



Grain Transportation Report

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White House Announces Emergency Tax Relief on Diesel Fuel. On October 5, the U.S. President signed an [executive order](#) providing temporary tax deferral and penalty relief on the use of red-dyed diesel in highway vehicles, through the end of the year. Red-dyed diesel, which is normally restricted to off-road farm equipment, is exempt from the Federal tax of 24.4 cents a gallon that applies to on-road diesel fuel.

In a [statement](#), USDA's Secretary observed the action is "expected to represent approximately \$640 million in combined Federal and State savings across about 224.6 million harvested acres."

In recent weeks (both before and since the executive order), over a dozen States have moved to waive or ease State-level restrictions on dyed diesel for on-road use ([Grain Transportation Report \(GTR\), October 1, 2026, fourth highlight](#)).

For the week ending October 5, the [U.S. average diesel fuel price](#) was \$6.20 per gallon. The price was down 33 cents per gallon from the all-time high set 2 weeks ago (\$6.53 per gallon) and up \$2.49 per gallon from the same week last year.

Weskan and K&O Approach Settlement in Rate Reasonableness Case. On August 21, Weskan Grain, LLC, (Weskan) filed a rate reasonableness [complaint](#) against the Kansas and Oklahoma Railroad (K&O) at the Surface Transportation Board (STB) ([GTR, August 27, 2026, second highlight](#)). The complaint challenged K&O's rates for 50-car manifest blocks moving westward from

Weskan's Scott City East facility (in Scott City, KS) to the firm's Stockton grain elevator (near Sheridan Lake, CO).

On September 25, the parties jointly [informed STB](#) that they have agreed, in principle, to settlement terms that would dismiss Weskan's rate complaint, and they asked STB to place the proceeding in abeyance for 60 days to allow for finalization of the settlement terms. On September 28, STB approved this request.

The same parties are also engaged in a related interchange commitment dispute. For additional background on this case, see [GTR, April 30, 2026](#).

Maersk Completes First U.S. 100-Percent Ethanol Bunkering. On September 28, A.P. Moller-Maersk (Maersk) [announced](#) the successful bunkering of *Tangier Maersk*—a dual-fuel alcohol-enabled container vessel—using 100-percent U.S.-produced corn ethanol, at the Port of Houston.

Ocean carriers are testing ethanol as an alternative to methanol to add fuel flexibility: while their methanol-capable fleet has grown, supplies remain limited of methanol that complies with greenhouse-gas-emission standards. In September, the National Laboratory of the Rockies (in [Evaluation of Ethanol Use in Marine Shipping](#)) affirmed ethanol's viability as a vessel fuel substitute for methanol and named ethanol's advantages, including higher energy content, over methanol. The report also confirmed that large dual-fuel methanol engines can operate on ethanol with little or no modification.

According to the report, 112-120 methanol-capable vessels are currently in operation, including 38 new deliveries in 2026 and 300-350 on order. If U.S. ethanol bunkering infrastructure develops, these emerging vessels could be a significant source of demand for shipments of U.S. ethanol and corn.

CHS Breaks Ground on New Soybean Crush Facility in Wisconsin. Yesterday, CHS Inc. held a [ceremonial groundbreaking](#) for a new soybean crush facility near Evansville, WI.

Slated for completion in fall 2028, the new facility is expected to crush 80 million bushels of soybeans annually, resulting in the production of 1 billion pounds of soybean oil and 2 million tons of soybean meal.

The soybean oil, destined for the renewable fuels market, can be processed by CHS's refinery in Mankato, MN. The soybean meal will serve local/regional livestock feed markets. In August 2026, Wisconsin had [1.3 million milk cows](#)—the second-largest total of all the States.

The Evansville facility will be served by Union Pacific Railroad (UP). Once open, the new CHS facility will likely compete for soybeans with ALCIVIA's Evansville shuttle-loading elevator, also served by UP.

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 October 1, [unshipped balances](#) of corn, soybeans, and wheat for marketing year (MY) 2026/27 totaled 34.28 million metric tons (mmt), down 4 percent from last week and up 23 percent from the same time last year.

Net [corn export sales](#) for MY 2026/27 were 0.77 mmt, up 44 percent from last week. Net [soybean export sales](#) were 0.55 mmt, down 47 percent from last week. Net [wheat export sales](#) were 0.45 mmt, up 56 percent from last week.

Rail

U.S. Class I railroads originated 29,862 [grain carloads](#) during the week ending September 26. This was an 8-percent increase from the previous week, 13 percent more than last year, and 22 percent more than the 3-year average.

Average October [shuttle secondary railcar bids/offers](#) (per car) were \$350 above tariff for the week ending October 1. This was \$350 less than last week and \$194 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were \$13 above tariff. This was \$27 less than last week and unchanged from this week last year.

Barge

For the week ending October 3, [barged grain movements](#) totaled 332,100 tons. This was 16 percent fewer than the previous week and 9 percent more than the same week last year.

For the week ending October 3, 216 [barges moved down river](#), 24 fewer than the previous week. There were 730 grain barges unloaded in the New Orleans region, 23 percent fewer than the previous week.

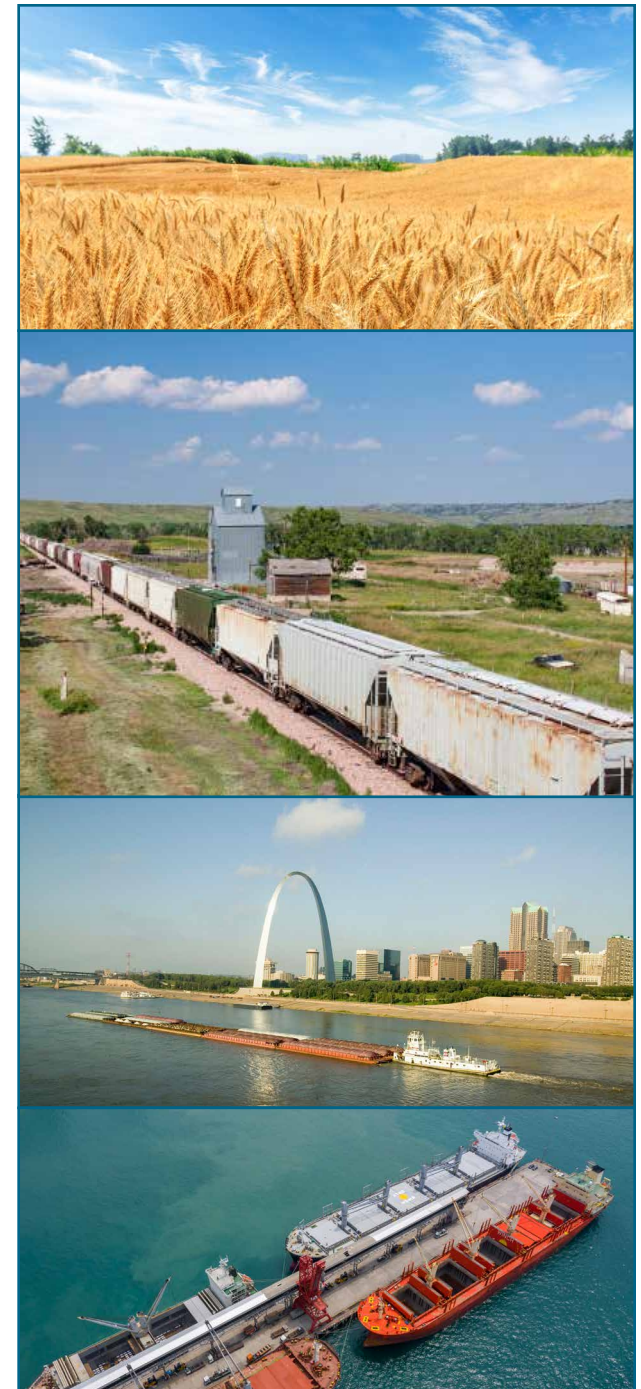
Ocean

For the week ending October 1, 39 [oceangoing grain vessels](#) were loaded in the Gulf—26 percent more than the same period last year. Within the next 10 days (starting October 2), 44 vessels were expected to be loaded—unchanged from the same period last year.

As of October 2, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$75.75, unchanged from the previous week. The rate from the Pacific Northwest to Japan was \$37.00 per mt, unchanged from the previous week.

Fuel

For the week ending October 5, the [U.S. average diesel fuel price](#) decreased 18.3 cents from the previous week to \$6.199 per gallon, 248.8 cents above the same week last year.



Grain Storage More Available Than Last Year, Though Tighter Than Average

Grain storage is an essential tool to efficiently market grain throughout the year. Abundant storage can also relieve strains on grain transportation and keep transportation costs down. By allowing shipments to be deferred until conditions improve, available storage can mitigate transportation bottlenecks, especially during harvest time.

Last year, grain storage was the tightest it had been in a decade following the largest corn crop on record ([Grain Transportation Report \(GTR\), November 27, 2025, first highlight](#)). This year's corn crop is projected to be smaller than last year's, reducing strain on the storage system compared to a year ago. However, storage is still likely to be tighter than the prior 5-year average, because of above-average corn production, potentially record soybean production, and above-average beginning grain stocks.¹ This year's storage availability (across all States combined) is the second lowest since 2018.

This article assesses the fall's grain storage availability by measuring fall grain supplies against storage capacity at the nationwide and State levels. The article concludes with a look at key rail and barge outlook indicators, as harvest progresses.

National View of Storage: Improved From Last Year, But Still Historically Tight

Combining three data points—[grain stocks](#) (as of September 1); new (post-September 1) [grain production](#); and [grain storage capacity](#)—indicates the degree to which the storage and handling system will face pressure this harvest. More pressure on storage means more pressure on the transportation system.

Stocks. According to USDA's National Agricultural Statistics Service (NASS), total grain stocks, as of September 1, 2026, were 4.49 billion bushels (bbu)—5 percent higher than last year and 15 percent above average.² Of total grain stocks on September 1, 2.93 bbu were held by off-farm commercial facilities (18 percent above average), and 1.56 bbu were held by farmers on farm (11 percent above average).

Production and Supplies. Adding to beginning stocks, NASS projects U.S. farmers to harvest 20.62 bbu of corn, soybeans, and grain sorghum.³ Though 5 percent below last year's record harvest, this estimate (if realized) would still be 4 percent above average. If the projected soybean crop (4.53 bbu) materializes, it will set

an all-time record. At 15.80 bbu, this year's corn crop is projected to be the second largest on record, only behind last year's 16.96 bbu crop.

Combined, total fall grain supplies—i.e., September 1 grain stocks, plus new production of corn, soybeans, and sorghum—are expected to tally 25.11 bbu, which (if realized) will be 3 percent below last year, but 6 percent above average.

Storage Capacity. NASS publishes annual data on grain storage capacity for both on-farm (e.g., bins, cribs, and sheds) and off-farm facilities (e.g., elevators, mills, and crushers). As of December 1, 2025, the United States had 25.49 bbu of total grain storage capacity, 11.87 bbu of off-farm storage capacity, and 13.62 bbu of on-farm storage capacity. Nationally, storage capacity increased by 56 million bushels (mbu) (less than 1 percent) from the prior year.

Despite rising grain production, storage capacity has grown little in recent years. From 2000 to 2019, grain storage capacity grew by an average of 297 mbu per year, closely mirroring increases in grain production over the same period. However, since 2020, growth in grain storage capacity has been negligible (rising only 338 mbu in 6 years).

¹ Throughout the article, unless otherwise specified, "average" refers to the prior 5-year average.

² In this calculation, "grain" includes barley; (old crop) corn; oats; (old crop) sorghum; (old crop) soybeans; and wheat.

³ This projection comes from NASS's September *Crop Production* report. NASS's October *Crop Production* report will be released tomorrow, October 9.

Storage Availability. Comparing fall grain supplies to total storage capacity suggests a storage surplus of 381 mbu across the United States, which is 874 mbu higher than last year, though 1.28 bbu lower than average. Last year's record corn crop resulted in a storage deficit of 493 mbu—the tightest storage since 2016. Though improved from last year, this year's storage surplus is the second smallest since 2018.

State-Level View: Storage Deficit Most Severe in Iowa

At the State level, storage availability is less of a concern than last year (especially in the western Corn Belt). However, a large projected harvest in Iowa is expected to tighten available capacity there.

Production—by State. Compared to last year, the largest year-to-year increase in fall grain production is projected for Ohio and Iowa—up 79 mbu and 69 mbu, respectively. Production is also expected to rise in the Mid-South (where harvest is mostly completed). Collectively, Kentucky, Arkansas, and Tennessee are projected to harvest 945 mbu of grain—up 144 mbu from last year.

The biggest year-to-year decline in grain production is projected in the western Corn Belt—where farmers harvested a massive crop last fall. Last fall, in Kansas, Nebraska, South Dakota, and North Dakota, farmers harvested

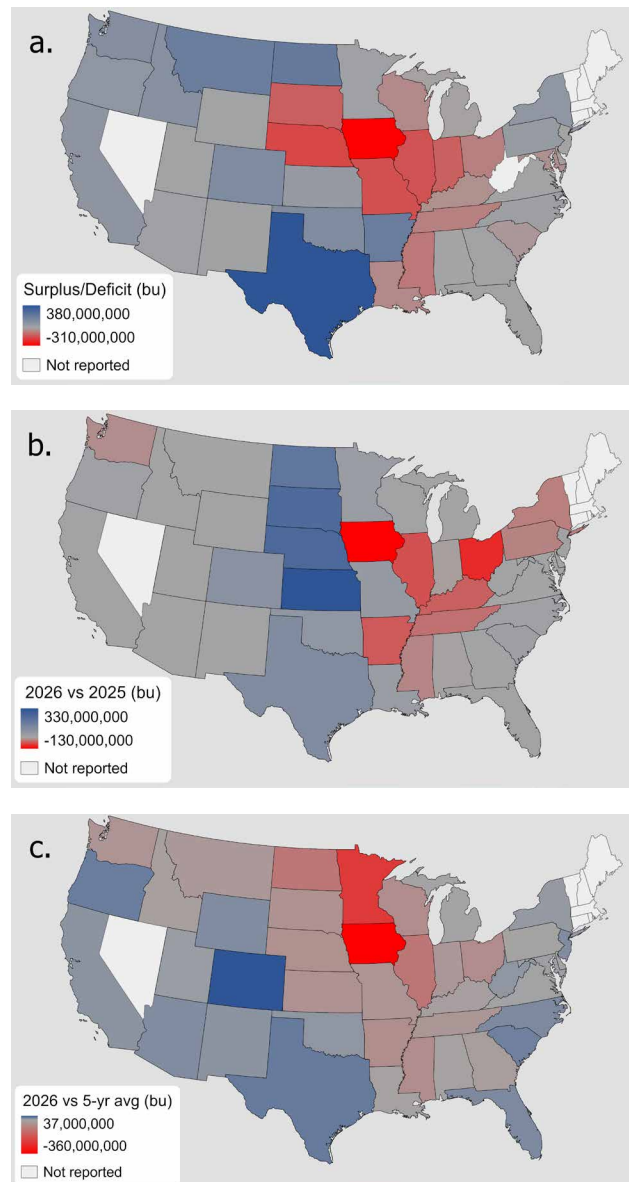
6.00 bbu of corn, soybeans, and sorghum. This year, these same States are projected to harvest 5.02 bbu of the same crops. Although that combined total is down 16 percent from 2025, these States, except Nebraska, are each projected to harvest an above-average crop. Nebraska's estimated harvest is 2.03 bbu—down 59 mbu from average.

Grain Storage Surplus and Deficit—by State. For insights across U.S. geography and across time, figure 1 shows three snapshots of storage availability by State: the estimated surplus (or deficit) for 2026; the change in that surplus (or deficit) from last year; and the change in that surplus (or deficit) from average.

The 2026 distribution of estimated surpluses and deficits (map *a* in fig. 1) reveals significant variation from State to State. In total, 18 States are projected to have storage deficits, and 6 are projected to have deficits in excess of 100 mbu. The largest-deficit States are Iowa (–313 mbu); Nebraska (–177 mbu); Missouri (–161 mbu); Illinois (–155 mbu); South Dakota (–130 mbu); and Indiana (–127 mbu).

As shown in [map b](#) in fig. 1, Nebraska's projected storage deficit—despite being the second largest among all States—is significantly improved from last year's deficit (424 mbu), which more than doubled this year's projection. The other western Corn Belt States are also projected to see more abundant storage compared to last year. Last year's

Figure 1. (a) Storage surplus/deficit for 2026, (b) compared to 2025, and (c) compared to prior 5-year average (in million bushels).



Source: USDA/Agricultural Marketing Service analysis of USDA/National Agricultural Statistics Service data.

storage deficit in the western Corn Belt could also have been a factor in elevating rail grain carloads during harvest.⁴

As figure 1's [map c](#) shows, 27 States are projected to be more storage constrained than average, and 4 are projected to be at least 100 mbu more constrained than average, as follows: Iowa (-357 mbu); Minnesota (-232 mbu); North Dakota (-102 mbu); and Illinois (-100 mbu). Given the storage tightness, these States will likely generate above-average transportation demand in the coming year.

In Iowa, prolonged rain has created harvest delays, despite USDA's current projection that the State will harvest an above-average crop that will generate a storage deficit. According to NASS's [Crop Progress report](#), as of October 4, just 7 percent of Iowa's corn has been harvested (compared to 20 percent, on average for the week), and just 5 percent of Iowa's soybeans have been harvested (compared to 38 percent on average). Without new crop soybeans, Iowa crush plants increased their basis bids significantly, and there are reports of rail shipments of soybeans into Iowa, in recent weeks ([GTR, October 1, 2026, first highlight](#)).

Transportation Outlook

As harvest progresses, railroad and barge service appears relatively favorable. However, shippers will likely face higher rates—mainly because of rising diesel costs.

Rail. Rail service this harvest season remains generally adequate, but continues to trail performance levels observed at this time last year. Over the past 4 weeks, average origin dwell times for grain trains on CSX Transportation, Norfolk Southern Railway, BNSF Railway, and Union Pacific Railroad have all exceeded those recorded during the same 4-week period last year. In addition, every railroad except Canadian Pacific Kansas City has reported lower average grain train speeds than last year ([GTR table 4a](#)).

Although these service metrics warrant monitoring, the most pressing issue for grain shippers is the notable increase in rail transportation costs—driven largely by higher fuel surcharges. In October, the weighted average fuel surcharge for Class I railroads is 59 cents per mile ([GTR fig. 9](#)). This amount represents an increase of 11 cents from last month and 40 cents from the same period last year.

Most Class I railroads base their fuel surcharge on the U.S. average diesel price from 2 months prior, such that September's record diesel prices will apply in November. November's fuel surcharges are expected to surpass the all-time record (61 cents per mile) set back in July ([GTR, July 2, 2026, first highlight](#)).

Barge. Barge conditions for the upcoming harvest appear more favorable than in recent years, largely owing to improved river levels along key stretches of the Mississippi River. At

St. Louis, MO, the river gauge has remained above 0 feet since mid-September and was 23 feet on October 7. Farther south, at Memphis, TN, the river level has been above 0 feet since late September and was 2 feet on October 7. These sustained, positive river levels support generally reliable navigation, while reducing the risk of the severe draft and tow-size restrictions that complicated prior harvest seasons ([GTR, March 16, 2023](#)).

Despite these positive operational conditions, barge freight costs have remained elevated for much of the year. Higher operating costs (driven in part by increased diesel prices)—along with a smaller covered hopper barge fleet and strong grain demand—have kept rates above historical norms. In the latest week, the St. Louis barge rate was \$28.85 per ton—53 percent above the same week last year ([GTR table 9](#)).

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⁴ For example, according to Surface Transportation Board [service data \(available on AgTransport\)](#)—from September through November 2025, compared to average: Kansas loaded/billed 6,900 more grain carloads (+25 percent); South Dakota, 3,500 more (+15 percent); and North Dakota, 1,500 more (+3 percent).

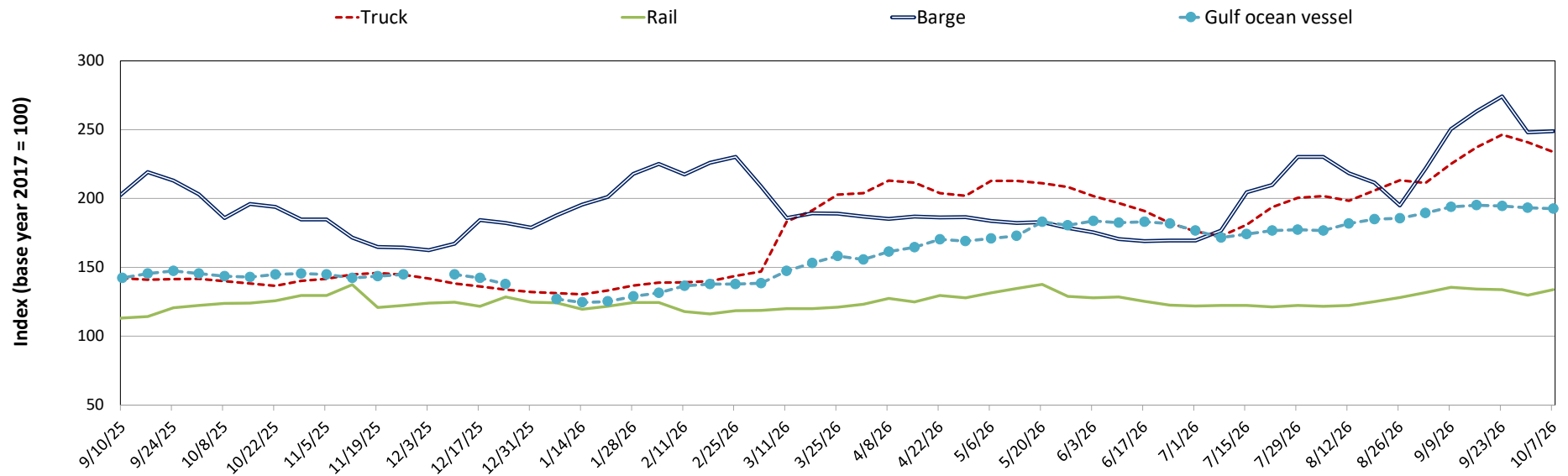
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
10/07/26	234	134	249	193	176
09/30/26	241	130	248	193	176
10/08/25	140	124	186	144	140

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.

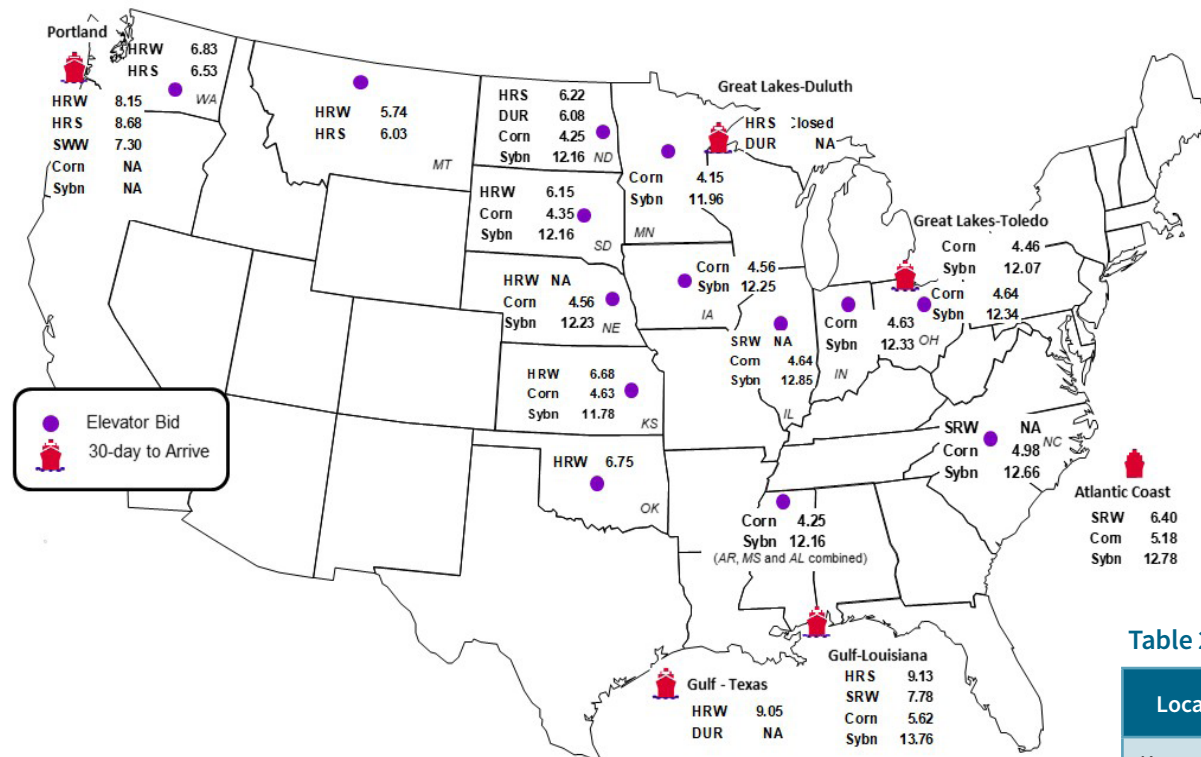
Figure 1. Grain transportation cost indicators as of week ending 10/07/26



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	10/2/2026	9/25/2026
Corn	IL-Gulf	-0.98	-0.97
Corn	NE-Gulf	-1.06	-1.10
Soybean	IA-Gulf	-1.51	-1.29
HRW	KS-Gulf	-2.37	-2.38
HRS	ND-Portland	-2.46	-2.47

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	10/02/2026	Week ago 09/25/2026	Year ago 10/03/2025
Kansas City	Wht	Dec	7.352	7.618	4.970
Minneapolis	Wht	Dec	6.980	7.135	5.598
Chicago	Wht	Dec	6.828	7.032	5.152
Chicago	Corn	Dec	4.978	5.282	4.190
Chicago	Sybn	Dec	12.782	13.190	10.180

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

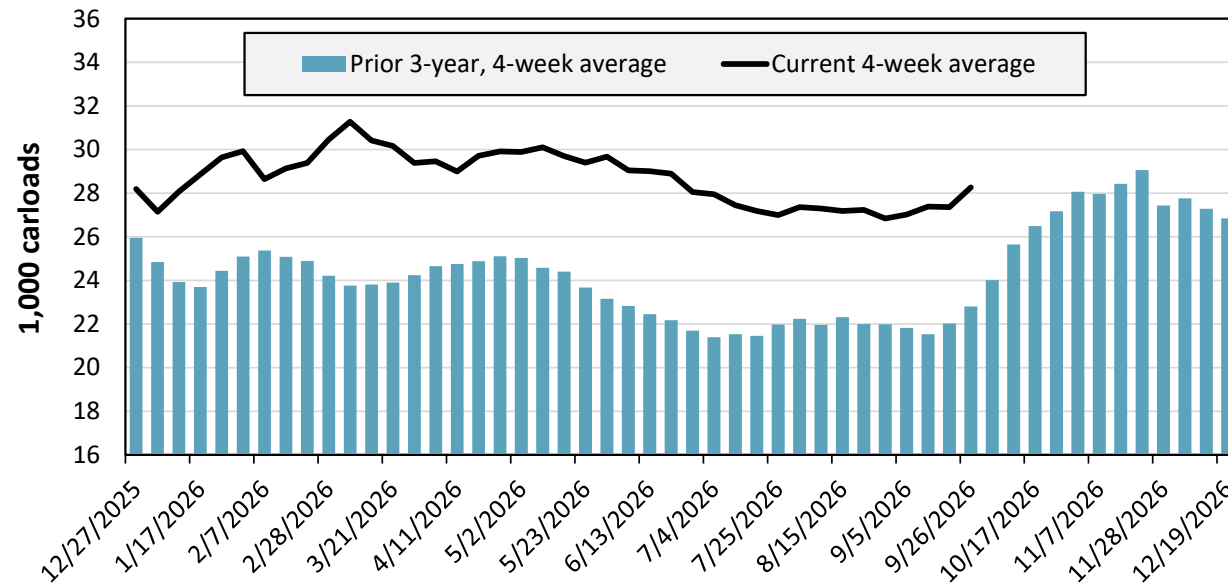
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 9/26/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,737	2,202	13,167	6,445	4,595	1,716	29,862
This week last year	1,527	1,931	13,544	5,607	2,834	1,041	26,484
2026 YTD	56,766	97,080	486,435	253,626	137,834	64,672	1,096,413
2025 YTD	59,301	103,804	432,237	224,706	108,988	53,305	982,341
2026 YTD as % of 2025 YTD	96	94	113	113	126	121	112
Last 4 weeks as % of 2025	108	118	106	110	124	156	112
Last 4 weeks as % of 3-yr. avg.	105	119	118	126	143	158	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 September 26, grain carloads were up 3 percent from the previous week, up 12 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: 9/25/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	31.9	26.2	22.9	22.9	10.9	24.1	23.2
	Average over last 4 weeks	42.4	30.0	21.9	23.6	8.3	25.6	25.3
	Average of same 4 weeks last year	19.4	27.9	11.3	17.5	8.8	28.5	18.9
Average grain unit train speeds (miles per hour)	This week	21.1	19.0	24.0	22.5	22.8	18.7	21.3
	Average over last 4 weeks	22.0	18.6	24.0	22.6	23.4	18.3	21.5
	Average of same 4 weeks last year	23.2	20.4	25.3	23.3	24.8	15.7	22.1

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

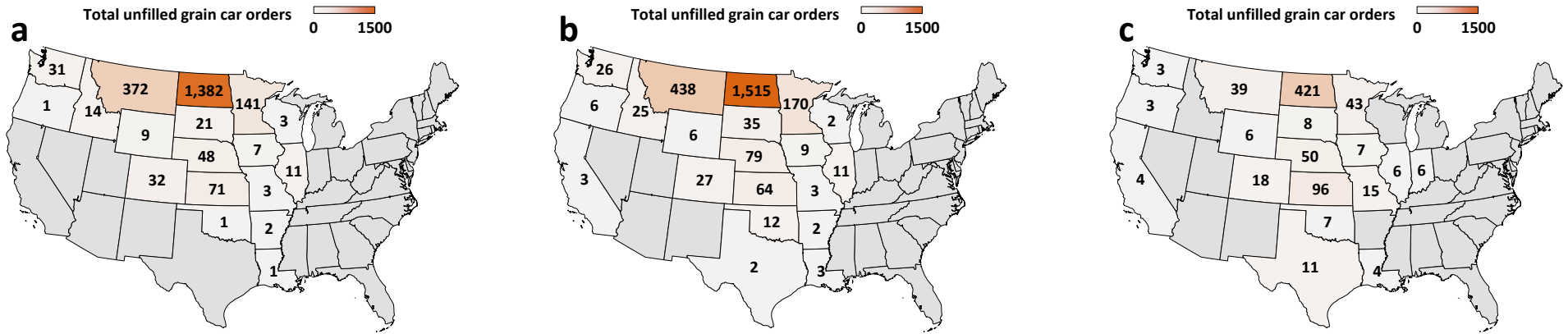
For the week ending: 9/25/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	21	28	280	54	4	180	566
	Average over last 4 weeks	44	22	361	56	4	161	648
	Average of same 4 weeks last year	10	5	260	68	5	271	618
Average number of loaded grain cars not moved in over 48 hours	This week	18	356	441	33	4	342	1,194
	Average over last 4 weeks	36	365	475	50	3	258	1,185
	Average of same 4 weeks last year	14	174	307	55	4	522	1,076
Average number of grain unit trains held	This week	0	0	5	3	0	4	12
	Average over last 4 weeks	0	0	4	5	0	6	14
	Average of same 4 weeks last year	0	0	2	3	0	7	11
Total unfilled manifest grain car orders	This week	0	5	954	82	0	1,159	2,200
	Average over last 4 weeks	0	2	1,003	115	0	1,342	2,461
	Average of same 4 weeks last year	9	0	239	110	0	425	783

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](#).

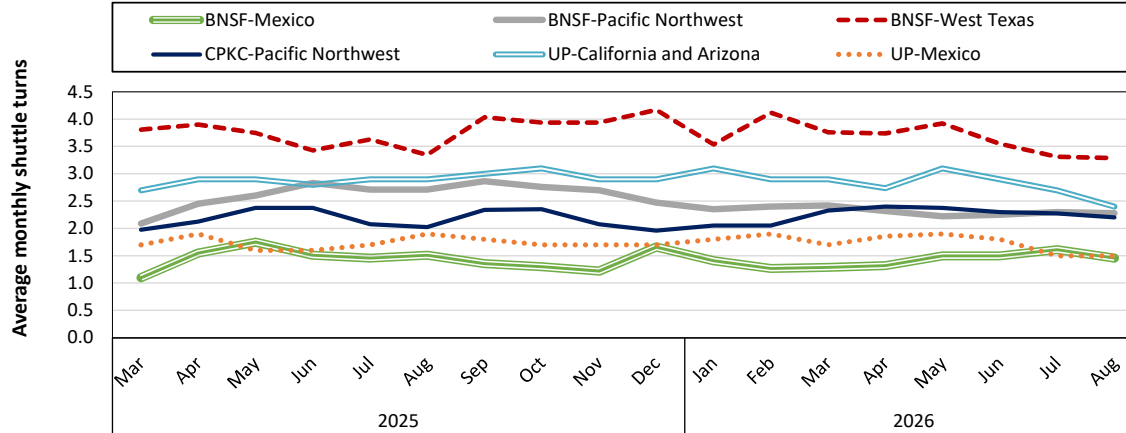
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 9/25/2026 (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

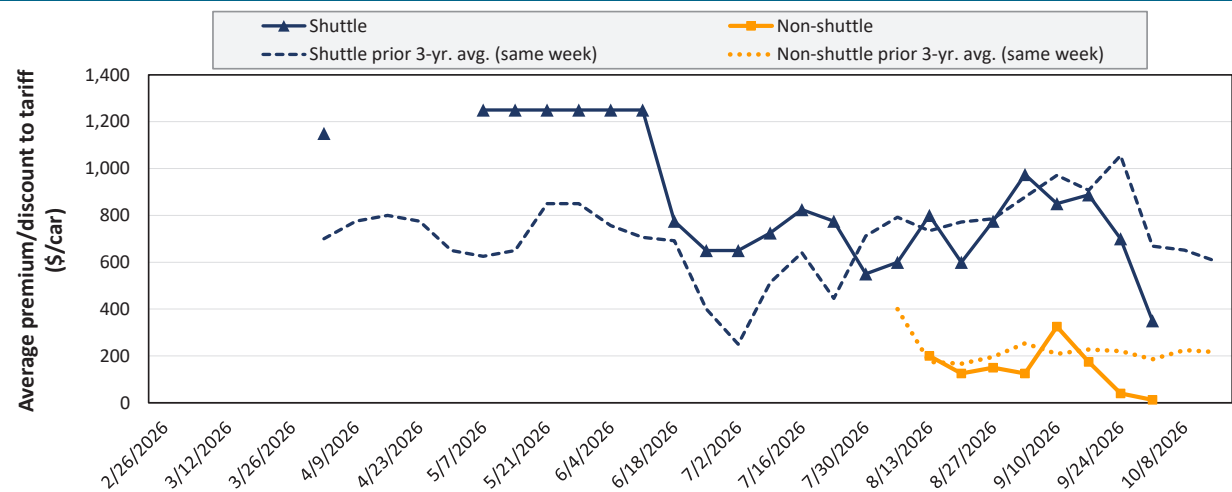


In August 2026, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.3 to the Pacific Northwest, and 3.3 to West Texas. CPKC's shuttle turns averaged 2.2 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.4 to California and Arizona, and they averaged 1.5 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.com/). BNSF = BNSF Railway; CPKC = Canadian Pacific Kansas City; UP = Union Pacific Railroad.
Source: Surface Transportation Board.

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

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



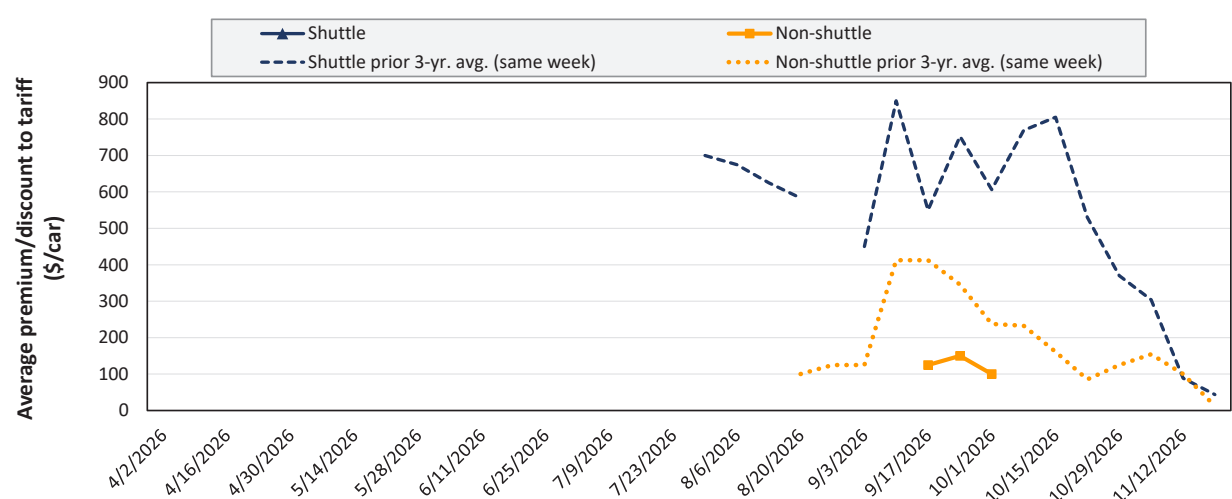
Average non-shuttle bids/offers fell \$27 this week, and are \$313 below the peak.

Average shuttle bids/offers fell \$350 this week and are \$900 below the peak.

10/1/2026	BNSF	UP
Non-Shuttle	\$0	\$25
Shuttle	\$575	\$125

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 November 2026



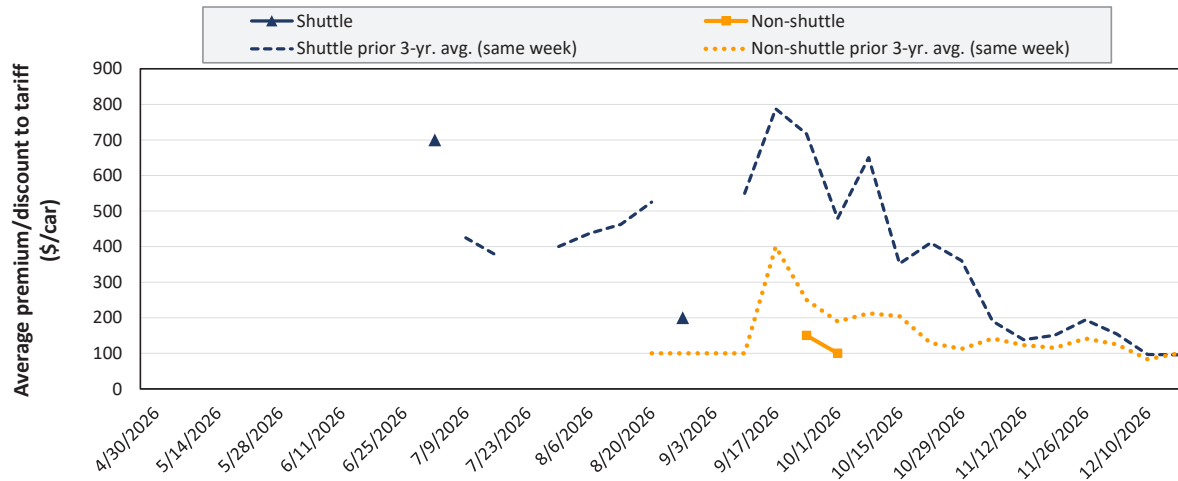
Average non-shuttle bids/offers fell \$50 this week, and are \$50 below the peak.

There were no shuttle bids/offers this week.

10/1/2026	BNSF	UP
Non-Shuttle	\$100	\$100
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.

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



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

There were no shuttle bids/offers this week.

10/1/2026	BNSF	UP
Non-Shuttle	\$100	\$100
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: 10/1/2026		Delivery period					
		Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27
Non-shuttle	BNSF	0	100	100	n/a	n/a	n/a
	Change from last week	-42	-50	-50	n/a	n/a	n/a
	Change from same week 2025	-25	-25	n/a	n/a	n/a	n/a
	UP	25	100	100	n/a	n/a	n/a
	Change from last week	-13	-50	-50	n/a	n/a	n/a
	Change from same week 2025	25	0	0	n/a	n/a	n/a
Shuttle	BNSF	575	n/a	n/a	n/a	n/a	n/a
	Change from last week	-125	n/a	n/a	n/a	n/a	n/a
	Change from same week 2025	-58	n/a	n/a	n/a	n/a	n/a
	UP	125	n/a	n/a	n/a	n/a	n/a
	Change from last week	-575	n/a	n/a	n/a	n/a	n/a
	Change from same week 2025	-329	n/a	n/a	n/a	n/a	n/a
	CPKC	n/a	n/a	500	n/a	n/a	n/a
	Change from last week	n/a	n/a	0	n/a	n/a	n/a
	Change from same week 2025	n/a	n/a	500	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, October 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	\$555	\$6,539	\$1.77	\$64.94	9.9
	BNSF	Williston, ND	Superior, WI	Shuttle	\$4,466	\$278	\$4,744	\$1.28	\$47.11	9.0
	CPKC	Westby, MT	St. Louis, MO	Unit	\$6,013	\$1,278	\$7,291	\$1.97	\$72.41	16.0
	UP	Yuma, AZ	Houston, TX	Manifest	\$6,025	\$934	\$6,959	\$1.88	\$69.10	7.4
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	\$5,029	\$322	\$5,351	\$1.45	\$53.14	9.8
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	\$6,365	\$774	\$7,139	\$1.93	\$70.89	12.2
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	\$3,040	\$149	\$3,189	\$0.86	\$31.67	10.2
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	\$5,882	\$805	\$6,687	\$1.81	\$66.41	13.6
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	\$5,963	\$681	\$6,644	\$1.80	\$65.98	11.4
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	\$5,562	\$565	\$6,127	\$1.66	\$60.85	11.1
	CPKC	Minot, ND	Kalama, WA	Unit	\$5,448	\$1,132	\$6,580	\$1.78	\$65.34	14.6
	CPKC	Nekoma, ND	Chicago, IL	Manifest	\$5,255	\$680	\$5,935	\$1.60	\$58.94	12.1
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	\$3,400	\$293	\$3,693	\$1.00	\$36.67	6.6
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	\$3,400	\$359	\$3,759	\$1.02	\$37.33	2.8
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	\$5,800	\$967	\$6,767	\$1.83	\$67.20	13.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	\$5,600	\$683	\$6,283	\$1.70	\$62.39	7.6
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,200	\$495	\$4,695	\$1.27	\$46.62	9.5
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	\$4,000	\$511	\$4,511	\$1.22	\$44.80	10.7
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	\$3,500	\$421	\$3,921	\$1.06	\$38.94	9.3
	BNSF	Wichita, KS	Chicago, IL	DET	\$3,700	\$287	\$3,987	\$1.08	\$39.59	5.9
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	\$3,900	\$458	\$4,358	\$1.18	\$43.28	9.9
	UP	Byers, CO	Houston, TX	Shuttle	\$4,525	\$791	\$5,316	\$1.44	\$52.79	8.3
	UP	Goodland, KS	Kansas City, MO	Manifest	\$5,067	\$296	\$5,363	\$1.45	\$53.26	4.9
	UP	Medford, OK	Houston, TX	Shuttle	\$3,775	\$390	\$4,165	\$1.13	\$41.36	5.1
	UP	Salina, KS	Houston, TX	Shuttle	\$4,025	\$520	\$4,545	\$1.23	\$45.14	6.3
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	\$4,964	\$347	\$5,311	\$1.44	\$52.74	9.1
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	\$4,589	\$439	\$5,028	\$1.36	\$49.93	11.4
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	\$2,082	\$216	\$2,298	\$0.62	\$22.82	11.3
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	\$9,039	\$349	\$9,388	\$2.54	\$93.22	9.0
	CSX	Chicago, IL	Albany, NY	Unit	\$8,104	\$349	\$8,453	\$2.28	\$83.94	10.1
	CSX	Chicago, IL	Buffalo, NY	Manifest	\$6,391	\$223	\$6,614	\$1.79	\$65.68	8.4
	CSX	Chicago, IL	Indiantown, FL	Manifest	\$9,261	\$595	\$9,856	\$2.66	\$97.87	11.6

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, October 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	\$5,800	\$501	\$6,301	\$1.59	\$62.57	10.4
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	\$5,670	\$861	\$6,531	\$1.65	\$64.86	15.8
	BNSF	Edison, NE	Hanford, CA	Railroad	\$5,660	\$830	\$6,490	\$1.64	\$64.45	15.1
	BNSF	Edison, NE	Hereford, TX	Railroad	\$4,700	\$354	\$5,054	\$1.27	\$50.19	10.5
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	\$5,550	\$951	\$6,501	\$1.64	\$64.56	17.7
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	\$4,620	\$423	\$5,043	\$1.27	\$50.08	7.0
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	\$4,460	\$346	\$4,806	\$1.21	\$47.72	10.8
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	\$4,200	\$532	\$4,732	\$1.19	\$46.99	15.6
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	\$5,630	\$749	\$6,379	\$1.61	\$63.35	14.5
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	\$5,630	\$849	\$6,479	\$1.63	\$64.34	15.8
	CN	Gibson City, IL	Reserve, LA	Private	\$2,631	\$718	\$3,349	\$0.84	\$33.25	13.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$3,011	\$718	\$3,729	\$0.94	\$37.03	11.7
	CPKC	Delhi, LA	Morton, MS	Railroad	\$1,412	\$100	\$1,512	\$0.38	\$15.01	8.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,272	\$1,302	\$6,574	\$1.66	\$65.28	18.3
	CPKC	Glenwood, MN	Boardman, OR	Railroad	\$5,513	\$1,253	\$6,766	\$1.71	\$67.19	12.7
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	\$6,600	\$304	\$6,904	\$1.74	\$68.56	10.6
	CSX	Marysville, OH	Rose Hill, NC	Railroad	\$6,766	\$336	\$7,102	\$1.79	\$70.52	11.3
	CSX	Olney, IL	Fairmount, GA	Railroad	\$5,191	\$215	\$5,406	\$1.36	\$53.68	10.5
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	\$4,160	\$470	\$4,630	\$1.17	\$45.98	11.2
	UP	Frankfort, KS	Calipatria, CA	Railroad	\$6,080	\$1,069	\$7,149	\$1.80	\$70.99	12.2
Soybeans	UP	Mead, NE	Keyes, CA	Railroad	\$6,240	\$1,181	\$7,421	\$1.87	\$73.70	12.6
	UP	Nebraska City, NE	Amarillo, TX	Railroad	\$5,080	\$486	\$5,566	\$1.40	\$55.27	9.3
	UP	Sloan, IA	Burley, ID	Railroad	\$5,760	\$800	\$6,560	\$1.65	\$65.14	10.7
	UP	Sterling, IL	Nashville, AR	Railroad	\$4,300	\$492	\$4,792	\$1.21	\$47.58	11.1
	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	\$6,255	\$786	\$7,041	\$1.90	\$69.92	12.0
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	\$5,185	\$748	\$5,933	\$1.60	\$58.92	10.9
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	\$6,205	\$761	\$6,966	\$1.88	\$69.18	11.8
	BNSF	Casselton, ND	St. Louis, MO	Railroad	\$3,400	\$400	\$3,800	\$1.03	\$37.73	9.0
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	\$6,305	\$842	\$7,147	\$1.93	\$70.97	12.6
	CN	Gibson City, IL	Reserve, LA	Private	\$2,631	\$718	\$3,349	\$0.91	\$33.25	13.2
	CN	Gibson City, IL	Reserve, LA	Railroad	\$3,011	\$718	\$3,729	\$1.01	\$37.03	11.7
	CPKC	Enderlin, ND	Kalama, WA	Railroad	\$5,985	\$1,302	\$7,287	\$1.97	\$72.36	15.8
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	\$3,726	\$984	\$4,710	\$1.27	\$46.77	20.3
	CSX	Casey, IL	Mobile, AL	Private	\$3,775	\$335	\$4,110	\$1.11	\$40.81	12.7
	CSX	Marion, OH	Chesapeake, VA	Private	\$3,327	\$327	\$3,654	\$0.99	\$36.28	13.7
	UP	Canton, KS	Houston, TX	Railroad	\$3,875	\$508	\$4,383	\$1.18	\$43.52	12.5
	UP	Cozad, NE	Kalama, WA	Railroad	\$5,365	\$1,062	\$6,427	\$1.74	\$63.82	13.6
	UP	Cozad, NE	Houston, TX	Railroad	\$4,235	\$733	\$4,968	\$1.34	\$49.34	13.8
	UP	Sloan, IA	Ama, LA	Railroad	\$4,315	\$837	\$5,152	\$1.39	\$51.16	14.6

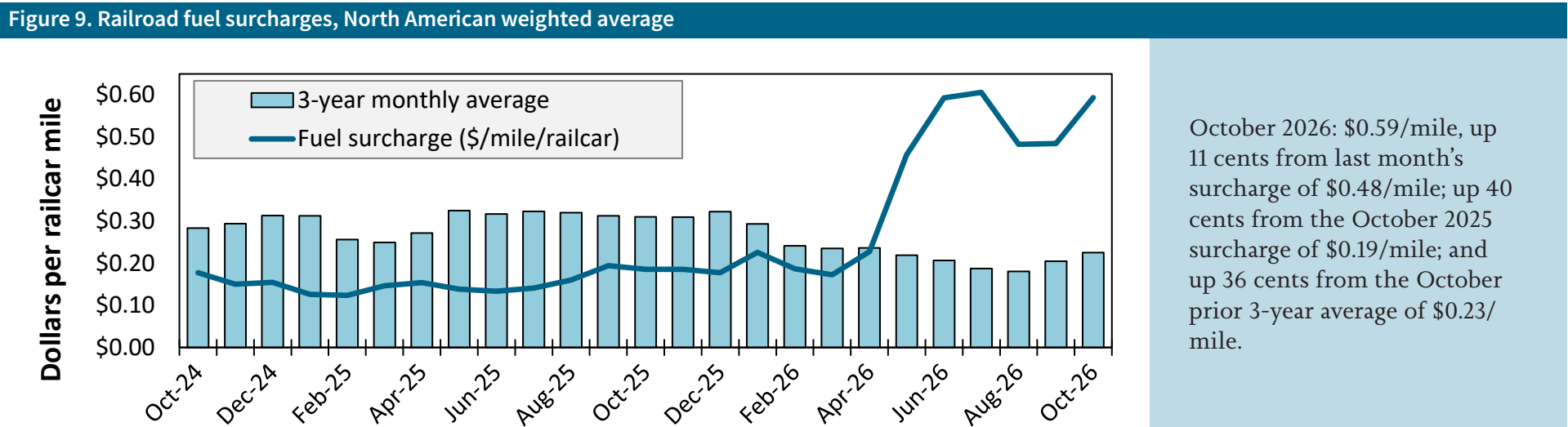
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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, October 2026

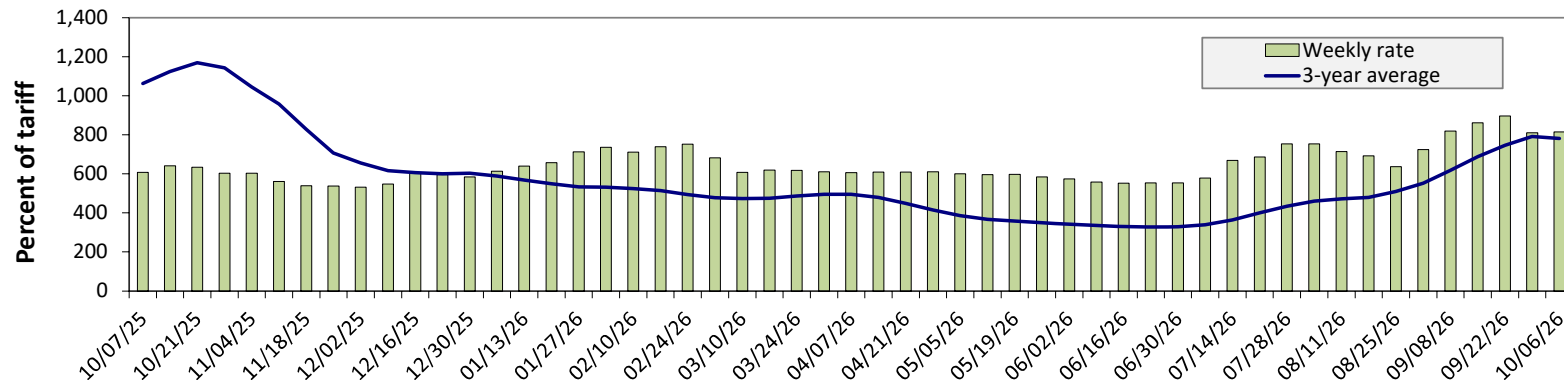
Commodity	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Adair, IL	El Paso, TX	Shuttle	\$4,560	\$577	\$5,137	\$1.28	\$50.56	7.7
	BNSF	Superior, NE	El Paso, TX	Shuttle	\$4,740	\$454	\$5,194	\$1.30	\$51.12	10.0
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$1,079	\$6,159	\$1.54	\$60.62	9.8
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	\$5,750	\$1,194	\$6,944	\$1.74	\$68.34	13.2
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,031	\$6,036	\$1.51	\$59.41	9.6
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	\$5,225	\$1,094	\$6,319	\$1.58	\$62.19	10.4
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	\$4,760	\$868	\$5,628	\$1.41	\$55.39	13.6
Soybeans	UP	Sterling, IL	Eagle Pass, TX	Shuttle	\$4,880	\$902	\$5,782	\$1.45	\$56.91	13.5
	BNSF	Brunswick, MO	El Paso, TX	Shuttle	\$3,585	\$490	\$4,075	\$1.09	\$40.11	-8.1
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	\$3,585	\$488	\$4,073	\$1.09	\$40.09	-8.1
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	\$5,080	\$1,079	\$6,159	\$1.65	\$60.62	9.8
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,031	\$6,036	\$1.62	\$59.41	9.6
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	\$5,175	\$826	\$6,001	\$1.61	\$59.06	12.1
	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	\$5,260	\$866	\$6,126	\$1.64	\$60.29	12.3
Wheat	BNSF	FT Worth, TX	El Paso, TX	DET	\$3,100	\$353	\$3,453	\$0.92	\$33.98	12.1
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	\$2,600	\$353	\$2,953	\$0.79	\$29.06	2.6
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	\$5,005	\$1,031	\$6,036	\$1.62	\$59.41	9.6
	UP	Great Bend, KS	Laredo, TX	Shuttle	\$4,325	\$620	\$4,945	\$1.32	\$48.67	6.9
	UP	Wichita, KS	Laredo, TX	Shuttle	\$4,065	\$546	\$4,611	\$1.24	\$45.38	6.5

Note: After December 2021, U.S. railroads stopped reporting "through rates" from the U.S. origin to the Mexican destination. Thus, the table shows "Rule 11 rates," which cover only the portion of the shipment from a U.S. origin to locations on the U.S.-Mexico border. The Rule 11 rates apply only to shipments that continue into Mexico, and the total cost of the shipment would include a separate rate obtained from a Mexican railroad. The rates apply to jumbo covered hopper ("C114") cars. The "shuttle" train type applies to qualified shipments (typically, 110 cars) that meet railroad efficiency requirements. The "non-shuttle" train type applies to 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).



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 October 6: there is no change from the previous week; 34 percent higher than last year; and 4 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	10/6/2026	832	839	814	723	839	621
	9/29/2026	838	846	811	759	925	721
\$/ton	10/6/2026	51.50	44.63	37.77	28.85	39.35	19.50
	9/29/2026	51.87	45.01	37.63	30.28	43.38	22.64
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	28	35	34	53	67	44
	3-year avg.	11	7	4	-6	5	-22
Rate	November	793	779	720	661	714	570
	January	n/a	n/a	634	547	596	504

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](#).

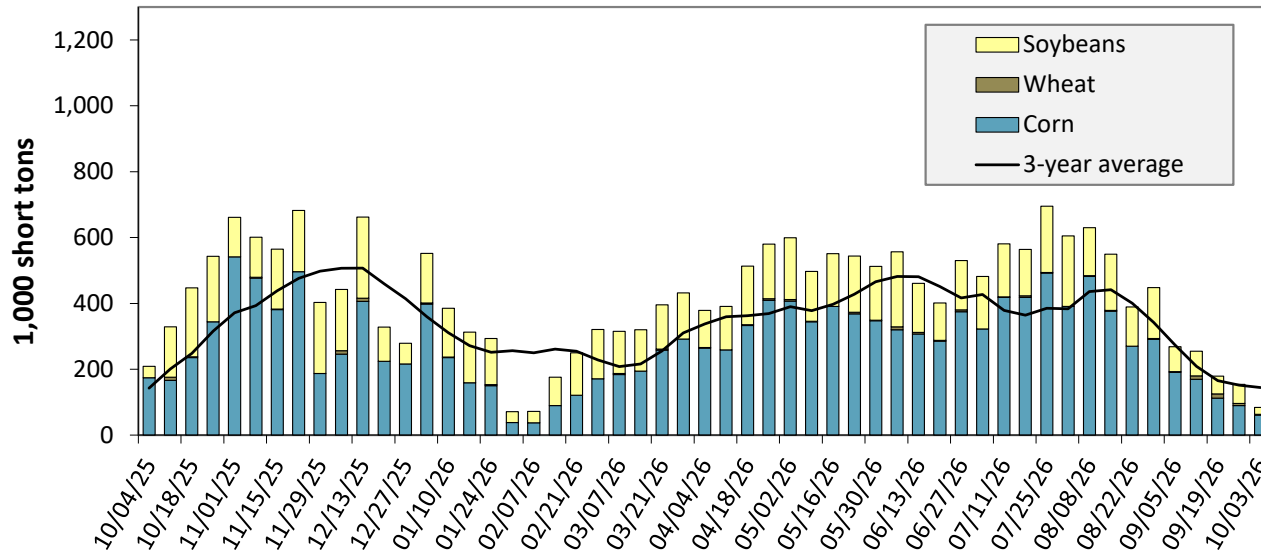
Source: USDA, Agricultural Marketing Service.

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 October 3: 60 percent lower than last year and 42 percent lower than the 3-year average.

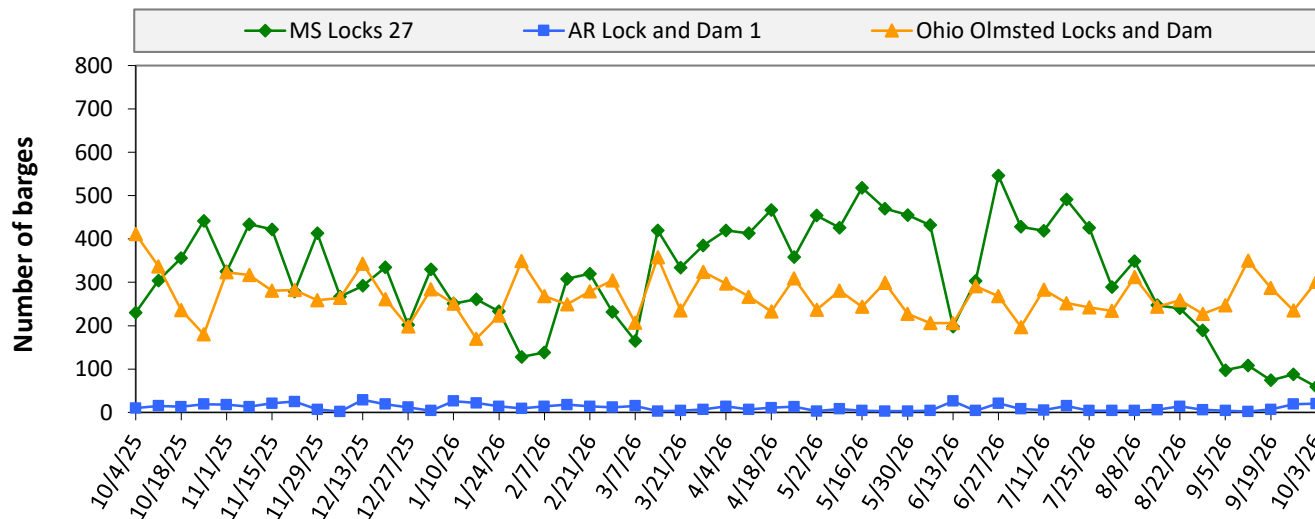
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 10/03/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	11	0	0	0	11
Mississippi River (Winfield, MO (L25))	40	2	8	2	51
Mississippi River (Alton, IL (L26))	70	2	21	2	94
Mississippi River (Granite City, IL (L27))	61	2	21	2	84
Illinois River (La Grange)	22	0	11	0	34
Ohio River (Olmsted)	89	0	137	0	226
Arkansas River (L1)	0	0	22	0	22
Weekly total - 2026	150	2	179	2	332
Weekly total - 2025	203	13	90	0	305
2026 YTD	13,272	720	7,735	87	21,815
2025 YTD	14,798	1,083	7,913	144	23,938
2026 as % of 2025 YTD	90	66	98	61	91
Last 4 weeks as % of 2025	102	53	227	149	130
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.

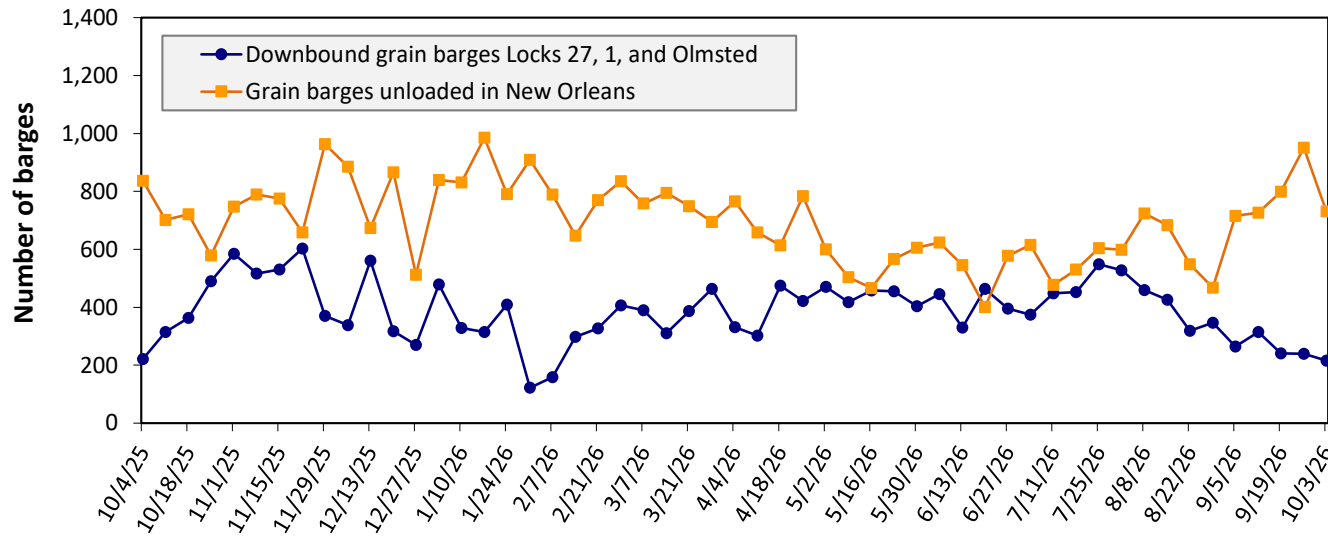
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending October 3: 380 barges transited the locks, 38 barges more than the previous week, and 22 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 October 3: 216 barges moved down river, 24 fewer than the previous week; 730 grain barges unloaded in the New Orleans Region, 23 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	
		October 2026	September 2026	October 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	\$25.23	\$24.73	\$22.88	10.3	12.7
	Central Ferry, WA/Almota, WA	\$24.27	\$23.77	\$21.95	10.6	12.9
	Lyons Ferry, WA	\$23.18	\$22.68	\$20.90	10.9	13.2
	Windust, WA/Lower Monumental, WA	\$22.07	\$21.57	\$19.83	11.3	13.4
	Sheffler, WA	\$22.04	\$21.54	\$19.80	11.3	13.5
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	\$20.76	\$20.26	\$18.56	11.8	13.9
	Port Kelly, WA/Wallula, WA	\$20.52	\$20.02	\$18.33	11.9	13.9
	Umatilla, OR	\$20.42	\$19.92	\$18.23	12.0	14.0
	Boardman, OR/Hogue Warner, OR	\$20.14	\$19.64	\$17.96	12.1	14.1
	Arlington, OR/Roosevelt, WA	\$19.97	\$19.47	\$17.80	12.2	14.2
	Biggs, OR	\$18.54	\$18.04	\$16.42	12.9	14.7
	The Dalles, OR	\$17.36	\$16.86	\$15.28	13.6	15.3

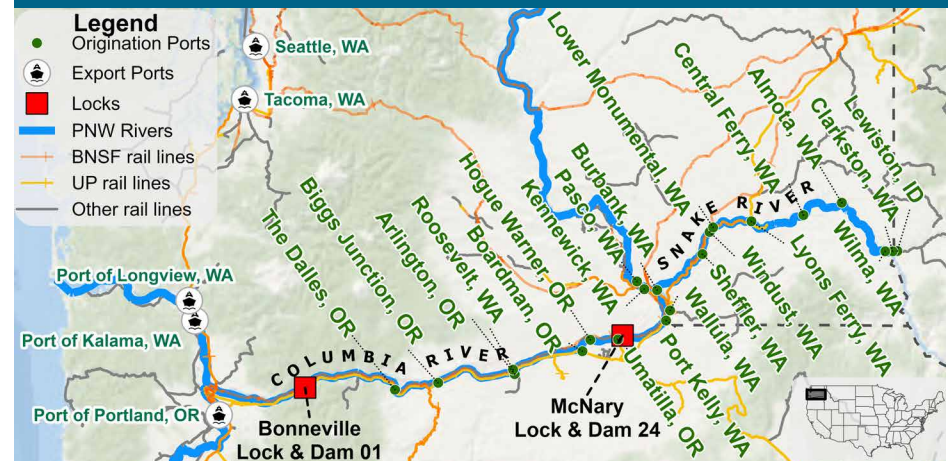
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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

September, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	296	0	296
Columbia River (Bonneville Lock and Dam (L1))	371	0	371
Monthly total 2025 (L1)	365	0	365
Monthly total 2025(L24)	328	0	328
2026 YTD(L1)	2,705	0	2,705
2026 YTD(L24)	2,193	0	2,193
2025 YTD(L1)	2,994	0	2,994
2025 YTD(L24)	2,625	0	2,625

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.

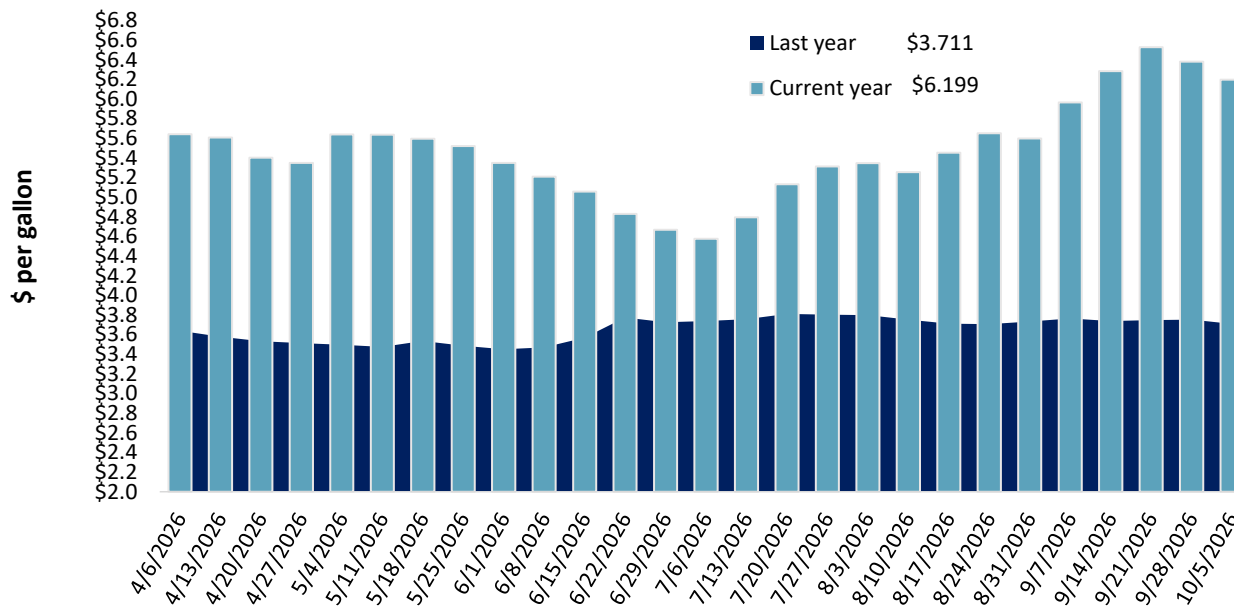
Table 13. Retail on-highway diesel prices, week ending 10/05/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.951	-0.186	2.216
	New England	6.476	-0.034	2.518
	Central Atlantic	6.485	-0.046	2.599
	Lower Atlantic	5.699	-0.254	2.043
II	Midwest	6.286	-0.240	2.616
III	Gulf Coast	5.819	-0.136	2.455
IV	Rocky Mountain	6.267	-0.140	2.596
V	West Coast	7.229	-0.128	2.730
	West Coast less California	6.490	-0.153	2.400
	California	8.082	-0.099	3.111
Total	United States	6.199	-0.183	2.488

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 October 5, the U.S. average diesel fuel price decreased 18.3 cents from the previous week to \$6.199 per gallon, 248.8 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: 10/01/2026	569	414	1,009	1,205	89	3,288	12,142	18,850	34,280
	This week year ago	1,796	575	1,053	1,382	30	4,835	22,592	526	27,954
	Last 4 wks. as % of same period in prior marketing year	29	71	93	84	247	65	60	197	97
Current shipped (cumulative) export sales	Current MYTD	1,614	1,068	1,966	1,966	208	6,822	7,402	3,935	18,158
	Prior MYTD	4,054	1,439	2,559	1,769	187	10,009	6,819	15,052	31,879
	Current MYTD as % of prior MYTD	40	74	77	111	111	68	109	26	57
	Total 2025/26	8,243	3,202	6,078	5,207	622	23,419	86,014	41,007	150,440
	Total 2024/25	5,377	3,095	6,560	5,730	335	21,097	69,081	50,106	140,284

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: 10/01/2026	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	7,682	9,926	-23	23,186
Japan	3,107	3,769	-18	13,485
Colombia	1,925	2,152	-11	7,639
Korea	1,313	2,119	-38	5,826
Spain	266	917	-71	2,730
Top 5 importers	14,026	17,966	-22	50,136
Total U.S. corn export sales	19,543	29,411	-34	69,791
% of YTD current month's export projection	23%	34%	-	-
Change from prior week	769	2,260	-	-
Top 5 importers' share of U.S. corn export sales	72%	61%	-	72%
USDA forecast September 2026	83,189	87,000	-4	-
Corn use for ethanol USDA forecast, September 2026	142,240	140,970	1	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2025/26 (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: 10/01/2026	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2024-26 (1,000 mt)
	YTD MY 2026/27	YTD MY 2025/26		
China	11,142	0	NA	19,737
Mexico	1,945	2,470	-21	4,939
Egypt	630	0	NA	3,402
Indonesia	476	494	-4	2,205
Japan	565	594	-5	2,128
Top 5 importers	14,758	3,558	315	32,410
Total U.S. soybean export sales	22,785	12,664	80	45,208
% of YTD current month's export projection	50%	31%	-	-
Change from prior week	549	919	-	-
Top 5 importers' share of U.S. soybean export sales	65%	28%	-	72%
USDA forecast, September 2026	45,858	41,368	11	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2025/26 (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: 10/01/2026	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	2,323	2,401	-3	3,744
Philippines	1,535	1,612	-5	2,677
Japan	1,162	1,116	4	2,050
Korea	974	1,067	-9	1,888
Taiwan	480	575	-17	1,005
Nigeria	200	1,068	-81	878
China	NA	0	NA	863
Indonesia	303	794	-62	746
Thailand	321	385	-16	690
Vietnam	323	417	-23	581
Top 10 importers	7,621	9,436	-19	15,121
Total U.S. wheat export sales	10,109	14,844	-32	21,015
% of YTD current month's export projection	48%	60%	-	-
Change from prior week	452	888	-	-
Top 10 importers' share of U.S. wheat export sales	75%	64%	-	72%
USDA forecast, September 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)

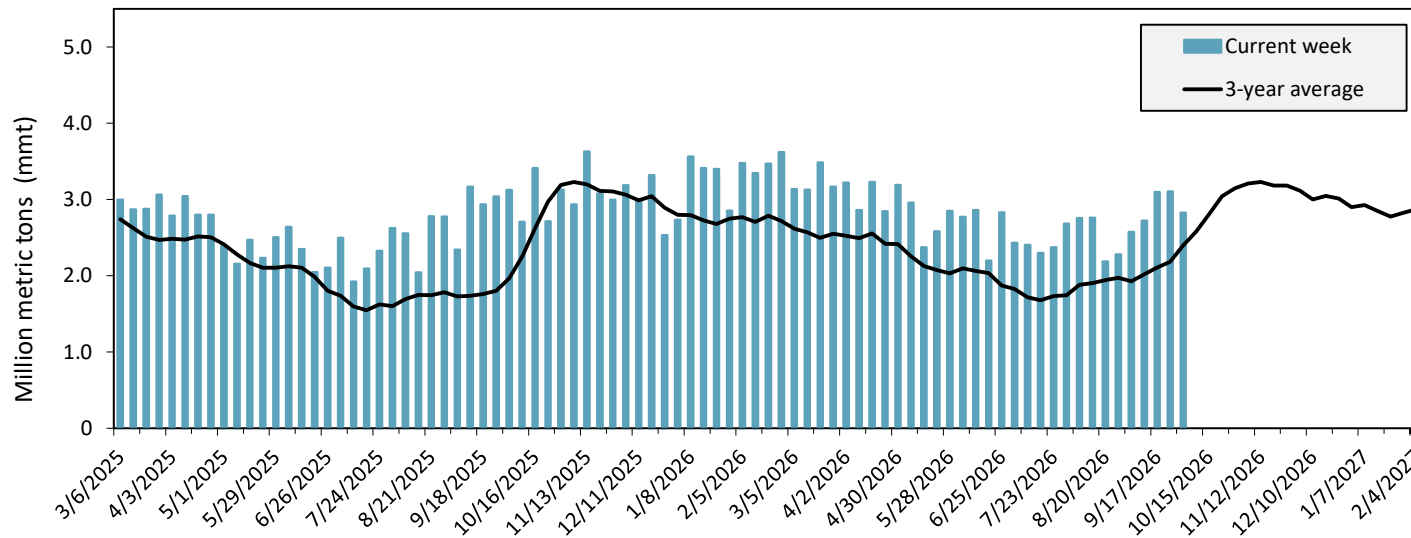
Port regions	Commodity	For the week ending 10/01/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	494	612	81	20,616	17,204	120	225	519	24,214
	Soybeans	0	0	n/a	4,181	1,966	213	0	0	2,957
	Wheat	248	144	172	8,163	9,511	86	51	61	12,271
	All grain	741	756	98	33,274	28,796	116	114	153	39,721
Mississippi Gulf	Corn	372	581	64	28,644	28,688	100	70	97	37,115
	Soybeans	1,077	1,099	98	17,869	15,508	115	156	172	23,350
	Wheat	30	18	171	2,331	3,258	72	41	38	3,980
	All grain	1,482	1,698	87	48,970	47,494	103	101	124	64,484
Texas Gulf	Corn	0	33	0	1,380	510	271	125	216	590
	Soybeans	0	0	n/a	100	106	94	n/a	0	1,431
	Wheat	0	98	0	2,186	3,839	57	27	52	4,690
	All grain	0	131	0	7,244	5,032	144	37	54	7,774
Interior	Corn	440	329	134	12,603	11,384	111	104	128	15,546
	Soybeans	61	57	107	5,243	5,217	100	59	71	7,713
	Wheat	25	77	32	2,412	2,515	96	70	89	3,104
	All grain	540	495	109	20,660	19,513	106	91	112	26,888
Great Lakes	Corn	0	23	0	381	147	260	28	83	414
	Soybeans	0	0	n/a	66	0	n/a	n/a	317	63
	Wheat	0	0	n/a	262	225	117	67	33	434
	All grain	0	23	0	709	371	191	46	55	911
Atlantic	Corn	62	3	n/a	1,465	391	375	104	252	607
	Soybeans	0	0	n/a	617	549	112	2	6	1,085
	Wheat	0	0	n/a	22	75	29	13	24	81
	All grain	63	3	n/a	2,103	1,015	207	71	170	1,773
All Regions	Corn	1,368	1,581	87	65,089	58,323	112	104	154	78,486
	Soybeans	1,138	1,156	98	28,586	23,449	122	136	142	36,852
	Wheat	302	337	90	15,375	19,423	79	46	59	24,560
	All grain	2,826	3,106	91	113,470	102,325	111	96	123	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.

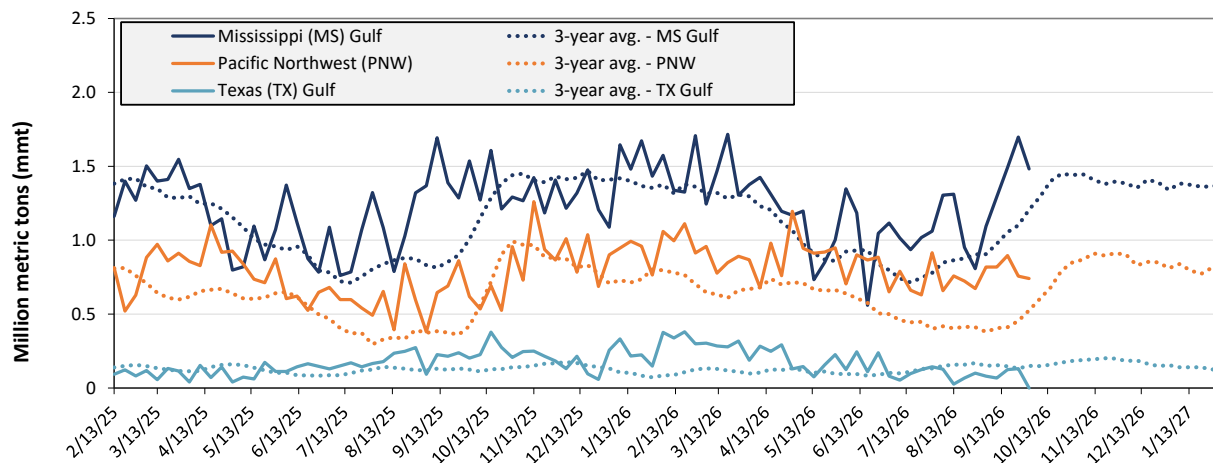
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending October 01: 2.8 mmt of grain inspected, down 9 percent from the previous week, down 15 percent from the same week last year, and up 18 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 10/01/26 inspections (mmt):

MS Gulf: 1.48

PNW: 0.74

TX Gulf: 0

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 13	down 100	down 19	down 2
Last year (same 7 days)	down 9	down 100	down 19	down 2
3-year average (4-week moving average)	up 23	down 100	up 9	up 41

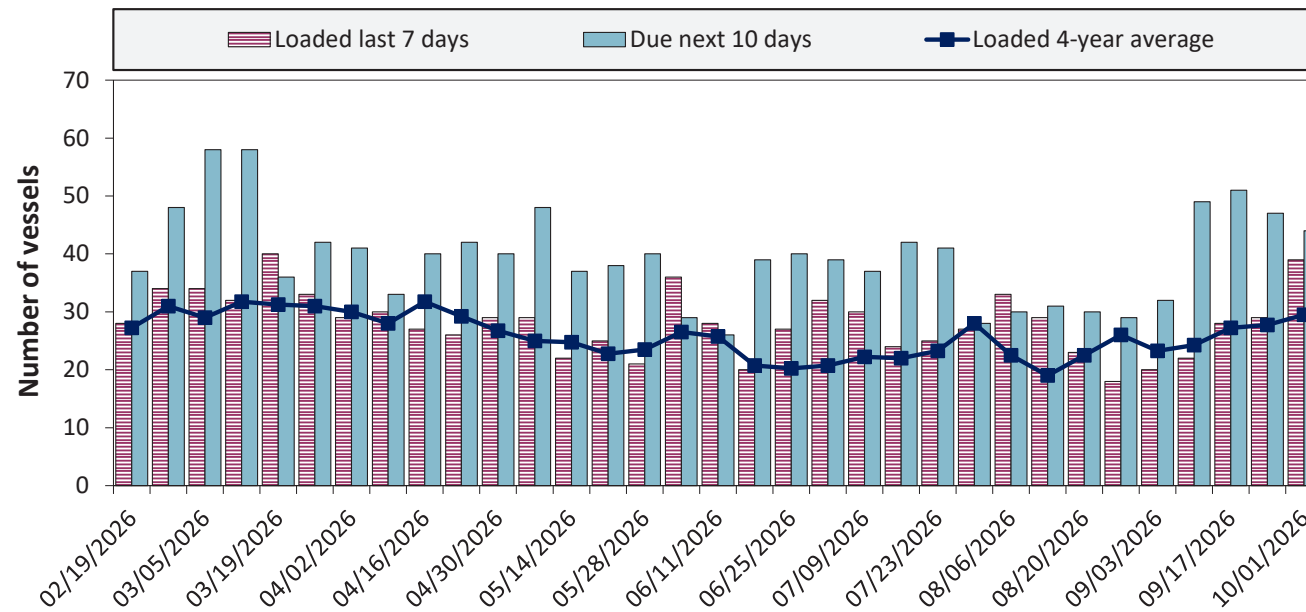
Table 19. Weekly port region grain ocean vessel activity (number of vessels)

Date	Gulf			Pacific Northwest
	In port	Loaded 7-days	Due next 10-days	In port
10/1/2026	23	39	44	16
9/24/2026	25	29	47	11
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

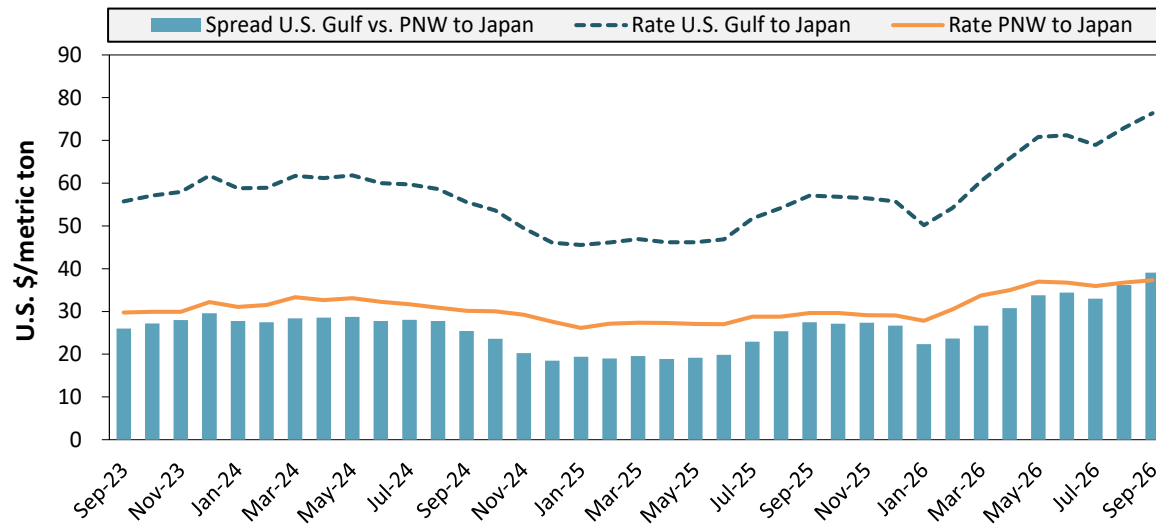


Week ending 10/01/26, number of vessels	Loaded	Due
Change from last year	26%	0%
Change from 4-year average	32%	-9%

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
September 2026	\$76.38	\$37.31	\$39.07
Change from September 2025	34%	26%	42%
Change from 4-year average	34%	20%	51%

Table 20. Ocean freight rates for selected shipments, week ending 10/03/2026

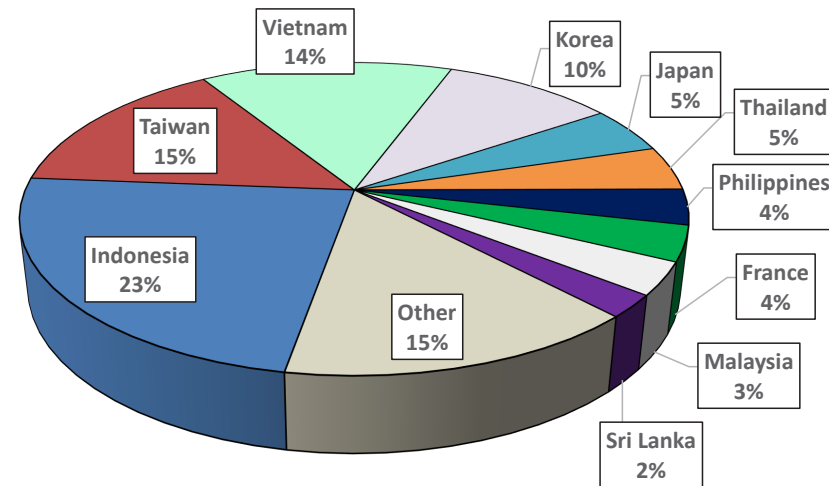
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	N. China	Heavy grain	Oct 1, 2026	Oct 22/31, 2026	68,000	77.00
U.S. Gulf	N. China	Heavy grain	Sep 3, 2026	Sep 20/30, 2026	68,000	76.00
U.S. Gulf	N. China	Heavy grain	Aug 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
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	Jordan	Heavy grain	Jul 30, 2026	Aug 15/30, 2026	70,000	45.00
Brazil	Thailand	Heavy grain	Sep 17, 2026	Oct 14/19, 2026	63,000	54.50
River Plate	Indonesia	Heavy grain	Oct 2, 2026	Nov 1/6, 2026	65,000	56.90
River Plate	France	Heavy grain	Sep 17, 2026	Oct 1/11, 2026	50,000	44.00

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.

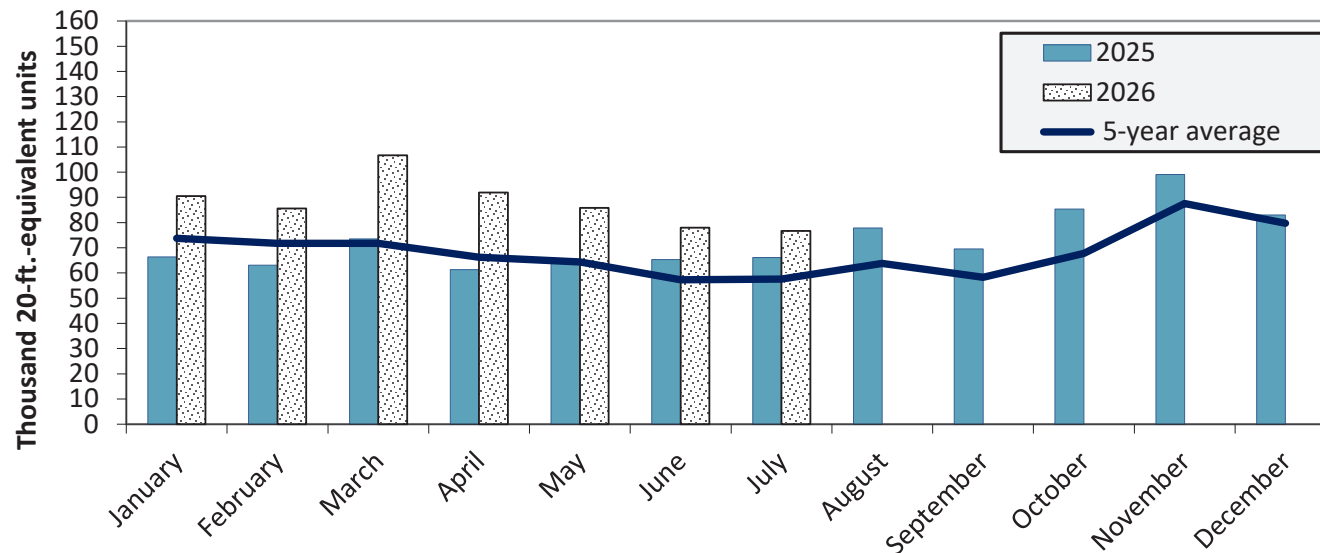
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Jun 2026



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 PERS data, S&P Global.

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



Containerized grain shipments in July 2026 were up 15.8 percent from last year and up 33.0 percent from the 5-year average.

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

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

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