



Grain Transportation Report

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September 3, 2026

A weekly publication of the Agricultural Marketing Service

www.ams.usda.gov/GTR

Railroads Adjust Soybean Rail Tariff Rates for MY 2026/27.

On September 1, BNSF Railway (BNSF), Union Pacific Railroad (UP), and Canadian National Railway (CN) adjusted their soybean rail tariff rates for marketing year (MY) 2026/27. These changes are now reflected in [Grain Transportation Report \(GTR\) table 7](#) and [GTR table 8](#).

BNSF raised its tariff rates to Pacific Northwest (PNW) export terminals by \$120 per car. For the second year in a row, BNSF will substantially reduce most of its soybean tariff rates to the U.S.-Mexico border. In contrast to last year's significant cuts, UP raised its soybean tariff rates by \$225 per car, across all origins ([GTR, August 20, 2026](#)).

From elevators in the Corn Belt to Louisiana Gulf export terminals, CN raised its tariff rates for soybeans (and corn) by \$275 per car. The same rates will rise another \$330 per car—beginning in October and remain in effect until December 1. Starting in December, these CN rates will fall \$220 per car—where they will stay for the rest of the marketing year. Canadian Pacific Kansas City and CSX Transportation will update their corn and soybean tariff rates in October.

CHS and OCP Announce New Phosphate Fertilizer Plant in Louisiana.

Last week, CHS Inc. and OCP North America [announced](#) a joint venture to construct a new phosphate fertilizer facility in Waggaman, LA. The new plant is expected to

produce over 1 million metric tons (mmt) of phosphate fertilizer annually and would be the first phosphate fertilizer facility built in the United States in over 40 years.

According to CHS, the facility is sited in Waggaman—on the Mississippi River—for the location's [logistical advantages](#). Via ocean vessel, merchant-grade phosphoric acid will be imported from OCP in Morocco. The facility also has access to U.S.-sourced ammonia (which is produced in Waggaman) and U.S.-sourced sulfur. Finished phosphate fertilizer products can be transported to the Corn Belt via barge transportation on the Mississippi River.

For more information on fertilizer supply chain and transportation, see the [Fertilizer Transportation Dashboard](#) on AgTransport.

Bartlett Opens New Grain Elevator To Support Corn Exports to Mexico.

Bartlett Grain Co. recently [opened](#) a new shuttle-loading grain elevator near Sheffield, IL. Located on a Union Pacific Railroad line, the 2.4-million-bushel facility will draw corn shipments from a 100-mile radius—competing with other shuttle-loading elevators, barge-loading elevators, and processors.

The new facility is expected to supply corn exports to Mexico, of which Bartlett is a leading exporter. In 2013, Bartlett opened a grain elevator in [Jacksonville, IL](#)—on a Kansas City Southern Railway line—likewise, to source corn for export to Mexico.

The new elevator arrives amid strong demand for corn exports to Mexico. From September 2025 to June 2026 (the first 10 months of marketing year 2025/26), rail exports of corn to Mexico totaled 13.9 mmt—32 percent above the prior 5-year average.

FMCSA Proposes Codifying English Requirements for Truckers.

On August 10, the Federal Motor Carrier Safety Administration (FMCSA) published a [notice of proposed rulemaking](#) (NPRM) to codify English proficiency requirements for commercial drivers. Officials say reinstating strict checks has already removed thousands of unsafe drivers from the road, and the NPRM aims to prevent future loosening of standards.

The proposed rule would take the following actions: classify an inability to understand road signs or communicate with law enforcement as grounds for immediate out-of-service orders; ensure that all States uniformly enforce English-proficiency standards; and close a safety loophole by stopping non-English-proficient drivers before they travel beyond the U.S.-Mexico border area. Comments can be submitted until October 9, 2026.

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 27, [unshipped balances](#) of corn and soybeans totaled 2.97 million metric tons (mmt), down 49 percent from last week and unchanged from the same time last year. The unshipped balance of wheat for MY 2026/27 was 3.67 mmt, down 4 percent from last week and down 38 percent from the same time last year.

Net [corn export sales](#) for MY 2025/26 were -0.83 mmt, down significantly last week. Net [soybean export sales](#) were -0.09 mmt, down significantly from last week. Net [wheat export sales](#) for marketing year 2026/27 were 0.31 mmt, down 22 percent from last week.

Rail

U.S. Class I railroads originated 27,829 [grain carloads](#) during the week ending August 22. This was a 5-percent increase from the previous week, 12 percent more than last year, and 26 percent more than the 3-year average.

Average September [shuttle secondary railcar bids/offers](#) (per car) were \$638 above tariff for the week ending August 27. This was \$238 more than last week and \$792 more than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$13 above tariff. This was \$16 less than last week and \$29 more than this week last year.

Barge

For the week ending August 29, [barged grain movements](#) totaled 540,154 tons. This was 14 percent more than the previous week and 41 percent more than the same week last year.

For the week ending August 29, 346 [barges moved down river](#), 27 more than the previous week. There were 468 grain barges unloaded in the New Orleans region, 15 percent fewer than the previous week.

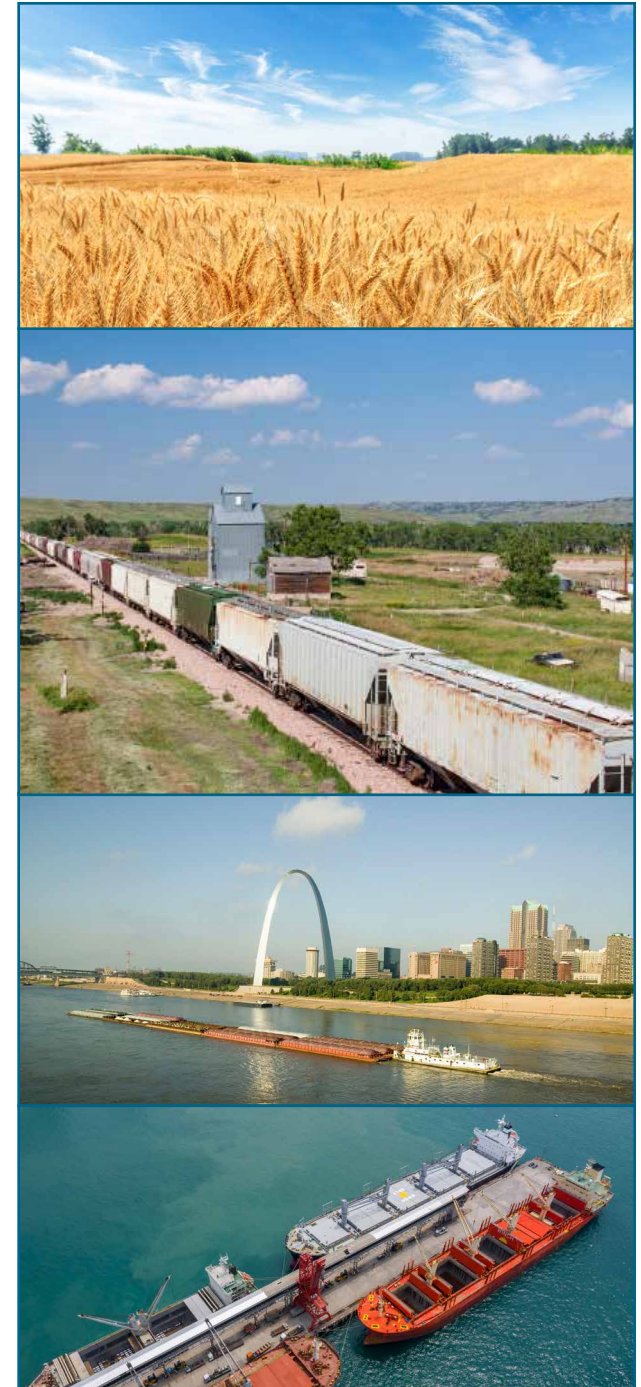
Ocean

For the week ending August 27, 18 [oceangoing grain vessels](#) were loaded in the Gulf—47 percent fewer than the same period last year. Within the next 10 days (starting August 28), 29 vessels were expected to be loaded—36 percent fewer than the same period last year.

As of August 27, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$74.50, up 2 percent from the previous week. The rate from the Pacific Northwest to Japan was \$37.00 per mt, up 1 percent from the previous week.

Fuel

For the week ending August 31, the [U.S. average diesel fuel price](#) decreased 5.3 cents from the previous week to \$5.599 per gallon, 186.5 cents above the same week last year.



At 2026 NGCC, Railroads Detail Readiness for Big Harvest

On August 25, the Surface Transportation Board (STB) convened the 33rd annual [National Grain Car Council](#) (NGCC) meeting in Kansas City, MO. The meeting serves as a collaborative forum for railroads, grain shippers, private car lessors, and regulators to discuss issues relevant to grain transportation, including railroads' preparedness to handle the fall harvest.¹

The demand for grain transportation will likely be strong during this year's harvest. Corn was projected at 16.0 billion bushels (bbu) in USDA/National Agricultural Statistics Service's August [Crop Production report](#)—smaller than last year but still among the largest crops on record. Soybeans are projected at a record 4.5 bbu, with projected exports up 140 million bushels. At this time last year, no sales had been booked to China for the next marketing year; this year, as of August 20, 6.8 million metric tons (mmt) have been booked. Combined with continued crush expansion, USDA projects record demand.

This article highlights topics covered in the NGCC meeting, including the railroads' assets (e.g., locomotives, cars, and crew) that are ready for harvest; shifts in the composition of rail shipments (because of more soybean meal production); and challenges (to short line railroads) posed by an aging legacy fleet.² Overall, although both shippers and railroads cited some recent service issues amid extreme weather events and record grain carloads,

neither group expressed particularly strong concerns about service in the upcoming harvest.

Looking Ahead to Harvest: Railroad Capacity and Readiness

In the West. BNSF reported a total covered hopper fleet of 31,000 cars (down 3 percent [from last year](#)). Of that total, 29,200 cars are active and 1,800 are in storage. Of those in storage, 600 are grain hoppers, all planned for harvest service. The program includes 140 shuttles; 30 regular Domestic Efficiency Trains (DETs); and an expanded fleet of 30 direct DETs (up from 20 sets last year). BNSF cited a system locomotive count of 4,792 (down 6 percent from last year), all of which are expected to operate during peak harvest. The railroad maintains a train, yard, and engine workforce of approximately 14,800, with 225 of 800 planned additions for 2026 remaining for the fourth quarter.

BNSF continues to reallocate crews across the North region, primarily along the Northern Transcon grain corridor. The railroad reported \$3.6 billion invested in capital projects this year, bringing its 10-year capital investment above \$35 billion. Work includes installing 2.5 million ties, laying 900 miles of new rail; surfacing 2,000 miles of track; and completing bridge work on BNSF's Fallbridge Subdivision, which parallels the Columbia River into Portland, OR.

According to BNSF, its past due orders (measured as 4 days past the want date) have averaged 460 over the prior 28 days, and the firm is current on all DET fulfillment. BNSF expects past due orders to normalize without impacting harvest. The firm further anticipates overall network velocity will improve as summer track maintenance programs conclude.

UP reported a fleet of 3,950 operable high-horsepower locomotives (around 1,200 of which are in storage)—up 50 from [last year](#)—alongside a fleet of more than 17,000 covered hoppers. UP grain shuttle velocity averaged 315 miles per day over the past 3 months, consistent with the same period last year, and UP's shuttle fleet has averaged more than 300 miles per day annually for over 3 years—a level unmatched in the firm's recorded history. For manifest traffic, UP's service performance index stood at 95 percent, putting network trip compliance near 3-year highs. Over the past month, UP has been pre-positioning crews to support anticipated demand in the PNW corridor.

In the East. CSX expects higher rail grain demand than last year—the reverse of the 2025 picture—because drought has sharply reduced Southeastern corn production. North and South Carolina corn production is forecast down significantly from last year's near-record harvest. The Carolinas import roughly 40 percent of corn shipped by CSX. With eastern

1 NGCC is an advisory body founded by the Interstate Commerce Commission (STB's predecessor agency) in 1994.

2 The proposed merger between Union Pacific Railroad and Norfolk Southern Railway was not discussed at the meeting, because STB members cannot comment on pending matters.

Corn Belt corn and soybean production both up from last year, CSX expects feeders, crushers, and exporters in the Southeast to lean heavily on inbound rail.

CSX reported a fleet of 3,200 system grain cars (2,900 in active service and more than 300 ready in storage), down 6 percent from [last year](#). The railroad again has 28 system 90-car sets in constant rotation, and plans to have 50 unit grain trains at peak harvest. Active train and engine (T&E) employees number 7,100 to 7,200—down slightly from 2025, but 400 to 500 above 2022-24 levels.

CSX noted sluggish service in the first half of 2026 improved after the July 4 holiday and has remained fairly stable, apart from a temporary disruption from Midwest storms during the week of August 10. Over the last 8 weeks, system velocity averaged 23.3 miles per hour (mph) (down 4 percent from the same 2025 period)—with grain train velocity just under 22 mph (down 2 percent from the same 2025 period). Asked whether crew constraints would affect grain corridors, CSX clarified that crew issues are largely confined to New York and mainly affect manifest service rather than bulk grain operations.

NS reported a locomotive fleet of 3,276 units (up 1 percent from [last year](#)). Of that total, 75 percent are currently active, and 40 newly purchased units will be integrated by November 1. NS said its grain hopper fleet consists of more than 3,500 cars, with 89 percent in active circulation. To support network operations, NS maintains a T&E

workforce of 7,833 employees, has hired more than 1,100 T&E employees in 2026, and currently has 650 trainees in the pipeline. NS noted that—although stronger demand and weather-related disruptions degraded second-quarter network fluidity—August terminal dwell and train speeds returned to 2025 levels.

Canada and Central United States. CN has added about 20 more high- and mid-horsepower locomotives, up from [last year's 1,950 count](#). The railroad also has 240 locomotives in storage (up 20 from last year)—most of which are in short-term storage (deployable with 1 to 4 weeks' notice). T&E counts in Iowa, Illinois, and Wisconsin are down about 50 net positions, while 183 employees remain furloughed across CN's southern region. CN's Champaign-to-Gulf T&E headcount (about 1,060 employees) is down 60 from last year, but 40 employees will be added ahead of peak harvest.

Over the past 30 days, CN has achieved a 94-95 percent fulfillment rate on its local scheduled service commitments for manifest traffic. CN emphasized that most bulk grain on its network moves in private, shipper-supplied cars and CN's 1,475-car U.S. system fleet (down 3 percent from last year) is staged for quick deployment.

CPKC reported a grain hopper fleet of 20,600 cars (close to [last year's](#)), including 18,200 (88 percent) modern high-capacity hoppers. For the fall peak, CPKC is targeting 1,970 to 1,990 available locomotives, including 100 new units purchased in 2025 and another 100 announced

in 2026. Of the latest order, 60 percent are in service, with the remainder expected to enter service this year. CPKC expects to operate 140 dedicated trains across the network (in line with last year's target). The railroad reported that—year to date—U.S. grain trains have been cycling an average of 2 turns per month to the PNW and 1.6 turns per month to Mexico. According to STB service data ([available on AgTransport](#)), CPKC July grain shuttle turns were up 5 percent from 2025 ([GTR fig. 5](#)). CPKC's U.S. T&E staff stood at 2,466 as of July, similar to last year.

Mexico. Although not subject to U.S. economic regulation, the Mexican railway company Ferromex (FXE) joined STB's Class I panel for the second consecutive year. FXE reported nearly 800 active locomotives, down from 812 [last year](#). FXE also has more grain cars in service (4,912 this year, vs. 3,842 last year) and ready to pull out of storage (973 this year, vs. 770 last year). About two-thirds of FXE's grain fleet is manifest service, and one-third is unit train service.

The railroad ran 121 unit and shuttle trains in interchange with UP and BNSF in July and expects to operate approximately 130 unit and shuttle trains for harvest. FXE reported an on-time departure rate of 89 percent, up 2 percentage points from [last year](#). The railroad said its primary operational challenge involves delays in receiving grain trains from the United States into Mexico because of dirty cars and soil contamination.

Structural Changes Beyond the Harvest: Crush Expansion and an Aging Car Fleet

Soybean Crush. As a USDA/Agricultural Marketing Service representative discussed at NGCC, the ongoing soybean crush build-out is redirecting where and how much grain moves across domestic rail networks. During the first 10 months of marketing year 2025/26, soybean exports were 25 percent below the 5-year average, while corn exports were 39 percent above average. Conversely, domestic soybean crush volume ran 18 percent above average, supported by near-record crush margins and sustained high demand due to Federal renewable fuel targets. Originated grain mill carloads (which include soybean meal) increased 12 percent from last year, with July 2026 setting a monthly record in STB data at 61,752 carloads.

Industry developments illustrate how this expansion is reshaping rail demand. Ag Processing Inc. (AGP) recently dispatched its [first unit train of soybean oil](#) from a newly opened facility and inaugurated an [export terminal](#) at the Port of Grays Harbor, WA, designed to double the company's soybean meal export capacity. Shipper representatives noted that because domestic meal demand grows only 2-3 percent annually, surplus meal requires dedicated rail service to export gateways in the PNW and the Gulf.

Furthermore, expanded soybean processing plants in the Western Corn Belt and Northern Plains now create steady, year-round domestic demand. This shift toward a greater share of

soybean-product carloads (relative to soybean carloads) flattens the traditional surge in grain carloads during the fall harvest and changes how railroads and shippers deploy their equipment between bulk grain and processed products.

Aging Covered Hopper Fleet. One STB member highlighted an impending fleet replacement cycle, noting that—of the roughly 200,000 covered hoppers in the 4,750- to 5,400-cubic-foot range that serve grain and other bulk commodities—about 70,000 are 4,750-cubic-foot cars with an average age exceeding 40 years. Because a freight car generally can no longer be interchanged with other railroads past 50 years old, a substantial share of the legacy fleet will retire within the next several years.

Railcar lessor representatives reported that North American railcar manufacturing remains subdued, with projected 2026 builds (24,000 cars across all car types) trailing annual attrition and falling well below the 10-year historical average of 49,000 cars. However, Class I railroads reported minimal direct exposure to near-term 4,750-cubic-foot retirements. Major carriers explained that legacy cars represent a negligible share of their active grain fleets, and several Class Is have already transitioned to modern, high-capacity 286,000-pound equipment or rely heavily on customer-supplied private cars.

In contrast, replacing aging equipment presents a capital hurdle for short line operators. Watco, which operates dozens of short line railroads across North America,

reported that 65 percent of its roughly 2,000 grain cars will reach end-of-life status by 2032. Short line representatives emphasized that smaller railroads operate in a capital-intensive environment with lower revenue margins. As a result, to replace aging rolling stock and upgrade legacy track infrastructure, short line railroads require collaborative financing, including public infrastructure grants and capital investments with shippers.

Conclusion: Harvest Execution Relies on Transparent Communication

While Class I railroads reported adequate locomotive, car, and crew resources entering the 2026 harvest, operational performance will depend on maintaining network fluidity and forward alignment. STB members, grain shippers, railroads, and equipment lessors underscored that effective communication is critical as the season unfolds. By sharing timely information about crop progress, demand shifts, and any operational hiccups (from weather disruptions to labor constraints), market participants can adjust loading schedules, manage facility capacity, and ensure rail assets turn efficiently across domestic and export corridors.

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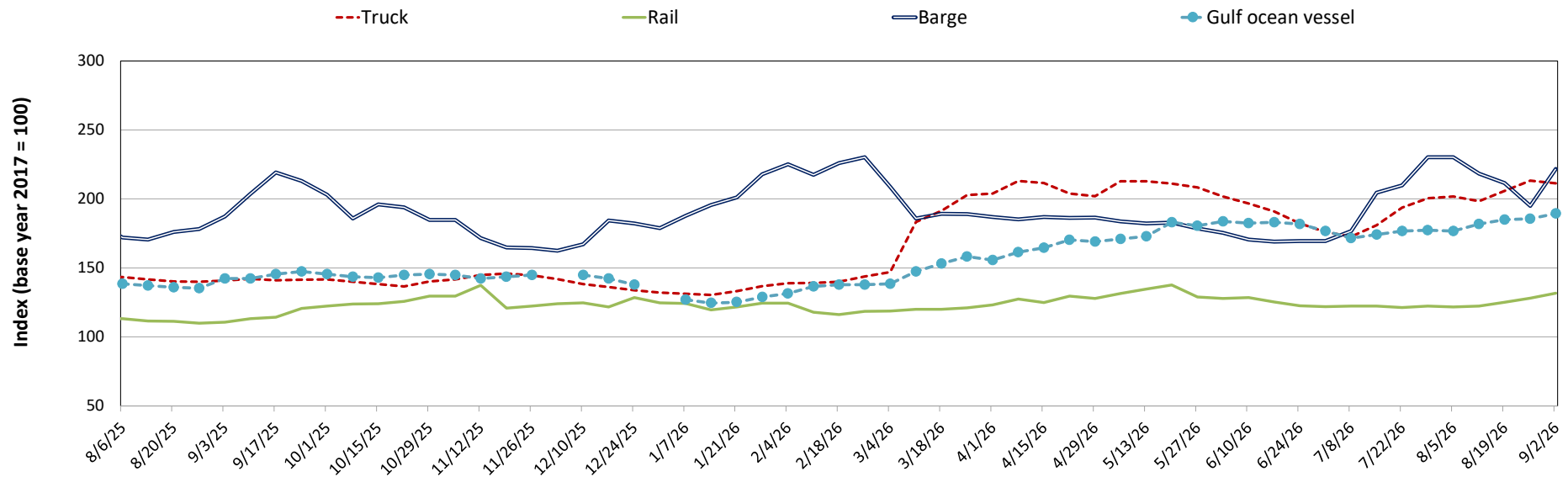
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
09/02/26	211	132	222	189	176
08/26/26	213	128	195	186	175
09/03/25	141	111	187	142	139

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.

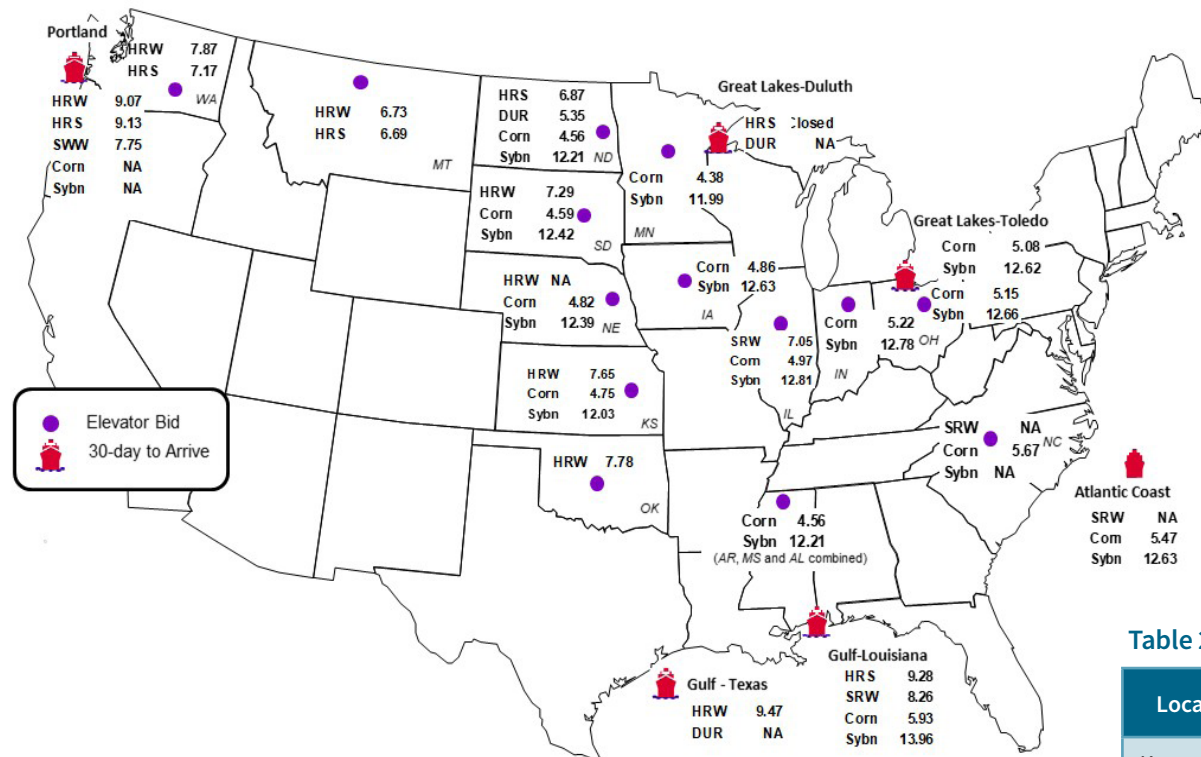
Figure 1. Grain transportation cost indicators as of week ending 09/02/26



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

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



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
 Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
 Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.
 Sources: For U.S. inland data: GeoGrain, and USDA, Agricultural Marketing Service (AMS), *Market News Report*. For corn & soybean export bids: USDA, AMS, *Export Grain Bids Report*. For wheat bids: U.S. Wheat Associates, *Weekly Wheat Report*.

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

Commodity	Origin-destination	8/28/2026	8/21/2026
Corn	IL-Gulf	-0.96	-1.04
Corn	NE-Gulf	-1.11	-1.25
Soybean	IA-Gulf	-1.33	-1.33
HRW	KS-Gulf	-1.82	-2.22
HRS	ND-Portland	-2.26	-2.43

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	08/28/2026	Week ago 08/21/2026	Year ago 08/29/2025
Kansas City	Wht	Dec	8.012	7.726	5.196
Minneapolis	Wht	Dec	7.693	7.245	5.800
Chicago	Wht	Dec	7.838	6.994	5.342
Chicago	Corn	Dec	5.364	5.084	4.202
Chicago	Sybn	Dec	12.878	12.394	10.544

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

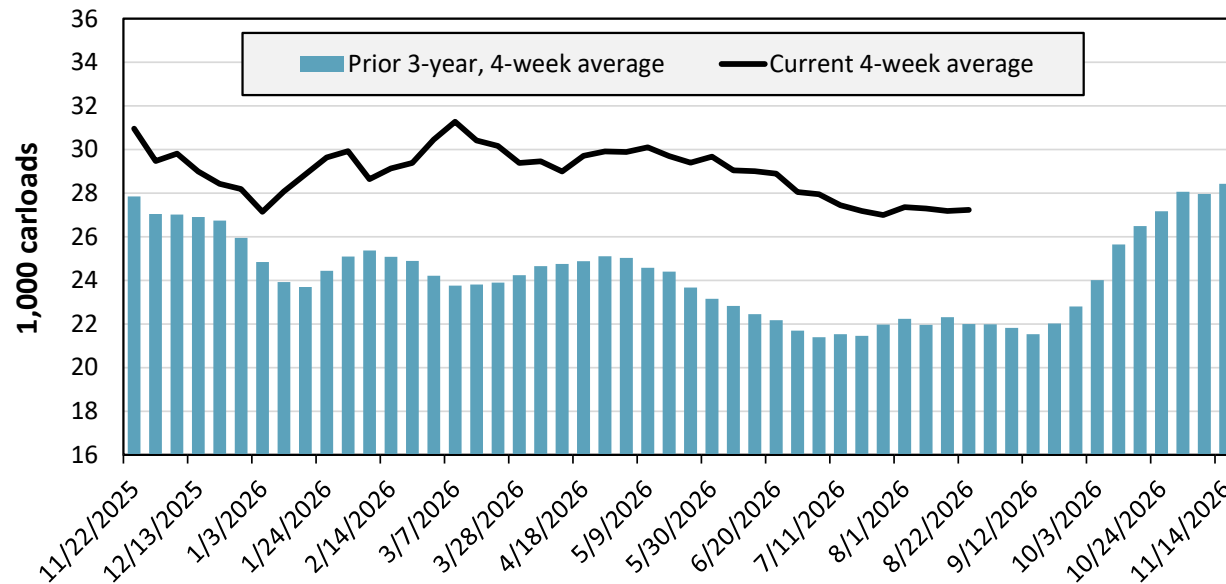
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 8/22/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,161	2,639	12,748	5,712	3,884	1,685	27,829
This week last year	951	2,169	10,856	6,413	3,244	1,313	24,946
2026 YTD	49,937	85,806	424,305	221,564	118,751	56,744	957,107
2025 YTD	52,863	94,147	373,740	195,670	93,944	47,669	858,033
2026 YTD as % of 2025 YTD	94	91	114	113	126	119	112
Last 4 weeks as % of 2025	128	109	108	100	109	119	108
Last 4 weeks as % of 3-yr. avg.	114	104	130	112	132	160	124
Total 2025	81,717	140,116	608,958	313,968	157,757	79,502	1,382,018

Note: The last 4-week percentages compare the most recent 4 weeks of data to the analogous 4 weeks from the prior year and to the analogous 4 weeks in the prior 3 years. CSX = CSX Transportation; NS = Norfolk Southern; BNSF = BNSF; Railway UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City; YTD = year-to-date; avg. = average; yr. = year. CPKC and CN report carloads for their U.S.-operations only, so the U.S. total reflects originated carloads for all six Class I railroads.

Source: Surface Transportation Board.

Figure 3. Total weekly U.S. Class I railroad grain carloads



For the 4 weeks ending August 22, grain carloads were unchanged from the previous week, up 8 percent from last year, and up 24 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: 8/21/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	37.6	27.2	30.4	26.4	17.5	25.5	27.4
	Average over last 4 weeks	29.0	32.5	30.9	22.4	11.1	25.4	25.2
	Average of same 4 weeks last year	22.9	23.4	13.2	14.2	6.8	42.4	20.5
Average grain unit train speeds (miles per hour)	This week	21.7	17.7	23.9	22.6	22.1	17.9	21.0
	Average over last 4 weeks	21.9	18.8	23.6	22.6	23.0	17.5	21.2
	Average of same 4 weeks last year	22.6	19.5	23.8	22.5	23.9	14.7	21.2

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

These service metrics are published weekly on the [Surface Transportation Board's website](#) and on [AgTransport](#). For more information on each service metric, see [49 CFR § 1250.2](#).

Source: Surface Transportation Board.

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

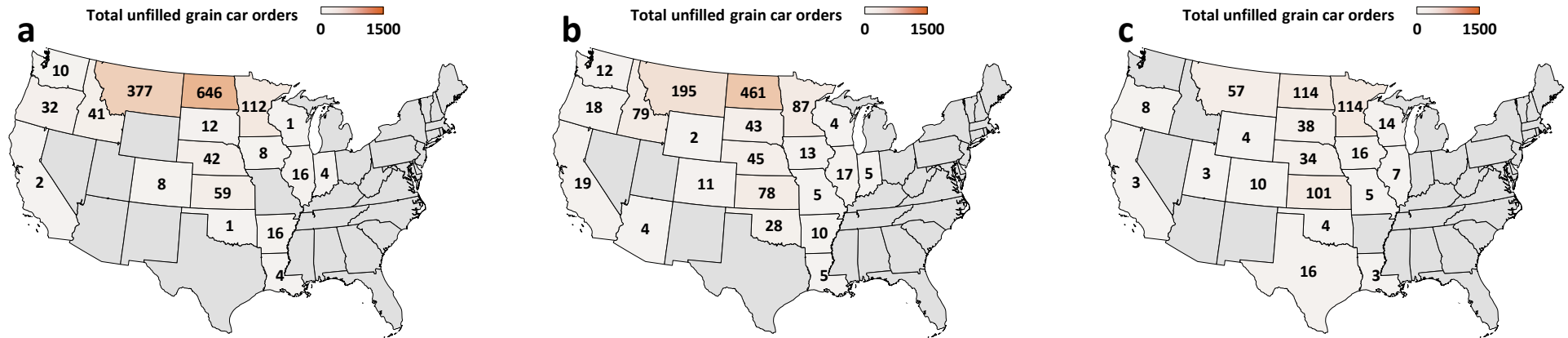
For the week ending: 8/21/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	78	22	333	50	18	142	643
	Average over last 4 weeks	47	17	341	57	10	180	651
	Average of same 4 weeks last year	14	6	223	67	9	395	713
Average number of loaded grain cars not moved in over 48 hours	This week	89	365	973	64	24	270	1,785
	Average over last 4 weeks	61	248	854	52	14	371	1,600
	Average of same 4 weeks last year	17	139	276	72	10	914	1,428
Average number of grain unit trains held	This week	0	0	3	5	1	6	15
	Average over last 4 weeks	0	0	5	4	1	8	17
	Average of same 4 weeks last year	0	1	3	4	0	8	16
Total unfilled manifest grain car orders	This week	8	0	826	126	0	431	1,391
	Average over last 4 weeks	6	0	557	279	0	297	1,139
	Average of same 4 weeks last year	0	2	196	189	0	228	615

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

These service metrics are published weekly on the [Surface Transportation Board's website](#) and on [AgTransport](#). For more information on each service metric, see [49 CFR § 1250.2](#).

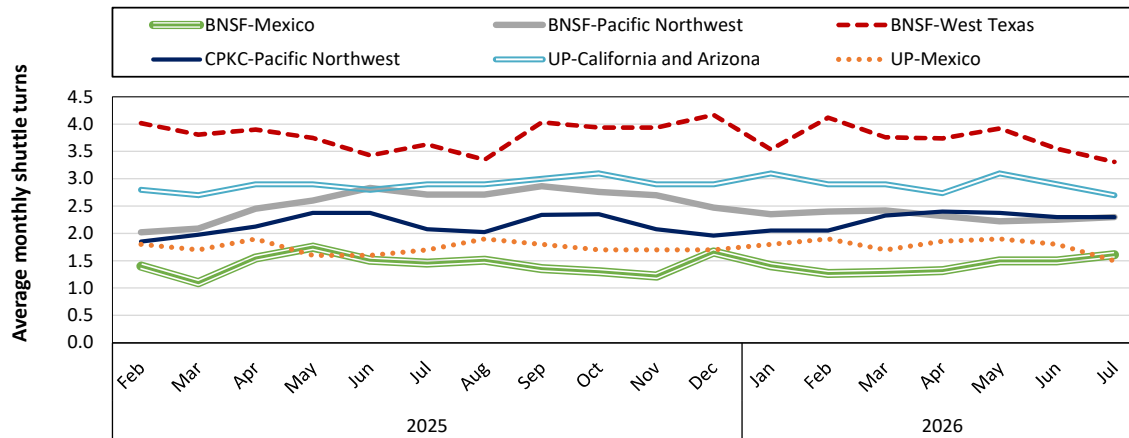
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 8/21/2026 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



Note: Unfilled grain car orders for Kansas City Southern Railway (now part of Canadian Pacific Kansas City) are not included because those metrics are not reported at the State level.
Source: Surface Transportation Board. Map credits: Bing, GeoNames, Microsoft, TomTom.

Figure 5. Average monthly turns for grain shuttle trains, by railroad and region

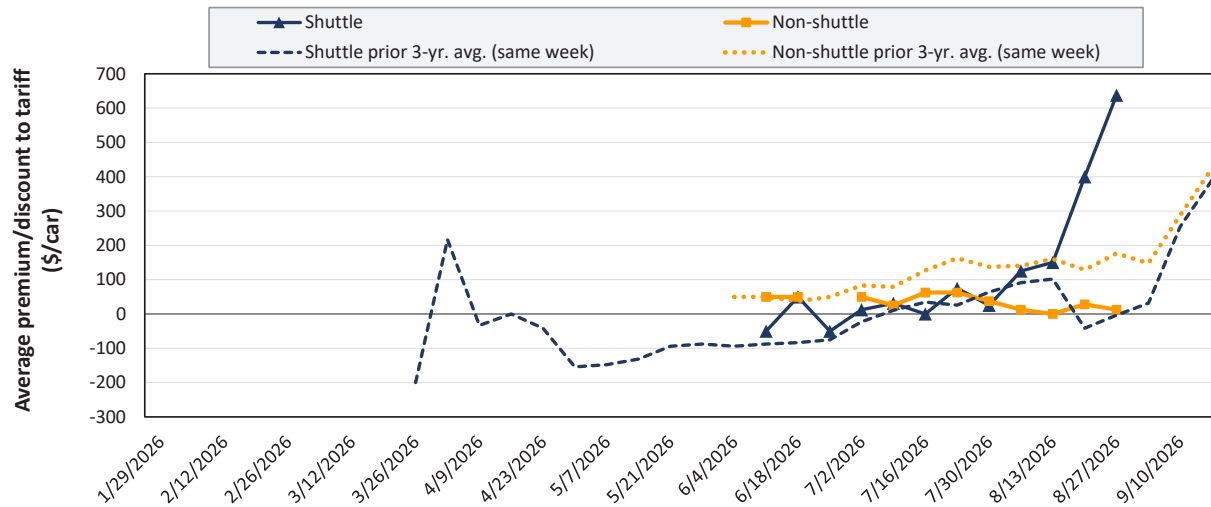


In July 2026, BNSF Railway's average monthly grain shuttle turns were 1.6 to Mexico, 2.3 to the Pacific Northwest, and 3.3 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.7 to California and Arizona, and they averaged 1.5 to Mexico.

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

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., 1 year). This ordering system is referred to as the “primary market.” Once grain shippers acquire guaranteed freight on the primary market, they can trade that freight with other shippers through a broker. These transactions are referred to as the “secondary market.” Secondary rail values are indicators of rail service quality and demand/supply. The values published herein are market indicators only and do not represent guaranteed prices.

Figure 6. Secondary market bids/offers for railcars to be delivered in September 2026



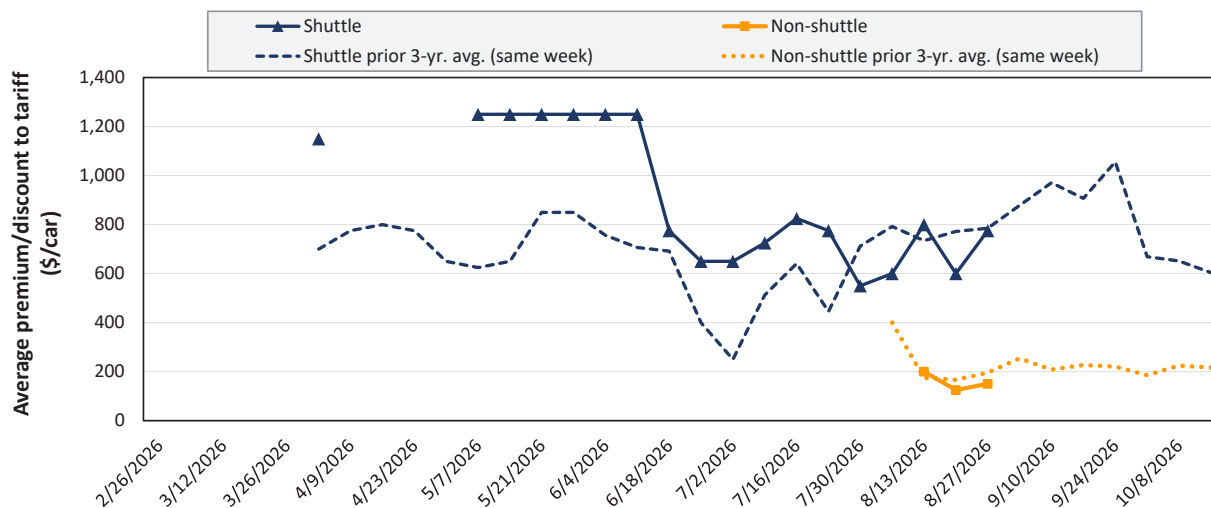
Average non-shuttle bids/offers fell \$16 this week, and are \$50 below the peak.

Average shuttle bids/offers rose \$238 this week and are at the peak.

8/27/2026	BNSF	UP
Non-Shuttle	\$25	\$0
Shuttle	\$675	\$600

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad. Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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



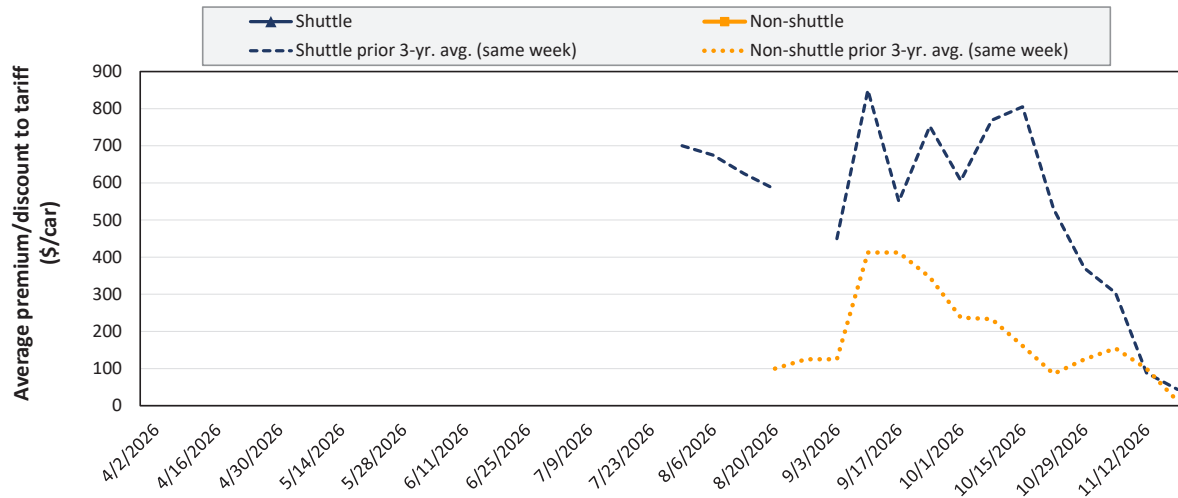
Average non-shuttle bids/offers rose \$25 this week, and are \$50 below the peak.

Average shuttle bids/offers rose \$175 this week and are \$475 below the peak.

8/27/2026	BNSF	UP
Non-Shuttle	\$100	\$200
Shuttle	\$800	\$750

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad. Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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



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

There were no shuttle bids/offers this week.

8/27/2026	BNSF	UP
Non-Shuttle	n/a	n/a
Shuttle	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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

For the week ending: 8/27/2026		Delivery period					
		Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27
Non-shuttle	BNSF	n/a	25	100	n/a	n/a	n/a
	Change from last week	n/a	-25	50	n/a	n/a	n/a
	Change from same week 2025	n/a	-42	-50	n/a	n/a	n/a
	UP	n/a	0	200	n/a	n/a	n/a
	Change from last week	n/a	-6	0	n/a	n/a	n/a
	Change from same week 2025	n/a	100	125	n/a	n/a	n/a
Shuttle	BNSF	500	675	800	n/a	n/a	n/a
	Change from last week	100	275	0	n/a	n/a	n/a
	Change from same week 2025	n/a	875	438	n/a	n/a	n/a
	UP	600	600	750	n/a	200	n/a
	Change from last week	350	200	350	n/a	n/a	n/a
	Change from same week 2025	n/a	708	550	n/a	n/a	n/a
	CPKC	500	400	300	n/a	n/a	n/a
	Change from last week	0	100	0	n/a	n/a	n/a
	Change from same week 2025	n/a	350	100	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—110+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from the Malsam Company.

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

Table 6. Rail tariff rates for wheat shipments, September 2026

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	\$5,984	\$432	\$6,416	\$1.73	\$63.71	7.6
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,466	\$216	\$4,682	\$1.27	\$46.49	7.4
	CPKC	Westby, MT	St. Louis, MO	Unit	\$6,013	\$1,056	\$7,069	\$1.91	\$70.20	12.4
	UP	Yuma, AZ	Houston, TX	Manifest	\$6,025	\$796	\$6,821	\$1.84	\$67.74	5.1
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$5,029	\$250	\$5,279	\$1.43	\$52.43	8.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,365	\$602	\$6,967	\$1.88	\$69.18	9.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$3,040	\$116	\$3,156	\$0.85	\$31.34	8.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,882	\$626	\$6,508	\$1.76	\$64.63	10.3
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,963	\$530	\$6,493	\$1.75	\$64.48	8.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,562	\$440	\$6,002	\$1.62	\$59.60	8.6
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,448	\$935	\$6,383	\$1.73	\$63.39	11.2
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,255	\$562	\$5,817	\$1.57	\$57.76	9.8
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$228	\$3,628	\$0.98	\$36.02	4.5
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,400	\$279	\$3,679	\$0.99	\$36.53	0.5
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$752	\$6,552	\$1.77	\$65.06	9.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,600	\$529	\$6,129	\$1.66	\$60.86	4.7
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$385	\$4,585	\$1.24	\$45.53	6.8
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$398	\$4,398	\$1.19	\$43.67	7.7
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$328	\$3,828	\$1.03	\$38.01	6.5
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$223	\$3,923	\$1.06	\$38.96	4.1
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$356	\$4,256	\$1.15	\$42.27	7.2
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$675	\$5,200	\$1.41	\$51.63	5.7
	UP	Goodland, KS	Kansas City, MO	Manifest	\$5,067	\$252	\$5,319	\$1.44	\$52.82	4.0
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$333	\$4,108	\$1.11	\$40.79	3.5
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$444	\$4,469	\$1.21	\$44.38	4.3
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,964	\$270	\$5,234	\$1.41	\$51.98	7.3
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,589	\$341	\$4,930	\$1.33	\$48.96	9.0
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,082	\$168	\$2,250	\$0.61	\$22.34	8.8
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$8,611	\$251	\$8,862	\$2.40	\$88.01	6.2
	CSX	Chicago, IL	Albany, NY	Unit	\$7,676	\$251	\$7,927	\$2.14	\$78.72	6.9
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,102	\$161	\$6,263	\$1.69	\$62.19	5.7
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$8,832	\$429	\$9,261	\$2.50	\$91.96	8.1

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

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

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

Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	\$5,600	\$390	\$5,990	\$1.51	\$59.48	1.2
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,470	\$670	\$6,140	\$1.55	\$60.97	8.6
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,460	\$645	\$6,105	\$1.54	\$60.63	-1.5
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,500	\$275	\$4,775	\$1.20	\$47.42	-6.7
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,350	\$740	\$6,090	\$1.54	\$60.48	9.9
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$329	\$4,949	\$1.25	\$49.15	6.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,260	\$269	\$4,529	\$1.14	\$44.97	-7.3
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,000	\$414	\$4,414	\$1.11	\$43.83	-4.9
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,430	\$583	\$6,013	\$1.52	\$59.71	7.6
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,430	\$660	\$6,090	\$1.54	\$60.48	8.5
	CN	Gibson City, IL	Reserve, LA	Private	\$2,411	\$605	\$3,016	\$0.76	\$29.95	19.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,791	\$605	\$3,396	\$0.86	\$33.72	16.7
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,342	\$84	\$1,426	\$0.36	\$14.17	2.5
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,047	\$1,075	\$6,122	\$1.54	\$60.80	10.2
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$1,035	\$6,548	\$1.65	\$65.02	9.1
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,241	\$219	\$6,460	\$1.63	\$64.16	8.4
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,378	\$242	\$6,620	\$1.67	\$65.74	7.8
	CSX	Olney, IL	Fairmount, GA	Railroad	\$4,891	\$155	\$5,046	\$1.27	\$50.11	7.2
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$3,935	\$401	\$4,336	\$1.09	\$43.06	0.4
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$5,855	\$912	\$6,767	\$1.71	\$67.20	3.5
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,015	\$1,007	\$7,022	\$1.77	\$69.74	4.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$4,855	\$414	\$5,269	\$1.33	\$52.32	0.4
	UP	Sloan, IA	Burley, ID	Railroad	\$5,535	\$682	\$6,217	\$1.57	\$61.74	2.2
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,075	\$419	\$4,494	\$1.13	\$44.63	0.5
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,255	\$611	\$6,866	\$1.86	\$68.18	8.9
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$582	\$5,767	\$1.56	\$57.27	7.5
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,205	\$592	\$6,797	\$1.84	\$67.50	8.8
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$311	\$3,711	\$1.00	\$36.85	6.2
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,305	\$655	\$6,960	\$1.88	\$69.11	9.4
	CN	Gibson City, IL	Reserve, LA	Private	\$2,411	\$605	\$3,016	\$0.82	\$29.95	19.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$2,791	\$605	\$3,396	\$0.92	\$33.72	16.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,785	\$1,075	\$6,860	\$1.85	\$68.13	9.0
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,526	\$813	\$4,339	\$1.17	\$43.08	10.8
	CSX	Casey, IL	Mobile, AL	Private	\$3,646	\$241	\$3,887	\$1.05	\$38.60	6.6
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,214	\$236	\$3,450	\$0.93	\$34.26	7.3
	UP	Canton, KS	Houston, TX	Railroad	\$3,875	\$433	\$4,308	\$1.16	\$42.78	10.4
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,365	\$906	\$6,271	\$1.69	\$62.27	10.6
	UP	Cozad, NE	Houston, TX	Railroad	\$4,235	\$625	\$4,860	\$1.31	\$48.26	11.1
	UP	Sloan, IA	Ama, LA	Railroad	\$4,315	\$714	\$5,029	\$1.36	\$49.94	11.5

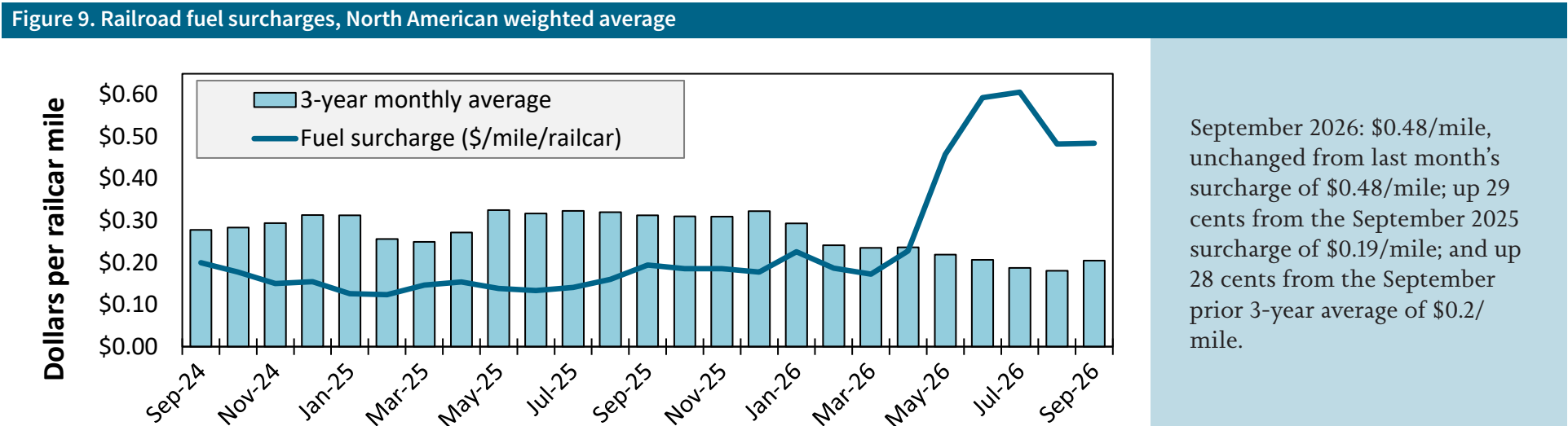
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage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

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

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

Commodity	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Adair, IL	El Paso, TX	Shuttle	\$4,641	\$449	\$5,090	\$1.27	\$50.10	8.3
	BNSF	Superior, NE	El Paso, TX	Shuttle	\$4,622	\$353	\$4,975	\$1.24	\$48.96	-2.7
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$912	\$5,992	\$1.50	\$58.97	6.9
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	\$5,550	\$1,010	\$6,560	\$1.64	\$64.56	7.0
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$871	\$5,876	\$1.47	\$57.83	6.7
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	\$5,190	\$924	\$6,114	\$1.53	\$60.17	6.8
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	\$4,535	\$741	\$5,276	\$1.32	\$51.93	3.1
Soybeans	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,655	\$769	\$5,424	\$1.36	\$53.38	3.2
	BNSF	Brunswick, MO	El Paso, TX	Shuttle	\$3,585	\$381	\$3,966	\$1.06	\$39.03	-10.8
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	\$3,585	\$379	\$3,964	\$1.06	\$39.01	-10.8
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$912	\$5,992	\$1.60	\$58.97	6.9
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$871	\$5,876	\$1.57	\$57.83	6.7
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	\$5,175	\$705	\$5,880	\$1.57	\$57.87	9.6
Wheat	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,260	\$738	\$5,998	\$1.61	\$59.03	9.7
	BNSF	FT Worth, TX	El Paso, TX	DET	\$3,100	\$275	\$3,375	\$0.90	\$33.22	9.4
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	\$2,600	\$275	\$2,875	\$0.77	\$28.30	-0.4
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$871	\$5,876	\$1.57	\$57.83	6.7
	UP	Great Bend, KS	Laredo, TX	Shuttle	\$4,325	\$529	\$4,854	\$1.30	\$47.77	4.7
	UP	Wichita, KS	Laredo, TX	Shuttle	\$4,065	\$466	\$4,531	\$1.21	\$44.59	4.4

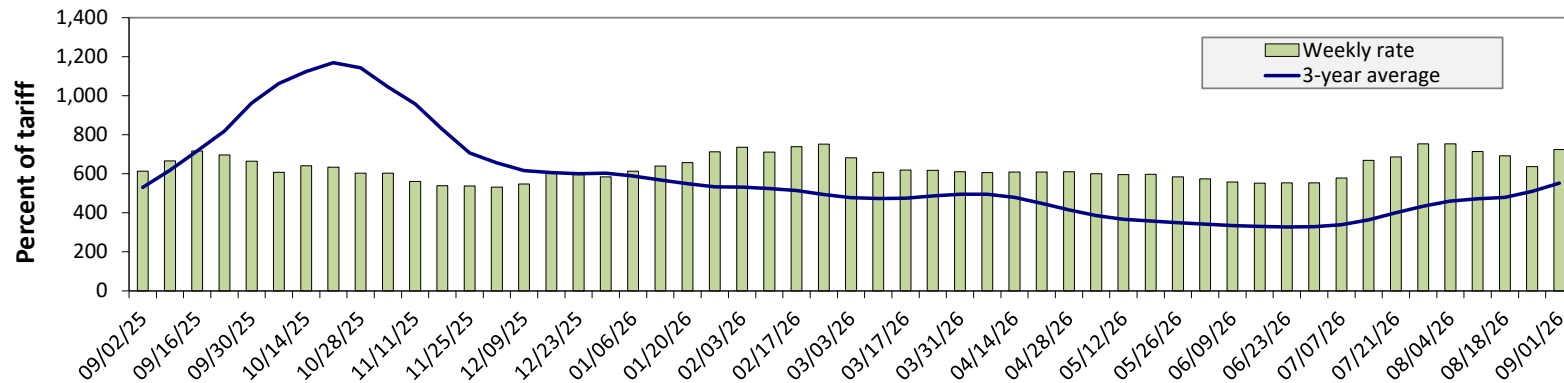
Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments that continue into Mexico, and the total cost of the shipment would include a separate rate obtained from a Mexican railroad. The rates apply to jumbo covered hopper ("C114") cars. The "shuttle" train type applies to qualified shipments (typically, 110 cars) that meet railroad efficiency requirements. The "non-shuttle" train type applies to Canadian Pacific Kansas City Railway (CPKC) shipments and is made up of 75 cars or more (except the Marshall, MO, rate is for a 50-74 car train). BNSF Railway's domestic efficiency trains (DET) are shuttle-length trains (typically 110 cars) that can be split en route for unloading at multiple destinations. Percentage change month to month (M/M) and year to year (Y/Y) are calculated using the tariff rate plus fuel surcharge. For a larger list of to-the-border rates, see [AgTransport](#). Source: BNSF Railway, Union Pacific Railroad, and CPKC (formerly, Kansas City Southern Railway).



September 2026: \$0.48/mile, unchanged from last month's surcharge of \$0.48/mile; up 29 cents from the September 2025 surcharge of \$0.19/mile; and up 28 cents from the September prior 3-year average of \$0.2/ mile.

Note: Weighted by each Class I railroad's proportion of grain traffic for the prior year. Source: BNSF Railway, Canadian National Railway, CSX Transportation, Canadian Pacific Kansas City Railway, Union Pacific Railroad, Norfolk Southern Corporation.

Figure 10. Illinois River barge freight rate



For the week ending September 1: 14 percent higher than the previous week; 18 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	9/1/2026	775	732	725	683	721	678
	8/25/2026	727	689	638	580	638	538
\$/ton	9/1/2026	47.97	38.94	33.64	27.25	33.81	21.29
	8/25/2026	45.00	36.65	29.60	23.14	29.92	16.89
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	24	18	18	35	29	33
	3-year avg.	31	30	31	35	37	22
Rate	October	957	925	919	845	897	781
	December	n/a	n/a	686	588	625	534

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](#).

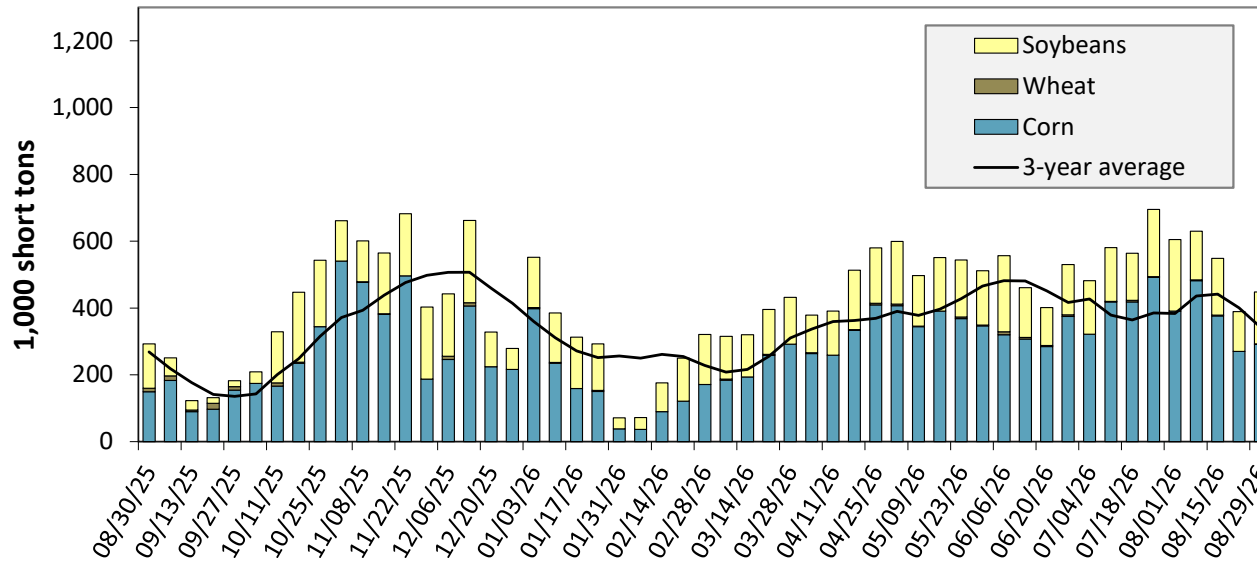
Source: USDA, Agricultural Marketing Service.

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 29: 53 percent higher than last year and 31 percent higher than the 3-year average.

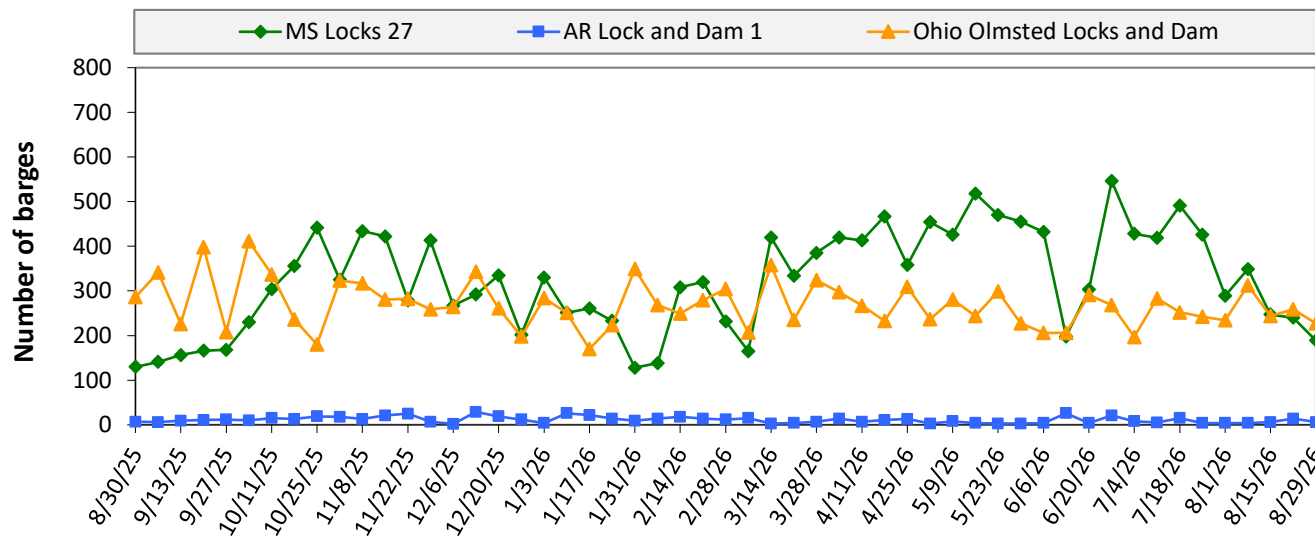
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/29/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	41	0	36	0	76
Mississippi River (Winfield, MO (L25))	190	2	79	0	270
Mississippi River (Alton, IL (L26))	213	2	123	0	338
Mississippi River (Granite City, IL (L27))	291	2	155	0	448
Illinois River (La Grange)	0	0	0	0	0
Ohio River (Olmsted)	25	15	36	0	75
Arkansas River (L1)	6	6	6	0	17
Weekly total - 2026	322	22	196	0	540
Weekly total - 2025	167	50	168	0	384
2026 YTD	12,237	663	6,953	64	19,916
2025 YTD	13,788	946	7,531	130	22,395
2026 as % of 2025 YTD	89	70	92	49	89
Last 4 weeks as % of 2025	132	45	72	28	99
Total 2025	20,015	1,259	11,322	166	32,761

Note: "Other" refers to oats, barley, sorghum, and rye. Total may not add up due to rounding. YTD = year to date. Weekly total, YTD, and calendar year total include Mississippi River lock 27, Ohio River Olmsted lock, and Arkansas Lock 1. "L" (as in "L15") refers to a lock, locks, or lock and dam facility.
Source: U.S. Army Corps of Engineers.

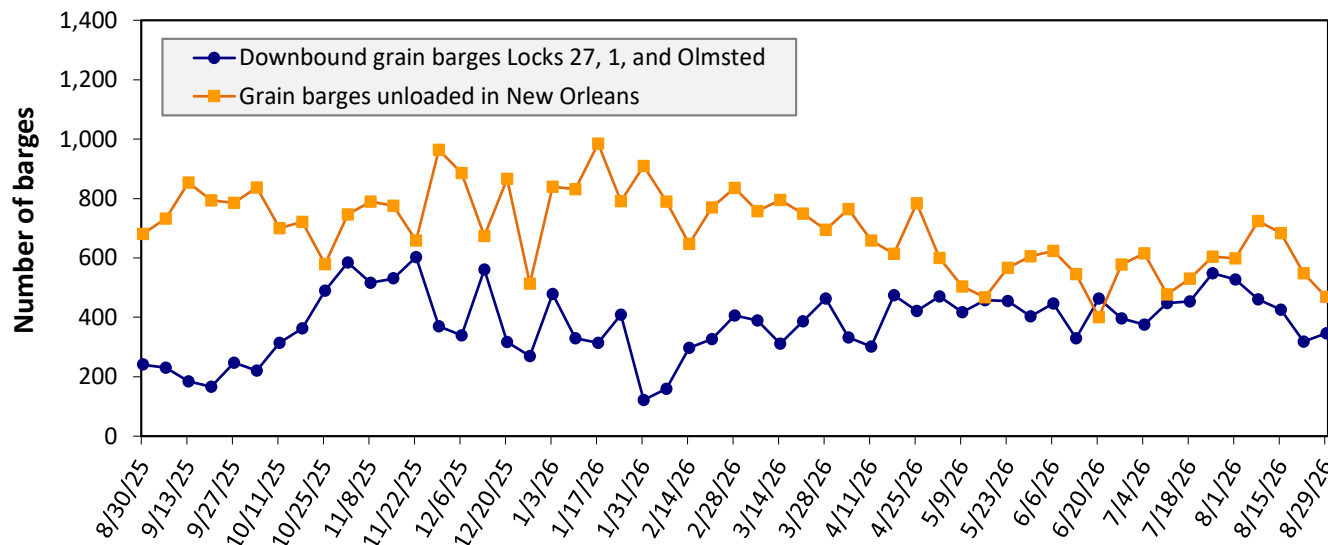
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending August 29: 422 barges transited the locks, 91 barges fewer than the previous week, and 1 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 29: 346 barges moved down river, 27 more than the previous week; 468 grain barges unloaded in the New Orleans Region, 15 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	
		September 2026	August 2026	September 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$24.73	\$24.76	\$23.18	6.7	11.4
	Central Ferry, WA/Almota, WA	\$23.77	\$23.80	\$22.25	6.8	11.6
	Lyons Ferry, WA	\$22.68	\$22.71	\$21.20	7.0	11.8
	Windust, WA/Lower Monumental, WA	\$21.57	\$21.60	\$20.13	7.2	12.0
	Sheffler, WA	\$21.54	\$21.57	\$20.10	7.2	12.0
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$20.26	\$20.29	\$18.86	7.4	12.4
	Port Kelly, WA/Wallula, WA	\$20.02	\$20.05	\$18.63	7.5	12.4
	Umatilla, OR	\$19.92	\$19.95	\$18.53	7.5	12.5
	Boardman, OR/Hogue Warner, OR	\$19.64	\$19.67	\$18.26	7.6	12.5
	Arlington, OR/Roosevelt, WA	\$19.47	\$19.50	\$18.10	7.6	12.6
	Biggs, OR	\$18.04	\$18.07	\$16.72	7.9	13.0
	The Dalles, OR	\$16.86	\$16.89	\$15.58	8.2	13.4

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

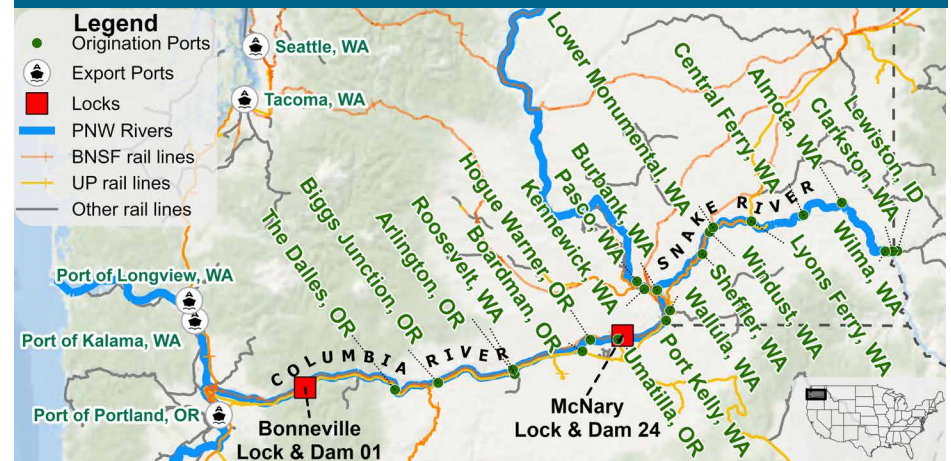
Table 12. Monthly barged grain movements, Columbia-Snake (1,000 tons)

August, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	389	0	389
Columbia River (Bonneville Lock and Dam (L1))	450	0	450
Monthly total 2025 (L1)	421	0	421
Monthly total 2025(L24)	353	0	353
2026 YTD(L1)	2,334	0	2,334
2026 YTD(L24)	1,897	0	1,897
2025 YTD(L1)	2,629	0	2,629
2025 YTD(L24)	2,297	0	2,297

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

Source: U.S. Army Corps of Engineers.

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



Source: USDA, Agricultural Marketing Service.

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

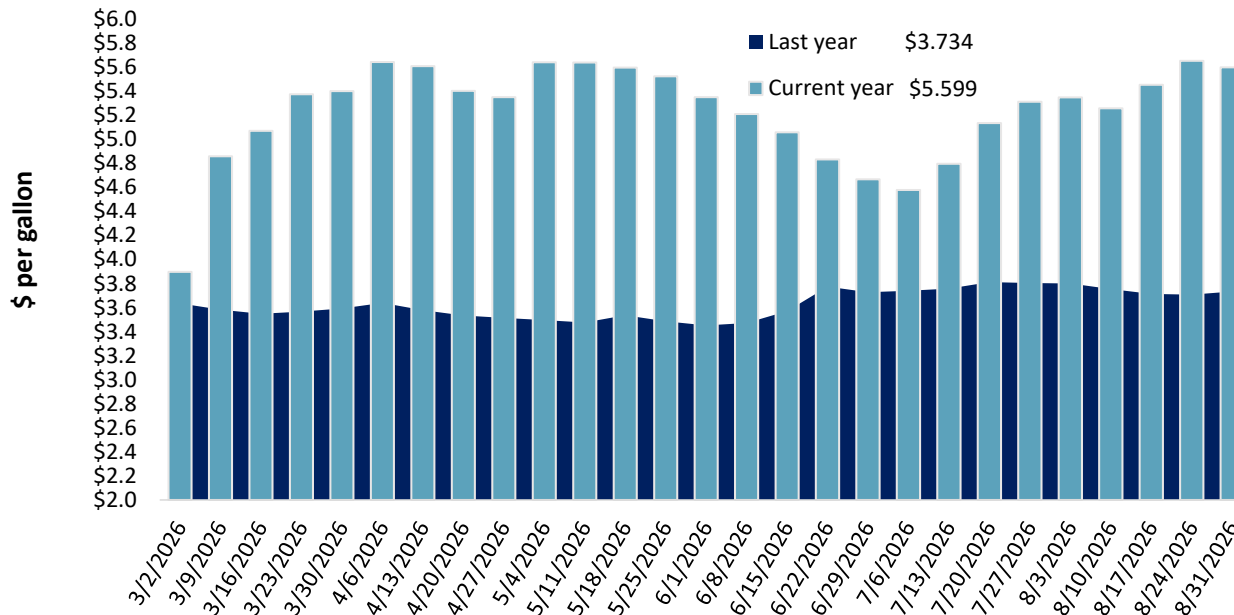
Table 13. Retail on-highway diesel prices, week ending 8/31/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.448	-0.050	1.698
	New England	5.736	0.020	1.788
	Central Atlantic	5.838	-0.002	1.926
	Lower Atlantic	5.276	-0.074	1.607
II	Midwest	5.571	-0.065	1.849
III	Gulf Coast	5.360	-0.121	1.993
IV	Rocky Mountain	5.555	0.018	1.812
V	West Coast	6.497	0.090	2.013
	West Coast less California	5.872	0.013	1.760
	California	7.218	0.178	2.304
Total	United States	5.599	-0.053	1.865

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 31, the U.S. average diesel fuel price decreased 5.3 cents from the previous week to \$5.599 per gallon, 186.5 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 08/27/2026	627	491	1,147	1,330	79	3,673	1,867	1,099	6,640
	This week year ago	2,481	674	1,391	1,302	77	5,925	1,864	1,092	8,882
	Last 4 wks. as % of same period in prior marketing year	28	77	90	98	122	65	258	153	116
Current unshipped (cummulative) export sales	Current MYTD	1,290	810	1,378	1,271	161	4,909	85,061	40,756	130,726
	Prior MYTD	2,677	1,092	1,653	955	116	6,492	68,329	49,699	124,521
	Current MYTD as % of prior MYTD	48	74	83	133	139	76	124	82	105
	Total 2025/26	8,243	3,202	6,078	5,207	622	23,419	-	-	23,419
	Total 2024/25	5,377	3,095	6,560	5,730	335	21,097	69,081	50,106	140,284
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328

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

Source: USDA, Foreign Agricultural Service.

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

For the week ending 8/27/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
Mexico	5,163	25,184	23,318	8	19,839
Japan	2306	15,754	13,511	17	10,478
Colombia	1134	8,913	7,653	16	5,493
China	0	0	33	-100	3,461
Korea	1030	9,003	6,243	44	3,127
Top 5 importers	9,633	58,854	50,757	16	42,399
Total U.S. corn export sales	14,444	86,928	70,194	24	54,276
% of YTD current month's export projection	17%	101%	96%	-	-
Change from prior week	1,986	-830	-281	-	-
Top 5 importers' share of U.S. corn export sales	67%	68%	72%	-	78%
USDA forecast August 2026	83,189	86,365	72,978	18	-
Corn use for ethanol USDA forecast August 2026	142,240	140,970	138,075	2	-

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

Source: USDA, Foreign Agricultural Service.

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

For the week ending 8/27/2026	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26	YTD MY 2024/25		
China	7,761	12,498	22,479	-44	26,078
Mexico	1,497	5,104	5,003	2	4,762
Japan	292	2,389	2,148	11	2,107
Egypt	454	5,057	3,636	39	2,098
Indonesia	95	2,611	2,152	21	1,997
Top 5 importers	10,098	27,660	35,417	-22	37,042
Total U.S. soybean export sales	16,282	41,854	50,792	-18	48,941
% of YTD current month's export projection	36%	101%	99%	-	-
Change from prior week	1948	-94	-24	-	-
Top 5 importers' share of U.S. soybean export sales	62%	66%	70%	-	76%
USDA forecast, August 2026	45,178	41,368	51,492	-20	-

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

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

For the week ending 8/27/2026	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2023-25 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26		
Mexico	1,981	2,124	-7	3,744
Philippines	1,080	1,220	-12	2,677
Japan	1,019	888	15	2,050
Korea	823	865	-5	1,888
Taiwan	477	491	-3	1,005
Nigeria	195	834	-77	878
China	NA	0	NA	863
Indonesia	240	531	-55	746
Thailand	310	298	4	690
Vietnam	207	329	-37	581
Top 10 importers	6,332	7,580	-16	15,121
Total U.S. wheat export sales	8,583	12,418	-31	21,015
% of YTD current month's export projection	41%	50%	-	-
Change from prior week	314	313	-	-
Top 10 importers' share of U.S. wheat export sales	74%	61%	-	72%
USDA forecast, August 2026	21,092	24,712	-15	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2025/26 (June 1 – May 31). “Total commitments” = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments’ change (net sales) from prior week could include revisions from previous week’s outstanding sales or accumulated sales. In rightmost column, “Exports” = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; “-” = not applicable. Source: USDA, Foreign Agricultural Service.

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

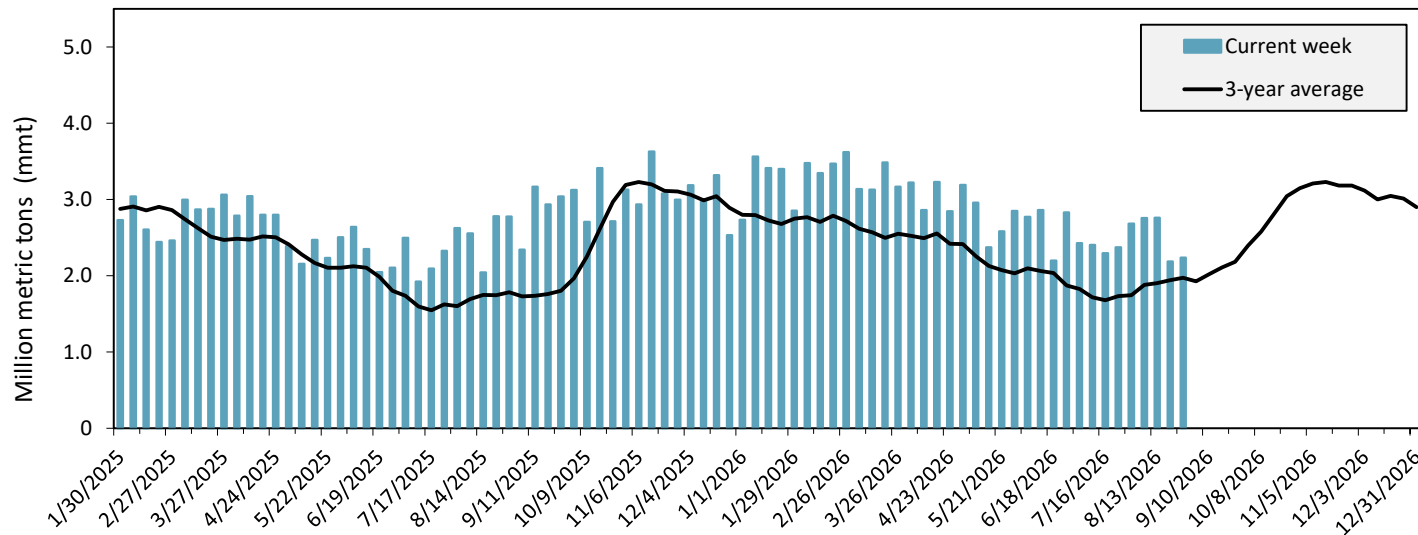
Port regions	Commodity	For the week ending 08/27/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	387	379	102	17,770	15,903	112	129	274	24,214
	Soybeans	0	0	n/a	4,181	1,966	213	n/a	39	2,957
	Wheat	286	344	83	6,979	7,489	93	103	119	12,271
	All grain	673	723	93	29,244	25,473	115	117	171	39,721
Mississippi Gulf	Corn	587	574	102	25,557	24,378	105	129	151	37,115
	Soybeans	151	346	44	14,063	12,914	109	67	83	23,350
	Wheat	24	31	77	2,168	2,863	76	42	58	3,980
	All grain	807	951	85	41,911	40,195	104	100	121	64,484
Texas Gulf	Corn	88	56	158	1,154	367	315	123	203	590
	Soybeans	0	0	n/a	100	106	94	n/a	0	1,431
	Wheat	13	12	108	2,008	3,131	64	14	30	4,690
	All grain	102	68	149	6,840	4,081	168	34	48	7,774
Interior	Corn	384	278	138	10,820	9,615	113	98	128	15,546
	Soybeans	100	84	120	4,816	4,594	105	74	95	7,713
	Wheat	73	44	165	2,086	2,152	97	77	91	3,104
	All grain	571	407	140	18,033	16,698	108	89	114	26,888
Great Lakes	Corn	0	0	n/a	337	64	523	92	275	414
	Soybeans	0	0	n/a	58	0	n/a	n/a	n/a	63
	Wheat	31	0	n/a	220	183	120	185	139	434
	All grain	31	0	n/a	615	248	248	143	163	911
Atlantic	Corn	50	36	140	1,306	243	539	437	n/a	607
	Soybeans	0	0	0	612	494	124	10	15	1,085
	Wheat	4	1	291	19	52	36	93	42	81
	All grain	54	38	144	1,938	789	246	277	425	1,773
All Regions	Corn	1,496	1,323	113	56,943	50,569	113	123	170	78,486
	Soybeans	251	430	58	24,340	20,177	121	70	84	36,852
	Wheat	431	433	100	13,480	15,871	85	69	90	24,560
	All grain	2,238	2,186	102	99,091	87,588	113	97	126	141,804

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

Source: USDA, Federal Grain Inspection Service.

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2025, approximately 51 percent of the U.S. grain-export shipments departed through the U.S. Gulf region and 28 percent departed through the PNW.

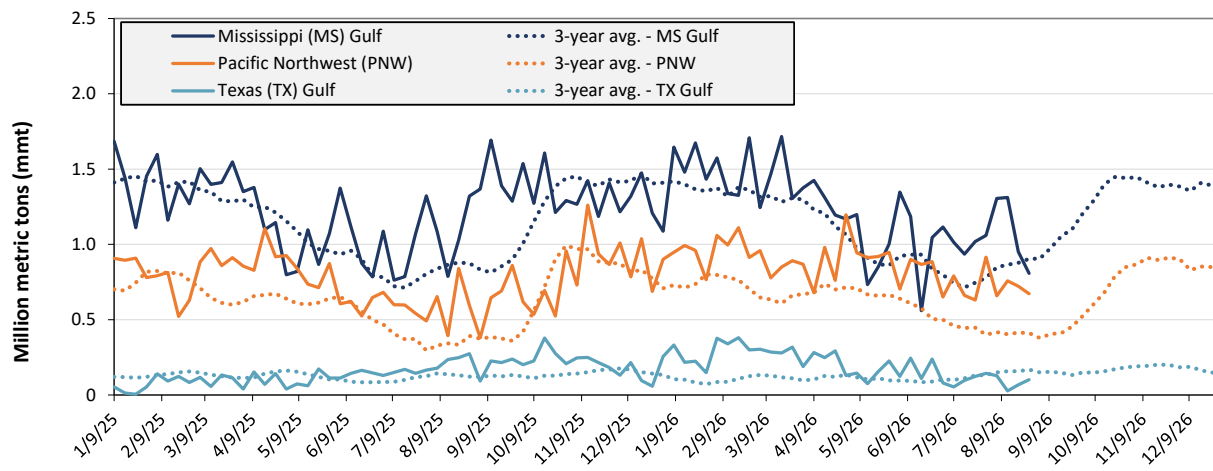
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending August 27: 2.2 mmt of grain inspected, up 2 percent from the previous week, down 20 percent from the same week last year, and up 13 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)



Source: USDA, Federal Grain Inspection Service.

Week ending 08/27/26 inspections (mmt):

MS Gulf: 0.81

PNW: 0.67

TX Gulf: 0.1

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 15	up 49	down 11	down 7
Last year (same 7 days)	down 40	down 64	down 44	up 42
3-year average (4-week moving average)	down 11	down 40	down 15	up 63

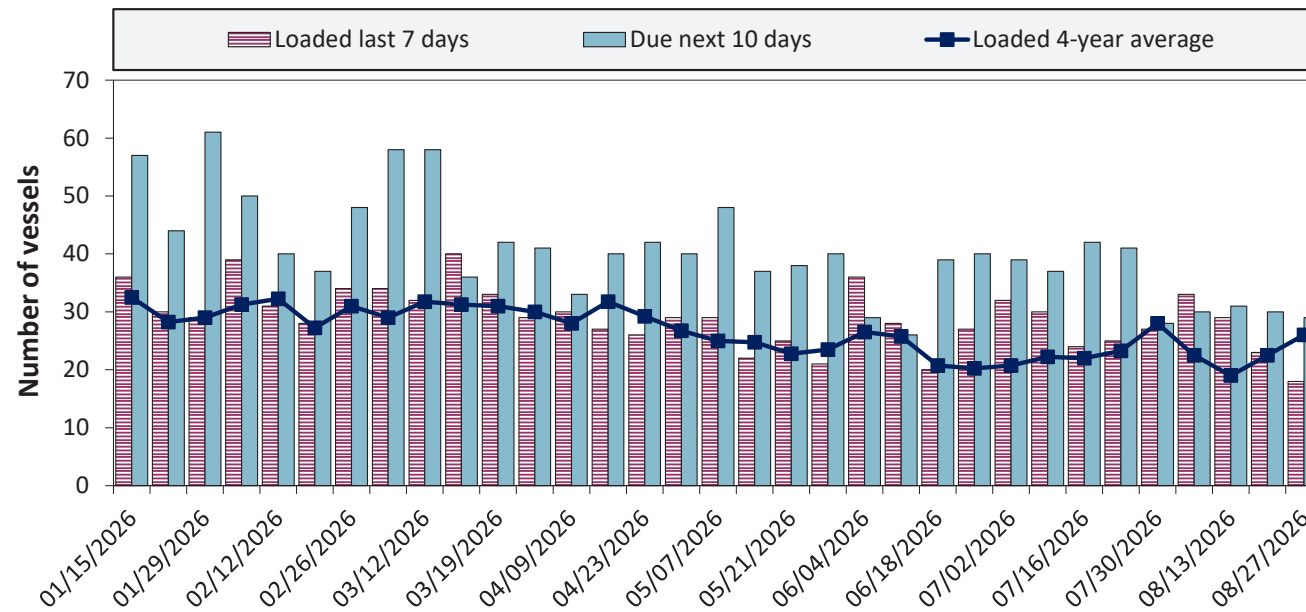
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
8/27/2026	10	18	29	13
8/20/2026	9	23	30	13
2025 range	(12...40)	(11...37)	(26...55)	(5...25)
2025 average	28	28	45	13

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

Source: USDA, Agricultural Marketing Service.

Figure 19. U.S. Gulf vessel loading activity

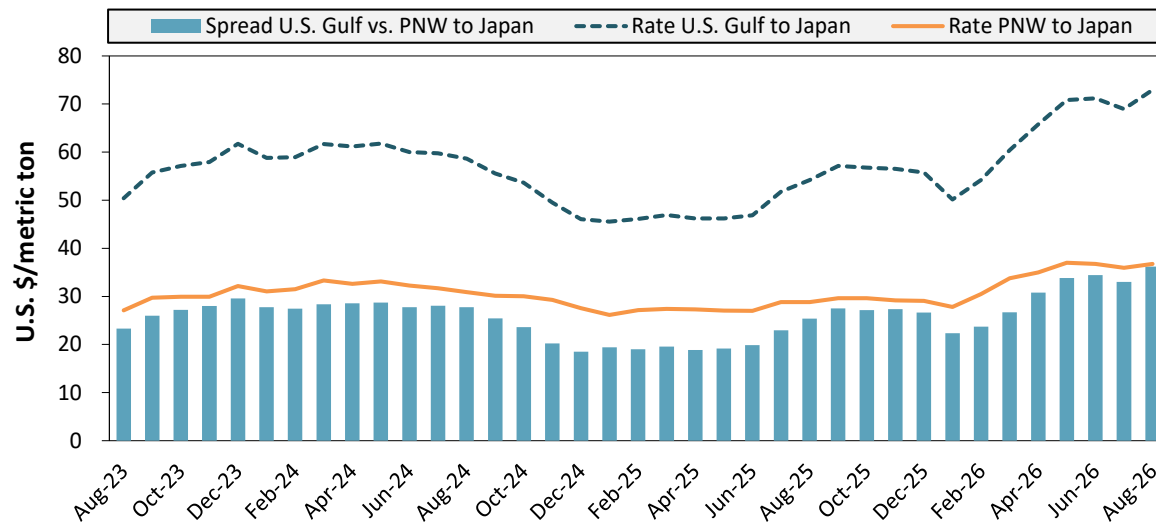


Week ending 08/27/26, number of vessels	Loaded	Due
Change from last year	-47%	-36%
Change from 4-year average	-31%	-31%

Note: U.S. Gulf includes Mississippi, Texas, and the East Gulf region.

Source: USDA, Agricultural Marketing Service.

Figure 20. U.S. Grain vessel rates, U.S. to Japan



Note: PNW = Pacific Northwest.

Source: O'Neil Commodity Consulting /World Perspectives, Inc.

Ocean rates	U.S. Gulf	PNW	Spread
August 2026	\$72.94	\$36.75	\$36.19
Change from August 2025	35%	28%	43%
Change from 4-year average	28%	18%	40%

Table 20. Ocean freight rates for selected shipments, week ending 08/29/2026

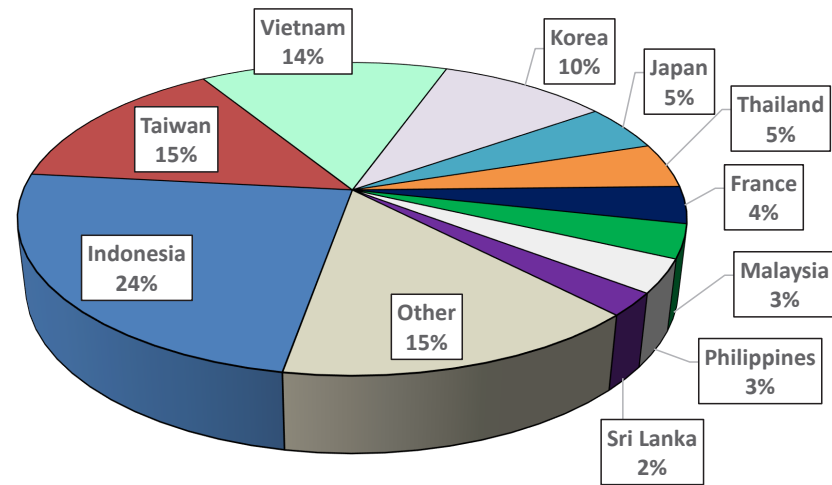
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	N. China	Heavy grain	Aug 28, 2026	Sep 1/10, 2026	68,000	73.50
U.S. Gulf	China	Heavy grain	Aug 6, 2026	Sept 2/11, 2026	66,000	69.25
PNW	Japan	Heavy grain	Aug 14, 2026	Nov 1/15, 2026	65,000	41.00
PNW	China	Heavy grain	Aug 4, 2026	Sep 1/10, 2026	65,000	35.00
PNW	Taiwan	Wheat	Jun 5, 2026	Aug 1/15, 2026	59,000	47.95
PNW	Taiwan	Wheat	Apr 2, 2026	May 30/Jun 13, 2026	51,300	52.00
Brazil	China	Heavy grain	Aug 19, 2026	Sep 15/20, 2026	64,000	51.15
Brazil	China	Heavy grain	Aug 12, 2026	Aug 20/30, 2026	63,000	50.50
Brazil	China	Heavy grain	Jul 29, 2026	Aug 21/30, 2026	63,000	49.75
Brazil	China	Heavy grain	Jul 29, 2026	Aug 15/20, 2026	63,000	50.00
Brazil	China	Heavy grain	Jul 24, 2026	Aug 14/19, 2026	66,000	52.00
Brazil	N. China	Soybeans	May 29, 2026	Jun 24/29, 2026	63,000	52.25
Brazil	N. China	Heavy grain	May 28, 2026	Jun 21/30, 2026	66,000	55.50
Brazil	Poland	Heavy grain	Jul 8, 2026	Aug 14/21, 2026	60,000	30.90
Brazil	Jordan	Heavy grain	Jul 30, 2026	Aug 15/30, 2026	70,000	45.00

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

Source: Maritime Research, Inc.

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

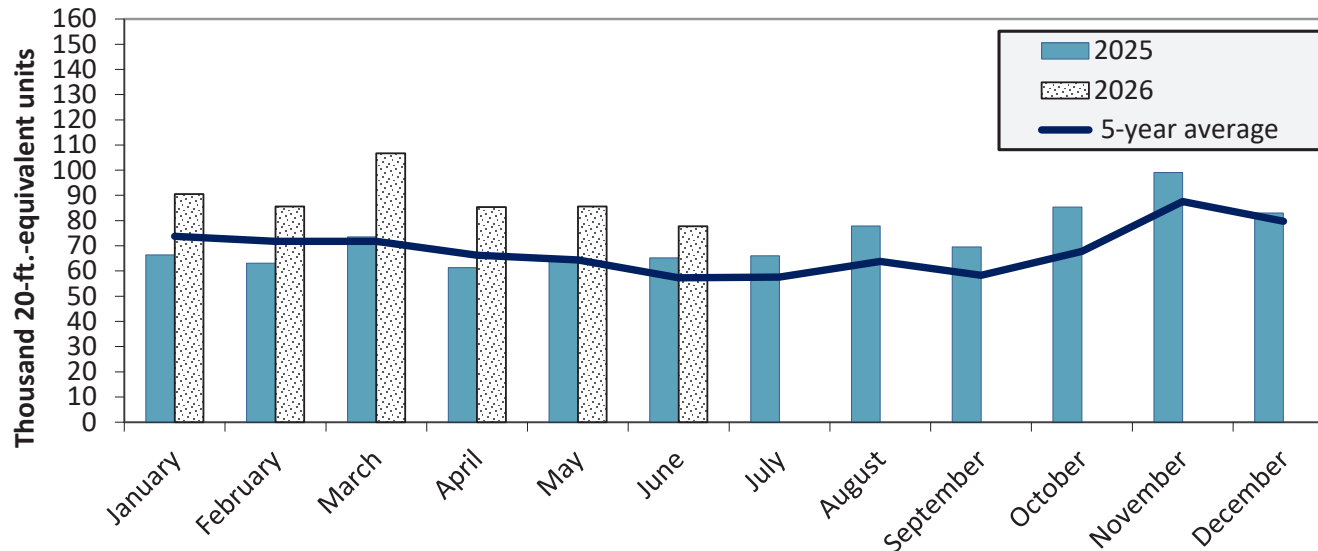
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Jun 2026



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

Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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



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

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

Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. Grain Transportation Report. September 3, 2026.

Web: <http://dx.doi.org/10.9752/TS056.09-03-2026>

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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