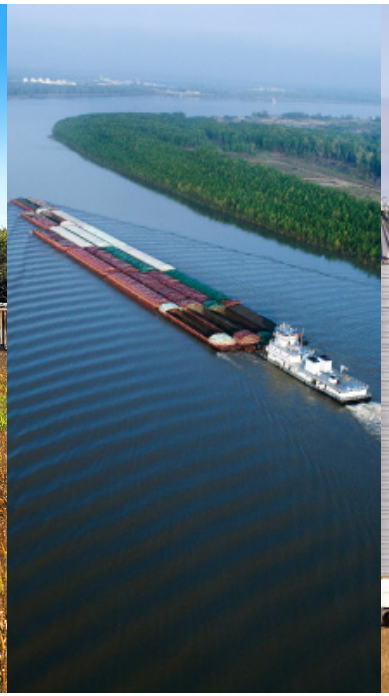
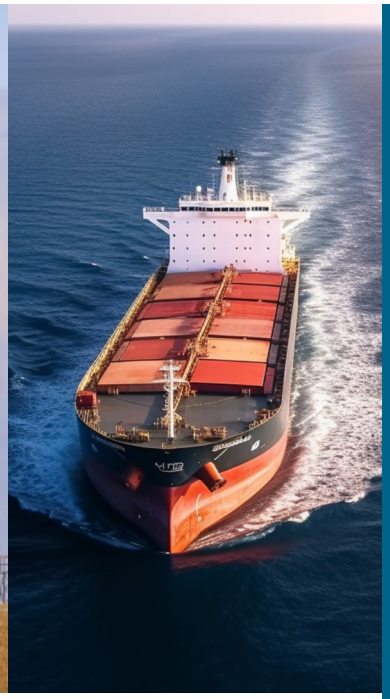
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

September 4, 2025
A weekly publication of the Agricultural Marketing Service
www.ams.usda.gov/GTR

Draft and Tow Sizes Restricted for Lower Mississippi River. Following an extra-dry August for much of the Mid-South and Ohio River Valley, water levels are falling on the lower Mississippi River. On September 2, the river gauge at Memphis, TN, fell below 0 feet for the first time since February, but still exceeded the level of last September 2 (–6 feet).

On September 2, in response to the low water, the U.S. Coast Guard began applying restrictions to barge traffic on the lower Mississippi River. For southbound traffic, draft levels may not exceed 11.5 feet, and tows may not be more than 7 barges wide. For northbound traffic, draft levels may not exceed 11 feet, and tows may not be more than 5-6 barges wide (depending on the load size) and 7 barges long.

The National Oceanic and Atmospheric Administration's (NOAA) National Weather Service forecasts below-average precipitation for the Mid-South and Ohio River Valley for the next couple of weeks, which may further reduce river levels. According to NOAA, by September 18, the river gauge at Memphis, TN, is expected to drop to –4.8 feet (the low-water threshold). If the forecast proves accurate, further draft and tow-size restrictions may follow.

BNSF and UP Reduce Soybean Rail Tariff Rates for MY 2025/26. On September 1, both BNSF Railway (BNSF) and Union Pacific Railroad (UP) adjusted their soybean rail tariff rates for marketing year (MY) 2025/26.

These changes are now reflected in Grain Transportation Report (GTR) table 7 and GTR table 8. Although BNSF kept rates to Pacific Northwest (PNW) export terminals the same, the railroad significantly reduced rates to Mexico (by $1,000 per car) and the Texas Gulf (by $1,500 per car). Unlike in previous years, every elevator on BNSF's shuttle network has a lower tariff rate to the Texas Gulf and Mexico than to the PNW (GTR, August 7, 2025). UP likewise reduced soybean rail tariff rates to the U.S. Gulf by $1,500 per car; to Mexico by $1,300 per car; and to the PNW by $1,000 per car.

As noted in this year's National Grain Car Council meeting (GTR, August 28, 2025), China (historically, the largest buyer of U.S. soybeans) has yet to book its first soybean purchases for MY 2025/26. The absence of these purchases reduces the demand for rail shipments to PNW export terminals.

STB Approves Watco's Purchase of Michigan Short Line Railroad. On August 29, the Surface Transportation Board (STB) approved the acquisition of Great Lakes Central Railroad (GLC) by Watco Holdings, Inc.—a short line railroad holding company.

GLC is a Class III railroad that operates on approximately 380 miles of track in Michigan. GLC interchanges with three Class I railroads—CSX Transportation, Canadian National Railway, and Norfolk Southern Railway (via Watco's Ann Arbor Railroad). GLC serves grain elevators and grain processing facilities, and its traffic mix consists largely of agricultural commodities. The counties GLC traverses produced about 20 percent of Michigan's corn and soybeans in 2022, according to the *Census of Agriculture*.

In its application, Watco expressed a desire to modernize GLC's infrastructure, improve service reliability, and ensure safer operations. To accomplish these aims, Watco plans to invest approximately $3.7 million in GLC's network.

TGM Renovates Illinois Grain Elevator. Total Grain Marketing FS (TGM) recently completed significant upgrades to its Negoa, IL, grain elevator. The upgrades include a new rail loadout facility, 1.5 million bushels of additional storage capacity, and two new dump pits.

According to TGM's general manager, the new rail loadout facility will allow the Negoa elevator to load 105-car unit trains in 10 to 12 hours, compared to the 72 hours the same process used to take.

Located on Canadian National Railway, the Negoa elevator ships grain unit trains to U.S. Gulf export terminals in Louisiana, as well as poultry feed mills in Mississippi.

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 21, **unshipped balances** of corn and soybeans totaled 5.46 million metric tons (mmt), down 24 percent from last week and up 15 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 6.50 mmt, down 6 percent from last week and up 30 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were –0.02 mmt, up 56 percent from last week. Net **soybean export sales** were –0.19 mmt, down significantly from last week. Net **wheat export sales** for MY 2025/26 were 0.58 mmt, up 12 percent from last week.

Rail

U.S. Class I railroads originated 24,946 **grain carloads** during the week ending August 23. This was a 2-percent decrease from the previous week, 13 percent more than last year, and 21 percent more than the 3-year average.

Average September **shuttle secondary railcar bids/offers** (per car) were $154 below tariff for the week ending August 28. This was $129 less than last week and $355 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $17 below tariff. This was $29 less than last week, and $417 lower than this week last year.

Barge

For the week ending August 30, **barged grain movements** totaled 384,200 tons. This was 21 percent less than the previous week and 20 percent less than the same period last year.

For the week ending August 30, 241 grain barges **moved down river**—68 fewer than last week. There were 681 grain **barges unloaded** in the New Orleans region, unchanged from last week.

Ocean

For the week ending August 28, 34 **oceangoing grain vessels** were loaded in the Gulf—36 percent more than the same period last year. Within the next 10 days (starting August 29), 45 vessels were expected to be loaded—4 percent fewer than the same period last year.

As of August 28, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $56.00, up 5 percent from the previous week. The rate from the Pacific Northwest to Japan was $29.25 per mt, up 3 percent from the previous week.

Fuel

For the week ending September 1, the **U.S. average diesel fuel price** increased 2.6 cents from the previous week to $3.734 per gallon, 10.9 cents above the same week last year.

Transportation Costs of Grain to Mexico Fell in Second Quarter 2025 From First Quarter 2025

Given Mexico's status as a major buyer of U.S. grain, low landed costs (transportation costs + farm values) for U.S.-Mexico routes are vital to the competitiveness of U.S. grain (corn, soybeans, and wheat) in Mexico and globally. This article examines the costs of transporting U.S. grain to Mexico over land to various U.S.-Mexico border locations (land routes) and by sea to Veracruz (water routes), tracking changes over time (table 1).

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

Cost	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2024 2nd qtr.	2025 1st qtr.	2025 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 2nd qtr.	2025 1st qtr.	2025 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	CORN									
	Illinois origin					Iowa origin				
Truck	16.47	21.68	18.07	9.7	-16.7	7.06	7.24	6.49	-8.1	-10.4
Rail	-	-	-	-	-	60.21	59.61	59.84	-0.6	0.4
Barge	15.96	27.77	24.29	52.2	-12.5	-	-	-	-	-
Ocean	17.70	13.64	13.35	-24.6	-2.1	-	-	-	-	-
Total transportation cost	50.13	63.09	55.71	11.1	-11.7	67.27	66.85	66.33	-1.4	-0.8
Farm value	171.12	174.66	180.44	5.4	3.3	180.17	177.02	180.31	0.1	1.9
Landed cost	221.25	237.75	236.15	6.7	-0.7	247.44	243.87	246.64	-0.3	1.1
Transport % of landed cost	23	27	24	1	-3	27	27	27	0	-1
Cost	**Water route (to Veracruz) $/metric ton**					**Land route (to U.S.-Mexico border locations) $/metric ton**				
	2024 2nd qtr.	**2025 1st qtr.**	**2025 2nd qtr.**	**Percent change yr. to yr.**	**Percent change qtr. to qtr.**	**2024 2nd qtr.**	**2025 1st qtr.**	**2025 2nd qtr.**	**Percent change yr. to yr.**	**Percent change qtr. to qtr.**
	SOYBEANS									
	Illinois origin					Missouri origin				
Truck	16.47	21.68	18.07	9.7	-16.7	7.06	7.24	6.49	-8.1	-10.4
Rail	-	-	-	-	-	54.52	53.27	53.41	-2.0	0.3
Barge	15.96	27.77	24.29	52.2	-12.5	-	-	-	-	-
Ocean	17.70	13.64	13.35	-24.6	-2.1	-	-	-	-	-
Total transportation cost	50.13	63.09	55.71	11.1	-11.7	61.58	60.51	59.90	-2.7	-1.0
Farm value	436.03	376.01	388.26	-11.0	3.3	436.03	374.79	384.58	-11.8	2.6
Landed cost	486.16	439.10	443.97	-8.7	1.1	497.61	435.30	444.48	-10.7	2.1
Transport % of landed cost	10	14	13	2	-2	12	14	13	1	0

table 1 continues on page 5

table 1 continues from page 4

Cost	Water route (to Veracruz) $/metric ton					Land route (to U.S.-Mexico border locations) $/metric ton				
	2024 2nd qtr.	2025 1st qtr.	2025 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.	2024 2nd qtr.	2025 1st qtr.	2025 2nd qtr.	Percent change yr. to yr.	Percent change qtr. to qtr.
	WHEAT									
	Kansas origin					Kansas origin				
Truck	7.06	7.24	6.49	-8.1	-10.4	7.06	7.24	6.49	-8.1	-10.4
Rail	43.16	44.35	42.70	-1.1	-3.7	48.39	45.02	44.07	-8.9	-2.1
Ocean	17.70	13.64	13.35	-24.6	-2.1	-	-	-	-	-
Total transportation cost	67.92	65.23	62.54	-7.9	-4.1	55.45	52.26	50.56	-8.8	-3.3
Farm value	217.28	195.35	183.96	-15.3	-5.8	217.28	195.35	183.96	-15.3	-5.8
Landed cost	285.20	260.58	246.50	-13.6	-5.4	272.73	247.61	234.52	-14.0	-5.3
Transport % of landed cost	24	25	25	2	0	20	21	22	1	0

Note: In 2022, because of tax changes in Mexico, all three Class I railroads that ship from the United States to Mexico (BNSF, Union Pacific, and Kansas City Southern) report only rates to the border for interchange, called Rule 11 rates. The estimated total includes the estimated tariff through-rate for shuttle train service to U.S.-Mexico border locations and the reported fuel surcharge. The estimated rate does not include any additional costs for shuttle car service. Rates may be revised from what were previously published. Source for ocean freight rates: O'Neil Commodity Consulting. Source for farm values: USDA, National Agricultural Statistics Service. Landed cost is total transportation cost plus farm value. "-" indicates data not required or applicable. Total may not add exactly because of rounding.
Source: Compiled by USDA, Agricultural Marketing Service.

Quarter-to-Quarter Transportation Costs. From first quarter 2025 to second quarter 2025 (quarter to quarter), total transportation costs fell for all grains shipped by water and land routes. Falling water-route shipping costs for corn, soybeans, and wheat reflected lower truck, barge, rail, and ocean freight rates.[1]

Truck rates fell with reduced demand for trucking services and lower diesel fuel prices during the quarter (Grain Transportation Report (GTR) fig. 16 and *Grain Truck and Ocean Rate* Advisory, second quarter 2025). Rail rates for shipping wheat from Kansas to Texas Gulf export terminals declined because of a fall in rail tariff rates that went into effect in June (GTR, June 26, 2025). Barge rates showed their typical seasonal decline after the Upper Mississippi River reopened, near the end of March, from its annual winter closure.[2] Ocean freight rates for shipping bulk items, including grain, fell slightly because of subdued cargo demand (GTR, July 31, 2025).

Land-route shipping costs for wheat decreased with falling truck and rail rates (public tariff, plus fuel surcharge). For corn and soybeans shipped by land, decreases in total transportation costs mainly reflected falling truck rates.

Year-to-Year Transportation Costs. From second quarter 2024 to second quarter 2025 (year to year), total costs of shipping corn and soybeans to Mexico by the water routes rose, because higher truck and barge rates outweighed lower ocean rates. For waterborne wheat, transportation costs fell with lower truck, rail, and ocean rates. Declines in both truck and rail rates lowered costs for land-route shipments.

Quarter-to-Quarter Landed Costs. Changes in landed costs varied by commodity (table 1 and figs. 1 and 2). Quarter to quarter, landed costs fell for water-route corn and water- and land-route wheat; rose for water- and land-route soybeans; and rose for land-route corn.

1 Water-route typically involve truck transportation to barge to oceangoing vessel, or truck to rail to oceangoing vessel.
2 Repositioning empty barges is easier when UMR is open, shippers have improved access to barges, which lowers barge rates.

For waterborne corn, landed costs dropped, because declining transportation costs outweighed increasing farm values. For wheat shipped by both routes, landed costs fell because of declining transportation costs and farm values. However, for soybeans shipped by both routes and for land-route corn, rising farm values outweighed decreases in transportation costs, pushing up landed costs.

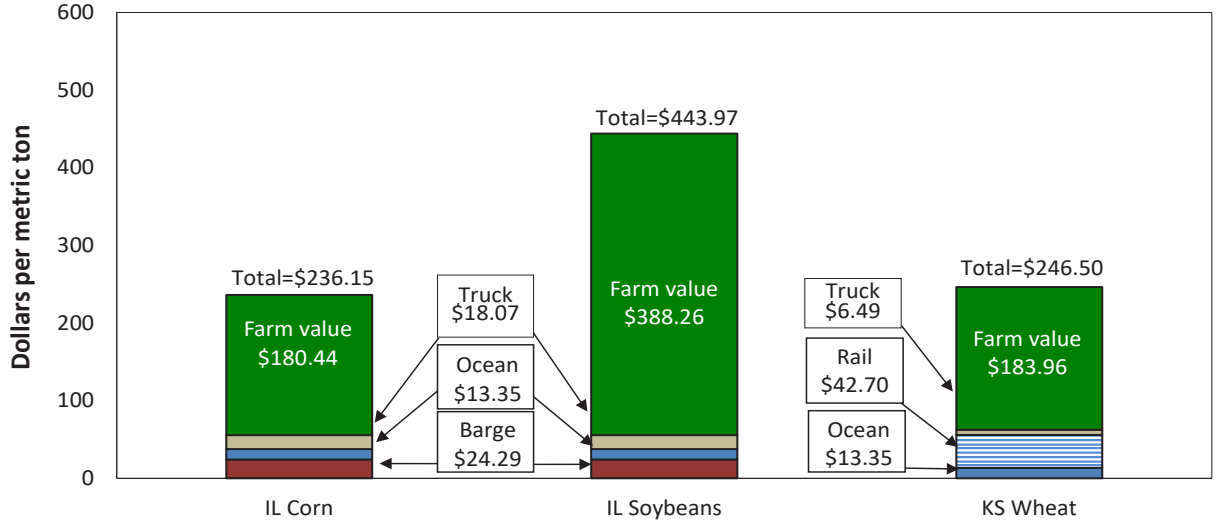
The share of landed costs comprising transportation ranged from 13 to 25 percent for the water routes and from 13 to 27 percent for the land routes. For waterborne corn and soybeans and land-route corn, transportation's share of landed costs fell. For all other grains, transportation's share of landed costs was stable.

Year-to-Year Landed Costs. Year to year, except for waterborne corn, landed costs fell, because of lower transportation costs, lower farm values, or both. In the case of waterborne corn, higher transportation costs and farm values pushed up landed costs.

U.S. Exports to Mexico. According to USDA's Foreign Agricultural Service's Global Agricultural Trade System data, in second quarter 2025, the United States exported to Mexico 6.85 million metric tons (mmt) of corn (up 21 percent quarter to quarter); 1.01 mmt of soybeans (down 12 percent quarter to quarter); and 1.02 mmt of wheat (unchanged from quarter to quarter). Year to year, U.S. exports destined to Mexico were up 13 percent for corn, up 37 percent for soybeans, and up 18 percent for wheat.

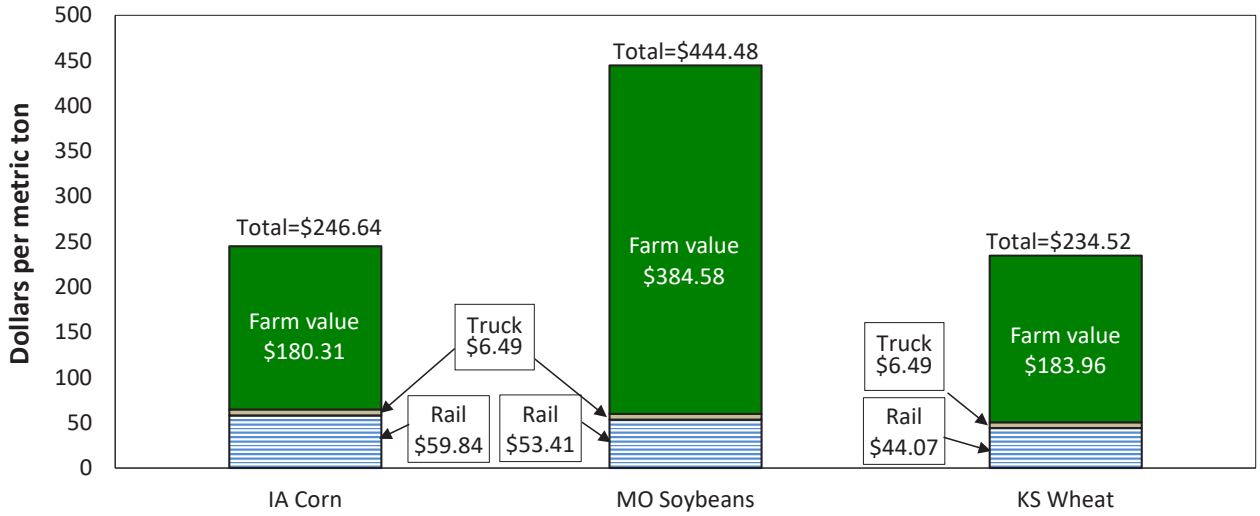
surajudeen.olowolayemo@usda.gov

Figure 1. Second-quarter 2025 water-route landed costs to Veracruz, Mexico



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

Figure 2. Second-quarter 2025 land-route landed costs to U.S.-Mexico border locations



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

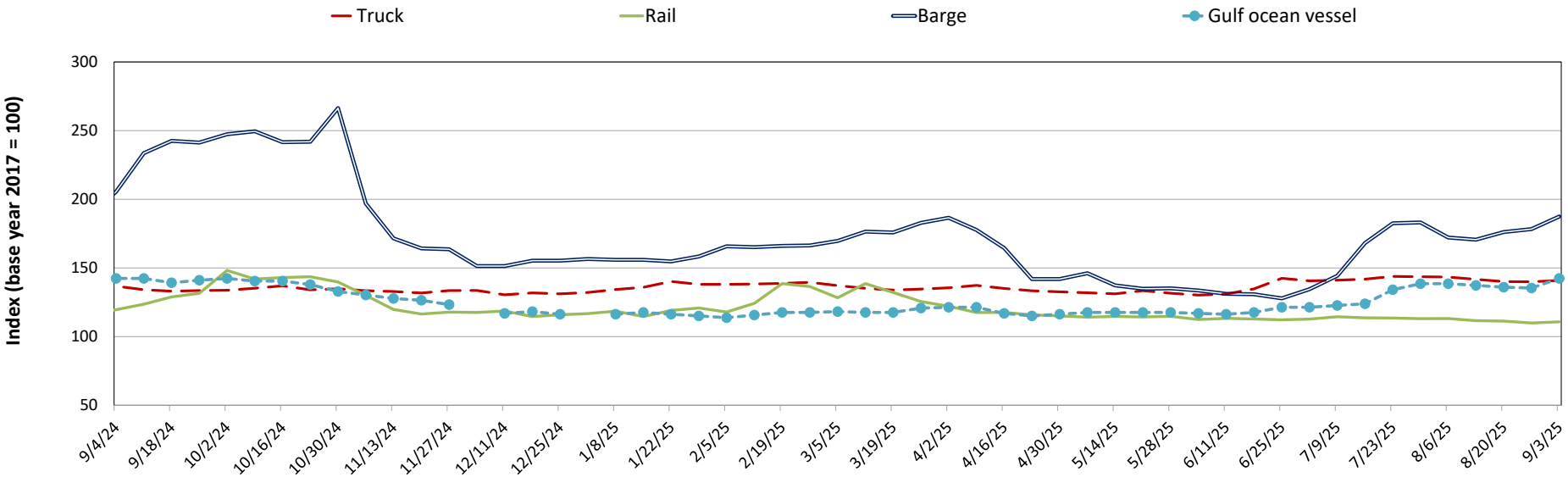
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
09/03/25	141	111	187	142	139
08/27/25	140	110	178	135	135
09/04/24	137	120	205	142	143

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.

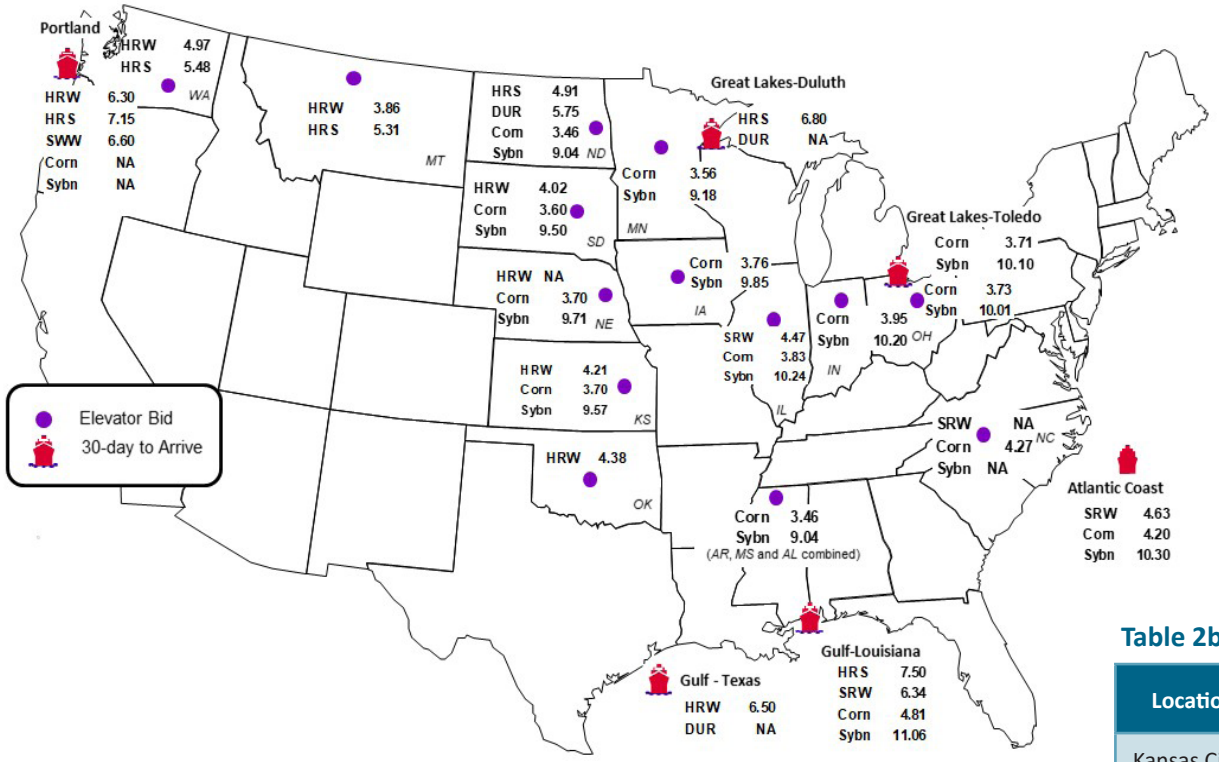
Figure 1. Grain transportation cost indicators as of week ending 9/3/25



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	8/29/2025	8/22/2025
Corn	IL–Gulf	-0.98	-0.94
Corn	NE–Gulf	-1.11	-1.12
Soybean	IA–Gulf	-1.21	-1.19
HRW	KS–Gulf	-2.29	-2.05
HRS	ND–Portland	-2.24	-2.05

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	8/29/2025	Week ago 8/22/2025	Year ago 8/30/2024
Kansas City	Wheat	Dec	5.196	5.210	5.610
Minneapolis	Wheat	Dec	5.800	5.900	6.004
Chicago	Wheat	Dec	5.342	5.272	5.494
Chicago	Corn	Dec	4.202	4.114	4.014
Chicago	Soybean	Dec	10.544	10.584	10.070

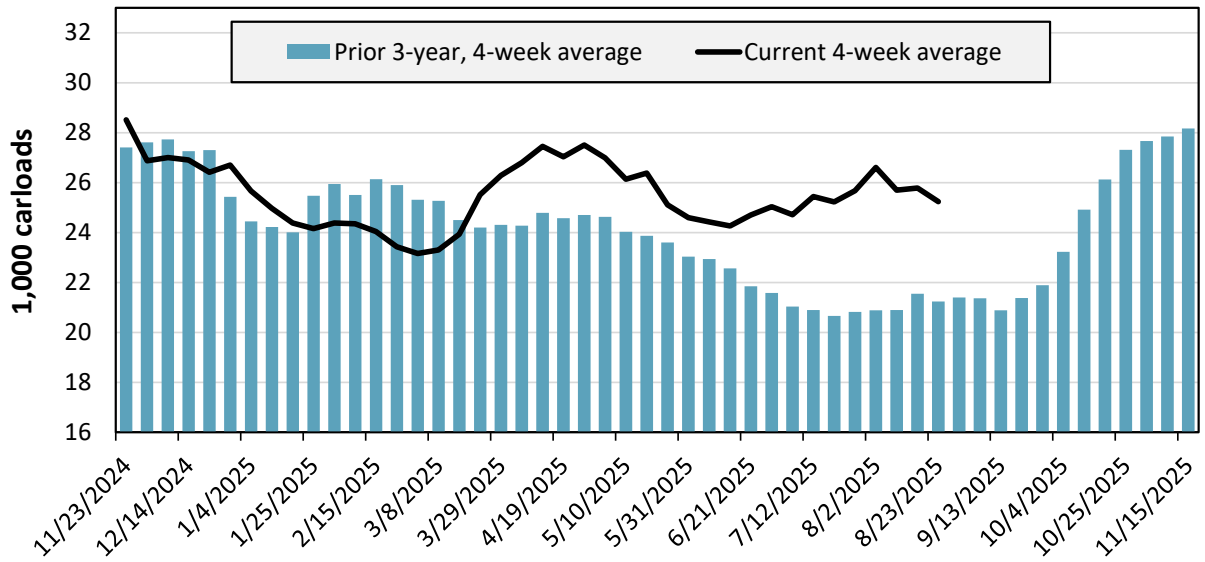
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 8/23/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	951	2,169	10,856	6,413	3,244	1,313	24,946
This week last year	1,204	2,853	9,882	4,975	2,318	906	22,138
2025 YTD	52,863	94,147	373,740	195,670	93,944	47,669	858,033
2024 YTD	56,274	91,263	351,037	173,676	91,453	31,359	795,062
2025 YTD as % of 2024 YTD	94	103	106	113	103	152	108
Last 4 weeks as % of 2024	75	83	118	115	129	160	113
Last 4 weeks as % of 3-yr. avg.	82	95	129	111	134	149	119
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 23, grain carloads were down 2 percent from the previous week, up 13 percent from last year, and up 19 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: 8/22/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	11.8	21.0	11.1	10.6	6.0	61.8	20.4
	Average over last 4 weeks	22.9	23.4	13.2	14.2	6.8	42.4	20.5
	Average of same 4 weeks last year	22.4	25.4	23.2	18.4	8.6	n/a	19.6
Average grain unit train speeds (miles per hour)	This week	22.7	18.8	23.9	23.0	23.8	14.1	21.1
	Average over last 4 weeks	22.6	19.5	23.8	22.5	23.9	14.7	21.2
	Average of same 4 weeks last year	23.2	20.3	23.3	22.0	24.5	n/a	22.7

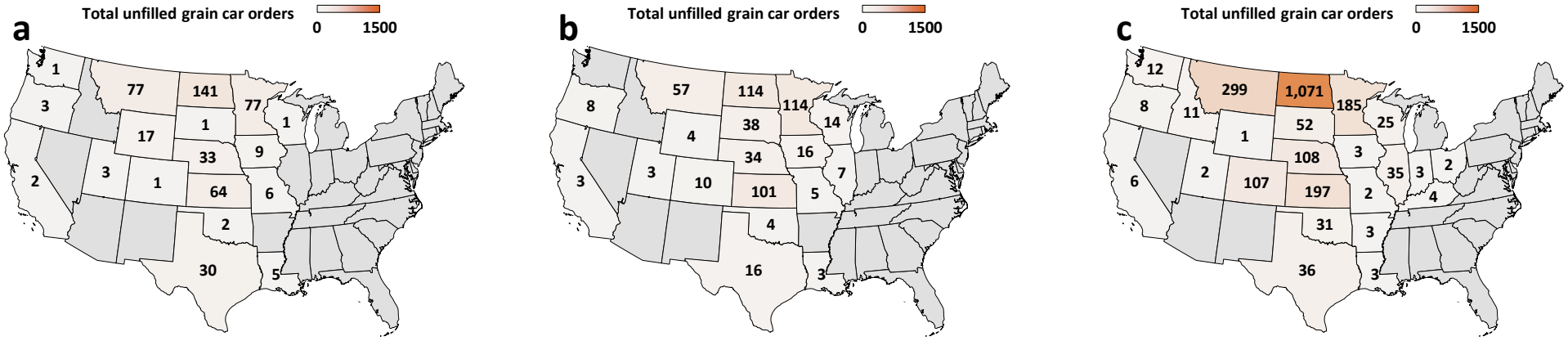
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 8/22/2025		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	19	3	225	75	13	402	737
	Average over last 4 weeks	14	6	223	67	9	395	713
	Average of same 4 weeks last year	17	7	468	127	5	n/a	624
Average number of loaded grain cars not moved in over 48 hours	This week	10	196	193	105	9	716	1,228
	Average over last 4 weeks	17	139	276	72	10	914	1,428
	Average of same 4 weeks last year	32	143	703	117	6	n/a	999
Average number of grain unit trains held	This week	0	1	3	3	0	9	16
	Average over last 4 weeks	0	1	3	4	0	8	16
	Average of same 4 weeks last year	0	0	20	7	0	n/a	28
Total unfilled manifest grain car orders	This week	0	4	154	136	0	405	699
	Average over last 4 weeks	0	2	196	189	0	228	615
	Average of same 4 weeks last year	9	2	1,637	367	0	n/a	2,015

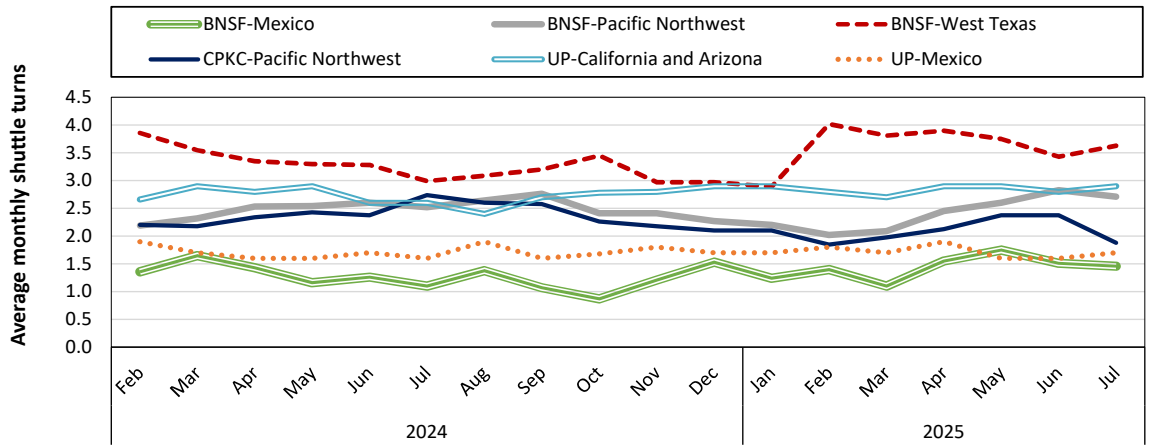
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 8/22/2025 (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

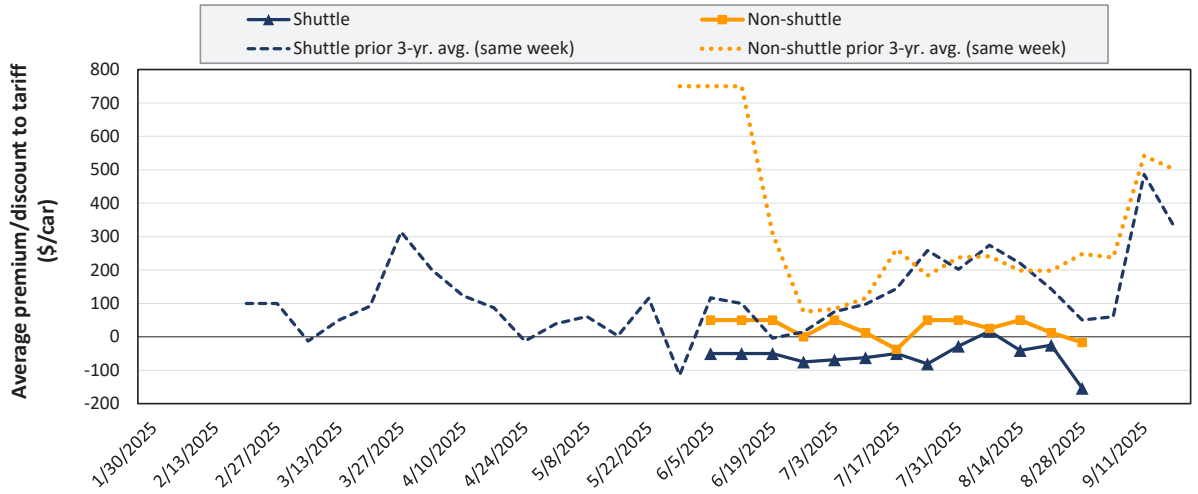


In July 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.7 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 1.9 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.9 to California and Arizona, and they averaged 1.7 to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



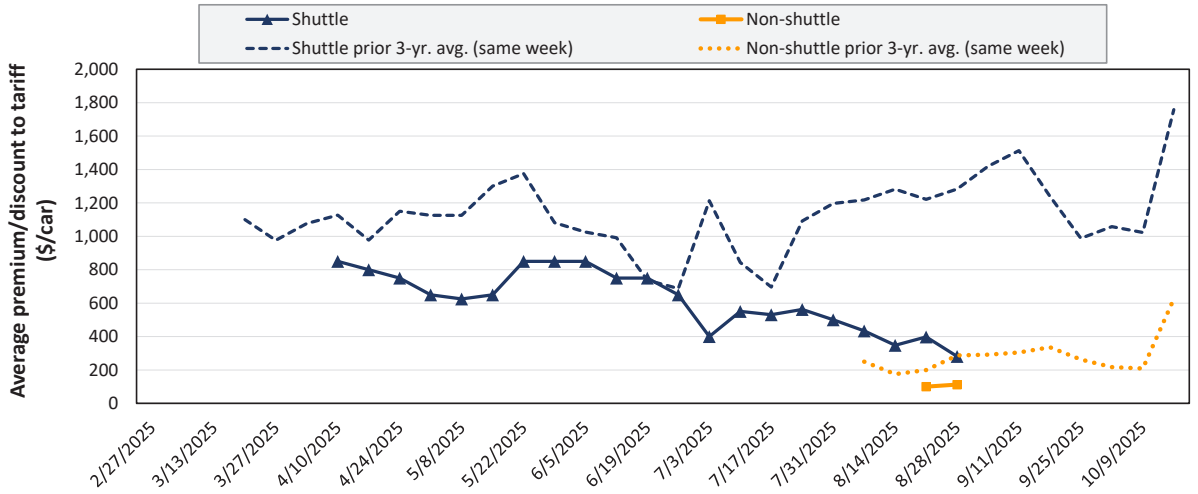
Average non-shuttle bids/offers fell $29 this week, and are $67 below the peak.

Average shuttle bids/offers fell $129 this week and are $171 below the peak.

8/28/2025	BNSF	UP
Non-Shuttle	$67	-$100
Shuttle	-$200	-$108

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



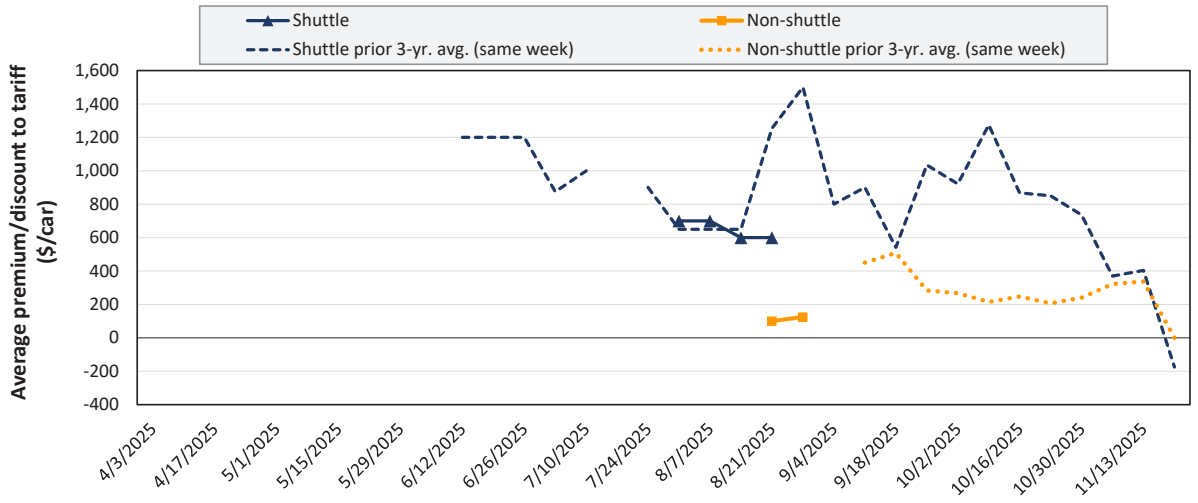
Average non-shuttle bids/offers rose $13 this week, and are at the peak.

Average shuttle bids/offers fell $117 this week and are $569 below the peak.

8/28/2025	BNSF	UP
Non-Shuttle	$150	$75
Shuttle	$363	$200

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



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

There were no shuttle bids/offers this week.

8/28/2025	BNSF	UP
Non-Shuttle	$150	$100
Shuttle	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.
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: 8/28/2025		Delivery period					
		Sep-25	Oct-25	Nov-25	Dec-25	Jan-26	Feb-26
Non-shuttle	BNSF	67	150	150	n/a	n/a	n/a
	Change from last week	-8	n/a	n/a	n/a	n/a	n/a
	Change from same week 2024	-483	-350	n/a	n/a	n/a	n/a
	UP	-100	75	100	100	n/a	n/a
	Change from last week	-50	-25	0	0	n/a	n/a
	Change from same week 2024	-350	-175	n/a	n/a	n/a	n/a
Shuttle	BNSF	-200	363	n/a	n/a	n/a	n/a
	Change from last week	-238	-209	n/a	n/a	n/a	n/a
	Change from same week 2024	-494	-863	n/a	n/a	n/a	n/a
	UP	-108	200	n/a	n/a	n/a	n/a
	Change from last week	-20	-25	n/a	n/a	n/a	n/a
	Change from same week 2024	-217	-700	n/a	n/a	n/a	n/a
	CPKC	50	200	n/a	n/a	n/a	n/a
	Change from last week	-25	0	n/a	n/a	n/a	n/a
	Change from same week 2024	n/a	-300	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, September 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	$130.57	$5,962.57	$1.61	$59.21	2.6
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,291	$67.21	$4,358.21	$1.18	$43.28	4.2
	CPKC	Westby, MT	St. Louis, MO	Unit	$5,788	$500.22	$6,288.22	$1.70	$62.45	3.4
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,804	$78.21	$4,882.21	$1.32	$48.48	3.6
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,215	$165.11	$6,380.11	$1.72	$63.36	2.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,865	$32.34	$2,897.34	$0.78	$28.77	6.9
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,732	$168.19	$5,900.19	$1.59	$58.59	4.2
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,838	$139.37	$5,977.37	$1.62	$59.36	2.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,412	$114.18	$5,526.18	$1.49	$54.88	3.0
	CPKC	Minot, ND	Kalama, WA	Unit	$5,298	$442.89	$5,740.89	$1.55	$57.01	-3.3
	CPKC	Nekoma, ND	Chicago, IL	Manifest	$5,030	$266.18	$5,296.18	$1.43	$52.59	4.0
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$70.18	$3,470.18	$0.94	$34.46	-12.0
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$61.93	$3,661.93	$0.99	$36.36	-14.5
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$209.00	$6,009.00	$1.62	$59.67	-13.9
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$151.36	$5,851.36	$1.58	$58.11	-1.4
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$94.49	$4,294.49	$1.16	$42.65	-12.6
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$83.27	$4,083.27	$1.10	$40.55	-13.5
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$95.04	$3,595.04	$0.97	$35.70	-14.8
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$69.63	$3,769.63	$1.02	$37.43	-12.6
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$70.18	$3,970.18	$1.07	$39.43	-11.9
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$395.42	$4,920.42	$1.33	$48.86	-7.7
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$147.90	$5,114.90	$1.38	$50.79	1.7
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$195.16	$3,970.16	$1.07	$39.43	-9.3
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$260.10	$4,285.10	$1.16	$42.55	-8.7
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,791	$84.92	$4,875.92	$1.32	$48.42	3.6
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,439	$83.38	$4,522.38	$1.22	$44.91	3.9
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$36.63	$2,068.63	$0.56	$20.54	-0.6
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, September 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	$117.26	$5,917.26	$1.49	$58.76	4.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$185.24	$5,655.24	$1.43	$56.16	-3.7
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$195.36	$6,195.36	$1.56	$61.52	3.8
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$80.08	$5,120.08	$1.29	$50.84	5.6
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$193.49	$5,543.49	$1.40	$55.05	-3.8
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$102.85	$4,662.85	$1.18	$46.30	6.0
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$84.04	$4,884.04	$1.23	$48.50	5.8
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$103.07	$4,643.07	$1.17	$46.11	6.0
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$156.09	$5,586.09	$1.41	$55.47	-3.6
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$183.26	$5,613.26	$1.42	$55.74	-3.7
	CN	Gibson City, IL	Reserve, LA	Private	$2,191	$338.87	$2,529.87	$0.64	$25.12	9.3
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,571	$338.87	$2,909.87	$0.73	$28.90	8.0
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,342	$49.20	$1,391.20	$0.35	$13.82	0.1
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,047	$509.36	$5,556.36	$1.40	$55.18	-2.5
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$490.14	$6,003.14	$1.51	$59.61	2.7
	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	$234.94	$4,319.94	$1.09	$42.90	6.7
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$534.48	$6,539.48	$1.65	$64.94	4.2
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$590.58	$6,755.58	$1.70	$67.09	4.0
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$242.76	$5,247.76	$1.32	$52.11	5.5
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$399.84	$6,084.84	$1.53	$60.43	4.6
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$245.82	$4,470.82	$1.13	$44.40	6.5
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$168.08	$6,303.08	$1.70	$62.59	-1.0
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$5,185	$179.74	$5,364.74	$1.45	$53.27	-22.6
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$161.59	$6,246.59	$1.69	$62.03	-0.9
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$94.05	$3,494.05	$0.94	$34.70	-24.3
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$178.64	$6,363.64	$1.72	$63.19	-1.0
	CN	Gibson City, IL	Reserve, LA	Private	$2,191	$338.87	$2,529.87	$0.68	$25.12	9.6
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,571	$338.87	$2,909.87	$0.79	$28.90	8.3
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,785	$509.36	$6,294.36	$1.70	$62.51	-2.2
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$389.31	$3,915.31	$1.06	$38.88	0.2
	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	$3,650	$253.98	$3,903.98	$1.06	$38.77	-27.9
	UP	Cozad, NE	Kalama, WA	Railroad	$5,140	$531.08	$5,671.08	$1.53	$56.32	-15.2
	UP	Cozad, NE	Houston, TX	Railroad	$4,010	$366.52	$4,376.52	$1.18	$43.46	-25.7
	UP	Sloan, IA	Ama, LA	Railroad	$4,090	$418.54	$4,508.54	$1.22	$44.77	-25.1

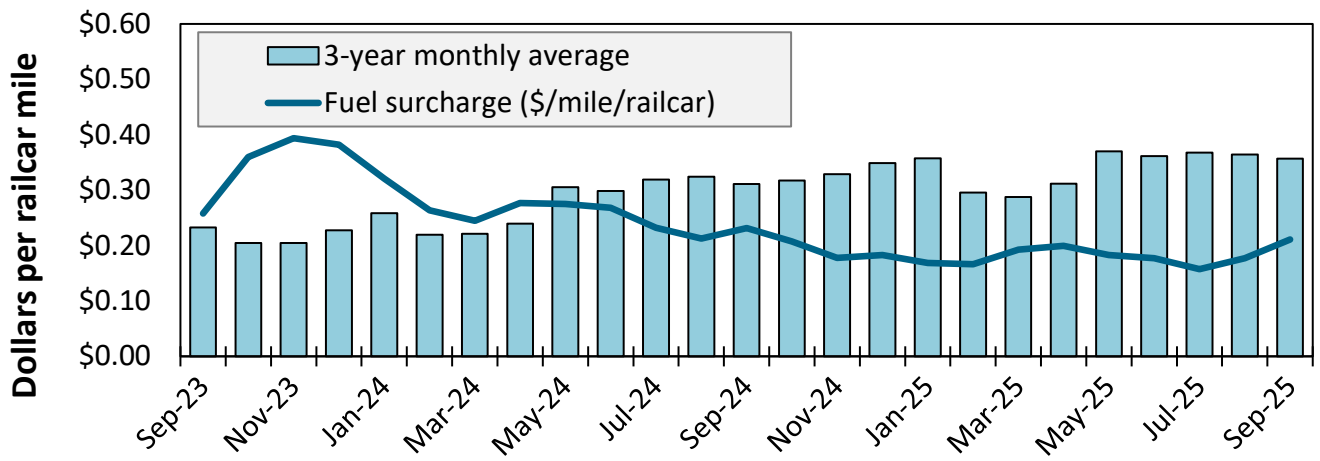
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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, September 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	$4,701	$46.27	$1.18	1.1	5.6
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,607	$55.18	$1.40	0.9	1.8
	Council Bluffs, IA	Laredo, TX	CPKC	Non-shuttle	$6,133	$60.36	$1.53	0.9	1.6
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,508	$54.21	$1.38	0.9	1.8
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,724	$56.34	$1.43	0.9	1.7
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,119	$50.38	$1.28	1.0	5.5
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,256	$51.73	$1.31	1.0	5.4
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,111	$50.30	$1.28	0.8	5.4
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,607	$55.18	$1.50	0.9	1.8
	Brunswick, MO	El Paso, TX	BNSF	Shuttle	$4,445	$43.75	$1.19	-17.7	-19.0
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$5,363	$52.78	$1.44	-18.9	-19.7
	Hardin, MO	Eagle Pass, TX	BNSF	Shuttle	$4,444	$43.74	$1.19	-17.7	-19.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,508	$54.21	$1.48	0.9	1.8
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$5,468	$53.82	$1.46	-18.6	-19.4
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,086	$30.37	$0.83	1.0	-25.7
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,886	$28.40	$0.77	1.1	-22.4
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,409	$43.39	$1.18	0.8	-9.0
	Kansas City, MO	Laredo, TX	CPKC	Non-shuttle	$5,508	$54.21	$1.48	0.9	1.8
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,297	$42.29	$1.15	0.8	-7.1

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).

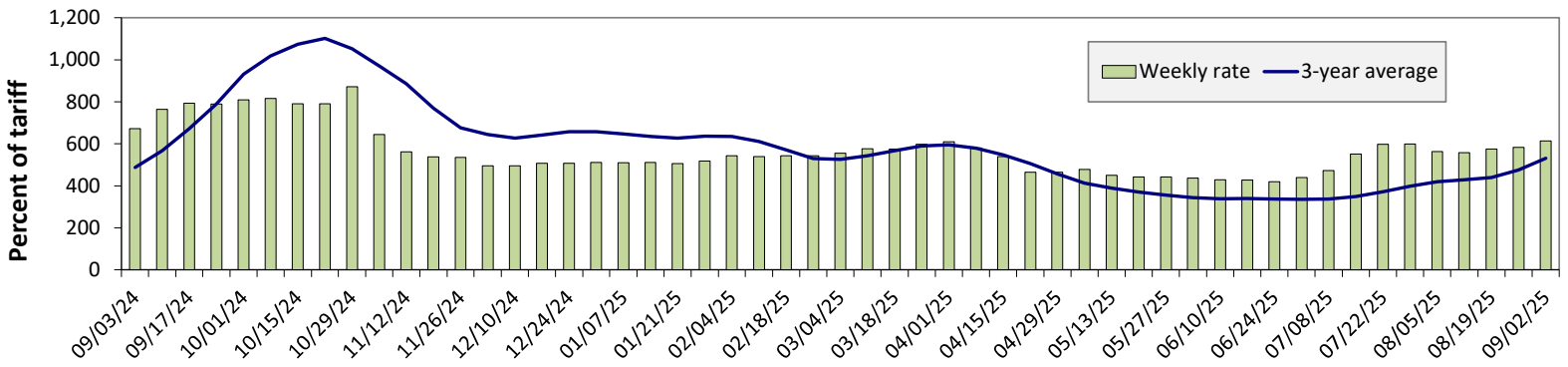
Figure 9. Railroad fuel surcharges, North American weighted average



September 2025: $0.21/mile, up 3 cents from last month’s surcharge of $0.18/mile; down 2 cents from the September 2024 surcharge of $0.23/mile; and down 15 cents from the September 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 September 2: 5 percent higher than the previous week; 9 percent lower than last year; and 16 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

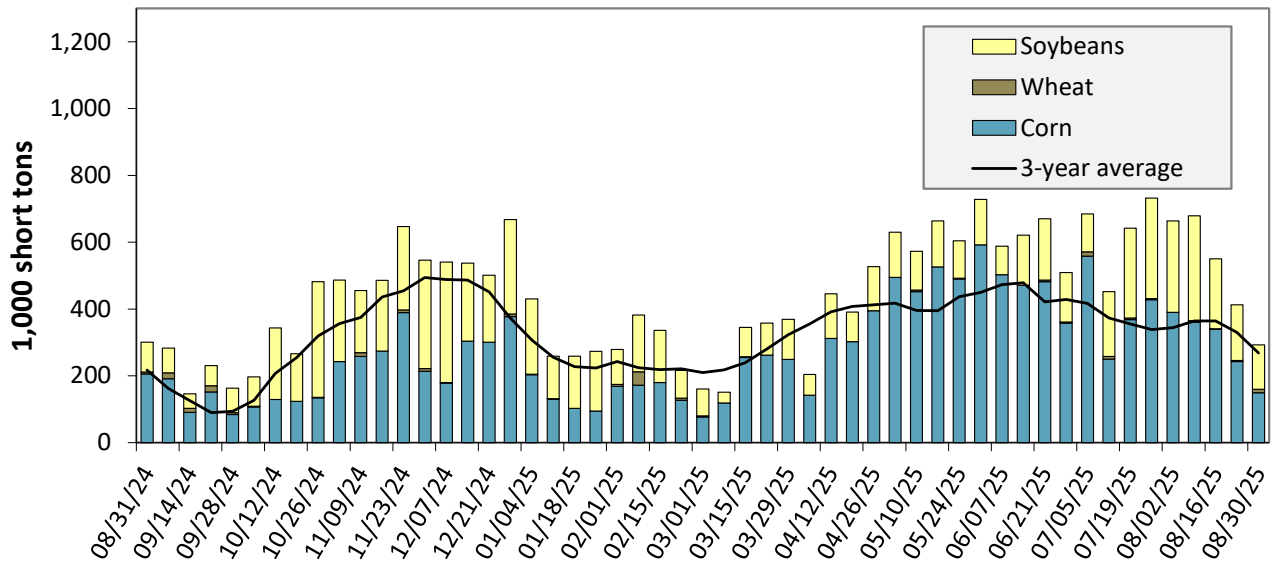
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	9/2/2025	625	619	613	506	558	511
	8/26/2025	606	599	583	467	506	475
$/ton	9/2/2025	38.69	32.93	28.44	20.19	26.17	16.05
	8/26/2025	37.51	31.87	27.05	18.63	23.73	14.92
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	-5	-9	-9	-27	-20	-33
	3-year avg.	5	12	16	2	6	-5
Rate	October	824	800	786	742	792	713
	December	0	0	575	466	543	442

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 30: 3 percent lower than last year and 9 percent higher than the 3-year average.

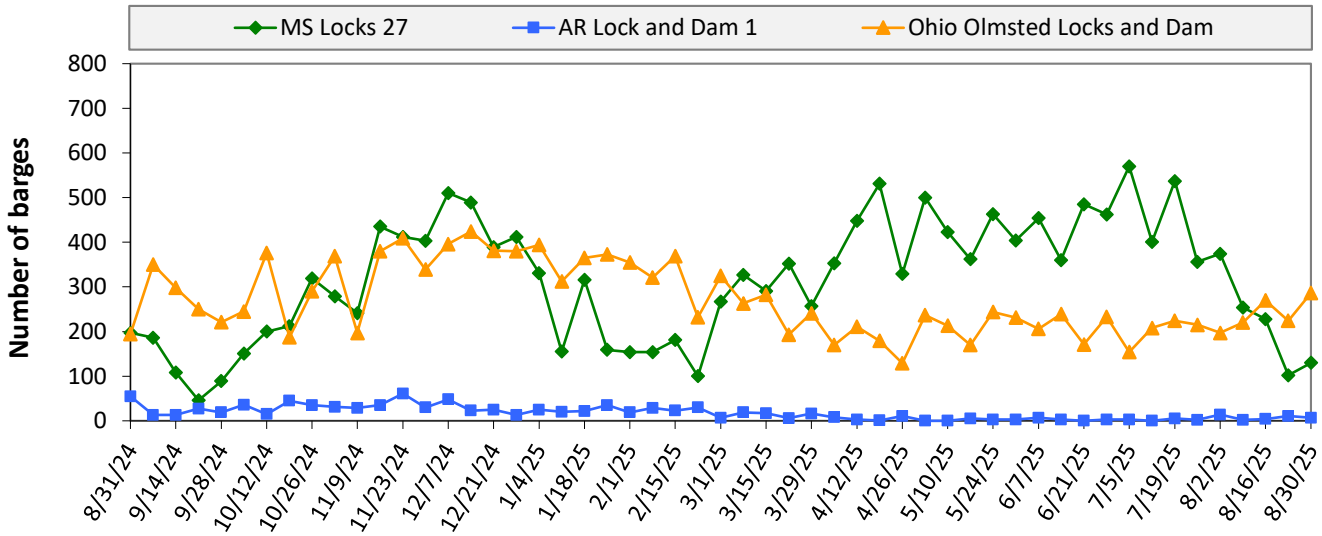
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 08/30/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	59	3	47	2	111
Mississippi River (Winfield, MO (L25))	61	8	87	0	156
Mississippi River (Alton, IL (L26))	122	8	112	0	242
Mississippi River (Granite City, IL (L27))	149	11	133	0	293
Illinois River (La Grange)	96	0	39	0	136
Ohio River (Olmsted)	15	12	30	0	56
Arkansas River (L1)	3	27	6	0	35
Weekly total - 2025	167	50	168	0	384
Weekly total - 2024	305	29	141	5	481
2025 YTD	13,788	946	7,531	130	22,395
2024 YTD	10,053	1,223	6,983	170	18,430
2025 as % of 2024 YTD	137	77	108	77	122
Last 4 weeks as % of 2024	75	104	131	21	93
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.

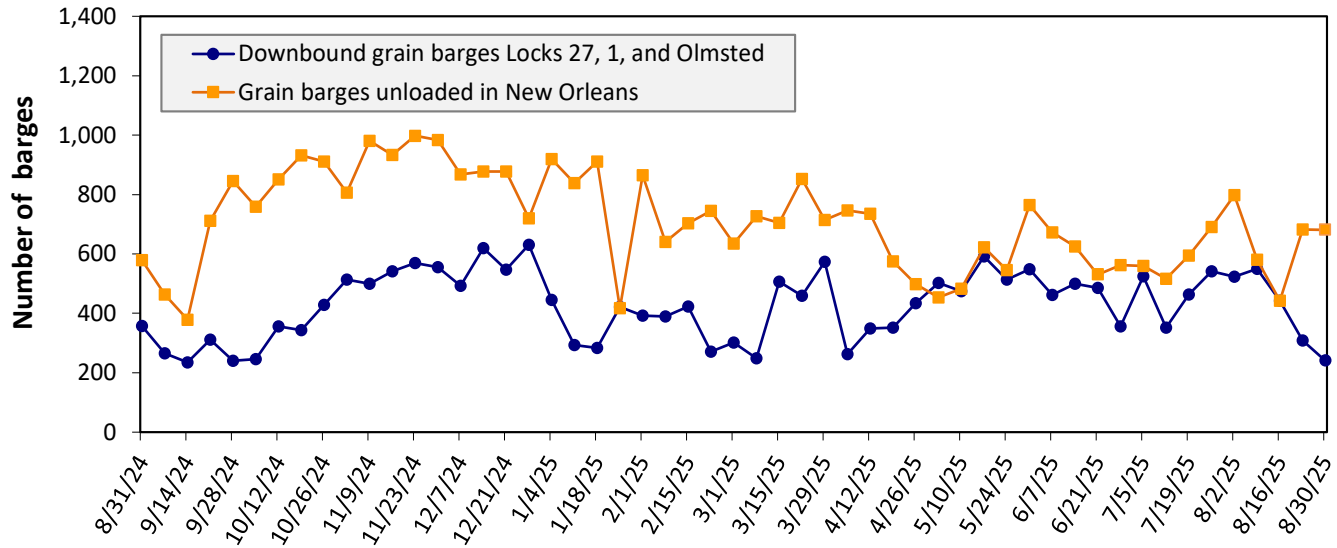
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



Source: U.S. Army Corps of Engineers.

For the week ending August 30: 423 barges transited the locks, 86 barges more than the previous week, and 3 percent higher than the 3-year average.

Figure 14. Grain barges for export in New Orleans region



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

For the week ending August 30: 241 barges moved down river, 68 fewer than the previous week; 681 grain barges unloaded in the New Orleans Region, unchanged from the previous week.

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		September 2025	August 2025	September 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$23.18	$23.06	$21.87	6.0	5.6
	Central Ferry, WA/Almota, WA	$22.25	$22.13	$20.97	6.1	5.5
	Lyons Ferry, WA	$21.20	$21.08	$19.96	6.2	5.3
	Windust, WA/Lower Monumental, WA	$20.13	$20.01	$18.93	6.3	5.2
	Sheffler, WA	$20.10	$19.98	$18.90	6.3	5.2
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$18.86	$18.74	$17.70	6.6	5.0
	Port Kelly, WA/Wallula, WA	$18.63	$18.51	$17.48	6.6	4.9
	Umatilla, OR	$18.53	$18.41	$17.38	6.6	4.9
	Boardman, OR/Hogue Warner, OR	$18.26	$18.14	$17.12	6.7	4.9
	Arlington, OR/Roosevelt, WA	$18.10	$17.98	$16.96	6.7	4.9
	Biggs, OR	$16.72	$16.60	$15.63	7.0	4.6
	The Dalles, OR	$15.58	$15.46	$14.53	7.2	4.3

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)

August, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	353	0	353
Columbia River (Bonneville Lock and Dam (L1))	421	0	421
Monthly total 2025	421	0	421
Monthly total 2024	421	0	421
2025 YTD	2,629	0	2,629
2024 YTD	2,161	0	2,161

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.

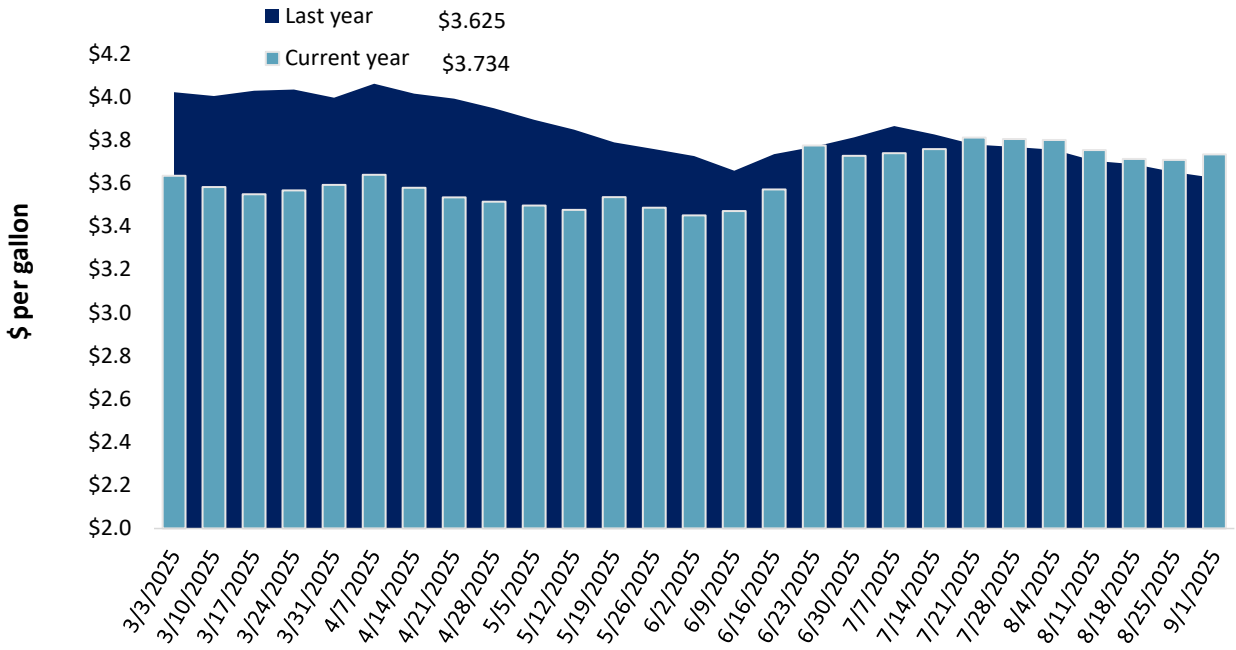
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 09/01/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.750	0.024	0.064
	New England	3.948	-0.020	0.029
	Central Atlantic	3.912	-0.004	0.004
	Lower Atlantic	3.669	0.038	0.089
II	Midwest	3.722	0.024	0.109
III	Gulf Coast	3.367	0.039	0.102
IV	Rocky Mountain	3.743	-0.005	0.153
V	West Coast	4.484	0.023	0.191
	West Coast less California	4.112	0.009	0.216
	California	4.914	0.041	0.165
Total	United States	3.734	0.026	0.109

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 September 1, the U.S. average diesel fuel price increased 2.6 cents from the previous week to $3.734 per gallon, 10.9 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 8/21/2025	2,630	858	1,612	1,330	74	6,503	3,887	1,573	11,963
	This week year ago	1,161	804	1,707	1,257	61	4,990	3,002	1,728	9,719
	Last 4 wks. as % of same period 2023/24	224	114	99	109	121	133	190	145	153
Current shipped (cumulative) exports sales	2024/25 YTD	2,394	888	1,379	825	116	5,602	66,588	49,296	121,485
	2023/24 YTD	1,233	840	1,492	1,223	94	4,881	52,949	43,870	101,700
	YTD 2024/25 as % of 2023/24	194	106	92	68	123	115	126	112	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 8/28/2025	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	6,373	23,122	22,531	3	17,746
Japan	2209	13,492	11,090	22	9,366
China	0	33	2,822	-99	8,233
Colombia	1118	7,625	6,358	20	4,383
Korea	1140	6,222	2,415	158	1,565
Top 5 importers	10,840	50,495	45,216	12	41,293
Total U.S. corn export sales	18,775	70,475	55,951	26	51,170
% of YTD current month's export projection	26%	98%	98%	-	-
Change from prior week	2,090	-18	15	-	-
Top 5 importers' share of U.S. corn export sales	58%	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 8/21/2025	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	24,518	-8	28,636
Mexico	1,830	5,058	4,829	5	4,917
Japan	205	2,147	2,196	-2	2,231
Egypt	221	3,633	1,451	150	2,228
Indonesia	117	2,155	2,229	-3	1,910
Top 5 importers	2,373	35,472	35,223	1	39,922
Total U.S. soybean export sales	7,228	50,869	45,597	12	51,302
% of YTD current month's export projection	16%	100%	99%	-	-
Change from prior week	1373	-189	-213	-	-
Top 5 importers' share of U.S. soybean export sales	33%	70%	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 8/21/2025	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	2,034	1,666	22	3,358
Philippines	1,155	1,291	-11	2,473
Japan	866	844	3	2,045
China	0	139	-100	1,137
Korea	866	944	-8	1,674
Taiwan	489	451	8	935
Thailand	299	298	0	667
Nigeria	717	198	261	629
Indonesia	509	436	17	518
Colombia	359	208	73	489
Top 10 importers	7,293	6,475	13	13,926
Total U.S. wheat export sales	12,105	9,871	23	19,135
% of YTD current month's export projection	51%	44%	-	-
Change from prior week	580	532	-	-
Top 10 importers' share of U.S. wheat export sales	60%	66%	-	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.

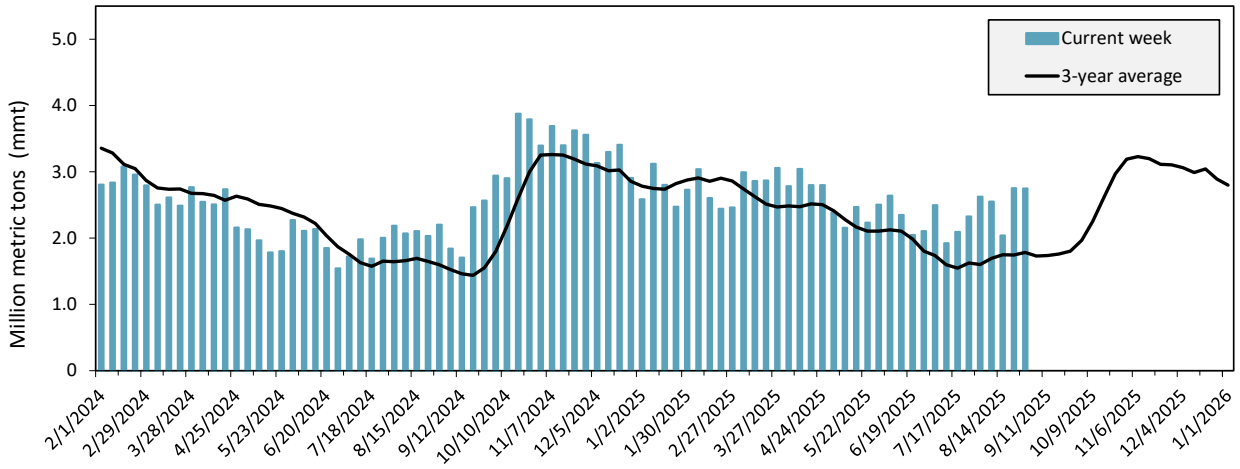
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 08/28/2025	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	306	257	119	16,002	11,642	137	259	449	13,987
	Soybeans	0	0	n/a	1,966	2,669	74	n/a	n/a	10,445
	Wheat	288	558	52	7,489	7,504	100	94	111	11,453
	All grain	594	814	73	25,573	22,901	112	132	156	37,186
Mississippi Gulf	Corn	765	645	119	24,469	18,108	135	95	130	27,407
	Soybeans	316	244	129	12,944	13,185	98	131	102	29,741
	Wheat	233	138	169	2,863	3,474	82	145	137	4,523
	All grain	1,314	1,028	128	40,315	34,827	116	109	121	61,789
Texas Gulf	Corn	37	21	176	367	369	99	259	246	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	175	227	77	3,165	1,173	270	291	323	1,940
	All grain	274	248	110	4,115	4,149	99	156	191	6,965
Interior	Corn	299	415	72	9,685	9,180	106	125	182	13,463
	Soybeans	154	147	105	4,582	4,745	97	117	148	8,059
	Wheat	88	96	92	2,151	2,054	105	106	125	2,989
	All grain	546	658	83	16,751	16,130	104	120	160	24,791
Great Lakes	Corn	0	0	n/a	64	0	n/a	n/a	429	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	18	0	n/a	183	298	61	47	68	653
	All grain	18	0	n/a	248	316	78	86	109	1,060
Atlantic	Corn	0	0	n/a	242	213	114	-	978	410
	Soybeans	3	2	151	495	440	113	723	72	1,272
	Wheat	1	2	65	52	65	81	20	26	73
	All grain	4	4	113	789	717	110	145	128	1,754
All Regions	Corn	1,407	1,339	105	50,828	39,512	129	127	180	56,109
	Soybeans	473	393	120	20,196	21,110	96	116	98	50,865
	Wheat	803	1,020	79	15,904	14,567	109	120	135	21,631
	All grain	2,750	2,752	100	87,894	79,093	111	120	142	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.

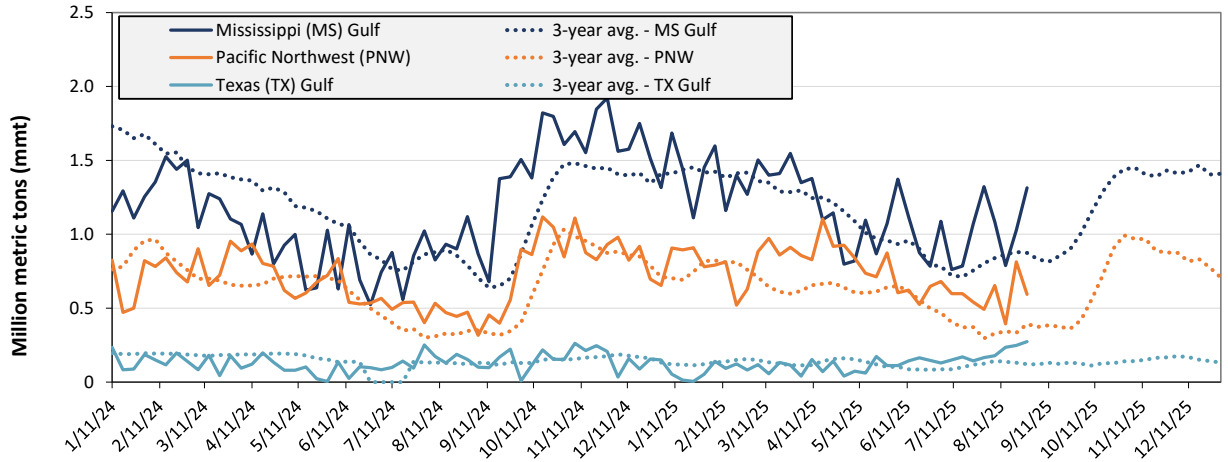
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Aug. 28: 2.7 mmt of grain inspected, unchanged from the previous week, up 22 percent from the same week last year, and up 54 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 08/28/25 inspections (mmt):
MS Gulf: 1.31
PNW: 0.59
TX Gulf: 0.27

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 28	up 10	up 24	down 27
Last year (same 7 days)	up 7	up 85	up 15	up 35
3-year average (4-week moving average)	up 50	up 124	up 59	up 51

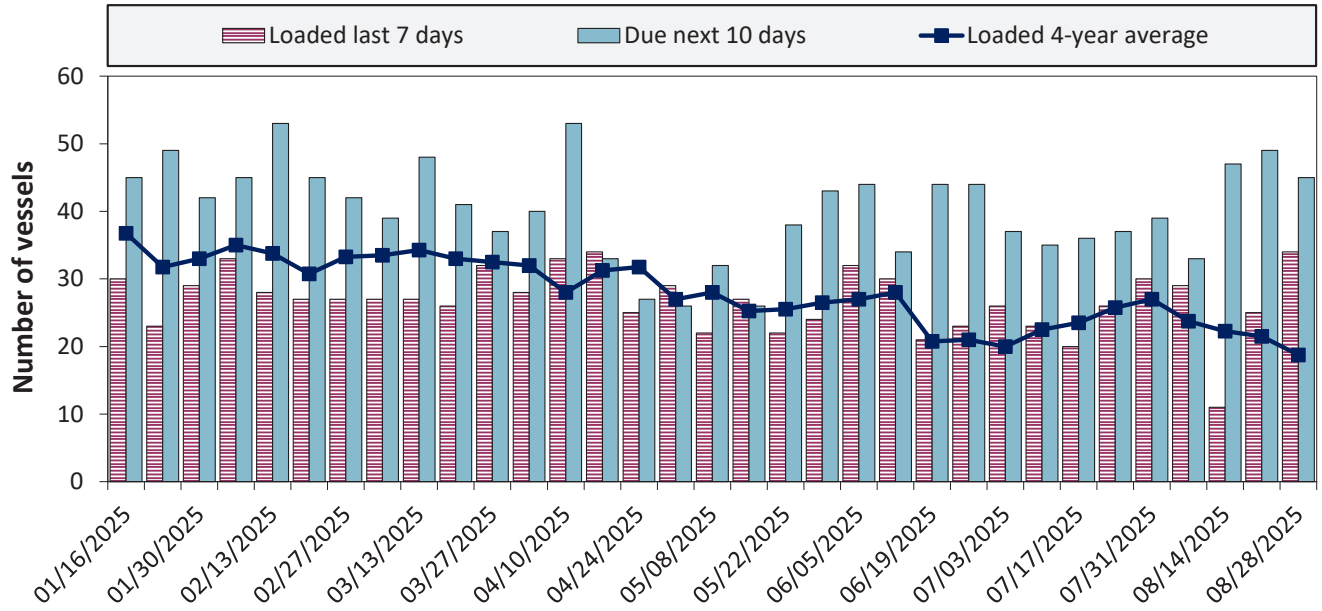
Source: USDA, Federal Grain Inspection Service.

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

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
8/28/2025	28	34	45	9
8/21/2025	20	25	49	8
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.

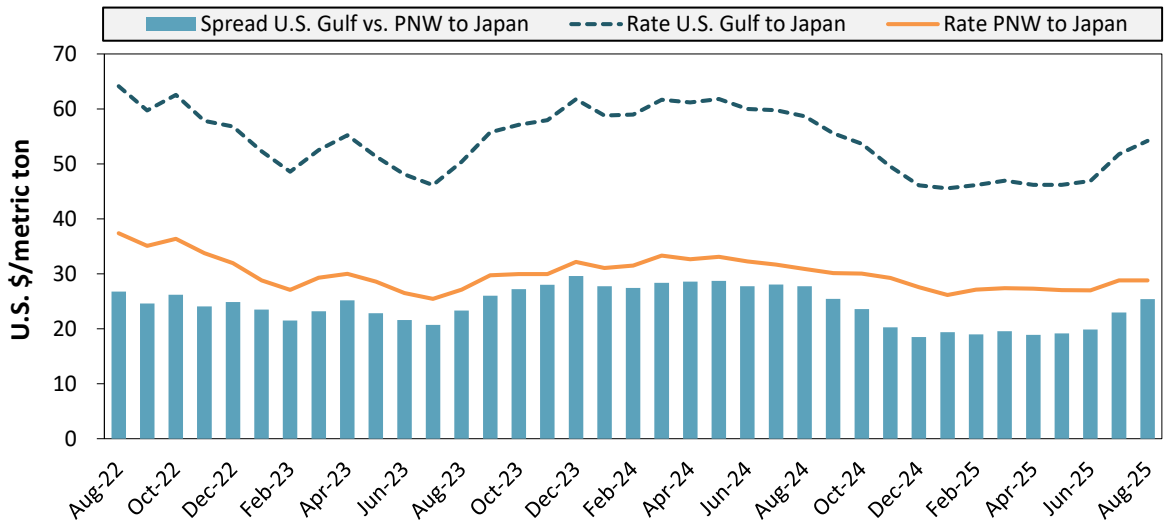
Figure 19. U.S. Gulf vessel loading activity



Week ending 08/28/25, number of vessels	Loaded	Due
Change from last year	36%	-4%
Change from 4-year average	81%	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



Ocean rates	U.S. Gulf	PNW	Spread
August 2025	$54.19	$28.81	$25.38
Change from August 2024	-8%	-7%	-6%
Change from 4-year average	-15%	-17%	-11%

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

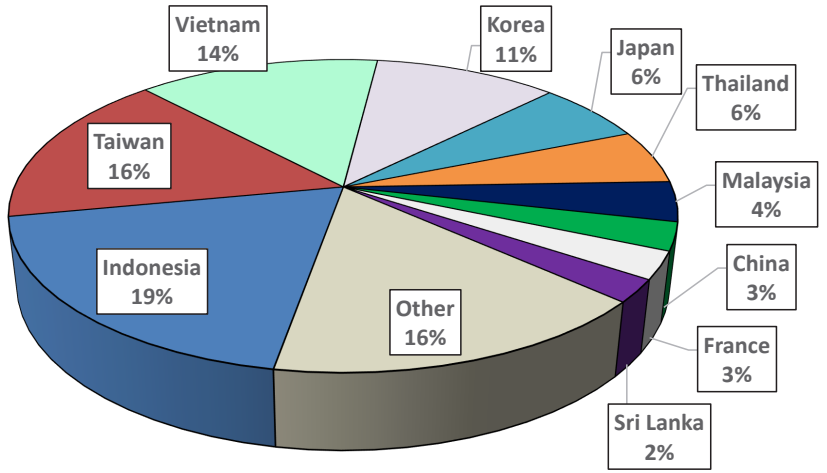
Table 20. Ocean freight rates for selected shipments, week ending 8/30/2025

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	Aug 28, 2025	Oct 1/10, 2025	46,000	48.00
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	Jul 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	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.

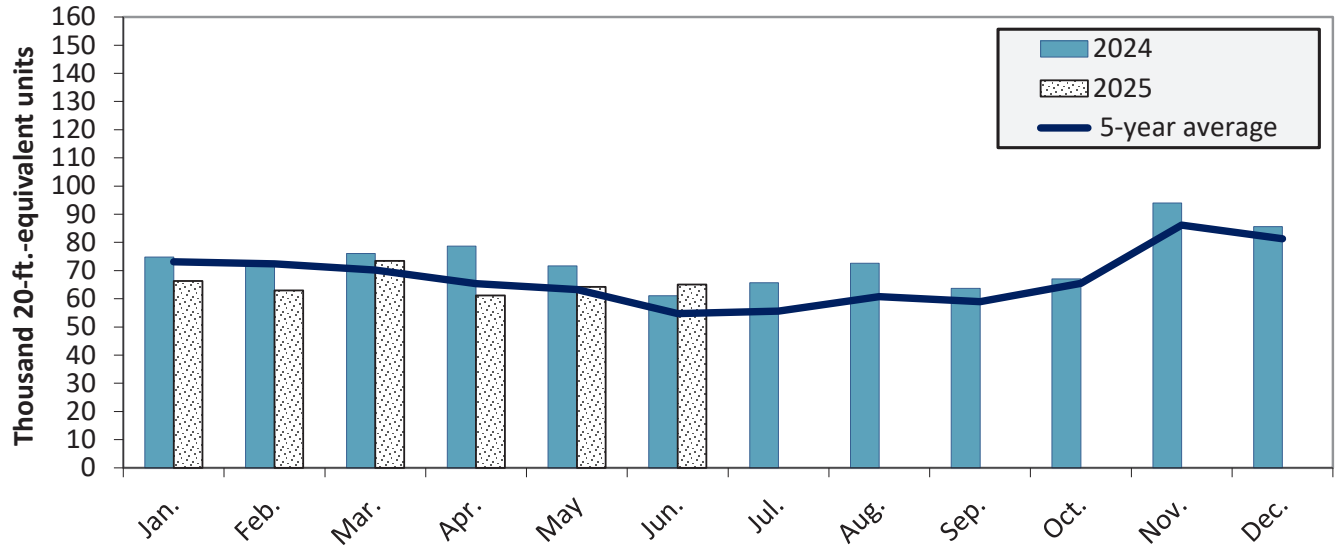
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Title	Name	Email	Phone
Coordinators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Maria Williams	maria.williams@usda.gov	(202) 690-4430
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Grain Transportation Indicators	Surajudeen (Deen) Olowolayemo	surajudeen.olowolayemo@usda.gov	(202) 720-0119
Rail Transportation	Jesse Gastelle	jesse.gastelle@usda.gov	(202) 690-1144
	Peter Caffarelli	petera.caffarelli@usda.gov	(202) 690-3244
	Austin Hunt	austin.hunt@usda.gov	(540) 681-2596
Barge Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Edmund Outlaw	edmund.outlaw@usda.gov	(301) 448-0578
Truck Transportation	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
Grain Exports	Kranti Mulik	kranti.mulik@usda.gov	(202) 756-2577
	Bernadette Winston	bernadette.winston@usda.gov	(202) 690-0487
Ocean Transportation	Surajudeen (Deen) Olowolayemo (Freight rates and vessels)	surajudeen.olowolayemo@usda.gov	(202) 720-0119
	Jesse Gastelle (Container movements)	jesse.gastelle@usda.gov	(202) 690-1144
Editor	Maria Williams	maria.williams@usda.gov	(202) 690-4430
Visual Information Specialists	Jessica Ladd	jessica.ladd@usda.gov	n/a
	Sharon C. Williams	sharonc.williams@usda.gov	(202) 720-2848

Subscription Information: Please sign up to receive regular email announcements of the latest GTR issue by **entering your email address** and selecting your preference to receive Transportation Research and Analysis. For any other information, you may contact us at **GTRContactUs@usda.gov**.

Preferred citation: U.S. Department of Agriculture, Agricultural Marketing Service. *Grain Transportation Report*. September 4, 2025.
Web: **http://dx.doi.org/10.9752/TS056.09-04-2025**

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***.

Photo Credit: Adobe Stock (unless otherwise noted by photo)