



Grain Transportation Report

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White House Issues 90-Day Extension of Jones Act Waiver. Earlier this week, the U.S. President [extended a waiver](#) of Section 27 of the Merchant Marine Act of 1920—commonly referred to as the “Jones Act”—for another 90 days (until mid-November). The waiver enables foreign-flagged vessels to transport cargoes between U.S. ports, and it applies to shipments of energy and fertilizer products. First implemented in March, the waiver was later extended (for the first time) in April ([GTR, April 30, 2026, second highlight](#)).

Going forward, the White House will narrow the scope of the waiver. Specifically, rather than receiving a blanket exemption from the Jones Act’s requirements, voyages needing the waiver will now be considered case by case, on such criteria as whether a Jones Act-eligible ship is available.

Based on reports submitted to the [U.S. Maritime Administration](#) (as of August 12), 217 voyages have utilized the Jones Act waiver—carrying a wide range of products including crude oil, gasoline, renewable fuels, and diesel. Regarding fertilizer shipments, the waiver has been used to transport nearly 150,000 metric tons of anhydrous ammonia, as well as shipments of urea liquid fertilizer and monoammonium phosphate.

STB Seeks Information From BRC About “Concerning” Service Trends. On [August 3](#), the Surface Transportation Board (STB) wrote a letter to the Belt Railway of Chicago (BRC) seeking clarification on “concerning trends” in BRC’s service metrics. STB specifically

cited congestion at BRC’s clearing yard, where weekly railcar inventory had climbed 57 percent and dwell time, 72 percent, compared to last year. STB requested more service data and an explanation for BRC’s deteriorated service.

On [August 10](#), BRC attributed its worsening service trends to record-high traffic (up 8.4 percent year to date, from the same period last year). BRC also cited several external factors that temporarily reduced yard capacity this year, including severe weather events, crew shortages, a highway-rail accident, and multiple derailments.

To improve service, BRC plans to implement short-term measures—such as enforcing train-length limits, restricting extra inbound trains, adjusting shift structures, and coordinating closely with connecting carriers. BRC’s long-term measures include revising inbound quotas, reducing duplicative movements, expanding crew availability, and maintaining disciplined departure planning.

Anhydrous Ammonia Pipeline Tariff Rates Added to AgTransport. USDA’s Agricultural Marketing Service recently added a new [dataset](#) containing anhydrous ammonia pipeline tariff rates to the AgTransport open-data platform. In total, the new dataset provides pipeline rates between 5 origins (three in Louisiana, 1 in Arkansas, and 1 in Iowa) and 25 destinations (mostly in the Corn Belt).

The pipeline rates are also featured on the [Fertilizer transportation Dashboard](#). The charts show pipeline rates from Donaldsonville, LA (the largest nitrogen-producing plant in the

world); Taft, LA (a deepwater import facility); and Garner, IA (a facility that receives ammonia by rail, from Canada).

Anhydrous ammonia is used as a fertilizer, but also serves as the precursor to all nitrogen-based fertilizers. According to the Fertilizer Institute, about 60 percent of ammonia is moved by a single U.S. ammonia pipeline. [Sunoco LP](#) owns and operates the pipeline, which serves a wide swath of the Corn Belt.

FMCSA Extends Hours-of-Service Waiver for Hauling Feed. The Federal Motor Carrier Safety Administration (FMCSA) has [extended](#) Nebraska’s emergency hours-of-service waiver for a sixth time. Effective until September 11 (unless modified or terminated earlier by FMCSA), the waiver is intended to expedite transport of feed and other critical supplies.

FMCSA’s action is in response to Nebraska’s urgent need to haul livestock feed from ever greater distances. Wildfires have burned more than 1 million acres in Nebraska, and the State faces severe drought conditions. Motor carriers operating [under the waiver](#) must obtain the required over-dimension or overweight permits from Nebraska’s Department of Transportation, and the fees for these permits are also temporarily waived.

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 August 6, [unshipped balances](#) of corn and soybeans totaled 9.6 million metric tons (mmt), down 14 percent from last week and up 9 percent from the same time last year. The unshipped balance of wheat for MY 2026/27 was 3.99 mmt, down 6 percent from last week and down 41 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were 0.41 mmt, up significantly from last week. Net [soybean export sales](#) were 0.075 mmt, up 134 percent from last week. Net [wheat export sales](#) for marketing year 2026/27 were 0.26 mmt, down 14 percent from last week.

Rail

U.S. Class I railroads originated 27,840 [grain carloads](#) during the week ending August 1. This was a 1-percent increase from the previous week, 5 percent more than last year, and 30 percent more than the 3-year average.

Average August [shuttle secondary railcar bids/offers](#) (per car) were \$83 above tariff for the week ending August 6. This was \$6 more than last week and \$217 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$44 above tariff. This was \$67 less than last week and \$31 lower than this week last year.

Barge

For the week ending August 8, [barged grain movements](#) totaled 716,850 tons. This was 11 percent less than the previous week and 16 percent less than the same week last year.

For the week ending August 8, 460 [barges moved down river](#), 67 fewer than the previous week. There were 724 grain barges unloaded in the New Orleans region, 21 percent more than the previous week.

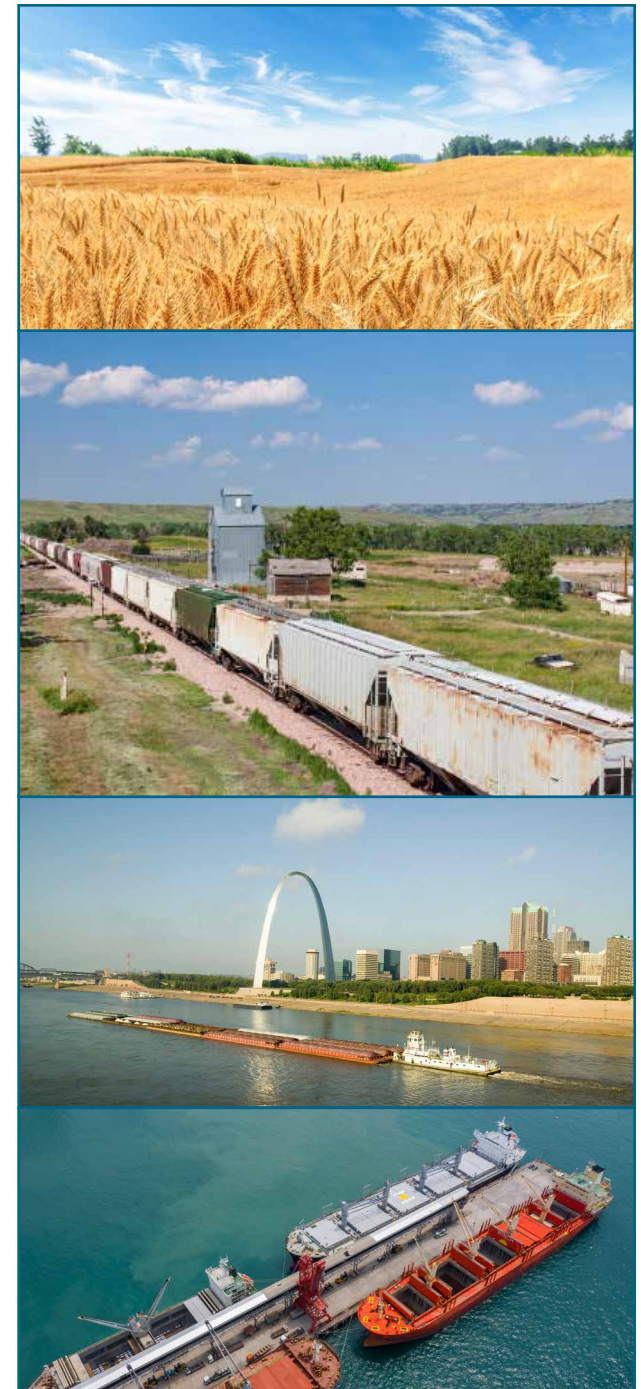
Ocean

For the week ending August 6, 33 [oceangoing grain vessels](#) were loaded in the Gulf—14 percent more than the same period last year. Within the next 10 days (starting August 7), 30 vessels were expected to be loaded—9 percent fewer than the same period last year.

As of August 6, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$71.50, up 3 percent from the previous week. The rate from the Pacific Northwest to Japan was \$36.75 per mt, up 1 percent from the previous week.

Fuel

For the week ending August 10, the [U.S. average diesel fuel price](#) decreased 9.1 cents from the previous week to \$5.257 per gallon, 150.3 cents above the same week last year.



Landed Costs of Grain to Mexico Rose From First to Second Quarter 2026

Given Mexico's status as a major buyer of U.S. grain, low landed costs (transportation costs + farm values) for U.S.-Mexico routes are vital to the competitiveness of U.S. grain (corn,

soybeans, and wheat) in Mexico and globally. This article examines the costs of transporting U.S. grain to Mexico over land to various

U.S.-Mexico border locations (land routes) and by sea to Veracruz (water routes), tracking changes over time (table 1, [figs. 1](#) and [2](#)).

Table 1. Quarterly costs of transporting U.S. grain to Veracruz, Mexico, and U.S.-Mexico border locations

Cost	Water route (to Veracruz) \$/metric ton					Land route (to U.S.-Mexico border locations) \$/metric ton				
	2025 2nd qtr.	2026 1st qtr.	2026 2nd qtr.	% change yr. to yr.	% change qtr. to qtr.	2025 2nd qtr.	2026 1st qtr.	2026 2nd qtr.	% change yr. to yr.	% change qtr. to qtr.
	CORN									
	Illinois origin					Iowa origin				
Truck	18.07	17.63	18.71	3.5	6.1	6.49	7.26	7.27	12.0	0.1
Rail	-	-	-	-	-	59.84	59.99	63.72	6.5	6.2
Barge	24.29	34.22	29.92	23.2	-12.6	-	-	-	-	-
Ocean	13.35	15.73	21.45	60.7	36.4	-	-	-	-	-
Total transportation cost	55.71	67.58	70.08	25.8	3.7	66.33	67.25	70.99	7.0	5.6
Farm value	180.44	165.21	175.58	-2.7	6.3	180.31	164.43	170.59	-5.4	3.7
Landed cost	236.15	232.79	245.66	4.0	5.5	246.64	231.68	241.58	-2.1	4.3
Transport % of landed cost	24	29	29	5	-1	27	29	29	2	0
Cost	Water route (to Veracruz) \$/metric ton					Land route (to U.S.-Mexico border locations) \$/metric ton				
	2025 2nd qtr.	2026 1st qtr.	2026 2nd qtr.	% change yr. to yr.	% change qtr. to qtr.	2025 2nd qtr.	2026 1st qtr.	2026 2nd qtr.	% change yr. to yr.	% change qtr. to qtr.
	SOYBEANS									
	Illinois origin					Missouri origin				
Truck	18.07	17.63	18.71	3.5	6.1	6.49	7.26	7.27	12.0	0.1
Rail	-	-	-	-	-	53.41	43.50	45.78	-14.3	5.2
Barge	24.29	34.22	29.92	23.2	-12.6	-	-	-	-	-
Ocean	13.35	15.73	21.45	60.7	36.4	-	-	-	-	-
Total transportation cost	55.71	67.58	70.08	25.8	3.7	59.90	50.76	53.05	-11.4	4.5
Farm value	388.26	391.93	426.23	9.8	8.8	384.58	398.06	426.23	10.8	7.1
Landed cost	443.97	459.51	496.31	11.8	8.0	444.48	448.82	479.28	7.8	6.8
Transport % of landed cost	13	15	14	2	-1	13	11	11	-2	0

Table 1 continues on page 5

Table 1 continues from page 4

Cost	Water route (to Veracruz) \$/metric ton					Land route (to U.S.-Mexico border locations) \$/metric ton				
	2025 2nd qtr.	2026 1st qtr.	2026 2nd qtr.	% change yr. to yr.	% change qtr. to qtr.	2025 2nd qtr.	2026 1st qtr.	2026 2nd qtr.	% change yr. to yr.	% change qtr. to qtr.
	WHEAT									
	Illinois origin					Kansas origin				
Truck	18.07	17.63	18.71	3.5	6.1	6.49	7.26	7.27	12.0	0.1
Rail	-	-	-	-	-	44.07	42.51	44.20	0.3	4.0
Barge	15.31	24.06	18.87	23.3	-21.6	-	-	-	-	-
Ocean	13.35	15.73	21.45	60.7	36.4	-	-	-	-	-
Total transportation cost	46.73	57.42	59.03	26.3	2.8	50.56	49.77	51.47	1.8	3.4
Farm value	200.25	195.97	214.09	6.9	9.2	183.96	176.25	209.81	14.1	19.0
Landed cost	246.98	253.39	273.12	10.6	7.8	234.52	226.02	261.28	11.4	15.6
Transport % of landed cost	19	23	22	3	-1	22	22	20	-2	-2

Note: In 2022, because of tax changes in Mexico, all three Class I railroads that ship from the United States to Mexico (BNSF, Union Pacific, and Kansas City Southern) report only rates to the border for interchange, called Rule 11 rates. The estimated total includes the estimated tariff through-rate for shuttle train service to U.S.-Mexico border locations and the reported fuel surcharge. The estimated rate does not include any additional costs for shuttle car service. Rates may be revised from what were previously published. Source for ocean freight rates: O'Neil Commodity Consulting/World Perspectives, Inc. Reflecting the current market condition, 2nd quarter 2026 ocean rates are estimated for 30-35,000 mt vessel size category as opposed to 35-40,000 mt used in prior quarters. Source for farm values: USDA, National Agricultural Statistics Service. Landed cost is total transportation cost plus farm value. "-" signifies "not applicable." Total may not add exactly because of rounding.

Source: Compiled by USDA, Agricultural Marketing Service.

Quarter-to-Quarter Transportation

Costs. From first quarter 2026 to second quarter 2026 (quarter to quarter), total transportation costs rose for all grains shipped by water and land routes. Rising water-route shipping costs for all grains reflected higher truck, rail, and ocean freight rates.¹ Only barge rates declined.

Truck rates rose as truck availability declined and diesel fuel prices increased ([Grain Truck and Ocean Rate Advisory, second quarter 2026](#), and [Grain Transportation Report \(GTR\) fig 16](#)). Higher rail rates partly reflected record-high fuel surcharges as diesel prices soared ([GTR, July 30, 2026](#)). Barge rates showed their typical

seasonal decline after the Upper Mississippi River (UMR) reopened from its annual winter closure in late March.² Ocean freight rates for shipping bulk items, including grain, rose partly because of strong cargo demand and rising bunker fuel costs ([GTR, July 30, 2026](#)).

Land-route shipping costs for all grains increased mainly because of rising rail rates (public tariff, plus fuel surcharge).

Year-to-Year Transportation Costs. From second quarter 2025 to second quarter 2026 (year to year), total costs of shipping corn, soybeans, and wheat to Mexico by the water routes rose, because of increases in truck, barge,

and ocean freight rates. For land-route corn and wheat, higher transportation costs reflected higher truck and rail rates. However, for land-route soybeans, lower rail rates pushed down transportation costs.

Quarter-to-Quarter Landed Costs. Quarter to quarter—for water- and land-route corn, soybeans, and wheat—landed costs increased because of rises in both transportation costs and farm values.

The share of landed costs comprising transportation was 14-29 percent for the water routes and 11-29 percent for the land routes. For corn and soybeans by the water route and

1 Water routes typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.

2 Repositioning empty barges is easier when UMR is open, and because shippers have improved access to barges, barge rates fall.

wheat by both routes, transportation's share of landed costs fell. For corn and soybeans by the land route, transportation's share of landed costs held steady.

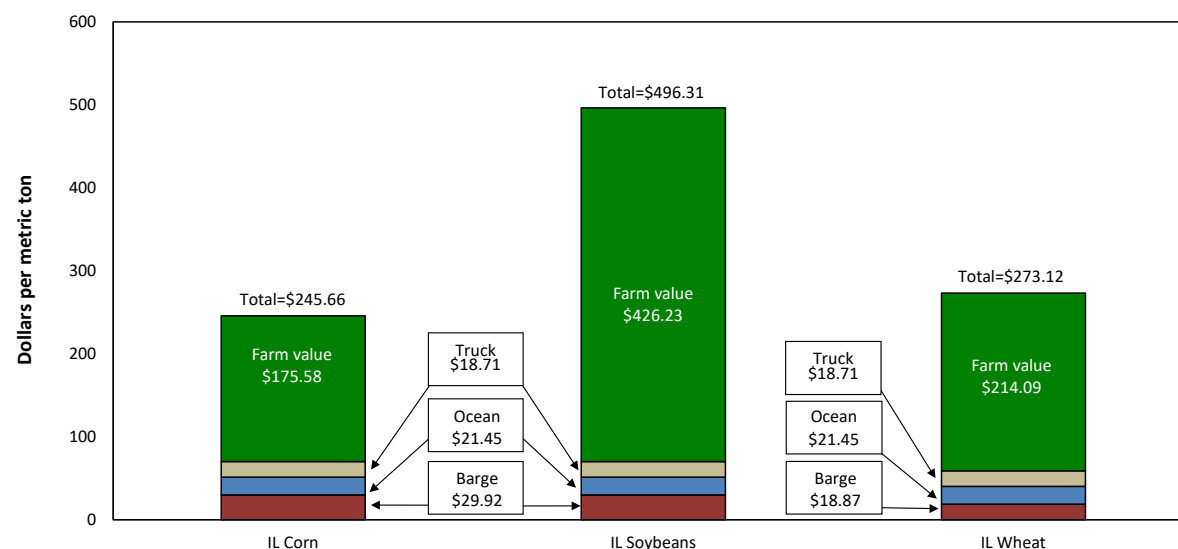
Year-to-Year Landed Costs. Year to year, landed costs rose for all route/grain combinations, except land-route corn. For soybeans by the water route and wheat by both routes, higher transportation costs and farm values pushed up landed costs. For water-route corn, landed costs rose because higher transportation costs outweighed lower farm values.

For corn shipped by the land route, landed costs fell because falling farm values outweighed rising transportation costs. For land-route soybeans, landed costs rose because higher farm values outweighed falling transportation costs.

U.S. Exports to Mexico. According to [USDA's Foreign Agricultural Service's Global Agricultural Trade System data](#), in second quarter 2026, the United States exported the following volumes to Mexico (with quarter-to-quarter changes): 6.32 million metric tons (mmt) of corn (up 4 percent); 1.02 mmt of soybeans (down 7 percent); and 1.08 mmt of wheat (up 1 percent). Year to year, U.S. exports to Mexico were down 8 percent for corn, unchanged for soybeans, and up 5 percent for wheat.

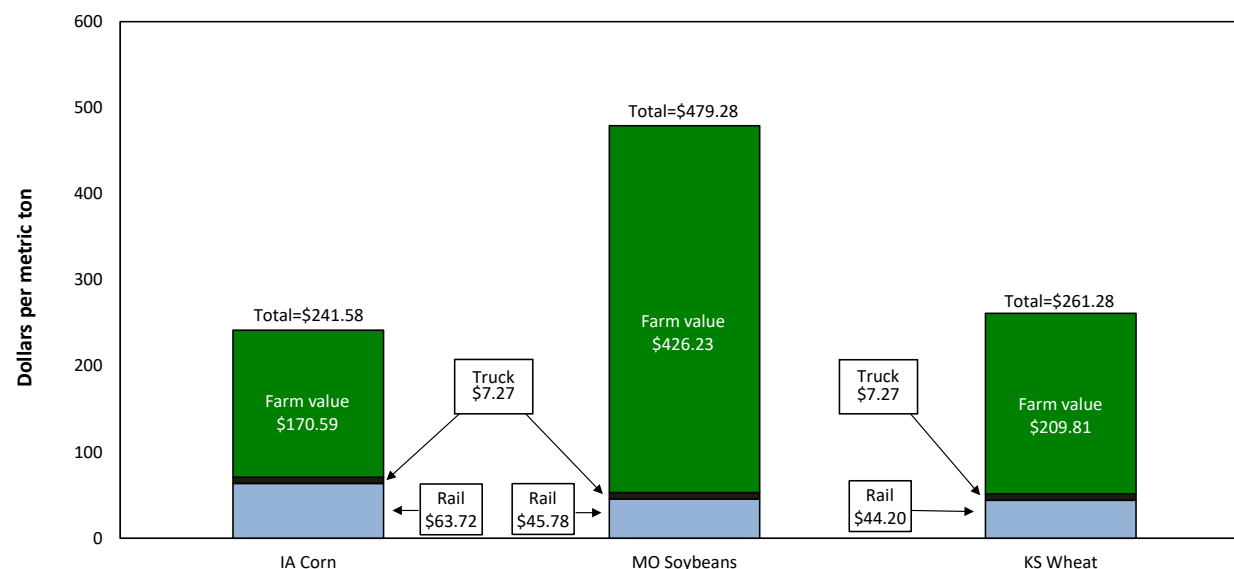
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Figure 1. Second-quarter 2026 water-route landed costs to Veracruz, Mexico



Note: IL = Illinois.
Source: USDA, Agricultural Marketing Service.

Figure 2. Second-quarter 2026 land-route landed costs to U.S.-Mexico border locations



Note: IA = Iowa; MO = Missouri; KS = Kansas.
Source: USDA, Agricultural Marketing Service.

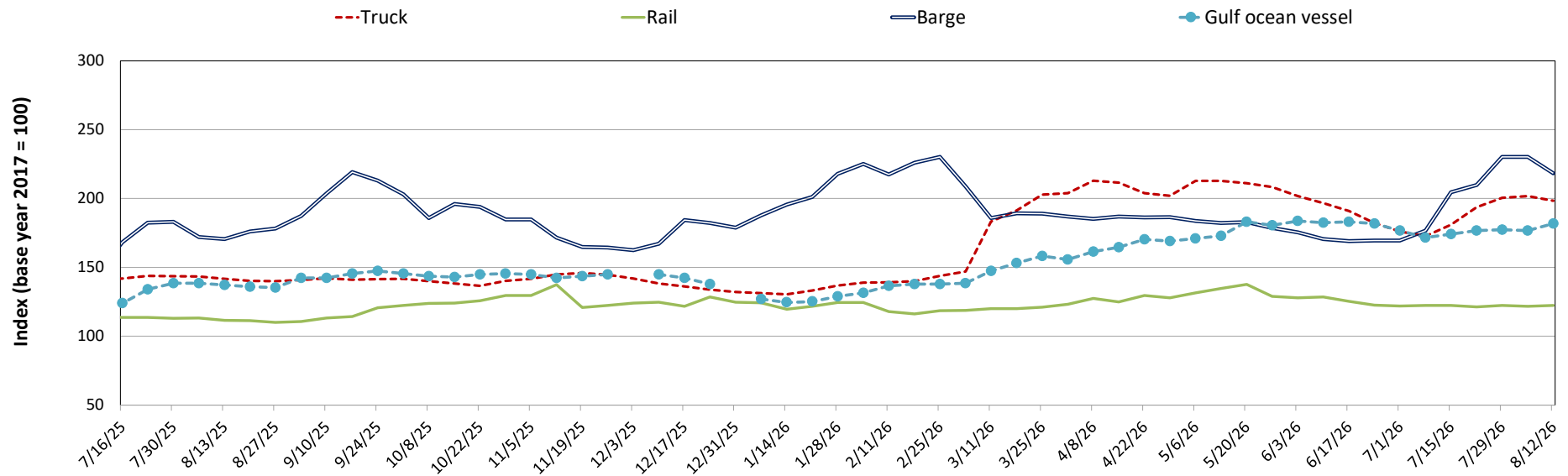
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
08/12/26	198	122	218	182	175
08/05/26	202	122	230	177	172
08/13/25	142	112	171	137	137

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 08/12/26



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

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

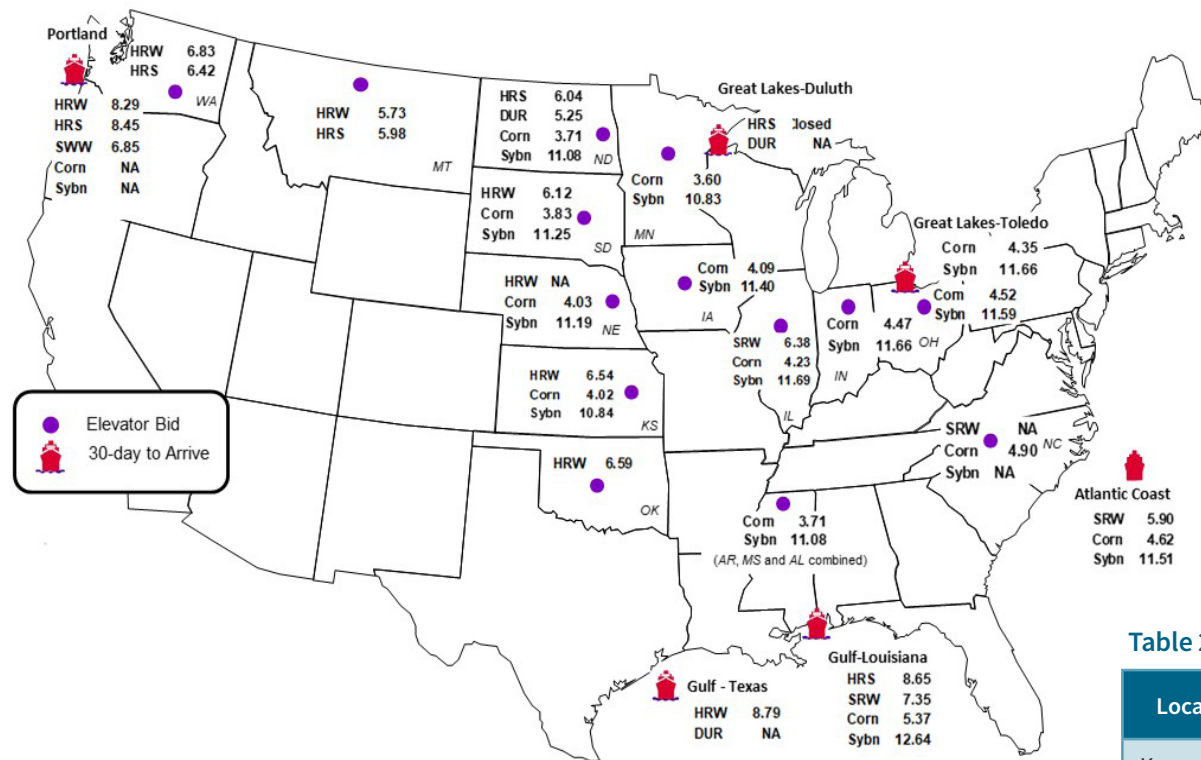


Table 2a. Market update: U.S. origins to export position price spreads (\$/bushel)

Commodity	Origin-destination	8/7/2026	7/31/2026
Corn	IL-Gulf	-1.14	-1.22
Corn	NE-Gulf	-1.34	-1.45
Soybean	IA-Gulf	-1.24	-1.42
HRW	KS-Gulf	-2.25	-2.17
HRS	ND-Portland	-2.41	-2.28

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	8/7/2026	Week ago 07/31/2026	Year ago 8/8/2025
Kansas City	Wht	Sep	7.444	7.072	5.180
Minneapolis	Wht	Sep	6.795	6.898	5.768
Chicago	Wht	Sep	6.620	6.412	5.144
Chicago	Corn	Sep	4.672	4.638	4.056
Chicago	Sybn	Sep	11.900	11.872	9.874

Sources: Chicago Mercantile Exchange (CME) Group Grain and Oilseed Futures Report.

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: For U.S. inland data: GeoGrain, and USDA, Agricultural Marketing Service (AMS), *Market News Report*. For corn & soybean export bids: USDA, AMS, *Export Grain Bids Report*. For wheat bids: U.S. Wheat Associates, *Weekly Wheat Report*.

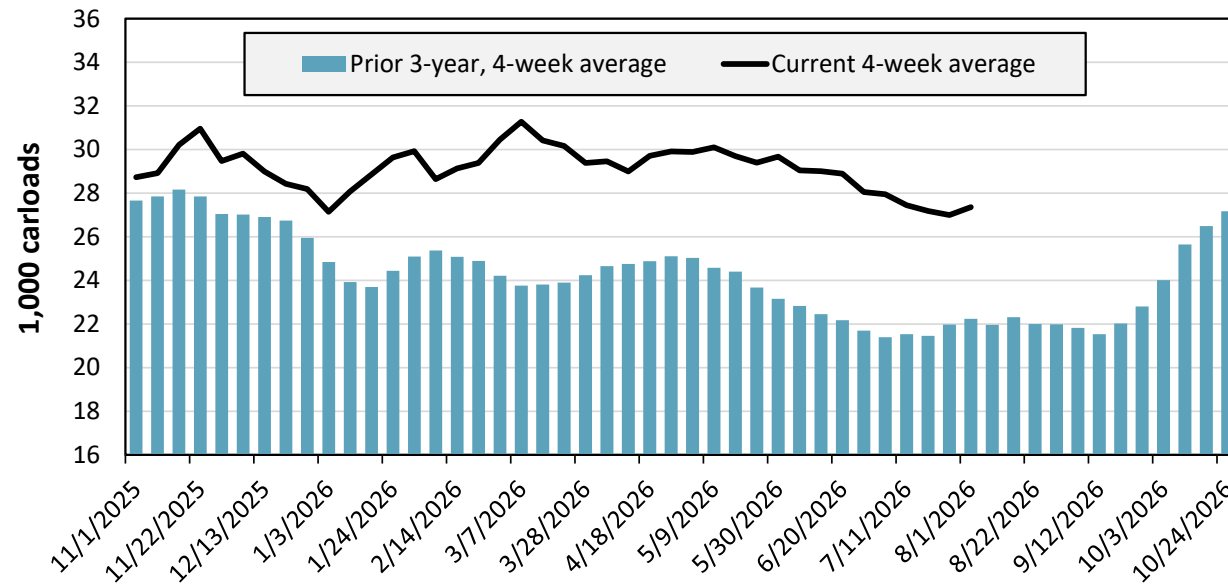
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 8/01/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,967	2,986	12,160	5,396	3,832	1,499	27,840
This week last year	1,434	2,413	11,585	6,125	3,445	1,592	26,594
2026 YTD	45,591	78,544	387,910	204,004	108,509	51,472	876,030
2025 YTD	49,366	87,156	340,178	178,896	84,474	43,590	783,660
2026 YTD as % of 2025 YTD	92	90	114	114	128	118	112
Last 4 weeks as % of 2025	110	98	103	94	117	110	103
Last 4 weeks as % of 3-yr. avg.	107	103	128	112	148	142	123
Total 2025	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018

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. CSX = CSX Transportation; NS = Norfolk Southern; BNSF = BNSF; Railway 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 August 1, grain carloads were up 1 percent from the previous week, up 3 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: 7/31/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	18.6	24.5	29.2	19.5	3.7	18.9	19.1
	Average over last 4 weeks	33.8	27.4	27.1	18.6	7.7	14.5	21.5
	Average of same 4 weeks last year	28.6	22.8	15.1	16.2	9.5	38.4	21.8
Average grain unit train speeds (miles per hour)	This week	22.5	19.5	23.4	22.4	23.9	17.0	21.4
	Average over last 4 weeks	23.1	18.7	23.2	23.1	24.1	18.9	21.8
	Average of same 4 weeks last year	23.1	19.8	24.4	22.4	24.0	15.3	21.5

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City.

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

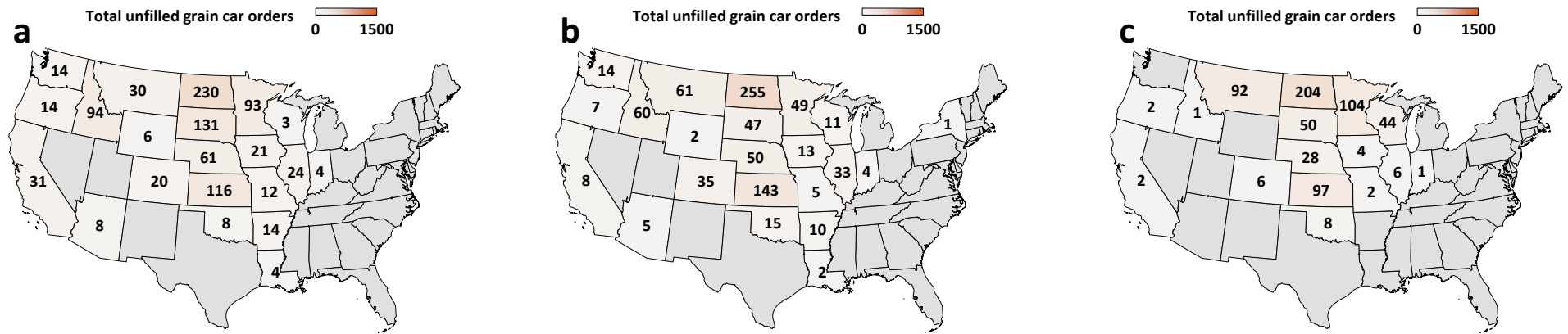
For the week ending: 7/31/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	32	10	388	47	10	185	672
	Average over last 4 weeks	46	15	314	45	9	187	616
	Average of same 4 weeks last year	16	11	238	64	11	351	691
Average number of loaded grain cars not moved in over 48 hours	This week	43	233	566	34	16	293	1,185
	Average over last 4 weeks	63	205	561	61	15	230	1,135
	Average of same 4 weeks last year	30	182	289	62	16	905	1,484
Average number of grain unit trains held	This week	0	0	4	4	1	8	16
	Average over last 4 weeks	0	1	6	4	0	5	16
	Average of same 4 weeks last year	0	0	4	5	0	7	16
Total unfilled manifest grain car orders	This week	5	0	374	388	0	171	938
	Average over last 4 weeks	11	0	338	332	0	147	828
	Average of same 4 weeks last year	1	0	323	131	0	218	673

Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City.

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](#).

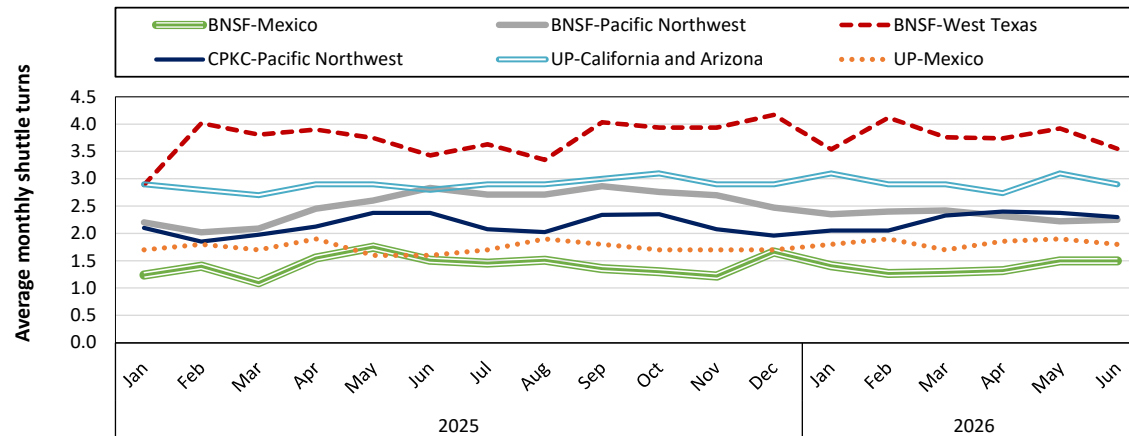
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 7/31/2026 (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

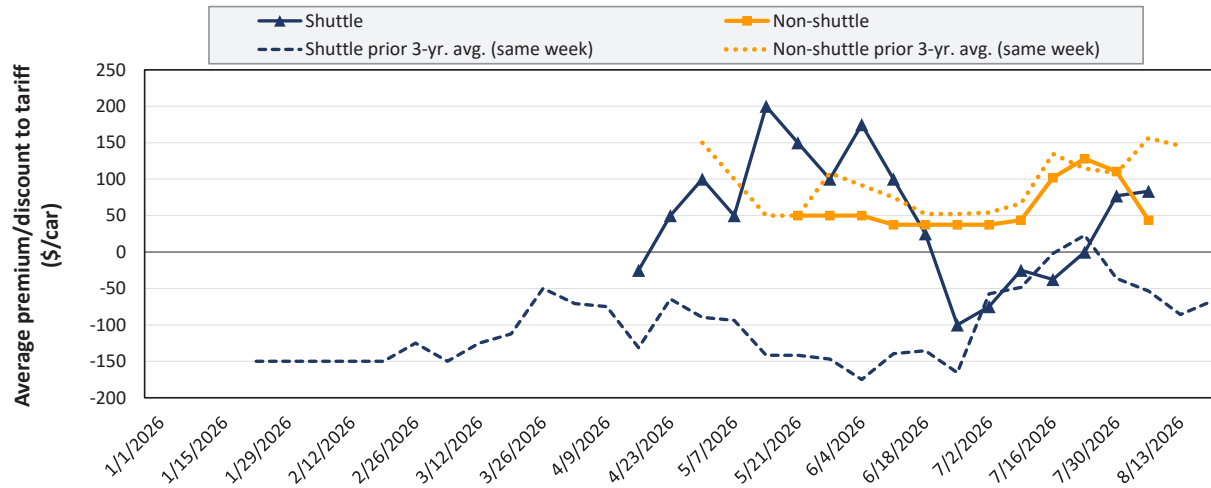


In June 2026, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.3 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.8 to 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.com/). 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., 1 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 2026



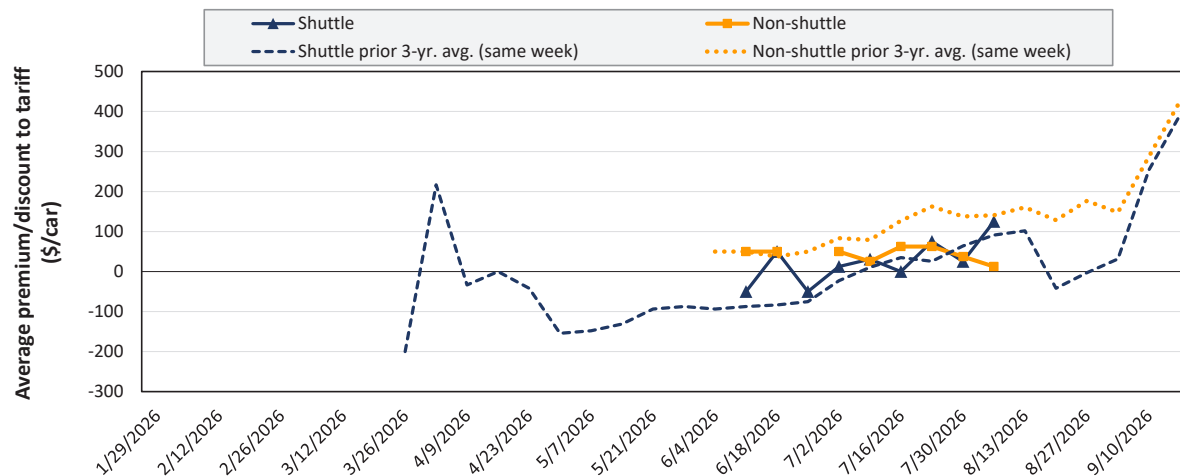
Average non-shuttle bids/offers fell \$67 this week, and are \$84 below the peak.

Average shuttle bids/offers rose \$6 this week and are \$117 below the peak.

8/6/2026	BNSF	UP
Non-Shuttle	\$100	-\$13
Shuttle	\$133	\$33

Note: Shuttle bids/offers are for shuttle trains—110+ 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 the Malsam Company.

Figure 7. Secondary market bids/offers for railcars to be delivered in September 2026



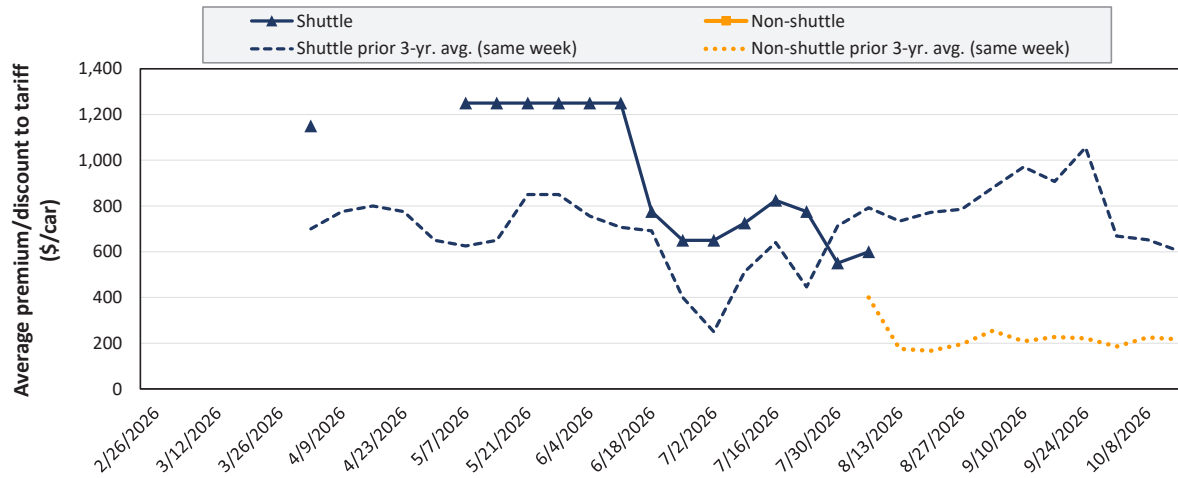
Average non-shuttle bids/offers fell \$25 this week, and are \$50 below the peak.

Average shuttle bids/offers rose \$100 this week and are at the peak.

8/6/2026	BNSF	UP
Non-Shuttle	\$0	\$25
Shuttle	\$350	-\$100

Note: Shuttle bids/offers are for shuttle trains—110+ 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 the Malsam Company.

Figure 8. Secondary market bids/offers for railcars to be delivered in October 2026



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

Average shuttle bids/offers rose \$50 this week and are \$650 below the peak.

8/6/2026	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	\$800	\$400

Note: Shuttle bids/offers are for shuttle trains—110+ 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 the Malsam Company.

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

For the week ending: 8/6/2026		Delivery period					
		Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27
Non-shuttle	BNSF	100	0	n/a	n/a	n/a	n/a
	Change from last week	-71	0	n/a	n/a	n/a	n/a
	Change from same week 2025	25	-125	n/a	n/a	n/a	n/a
	UP	-13	25	n/a	n/a	n/a	n/a
	Change from last week	-63	-50	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	100	n/a	n/a	n/a	n/a
Shuttle	BNSF	133	350	800	n/a	n/a	n/a
	Change from last week	70	150	0	n/a	n/a	n/a
	Change from same week 2025	233	296	231	n/a	n/a	n/a
	UP	33	-100	400	n/a	n/a	n/a
	Change from last week	-59	50	100	n/a	n/a	n/a
	Change from same week 2025	200	-79	100	n/a	n/a	n/a
	CPKC	100	100	n/a	n/a	n/a	n/a
	Change from last week	0	0	n/a	n/a	n/a	n/a
	Change from same week 2025	n/a	0	n/a	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—110+ 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 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 2026

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	\$5,984	\$444	\$6,428	\$1.74	\$63.84	8.7
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,466	\$222	\$4,688	\$1.27	\$46.56	8.2
	CPKC	Westby, MT	St. Louis, MO	Unit	\$6,013	\$846	\$6,859	\$1.85	\$68.11	9.1
	UP	Yuma, AZ	Houston, TX	Manifest	\$6,025	\$810	\$6,835	\$1.85	\$67.88	6.2
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$5,029	\$257	\$5,286	\$1.43	\$52.50	8.9
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,365	\$619	\$6,984	\$1.89	\$69.35	10.5
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$3,040	\$120	\$3,160	\$0.85	\$31.38	9.5
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,882	\$644	\$6,526	\$1.76	\$64.81	11.8
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,963	\$545	\$6,508	\$1.76	\$64.63	9.8
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,562	\$452	\$6,014	\$1.63	\$59.72	9.7
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,448	\$749	\$6,197	\$1.67	\$61.54	7.9
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,255	\$450	\$5,705	\$1.54	\$56.65	7.7
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$234	\$3,634	\$0.98	\$36.09	5.5
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,400	\$287	\$3,687	\$1.00	\$36.61	1.3
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$773	\$6,573	\$1.78	\$65.28	10.8
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,600	\$544	\$6,144	\$1.66	\$61.01	6.0
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$396	\$4,596	\$1.24	\$45.64	7.9
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$409	\$4,409	\$1.19	\$43.78	8.8
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$337	\$3,837	\$1.04	\$38.10	7.8
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$230	\$3,930	\$1.06	\$39.02	5.0
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$366	\$4,266	\$1.15	\$42.37	8.2
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$686	\$5,211	\$1.41	\$51.75	6.9
	UP	Goodland, KS	Kansas City, MO	Manifest	\$5,067	\$257	\$5,324	\$1.44	\$52.87	4.4
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$339	\$4,114	\$1.11	\$40.85	4.2
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$451	\$4,476	\$1.21	\$44.45	5.2
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,964	\$278	\$5,242	\$1.42	\$52.05	8.2
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,589	\$351	\$4,940	\$1.34	\$49.06	10.0
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,082	\$173	\$2,255	\$0.61	\$22.39	9.7
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$260	\$8,871	\$2.40	\$88.09	6.3
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$260	\$7,936	\$2.14	\$78.80	7.0
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$166	\$6,268	\$1.69	\$62.24	5.8
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$443	\$9,275	\$2.51	\$92.10	8.2

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. 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 Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, August 2026

Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	\$5,600	\$401	\$6,001	\$1.51	\$59.59	2.1
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$689	\$6,159	\$1.55	\$61.16	10.2
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$664	\$6,124	\$1.54	\$60.81	-0.0
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$283	\$4,783	\$1.21	\$47.50	-6.0
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$761	\$6,111	\$1.54	\$60.69	11.7
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$339	\$4,959	\$1.25	\$49.24	7.2
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$276	\$4,536	\$1.14	\$45.05	-6.5
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$426	\$4,426	\$1.12	\$43.95	-3.9
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$599	\$6,029	\$1.52	\$59.87	9.0
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$679	\$6,109	\$1.54	\$60.67	10.1
	CN	Gibson City, IL	Reserve, LA	Private	\$2,136	\$616	\$2,752	\$0.69	\$27.33	15.9
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,516	\$616	\$3,132	\$0.79	\$31.10	13.7
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$87	\$1,429	\$0.36	\$14.19	3.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$861	\$5,908	\$1.49	\$58.67	6.3
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$829	\$6,342	\$1.60	\$62.97	5.6
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$227	\$6,468	\$1.63	\$64.23	8.5
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$250	\$6,628	\$1.67	\$65.82	8.0
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$160	\$5,051	\$1.27	\$50.16	7.3
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$408	\$4,343	\$1.10	\$43.13	1.2
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$927	\$6,782	\$1.71	\$67.35	4.7
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$1,025	\$7,040	\$1.78	\$69.91	5.3
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$421	\$5,276	\$1.33	\$52.40	1.1
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$694	\$6,229	\$1.57	\$61.86	3.2
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$427	\$4,502	\$1.14	\$44.70	1.3
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,135	\$629	\$6,764	\$1.83	\$67.17	8.4
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$598	\$5,783	\$1.56	\$57.43	-14.9
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,085	\$609	\$6,694	\$1.81	\$66.47	8.2
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$320	\$3,720	\$1.01	\$36.94	7.5
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,185	\$757	\$6,942	\$1.88	\$68.94	10.2
	CN	Gibson City, IL	Reserve, LA	Private	\$2,136	\$616	\$2,752	\$0.74	\$27.33	15.9
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,516	\$616	\$3,132	\$0.85	\$31.10	13.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$861	\$6,646	\$1.80	\$66.00	5.6
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$651	\$4,177	\$1.13	\$41.48	6.7
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$249	\$3,895	\$1.05	\$38.68	6.8
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$243	\$3,457	\$0.93	\$34.33	7.6
	UP	Canton, KS	Houston, TX	Railroad	\$3,650	\$441	\$4,091	\$1.11	\$40.62	-23.9
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,140	\$922	\$6,062	\$1.64	\$60.19	-8.3
	UP	Cozad, NE	Houston, TX	Railroad	\$4,010	\$636	\$4,646	\$1.26	\$46.14	-20.4
	UP	Sloan, IA	Ama, LA	Railroad	\$4,090	\$726	\$4,816	\$1.30	\$47.83	-19.2

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](#).

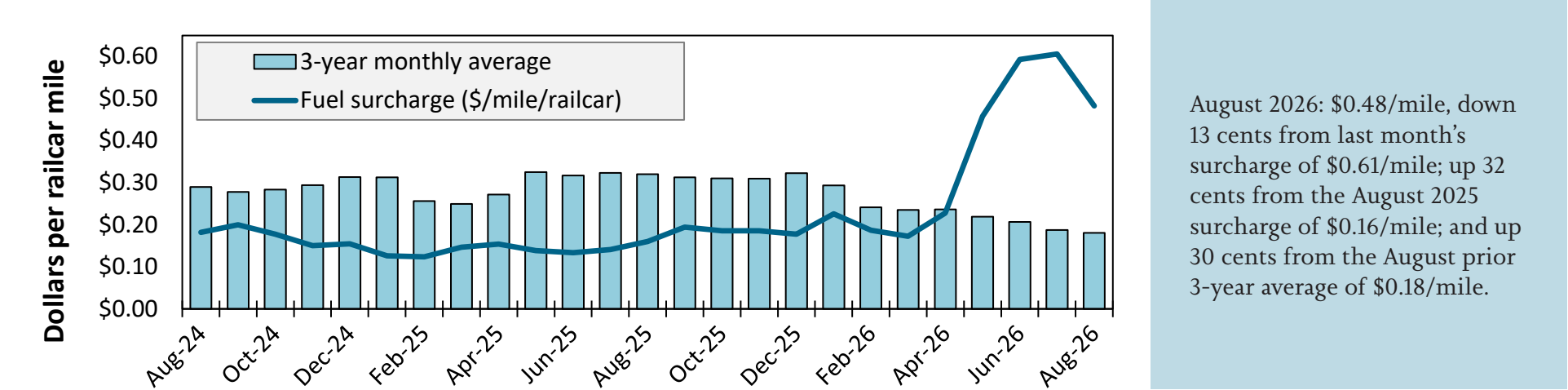
Source: BNSF Railway, Canadian National Railway, CPKC, CSX Transportation, and Union Pacific Railroad.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, August 2026

Commodity	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
Corn	BNSF	Adair, IL	El Paso, TX	Shuttle	\$4,641	\$462	\$5,103	\$1.28	\$50.22	9.7
	BNSF	Superior, NE	El Paso, TX	Shuttle	\$4,622	\$363	\$4,985	\$1.25	\$49.06	-1.7
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$938	\$6,018	\$1.50	\$59.23	8.3
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	\$5,550	\$1,038	\$6,588	\$1.65	\$64.84	8.4
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$896	\$5,901	\$1.48	\$58.08	8.1
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	\$5,190	\$950	\$6,140	\$1.54	\$60.43	8.3
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	\$4,535	\$753	\$5,288	\$1.32	\$52.04	4.3
Soybeans	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,655	\$782	\$5,437	\$1.36	\$53.51	4.5
	BNSF	Brunswick, MO	El Paso, TX	Shuttle	\$4,325	\$392	\$4,717	\$1.26	\$46.43	-12.7
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	\$4,325	\$390	\$4,715	\$1.26	\$46.41	-12.7
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$938	\$6,018	\$1.61	\$59.23	8.3
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$896	\$5,901	\$1.58	\$58.08	8.1
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	\$4,950	\$717	\$5,667	\$1.52	\$55.77	-14.3
	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,035	\$751	\$5,786	\$1.55	\$56.95	-13.9
Wheat	BNSF	FT Worth, TX	El Paso, TX	DET	\$3,100	\$283	\$3,383	\$0.91	\$33.30	10.7
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	\$2,600	\$283	\$2,883	\$0.77	\$28.37	1.0
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$896	\$5,901	\$1.58	\$58.08	8.1
	UP	Great Bend, KS	Laredo, TX	Shuttle	\$4,325	\$538	\$4,863	\$1.30	\$47.86	5.7
	UP	Wichita, KS	Laredo, TX	Shuttle	\$4,065	\$474	\$4,539	\$1.22	\$44.67	5.4

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 Canadian Pacific Kansas City Railway (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).

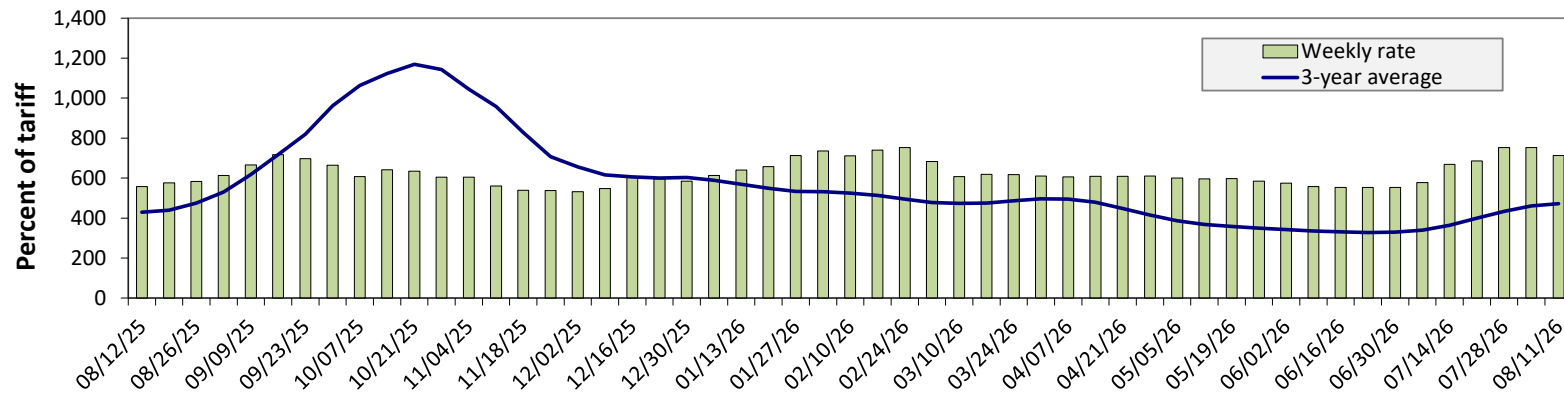
Figure 9. Railroad fuel surcharges, North American weighted average



August 2026: \$0.48/mile, down 13 cents from last month's surcharge of \$0.61/mile; up 32 cents from the August 2025 surcharge of \$0.16/mile; and up 30 cents from the August prior 3-year average of \$0.18/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 Kansas City Railway, Union Pacific Railroad, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending August 11: 5 percent lower than the previous week; 28 percent higher than last year; and 51 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	8/11/2026	807	747	714	630	675	582
	8/4/2026	818	796	753	638	669	591
\$/ton	8/11/2026	49.95	39.74	33.13	25.14	31.66	18.27
	8/4/2026	50.63	42.35	34.94	25.46	31.38	18.56
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	35	32	28	40	45	31
	3-year avg.	51	53	51	65	62	64
Rate	September	925	893	868	830	857	821
	November	811	779	740	677	707	604

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](#).

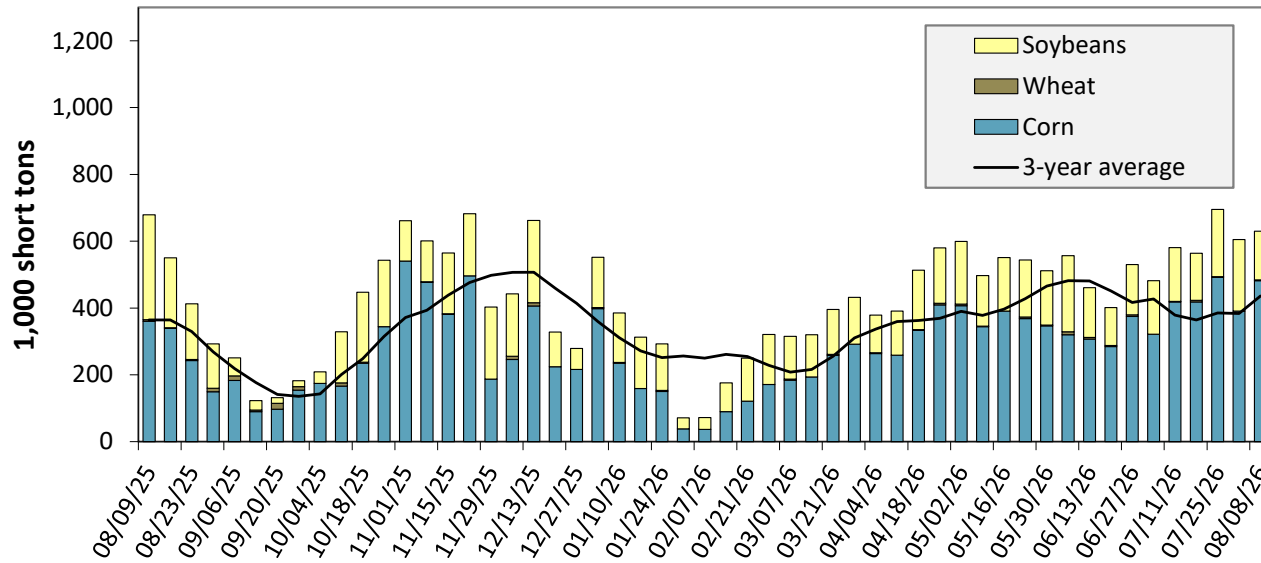
Source: USDA, Agricultural Marketing Service.

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 8:
7 percent lower than last year
and 44 percent higher than the
3-year average.

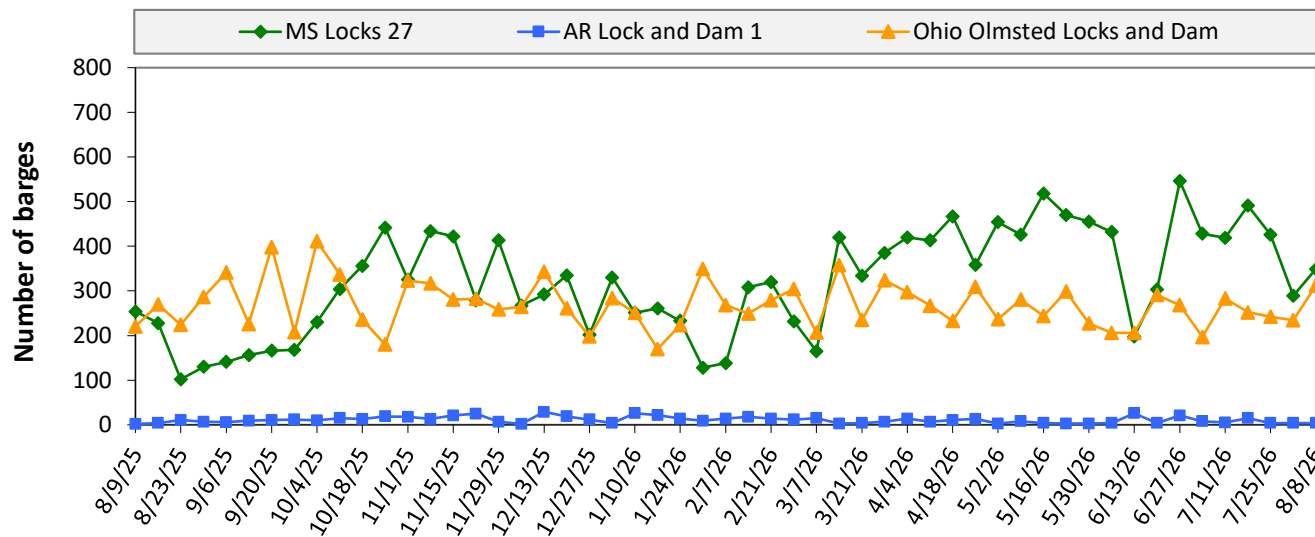
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/08/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	206	0	103	2	310
Mississippi River (Winfield, MO (L25))	269	2	129	2	401
Mississippi River (Alton, IL (L26))	355	2	109	2	467
Mississippi River (Granite City, IL (L27))	482	2	146	2	632
Illinois River (La Grange)	136	2	30	0	168
Ohio River (Olmsted)	37	21	20	0	78
Arkansas River (L1)	0	7	0	0	7
Weekly total - 2026	520	30	166	2	717
Weekly total - 2025	390	68	395	0	853
2026 YTD	11,196	600	6,401	64	18,262
2025 YTD	12,996	810	6,928	125	20,858
2026 as % of 2025 YTD	86	74	92	51	88
Last 4 weeks as % of 2025	123	60	60	113	93
Total 2025	20,015	1,259	11,322	166	32,761

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.

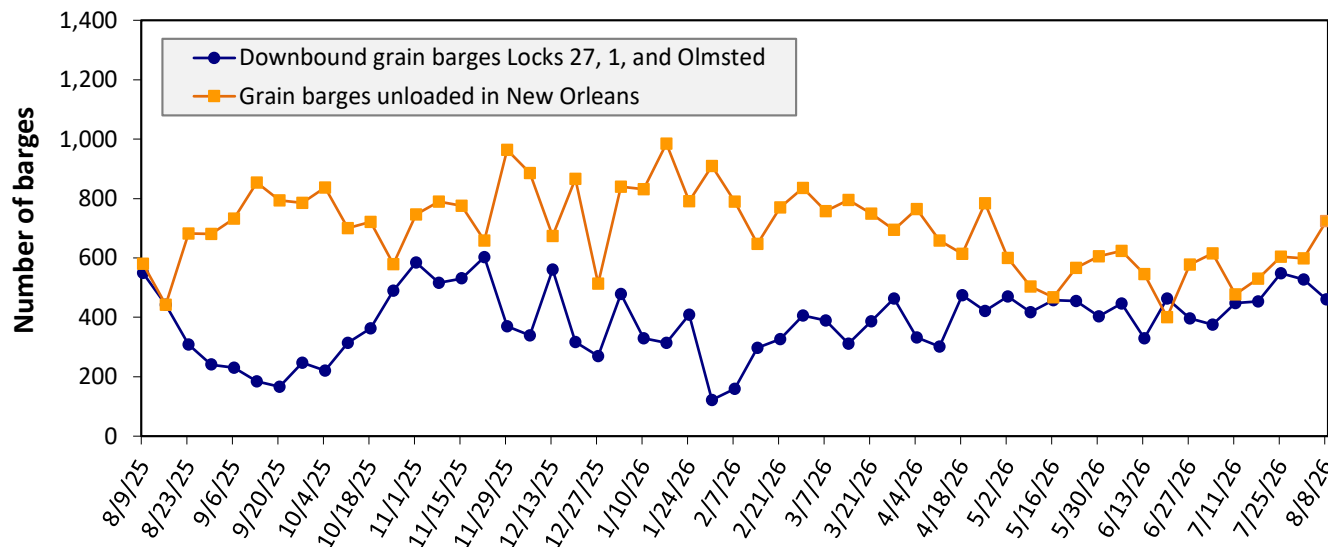
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 8: 665 barges transited the locks, 138 barges more than the previous week, and 40 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 8: 460 barges moved down river, 67 fewer than the previous week; 724 grain barges unloaded in the New Orleans Region, 21 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 2026	July 2026	August 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$24.76	\$24.96	\$23.06	7.3	12.4
	Central Ferry, WA/Almota, WA	\$23.80	\$24.03	\$22.13	7.5	12.6
	Lyons Ferry, WA	\$22.71	\$22.98	\$21.08	7.7	12.8
	Windust, WA/Lower Monumental, WA	\$21.60	\$21.91	\$20.01	7.9	13.1
	Sheffler, WA	\$21.57	\$21.88	\$19.98	7.9	13.1
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$20.29	\$20.64	\$18.74	8.2	13.5
	Port Kelly, WA/Wallula, WA	\$20.05	\$20.41	\$18.51	8.3	13.6
	Umatilla, OR	\$19.95	\$20.31	\$18.41	8.3	13.7
	Boardman, OR/Hogue Warner, OR	\$19.67	\$20.04	\$18.14	8.4	13.8
	Arlington, OR/Roosevelt, WA	\$19.50	\$19.88	\$17.98	8.4	13.8
	Biggs, OR	\$18.07	\$18.50	\$16.60	8.8	14.3
	The Dalles, OR	\$16.89	\$17.36	\$15.46	9.2	14.9

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

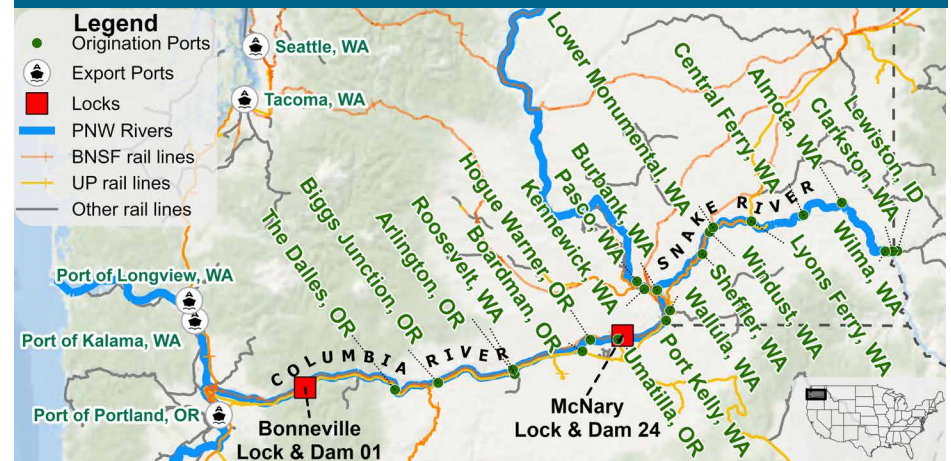
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

July, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	295	0	295
Columbia River (Bonneville Lock and Dam (L1))	339	0	339
Monthly total 2026	339	0	339
Monthly total 2025	279	0	279
2026 YTD	1,884	0	1,884
2025 YTD	2,208	0	2,208

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.

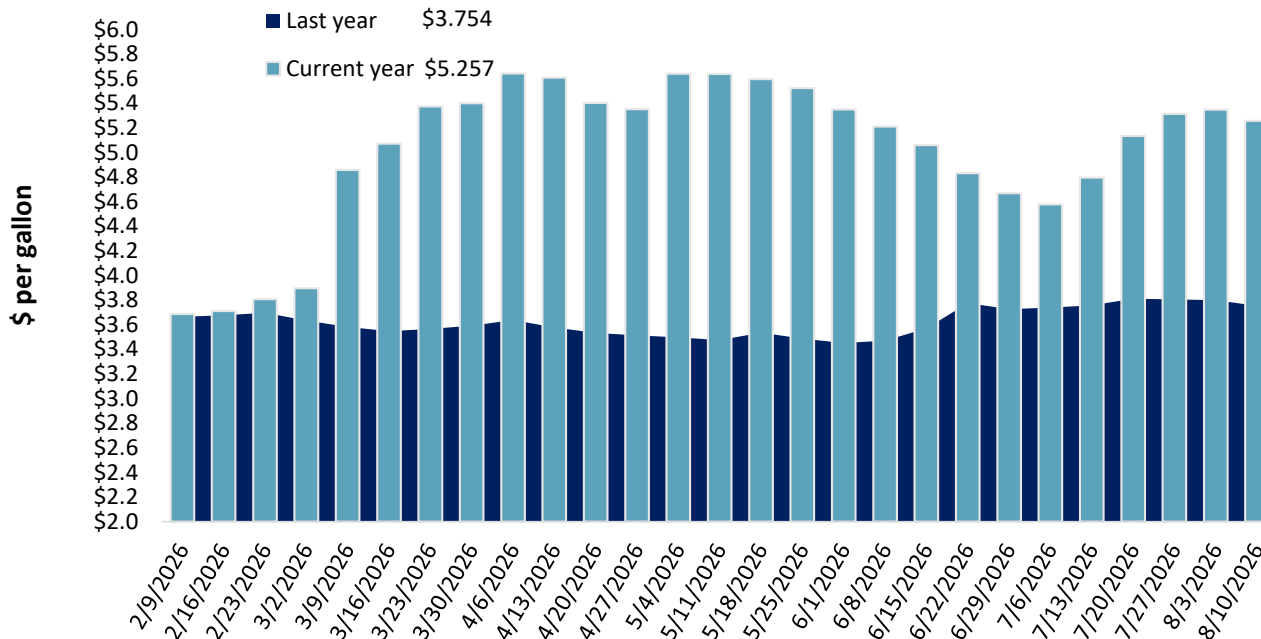
Table 13. Retail on-highway diesel prices, week ending 8/10/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.193	-0.106	1.436
	New England	5.514	-0.035	1.529
	Central Atlantic	5.535	-0.052	1.593
	Lower Atlantic	5.034	-0.134	1.368
II	Midwest	5.181	-0.081	1.434
III	Gulf Coast	5.044	-0.097	1.647
IV	Rocky Mountain	5.271	-0.014	1.495
V	West Coast	6.033	-0.097	1.541
	West Coast less California	5.526	-0.097	1.378
	California	6.618	-0.098	1.729
Total	United States	5.257	-0.091	1.503

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 10, the U.S. average diesel fuel price decreased 9.1 cents from the previous week to \$5.257 per gallon, 150.3 cents above the same week last year.

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

Source: U.S. Department of Energy, Energy Information Administration.

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

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending 08/06/2026	834	542	1,291	1,219	105	3,991	7,437	2,203	13,631
	This week year ago	2,567	945	1,712	1,474	71	6,770	6,122	2,695	15,586
	Last 4 wks. as % of same period in prior marketing year	34	67	80	86	176	63	158	95	105
Current shipped (cumulative) exports sales	Current MYTD	958	618	937	863	107	3,482	80,066	39,587	123,135
	Prior MYTD	1,849	693	1,064	530	99	4,236	64,411	48,369	117,015
	Current MYTD as % of prior MYTD	52	89	88	163	108	82	124	82	105
	Total 2025/26	8,243	3,202	6,078	5,207	622	23,419	-	-	23,419
	Total 2024/25	5,377	3,095	6,560	5,730	335	21,097	69,081	50,106	140,284
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328

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

Source: USDA, Foreign Agricultural Service.

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

For the week ending 8/06/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
Mexico	3,984	25,093	23,183	8	19,839
Japan	1691	15,847	13,449	18	10,478
Colombia	799	8,792	7,584	16	5,493
China	0	0	33	-100	3,461
Korea	1022	8,933	6,278	42	3,127
Top 5 importers	7,496	58,666	50,526	16	42,399
Total U.S. corn export sales	10,575	87,503	70,533	24	54,276
% of YTD current month's export projection	13%	101%	97%	-	-
Change from prior week	925	411	-89	-	-
Top 5 importers' share of U.S. corn export sales	71%	67%	72%	-	78%
USDA forecast August 2026	83,189	86,365	72,978	18	-
Corn use for ethanol USDA forecast August 2026	142,240	140,970	138,075	2	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (September 1 – August 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments’ change (net sales) from prior week could include revisions from previous week’s outstanding sales or accumulated sales. In rightmost column, “Exports” = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; “-” = not applicable.

Source: USDA, Foreign Agricultural Service.

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

For the week ending 8/06/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
China	4,557	12,498	22,479	-44	26,078
Mexico	1,294	5,105	5,066	1	4,762
Japan	157	2,373	2,145	11	2,107
Egypt	137	5,014	3,622	38	2,098
Indonesia	53	2,499	2,060	21	1,997
Top 5 importers	6,197	27,489	35,371	-22	37,042
Total U.S. soybean export sales	10,133	41,790	51,064	-18	48,941
% of YTD current month's export projection	22%	101%	99%	-	-
Change from prior week	1760	75	-378	-	-
Top 5 importers' share of U.S. soybean export sales	61%	66%	69%	-	76%
USDA forecast, August 2026	45,178	41,368	51,492	-20	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (September 1 – August 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments’ change (net sales) from prior week could include revisions from previous week’s outstanding sales or accumulated sales. In rightmost column, “Exports” = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; “-” = not applicable.

Source: USDA, Foreign Agricultural Service.

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

For the week ending 8/06/2026	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2023-25 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26		
Mexico	1,717	1,820	-6	3,744
Philippines	958	1,148	-17	2,677
Japan	946	805	18	2,050
Korea	811	764	6	1,888
Taiwan	378	398	-5	1,005
Nigeria	195	611	-68	878
China	NA	0	NA	863
Indonesia	204	497	-59	746
Thailand	222	233	-5	690
Vietnam	114	190	-40	581
Top 10 importers	5,545	6,467	-14	15,121
Total U.S. wheat export sales	7,473	11,005	-32	21,015
% of YTD current month's export projection	35%	45%	-	-
Change from prior week	256	723	-	-
Top 10 importers' share of U.S. wheat export sales	74%	59%	-	72%
USDA forecast, August 2026	21,092	24,712	-15	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2025/26 (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)

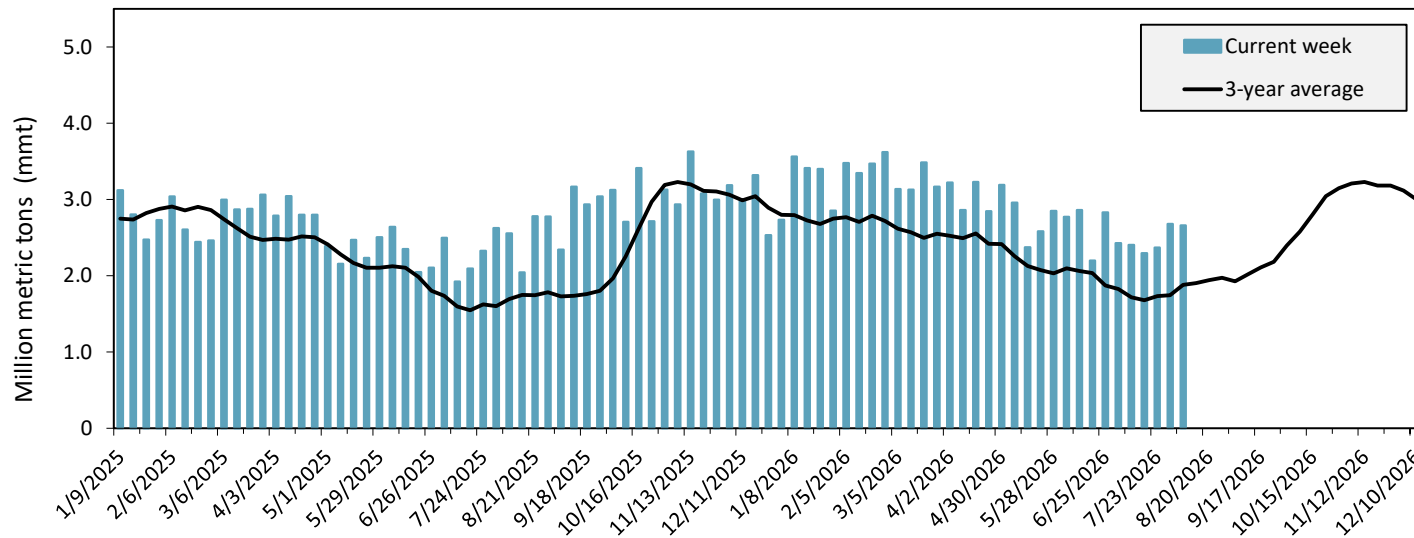
Port regions	Commodity	For the week ending 08/06/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	390	649	60	16,584	15,131	110	134	232	24,214
	Soybeans	0	0	n/a	4,162	1,966	212	n/a	0	2,957
	Wheat	267	257	104	6,029	6,498	93	96	99	12,271
	All grain	657	915	72	27,089	23,710	114	122	171	39,721
Mississippi Gulf	Corn	925	852	109	23,337	22,646	103	133	170	37,115
	Soybeans	261	196	133	13,427	11,995	112	65	86	23,350
	Wheat	38	12	312	1,948	2,413	81	40	41	3,980
	All grain	1,254	1,060	118	38,789	37,093	105	100	126	64,484
Texas Gulf	Corn	37	33	111	1,002	243	412	156	195	590
	Soybeans	0	0	n/a	100	106	94	n/a	n/a	1,431
	Wheat	36	16	219	1,963	2,608	75	26	50	4,690
	All grain	128	143	89	6,643	3,288	202	72	82	7,774
Interior	Corn	317	289	110	9,761	8,581	114	92	126	15,546
	Soybeans	138	140	99	4,482	4,141	108	87	108	7,713
	Wheat	80	51	155	1,915	1,886	102	98	119	3,104
	All grain	547	480	114	16,453	14,938	110	92	120	26,888
Great Lakes	Corn	0	9	0	316	64	490	99	297	414
	Soybeans	0	12	0	58	0	n/a	n/a	n/a	63
	Wheat	0	0	n/a	168	155	108	0	0	434
	All grain	0	21	0	542	219	247	133	137	911
Atlantic	Corn	71	55	129	1,155	212	545	591	n/a	607
	Soybeans	0	0	n/a	610	484	126	54	75	1,085
	Wheat	1	2	45	12	47	26	30	29	81
	All grain	72	57	126	1,778	743	239	318	485	1,773
All Regions	Corn	1,740	1,888	92	52,155	46,877	111	125	178	78,486
	Soybeans	399	347	115	23,348	18,795	124	74	95	36,852
	Wheat	421	339	124	12,035	13,607	88	64	75	24,560
	All grain	2,658	2,678	99	91,803	80,096	115	103	133	141,804

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 2025, approximately 51 percent of the U.S. grain-export shipments departed through the U.S. Gulf region and 28 percent departed through the PNW.

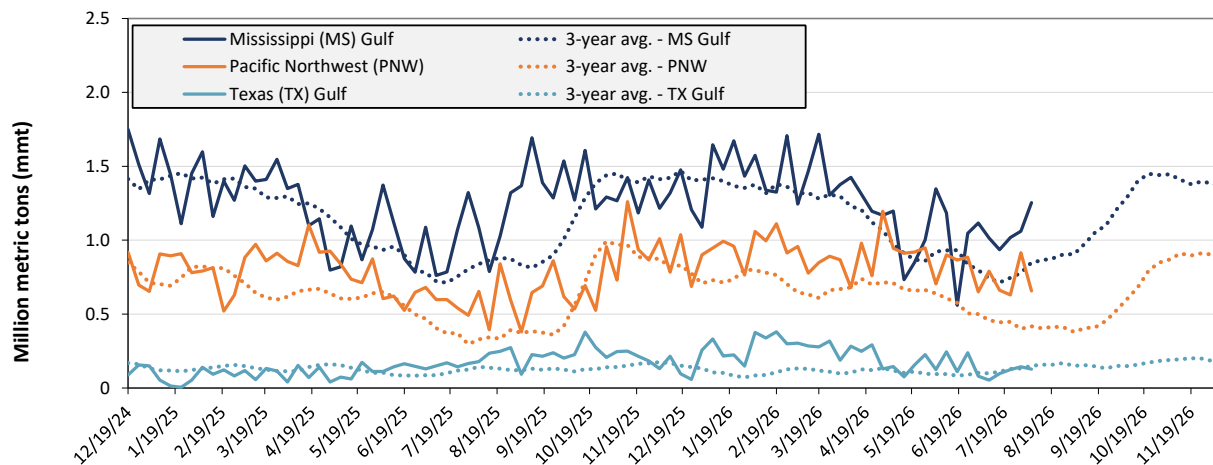
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending August 06: 2.7 mmt of grain inspected, unchanged from the previous week, down 3 percent from the same week last year, and up 41 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 08/06/26 inspections (mmt):

MS Gulf: 1.25

PNW: 0.66

TX Gulf: 0.13

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 18	down 11	up 15	down 28
Last year (same 7 days)	down 2	down 14	down 4	up 3
3-year average (4-week moving average)	up 48	down 14	up 38	up 57

Source: USDA, Federal Grain Inspection Service.

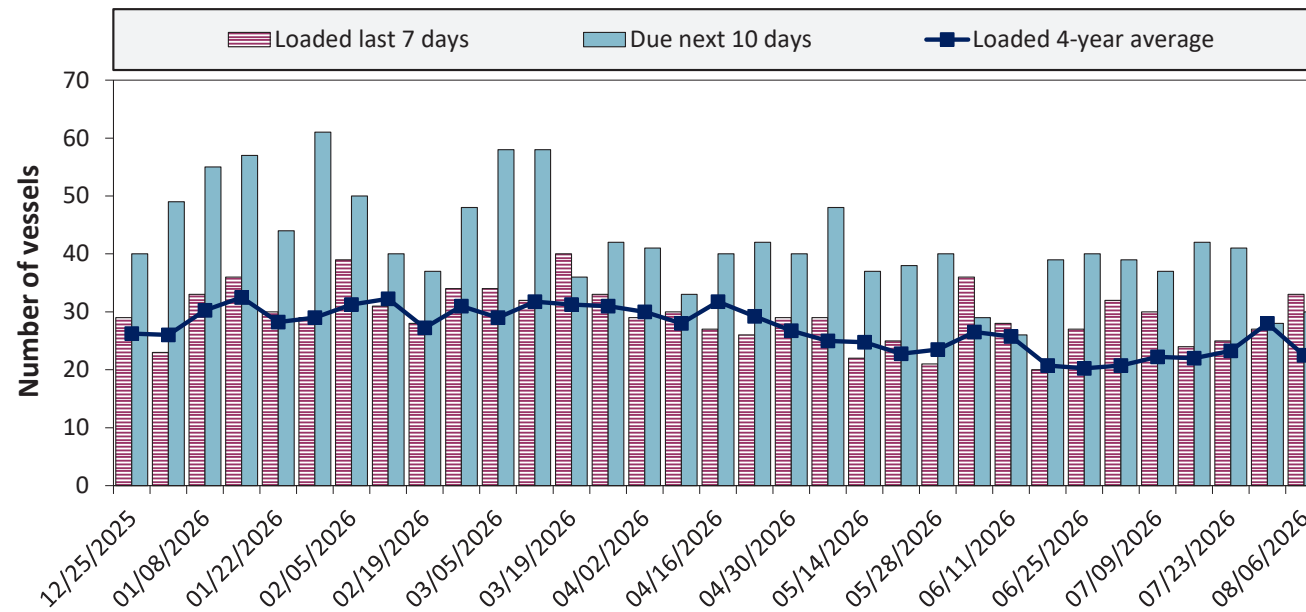
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
8/6/2026	22	33	30	14
7/30/2026	31	27	28	15
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

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

Source: USDA, Agricultural Marketing Service.

Figure 19. U.S. Gulf vessel loading activity

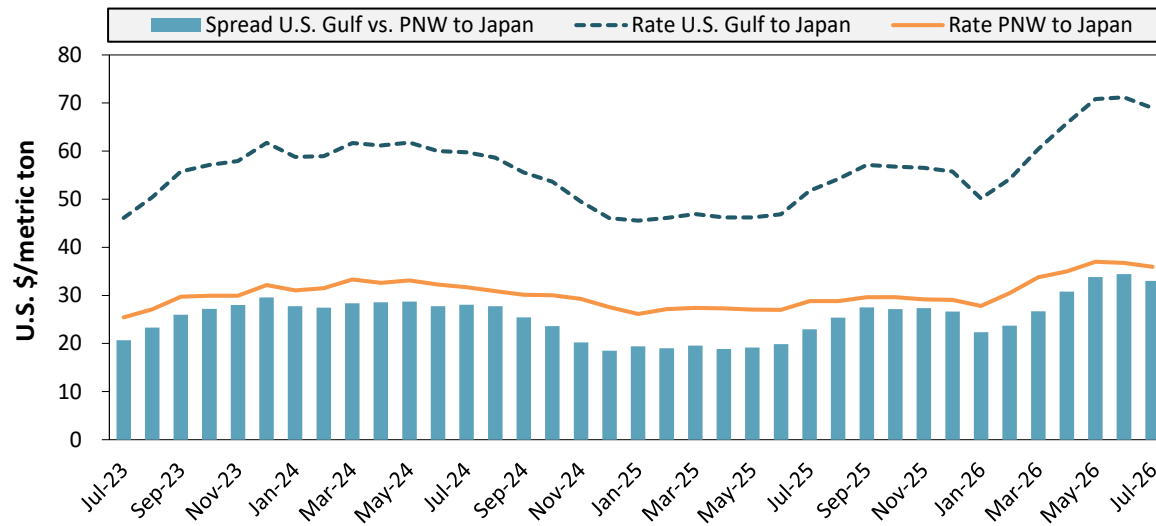


Week ending 08/06/26, number of vessels	Loaded	Due
Change from last year	14%	-9%
Change from 4-year average	47%	-8%

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 /World Perspectives, Inc.

Ocean rates	U.S. Gulf	PNW	Spread
July 2026	\$68.95	\$35.95	\$33.00
Change from July 2025	33%	25%	44%
Change from 4-year average	21%	13%	30%

Table 20. Ocean freight rates for selected shipments, week ending 08/08/2026

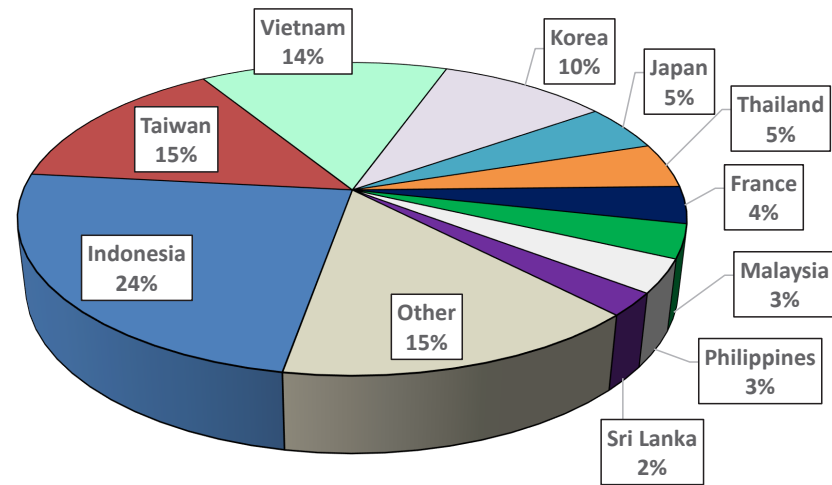
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	China	Heavy grain	Aug 6, 2026	Sept 2/11, 2026	66,000	69.25
U.S. Gulf	Colombia	Soybean meal	Mar 24, 2026	May 1/10, 2026	50,000	31.60
PNW	Japan	Heavy grain	May 21, 2026	Jun 20/Jul 21, 2026	65,000	47.25
PNW	China	Heavy grain	Aug 4, 2026	Sep 1/10, 2026	65,000	35.00
PNW	S. Korea	Heavy grain	Mar 10, 2026	May 20/Jul 20, 2026	68,000	34.75
PNW	Taiwan	Wheat	Jun 5, 2026	Aug 1/15, 2026	59,000	47.95
PNW	Taiwan	Wheat	Apr 2, 2026	May 30/Jun 13, 2026	51,300	52.00
Brazil	China	Heavy grain	Jul 29, 2026	Aug 21/30, 2026	63,000	49.75
Brazil	China	Heavy grain	Jul 29, 2026	Aug 15/20, 2026	63,000	50.00
Brazil	China	Heavy grain	Jul 24, 2026	Aug 14/19, 2026	66,000	52.00
Brazil	China	Heavy grain	Apr 28, 2026	Jun 1/30, 2026	63,000	49.75
Brazil	N. China	Soybeans	May 29, 2026	Jun 24/29, 2026	63,000	52.25
Brazil	N. China	Heavy grain	May 28, 2026	Jun 21/30, 2026	66,000	55.50
Brazil	China	Heavy grain	May 26, 2026	Jun 13/20, 2026	66,000	54.25
Brazil	Poland	Heavy grain	Jul 8, 2026	Aug 14/21, 2026	60,000	30.90

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, PNW = Pacific Northwest.

Source: Maritime Research, Inc.

In 2025, containers were used to transport 11 percent of total U.S. waterborne grain exports. Approximately 48 percent of U.S. waterborne grain exports in 2025 went to Asia, of which 19 percent were moved in containers. Approximately 83 percent of U.S. waterborne containerized grain exports were destined for Asia.

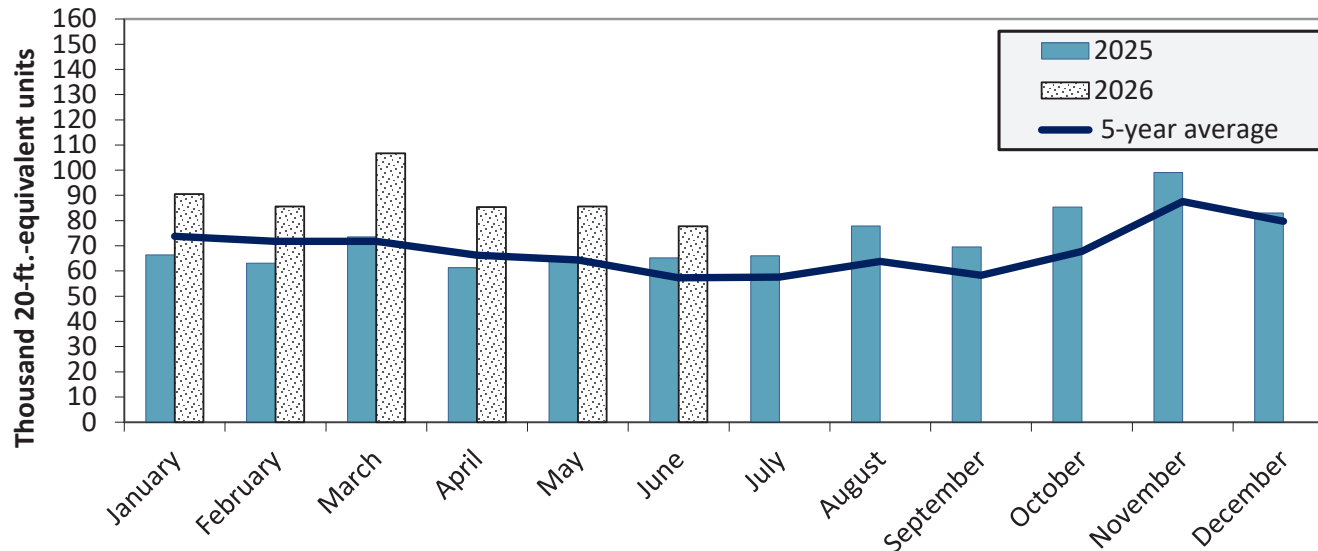
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Jun 2026



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 PERS data, S&P Global.

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



Containerized grain shipments in June 2026 were up 19.2 percent from last year and up 35.8 percent from the 5-year average.

Note: ft. = foot. The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.

Source: USDA, Agricultural Marketing Service analysis of PERS 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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