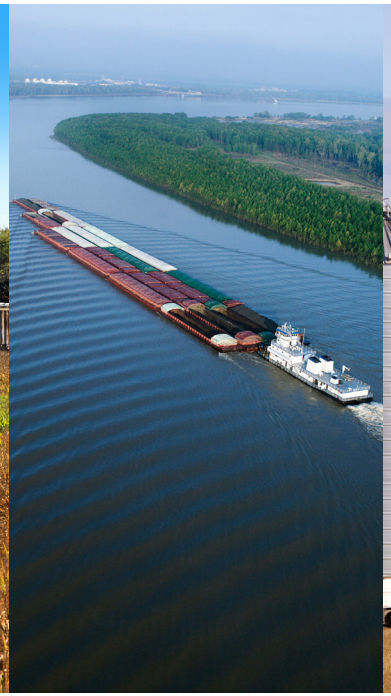
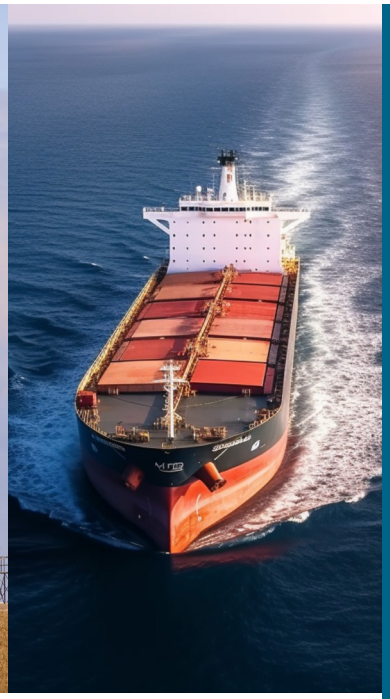
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

August 21, 2025
A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

FXE Train Accident Disrupts Grain Flows to Mexico. On August 6, following a freight train accident in Irapuato, Mexico, the Mexican rail carrier Ferromex (FXE) issued two embargoes. Although both embargoes have been lifted, some delays will persist, as FXE works through its backlog.

From August 11 to 19, FXE embargoed all traffic (all commodities) destined to the western Mexican States of Colima, Jalisco, Michoacán, and Nayarit—with exemptions for certain consignees in Jalisco, including several agricultural companies (e.g., Gavilon, Viterra, etc.). From August 12 to 15, FXE embargoed traffic to eight specific grainhandling stations in central Mexico.

According to USDA grain inspections data (available on AgTransport), between January 1 and August 14, 2025, Mexico was the leading destination for U.S. grain exports, representing 24 percent of all U.S. grain exports. (Japan was second with 15 percent, and China was third with 7 percent.) Compared to the same period last year, grain inspections to Mexico were up 5 percent.

DOT BUILD Grants To Benefit Grain Transportation in Missouri and Montana. Last month, the U.S. Department of Transportation (DOT) announced an additional $488 million in awards from the fiscal year 2025 Better Utilizing Investments to Leverage Development (BUILD) discretionary grant program (*Grain Transportation Report, January 16, 2025, third highlight*). At least two projects, totaling $50 million, will benefit grain transportation.

About 100 miles from St. Louis, MO, part of a $25 million project will widen 14 miles of US Route 54 from two to four lanes (between Farber and Curryville). The road segment crosses Missouri's Northeast agricultural district, which produces 16 percent of the State's corn and soybeans, according to the *2022 Census of Agriculture*. A separate $25 million project in Montana will reconstruct 7 miles of rural Montana Highway 200 in McCone County—widening shoulders to 6 feet, flattening vertical curves, and adding centerline. BNSF Railway has six shuttle elevators within about 100 miles of the project.

BUILD grants fund surface transportation infrastructure projects with significant local or regional impact.

Roughly 2,000 Barges Approach Retirement. A recent Freightweek STL panel session on the outlook of the barge industry asserted the dry, covered barge market is facing a "retirement cliff." Noting a barge lifespan is "roughly 25- to 30-some years," the panel estimated that, of the 13,200-barge fleet, "about 2,000 barges" are due to retire—a situation that could generate "tightness" in barge supply (and potentially push up barge rates).

The *Waterways Journal* (*WJ*) has noted the aging of the barge fleet is made more dire by the fact that only two builders—Arcosa and Heartland Fabrication—are still in operation since Jeffboat closed in 2018. *WJ* further noted the high cost of steel as an "impediment" to substantially raising new build rates.

According to *WJ*, the number of dry barges built during 2024 totaled 322, while new tank barges totaled 22. Retirements in 2024 totaled 286 barges, including 147 dry barges and 139 tank barges. The 2024 total is below the annual average of 369 since 2017, but more than the 137 retired in 2023.

Diesel Price Drops for Fourth Consecutive Week. For the week ending August 18, the U.S. average diesel fuel price decreased 4.1 cents from the previous week to $3.713 per gallon, 2.5 cents above the same week last year. The diesel price has fallen 9.9 cents per gallon in the last 4 weeks. The Gulf Coast region saw the largest price drop of 5.7 cents per gallon. In the Midwest, the price fell nearly 5 cents per gallon.

According to the Energy Information Administration's (EIA) August *Short Term Energy Outlook*, the Brent crude oil price is projected to fall from $71 per barrel (b) in July to $58/b in fourth quarter 2025. The price forecast is driven largely by rising oil inventory, following OPEC+ members' decision to accelerate the pace of production increases.

EIA also projects the diesel price to average $3.66 per gallon in fourth quarter 2025—down 12 cents from the projected third quarter price of $3.78 and up 7 cents from EIA's July forecast. U.S. diesel prices are projected to average $3.66 per gallon in 2025—down 10 cents from 2024's average price of $3.76 per gallon.

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 7, **unshipped balances** of corn and soybeans totaled 8.82 million metric tons (mmt), down 22 percent from last week and up 11 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 6.77 mmt, up 6 percent from last week and up 35 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were –0.09 mmt, down significantly from last week. Net **soybean export sales** were –0.38 mmt, down significantly from last week. Net **wheat export sales** for MY 2025/26 were 0.72 mmt, down 2 percent from last week.

Rail

U.S. Class I railroads originated 23,951 **grain carloads** during the week ending August 9. This was a 10-percent decrease from the previous week, 6 percent more than last year, and 13 percent more than the 3-year average.

Average August **shuttle secondary railcar bids/offers** (per car) were $120 below tariff for the week ending August 14. This was $13 more than last week and $158 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $75 above tariff. This was unchanged from last week and $225 lower than this week last year.

Barge

For the week ending August 16, **barged grain movements** totaled 667,350 tons. This was 22 percent less than the previous week and 5 percent less than the same period last year.

For the week ending August 16, 442 grain barges **moved down river**—108 fewer than last week. There were 443 grain barges **unloaded** in the New Orleans region, 24 percent fewer than last week.

Ocean

For the week ending August 14, 11 **oceangoing grain vessels** were loaded in the Gulf—48 percent fewer than the same period last year. Within the next 10 days (starting August 15), 47 vessels were expected to be loaded—7 percent more than the same period last year.

As of August 14, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $53.50, down 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $28.75 per mt, unchanged from the previous week.

Second-Quarter 2025 Wheat Transportation Costs and Farm Values Decline

From first to second quarter 2025 (quarter to quarter), costs fell for transporting wheat to Japan from Kansas (KS) and North Dakota (ND) through the Pacific Northwest (PNW routes) and the U.S. Gulf (Gulf routes). These costs also decreased from second quarter 2024 to second quarter 2025 (year to year). Both quarter to quarter and year to year, total landed costs (farm value plus transportation costs) decreased.

Transportation Costs

For the KS-PNW route to Japan, wheat transportation costs fell 5 percent quarter to quarter and fell 7 percent year to year. For the ND-PNW route, costs were down 3 percent quarter to quarter and down 2 percent year to year.

For the KS-Gulf route to Japan, wheat transportation costs were down 4 percent quarter to quarter and down 12 percent year to year. For the ND-Gulf route, costs fell 3 percent quarter to quarter and fell 9 percent year to year.

The quarter-to-quarter decrease in transportation costs was due to lower truck and rail freight rates for Kansas wheat and lower truck freight rates for North Dakota wheat. The year-to-year decline in costs stemmed from the drop in rail and ocean vessel freight rates for Kansas wheat and a drop in ocean freight rates for North Dakota wheat.

Table 1. Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through PNW

Mode	Kansas					North Dakota				
	2024 2nd qtr	2025 1st qtr	2025 2nd qtr	Year-to-year change	Quarterly change	2024 2nd qtr	2025 1st qtr	2025 2nd qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	16.47	21.69	18.07	9.78	-16.64	16.47	21.69	18.07	9.78	-16.64
Rail	70.07	68.00	65.28	-6.84	-4.00	57.28	58.81	58.90	2.83	0.15
Ocean vessel	32.66	26.88	27.12	-16.96	0.86	32.66	26.88	27.12	-16.96	0.86
Transportation costs	119.20	116.57	110.47	-7.32	-5.23	106.41	107.38	104.09	-2.17	-3.06
Farm value	217.16	195.35	183.96	-15.29	-5.83	239.20	217.28	211.15	-11.73	-2.82
Total landed cost	336.36	311.92	294.43	-12.46	-5.61	345.61	324.66	315.24	-8.78	-2.90
Transport % of landed cost	35.44	37.37	37.52	5.88	0.40	30.79	33.08	33.02	7.25	-0.17

Table 2. Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through U.S. Gulf

Mode	Kansas					North Dakota				
	2024 2nd qtr	2025 1st qtr	2025 2nd qtr	Year-to-year change	Quarterly change	2024 2nd qtr	2025 1st qtr	2025 2nd qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	16.47	21.69	18.07	9.78	-16.64	16.47	21.69	18.07	9.78	-16.64
Rail	46.26	46.24	44.60	-3.59	-3.55	53.95	55.16	55.36	2.61	0.36
Ocean vessel	61.00	46.20	46.42	-23.90	0.50	61.00	46.20	46.42	-23.90	0.50
Transportation costs	123.73	114.13	109.09	-11.82	-4.40	131.42	123.05	119.85	-8.80	-2.58
Farm value	217.16	195.35	183.96	-15.29	-5.83	239.20	217.28	211.15	-11.73	-2.82
Total landed cost	340.89	309.48	293.05	-14.03	-5.30	370.62	340.33	331.00	-10.69	-2.74
Transport % of landed cost	36.30	36.88	37.23	2.57	0.95	35.46	36.15	36.21	2.12	0.16

Note: Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car. The previous Kansas to PNW rail rate (via Union Pacific) was discontinued. USDA/AMS data for the Kansas to PNW rate (via BNSF) begin in June 2024. For comparison purposes, the base BNSF tariff rate in June 2024 was assumed for entire second quarter 2024. All quarters reflect changes in fuel surcharges. USDA's National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly, hard red spring) and Kansas (mainly, hard red winter). PNW = Pacific Northwest; qtr = quarter. Source: USDA, Agricultural Marketing Service.

Ocean Freight Rates. Ocean freight rates for shipping wheat from PNW were up 1 percent quarter to quarter and down 17 percent year to year. Gulf-route ocean rates increased 1 percent from quarter to quarter and fell 24 percent from year to year.

Second-quarter 2025 ocean freight rates for bulk grain remained stable quarter to quarter, primarily because China's weak demand for coal imports balanced out rising iron ore shipments. Year to year, ocean freight rates declined significantly because of persistently weak global dry bulk cargo demand compared to 2024 levels—especially from China's coal sector (*Grain Transportation Report, July 31, 2025*).

Rail Freight Rates. For the KS-PNW route, rail rates for shipping wheat were down 4 percent quarter to quarter and down 7 percent year to year. For the ND-PNW route, rail rates were nearly unchanged quarter to quarter and up 3 percent year to year.

For the KS-Gulf route, rail rates were down 4 percent both quarter to quarter and year to year. For the ND-Gulf route, rail rates were nearly unchanged quarter to quarter and up 3 percent year to year.

Truck Freight Rates. Quarter to quarter, PNW and U.S. Gulf trucking rates decreased 17 percent and, year to year, rose 10 percent. The U.S. average diesel price fell from the week ending April 14 to the week ending June 2. From June 9 to the week ending July 14, the average diesel price rose (*Grain Transportation Report, July 17, 2025*).

Total Landed Costs

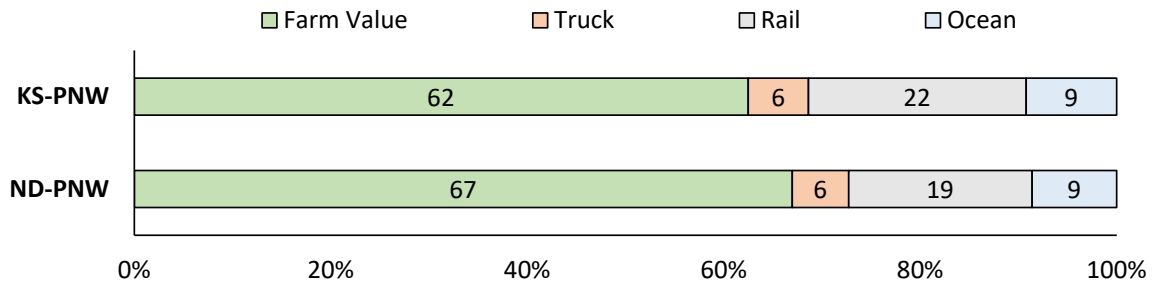
Kansas and North Dakota Wheat. Both quarter to quarter and year to year, total landed costs were down for all Gulf and PNW routes.

For Kansas wheat, the quarter-to-quarter decline for total landed costs was due to lower farm values and lower truck and rail freight rates. The year-to-year decrease was primarily due to lower farm values and lower rail and ocean freight rates.

For North Dakota wheat, the quarter-to-quarter decline in total landed costs owed primarily to lower farm values and truck freight rates. The year-to-year drop stemmed from lower farm values and ocean freight rates (tables 1 and 2).

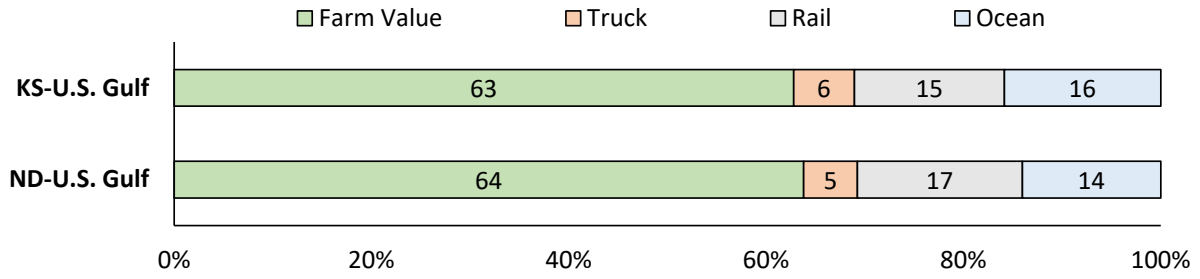
PNW Routes. In second quarter 2025, total landed costs for shipping to Japan were $294/metric ton (mt) for the KS-PNW route and $315/mt for the ND-PNW route. KS-PNW-route transportation costs represented 38 percent of total landed costs, and this share

Figure 1. Total landed costs for shipping wheat (via Pacific Northwest) to Japan, second quarter 2025



Note: PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.
Source: USDA, Agricultural Marketing Service.

Figure 2. Total landed costs for shipping wheat (U.S. Gulf) to Japan, second quarter 2025



Note: PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.
Source: USDA, Agricultural Marketing Service.

was up both quarter to quarter and year to year. ND-PNW-route transportation costs were 33 percent of total landed costs, and this share was down quarter to quarter and up year to year (fig. 1 and table 1).

U.S. Gulf Routes. Second-quarter 2025 total landed costs for shipping to Japan were $293/mt for the KS-Gulf route and $331/mt for the ND-Gulf route. Second-quarter transportation costs were 37 percent of the total KS-Gulf-route landed costs, and this share was up quarter to quarter and up year to year. ND-Gulf-route transportation costs were 36 percent of total landed costs, and this share was up quarter to quarter and up year to year (fig. 2 and table 2).

Second-Quarter 2025 Wheat Inspections

According to USDA's Federal Grain Inspection Service, second-quarter 2025 wheat inspected for export to Japan totaled 0.501 million metric tons (mmt), down 19 percent quarter to quarter and up 2 percent year to year. Of total second-quarter 2025 U.S. wheat inspected for export (6.2 mmt), Japan's share accounted for 8 percent, down 1 percentage point year to year. Year to year, total U.S. wheat exports decreased 9 percent.

According to USDA's August *World Agricultural Supply and Demand Estimates*, the projected total of U.S. wheat exports for marketing year (MY) 2025/26—23.81 mmt—was up 3 percent from the July projection and up 6 percent from the estimate for MY 2024/25.

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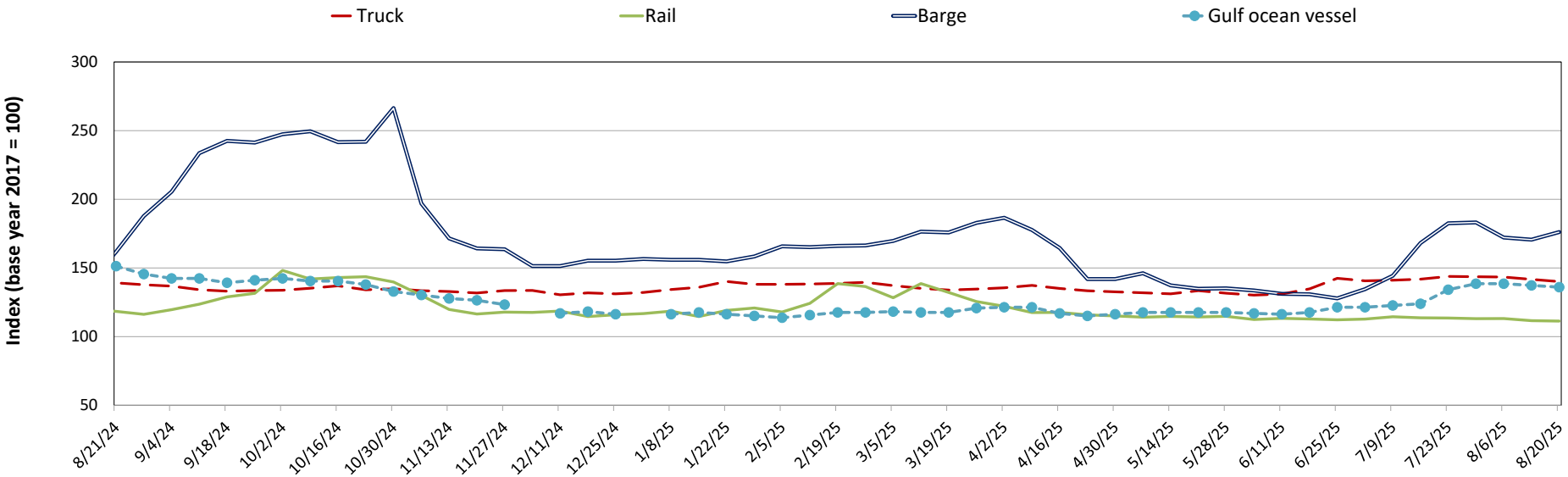
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
08/20/25	140	111	176	136	137
08/13/25	142	112	171	137	137
08/21/24	139	118	162	151	147

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.

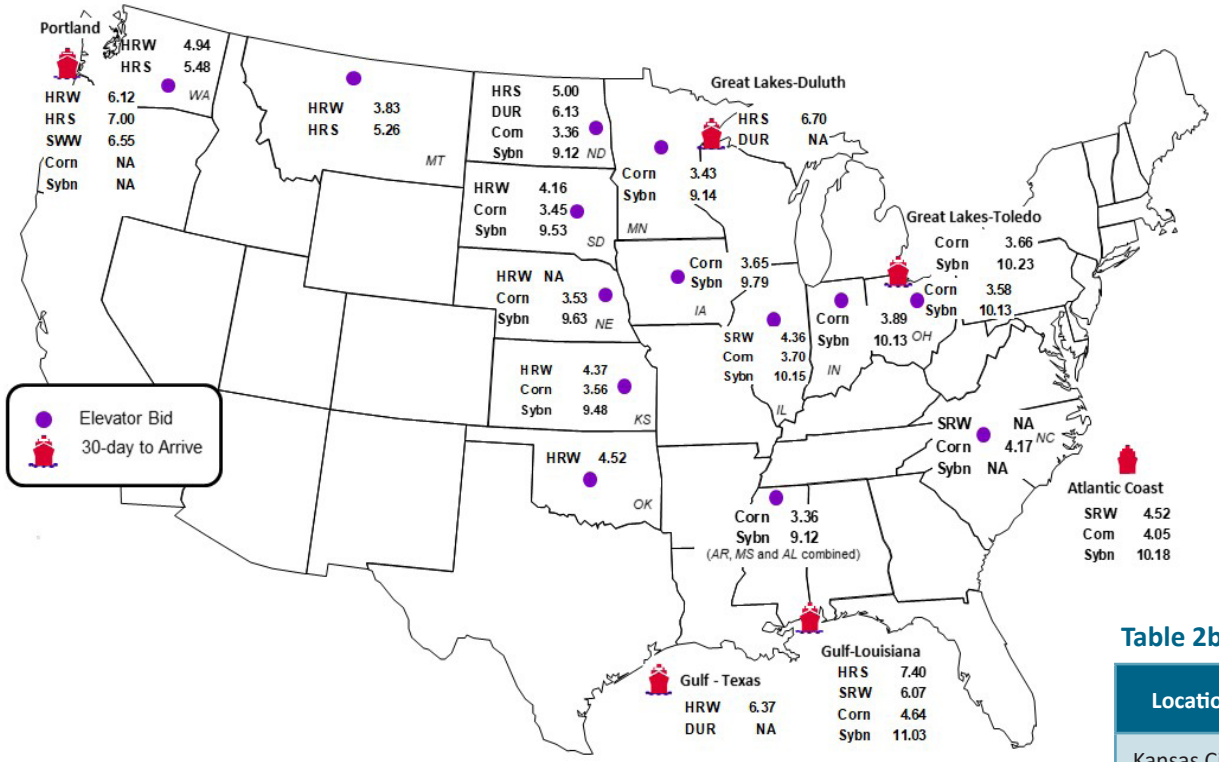
Figure 1. Grain transportation cost indicators as of week ending 8/20/25



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	8/15/2025	8/8/2025
Corn	IL–Gulf	-0.94	-0.97
Corn	NE–Gulf	-1.11	-1.13
Soybean	IA–Gulf	-1.24	-1.25
HRW	KS–Gulf	0.00	-1.95
HRS	ND–Portland	0.00	-2.00

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	8/15/2025	Week ago 8/8/2025	Year ago 8/16/2024
Kansas City	Wheat	Sep	5.282	5.180	5.540
Minneapolis	Wheat	Sep	5.700	5.768	5.932
Chicago	Wheat	Sep	5.268	5.144	5.494
Chicago	Corn	Sep	4.052	4.056	3.966
Chicago	Soybean	Sep	10.344	9.874	9.692

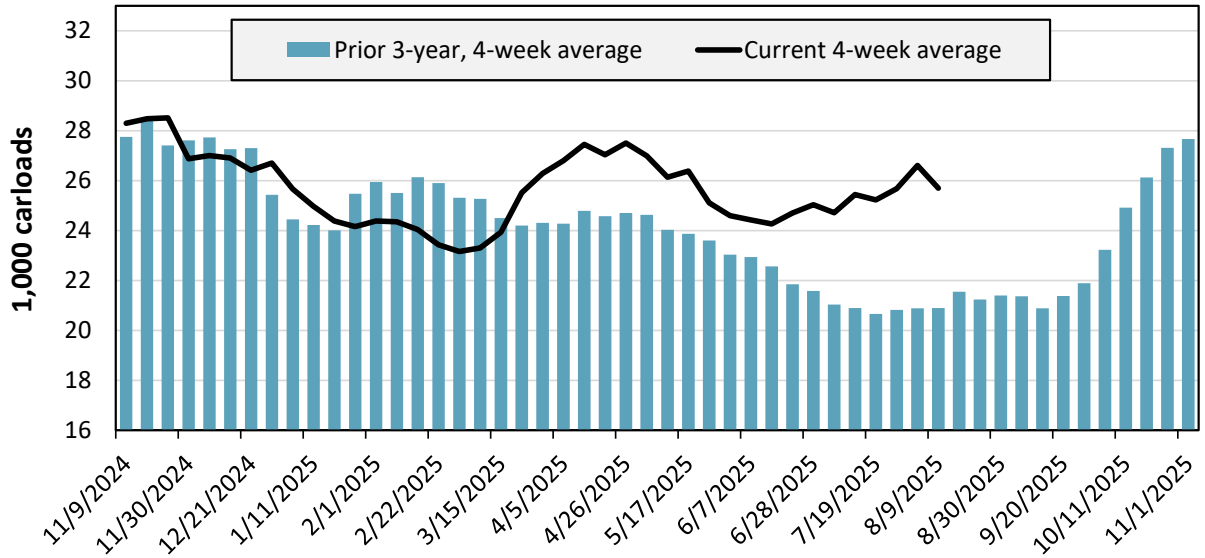
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/09/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,204	2,589	10,791	4,870	2,967	1,530	23,951
This week last year	1,357	2,768	9,531	4,746	3,147	993	22,542
2025 YTD	50,570	89,745	350,969	183,766	87,441	45,120	807,611
2024 YTD	52,829	85,144	330,963	162,749	86,792	29,664	748,141
2025 YTD as % of 2024 YTD	96	105	106	113	101	152	108
Last 4 weeks as % of 2024	79	98	122	125	116	160	117
Last 4 weeks as % of 3-yr. avg.	86	103	133	119	136	136	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 August 9, grain carloads were down 3 percent from the previous week, up 17 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: 8/8/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	15.5	18.6	10.4	15.5	5.7	36.6	17.0
	Average over last 4 weeks	29.3	21.9	12.9	16.4	6.8	36.6	20.7
	Average of same 4 weeks last year	23.6	28.2	28.9	17.5	9.2	n/a	21.4
Average grain unit train speeds (miles per hour)	This week	22.8	20.8	23.7	22.6	22.2	13.9	21.0
	Average over last 4 weeks	22.6	20.1	24.2	22.4	24.3	15.2	21.5
	Average of same 4 weeks last year	23.2	20.5	23.9	22.2	25.3	n/a	23.0

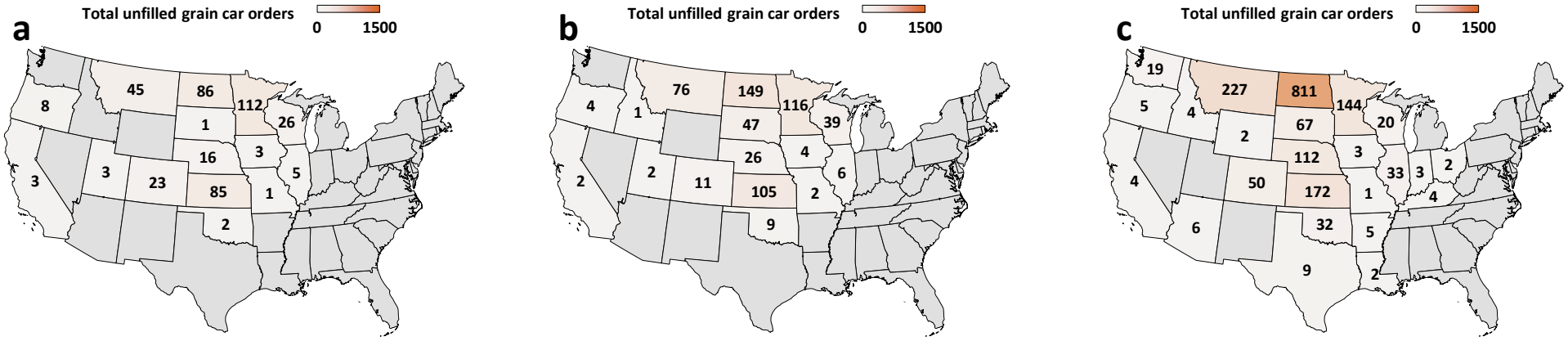
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 8/8/2025		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	11	8	227	82	10	407	746
	Average over last 4 weeks	15	10	238	63	10	378	712
	Average of same 4 weeks last year	17	7	521	101	4	n/a	649
Average number of loaded grain cars not moved in over 48 hours	This week	18	113	219	60	9	1,032	1,450
	Average over last 4 weeks	27	156	254	56	11	1,007	1,511
	Average of same 4 weeks last year	19	160	744	86	5	n/a	1,014
Average number of grain unit trains held	This week	0	1	5	3	0	6	15
	Average over last 4 weeks	0	0	4	5	0	7	16
	Average of same 4 weeks last year	0	0	25	6	0	n/a	31
Total unfilled manifest grain car orders	This week	0	0	160	132	0	127	419
	Average over last 4 weeks	1	0	271	149	0	201	622
	Average of same 4 weeks last year	8	0	1,223	249	1	n/a	1,482

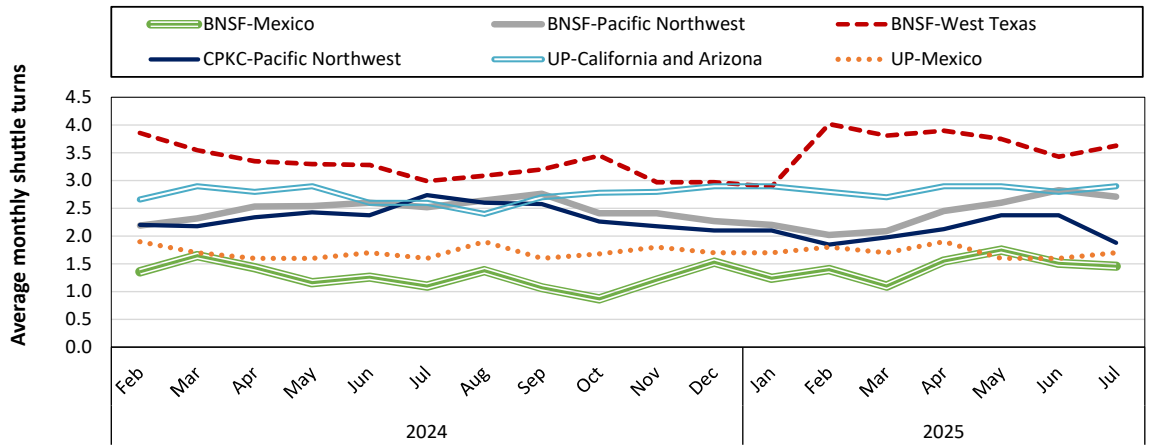
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 8/8/2025 (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

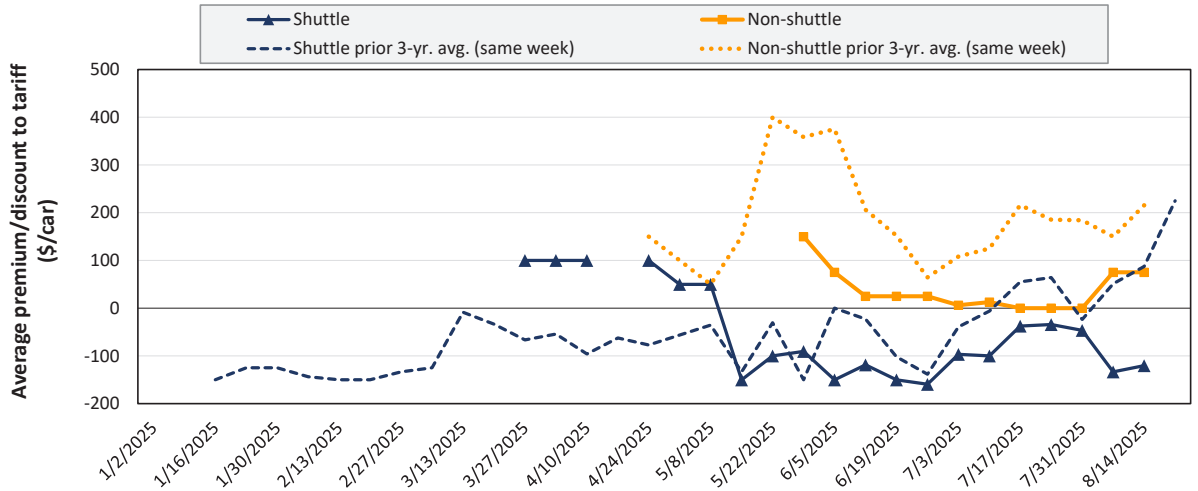


In July 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 1.9 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to Mexico.

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

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

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



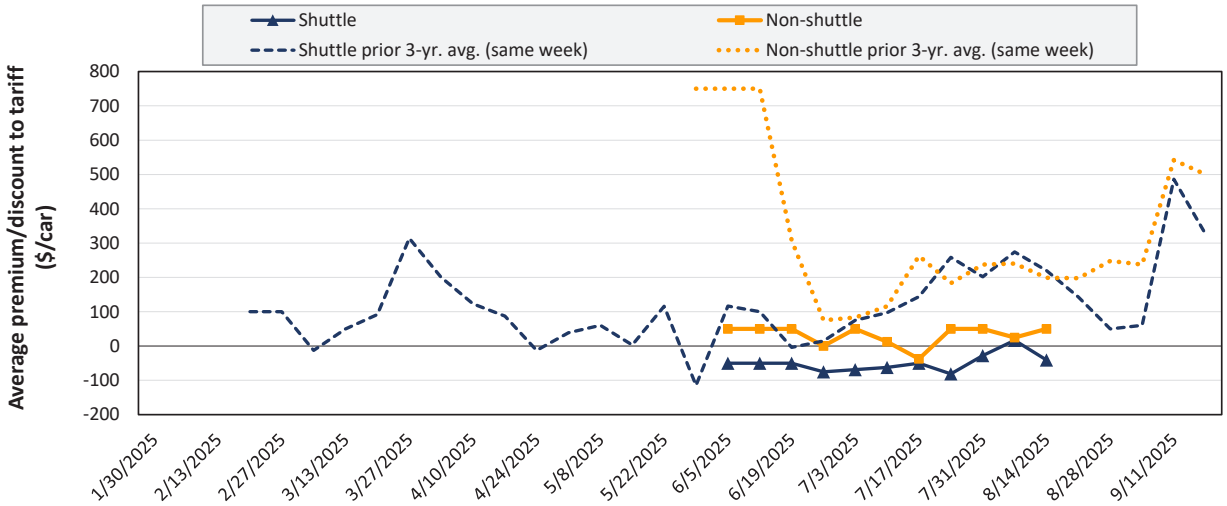
Average non-shuttle bids/offers are unchanged this week, and are $75 below the peak.

Average shuttle bids/offers rose $13 this week and are $220 below the peak.

8/14/2025	BNSF	UP
Non-Shuttle	$75	n/a
Shuttle	-$147	-$94

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



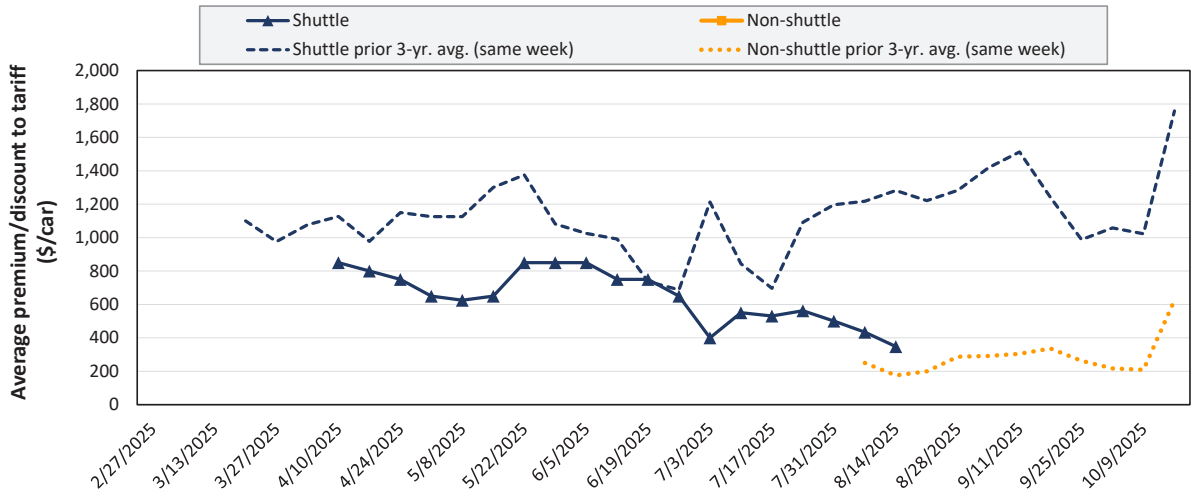
Average non-shuttle bids/offers rose $25 this week, and are at the peak.

Average shuttle bids/offers fell $57 this week and are $57 below the peak.

8/14/2025	BNSF	UP
Non-Shuttle	$150	-$50
Shuttle	-$44	-$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 $86 this week and are $502 below the peak.

8/14/2025	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	$446	$250

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

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

For the week ending: 8/14/2025		Delivery period					
		Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
Non-shuttle	BNSF	75	150	n/a	n/a	n/a	n/a
	Change from last week	0	25	n/a	n/a	n/a	n/a
	Change from same week 2024	-225	-200	n/a	n/a	n/a	n/a
	UP	n/a	-50	n/a	n/a	n/a	n/a
	Change from last week	n/a	25	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-113	n/a	n/a	n/a	n/a
Shuttle	BNSF	-147	-44	446	600	n/a	n/a
	Change from last week	-47	-98	-123	-100	n/a	n/a
	Change from same week 2024	-122	-369	-454	n/a	n/a	n/a
	UP	-94	-38	250	n/a	n/a	n/a
	Change from last week	73	-17	-50	n/a	n/a	n/a
	Change from same week 2024	-194	-313	-325	n/a	n/a	n/a
	CPKC	n/a	100	n/a	n/a	n/a	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	100	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

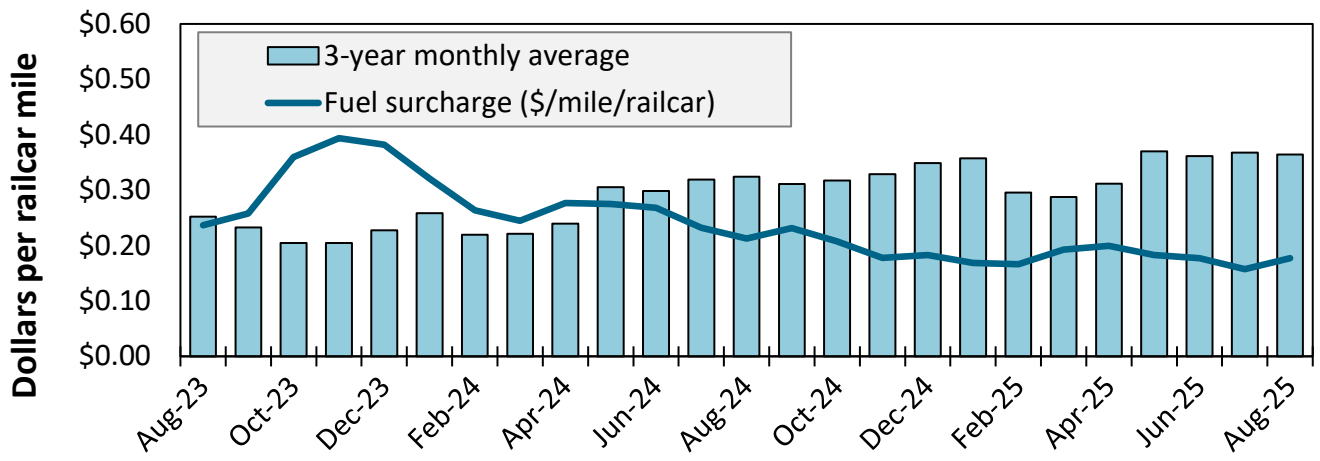
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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	$5,555	$54.67	$1.39	0.7	1.3
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$5,824	$57.32	$1.46	0.7	-3.1
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,459	$53.73	$1.36	0.7	1.4
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,672	$55.82	$1.42	0.7	1.3
	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	$5,555	$54.67	$1.49	0.7	1.3
	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	$5,401	$53.16	$1.45	0.4	-1.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,459	$53.73	$1.46	0.7	1.4
	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	$3,055	$30.07	$0.82	0.5	-26.0
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,855	$28.10	$0.76	0.6	-22.7
	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	$5,459	$53.73	$1.46	0.7	1.4
	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).

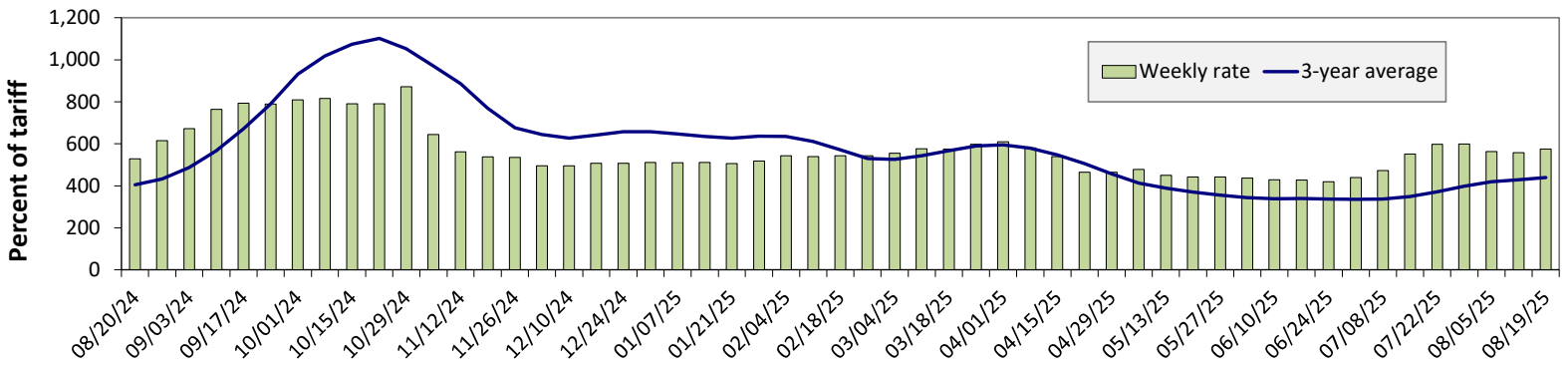
Figure 9. Railroad fuel surcharges, North American weighted average



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 19: 3 percent higher than the previous week; 9 percent higher than last year; and 31 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

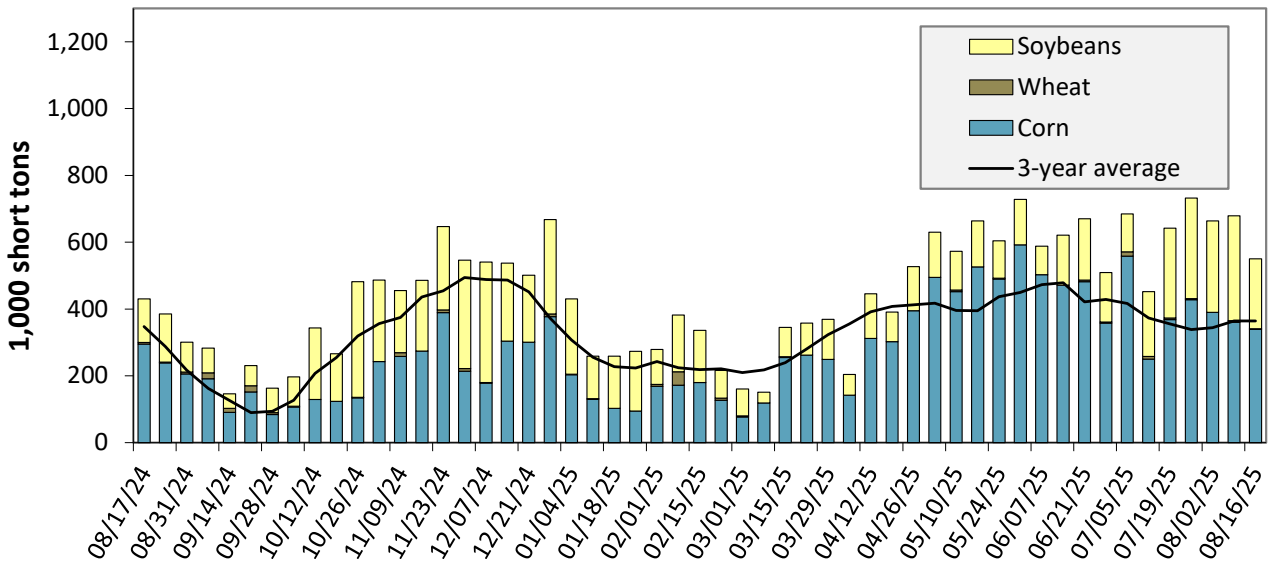
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	8/19/2025	609	592	576	464	483	471
	8/12/2025	596	568	558	449	464	445
$/ton	8/19/2025	37.70	31.49	26.73	18.51	22.65	14.79
	8/12/2025	36.89	30.22	25.89	17.92	21.76	13.97
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	2	10	9	-12	-9	-27
	3-year avg.	14	28	31	21	11	23
Rate	September	755	735	717	698	708	703
	November	682	664	629	562	589	536

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 16: 28 percent higher than last year and 51 percent higher than the 3-year average.

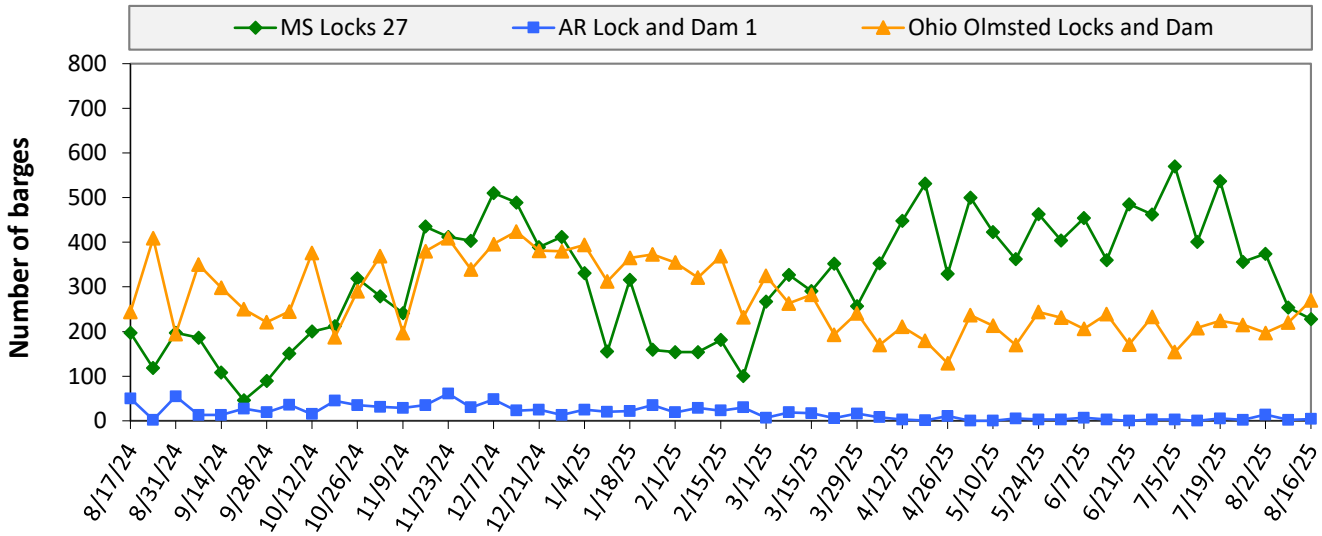
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/16/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	57	0	54	0	110
Mississippi River (Winfield, MO (L25))	191	2	145	0	337
Mississippi River (Alton, IL (L26))	307	2	187	0	496
Mississippi River (Granite City, IL (L27))	339	2	209	0	549
Illinois River (La Grange)	91	0	45	0	136
Ohio River (Olmsted)	27	7	36	2	72
Arkansas River (L1)	0	39	7	0	46
Weekly total - 2025	366	48	252	2	667
Weekly total - 2024	491	48	161	7	706
2025 YTD	13,362	858	7,180	126	21,526
2024 YTD	9,410	1,137	6,658	164	17,369
2025 as % of 2024 YTD	142	75	108	77	124
Last 4 weeks as % of 2024	97	85	152	60	113
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.

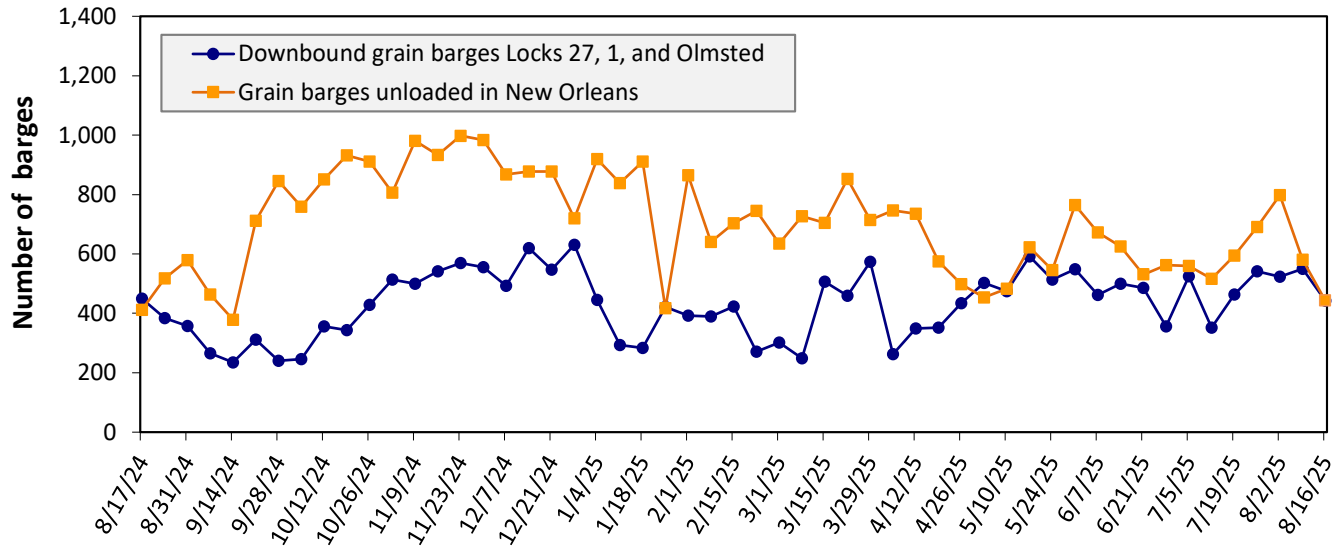
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 16: 502 barges transited the locks, 26 barges more than the previous week, and 14 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 16: 442 barges moved down river, 108 fewer than the previous week; 443 grain barges unloaded in the New Orleans Region, 24 percent fewer than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		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.

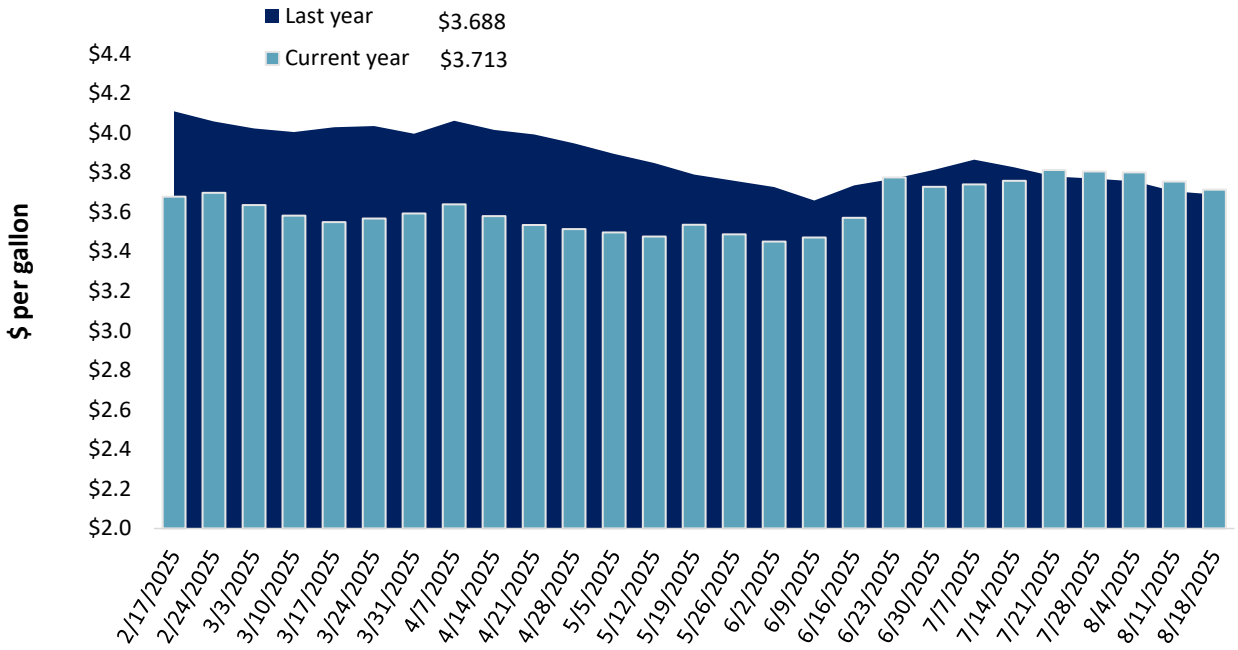
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 08/18/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.733	-0.024	-0.024
	New England	3.969	-0.016	-0.050
	Central Atlantic	3.908	-0.034	-0.027
	Lower Atlantic	3.643	-0.023	-0.021
II	Midwest	3.702	-0.045	0.028
III	Gulf Coast	3.340	-0.057	-0.015
IV	Rocky Mountain	3.757	-0.019	0.107
V	West Coast	4.455	-0.037	0.161
	West Coast less California	4.094	-0.054	0.189
	California	4.871	-0.018	0.132
Total	United States	3.713	-0.041	0.025

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 18, the U.S. average diesel fuel price decreased 4.1 cents from the previous week to $3.713 per gallon, 2.5 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 8/07/2025	2,567	945	1,712	1,475	71	6,770	6,122	2,695	15,586
	This week year ago	1,240	810	1,805	1,093	64	5,012	5,073	2,879	12,963
	Last 4 wks. as % of same period 2023/24	190	120	97	111	122	127	161	122	139
Current shipped (cumulative) exports sales	2024/25 YTD	1,849	693	1,064	530	99	4,236	64,411	48,420	117,067
	2023/24 YTD	867	642	1,236	999	90	3,834	50,744	42,974	97,552
	YTD 2024/25 as % of 2023/24	213	108	86	53	110	110	127	113	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 8/07/2025	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	5,004	23,183	22,455	3	17,746
Japan	1931	13,449	11,017	22	9,366
China	0	33	2,819	-99	8,233
Colombia	695	7,584	6,339	20	4,383
Korea	937	6,278	2,415	160	1,565
Top 5 importers	8,566	50,526	45,045	12	41,293
Total U.S. corn export sales	13,825	70,533	55,817	26	51,170
% of YTD current month's export projection	19%	98%	97%	-	-
Change from prior week	2,048	-89	121	-	-
Top 5 importers' share of U.S. corn export sales	62%	72%	81%	-	81%
USDA forecast August 2025	73,029	71,632	57,280	25	-
Corn use for ethanol USDA forecast, August 2025	142,240	138,938	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 8/07/2025	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	24,508	-8	28,636
Mexico	1,394	5,066	4,823	5	4,917
Japan	205	2,146	2,164	-1	2,231
Egypt	161	3,622	1,528	137	2,228
Indonesia	76	2,060	2,216	-7	1,910
Top 5 importers	1,837	35,371	35,239	0	39,922
Total U.S. soybean export sales	4,712	51,115	45,853	11	51,302
% of YTD current month's export projection	10%	100%	99%	-	-
Change from prior week	1133	-378	137	-	-
Top 5 importers' share of U.S. soybean export sales	39%	69%	77%	-	78%
USDA forecast, August 2025	46,403	51,029	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 8/07/2025	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	1,820	1,504	21	3,358
Philippines	1,148	1,078	6	2,473
Japan	805	751	7	2,045
China	0	139	-100	1,137
Korea	765	848	-10	1,674
Taiwan	398	449	-11	935
Thailand	233	294	-21	667
Nigeria	611	163	274	629
Indonesia	498	357	39	518
Colombia	336	149	125	489
Top 10 importers	6,613	5,733	15	13,926
Total U.S. wheat export sales	11,005	8,846	24	19,135
% of YTD current month's export projection	46%	39%	-	-
Change from prior week	723	340	-	-
Top 10 importers' share of U.S. wheat export sales	60%	65%	-	73%
USDA forecast, August 2025	23,814	22,480	6	-

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.

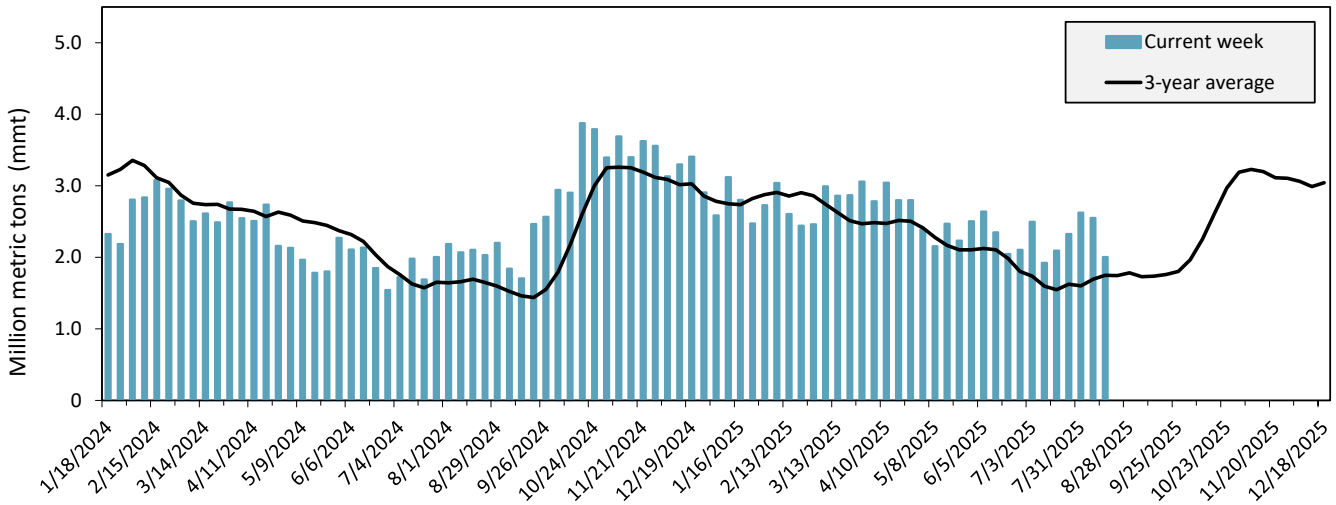
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 08/14/2025	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	248	507	49	15,439	11,441	135	161	331	13,987
	Soybeans	0	0	n/a	1,966	2,533	78	n/a	n/a	10,445
	Wheat	146	147	99	6,644	6,955	96	63	81	11,453
	All grain	394	654	60	24,165	22,015	110	107	152	37,186
Mississippi Gulf	Corn	384	552	70	23,058	16,891	137	97	135	27,407
	Soybeans	330	386	86	12,366	12,741	97	168	117	29,741
	Wheat	57	148	38	2,492	3,223	77	123	85	4,523
	All grain	771	1,085	71	37,956	32,915	115	117	123	61,789
Texas Gulf	Corn	46	49	95	309	326	95	260	168	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	105	60	174	2,762	1,098	251	202	253	1,940
	All grain	235	179	132	3,592	3,854	93	114	131	6,965
Interior	Corn	343	371	92	8,969	8,680	103	122	177	13,463
	Soybeans	138	157	88	4,270	4,478	95	105	128	8,059
	Wheat	76	56	135	1,963	1,920	102	96	113	2,989
	All grain	557	585	95	15,529	15,222	102	113	151	24,791
Great Lakes	Corn	0	23	0	64	0	n/a	n/a	-	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	10	0	n/a	165	292	56	29	63	653
	All grain	10	23	42	229	310	74	75	151	1,060
Atlantic	Corn	30	20	148	242	213	114	520	759	410
	Soybeans	6	2	389	490	439	112	-	153	1,272
	Wheat	2	4	58	50	27	182	102	51	73
	All grain	38	25	150	781	679	115	397	199	1,754
All Regions	Corn	1,051	1,523	69	48,081	37,551	128	119	177	56,109
	Soybeans	474	544	87	19,301	20,263	95	145	114	50,865
	Wheat	395	415	95	14,076	13,516	104	91	102	21,631
	All grain	2,005	2,552	79	82,357	75,049	110	114	136	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.

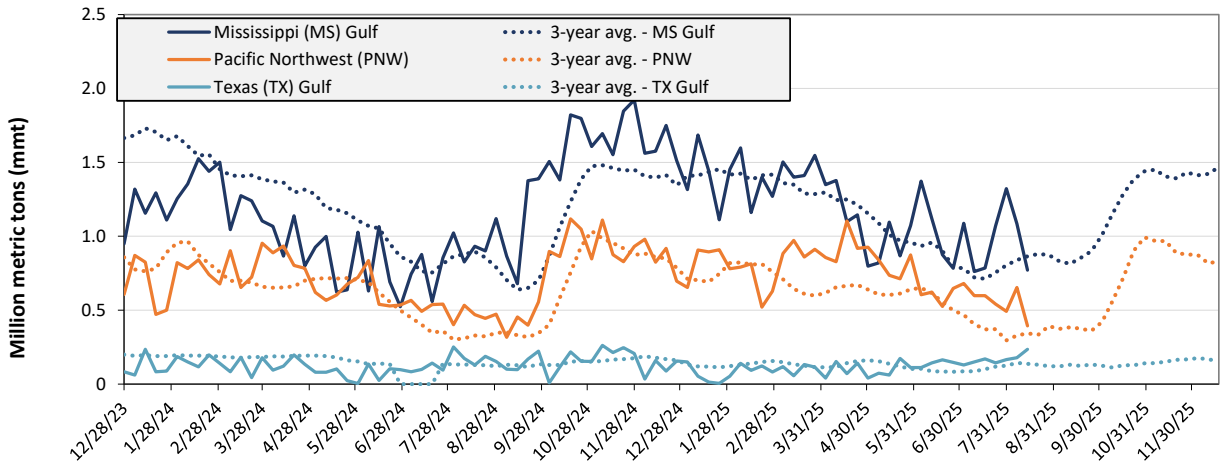
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 14: 2 mmt of grain inspected, down 21 percent from the previous week, down 3 percent from the same week last year, and up 15 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 08/14/25 inspections (mmt):
MS Gulf: 0.77
PNW: 0.39
TX Gulf: 0.24

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 29	up 32	down 20	down 40
Last year (same 7 days)	down 19	up 102	down 6	un changed
3-year average (4-week moving average)	down 11	up 71	un changed	up 15

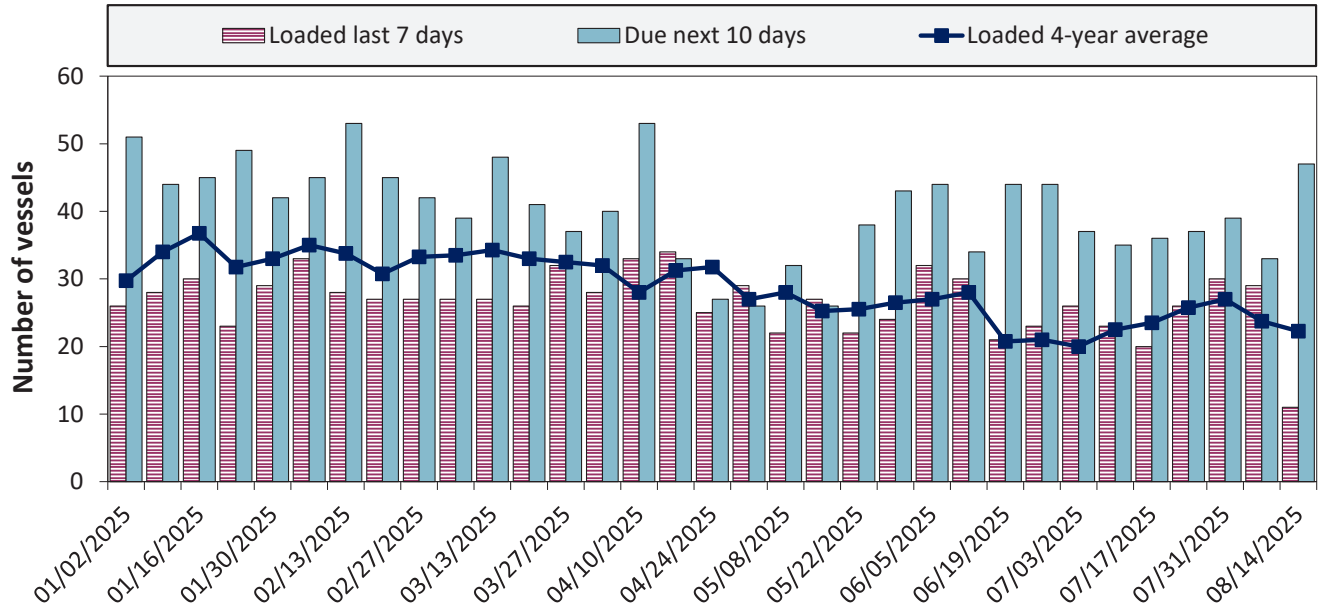
Source: USDA, Federal Grain Inspection Service.

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
8/14/2025	26	11	47	10
8/7/2025	18	29	33	5
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.

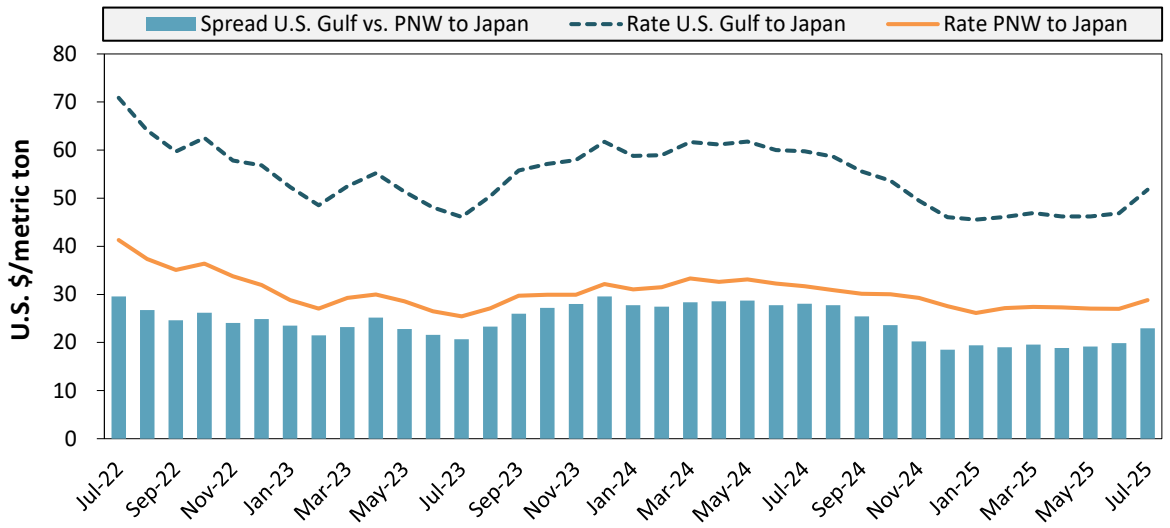
Figure 19. U.S. Gulf vessel loading activity



Week ending 08/14/25, number of vessels	Loaded	Due
Change from last year	-48%	7%
Change from 4-year average	-51%	34%

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.

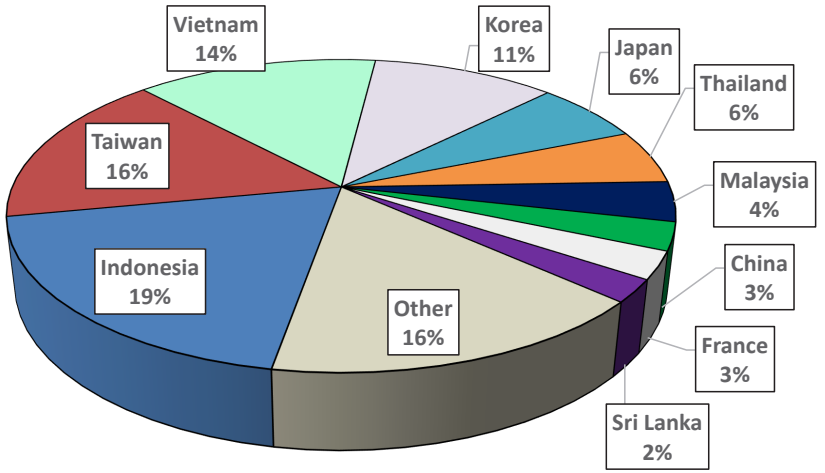
Table 20. Ocean freight rates for selected shipments, week ending 8/16/2025

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	Aug 12, 2025	Oct 1/10, 2025	58,000	63.75
U.S. Gulf	S. Korea	Heavy grain	Aug 7, 2025	Sep 1/10, 2025	58,000	62.50
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
EC S. America	China	Heavy grain	May 16, 2025	Jun 12/22, 2025	80,000	33.40
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.

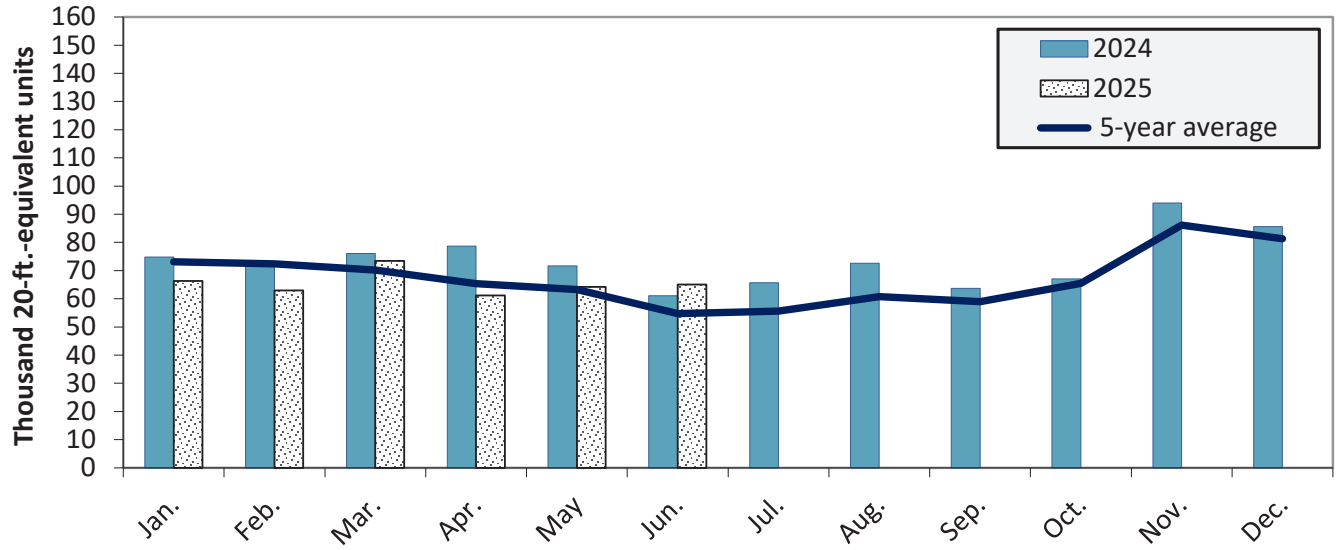
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-June 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 June 2025 were up 6.5 percent from last year and up 18.8 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 PIERS data, S&P Global.

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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. August 21 2025.
Web: **http://dx.doi.org/10.9752/TS056.08-21-2025**

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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