China, which is typically the largest buyer of U.S. soybeans (GTR table 16). This year, China has yet to book its first sales—even later than last year when its first sales for MY 2024/25 were booked in early-July.

In the absence of China (so far), the largest known buyers for MY 2025/26 soybeans are currently Mexico (1.1 mmt) and Pakistan (0.4 mmt). Unknown destinations have received 1 mmt. Existing soybean sales are reflected in BNSF's tariff rate changes, which favor Mexico and the Texas Gulf over the PNW.

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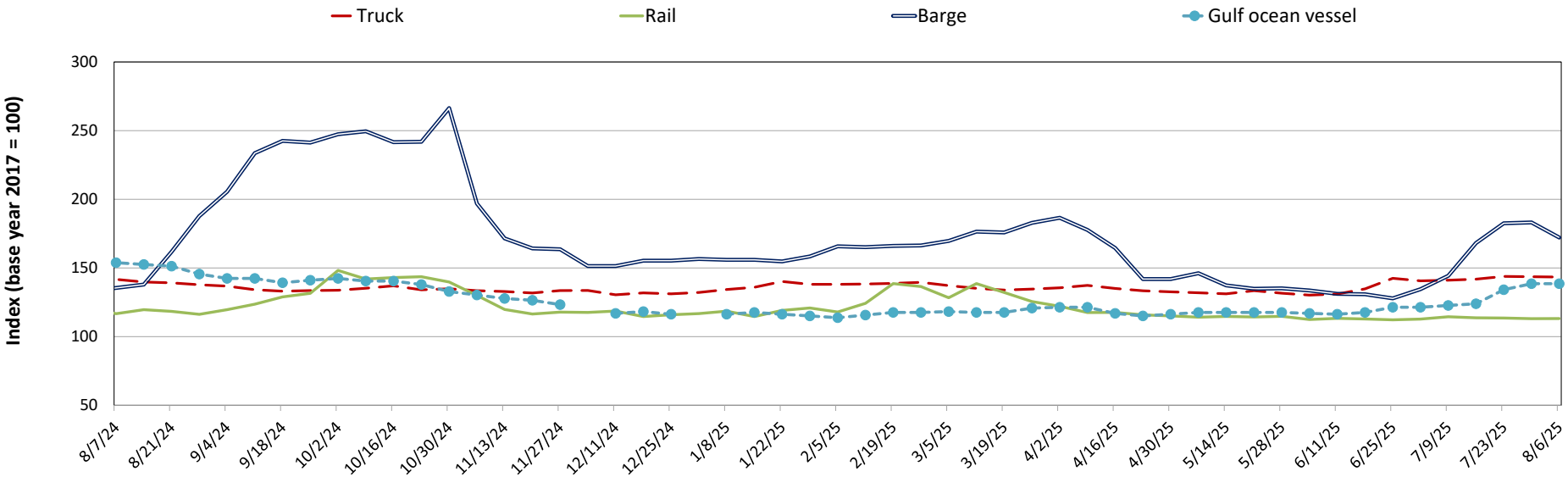
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
08/06/25	143	113	172	139	137
07/30/25	144	113	183	139	140
08/07/24	142	117	135	154	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.

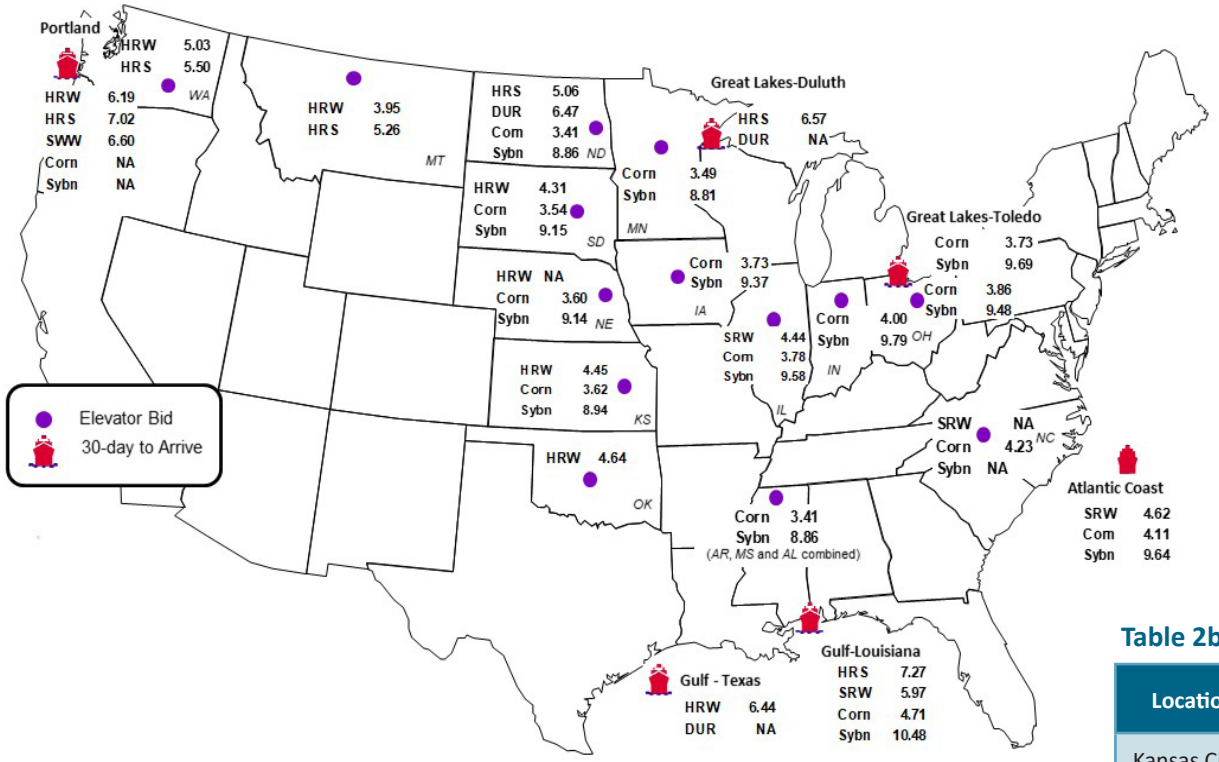
Figure 1. Grain transportation cost indicators as of week ending 8/6/25



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	8/1/2025	7/25/2025
Corn	IL–Gulf	-0.93	-1.04
Corn	NE–Gulf	-1.11	-1.21
Soybean	IA–Gulf	-1.11	-1.18
HRW	KS–Gulf	-1.99	-1.95
HRS	ND–Portland	-1.96	-1.90

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	8/1/2025	Week ago 7/25/2025	Year ago 8/2/2024
Kansas City	Wheat	Sep	5.186	5.262	5.472
Minneapolis	Wheat	Sep	5.723	5.848	5.950
Chicago	Wheat	Sep	5.168	5.38	5.252
Chicago	Corn	Sep	4.106	4.190	3.980
Chicago	Soybean	Sep	9.892	10.208	10.186

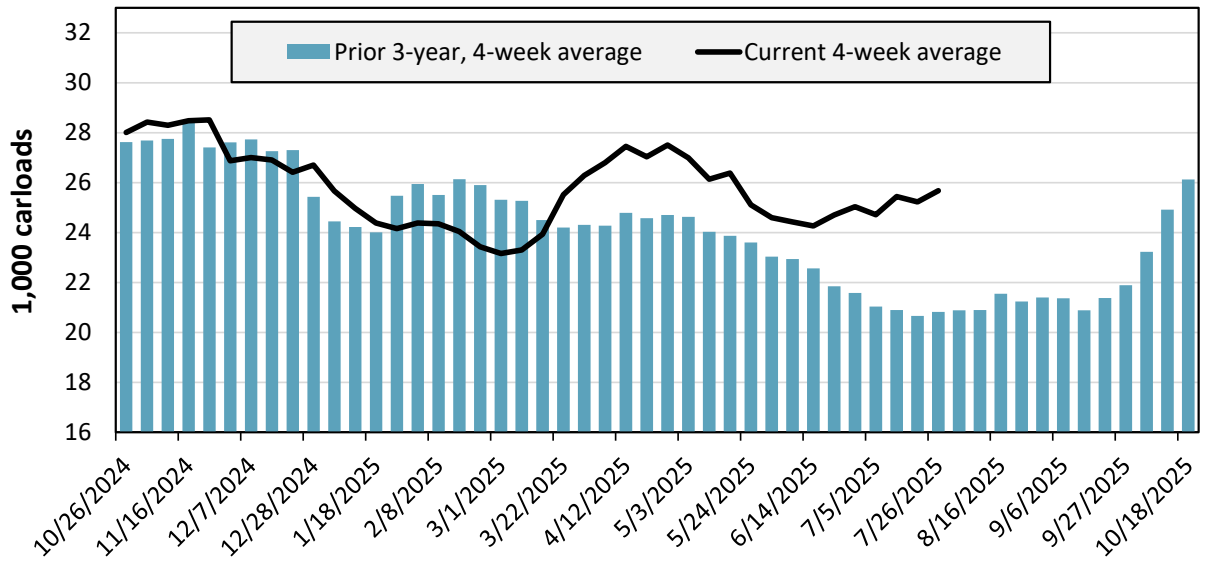
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 7/26/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,543	2,569	11,858	6,138	3,370	1,619	27,097
This week last year	1,595	2,902	10,718	5,450	3,035	1,133	24,833
2025 YTD	47,932	84,743	328,593	172,771	81,029	41,998	757,066
2024 YTD	49,720	79,958	312,813	153,770	81,477	27,820	705,558
2025 YTD as % of 2024 YTD	96	106	105	112	99	151	107
Last 4 weeks as % of 2024	79	100	114	121	116	146	113
Last 4 weeks as % of 3-yr. avg.	91	105	132	123	138	125	123
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 July 26, grain carloads were up 2 percent from the previous week, up 13 percent from last year, and up 23 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: 7/25/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	30.1	17.8	11.4	14.7	5.9	35.3	19.2
	Average over last 4 weeks	22.5	23.2	17.0	17.2	10.1	38.7	21.4
	Average of same 4 weeks last year	29.5	28.6	29.2	18.1	8.6	n/a	22.8
Average grain unit train speeds (miles per hour)	This week	23.2	20.5	23.8	21.9	24.9	15.6	21.7
	Average over last 4 weeks	22.8	19.6	24.7	22.5	24.1	14.8	21.4
	Average of same 4 weeks last year	23.4	20.8	24.5	22.3	24.4	n/a	23.1

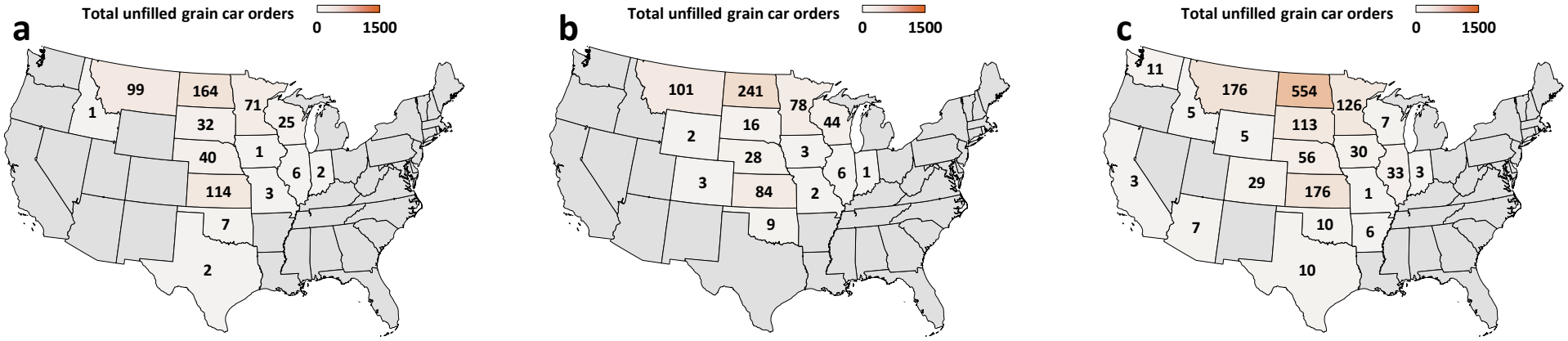
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 7/25/2025		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	13	2	216	68	13	343	655
	Average over last 4 weeks	17	11	235	65	11	335	674
	Average of same 4 weeks last year	11	9	510	107	6	n/a	642
Average number of loaded grain cars not moved in over 48 hours	This week	41	185	193	39	6	849	1,314
	Average over last 4 weeks	38	187	301	54	18	746	1,343
	Average of same 4 weeks last year	16	144	885	83	4	n/a	1,132
Average number of grain unit trains held	This week	0	0	4	5	0	8	18
	Average over last 4 weeks	0	0	4	5	0	8	18
	Average of same 4 weeks last year	0	1	23	6	0	n/a	30
Total unfilled manifest grain car orders	This week	2	0	287	111	0	203	603
	Average over last 4 weeks	2	1	309	101	0	224	637
	Average of same 4 weeks last year	4	0	995	164	1	n/a	1,163

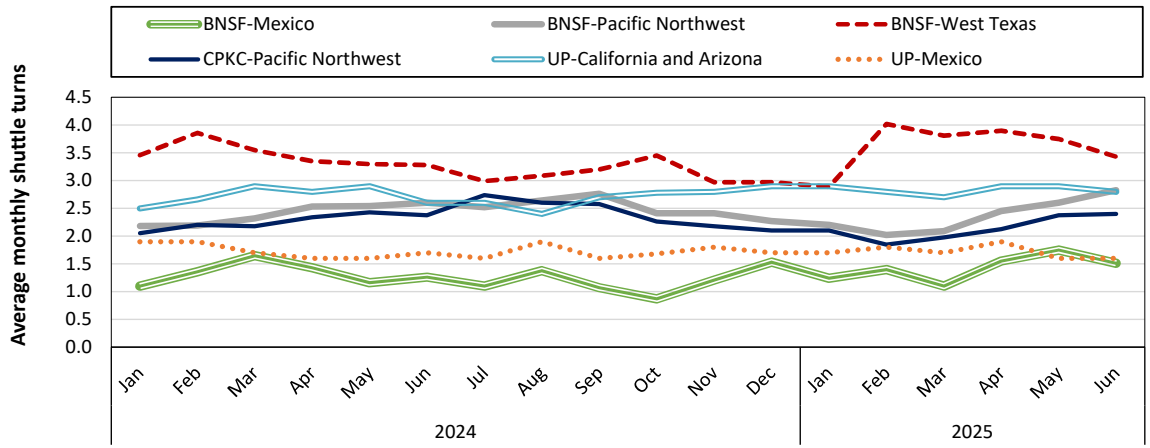
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 7/25/2025 (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

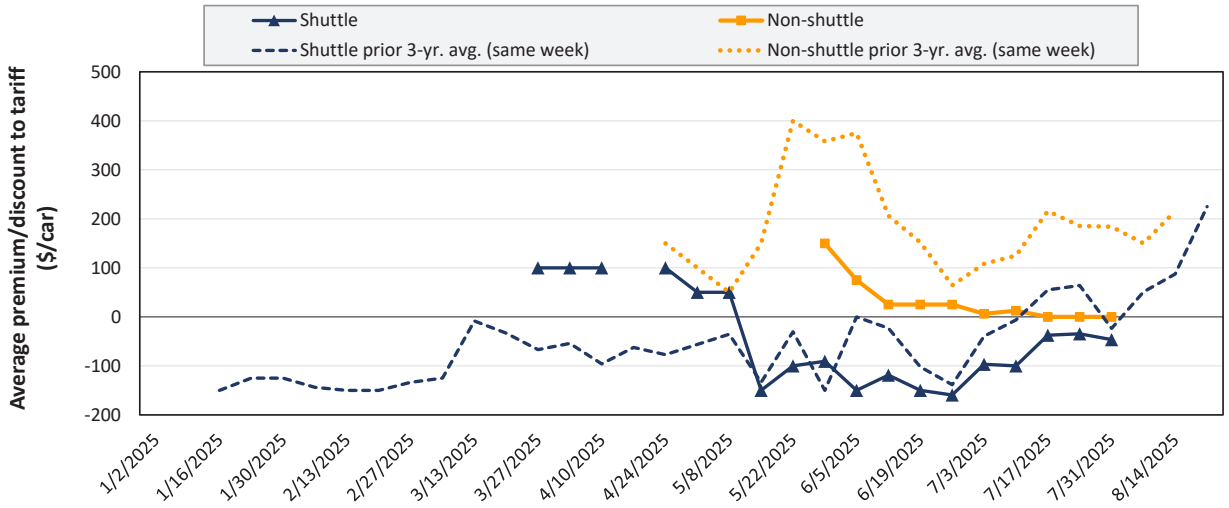


In June 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.8 to the Pacific Northwest, and 3.4 to West Texas. CPKC's shuttle turns averaged 2.4 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.8 to California and Arizona, and they averaged 1.6 to 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 August 2025



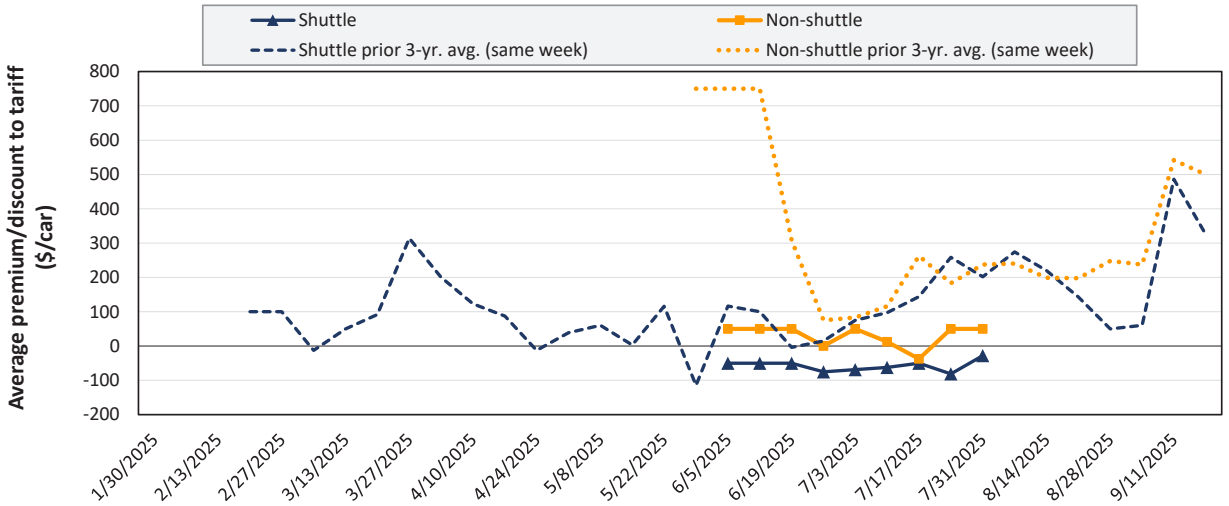
Average non-shuttle bids/offers are unchanged this week, and are $150 below the peak.

Average shuttle bids/offers fell $12 this week and are $146 below the peak.

7/31/2025	BNSF	UP
Non-Shuttle	$100	-$100
Shuttle	$0	-$93

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 September 2025



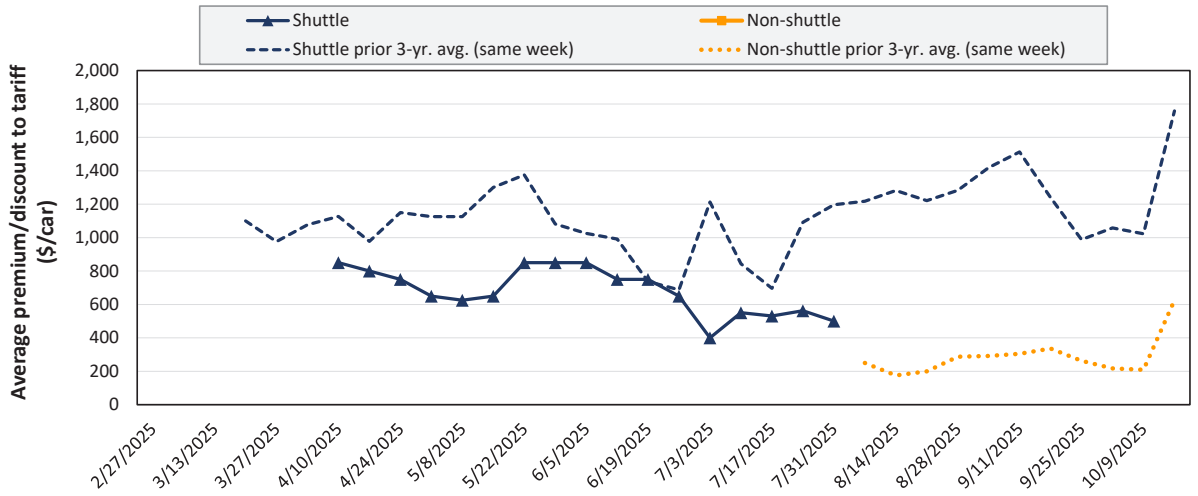
Average non-shuttle bids/offers are unchanged this week, and are at the peak.

Average shuttle bids/offers rose $53 this week and are at the peak.

7/31/2025	BNSF	UP
Non-Shuttle	$150	-$50
Shuttle	-$19	-$38

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 October 2025



There were no non-shuttle bids/offers this week.

Average shuttle bids/offers fell $63 this week and are $350 below the peak.

7/31/2025	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$700	$300

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

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

For the week ending: 7/31/2025		Delivery period					
		Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
Non-shuttle	BNSF	100	150	n/a	n/a	n/a	n/a
	Change from last week	50	50	n/a	n/a	n/a	n/a
	Change from same week 2024	-100	-75	n/a	n/a	n/a	n/a
	UP	-100	-50	n/a	n/a	n/a	n/a
	Change from last week	-50	-50	n/a	n/a	n/a	n/a
	Change from same week 2024	-350	-275	n/a	n/a	n/a	n/a
Shuttle	BNSF	0	-19	700	700	n/a	n/a
	Change from last week	-88	44	-175	n/a	n/a	n/a
	Change from same week 2024	-75	-338	-350	n/a	n/a	n/a
	UP	-93	-38	300	n/a	n/a	n/a
	Change from last week	63	63	50	n/a	n/a	n/a
	Change from same week 2024	-93	-63	-175	n/a	n/a	n/a
	CPKC	n/a	n/a	n/a	n/a	n/a	n/a
	Change from last week	n/a	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	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, August 2025

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	$5,832	$83.09	$5,915.09	$1.60	$58.74	2.4
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,291	$42.77	$4,333.77	$1.17	$43.04	4.1
	CPKC	Westby, MT	St. Louis, MO	Unit	$5,788	$500.22	$6,288.22	$1.70	$62.45	2.9
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,804	$49.77	$4,853.77	$1.31	$48.20	3.5
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,215	$105.07	$6,320.07	$1.71	$62.76	2.0
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,865	$20.58	$2,885.58	$0.78	$28.66	6.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,732	$107.03	$5,839.03	$1.58	$57.98	4.0
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,838	$88.69	$5,926.69	$1.60	$58.85	2.4
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,412	$72.66	$5,484.66	$1.48	$54.47	2.8
	CPKC	Minot, ND	Kalama, WA	Unit	$5,298	$442.89	$5,740.89	$1.55	$57.01	-3.7
	CPKC	Nekoma, ND	Chicago, IL	Manifest	$5,030	$266.18	$5,296.18	$1.43	$52.59	3.7
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$44.66	$3,444.66	$0.93	$34.21	-12.2
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$39.41	$3,639.41	$0.98	$36.14	-14.7
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$133.00	$5,933.00	$1.60	$58.92	-14.3
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$96.32	$5,796.32	$1.57	$57.56	-1.6
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$60.13	$4,260.13	$1.15	$42.31	-12.8
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$52.99	$4,052.99	$1.10	$40.25	-13.7
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$60.48	$3,560.48	$0.96	$35.36	-15.1
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$44.31	$3,744.31	$1.01	$37.18	-12.8
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$44.66	$3,944.66	$1.07	$39.17	-12.1
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$348.90	$4,873.90	$1.32	$48.40	-8.2
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$130.50	$5,097.50	$1.38	$50.62	1.6
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$172.20	$3,947.20	$1.07	$39.20	-9.6
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$229.50	$4,254.50	$1.15	$42.25	-9.0
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,791	$54.04	$4,845.04	$1.31	$48.11	3.4
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,439	$53.06	$4,492.06	$1.21	$44.61	3.7
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$23.31	$2,055.31	$0.56	$20.41	-0.8
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	$8,348	$0.00	$8,348.00	$2.26	$82.90	0.0
	CSX	Chicago, IL	Albany, NY	Unit	$7,413	$0.00	$7,413.00	$2.00	$73.61	0.0
	CSX	Chicago, IL	Buffalo, NY	Manifest	$5,924	$0.00	$5,924.00	$1.60	$58.83	0.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	$8,568	$0.00	$8,568.00	$2.32	$85.08	0.0

Note: Chicago, IL, serves as an interchange point between eastern and western Class I railroads. In the table above, all routes with Chicago as either an origin or destination are subject to "Rule 11"—meaning their rate must be combined with a tariff rate from another railroad. (For example, rates for Wichita, KS, to Albany, NY, would combine Wichita to Chicago and Chicago to Albany.) All rates (except Goodland, KS, to Kansas City, MO) are for railroad-owned, large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). The Goodland-to-Kansas City route is for small covered hoppers (C-113), which each carry 100 short tons (90.7 metric tons). A bushel of wheat weighs 60 pounds. Percentage change year to year (Y/Y) is calculated using the tariff rate plus fuel surcharge. DET = Domestic Efficiency Trains. DET trains—on BNSF Railway (BNSF) only—are composed of 110 cars loaded at a single origin and split en route to multiple destinations. For mileage calculations, BNSF uses "Seattle, WA" for all Pacific Northwest (PNW) locations and "Houston, TX" for all Texas Gulf locations. HRS = hard red spring. HRW = hard red winter. CPKC = Canadian Pacific Kansas City. CSX = CSX Transportation. UP = Union Pacific Railroad. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.
Source: BNSF, CPKC, CSX, and UP.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, August 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	4.4
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$117.88	$5,587.88	$1.41	$55.49	-4.0
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$124.32	$6,124.32	$1.54	$60.82	3.6
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$50.96	$5,090.96	$1.28	$50.56	5.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$123.13	$5,473.13	$1.38	$54.35	-4.2
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$65.45	$4,625.45	$1.17	$45.93	5.8
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$53.48	$4,853.48	$1.22	$48.20	5.7
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$65.59	$4,605.59	$1.16	$45.74	5.8
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$99.33	$5,529.33	$1.39	$54.91	-3.8
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$116.62	$5,546.62	$1.40	$55.08	-4.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.60	$23.58	8.8
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.69	$27.35	7.5
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,342	$44.40	$1,386.40	$0.35	$13.77	-0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,047	$509.36	$5,556.36	$1.40	$55.18	-3.0
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$490.14	$6,003.14	$1.51	$59.61	2.2
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$5,961	$0.00	$5,961.00	$1.50	$59.20	0.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,139	$0.00	$6,139.00	$1.55	$60.96	0.0
	CSX	Olney, IL	Fairmount, GA	Railroad	$4,706	$0.00	$4,706.00	$1.19	$46.73	0.0
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$207.30	$4,292.30	$1.08	$42.62	6.4
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$471.60	$6,476.60	$1.63	$64.32	3.7
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$521.10	$6,686.10	$1.69	$66.40	3.5
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$214.20	$5,219.20	$1.32	$51.83	5.2
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$352.80	$6,037.80	$1.52	$59.96	4.2
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$216.90	$4,441.90	$1.12	$44.11	6.2
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$106.96	$6,241.96	$1.69	$61.99	-3.5
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$6,685	$114.38	$6,799.38	$1.84	$67.52	-1.2
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$102.83	$6,187.83	$1.67	$61.45	-3.5
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$59.85	$3,459.85	$0.94	$34.36	-24.6
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$113.68	$6,298.68	$1.70	$62.55	-3.5
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.64	$23.58	9.1
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.74	$27.35	7.8
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,785	$509.36	$6,294.36	$1.70	$62.51	-2.7
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$389.31	$3,915.31	$1.06	$38.88	-0.5
	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	5.0
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$468.60	$6,608.60	$1.79	$65.63	3.7
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$323.40	$5,833.40	$1.58	$57.93	4.4
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$369.30	$5,959.30	$1.61	$59.18	4.3

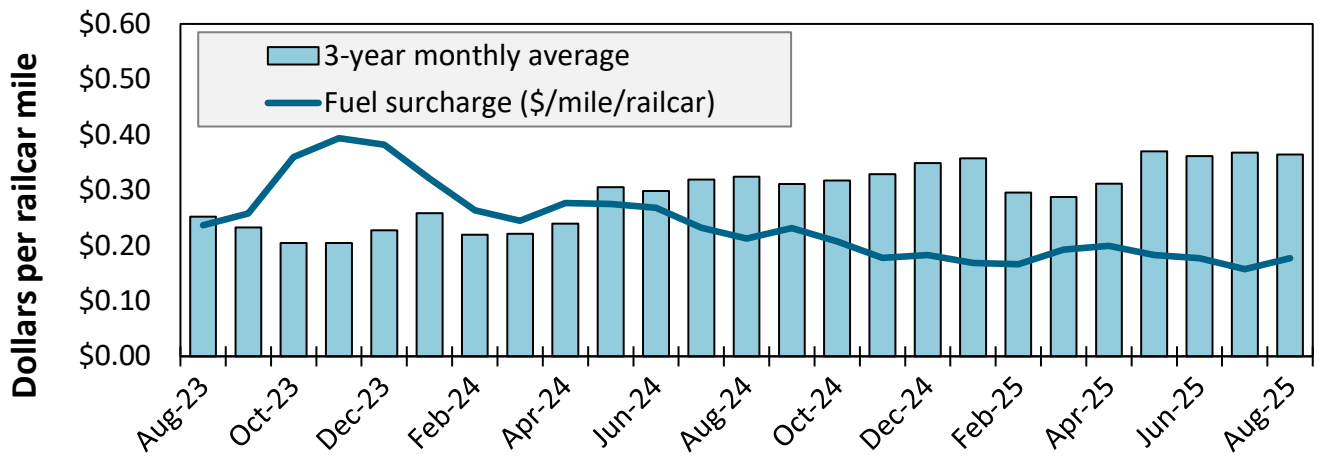
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage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

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, August 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	0.6	5.3
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,445	$53.59	$1.36	0.6	-
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$5,716	$56.26	$1.43	0.6	-
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,352	$52.67	$1.34	0.5	-
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,569	$54.81	$1.39	0.6	-
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,068	$49.88	$1.27	0.5	5.0
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,203	$51.21	$1.30	0.5	4.8
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,071	$49.91	$1.27	0.4	5.2
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,445	$53.59	$1.46	0.6	
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$5,401	$53.16	$1.45	0.4	-1.0
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,615	$65.11	$1.77	0.4	3.8
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$5,402	$53.17	$1.45	0.4	-1.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,352	$52.67	$1.43	0.5	-
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,717	$66.11	$1.80	0.4	3.7
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,087	$30.38	$0.83	0.8	-26.2
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,887	$28.41	$0.77	0.9	-23.0
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,373	$43.04	$1.17	0.4	-9.4
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,352	$52.67	$1.43	0.5	-
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,265	$41.98	$1.14	0.4	-7.5

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).

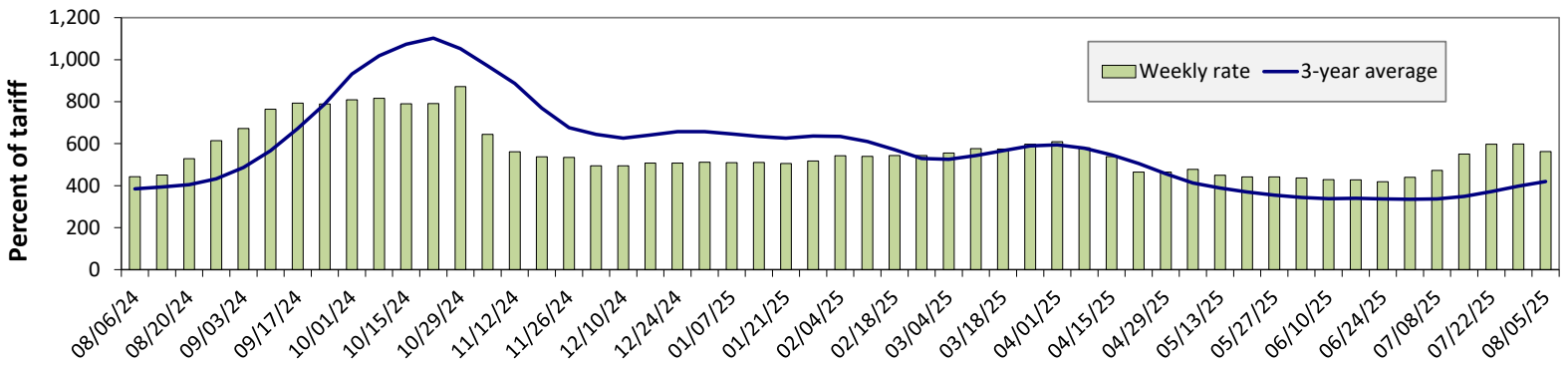
Figure 9. Railroad fuel surcharges, North American weighted average



August 2025: $0.18/mile, up 2 cents from last month’s surcharge of $0.16/mile; down 3 cents from the August 2024 surcharge of $0.21/mile; and down 18 cents from the August 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 August 5: 6 percent lower than the previous week; 27 percent higher than last year; and 34 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

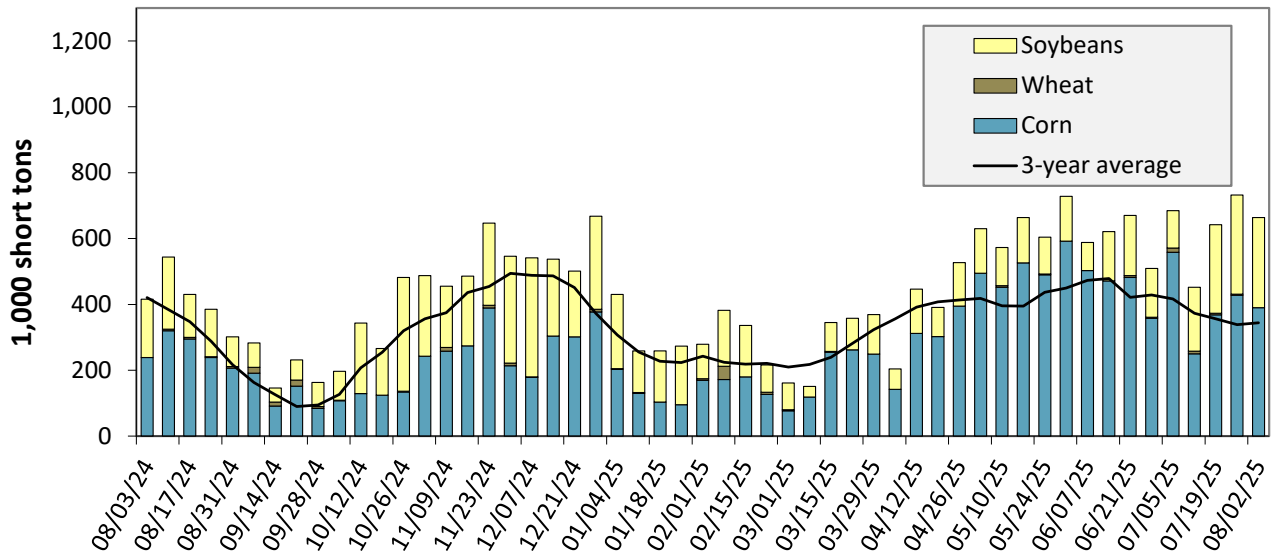
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	8/5/2025	620	591	563	459	461	401
	7/29/2025	640	624	599	473	471	425
$/ton	8/5/2025	38.38	31.44	26.12	18.31	21.62	12.59
	7/29/2025	39.62	33.20	27.79	18.87	22.09	13.35
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	8	26	27	31	3	32
	3-year avg.	22	33	34	33	17	25
Rate	September	766	743	730	702	721	761
	November	685	643	617	547	607	509

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 August 2: 60 percent higher than last year and 93 percent higher than the 3-year average.

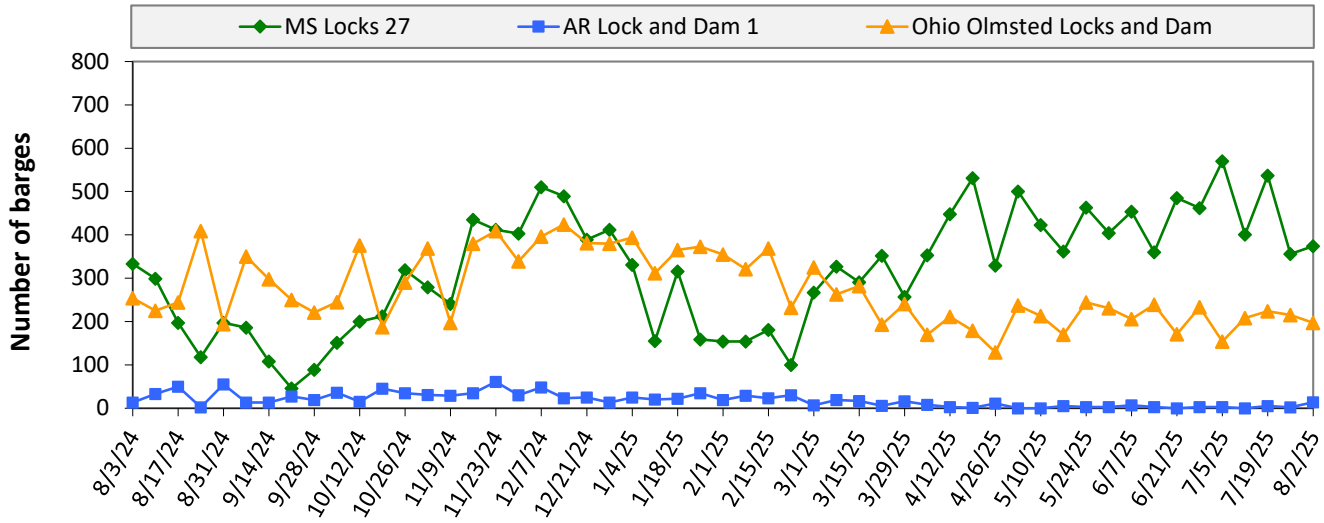
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/02/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	125	0	110	0	235
Mississippi River (Winfield, MO (L25))	202	0	155	0	357
Mississippi River (Alton, IL (L26))	334	0	242	0	577
Mississippi River (Granite City, IL (L27))	390	0	274	0	664
Illinois River (La Grange)	171	0	107	0	277
Ohio River (Olmsted)	40	11	36	5	92
Arkansas River (L1)	0	20	1	0	21
Weekly total - 2025	430	31	311	5	777
Weekly total - 2024	359	42	222	0	622
2025 YTD	12,607	742	6,532	125	20,006
2024 YTD	8,480	1,028	6,219	145	15,872
2025 as % of 2024 YTD	149	72	105	86	126
Last 4 weeks as % of 2024	137	98	206	339	155
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.

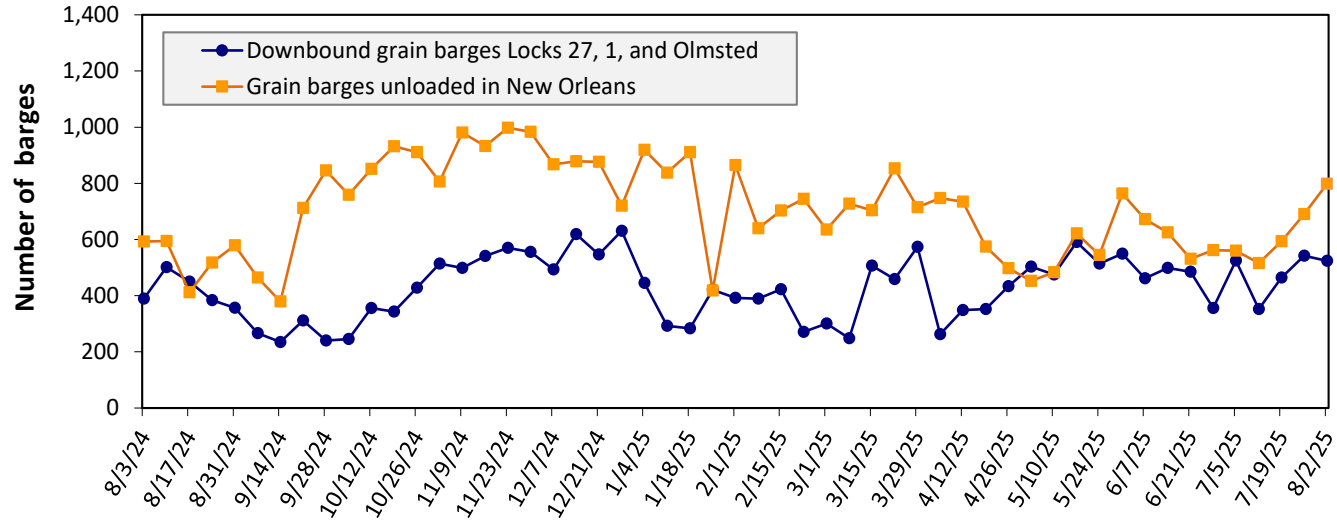
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 2: 585 barges transited the locks, 12 barges more than the previous week, and 23 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 August 2: 524 barges moved down river, 18 fewer than the previous week; 798 grain barges unloaded in the New Orleans Region, 16 percent more than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		August 2025	July 2025	August 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$23.06	$21.92	$21.78	5.9	4.2
	Central Ferry, WA/Almota, WA	$22.13	$21.02	$20.88	6.0	4.0
	Lyons Ferry, WA	$21.08	$20.01	$19.87	6.1	3.8
	Windust, WA/Lower Monumental, WA	$20.01	$18.98	$18.84	6.2	3.5
	Sheffler, WA	$19.98	$18.95	$18.81	6.2	3.5
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$18.74	$17.75	$17.61	6.4	3.2
	Port Kelly, WA/Wallula, WA	$18.51	$17.53	$17.39	6.4	3.2
	Umatilla, OR	$18.41	$17.43	$17.29	6.5	3.2
	Boardman, OR/Hogue Warner, OR	$18.14	$17.17	$17.03	6.5	3.1
	Arlington, OR/Roosevelt, WA	$17.98	$17.01	$16.87	6.6	3.1
	Biggs, OR	$16.60	$15.68	$15.54	6.8	2.6
	The Dalles, OR	$15.46	$14.58	$14.44	7.1	2.3

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

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

July, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	222	0	222
Columbia River (Bonneville Lock and Dam (L1))	279	0	279
Monthly total 2025	279	0	279
Monthly total 2024	403	0	403
2025 YTD	2,208	0	2,208
2024 YTD	1,740	0	1,740

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.

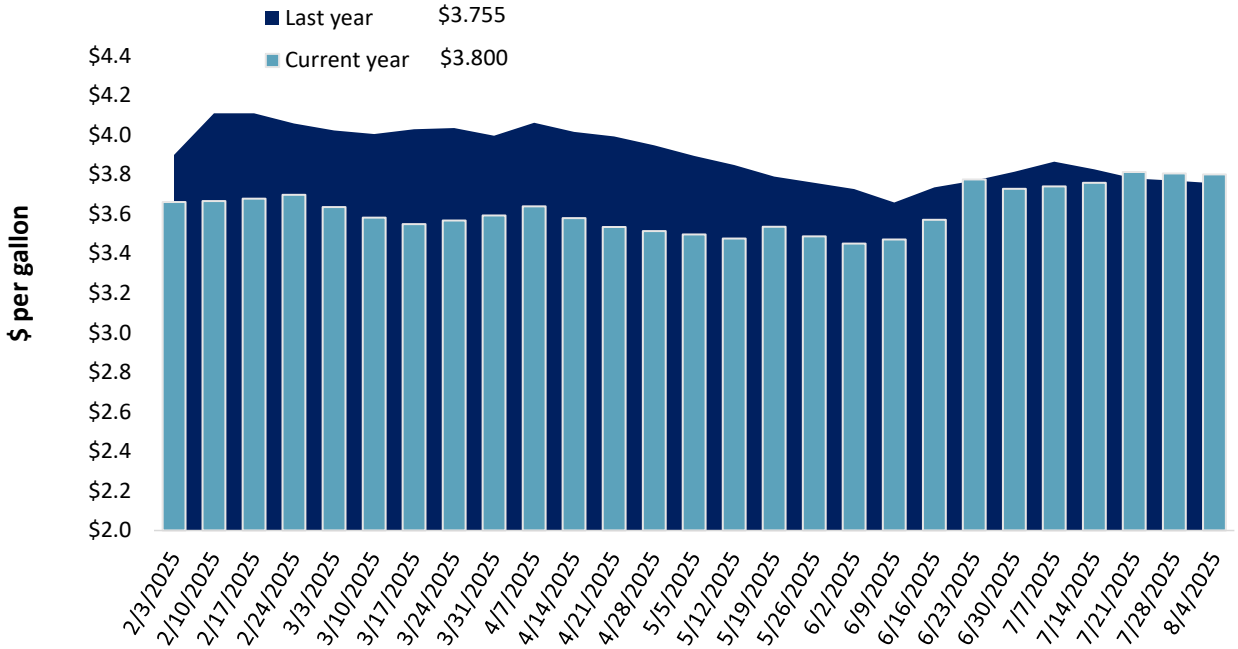
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 08/04/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.807	-0.005	-0.023
	New England	3.992	0.018	-0.081
	Central Atlantic	3.958	0.013	-0.033
	Lower Atlantic	3.733	-0.013	-0.009
II	Midwest	3.792	-0.002	0.063
III	Gulf Coast	3.442	-0.012	0.006
IV	Rocky Mountain	3.793	0.012	0.091
V	West Coast	4.540	-0.006	0.184
	West Coast less California	4.188	-0.001	0.237
	California	4.946	-0.011	0.125
Total	United States	3.800	-0.005	0.045

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 August 4, the U.S. average diesel fuel price decreased 0.5 cents from the previous week to $3.800 per gallon, 4.5 cents above the same week last year

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

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

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 7/24/2025	2,289	978	1,770	1,195	85	6,318	8,790	3,827	18,934
	This week year ago	1,333	845	1,957	1,131	131	5,397	6,803	3,115	15,314
	Last 4 wks. as % of same period 2023/24	167	124	90	86	68	113	149	130	132
Current shipped (cumulative) exports sales	2024/25 YTD	1,369	522	825	448	64	3,227	61,661	47,273	112,161
	2023/24 YTD	697	453	869	880	0	2,899	48,408	42,277	93,583
	YTD 2024/25 as % of 2023/24	196	115	95	51	0	111	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 7/24/2025	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	4,097	22,932	22,118	4	17,746
Japan	1384	13,237	10,968	21	9,366
China	0	33	2,819	-99	8,233
Colombia	243	7,466	6,116	22	4,383
Korea	470	6,200	2,415	157	1,565
Top 5 importers	6,194	49,868	44,436	12	41,293
Total U.S. corn export sales	8,614	70,451	55,211	28	51,170
% of YTD current month's export projection	13%	101%	96%	-	-
Change from prior week	1,892	341	168	-	-
Top 5 importers' share of U.S. corn export sales	72%	71%	80%	-	81%
USDA forecast July 2025	67,949	69,854	57,280	22	-
Corn use for ethanol USDA forecast, July 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 7/24/2025	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	24,411	-8	28,636
Mexico	1,101	5,214	4,865	7	4,917
Japan	176	2,084	2,169	-4	2,231
Egypt	0	3,560	1,561	128	2,228
Indonesia	59	1,989	2,128	-7	1,910
Top 5 importers	1,335	35,326	35,133	1	39,922
Total U.S. soybean export sales	3,034	51,100	45,391	13	51,302
% of YTD current month's export projection	6%	101%	98%	-	-
Change from prior week	429	349	252	-	-
Top 5 importers' share of U.S. soybean export sales	44%	69%	77%	-	78%
USDA forecast, July 2025	47,491	50,757	46,266	10	-

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

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

For the week ending 7/24/2025	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	1,600	1,349	19	3,358
Philippines	980	1,113	-12	2,473
Japan	728	670	9	2,045
China	0	141	-100	1,137
Korea	545	848	-36	1,674
Taiwan	396	343	15	935
Thailand	233	289	-19	667
Nigeria	375	150	150	629
Indonesia	440	353	25	518
Colombia	254	128	99	489
Top 10 importers	5,551	5,384	3	13,926
Total U.S. wheat export sales	9,545	8,296	15	19,135
% of YTD current month's export projection	41%	37%	-	-
Change from prior week	592	287	-	-
Top 10 importers' share of U.S. wheat export sales	58%	65%	-	73%
USDA forecast, July 2025	23,133	22,480	3	-

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.

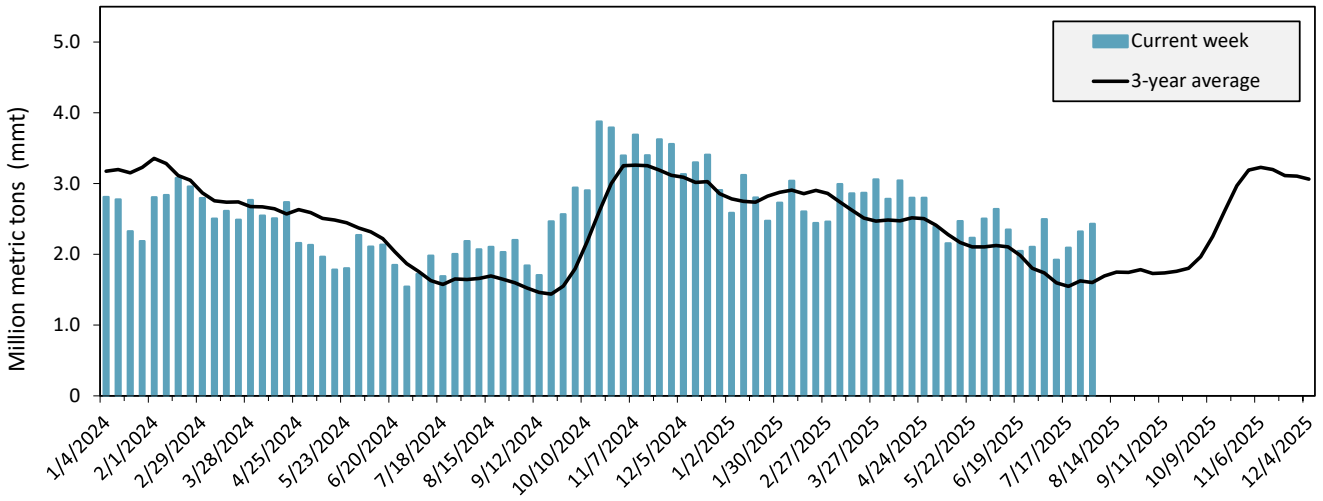
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 07/31/2025	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	198	450	44	14,684	11,133	132	125	252	13,987
	Soybeans	0	0	n/a	1,966	2,523	78	n/a	n/a	10,445
	Wheat	240	92	261	6,306	6,292	100	96	125	11,453
	All grain	448	542	83	23,072	21,033	110	114	185	37,186
Mississippi Gulf	Corn	670	669	100	22,064	15,631	141	107	135	27,407
	Soybeans	458	307	149	11,650	12,201	95	173	107	29,741
	Wheat	104	54	193	2,255	3,078	73	107	89	4,523
	All grain	1,231	1,071	115	36,009	30,965	116	121	120	61,789
Texas Gulf	Corn	0	22	0	214	310	69	129	124	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	166	88	188	2,597	978	266	294	483	1,940
	All grain	166	144	115	3,178	3,551	90	110	127	6,965
Interior	Corn	340	370	92	8,225	8,040	102	122	165	13,463
	Soybeans	143	118	121	3,960	4,227	94	92	115	8,059
	Wheat	71	53	134	1,818	1,753	104	117	136	2,989
	All grain	557	541	103	14,329	14,161	101	112	144	24,791
Great Lakes	Corn	0	21	0	41	0	n/a	n/a	243	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	17	0	n/a	155	238	65	27	53	653
	All grain	17	21	82	196	256	77	56	83	1,060
Atlantic	Corn	0	0	n/a	192	208	92	105	76	410
	Soybeans	12	3	458	481	438	110	986	118	1,272
	Wheat	1	3	50	44	23	193	82	46	73
	All grain	14	6	243	717	668	107	165	77	1,754
All Regions	Corn	1,208	1,532	79	45,420	35,321	129	116	164	56,109
	Soybeans	613	428	143	18,267	19,461	94	136	109	50,865
	Wheat	600	290	207	13,176	12,361	107	120	137	21,631
	All grain	2,432	2,324	105	77,606	70,688	110	116	137	134,016

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

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

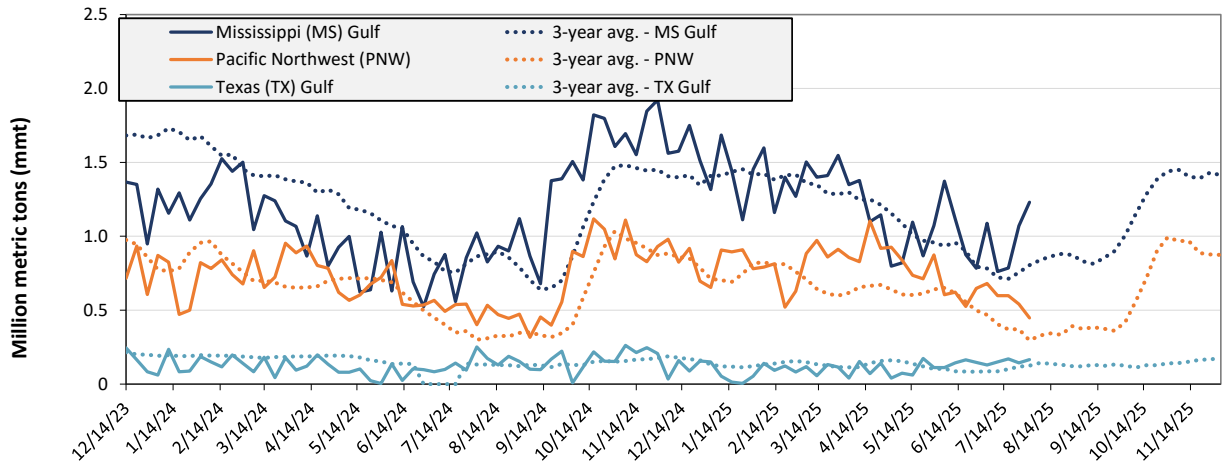
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jul. 31: 2.4 mmt of grain inspected, up 5 percent from the previous week, up 17 percent from the same week last year, and up 52 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 07/31/25 inspections (mmt):
MS Gulf: 1.23
PNW: 0.45
TX Gulf: 0.17

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 15	up 15	up 15	down 17
Last year (same 7 days)	up 21	down 30	up 11	up 28
3-year average (4-week moving average)	up 53	up 33	up 50	up 51

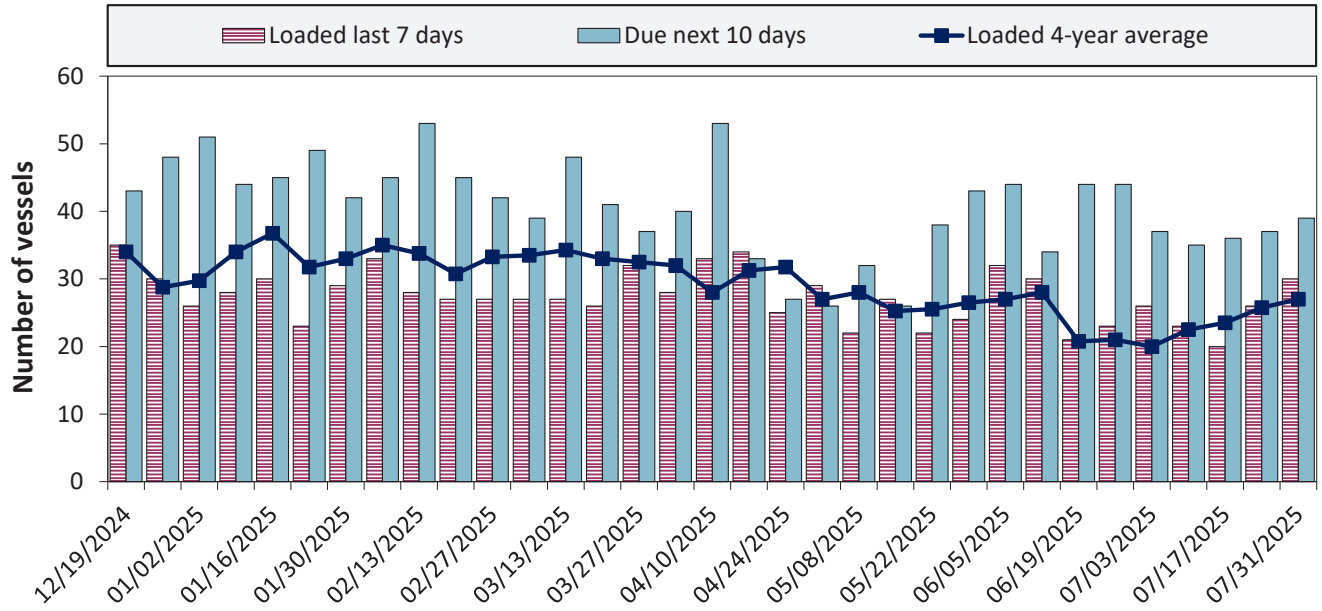
Source: USDA, Federal Grain Inspection Service.

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
7/31/2025	22	30	39	8
7/24/2025	26	26	37	10
2024 range	(11…45)	(18…38)	(29…61)	(3…25)
2024 average	28	28	45	13

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

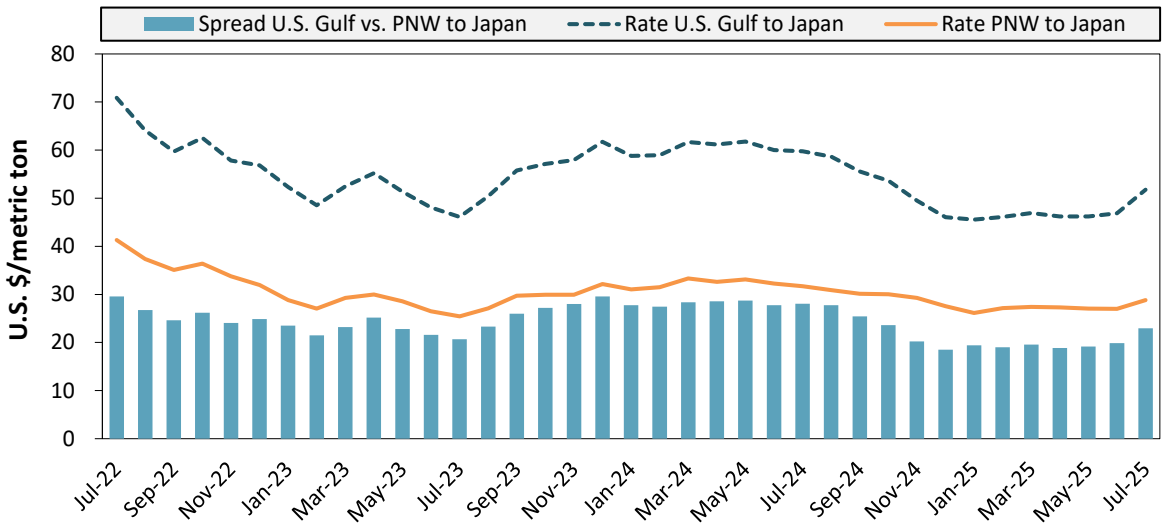
Figure 19. U.S. Gulf vessel loading activity



Week ending 07/31/25, number of vessels	Loaded	Due
Change from last year	15%	11%
Change from 4-year average	11%	19%

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
July 2025	$51.75	$28.80	$22.95
Change from July 2024	-13%	-9%	-18%
Change from 4-year average	-20%	-20%	-21%

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

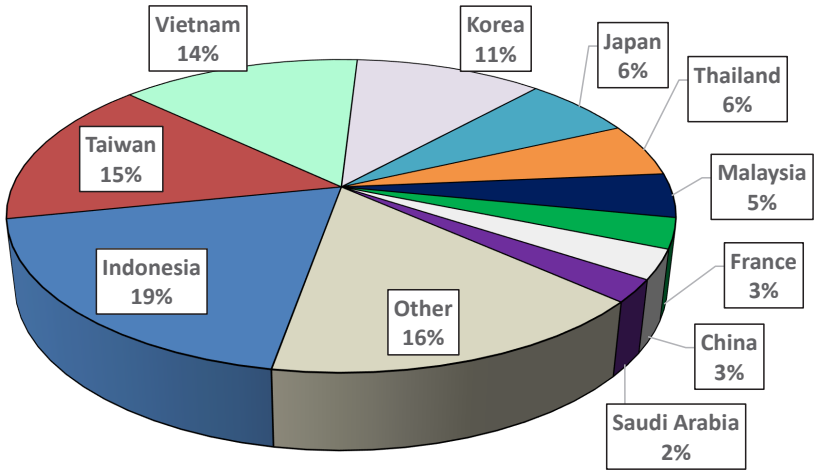
Table 20. Ocean freight rates for selected shipments, week ending 8/3/2025

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	Taiwan	Wheat	Jul 23, 2025	Sep 1/10, 2025	45,000	46.75
PNW	Taiwan	Wheat	Mar 28, 2025	May 1/10, 2025	50,000	39.75
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	N. China	Heavy grain	Jul 25, 2025	Aug 24/30, 2025	66,000	40.00
Brazil	N. China	Heavy grain	Jul 16, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	N. China	Heavy grain	Jul 15, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	N. China	Heavy grain	Jul 14, 2025	Aug 14/20, 2025	66,000	49.00
Brazil	China	Heavy grain	July 10, 2025	Aug 5/15, 2025	64,000	40.00
Brazil	China	Heavy grain	Jun 23, 2025	Jul 11/15, 2025	63,000	34.75
Brazil	China	Heavy grain	Jun 5, 2025	Jun 25/30, 2025	63,000	37.50
Brazil	China	Heavy grain	May 7, 2025	Jun 20/Jul 20, 2025	63,000	32.75

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

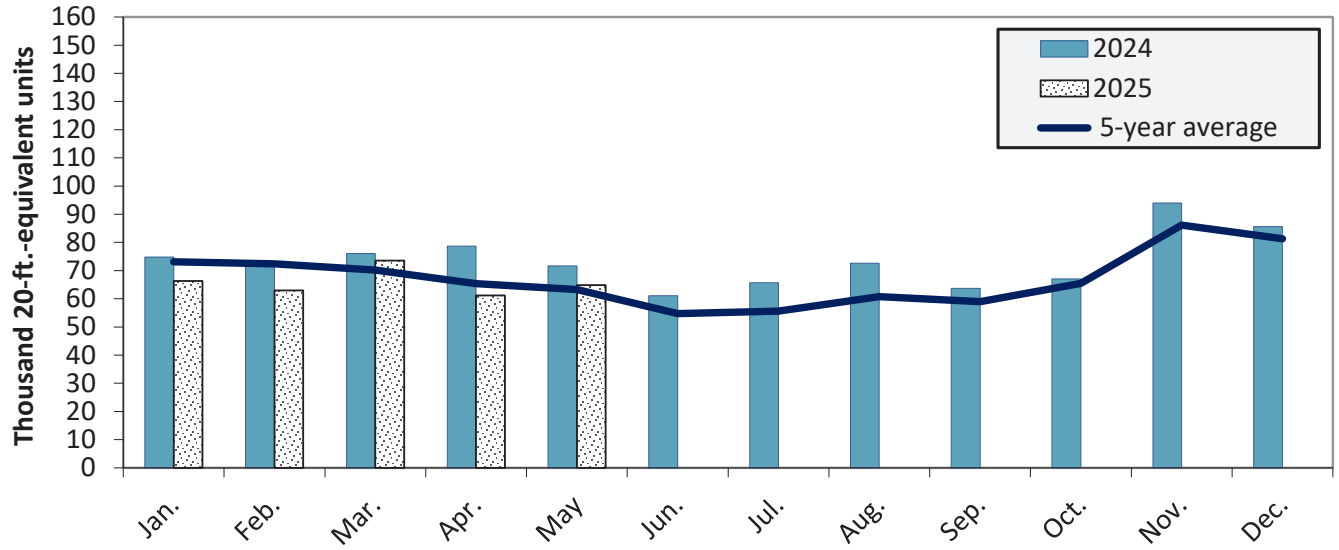
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-May 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 May 2025 were down 9.5 percent from last year but up 2.5 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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