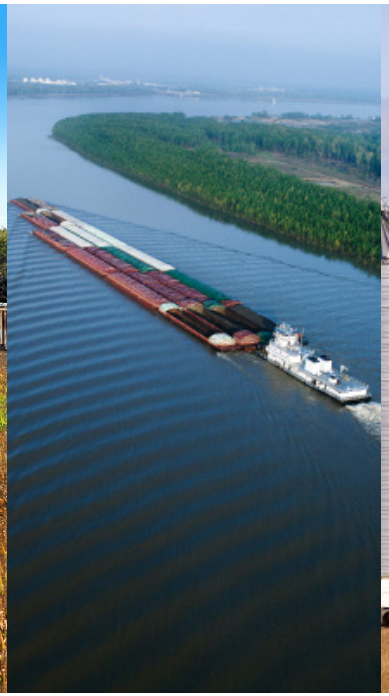
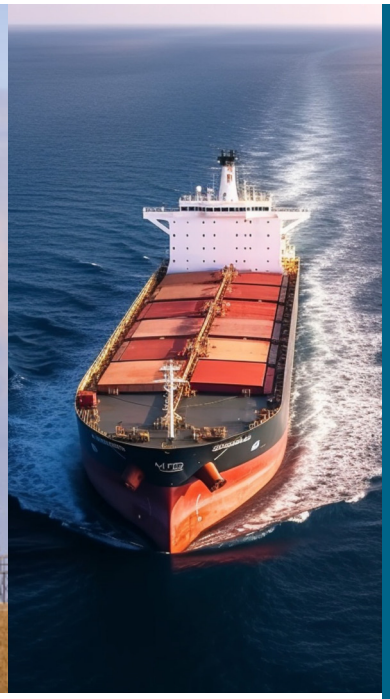
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

August 28, 2025
A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

Rail Service Mostly Good Heading Into Harvest. According to the latest STB service metrics (available on AgTransport), Class I railroads are generally well positioned as harvest begins. For the service week ending August 15, compared to the same period last year, the industry's origin dwell times averaged 19.2 hours (10 percent lower); the number of unfilled grain car orders (in manifest service) was 151 (334 fewer); and the number of grain cars not moved (in more than 48 hours) was 1,642 (11 percent lower).

Although some of CPKC's metrics have been historically poor (*Grain Transportation Report (GTR), August 14, 2025, second highlight*), the railroad has reduced the number of grain cars not moved by almost 1,100 cars over the past 2 weeks—a 57-percent drop. Excluding CPKC, (for the service week ending August 15) Class I grain train speeds were on par with the same week last year—2 percent slower than last year. Grain carloads have been strong for months (GTR fig. 3): since April, compared to last year, Union Pacific Railroad has originated 18 percent more; CPKC, 17 percent more; and BNSF Railway, 11 percent more.

For additional insight into the railroads' readiness to handle this year's projected record harvest, see this week's feature article.

Wheat Export Inspections Reach Highest Levels in 12 Years. According to USDA's Federal Grain Inspection Service (available on AgTransport), in the week ending August 21, wheat inspected for export totaled 946,000 metric tons (mt)—the highest weekly total since September 2013 (GTR table 18).

For the same week, wheat shipments by port region were as follows: Columbia River, 466,000 mt; Mississippi River, 138,000 mt; North Texas, 127,000 mt; South Texas, 100,000 mt; Interior, 85,000 mt; Puget Sound, 28,000 mt; and South Atlantic, 2,000 mt.

Also, for the week ending August 21, the three leading destinations were Indonesia, 151,000 mt; Philippines, 147,000 mt; and South Korea, 143,000 mt. Last month, Indonesia's flour milling association committed to purchasing 1 million mt of U.S.-grown wheat each year for the next 5 years.

BNSF and CPKC Prefer Interline Partnerships Over Mergers. Over the past week, BNSF Railway (BNSF) and Canadian Pacific Kansas City (CPKC) separately expressed their hesitation to pursue a merger with another Class I carrier, while also supporting more interline cooperation. The railroads' comments appeared less than a month after Union Pacific Railroad announced its intent to acquire Norfolk Southern Railway (*GTR, July 31, 2025, first highlight*).

In a recent interview, Warren Buffett (whose company, Berkshire Hathaway, owns BNSF) said he is not interested in acquiring CSX. Instead, BNSF and CSX announced a new coast-to-coast intermodal rail partnership. Containerized grain shippers may benefit from direct intermodal service between Kansas City and the Port of Norfolk.

In an August 26 press release, with sentiments similar to Buffett's, CPKC described itself as "not interested in participating in immediate rail industry consolidation" because any major rail merger "poses unique and unprecedented risks." Instead, CPKC believes many of the benefits of a merger can be achieved through "expanded industry partnerships, customer service innovations and additional cooperation among railways."

UP Urges STB To Regulate Planned Eagle Pass Short Line Construction. Earlier this week, Union Pacific Railroad (UP) submitted comments to the Surface Transportation Board (STB) on the transportation merits of Green Eagle Railroad's (GER) proposal to build a short line railroad and bridge at the Eagle Pass, TX, border crossing. GER intends to replace UP's current border-crossing bridge (*GTR, December 21, 2023, second highlight*). However, UP does not plan to move traffic to GER.

In its comments, UP asked STB to deny GER's request for an exemption from rail construction licensing requirements. UP characterizes the GER proposal as one of the rare cases in which regulating a relatively small construction project is necessary to carry out the Nation's rail transportation policy. Specifically, UP believes the proposal would not benefit shippers, because an additional rail carrier at Eagle Pass would not create a competitive alternative to existing rail services. Additionally, UP does not believe that GER's proposed track length is sufficient to accommodate the length of cross-border trains. The Eagle Pass gateway is the second busiest crossing between the United States and Mexico, and it is a key crossing for grain traffic—particularly soybeans.

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 14, **unshipped balances** of corn and soybeans totaled 7.23 million metric tons (mmt), down 18 percent from last week and up 12 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 6.93 mmt, up 2 percent from last week and up 38 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were –0.03 mmt, up 69 percent from last week. Net **soybean export sales** were –0.006 mmt, up 98 percent from last week. Net **wheat export sales** for MY 2025/26 were 0.52 mmt, down 28 percent from last week.

Rail

U.S. Class I railroads originated 25,476 **grain carloads** during the week ending August 16. This was a 6-percent increase from the previous week, 3 percent more than last year, and 13 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $25 below tariff for the week ending August 21. This was $16 more than last week and $25 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $13 above tariff. This was $38 less than last week and $198 lower than this week last year.

Barge

For the week ending August 23, **barged grain movements** totaled 485,078 tons. This was 27 percent less than the previous week and 16 percent less than the same period last year.

For the week ending August 23, 309 grain barges **moved down river**—133 fewer than last week. There were 682 grain barges **unloaded** in the New Orleans region, 54 percent more than last week.

Ocean

For the week ending August 21, 25 **oceangoing grain vessels** were loaded in the Gulf—25 percent more than the same period last year. Within the next 10 days (starting August 22), 49 vessels were expected to be loaded—11 percent more than the same period last year.

As of August 21, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $53.25, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $28.50 per mt, down 1 percent from the previous week.

Fuel

For the week ending August 25, the **U.S. average diesel fuel price** decreased 0.5 cents from the previous week to $3.708 per gallon, 5.7 cents above the same week last year.

STB, Shippers, and Railroads Discuss Upcoming Harvest at Annual NGCC Meeting

On August 19, the Surface Transportation Board (STB) convened its annual National Grain Car Council (NGCC) meeting in Kansas City, MO, to discuss issues relevant to grain transportation, including railroads' preparedness to handle the fall harvest.[1] NGCC consists of representatives from Class I railroads, short line railroads, shippers, receivers, rail equipment manufacturers, and lessors.

Overall, shippers and STB members are pleased with the Class I railroads' current performance. However, the record corn harvest and (current) lack of soybean exports make this year "unusual." This article summarizes the meeting, while weaving in additional context and insight.

Shippers Prepare For an "Unusual" Year

The NGCC meeting began with an economic overview of the grains market, which was followed by a shipper/receiver panel.[2] The panelists identified two themes that will impact grain rail movements this fall: a record corn crop and changing soybean demand.

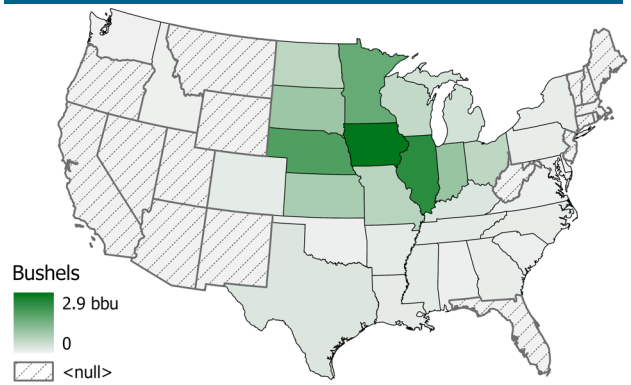
Record Corn Crop. In USDA's August *World Agricultural Supply and Demand Estimates (WASDE) report*, corn production was forecast at a record 16.7 billion bushels (bbu) for marketing year (MY) 2025/26, which if realized, would be 1.4 bbu more than the MY 2023/24 record. Projected MY 2025/26 corn production was higher than MY 2024/25 because of both higher planted acres (97.3 million acres, up 7 percent from last year) and higher projected yield (188.8 bushels per acre, up 5 percent from last year).

Figure 1a shows USDA-projected corn production by State in MY 2025/26. Of these, the top five States are Iowa (2.87 bbu); Illinois (2.39 bbu); Nebraska (1.93 bbu); Minnesota (1.65 bbu); and Indiana (1.06 bbu). Figure 1b shows corn production is projected to increase not only nationally, but also in most States. Of the surveyed States, year-to-year declines in production are projected for only Washington and New York.

The top five States—by their increase in corn production from MY 2024/25 to MY 2025/26 (in descending order)—are as follows: Minnesota (up 309 mbu, a 23-percent increase); Iowa (+248 mbu, +9 percent); Nebraska (+129 mbu, +7 percent); South Dakota (+121 mbu, +14 percent); and Kansas (+114 mbu, +15 percent). Large production increases in the western Corn Belt suggest increased demand for BNSF Railway (BNSF) and Union Pacific Railroad (UP).

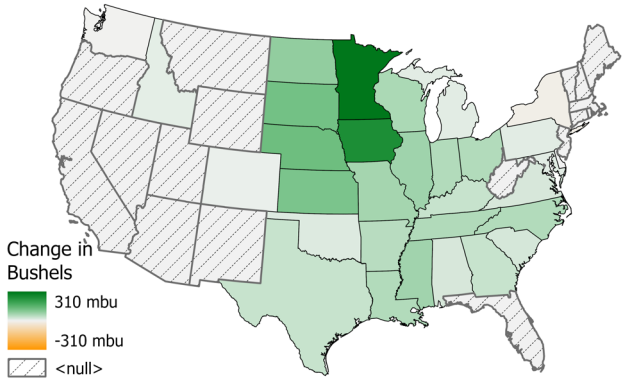
The rising corn production is likely to put pressure on storage systems in corn-producing States and raise transportation demand throughout the year. USDA's *WASDE* report also

Figure 1a. Corn production by State, 2025/26



Source: USDA/Agricultural Marking Service analysis of data from USDA/National Agricultural Statistics Service August *Crop Production* report.

Figure 1b. Change in State corn production, 2025/26 vs. 2024/25



Source: USDA/Agricultural Marking Service analysis of data from USDA/National Agricultural Statistics Service August *Crop Production* report.

1 NGCC is an advisory body founded by the Interstate Commerce Commission (STB's predecessor agency) in 1994. In addition to advising STB on grain-related matters, the NGCC provides a forum for the resolution of disputes and controversies regarding grain transportation.

2 The panel included a moderator and representatives from Cargill, Scoular, Ag Processing Inc., and Zen-Noh Grain Corp.

projected increases in corn use for feed, ethanol, and exports. Panelists at NGCC all voiced their expectations of strong corn transportation demand for both domestic use and export. One presenter highlighted strong export sales to Mexico, Japan, and South Korea (for MY 2024/25 and MY 2025/26). However, panelists emphasized the timing of corn transportation demand will rest largely on soybean demand.

Shifts in Soybean Demand. In recent years, about half of all U.S. soybean exports ship from October to December (right after harvest), when U.S. soybean prices are typically lowest. However, this year's export sales may be challenged, because China (historically, the largest buyer of U.S. soybeans) has yet to book its first sales for MY 2025/26.

Without China's immediate, post-harvest demand, the large corn harvest may complicate elevators' ability to secure storage for soybeans. One NGCC panelist noted that rail service is the best it has been in years and any bottlenecks will likely occur at the origins, because of potential storage shortages. In the absence of soybean exports to China, Pacific Northwest (PNW) terminals will likely pivot to exporting corn to Japan and South Korea—where export sales are near record levels.

Another panelist noted recent U.S. energy policy changes will result this year in record soybean crush, which will absorb some soybeans that otherwise would have been exported. Still, with the growth of soybean crushing and relative stability in U.S. livestock numbers, excess soybean meal (a byproduct of crushing) will need to be exported from ports such as Grays Harbor near Aberdeen, WA. Railroads will play a role in transporting soybean meal to export terminals.

Short Line Railroads Ready for Harvest

The NGCC short line panel reported having sufficient locomotives, crews, and railcars to serve their customers. One representative cited improved employee retention rates and their workforce's "much better position" than 18 to 36 months ago. As the first and last mile of roughly 20 percent of all rail carloads, short lines are critical to the broader rail network.

The panelists stressed the role of Federal programs in maintaining and upgrading their infrastructure. Often operating on lower density routes, short lines lack the revenue required for major capital projects. Programs like the Consolidated Rail Infrastructure and Safety Improvements (CRISI) grants and the "45G" tax credit have enabled billions of dollars in private and public investment to upgrade track, bridges, and other infrastructure to handle modern, heavy-axle railcars safely and efficiently. Legislative efforts are now underway to raise the 45G tax credit to account for 20 years of inflation and expand eligibility to include track acquired since 2015.

A significant challenge facing short lines is their aging railcar fleets, many of which still consist of older, smaller 4,750-cubic-foot hopper cars. At 50 years old, a freight car generally can no longer be interchanged with other railroads and must be replaced.

Class I Railroads Express Confidence in Harvest Rail Service

As summarized below, all Class I railroads expressed confidence in their ability to handle the increased corn and soybean harvest.

In the West. BNSF, the largest Class I railroad in terms of total grain originations, will maintain a covered hopper fleet of 32,000 cars. Similar to last year, BNSF will offer 140 shuttle trains, 20 direct destination efficiency trains (DETs), and 30 regular DETs—in addition to single cars for manifest service. The railroad expects healthy demand to the PNW, West Texas, Mexico, and the Gulf, and BNSF has positioned locomotives throughout the Upper Great Plains. Over the past year, BNSF added 1,100 new high-efficiency jumbo hopper cars and 300 locomotives. BNSF emphasized its improved performance over the past year, including 95 percent fewer past due orders. One STB member, who had expressed concerns last year, commended these improvements.

UP highlighted its sustained improved service over the past 2.5 years—a significant turnaround from 3 years ago, which STB recognized. UP also emphasized its improved readiness—both in its extensive communication with customers to pre-position equipment for harvest and the firm's "additional buffer resources available" to handle unexpected shifts in volume and geography.

Although UP acknowledged its recently announced plans to acquire Norfolk Southern Railway (NS), the anticipated merger was not discussed at NGCC because the transaction is a pending matter before STB.[3]

3 The UP/NS merger is filed under Finance Docket No. 36873. On July 30, UP and NS filed a notice of intent to file a merger application with the STB, where the firms indicated their intent to file an application on or before January 29, 2026.

In the East. Because the Southeast is a grain-deficit region (owing to its large poultry and livestock industries), grain transportation demand for the eastern Class I railroads softens when the Southeastern crop is large and Southeast demand for imports wanes. Thus, both NS and CSX Transportation (CSX) anticipate lower demand because of a strong Southeastern crop (fig. 1b). In contrast, last year, NS benefited from the Southeast's below-average crop: the railroad reported its 2024 grain carloads were *30 percent above* 2023.

Neither NS nor CSX forecast significant changes to their grain programs from prior years, and both firms expect their resources for this year—unit train sets, cars, train and engine employees, and locomotives—to resemble last year's. In the next month or two, CSX expects to reopen its Blue Ridge Subdivision, which was heavily damaged last year following floods from Hurricane Helene (*Grain Transportation Report (GTR), October 3, 2024, third highlight*). CSX also expects to soon complete its upgrades to the Howard Street tunnel (in Baltimore, MD), which has been closed since February. The tunnel upgrades will enable double-stacking of intermodal containers. Both re-openings should improve network fluidity for grain and ethanol shippers.

Canada and Central United States. Canadian National Railway (CN) has added locomotives to its fleet, allowing it to respond quickly to any unexpected shifts in demand, such as might arise with any issues that show up along the Mississippi River. (CN's track runs parallel to the Mississippi River and can act as a substitute for some diverted barge traffic during river disruptions.) CN also emphasized its successful integration of Iowa Northern Railway customers after acquiring the line earlier this year (GTR, February 13, 2025).

Canadian Pacific Kansas City (CPKC) is deploying 140 dedicated shuttles across its network (both United States and Canada) and introducing its dedicated train program to its southern network (formerly, Kansas City Southern Railway (KCS)), as part of its full network integration. CPKC discussed the recent merger's impacts, including the access it has given shippers in the Upper Great Plains to markets in the U.S. Gulf and Mexico. However, CPKC's computer system cutover (back in May) negatively affected customers on the legacy KCS network (GTR, August 14, 2025, second highlight). CPKC noted its significant progress in improving service for its legacy KCS customers.

Mexico. Notably, the Mexican carrier Ferromex (FXE) joined the Class I railroad panel to discuss expectations for rail service in Mexico—a major area of concern at last year's NGCC meeting (GTR, August 29, 2024). FXE is not subject to regulation by STB (because it operates outside of the United States). Nevertheless, its inclusion in the NGCC shows the importance of seamless rail connections between the United States and Mexico, the top exported grain buyer.

FXE expects record-high demand, breaking last year's record (because of drought in Mexico). FXE expressed optimism that last year's service problems would not recur because of operational improvements and external factors (i.e., declines in migration to U.S. border). Detailing FXE's improvements, the firm highlighted the readiness of its crew; coordination with other Class I railroads (through a new "grain desk"); 60 additional locomotives; and capital expenditures. FXE expects to handle 135 unit and shuttle trains from the border each month through the rest of the year. FXE also said it had resolved more recent issues for service to Guadalajara stemming from a fatal train derailment (GTR, August 21, 2025, first highlight).

Assessment and Wrap-Up

Overall, transportation service was not a major concern for shippers or railroads at this year's NGCC meeting. The biggest questions surrounded the timing of soybean demand and its impact on moving the projected record corn crop. Railroads said they were ready for grain harvest season—ready to move both corn and soybeans.

In closing the meeting, STB members emphasized the importance of these kinds of dialogues to maintaining an efficient grain transportation system. They also stressed, amid demand uncertainties, the need for grain shippers and railroads to continue communicating throughout the harvest season.

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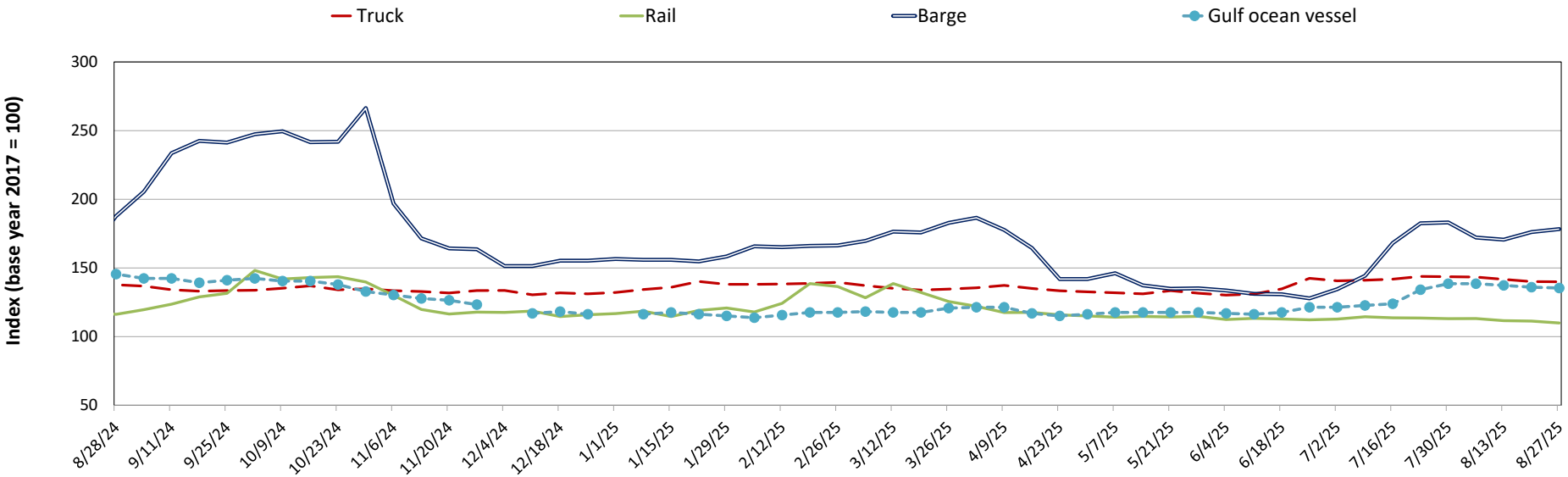
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
08/27/25	140	110	178	135	135
08/20/25	140	111	176	136	137
08/28/24	138	116	188	146	145

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.

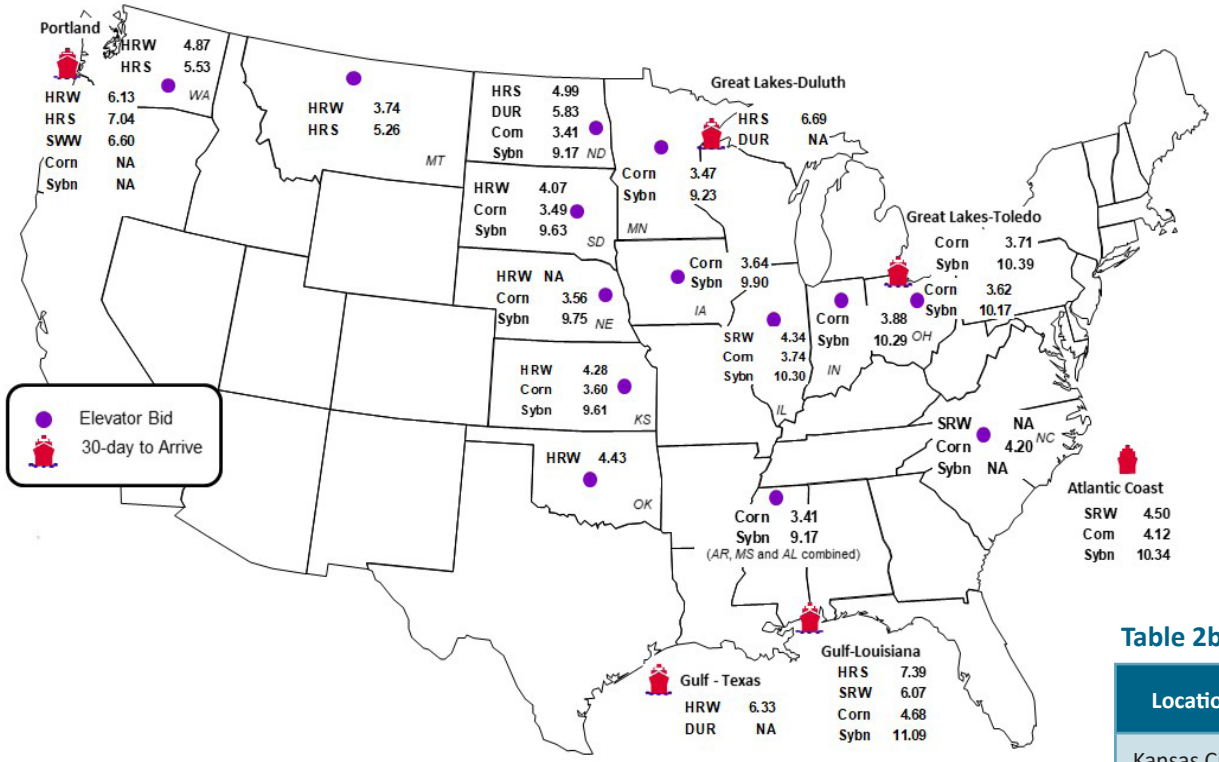
Figure 1. Grain transportation cost indicators as of week ending 8/27/25



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	8/22/2025	8/15/2025
Corn	IL–Gulf	-0.94	-0.94
Corn	NE–Gulf	-1.12	-1.11
Soybean	IA–Gulf	-1.19	-1.24
HRW	KS–Gulf	-2.05	-2.00
HRS	ND–Portland	-2.05	-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	8/22/2025	Week ago 8/15/2025	Year ago 8/23/2024
Kansas City	Wheat	Dec	5.210	5.282	5.362
Minneapolis	Wheat	Dec	5.900	5.700	5.722
Chicago	Wheat	Dec	5.272	5.268	5.302
Chicago	Corn	Dec	4.114	4.052	3.912
Chicago	Soybean	Dec	10.584	10.344	9.730

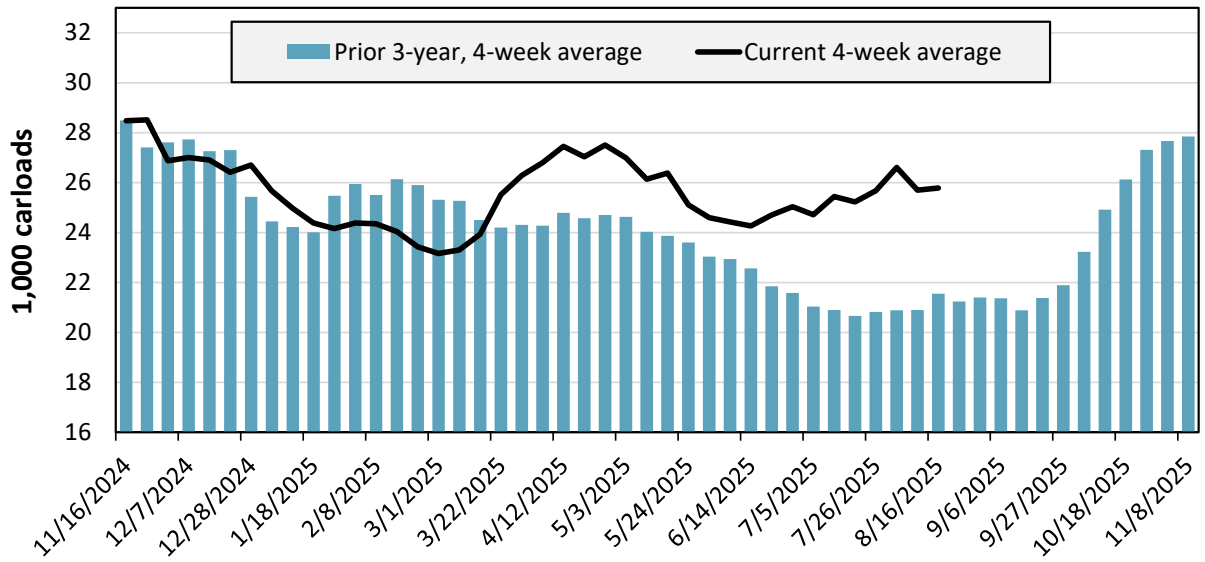
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/16/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,342	2,233	11,915	5,491	3,259	1,236	25,476
This week last year	2,241	3,266	10,192	5,952	2,343	789	24,783
2025 YTD	51,912	91,978	362,884	189,257	90,700	46,356	833,087
2024 YTD	55,070	88,410	341,155	168,701	89,135	30,453	772,924
2025 YTD as % of 2024 YTD	94	104	106	112	102	152	108
Last 4 weeks as % of 2024	80	86	118	111	122	159	112
Last 4 weeks as % of 3-yr. avg.	85	95	131	109	140	145	120
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 16, grain carloads were unchanged from the previous week, up 12 percent from last year, and up 20 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: 8/15/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	22.3	22.8	16.0	13.5	8.3	31.1	19.0
	Average over last 4 weeks	27.4	22.6	13.3	15.2	6.8	35.8	20.2
	Average of same 4 weeks last year	21.1	27.5	26.6	17.7	8.2	n/a	20.2
Average grain unit train speeds (miles per hour)	This week	22.4	19.0	23.5	22.2	24.1	14.5	21.0
	Average over last 4 weeks	22.7	20.0	23.8	22.2	24.1	15.1	21.3
	Average of same 4 weeks last year	23.3	20.4	23.4	22.1	25.2	n/a	22.9

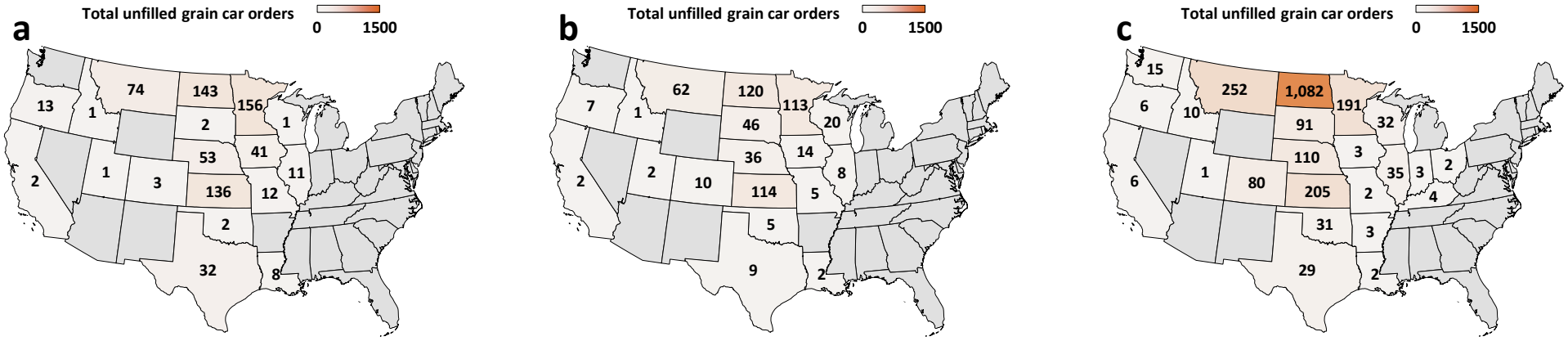
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 8/15/2025		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	6	183	54	4	282	540
	Average over last 4 weeks	12	6	220	65	9	380	692
	Average of same 4 weeks last year	17	6	494	116	5	n/a	637
Average number of loaded grain cars not moved in over 48 hours	This week	18	76	422	51	8	527	1,102
	Average over last 4 weeks	25	136	276	56	9	947	1,450
	Average of same 4 weeks last year	25	151	704	97	5	n/a	981
Average number of grain unit trains held	This week	0	0	3	4	0	12	19
	Average over last 4 weeks	0	0	4	4	0	8	17
	Average of same 4 weeks last year	0	0	23	7	0	n/a	30
Total unfilled manifest grain car orders	This week	0	3	173	284	0	231	691
	Average over last 4 weeks	1	1	229	183	0	178	591
	Average of same 4 weeks last year	8	1	1,588	341	1	n/a	1,939

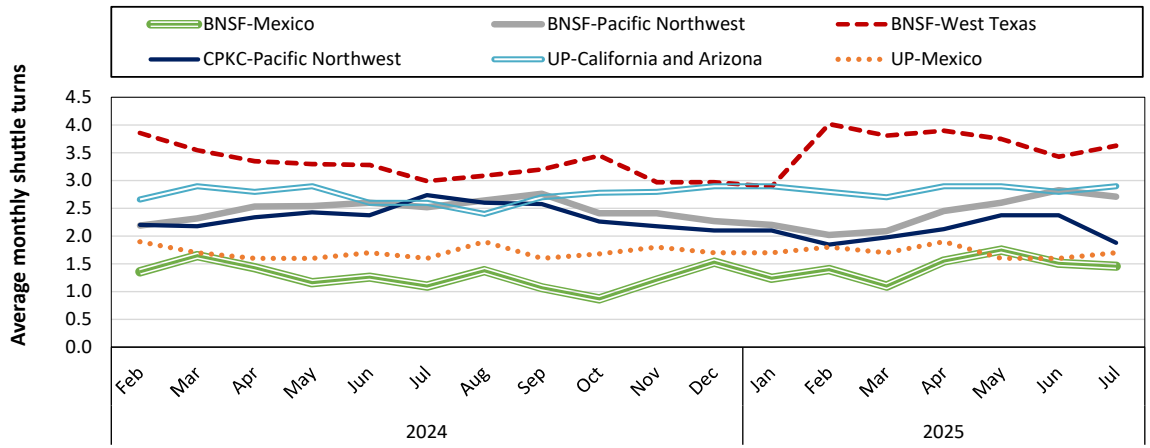
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 8/15/2025 (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

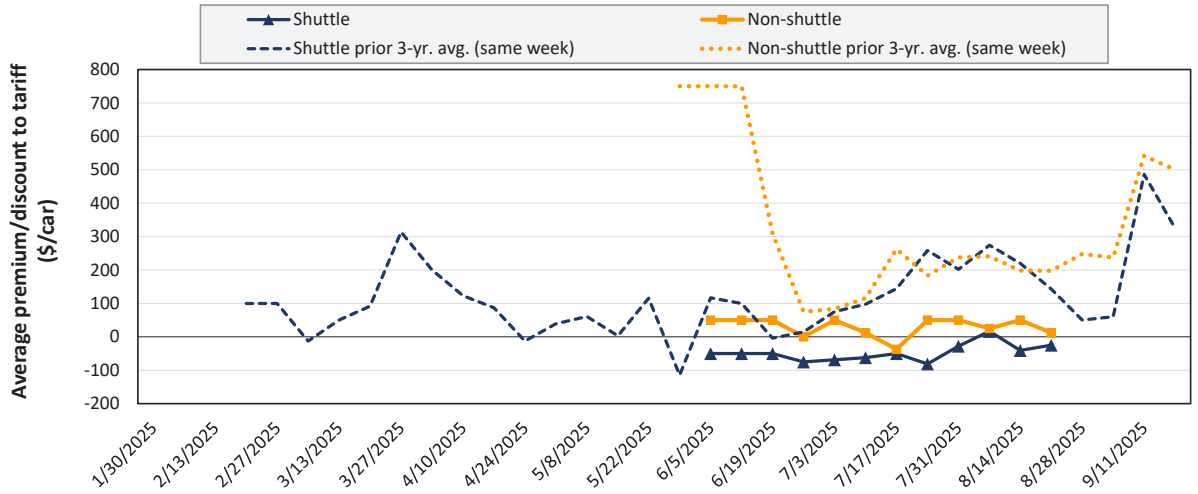


In July 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 1.9 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to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



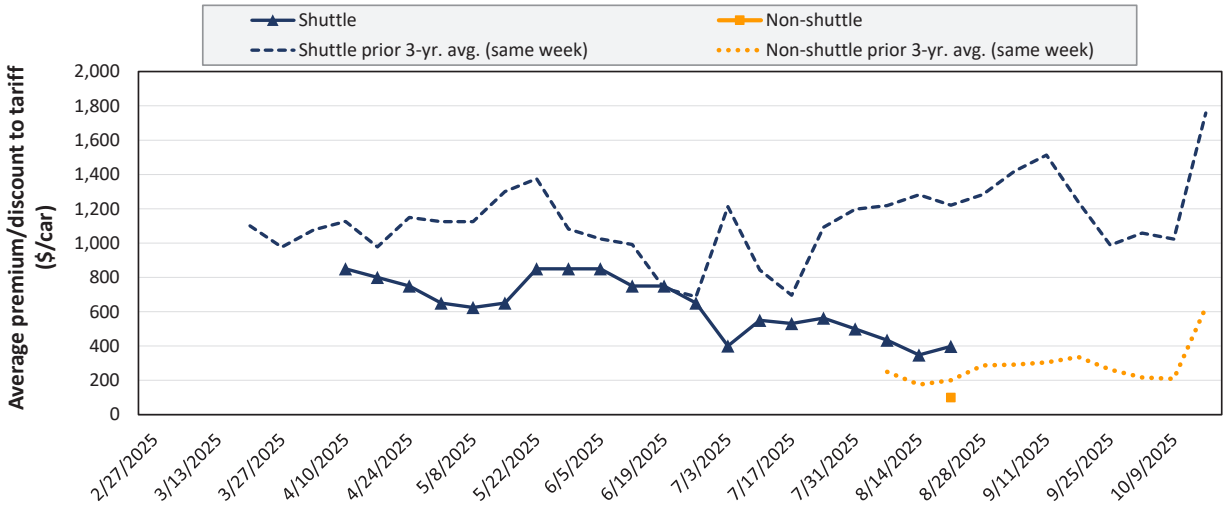
Average non-shuttle bids/offers fell $38 this week, and are $38 below the peak.

Average shuttle bids/offers rose $16 this week and are $42 below the peak.

8/21/2025	BNSF	UP
Non-Shuttle	$75	-$50
Shuttle	$37	-$88

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 October 2025



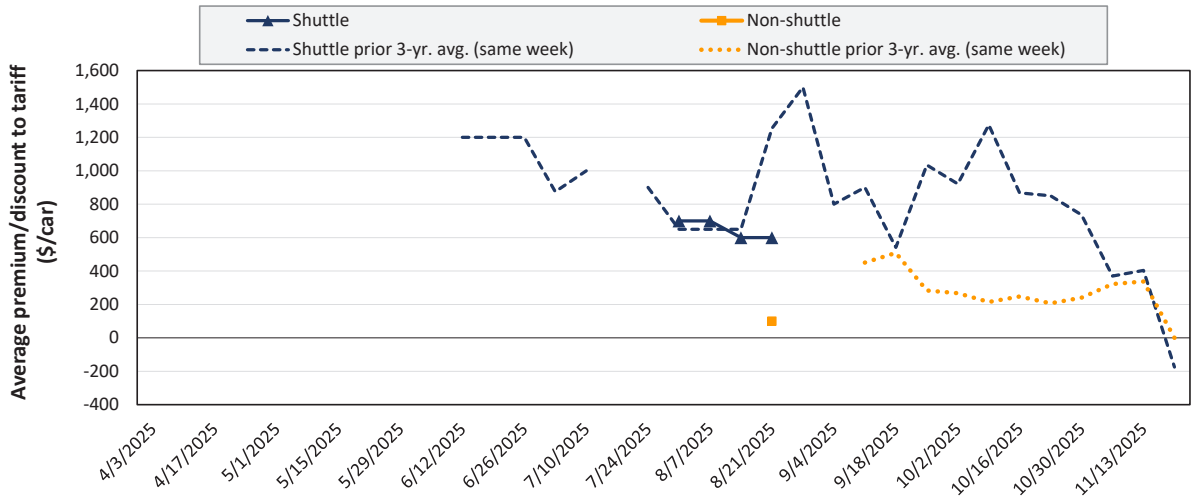
There were no non-shuttle bids/offers last week. Average non-shuttle bids/offers this week are at the peak.

Average shuttle bids/offers rose $50 this week and are $452 below the peak.

8/21/2025	BNSF	UP
Non-Shuttle	n/a	$100
Shuttle	$571	$225

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

Figure 8. Secondary market bids/offers for railcars to be delivered in November 2025



There were no non-shuttle bids/offers last week. Average non-shuttle bids/offers this week are at the peak.

Average shuttle bids/offers are unchanged this week and are $100 below the peak.

8/21/2025	BNSF	UP
Non-Shuttle	n/a	$100
Shuttle	$600	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.
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: 8/21/2025		Delivery period					
		Aug-25	Sep-25	Oct-25	Nov-25	Dec-25	Jan-26
Non-shuttle	BNSF	n/a	75	n/a	n/a	n/a	n/a
	Change from last week	n/a	-75	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-308	n/a	n/a	n/a	n/a
	UP	n/a	-50	100	100	100	n/a
	Change from last week	n/a	0	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-88	n/a	n/a	n/a	n/a
Shuttle	BNSF	-500	37	571	600	700	n/a
	Change from last week	-353	82	125	0	n/a	n/a
	Change from same week 2024	n/a	37	-254	100	n/a	n/a
	UP	-219	-88	225	n/a	n/a	n/a
	Change from last week	-125	-50	-25	n/a	n/a	n/a
	Change from same week 2024	-444	-88	-500	n/a	n/a	n/a
	CPKC	-100	75	200	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	-100	n/a	n/a	n/a	n/a	n/a

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

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

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

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

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

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, August 2025

Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	$5,800	$74.62	$5,874.62	$1.48	$58.34	4.4
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$117.88	$5,587.88	$1.41	$55.49	-4.0
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$124.32	$6,124.32	$1.54	$60.82	3.6
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$50.96	$5,090.96	$1.28	$50.56	5.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$123.13	$5,473.13	$1.38	$54.35	-4.2
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$65.45	$4,625.45	$1.17	$45.93	5.8
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$53.48	$4,853.48	$1.22	$48.20	5.7
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$65.59	$4,605.59	$1.16	$45.74	5.8
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$99.33	$5,529.33	$1.39	$54.91	-3.8
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$116.62	$5,546.62	$1.40	$55.08	-4.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.60	$23.58	8.8
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.69	$27.35	7.5
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,342	$44.40	$1,386.40	$0.35	$13.77	-0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,047	$509.36	$5,556.36	$1.40	$55.18	-3.0
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$490.14	$6,003.14	$1.51	$59.61	2.2
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$5,961	$0.00	$5,961.00	$1.50	$59.20	0.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,139	$0.00	$6,139.00	$1.55	$60.96	0.0
	CSX	Olney, IL	Fairmount, GA	Railroad	$4,706	$0.00	$4,706.00	$1.19	$46.73	0.0
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$207.30	$4,292.30	$1.08	$42.62	6.4
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$471.60	$6,476.60	$1.63	$64.32	3.7
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$521.10	$6,686.10	$1.69	$66.40	3.5
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$214.20	$5,219.20	$1.32	$51.83	5.2
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$352.80	$6,037.80	$1.52	$59.96	4.2
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$216.90	$4,441.90	$1.12	$44.11	6.2
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$106.96	$6,241.96	$1.69	$61.99	-3.5
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$6,685	$114.38	$6,799.38	$1.84	$67.52	-1.2
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$102.83	$6,187.83	$1.67	$61.45	-3.5
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$59.85	$3,459.85	$0.94	$34.36	-24.6
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$113.68	$6,298.68	$1.70	$62.55	-3.5
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$293.63	$2,374.63	$0.64	$23.58	9.1
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$293.63	$2,754.63	$0.74	$27.35	7.8
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,785	$509.36	$6,294.36	$1.70	$62.51	-2.7
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$389.31	$3,915.31	$1.06	$38.88	-0.5
	CSX	Casey, IL	Mobile, AL	Private	$3,646	$0.00	$3,646.00	$0.99	$36.21	3.7
	CSX	Marion, OH	Chesapeake, VA	Private	$3,214	$0.00	$3,214.00	$0.87	$31.92	2.6
	UP	Canton, KS	Houston, TX	Railroad	$5,150	$224.10	$5,374.10	$1.45	$53.37	5.0
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$468.60	$6,608.60	$1.79	$65.63	3.7
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$323.40	$5,833.40	$1.58	$57.93	4.4
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$369.30	$5,959.30	$1.61	$59.18	4.3

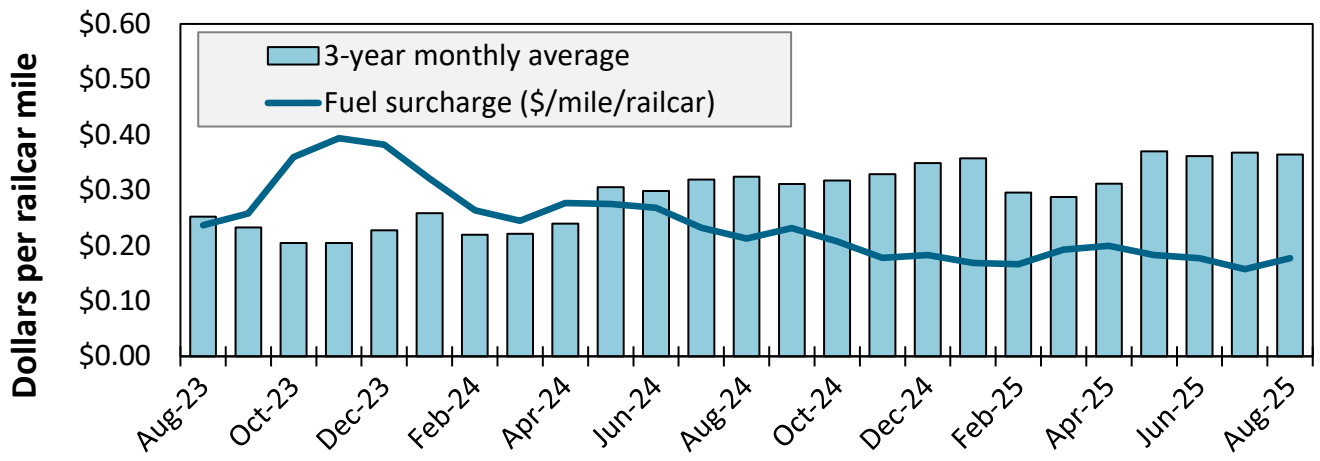
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage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

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

Commodity	US origin	US border city	US railroad	Train type	US rate plus fuel surcharge per car (USD)	US tariff rate + fuel surcharge per metric ton (USD)	US tariff rate + fuel surcharge per bushel (USD)	Percent M/M	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	$4,650	$45.77	$1.16	0.6	5.3
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,555	$54.67	$1.39	0.7	1.3
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$6,076	$59.80	$1.52	0.7	1.1
	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).

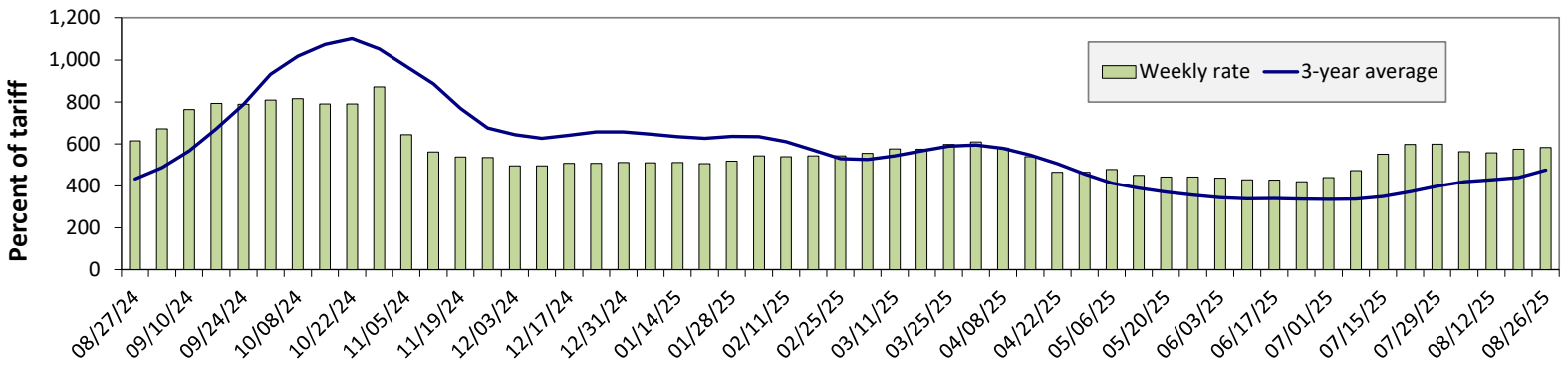
Figure 9. Railroad fuel surcharges, North American weighted average



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 26: 1 percent higher than the previous week; 5 percent lower than last year; and 23 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

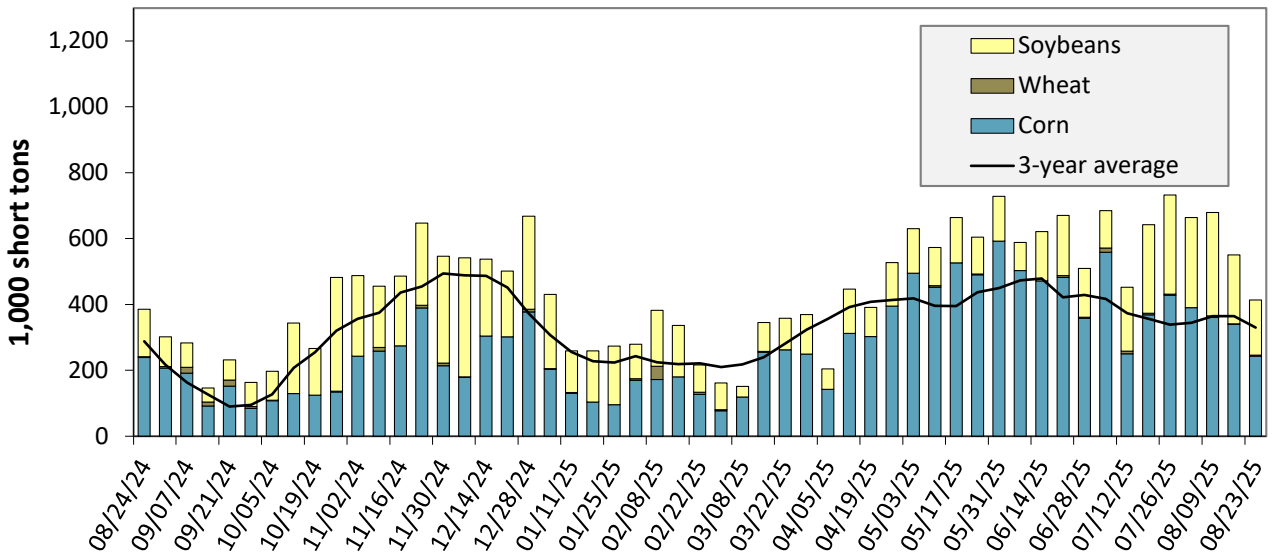
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	8/26/2025	606	599	583	467	506	475
	8/19/2025	609	592	576	464	483	471
$/ton	8/26/2025	37.51	31.87	27.05	18.63	23.73	14.92
	8/19/2025	37.70	31.49	26.73	18.51	22.65	14.79
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	-6	-7	-5	-24	-18	-35
	3-year avg.	9	20	23	9	8	3
Rate	September	755	731	709	686	709	700
	November	682	661	635	558	603	519

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 23: 7 percent higher than last year and 25 percent higher than the 3-year average.

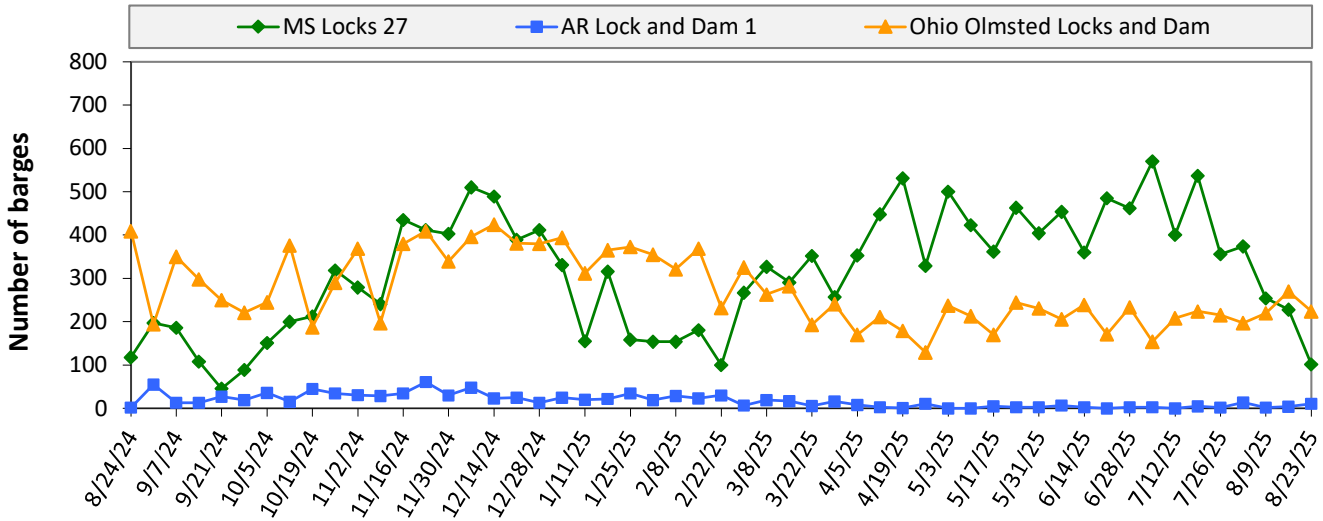
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/23/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	49	3	46	0	97
Mississippi River (Winfield, MO (L25))	163	3	123	0	290
Mississippi River (Alton, IL (L26))	236	3	167	0	407
Mississippi River (Granite City, IL (L27))	243	3	167	0	413
Illinois River (La Grange)	77	0	35	0	111
Ohio River (Olmsted)	15	23	11	4	53
Arkansas River (L1)	1	13	6	0	20
Weekly total - 2025	259	39	183	4	485
Weekly total - 2024	338	58	184	0	580
2025 YTD	13,621	897	7,363	130	22,011
2024 YTD	9,748	1,195	6,842	164	17,949
2025 as % of 2024 YTD	140	75	108	79	123
Last 4 weeks as % of 2024	89	89	135	54	103
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.

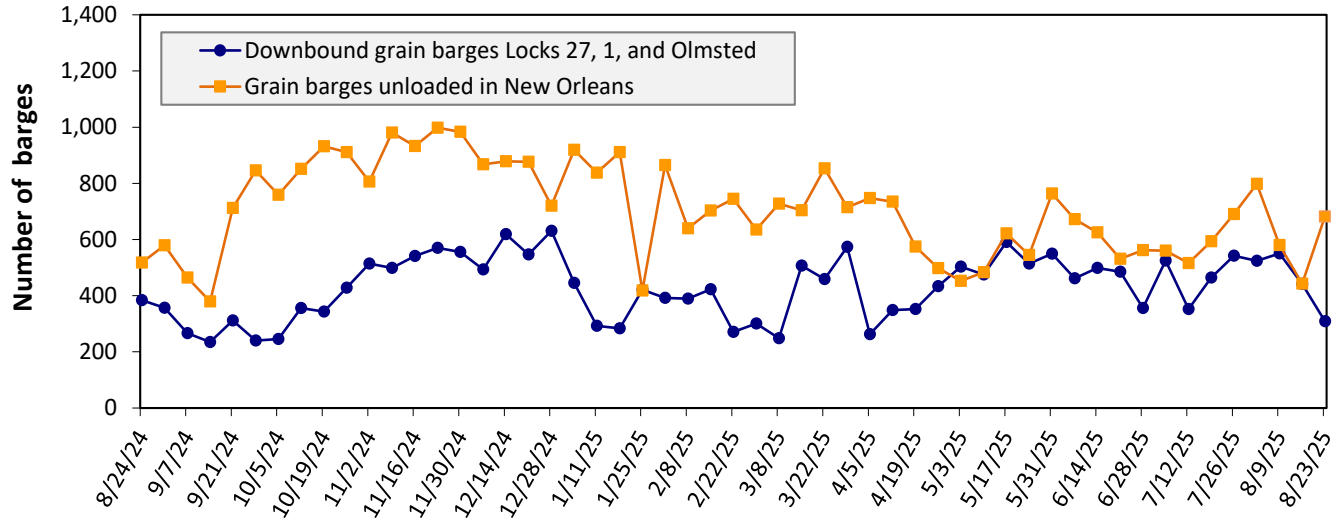
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 23: 337 barges transited the locks, 165 barges fewer than the previous week, and 18 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 23: 309 barges moved down river, 133 fewer than the previous week; 682 grain barges unloaded in the New Orleans Region, 54 percent more than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

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

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

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

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

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

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

Source: USDA, Agricultural Marketing Service.

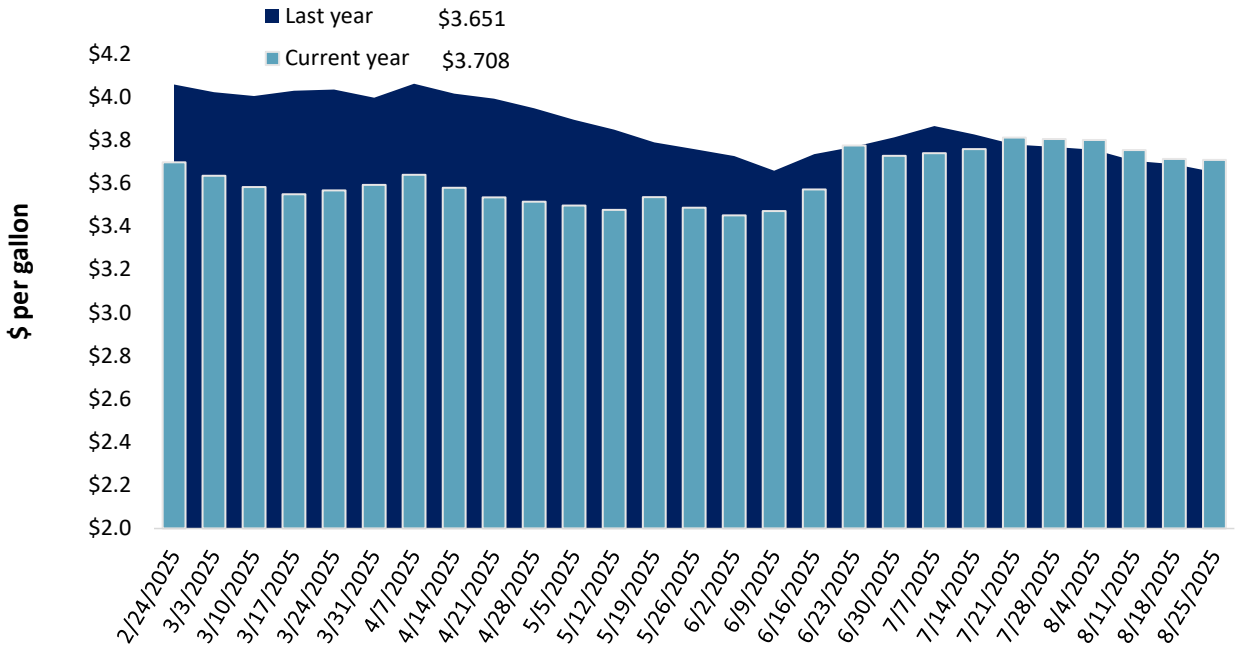
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 08/25/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.726	-0.007	0.001
	New England	3.968	-0.001	-0.001
	Central Atlantic	3.916	0.008	-0.004
	Lower Atlantic	3.631	-0.012	0.003
II	Midwest	3.698	-0.004	0.071
III	Gulf Coast	3.328	-0.012	0.011
IV	Rocky Mountain	3.748	-0.009	0.140
V	West Coast	4.461	0.006	0.189
	West Coast less California	4.103	0.009	0.210
	California	4.873	0.002	0.166
Total	United States	3.708	-0.005	0.057

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 25, the U.S. average diesel fuel price decreased 0.5 cents from the previous week to $3.708 per gallon, 5.7 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 8/14/2025	2,821	896	1,698	1,443	71	6,929	5,054	2,171	14,154
	This week year ago	1,127	916	1,791	1,136	64	5,034	4,036	2,414	11,484
	Last 4 wks. as % of same period 2023/24	223	103	97	117	120	131	172	127	145
Current shipped (cumulative) exports sales	2024/25 YTD	2,017	776	1,161	544	99	4,596	65,452	48,887	118,935
	2023/24 YTD	1,096	666	1,313	1,138	91	4,304	51,900	43,396	99,600
	YTD 2024/25 as % of 2023/24	184	116	88	48	109	107	126	113	119
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435

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

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

For the week ending 8/14/2025	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	5,753	23,180	22,478	3	17,746
Japan	2119	13,400	11,128	20	9,366
China	0	33	2,819	-99	8,233
Colombia	861	7,595	6,348	20	4,383
Korea	1138	6,224	2,477	151	1,565
Top 5 importers	9,870	50,431	45,249	11	41,293
Total U.S. corn export sales	16,685	70,506	55,936	26	51,170
% of YTD current month's export projection	23%	98%	98%	-	-
Change from prior week	2,860	-27	119	-	-
Top 5 importers' share of U.S. corn export sales	59%	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 8/14/2025	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	24,455	-8	28,636
Mexico	1,515	5,067	4,825	5	4,917
Japan	205	2,146	2,208	-3	2,231
Egypt	221	3,633	1,534	137	2,228
Indonesia	108	2,094	2,223	-6	1,910
Top 5 importers	2,049	35,419	35,246	0	39,922
Total U.S. soybean export sales	5,855	51,058	45,810	11	51,302
% of YTD current month's export projection	13%	100%	99%	-	-
Change from prior week	1143	-6	-44	-	-
Top 5 importers' share of U.S. soybean export sales	35%	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 8/14/2025	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	1,940	1,615	20	3,358
Philippines	1,148	1,194	-4	2,473
Japan	807	785	3	2,045
China	0	139	-100	1,137
Korea	855	851	1	1,674
Taiwan	399	450	-11	935
Thailand	299	296	1	667
Nigeria	611	198	208	629
Indonesia	498	366	36	518
Colombia	338	188	80	489
Top 10 importers	6,893	6,081	13	13,926
Total U.S. wheat export sales	11,525	9,339	23	19,135
% of YTD current month's export projection	48%	42%	-	-
Change from prior week	520	493	-	-
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.

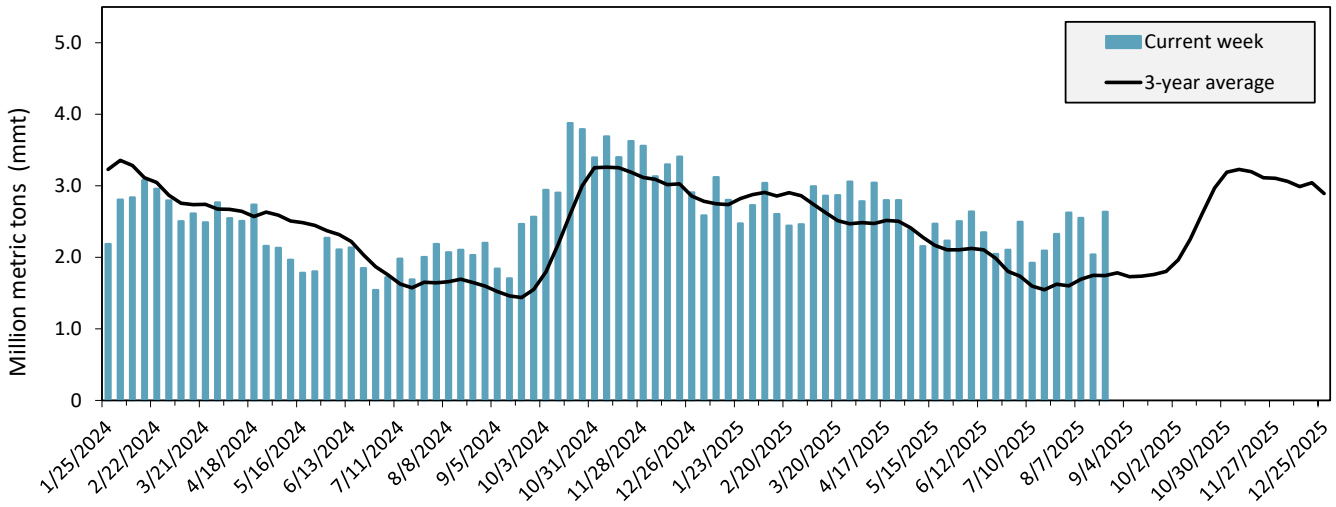
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 08/21/2025	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	257	248	104	15,696	11,579	136	177	344	13,987
	Soybeans	0	0	n/a	1,966	2,601	76	n/a	n/a	10,445
	Wheat	494	146	338	7,139	7,194	99	106	131	11,453
	All grain	751	394	191	24,916	22,460	111	129	172	37,186
Mississippi Gulf	Corn	614	384	160	23,672	17,287	137	95	129	27,407
	Soybeans	244	347	70	12,627	12,905	98	163	111	29,741
	Wheat	138	57	243	2,630	3,345	79	126	104	4,523
	All grain	996	788	126	38,970	33,598	116	115	119	61,789
Texas Gulf	Corn	21	46	46	330	358	92	206	175	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	227	105	217	2,990	1,152	259	231	341	1,940
	All grain	248	235	106	3,841	4,001	96	120	157	6,965
Interior	Corn	414	344	120	9,384	8,965	105	128	188	13,463
	Soybeans	136	150	91	4,418	4,641	95	110	138	8,059
	Wheat	85	81	105	2,053	1,946	106	126	127	2,989
	All grain	636	575	111	16,183	15,698	103	122	161	24,791
Great Lakes	Corn	0	0	n/a	64	0	n/a	n/a	966	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	0	10	0	165	292	56	36	75	653
	All grain	0	10	0	229	310	74	68	129	1,060
Atlantic	Corn	0	30	0	242	213	114	520	555	410
	Soybeans	2	6	32	492	440	112	-	141	1,272
	Wheat	2	2	71	52	62	82	21	28	73
	All grain	4	38	9	785	715	110	151	144	1,754
All Regions	Corn	1,305	1,052	124	49,388	38,403	129	120	173	56,109
	Soybeans	383	503	76	19,713	20,659	95	136	108	50,865
	Wheat	946	400	236	15,028	13,992	107	123	140	21,631
	All grain	2,635	2,040	129	85,027	76,836	111	120	141	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.

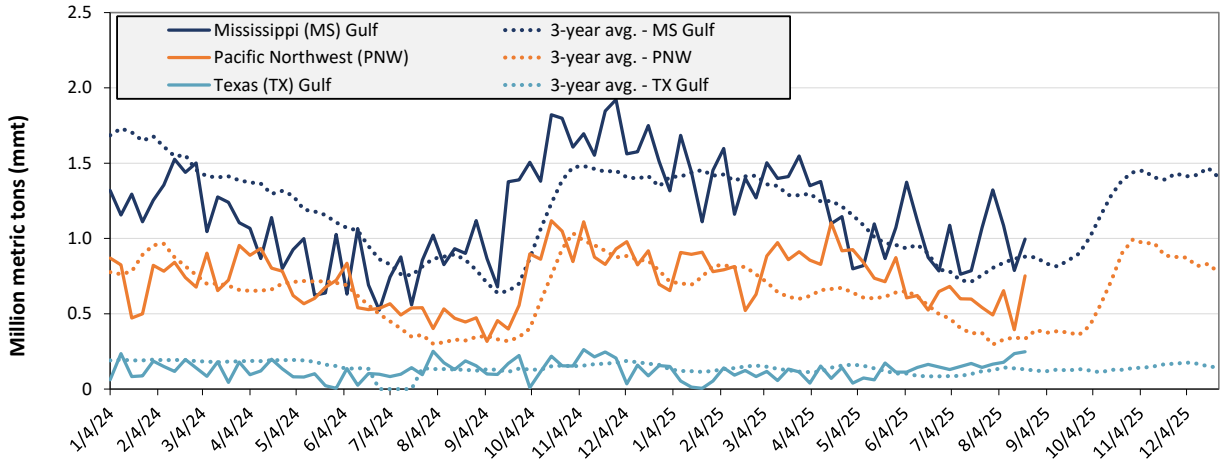
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 21: 2.6 mmt of grain inspected, up 29 percent from the previous week, up 47 percent from the same week last year, and up 51 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 08/21/25 inspections (mmt):
MS Gulf: 1
PNW: 0.75
TX Gulf: 0.25

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 26	up 6	up 22	up 91
Last year (same 7 days)	up 46	up 69	up 50	up 69
3-year average (4-week moving average)	up 13	up 89	up 23	up 125

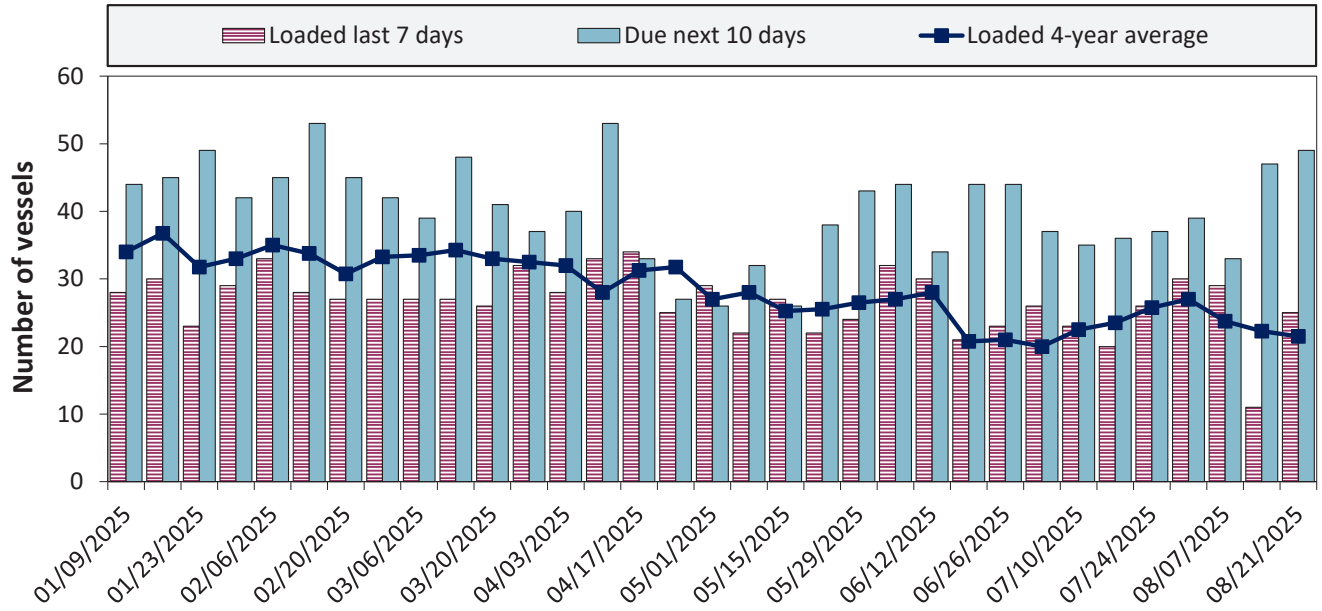
Source: USDA, Federal Grain Inspection Service.

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
8/21/2025	20	25	49	8
8/14/2025	26	11	47	10
2024 range	(11…45)	(18…38)	(29…61)	(3…25)
2024 average	28	28	45	13

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

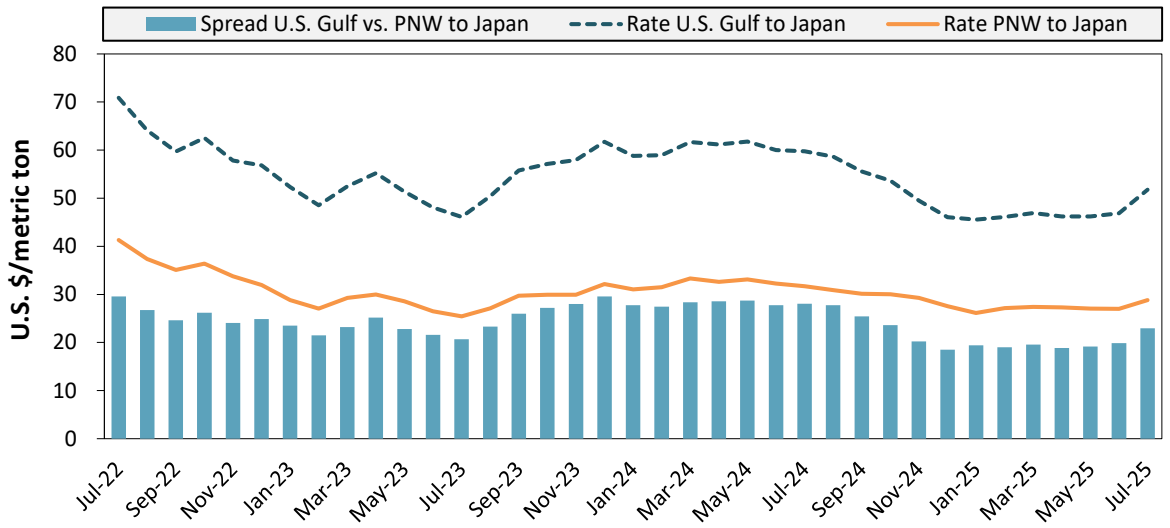
Figure 19. U.S. Gulf vessel loading activity



Week ending 08/21/25, number of vessels	Loaded	Due
Change from last year	25%	11%
Change from 4-year average	16%	38%

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.

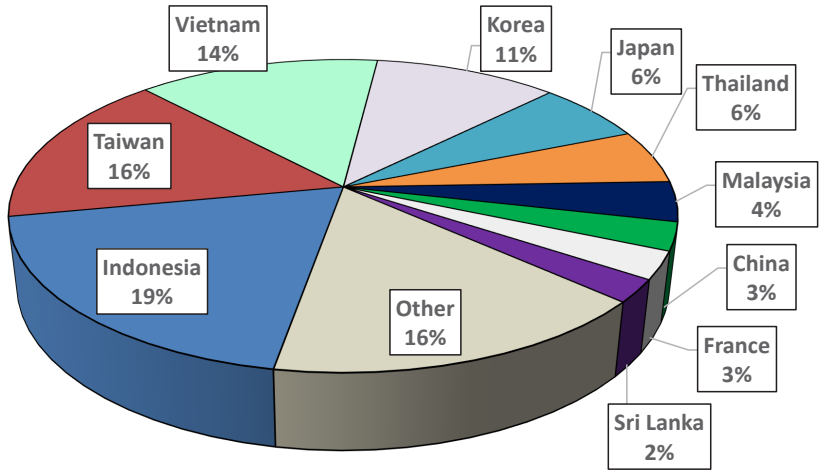
Table 20. Ocean freight rates for selected shipments, week ending 8/23/2025

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.

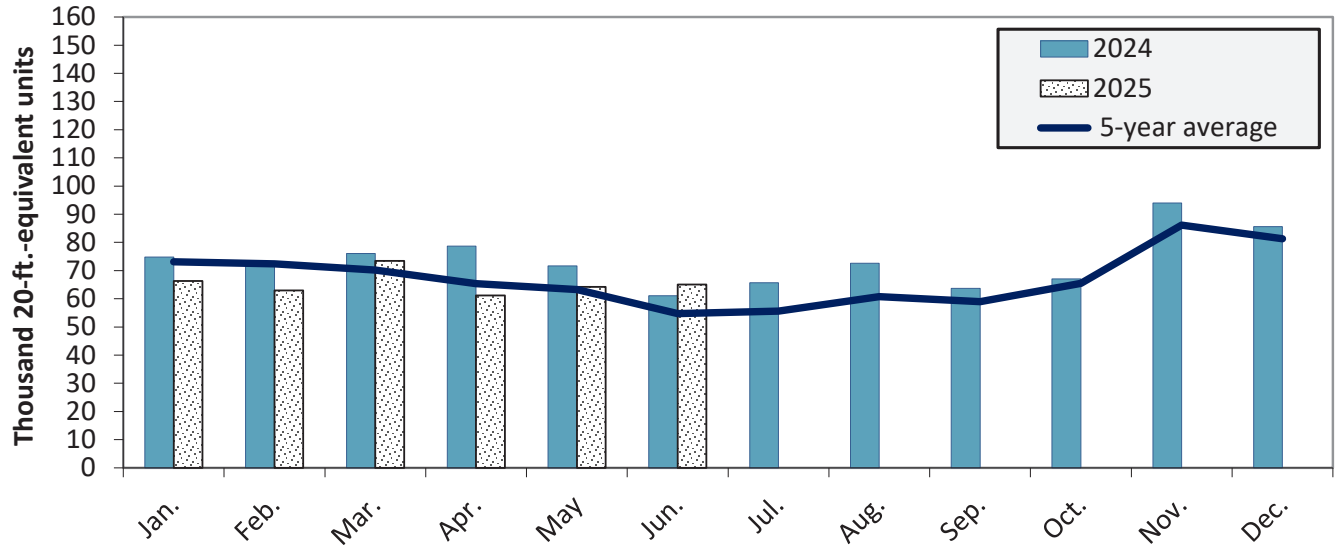
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined 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 28, 2025.
Web: **http://dx.doi.org/10.9752/TS056.08-28-2025**

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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