



Grain Transportation Report

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Corn Exports From Norfolk, VA, in MY 2025/26—Highest in 40 Years. According to USDA Foreign Agricultural Service's [Global Agricultural Trade System](#), the Norfolk, VA, customs district exported 1.74 million metric tons (mmt) of corn in marketing year (MY) 2025/26. Up 472 percent from the prior 5-year average, the corn export total for Norfolk in MY 2025/26 was the highest since MY 1984/85.

The leading destinations for corn exports from Norfolk in MY 2025/26 were as follows: Spain (0.40 mmt); Morocco (0.39 mmt); Jamaica (0.11 mmt); and Egypt (0.10 mmt).

The corn exports likely originated from Perdue Agribusiness's export terminal in Chesapeake, VA—the only deepwater bulk grain export terminal on the East Coast. The facility can receive grain by truck, barge, and rail. Via the Norfolk and Portsmouth Belt Line Railroad, the facility has access to both CSX Transportation and Norfolk Southern Railway.

Heartland Undertakes \$60 Million Shipyard Expansion. According to [Waterways Journal](#), Heartland Fabrication, LLC (Heartland), recently announced a \$60 million expansion of its Brownsville, PA, shipyard. Slated for completion by the end of 2027, the project could raise the shipyard's annual production capability from 180 inland hopper barges to as many as 280 per year.

One of only two builders of inland hopper barges in the United States, Heartland is expanding at a crucial moment: the U.S. inland hopper barge fleet is the oldest on record, with the average covered hopper approaching 19 years of age, against a

typical 30-year service life. Retirements are expected to surge to between 800 and 1,000 barges annually over the next 5 years. In 2025, the Nation's dry covered barge fleet fell 552 vessels (or 4.1 percent) from the previous year ([GTR, June 18, 2026, second highlight](#)).

The smaller supply of barges has put upward pressure on barge rates for grain shippers. Illinois River barge rates exceeded the prior 3-year average for every week so far in 2026 ([GTR fig. 10](#)).

FMCSA Extends Automatic Relief Period for Regional Emergencies. On October 5, the Federal Motor Carrier Safety Administration (FMCSA) [issued a new rule](#) that extends—from 14 days to 30 days—the automatic period of emergency relief from trucking regulations.

Effective October 5, when a State governor, their representative, or FMCSA declares a regional emergency and suspends regulations, the automatic exemption will last 30 days. The longer exemption period is intended to reduce the administrative burden of filing and processing extension requests and to give States more flexibility to manage their own disaster responses.

Iowa Extends Weight Limits for Grain Transportation. Effective until November 7, the Iowa Governor [has extended](#) an exemption from weight limits for vehicles transporting corn; soybeans; hay; straw; silage; stover; fertilizer (dry, liquid, and gas); and manure (dry and liquid).

During the exemption period, weight limits and permits are waived for vehicles up to 90,000 pounds gross weight. Besides expanding the gross

weight limit, the waiver also covers vehicles that do not exceed the maximum axle weight limit (of 20,000 pounds) by more than 12.5 percent—as long as they comply with posted limits on roads and bridges. The waiver applies to loads transported on all highways within Iowa (except the Interstate Highway System).

USDA Projects More Corn and Soybean Production in MY 2026/27. USDA/National Agricultural Statistics Service's October [Crop Production report](#) (released last week) forecasts farmers will harvest 16.03 billion bushels (bbu) of corn and 4.56 bbu of soybeans in marketing year (MY) 2026/27—up 234 million bushels (mbu) and 27 mbu, respectively, from last month's report. At the same time, the October report's MY 2026/27 [projections](#) for corn domestic use, corn exports, and soybean exports are also raised from last month.

Most of the increased corn production is forecasted to occur in the Midwest: Nebraska, +106 mbu; South Dakota, +35 mbu; Kansas, +26 mbu; and Texas, +17 mbu. The eastern Corn Belt is also expected to see more production (corn and soybeans combined): Ohio, +34 mbu, and Michigan, +20 mbu. By State, the biggest drops from the September projections include -12 mbu of Missouri soybeans; -11 mbu of Illinois corn; -10 mbu of Iowa soybeans; and -9 mbu of Kansas soybeans.

To the extent these volume changes materialize, they will affect storage availability and, in turn, the pressure on the grain transportation and handling system during harvest ([GTR, October 8, 2026](#)).

For additional transportation news related to grain and other agricultural products, see the [Transportation Updates and Regulatory News](#) page on AgTransport. A [dataset of all news entries since January 2023](#) is also available on AgTransport.

Export Sales

Export Sales data for the week ending October 8 were not released by the time of publication because of the Federal Holiday on October 12. USDA's Foreign Agricultural Service will release its next U.S. Export Sales Report on October 16. Therefore, *Grain Transportation Report* tables 14-17 are not updated in this week's issue.

Rail

U.S. Class I railroads originated 26,643 [grain carloads](#) during the week ending October 3. This was an 11-percent decrease from the previous week, 3 percent fewer than last year, and 3 percent more than the 3-year average.

Average October [shuttle secondary railcar bids/offers](#) (per car) were \$488 above tariff for the week ending October 8. This was \$138 more than last week and \$8 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were at tariff. This was \$13 less than last week and \$25 lower than this week last year.

Barge

For the week ending October 10, [barged grain movements](#) totaled 399,450 tons. This was 20 percent more than the previous week and 18 percent less than the same week last year.

For the week ending October 10, 253 [barges moved down river](#), 37 more than the previous week. There were 751 grain barges unloaded in the New Orleans region, 3 percent more than the previous week.

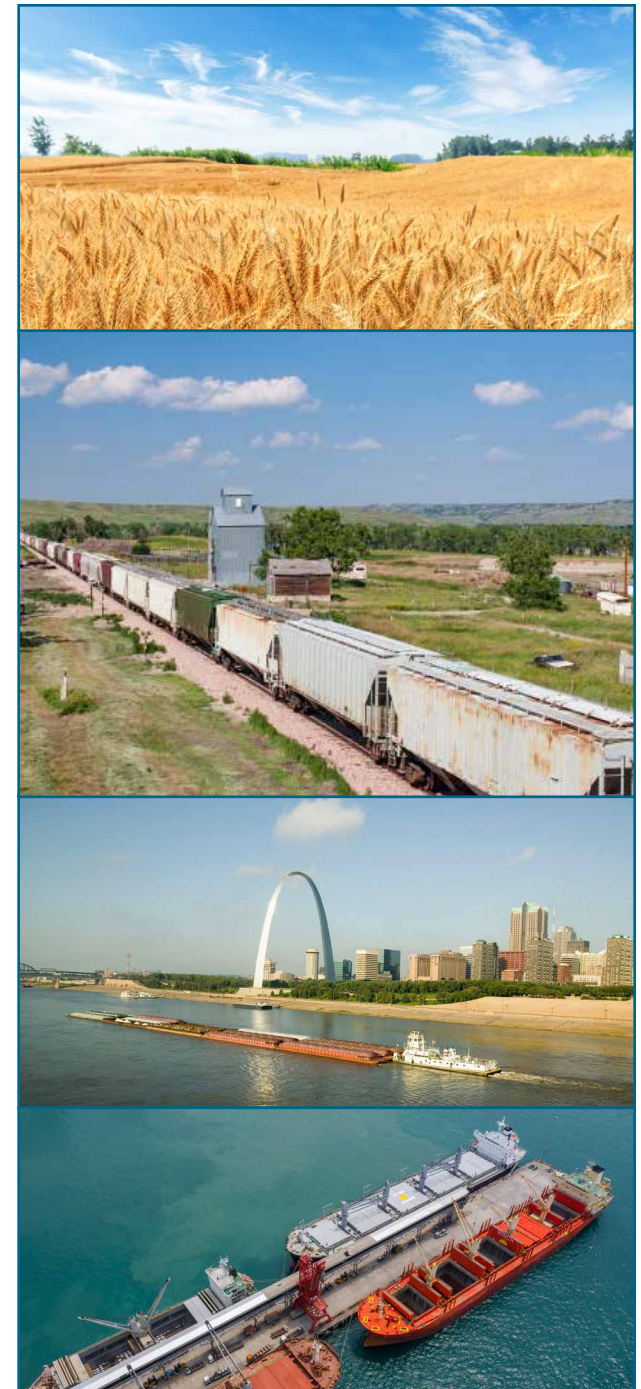
Ocean

For the week ending October 8, 28 [oceangoing grain vessels](#) were loaded in the Gulf—7 percent fewer than the same period last year. Within the next 10 days (starting October 9), 46 vessels were expected to be loaded—12 percent more than the same period last year.

As of October 8, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was \$76.25, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was \$37.50 per mt, up 1 percent from the previous week.

Fuel

For the week ending October 12, the [U.S. average diesel fuel price](#) decreased 2.0 cents from the previous week to \$6.179 per gallon, 251.4 cents above the same week last year.



Bulk Ocean Freight Rates in Third Quarter 2026

In general, ocean freight rates for shipping bulk commodities, including grain, have risen steadily since first quarter 2026, reflecting strong bulk movements and higher bunker prices. For routes from the U.S. Gulf and Pacific Northwest (PNW) to Japan, third-quarter 2026 ocean freight rates for shipping grain (wheat, corn, and soybeans) were up from second quarter 2026 (quarter to quarter); up from third quarter 2025 (year to year); and up from the prior 4-year average. From the U.S. Gulf to Europe, the third-quarter ocean freight rate was unchanged quarter to quarter, down year to year, and down from the prior 4-year average.

This article examines recent past and potential future influences on ocean freight rates. Rate changes by time period are tracked for the benchmark routes to Japan and to Europe.

Rates to Japan From the U.S. Gulf and Pacific Northwest

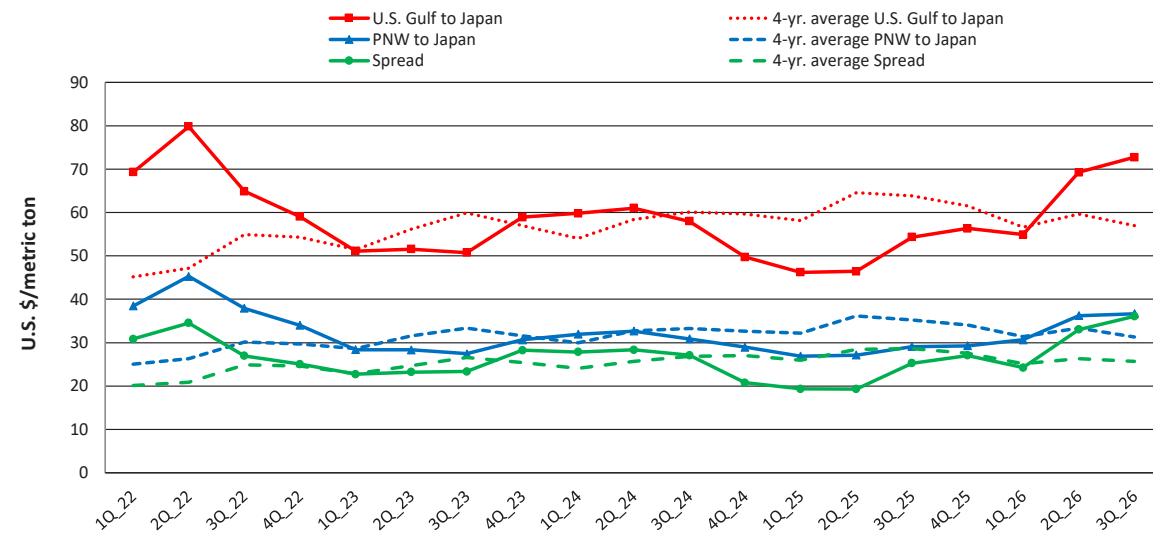
Ocean freight rates for shipping bulk grain from the U.S. Gulf to Japan averaged \$72.76 per metric ton (mt) in third quarter 2026—up 5 percent quarter to quarter, up 34 percent year to year, and up 28 percent from the 4-year average (table 1 and fig. 1). From the PNW to Japan, rates averaged \$36.67 per mt—up 1 percent quarter to quarter, up 26 percent year to year, and up 17 percent from the 4-year average. The spread (or difference) between the

Table 1. Ocean freight rates for grain routes during third quarter 2026

Route	Jul	Aug	Sep	3rd qtr. 2026	Change from		
					2nd qtr. '26	3rd qtr. '25	4-yr. avg.
	--\$/mt--			--\$/mt--	Percent		
U.S. Gulf to Japan	68.95	72.94	76.38	72.76	5	34	28
PNW to Japan	35.95	36.75	37.31	36.67	1	26	17
Spread	33.00	36.19	39.07	36.09	9	43	41
U.S. Gulf to Europe	22.05	22.44	23.13	22.54	0	-8	-17

Note: qtr. = quarter; avg. = average; mt = metric ton; yr. = year; PNW = Pacific Northwest.
Source: O'Neil Commodity Consulting/World Perspectives, Inc.

Figure 1. Grain vessel rates and spread, United States to Japan, 2022-26



Note: Q = quarter; yr. = year; PNW = Pacific Northwest.
Source: O'Neil Commodity Consulting/World Perspectives, Inc.

U.S. Gulf-to-Japan and PNW-to-Japan rates was up 9 percent from quarter to quarter, up 43 percent from year to year, and up 41 percent from the 4-year average. From the U.S. Gulf to Europe, rates averaged \$22.54 per mt—unchanged from quarter to quarter, down 8 percent year to year, and down 17 percent from the 4-year average.

Influences on Rates, by Month

July. Ocean freight rates fell slightly from June to July. China [imported](#) 108.09 million metric tons (mmt) of iron ore in July, down 4 percent from 112.69 mmt in June.

Also, at 10.12 mmt, China's July finished steel exports were down 1.99 percent from June—a drop that mainly affected Capesize and Panamax rates. The drop in exports reflected a typical seasonal slowdown in China's steel production because of weaker demand.

Indonesia, the world's largest exporter of thermal coal showed declining coal shipments from the previous year. That cargo reduction directly affected Panamax and Supramax utilization across Asia, especially for the short-haul routes between Indonesia and China. As a general rule, utilization on these routes significantly impacts overall Panamax and Supramax utilization (Shipping Insight, Drewry Maritime Research, July 6, 2026).

In China, weather events further weakened shipping demand—first, as shippers anticipated disruptions from heavy storms and, later, as the storms (including Typhoon Maysak) arrived, producing flooding and congestion at Chinese ports.

August. Ocean freight rates rose in August as China's sustained imports of iron ore defied the downturn predicted by analysts, despite multiple typhoons that had disrupted unloading activities at the ports and delayed customs clearance in July. China [imported](#) 108.54 mmt of iron ore in August—up 0.4 percent from a month earlier and up 3.1 percent from a year earlier. At 10.16 mmt, China's August steel exports rose 0.4 percent above July and 6.8 percent above a year ago.

Vessel activity (and ocean freight rates) received boosts from increased traffic out of Asia after storm-spawned disruptions had subsided, as well as strong grain shipments from the U.S. Gulf and East Coast South America, especially Argentina. Following geopolitical trade realignments and Argentina's unprecedented harvest, that country's corn [exports](#) surged in August.

Additionally, anticipating reduced rainfall through October, the Panama Canal Authority instituted draft restrictions and reduced transit slots. These actions translated to lighter cargo loads per shipment, higher costs of obtaining transit slots through the Canal, and (in many

cases) more ton-miles, as vessels rerouted around the southern tip of Africa. All these developments pushed up ocean freight rates.

September. Ocean freight rates continued to rise in September, as the demand for iron ore and coal held strong. In the Pacific, robust demand for Panamax vessels was driven by high demand for coal out of Australia and Indonesia as Middle East tensions tightened the energy market (World Perspectives, Inc., September 3, 2026). More upward pressure on ocean freight rates came from rising grain demand from the North Pacific and East Coasts of South America, as well as greater purchases of U.S. soybeans by China.

Although congestion eased at the Panama Canal, bookings remained scarce, owing to draft restrictions and transit slot reductions ahead of anticipated El Niño weather events. These conditions perpetuated use of higher-ton-mile alternative routes around Africa's southern tip ([GTR, October 1, 2026, second highlight](#)); tightened the vessel supply; and pushed up ocean freight rates.

Likewise pushing up rates, higher long-haul demand for Capesize and Panamax vessels was driven by Chinese imports of Guinea bauxite amid low Chinese port stocks. Meanwhile, bunker fuel costs continued to rise. The Global 20 ports average price per metric ton for very low sulfur fuel oil (VLSFO, IMO 2020 Grade 0.5 percent) was \$862.73 in September, up from \$809.81 in August and \$523.12 in September

2025—7 percent and 65 percent increases, respectively. Higher bunker fuel costs typically drive up vessel operating costs and raise ocean freight rates.

Current Market Analysis and Outlook

For the week ending October 8, the rate to ship 1 mt of grain from the U.S. Gulf to Japan was \$76.25—53 percent more than the first available rate at the beginning of the year and 36 percent more than for the same week in 2025. The rate from the PNW to Japan was \$37.50 per mt—42 percent more than the first available rate at the beginning of the year and 28 percent more than the same 2025 period.

Ocean freight rates for shipping bulk commodities, including grain, have remained elevated since March (while fluctuating throughout the year). Although rate changes varied by route from fourth quarter 2025 to first quarter 2026, rates rose for all routes from first to second quarter 2026 and from second to third quarter.

The main factor that could push rates down is growth in the global dry bulk operating fleet. In September, the global capacity was estimated at 1,095.5 million deadweight tons (mdwt)—a 4-percent rise from the 1,056.4 mdwt capacity in September 2025 (Shipping Insight, Drewry Maritime Research, October 7, 2026). The growth in capacity could slow the rise in ocean rates or even push rates down. Also (as of September), the share of inactive vessels was stable compared to September 2025. These conditions could moderate ocean freight rates, at least in the short run.

On the other hand, a number of factors may push rates up, and several of these center on rising vessel demand. For one thing, strong loading activity will likely continue, especially during the harvest season. As of the week ending October 8, a YTD weekly average of 29 oceangoing grain vessels had been loaded in the U.S. Gulf, and a YTD weekly average of 15 vessels had been either loaded or waiting to load in the Pacific Northwest (PNW)—compared to averages of 27 vessels and 13 vessels, respectively, during the same period in

2026. China's renewed purchases of U.S. soybeans may continue to raise demand for Panamax vessels.

Another factor raising vessel demand concerns “slow steaming.” That is to say—if higher bunker prices persist—vessel operators may attempt to conserve fuel and reduce costs by lengthening transit times. The longer transit times would push up ocean freight rates by reducing available vessel capacity.

If, because of El Niño-related conditions, the Panama Canal's transits are further restricted and more vessels are forced to reroute around Africa, the available fleet's ton-miles could continue to rise and further push up rates. This effect may be magnified if strong U.S. grain exports coincide with the transit restrictions.

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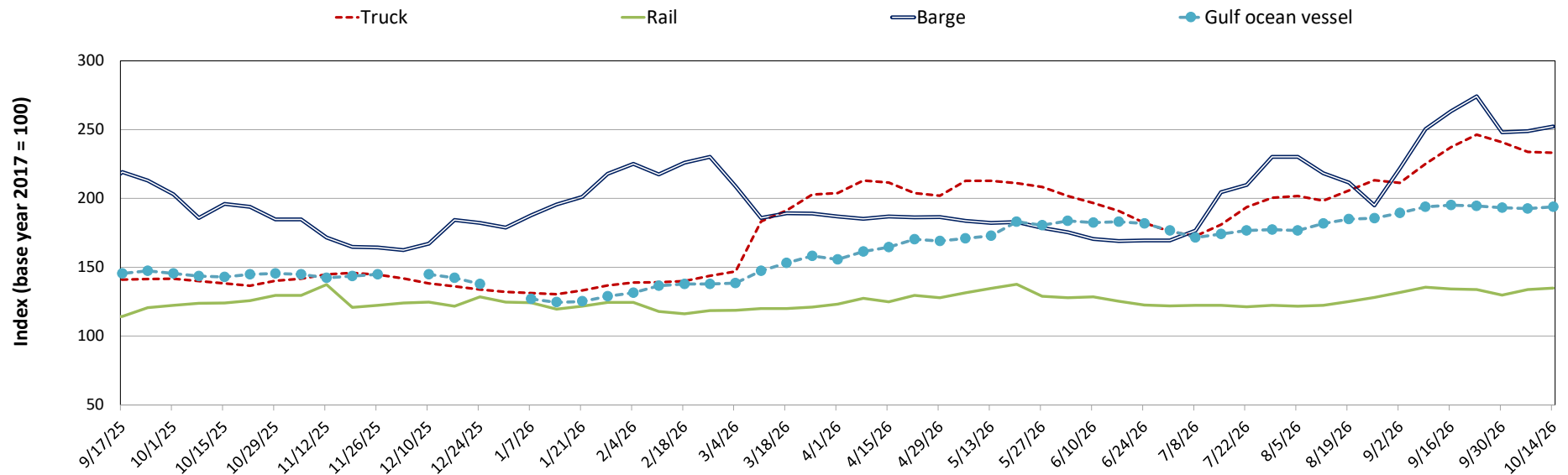
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
10/14/26	233	135	252	194	178
10/07/26	234	134	249	193	176
10/15/25	138	124	196	143	139

Note: Base year 2017 = 100. Weekly updates include truck = diesel (\$/gallon); rail = near-month secondary rail market value and monthly tariff rate with fuel surcharge for select shuttle train routes (\$/car); barge = Illinois River barge rate (index = percent of tariff rate); ocean = routes to Japan (\$/metric ton); n/a = not available.
Source: USDA, Agricultural Marketing Service.

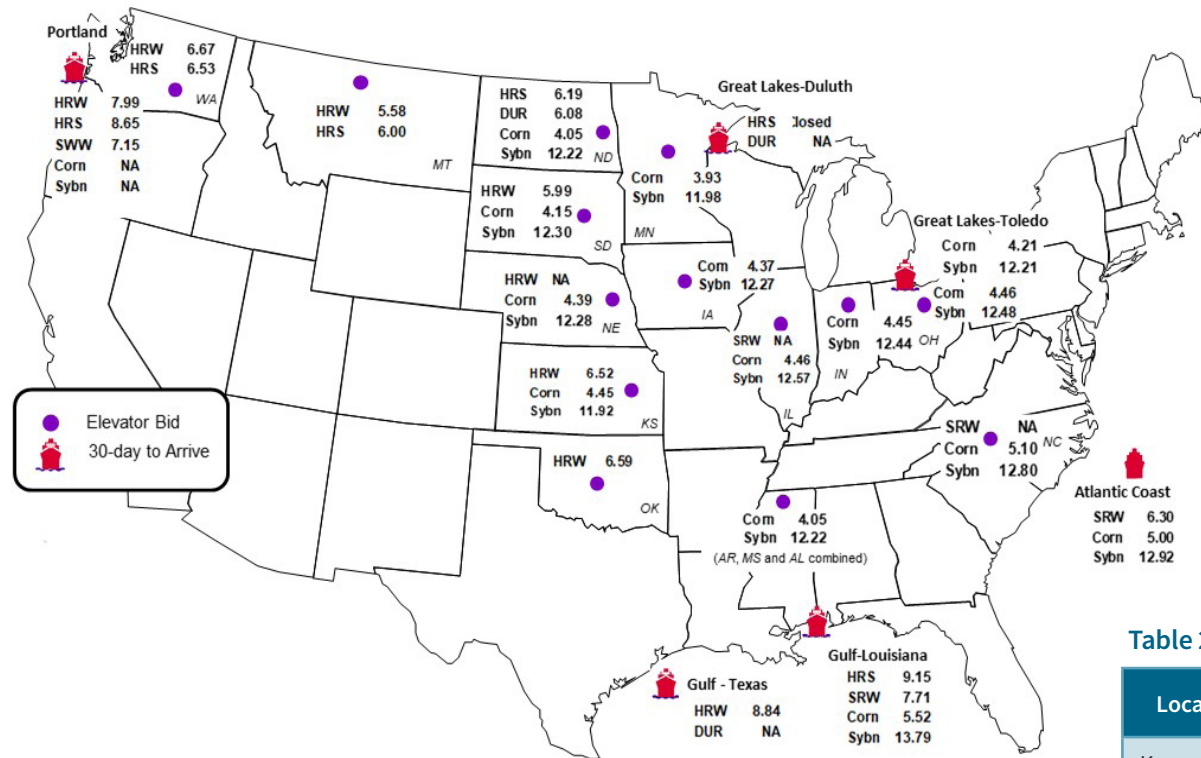
Figure 1. Grain transportation cost indicators as of week ending 10/14/26



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	10/9/2026	10/2/2026
Corn	IL-Gulf	-1.06	-0.98
Corn	NE-Gulf	-1.13	-1.06
Soybean	IA-Gulf	-1.52	-1.51
HRW	KS-Gulf	-2.32	-2.37
HRS	ND-Portland	-2.46	-2.46

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	10/09/2026	Week ago 10/02/2026	Year ago 10/10/2025
Kansas City	Wht	Dec	7.190	7.352	4.828
Minneapolis	Wht	Dec	6.953	6.980	5.518
Chicago	Wht	Dec	6.710	6.828	5.152
Chicago	Corn	Dec	4.798	4.978	4.128
Chicago	Sybn	Dec	12.918	12.782	10.066

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

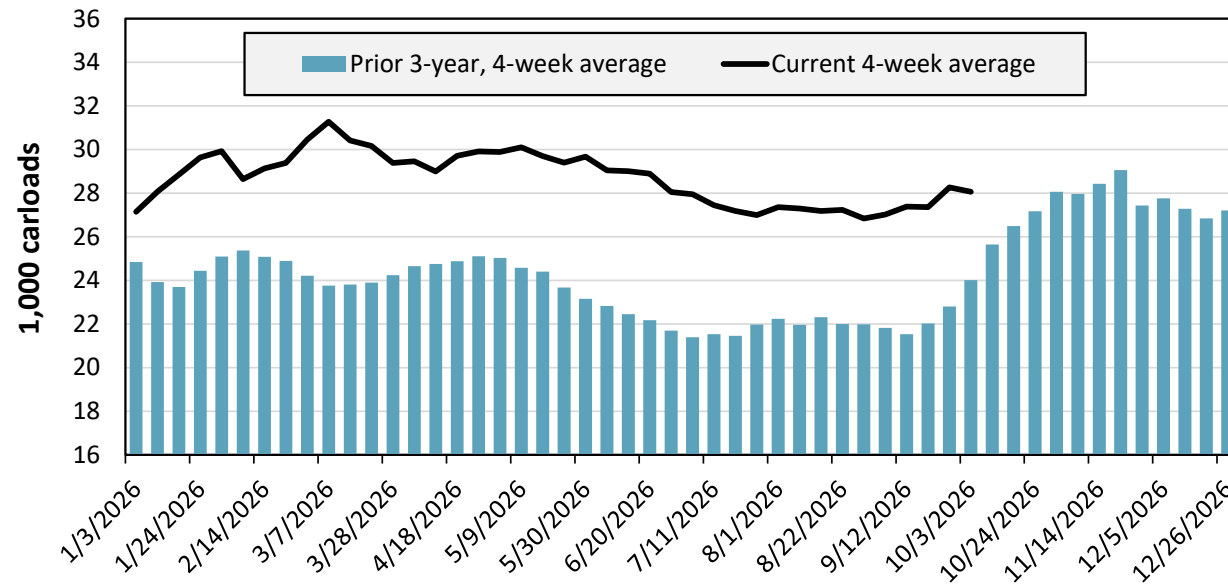
Table 3. Class I rail carrier grain car bulletin (grain carloads originated)

For the week ending: 10/03/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,484	1,414	12,118	6,154	3,925	1,548	26,643
This week last year	1,749	2,648	11,420	6,517	3,406	1,858	27,598
2026 YTD	58,250	98,494	498,553	259,780	141,759	66,220	1,123,056
2025 YTD	61,050	106,452	443,657	231,223	112,394	55,163	1,009,939
2026 YTD as % of 2025 YTD	95	93	112	112	126	120	111
Last 4 weeks as % of 2025	100	99	101	104	122	139	106
Last 4 weeks as % of 3-yr. avg.	104	101	112	120	136	142	117
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 October 3, grain carloads were down 1 percent from the previous week, up 6 percent from last year, and up 17 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: 10/2/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	25.4	28.3	19.1	16.7	7.2	20.7	19.6
	Average over last 4 weeks	35.3	27.0	20.8	21.7	8.1	22.4	22.5
	Average of same 4 weeks last year	16.1	30.3	11.3	17.7	8.5	22.9	17.8
Average grain unit train speeds (miles per hour)	This week	21.9	19.5	23.9	23.3	20.8	18.8	21.4
	Average over last 4 weeks	21.9	18.7	24.1	22.8	22.9	18.5	21.5
	Average of same 4 weeks last year	22.8	20.0	24.9	23.2	24.3	16.3	21.9

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

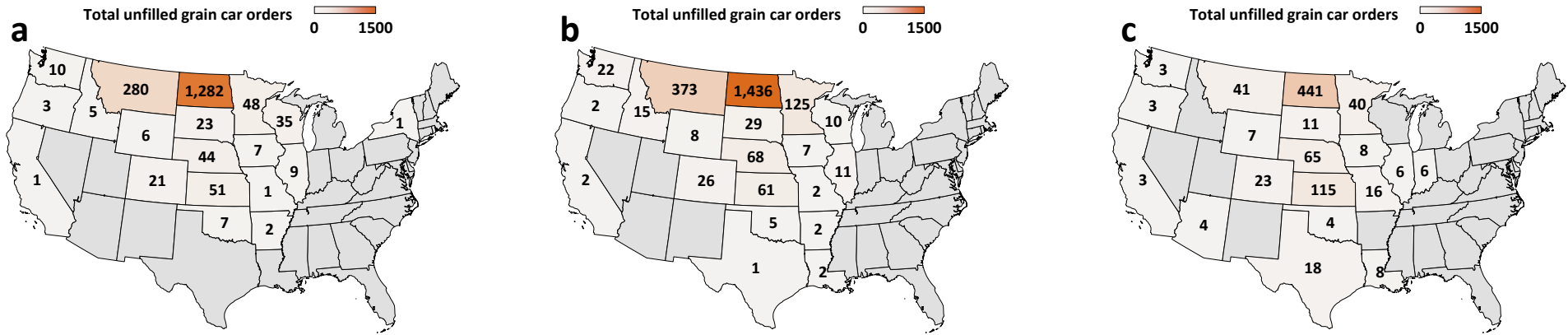
For the week ending: 10/2/2026		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	33	36	324	56	1	162	613
	Average over last 4 weeks	43	27	353	59	4	159	644
	Average of same 4 weeks last year	11	5	255	62	4	250	585
Average number of loaded grain cars not moved in over 48 hours	This week	20	305	432	36	1	211	1,006
	Average over last 4 weeks	24	337	456	40	3	262	1,122
	Average of same 4 weeks last year	7	153	305	49	3	511	1,027
Average number of grain unit trains held	This week	0	0	11	3	1	4	19
	Average over last 4 weeks	0	0	6	4	0	5	15
	Average of same 4 weeks last year	0	0	2	3	0	6	12
Total unfilled manifest grain car orders	This week	1	0	643	99	0	1,118	1,861
	Average over last 4 weeks	0	1	823	94	0	1,321	2,239
	Average of same 4 weeks last year	9	0	285	131	0	453	878

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](#).

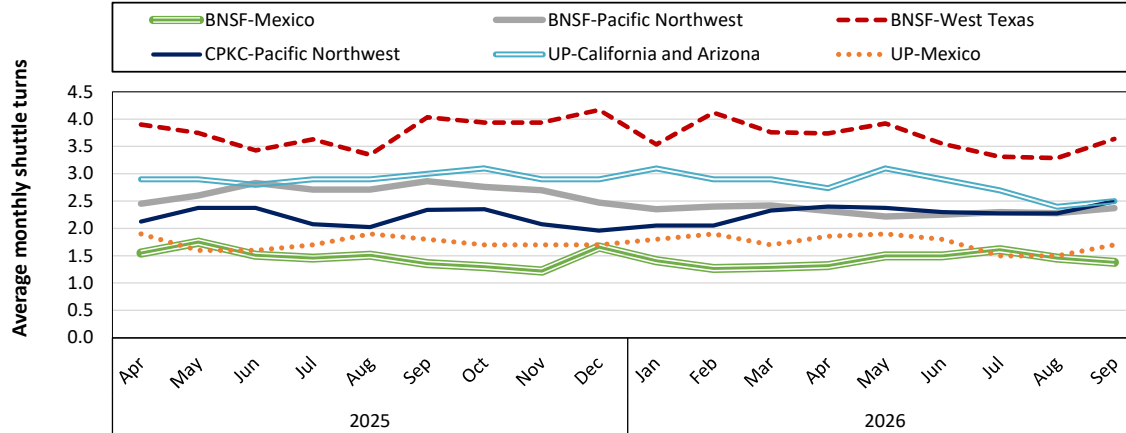
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 10/2/2026 (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

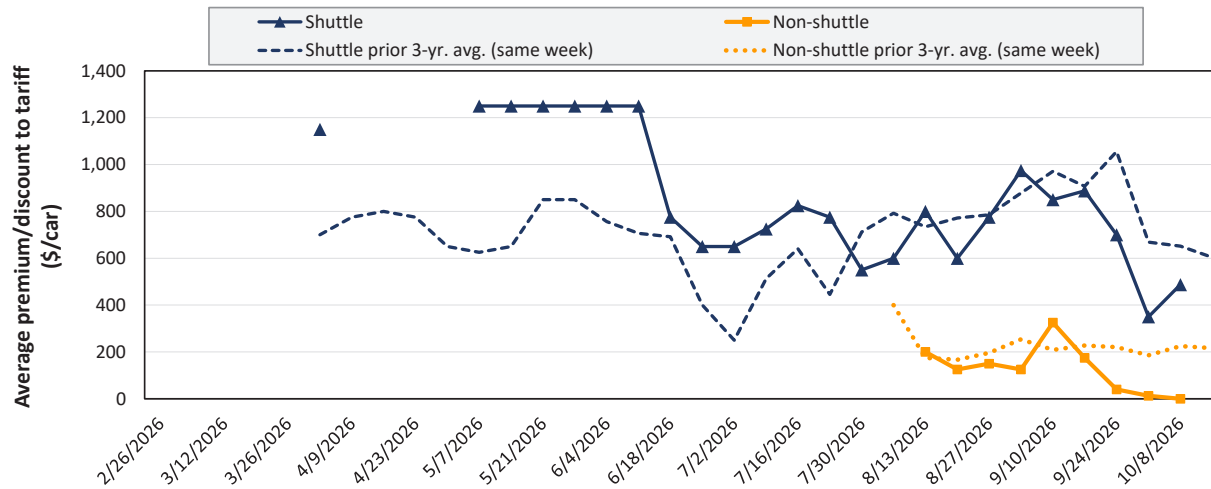


In September 2026, BNSF Railway's average monthly grain shuttle turns were 1.4 to Mexico, 2.4 to the Pacific Northwest, and 3.6 to West Texas. CPKC's shuttle turns averaged 2.5 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.5 to California and Arizona, and they averaged 1.7 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](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



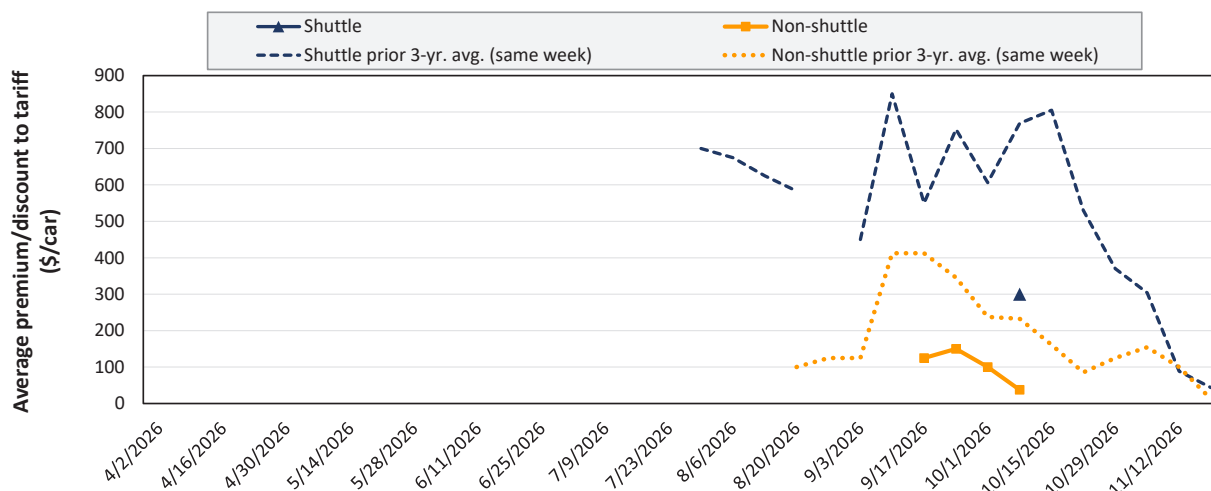
Average non-shuttle bids/offers fell \$13 this week, and are \$325 below the peak.

Average shuttle bids/offers rose \$138 this week and are \$763 below the peak.

10/8/2026	BNSF	UP
Non-Shuttle	\$0	n/a
Shuttle	\$575	\$400

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



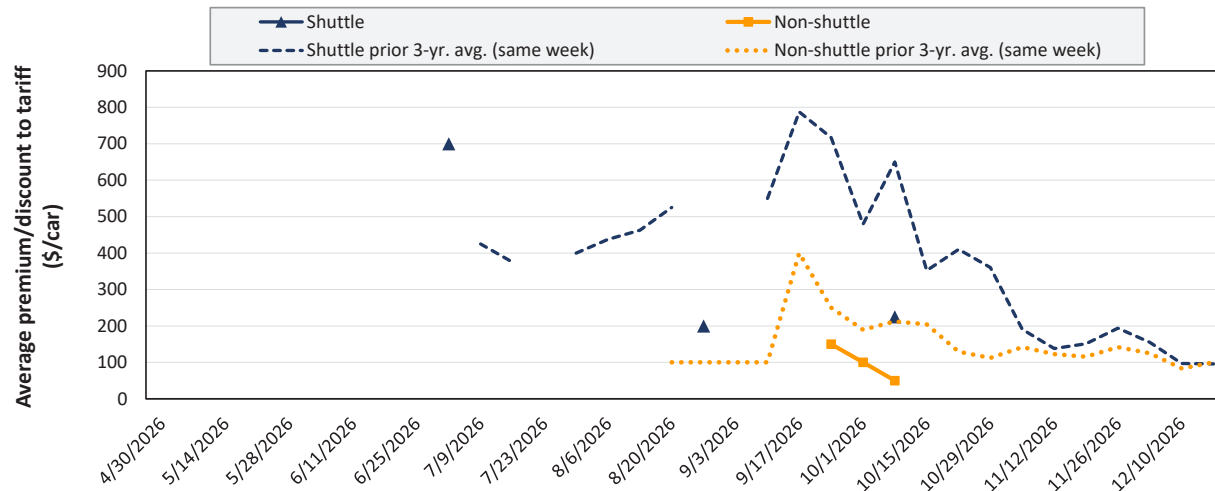
Average non-shuttle bids/offers fell \$63 this week, and are \$113 below the peak.

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

10/8/2026	BNSF	UP
Non-Shuttle	\$50	\$25
Shuttle	n/a	\$300

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 \$100 below the peak.

There were no shuttle bids/offers last week. Average shuttle bids/offers this week are \$475 below the peak.

10/8/2026	BNSF	UP
Non-Shuttle	\$50	\$50
Shuttle	\$200	\$250

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: 10/8/2026		Delivery period					
		Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27
Non-shuttle	BNSF	0	50	50	n/a	n/a	n/a
	Change from last week	0	-50	-50	n/a	n/a	n/a
	Change from same week 2025	-25	0	0	n/a	n/a	n/a
	UP	n/a	25	50	n/a	n/a	n/a
	Change from last week	n/a	-75	-50	n/a	n/a	n/a
	Change from same week 2025	n/a	-25	-50	n/a	n/a	n/a
Shuttle	BNSF	575	n/a	200	n/a	n/a	n/a
	Change from last week	0	n/a	n/a	n/a	n/a	n/a
	Change from same week 2025	58	n/a	-300	n/a	n/a	n/a
	UP	400	300	250	n/a	n/a	n/a
	Change from last week	275	n/a	n/a	n/a	n/a	n/a
	Change from same week 2025	-74	100	100	n/a	n/a	n/a
	CPKC	n/a	400	400	n/a	n/a	n/a
	Change from last week	n/a	n/a	-100	n/a	n/a	n/a
	Change from same week 2025	n/a	300	300	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

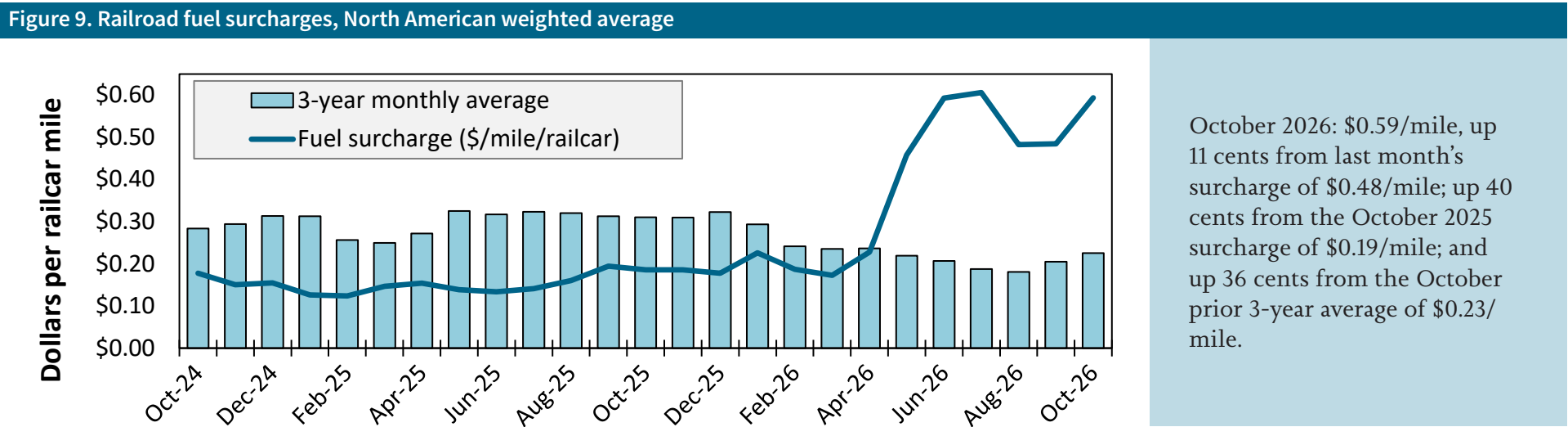
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage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

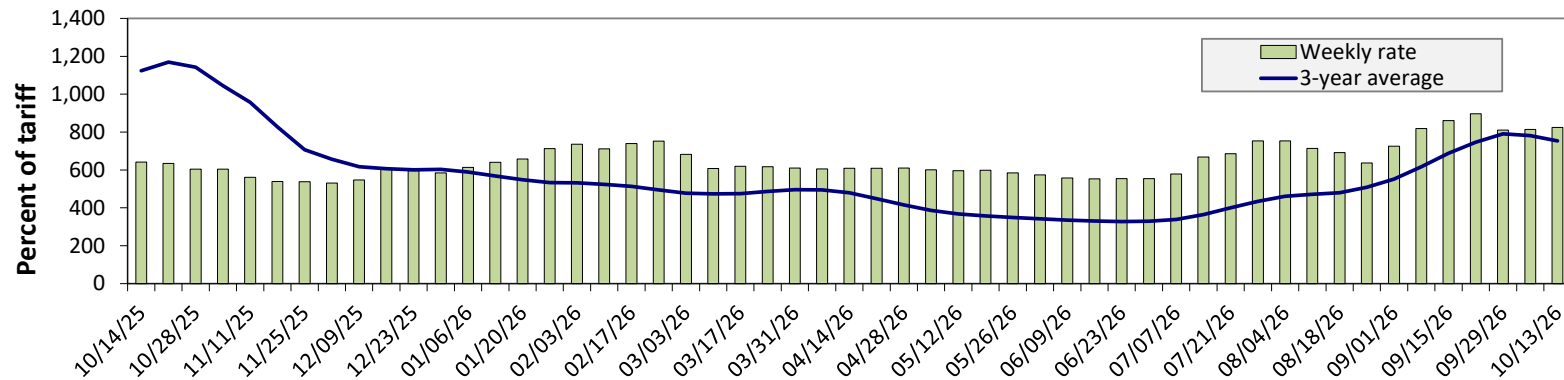
Commodity	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Adair, IL	El Paso, TX	Shuttle	\$4,560	\$577	\$5,137	\$1.28	\$50.56	7.7
	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 13: 1 percent higher than the previous week; 29 percent higher than last year; and 9 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	10/13/2026	852	839	825	673	794	567
	10/6/2026	832	839	814	723	839	621
\$/ton	10/13/2026	52.74	44.63	38.28	26.85	37.24	17.80
	10/6/2026	51.50	44.63	37.77	28.85	39.35	19.50
Measure	Time Period	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Current week % change from the same week	Last year	40	27	29	34	58	30
	3-year avg.	18	11	9	-7	6	-22
Rate	November	793	750	697	620	656	513
	January	n/a	n/a	636	542	581	493

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](#).

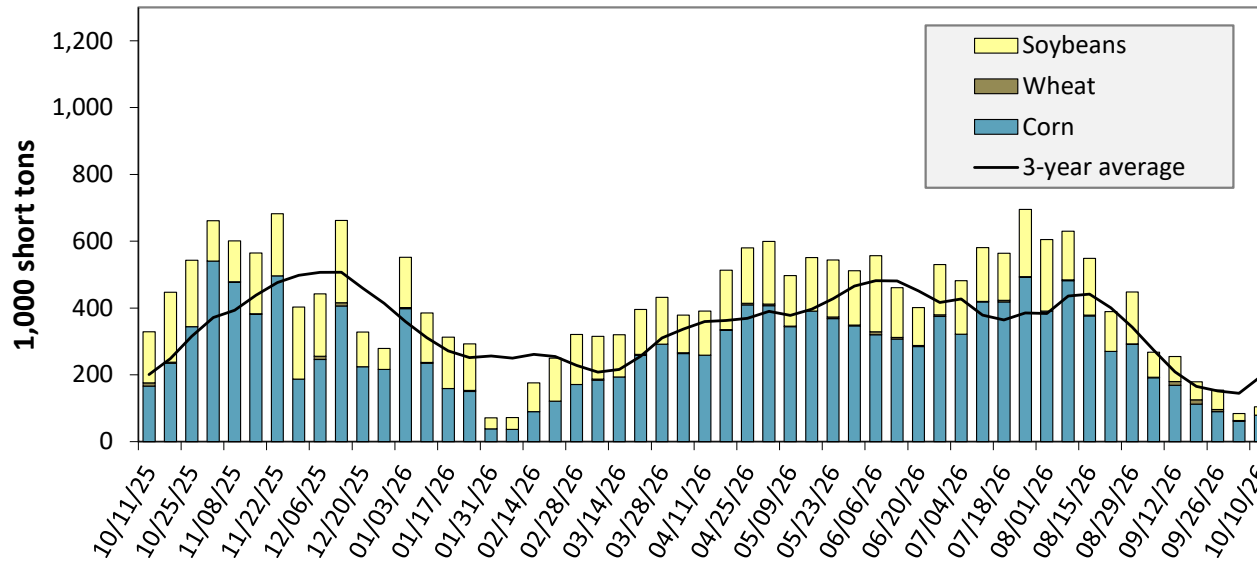
Source: USDA, Agricultural Marketing Service.

Figure 11. Benchmark tariff rates



Source: USDA, Agricultural Marketing Service.

Figure 12. Barge movements on the Mississippi River (Locks 27-Granite City, IL)



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

For the week ending October 10: 68 percent lower than last year and 47 percent lower than the 3-year average.

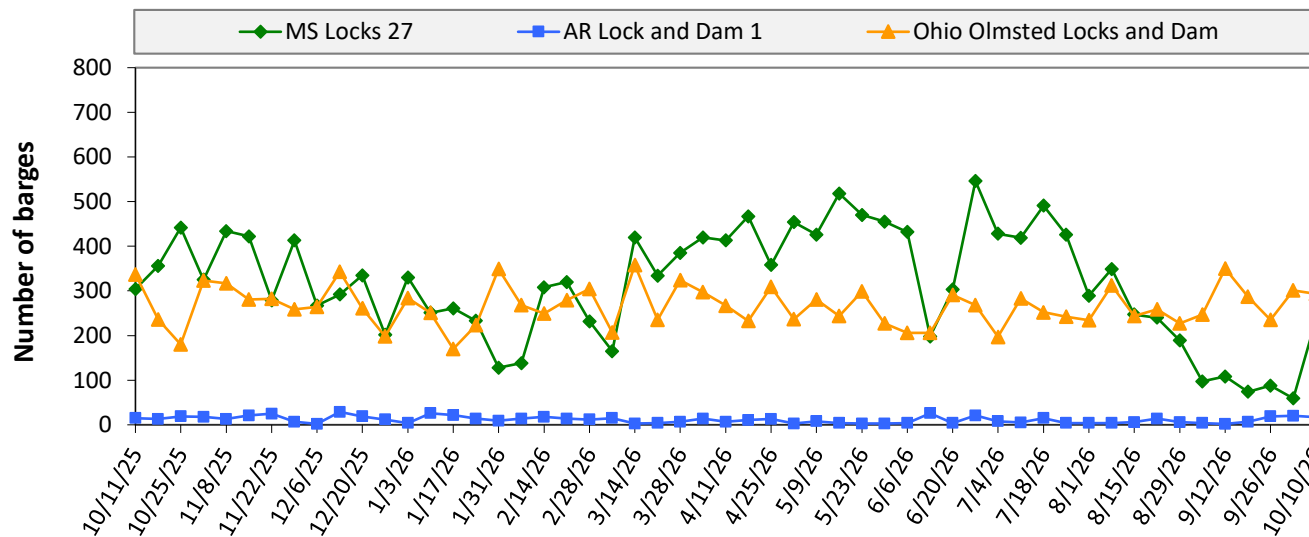
Table 10. Barged grain movements (1,000 tons)

For the week ending 10/10/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	9	0	8	0	17
Mississippi River (Winfield, MO (L25))	50	0	9	0	60
Mississippi River (Alton, IL (L26))	49	0	24	0	72
Mississippi River (Granite City, IL (L27))	79	0	25	0	104
Illinois River (La Grange)	2	0	10	0	11
Ohio River (Olmsted)	111	2	167	0	280
Arkansas River (L1)	0	0	15	0	15
Weekly total - 2026	190	2	207	0	399
Weekly total - 2025	221	17	249	0	487
2026 YTD	13,463	722	7,943	87	22,214
2025 YTD	15,020	1,100	8,161	144	24,424
2026 as % of 2025 YTD	90	66	97	61	91
Last 4 weeks as % of 2025	89	40	147	130	106
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.

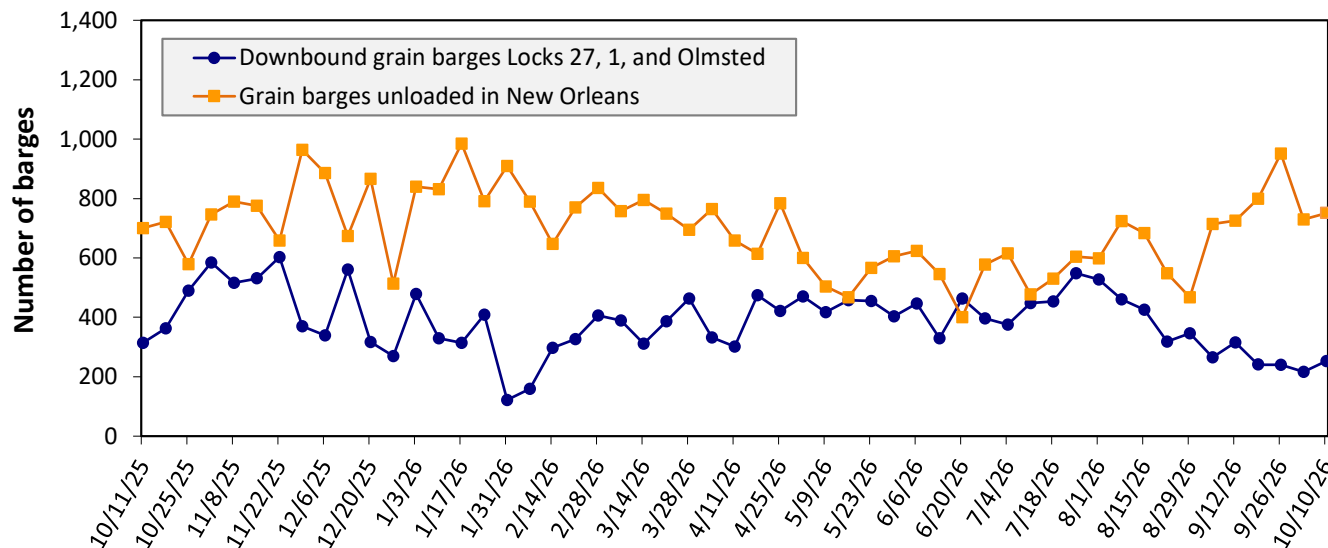
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending October 10: 546 barges transited the locks, 166 barges more than the previous week, and 5 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 10: 253 barges moved down river, 37 more than the previous week; 751 grain barges unloaded in the New Orleans Region, 3 percent more than the previous week.

Note: Olmsted = Olmsted Locks and Dam.

Source: U.S. Army Corps of Engineers and USDA, Agricultural Marketing Service.

Table 11. Monthly barge freight rates, Columbia-Snake River

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

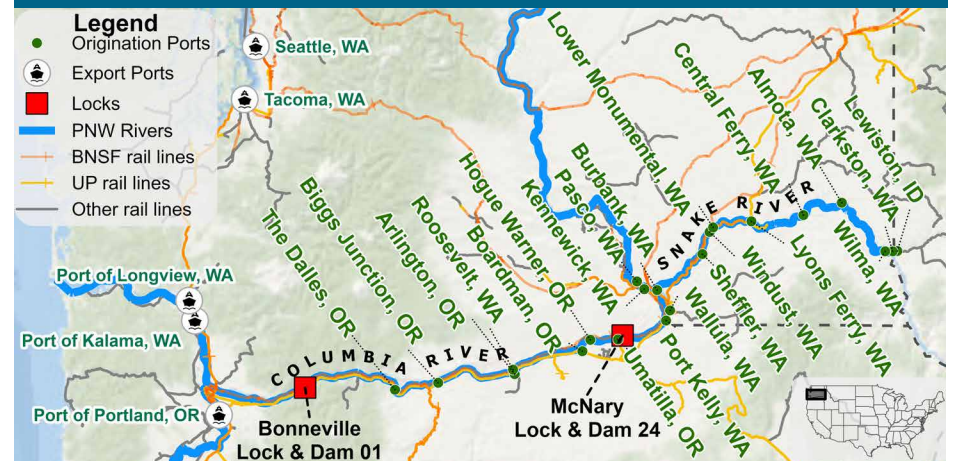
Note: Destination is Portland, OR, or Vancouver, WA; ton = 2,000 pounds; n/a = data not available.
Source: USDA, Agricultural Marketing Service.

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.

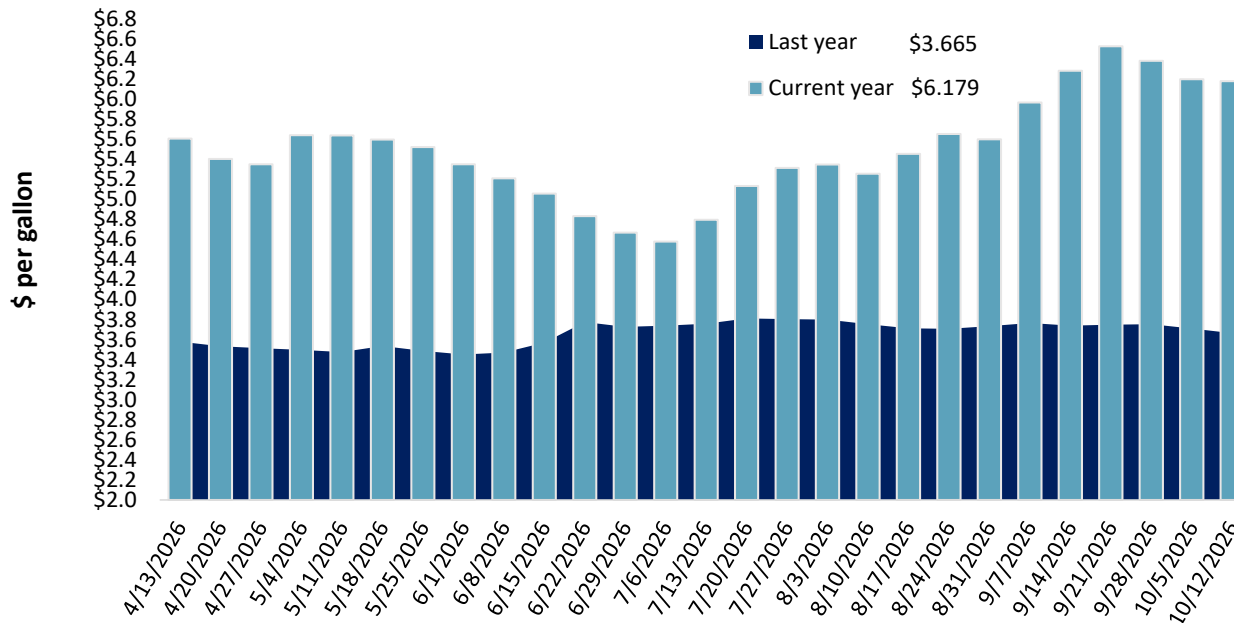
Table 13. Retail on-highway diesel prices, week ending 10/12/2026 (U.S. \$/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.908	-0.043	2.187
	New England	6.441	-0.035	2.492
	Central Atlantic	6.471	-0.014	2.594
	Lower Atlantic	5.645	-0.054	2.006
II	Midwest	6.259	-0.027	2.653
III	Gulf Coast	5.809	-0.010	2.510
IV	Rocky Mountain	6.302	0.035	2.644
V	West Coast	7.240	0.011	2.776
	West Coast less California	6.503	0.013	2.451
	California	8.091	0.009	3.151
Total	United States	6.179	-0.020	2.514

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 12, the U.S. average diesel fuel price decreased 2.0 cents from the previous week to \$6.179 per gallon, 251.4 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 October 2026	83,824	87,101	-4	-
Corn use for ethanol USDA forecast, October 2026	143,510	140,894	2	-

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	49%	31%	-	-
Change from prior week	549	919	-	-
Top 5 importers' share of U.S. soybean export sales	65%	28%	-	72%
USDA forecast, October 2026	46,130	41,232	12	-

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	50%	60%	-	-
Change from prior week	452	888	-	-
Top 10 importers' share of U.S. wheat export sales	75%	64%	-	72%
USDA forecast, October 2026	20,412	24,712	-17	-

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)

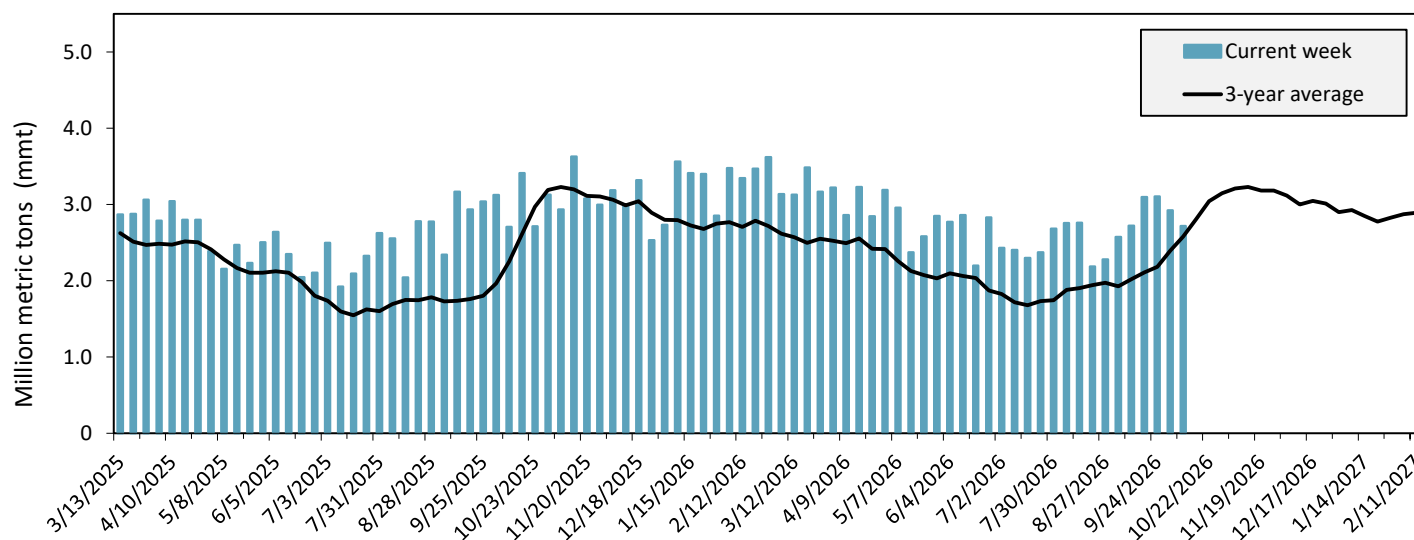
Port regions	Commodity	For the week ending 10/08/2026	Previous week	Current week as % of previous	2026 YTD	2025 YTD	2026 YTD as % of 2025 YTD	Last 4-weeks as % of:		2025 total
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	456	494	92	21,072	17,497	120	195	440	24,214
	Soybeans	207	0	n/a	4,388	1,966	223	n/a	34	2,957
	Wheat	197	248	80	8,359	9,739	86	47	60	12,271
	All grain	860	741	116	34,134	29,318	116	116	135	39,721
Mississippi Gulf	Corn	584	372	157	29,228	29,392	99	72	97	37,115
	Soybeans	700	1,134	62	18,626	16,046	116	159	148	23,350
	Wheat	37	30	123	2,368	3,299	72	37	36	3,980
	All grain	1,320	1,539	86	50,348	48,777	103	104	117	64,484
Texas Gulf	Corn	9	35	26	1,424	510	279	139	224	590
	Soybeans	0	0	n/a	100	208	48	0	0	1,431
	Wheat	24	0	n/a	2,210	3,986	55	31	65	4,690
	All grain	33	35	93	7,312	5,302	138	35	54	7,774
Interior	Corn	241	440	55	12,844	11,609	111	106	130	15,546
	Soybeans	117	65	179	5,364	5,464	98	51	60	7,713
	Wheat	35	25	142	2,447	2,545	96	65	90	3,104
	All grain	407	544	75	21,071	20,029	105	87	108	26,888
Great Lakes	Corn	0	0	n/a	381	147	260	56	169	414
	Soybeans	21	0	n/a	87	21	412	101	223	63
	Wheat	11	0	n/a	273	235	116	50	30	434
	All grain	32	0	n/a	741	403	184	63	71	911
Atlantic	Corn	12	62	20	1,477	396	373	53	100	607
	Soybeans	52	0	n/a	669	604	111	51	143	1,085
	Wheat	0	0	n/a	22	75	30	11	21	81
	All grain	65	63	104	2,168	1,076	202	49	105	1,773
All Regions	Corn	1,302	1,403	93	66,426	59,551	112	104	150	78,486
	Soybeans	1,097	1,199	91	29,744	24,458	122	133	114	36,852
	Wheat	305	303	101	15,680	19,880	79	44	58	24,560
	All grain	2,717	2,923	93	116,284	105,054	111	97	115	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.

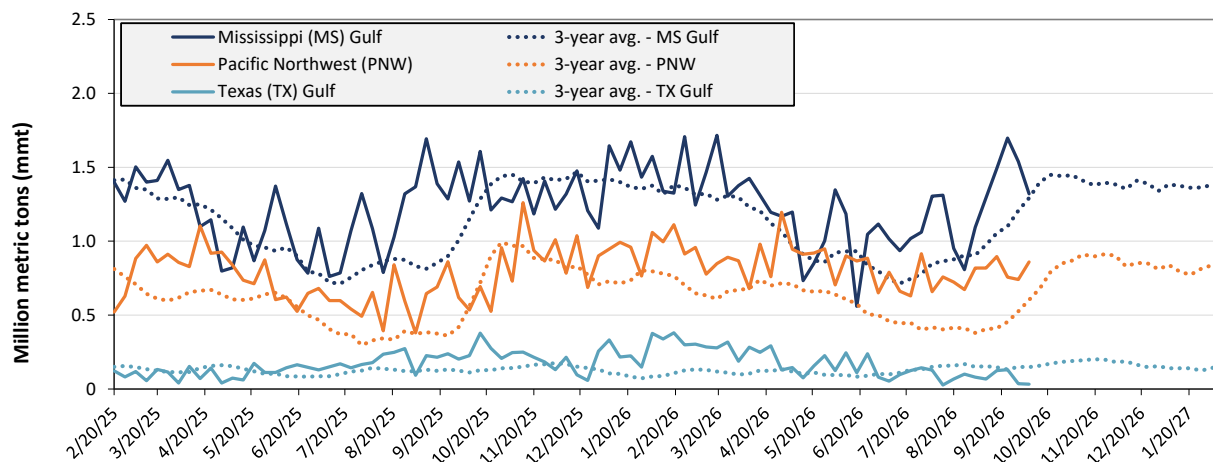
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending October 08: 2.7 mmt of grain inspected, down 7 percent from the previous week, unchanged from the same week last year, and up 5 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 10/08/26 inspections (mmt):

MS Gulf: 1.32

PNW: 0.86

TX Gulf: 0.03

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 14	down 7	down 14	up 16
Last year (same 7 days)	up 3	down 88	down 13	up 65
3-year average (4-week moving average)	up 2	down 78	down 6	up 42

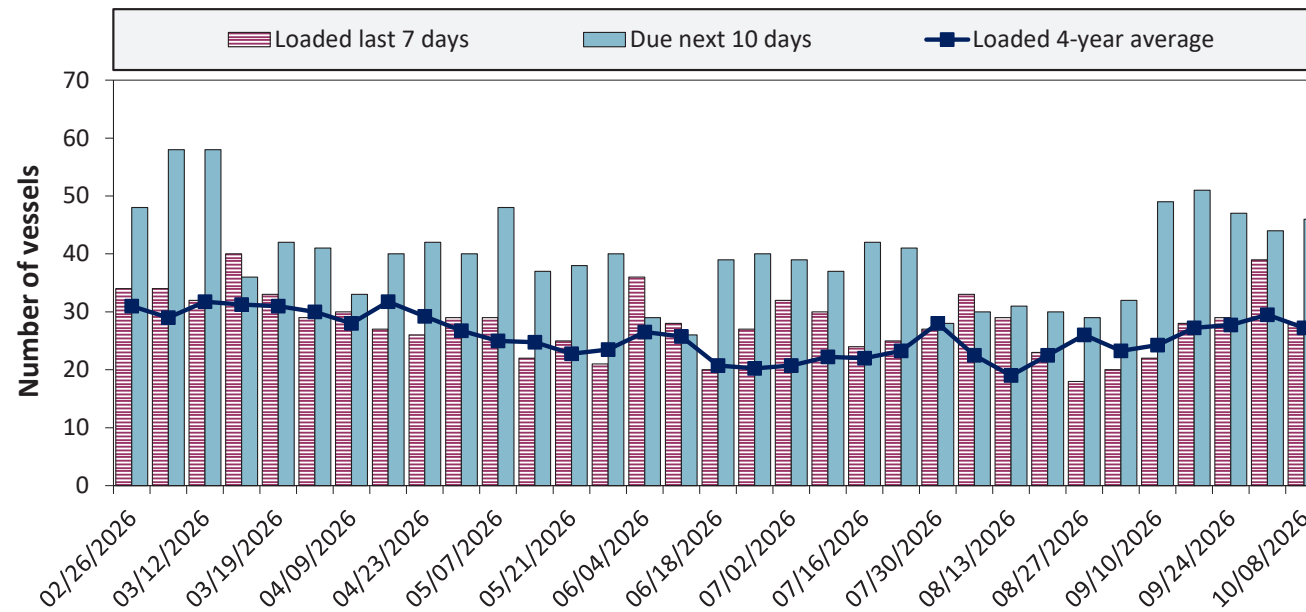
Source: USDA, Federal Grain Inspection Service.

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
10/8/2026	27	28	46	17
10/1/2026	23	39	44	16
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.

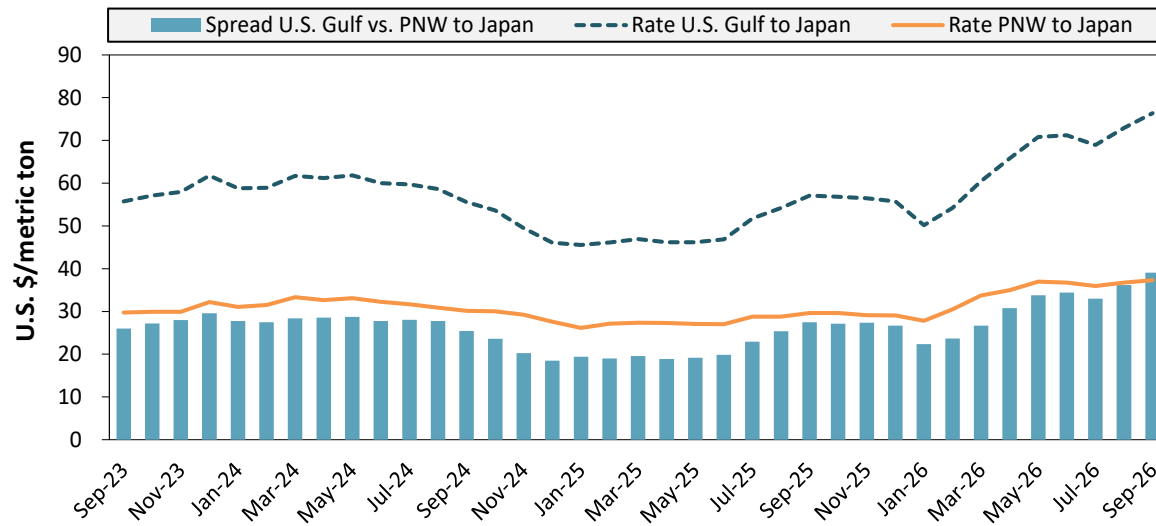
Figure 19. U.S. Gulf vessel loading activity



Week ending 10/08/26, number of vessels	Loaded	Due
Change from last year	-7%	12%
Change from 4-year average	3%	-8%

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 10/10/2026

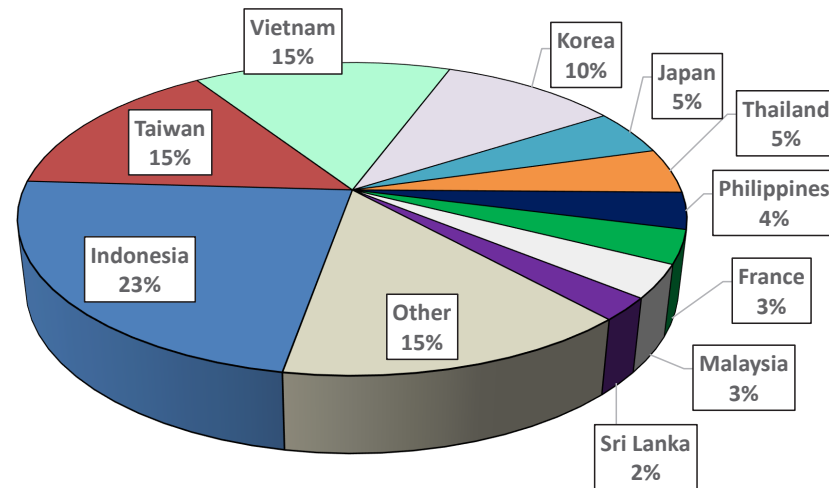
Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US\$/metric ton)
U.S. Gulf	N. China	Heavy grain	Oct 1, 2026	Oct 22/31, 2026	68,000	77.00
U.S. Gulf	N. China	Heavy grain	Sep 3, 2026	Sep 20/30, 2026	68,000	76.00
U.S. Gulf	N. China	Heavy grain	Aug 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
Vancouver	Vietnam	Heavy grain	Oct 9, 2026	Nov 15/20, 2026	65,000	37.00
Brazil	China	Heavy grain	Aug 19, 2026	Sep 15/20, 2026	64,000	51.15
Brazil	China	Heavy grain	Aug 12, 2026	Aug 20/30, 2026	63,000	50.50
Brazil	China	Heavy grain	Jul 29, 2026	Aug 21/30, 2026	63,000	49.75
Brazil	China	Heavy grain	Jul 29, 2026	Aug 15/20, 2026	63,000	50.00
Brazil	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.

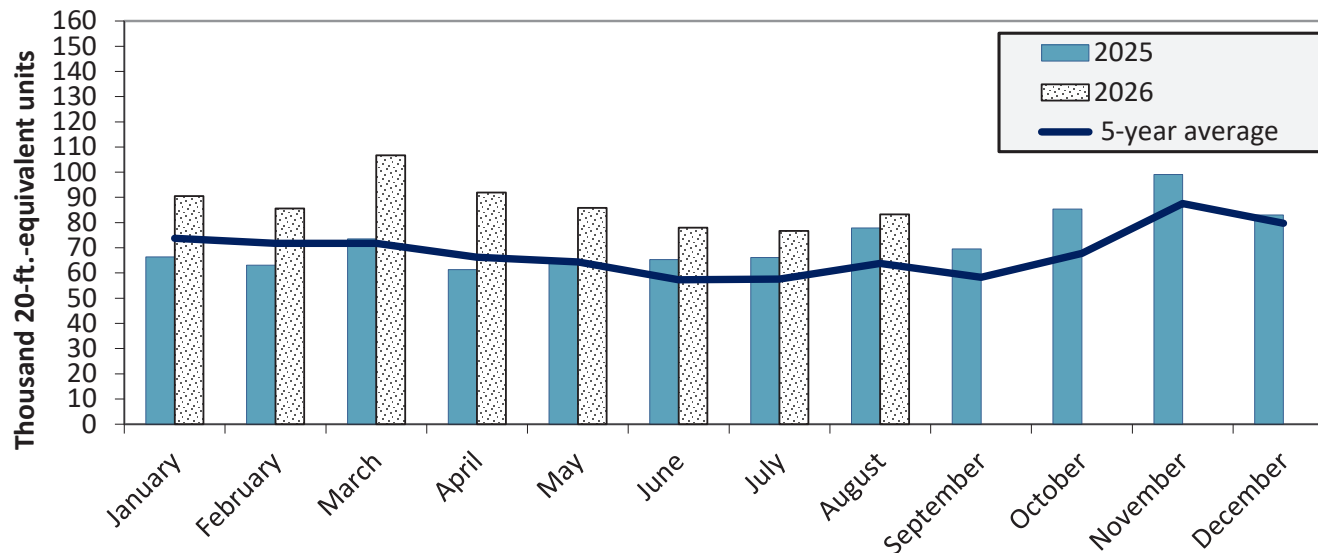
Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Aug 2026



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

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

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



Containerized grain shipments in August 2026 were up 7.0 percent from last year and up 30.5 percent from the 5-year average.

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

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

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