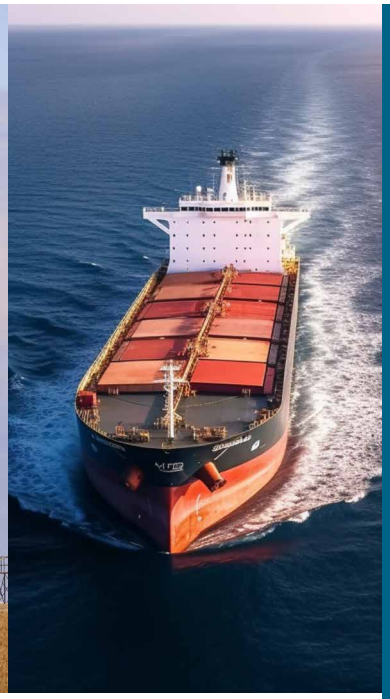
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

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November 19, 2026
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www.ams.usda.gov/GTR

Panama Canal Eases Transit and Draft Restrictions. On November 9, the Panama Canal Authority (PCA) eased draft and transit restrictions in response to improved water conditions and successful water-conservation measures. Adding one daily booking slot at the Panamax locks raised the Canal's total daily capacity to 34 transit slots across the Neopanamax and Panamax locks. The PCA also raised the draft level through the Neopanamax locks to 50 feet—the maximum allowable.

In recent months, the Panama Canal's transit restrictions and congestion have forced China-bound soybean exports from the U.S. Gulf to take a longer route around Africa's Cape of Good Hope. USDA/Federal Grain Inspection Service's data show that 39 vessels carrying 2.5 million metric tons of soybeans were inspected for export at U.S. Gulf export terminals in October for shipment to China. All these vessels are now en route via the Cape of Good Hope. The last U.S. Gulf-to-China grain export to transit the Panama Canal was sorghum cargo that left Texas Gulf in late July.

Coast Guard Restricts Vessel Traffic on Lower Mississippi River. On November 18, the U.S. Coast Guard published a temporary rule restricting vessel traffic near New Orleans after a tanker struck a docked passenger vessel near the city's Crescent City Connection Bridge on November 13. The Coast Guard will enforce the rule through December 11 unless the Captain of the Port ends it sooner. A restricted "safety zone" extends 500 feet from the left bank when facing downstream between river miles 95.5 and 96.5, and vessels need Coast Guard authorization to enter it.

Under the Coast Guard's November 17 navigation notice, deep-draft vessels and tows pushing 10 or more barges must pass through the affected stretch one direction at a time. Before transiting, all vessels must coordinate with Vessel Traffic Service Lower Mississippi River and proceed at the lowest speed consistent with safe navigation. The bridge's alternate span remains closed, and the main span is open to limited two-way traffic outside of the safety zone.

U.S. Retail Diesel Falls Below $6 per Gallon. The U.S. Energy Information Administration (EIA) reported a U.S. average diesel price of $5.937 per gallon on November 16. Down 19 cents from the previous week, the national price remained $2.069 per gallon above the same week last year.

Midwest diesel fell 23.4 cents from the previous week to $5.967 per gallon, while Gulf Coast diesel fell 19.4 cents to $5.547 per gallon. The West Coast average declined 16.2 cents to $6.948 per gallon (GTR table 13). Over the 2 weeks ending November 16, the national average fell 35.5 cents, yielding the first weekly average below $6 per gallon since the week ending September 7. The drops reflect easing geopolitical tensions and waning seasonal demand.

In EIA's November *Short Term Energy Outlook*, diesel prices are projected to average $5.03 per gallon in 2027—22 cents below the projected 2026 average of $5.25 per gallon, but 54 cents above EIA's October forecast. EIA expects global supplies of petroleum products to remain tight through the end of 2027, sustaining strong gasoline and diesel profit margins and encouraging U.S. refineries to maintain high production levels.

White House Extends Jones Act Waiver Through February. Last week, the U.S. President announced another 90-day suspension of Section 27 of the Merchant Marine Act of 1920—commonly referred to as the "Jones Act." The waiver, which enables foreign-flagged vessels to transport cargoes between U.S. ports, applies to shipments of energy and fertilizer products.

First implemented in March, the waiver was extended (for the first time) in April and again in August, when eligibility was narrowed: rather than receiving a blanket exemption from the Jones Act's requirements, voyages were evaluated case by case, based on factors such as the availability of a Jones Act-eligible ship (**GTR, August 13, 2026, first highlight**).

According to data from the Department of Transportation's Maritime Administration, the waiver has supported 350 voyages since March, moving more than 90 million barrels of energy products, primarily gasoline and crude oil. The waiver has also facilitated the movement of approximately 185,000 metric tons of anhydrous ammonia, in addition to other fertilizer products.

*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 November 12, **unshipped balances** of corn, soybeans, and wheat for marketing year (MY) 2026/27 totaled 37.64 million metric tons (mmt), down 1 percent from the week ending November 5 and up 6 percent from the same time last year.

Net **corn export sales** for MY 2026/27 were 1.59 mmt, down 45 percent from the week ending November 5. Net **soybean export sales** were 1.50 mmt, up 30 percent from the week ending November 5. Net **wheat export sales** were 0.35 mmt, up 89 percent from the week ending November 5.

Rail

U.S. Class I railroads originated 29,416 **grain carloads** during the week ending November 7. This was a 1-percent increase from the previous week, unchanged from last year, and 6 percent more than the 3-year average.

Average November **shuttle secondary railcar bids/offers** (per car) were $325 below tariff for the week ending November 12. This was $142 less than last week and $638 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $100 above tariff. This was $50 less than last week and $75 more than this week last year.

Barge

For the week ending November 14, **barged grain movements** totaled 761,500 tons. This was 10 percent less than the previous week and 2 percent less than the same week last year.

For the week ending November 14, 507 **barges moved down river**, 68 fewer than the previous week. There were 858 grain barges unloaded in the New Orleans region, up 9 percent from the previous week.

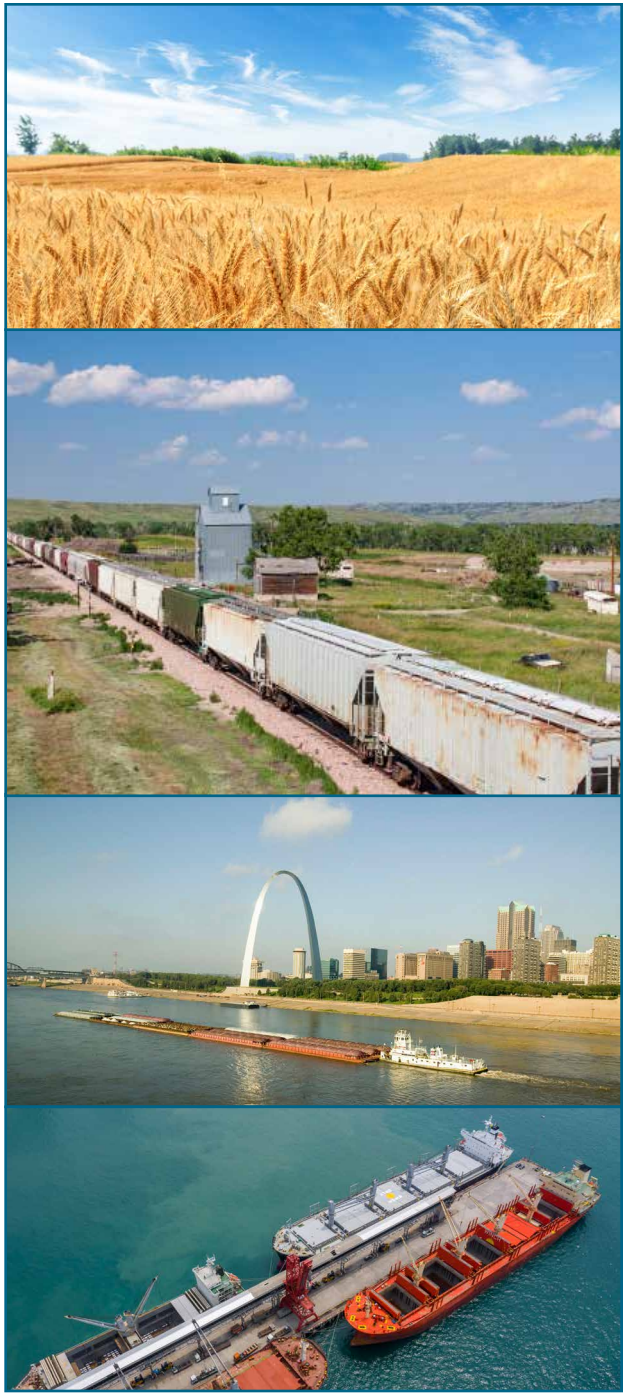
Ocean

For the week ending November 12, 27 **oceangoing grain vessels** were loaded in the Gulf—8 percent more than the same period last year. Within the next 10 days (starting November 13), 46 vessels were expected to be loaded—12 percent more than the same period last year.

As of November 12, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $72.75, unchanged from the previous week. The rate from the Pacific Northwest to Japan was $39.50 per mt, unchanged from the previous week.

Fuel

For the week ending November 16, the **U.S. average diesel fuel price** decreased 19.0 cents from the previous week to $5.937 per gallon, 206.9 cents above the same week last year.



Third-Quarter 2026 Wheat Total Landed Costs

From second to third quarter 2026 (quarter to quarter), transportation costs for shipping wheat from Kansas and North Dakota to Japan increased via both the Pacific Northwest (PNW routes) and the U.S. Gulf (Gulf routes). From third quarter 2025 to third quarter 2026 (year to year), transportation costs rose for all routes, because of increases in truck, rail, and ocean freight rates. Both quarter to quarter and year to year, total landed costs (farm values plus transportation costs) were up for all routes, because of both higher farm values and higher transportation costs (tables 1 and 2).

Transportation Costs

Quarter to Quarter. Quarter to quarter, PNW-route transportation costs for shipping wheat rose 3 percent for routes originating from Kansas and rose 4 percent for routes originating from North Dakota. Gulf-route transportation costs were up 4 percent from Kansas and up 6 percent from North Dakota.

Year to Year. Year to year, PNW-route transportation costs rose 13 percent from Kansas and rose 17 percent from North Dakota. Gulf-route transportation costs were up 22 percent from Kansas and up 24 percent from North Dakota.

Ocean Freight Rates. For PNW routes, ocean freight rates were up 1 percent quarter to quarter and up 26 percent year to year. For Gulf routes, rates rose 5 percent quarter to quarter and rose 34 percent year to year. Ocean freight

Table 1. Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through PNW

Mode	Kansas					North Dakota				
	2025 3rd qtr	2026 2nd qtr	2026 3rd qtr	Year-to-year change	Quarterly change	2025 3rd qtr	2026 2nd qtr	2026 3rd qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	6.98	7.27	7.55	8.17	3.85	17.35	18.71	21.44	23.57	14.59
Rail	59.04	64.00	66.06	11.89	3.22	59.32	63.60	65.41	10.27	2.85
Ocean vessel	29.08	36.25	36.67	26.10	1.16	29.08	36.25	36.67	26.10	1.16
Transportation costs	95.10	107.52	110.28	13.06	2.57	105.75	118.56	123.52	16.80	4.18
Farm value	164.73	209.81	243.12	47.59	15.88	194.62	204.91	225.85	16.05	10.22
Total landed cost	259.83	317.33	353.40	22.13	11.37	300.37	323.47	349.37	16.31	8.01
Transport % of landed cost	36.60	33.88	31.21	-7.43	-7.90	35.21	36.65	35.36	0.42	-3.54

Table 2. Quarterly rate comparisons for shipping Kansas and North Dakota wheat to Japan through U.S. Gulf

Mode	Kansas					North Dakota				
	2025 3rd qtr	2026 2nd qtr	2026 3rd qtr	Year-to-year change	Quarterly change	2025 3rd qtr	2026 2nd qtr	2026 3rd qtr	Year-to-year change	Quarterly change
	$/metric ton					$/metric ton				
Truck	6.98	7.27	7.55	8.17	3.85	17.35	18.71	21.44	23.57	14.59
Rail	41.04	43.46	44.43	8.26	2.23	57.09	62.25	64.96	13.79	4.35
Ocean vessel	54.36	69.27	72.76	33.85	5.04	54.36	69.27	72.76	33.85	5.04
Transportation costs	102.38	120.00	124.74	21.84	3.95	128.80	150.23	159.16	23.57	5.94
Farm value	164.73	209.81	243.12	47.59	15.88	194.62	204.91	225.85	16.05	10.22
Total landed cost	267.11	329.81	367.86	37.72	11.54	323.42	355.14	385.01	19.04	8.41
Transport % of landed cost	38.33	36.38	33.91	-11.53	-6.80	39.82	42.30	41.34	3.80	-2.28

Note: Rail tariff rates include fuel surcharges and revisions for heavy-axle railcars and shuttle trains. The rail tariff rate is a base price of rail freight rates, but during periods of high rail demand or car shortages, high auction and secondary market rates could exceed the base rail tariffs per car. USDA, National Agricultural Statistics Service is the source for wheat prices for North Dakota (mainly hard red spring) and Kansas (mainly hard red winter). qtr. = quarter; yr. = year.
Source: USDA, Agricultural Marketing Service.

rates for dry bulk commodities rose during third quarter 2026 because of strong bulk demand, driven by Chinese imports of iron ore and bauxite, Pacific coal shipments, and grain exports from the United States and South America. Further spurring the ocean rate increase, bunker fuel costs rose and vessel supply tightened, as draft and transit restrictions at the Panama Canal prompted vessels to reroute around Africa (***Grain Transportation Report* (GTR), October 15, 2026**).

Rail Freight Rates. Quarter to quarter, PNW rail rates rose 3 percent each from Kansas and North Dakota. Year to year, PNW rail rates rose 12 percent from Kansas and rose 10 percent from North Dakota.

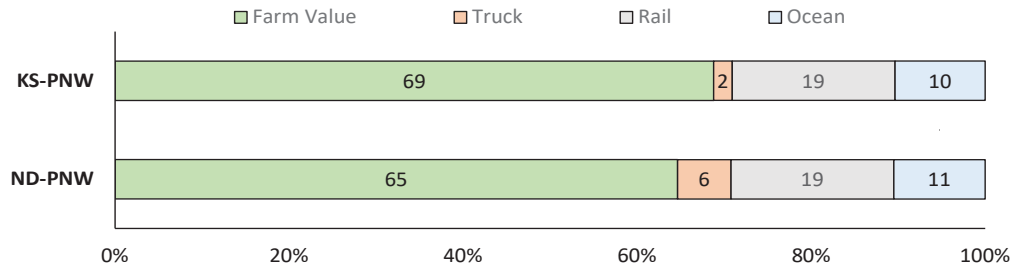
Quarter to quarter, Gulf rail rates rose 2 percent from Kansas and rose 4 percent from North Dakota, while year to year, Gulf rail rates rose 8 percent from Kansas and rose 14 percent from North Dakota.

Rail rates rose during the third quarter mainly because rail fuel surcharges climbed with rising diesel prices. Further driving up rail rates, tariff rates (the base rates) increased for Northern Plains wheat in August (**GTR, October 22, 2026**).

Truck Freight Rates. From Kansas, truck rates rose 4 percent quarter to quarter and rose 8 percent year to year. From North Dakota, truck rates rose 15 percent quarter to quarter and rose 24 percent year to year.

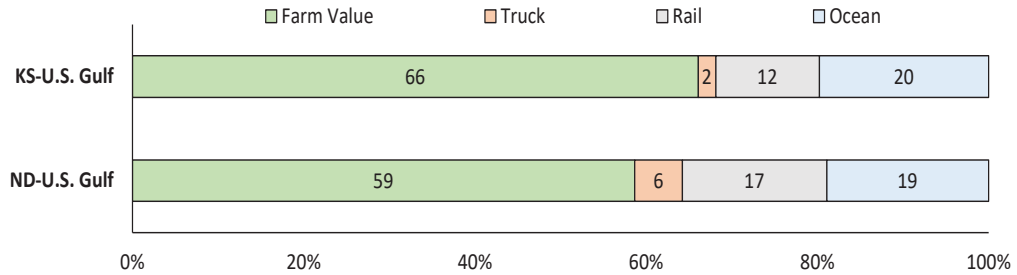
Truck rates rose during the third quarter because U.S. diesel prices climbed in August and September to a record $6.529 per gallon for the week ending September 21. Diesel prices spiked amid volatile oil prices tied to disruptions in the Strait of Hormuz (**GTR, October 22, 2026**).

Figure 1. Total landed costs for shipping wheat (Pacific Northwest) to Japan, third quarter 2026



Note: PNW = Pacific Northwest; KS = Kansas; ND = North Dakota.
Source: USDA, Agricultural Marketing Service.

Figure 2. Total landed costs for shipping wheat (U.S. Gulf) to Japan, third quarter 2026



Note: KS = Kansas; ND = North Dakota.
Source: USDA, Agricultural Marketing Service.

PNW Total Landed Costs

Third-quarter 2026 total landed costs for shipping wheat by PNW routes were $353 per metric ton (mt) from Kansas and $349 per mt from North Dakota (**table 1**). Quarter to quarter, PNW-route total landed costs were up 11 percent from Kansas and up 8 percent from North Dakota. Year to year, PNW-route total landed costs rose 22 percent from Kansas and rose 16 percent from North Dakota, because of higher transportation costs and higher farm values.

Third-quarter 2026 wheat farm values for both Kansas and North Dakota were well above last year. As a share of PNW-route total landed costs, third-quarter 2026 farm values were 69 percent from Kansas and 65 percent from North Dakota (fig. 1).

U.S. Gulf Total Landed Costs

Third-quarter 2026 total landed costs to ship wheat through the Gulf routes were $368 per mt from Kansas and $385 per mt from North Dakota. Quarter to quarter, Gulf-route total landed costs were up 12 percent from Kansas and up 8 percent from North Dakota. Year to year, total landed costs rose 38 percent from Kansas and rose 19 percent from North Dakota (**table 2**).

Given the notable rises in Kansas and North Dakota wheat farm values from third quarter 2025 to third quarter 2026, farm values' share of Gulf-route total landed costs also rose (as it did for the PNW routes). As a share of Gulf-route total landed costs, third-quarter 2026 farm values were 66 percent from Kansas and 59 percent from North Dakota (**fig. 2**).

U.S. Wheat Exports

According to **USDA/Foreign Agricultural Service's Global Agricultural Trade System data**, in third quarter 2026, the United States exported to Japan 0.6 mmt of wheat—up 26 percent quarter to quarter and up 8 percent year to year.

According to USDA's November ***World Agricultural Supply and Demand Estimates***, U.S. wheat exports for marketing year (MY) 2026/27 are projected to total 20.41 mmt—unchanged from the October projection and down 17 percent from the estimate for MY 2025/26.

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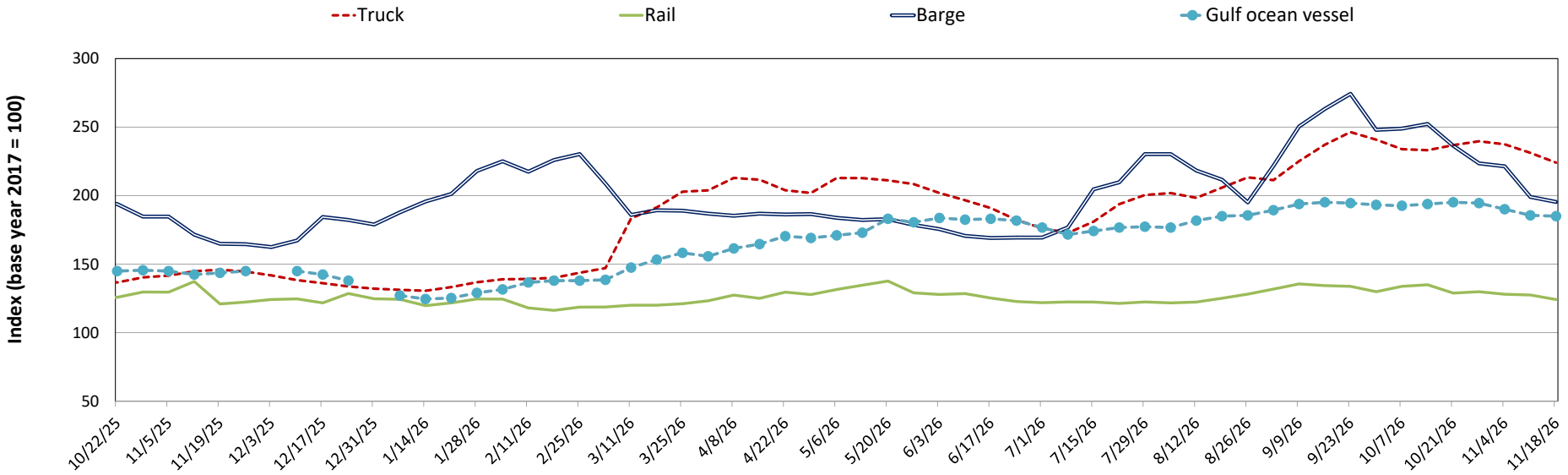
Grains are transported to the domestic and international markets via one or more of the following modes: truck, rail, barge, and oceangoing vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
11/18/26	224	124	195	185	188
11/11/26	231	127	199	186	188
11/19/25	146	121	165	144	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.

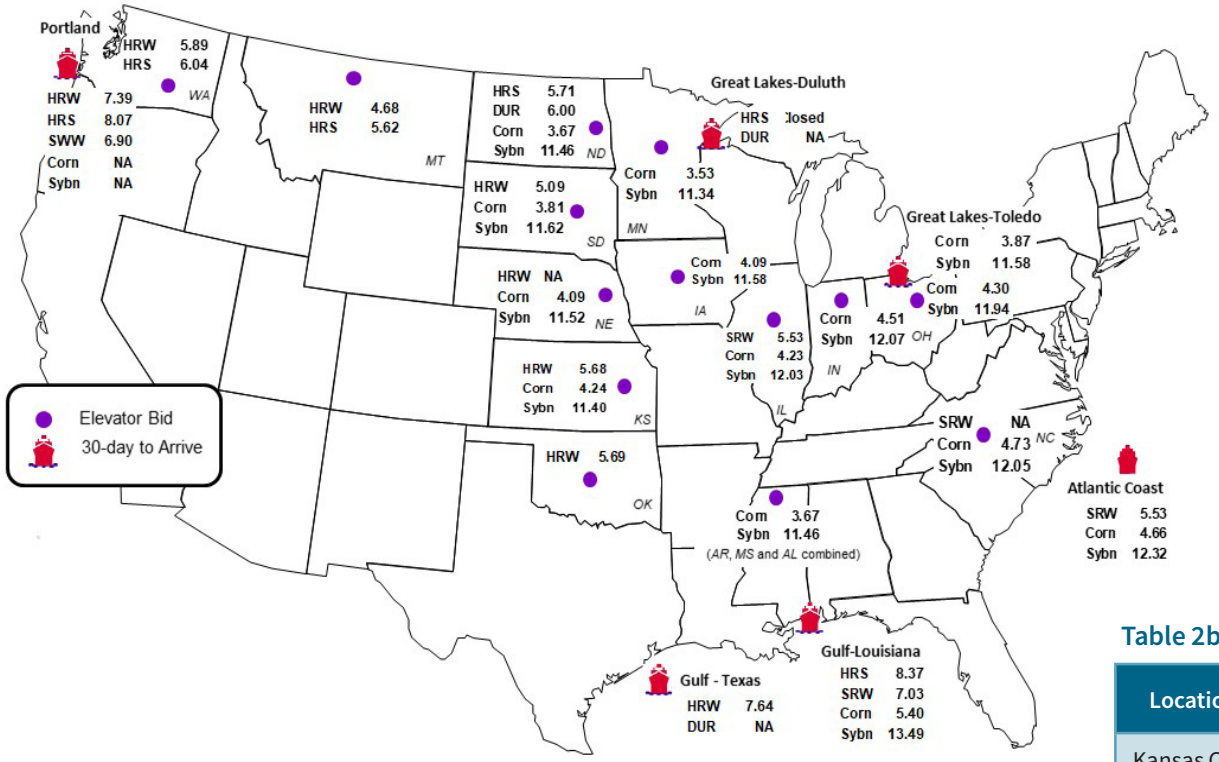
Figure 1. Grain transportation cost indicators as of week ending 11/18/26



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	11/13/2026	11/6/2026
Corn	IL–Gulf	-1.17	-1.20
Corn	NE–Gulf	-1.31	-1.33
Soybean	IA–Gulf	-1.91	-1.79
HRW	KS–Gulf	-1.96	-2.03
HRS	ND–Portland	-2.36	-2.37

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	11/13/2026	Week ago 11/06/2026	Year ago 11/14/2025
Kansas City	Wht	Dec	6.286	6.324	5.154
Minneapolis	Wht	Dec	6.268	6.160	5.648
Chicago	Wht	Dec	5.932	5.912	5.274
Chicago	Corn	Dec	4.452	4.414	4.302
Chicago	Sybn	Dec	12.312	11.936	11.244

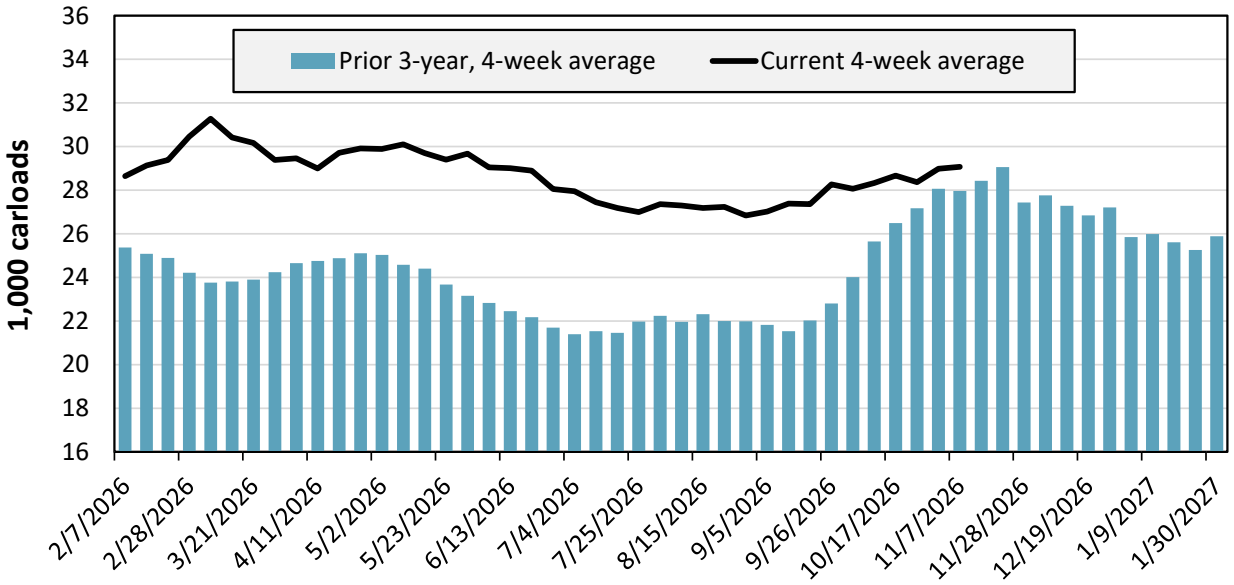
Sources: Chicago Mercantile Exchange (CME) Group Grain and *Oilseed Futures Report*.

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

For the week ending: 11/07/2026	East		West		Central U.S.		U.S. total
	CSX	NS	BNSF	UP	CPKC	CN	
This week	1,801	2,548	13,390	5,969	3,628	2,080	29,416
This week last year	1,921	2,650	12,777	6,943	2,851	2,207	29,349
2026 YTD	67,425	109,802	559,825	293,591	162,109	75,639	1,268,391
2025 YTD	69,881	119,683	506,454	263,302	130,028	64,838	1,154,186
2026 YTD as % of 2025 YTD	96	92	111	112	125	117	110
Last 4 weeks as % of 2025	98	83	98	106	112	105	100
Last 4 weeks as % of 3-yr. avg.	89	84	101	110	124	113	104
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 November 7, grain carloads were unchanged from the previous week, unchanged from last year, and up 4 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: 11/6/2026		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	29.4	43.4	28.4	18.3	12.2	12.5	24.0
	Average over last 4 weeks	32.5	40.4	30.3	18.2	10.3	21.1	25.5
	Average of same 4 weeks last year	31.2	22.4	16.1	16.3	8.5	31.9	21.1
Average grain unit train speeds (miles per hour)	This week	21.8	19.4	25.0	22.9	21.8	20.2	21.8
	Average over last 4 weeks	22.1	17.3	24.4	23.1	22.0	20.3	21.5
	Average of same 4 weeks last year	23.6	19.3	24.7	23.4	23.9	15.9	21.8

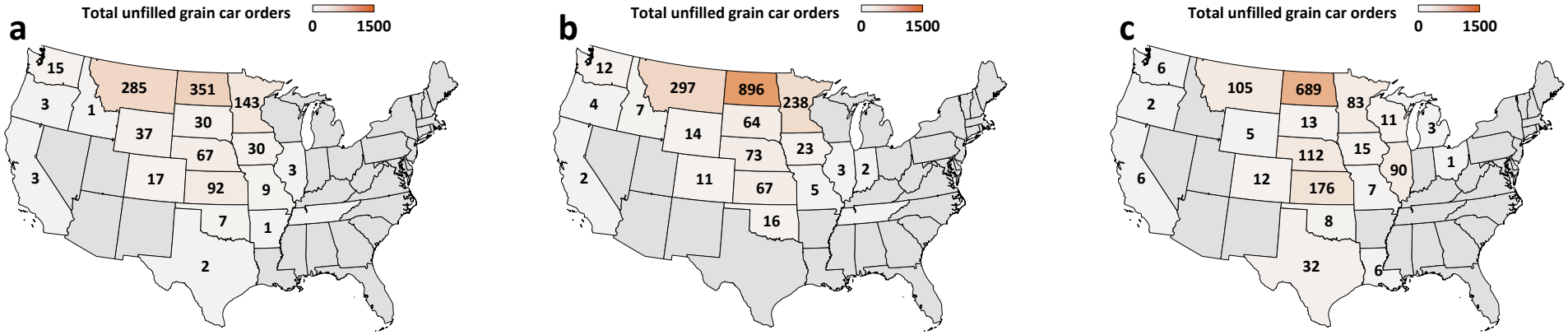
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

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

For the week ending: 11/6/2026		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	64	19	365	39	11	81	579
	Average over last 4 weeks	52	27	345	41	6	96	567
	Average of same 4 weeks last year	16	11	239	53	5	248	572
Average number of loaded grain cars not moved in over 48 hours	This week	109	397	752	43	10	85	1,396
	Average over last 4 weeks	73	356	703	37	9	167	1,345
	Average of same 4 weeks last year	15	173	357	45	12	578	1,179
Average number of grain unit trains held	This week	0	1	9	4	1	2	17
	Average over last 4 weeks	0	1	6	4	1	2	13
	Average of same 4 weeks last year	1	0	2	3	1	8	14
Total unfilled manifest grain car orders	This week	4	5	691	27	0	373	1,100
	Average over last 4 weeks	3	2	867	67	0	847	1,787
	Average of same 4 weeks last year	5	1	451	269	88	739	1,552

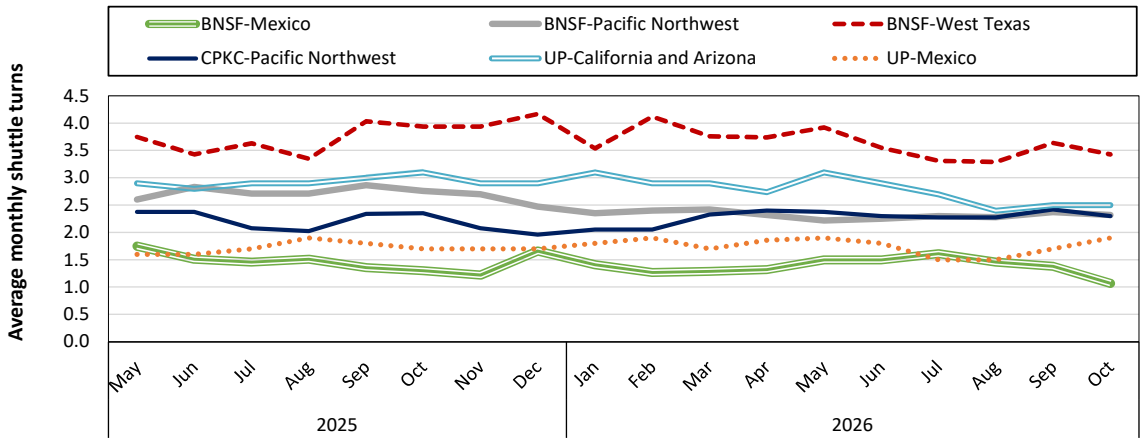
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC = Canadian Pacific Kansas City.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.
Source: Surface Transportation Board.

Figure 4. Unfilled manifest grain car orders by State for the week ending 11/6/2026 (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

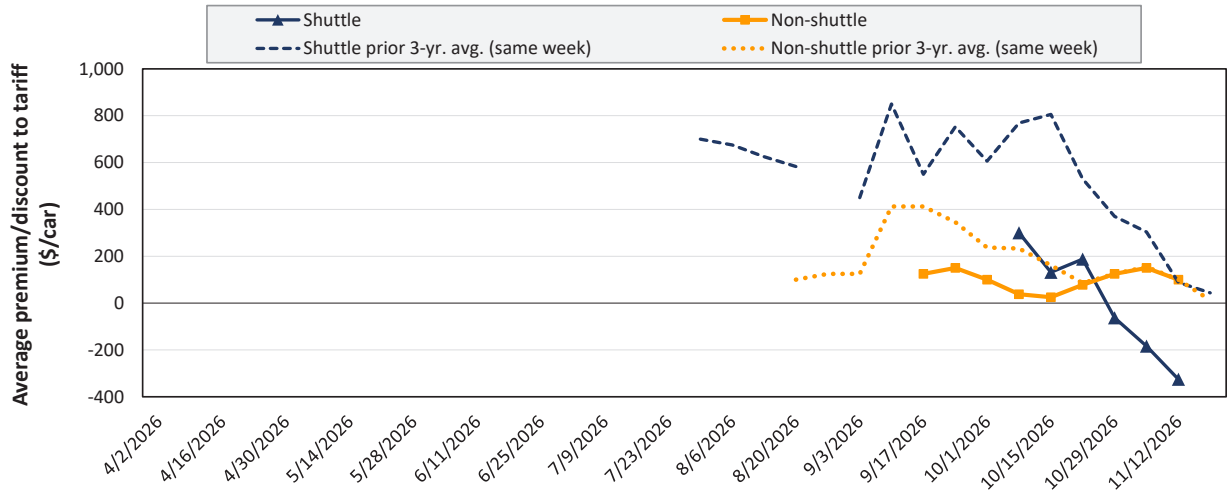


In October 2026, BNSF Railway's average monthly grain shuttle turns were 1.1 to Mexico, 2.3 to the Pacific Northwest, and 3.4 to West Texas. CPKC's shuttle turns averaged 2.3 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.5 to California and Arizona, and they averaged 1.9 to Mexico.

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

Railroads periodically auction guaranteed grain car service for an individual trip or a period of time (e.g., 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 November 2026



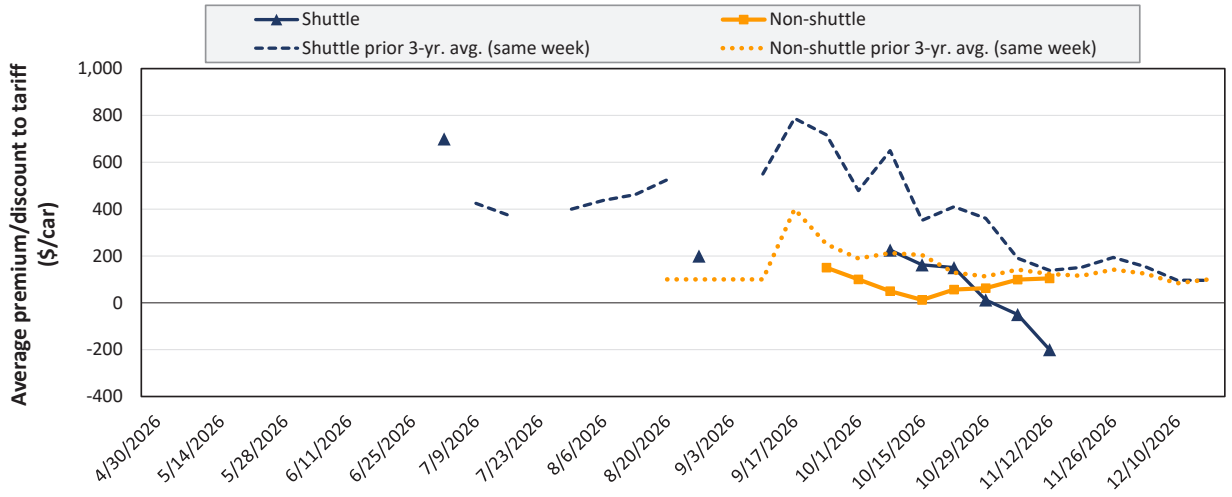
Average non-shuttle bids/offers fell $50 this week, and are $50 below the peak.

Average shuttle bids/offers fell $142 this week and are $625 below the peak.

11/12/2026	BNSF	UP
Non-Shuttle	$100	n/a
Shuttle	-$350	-$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 7. Secondary market bids/offers for railcars to be delivered in December 2026



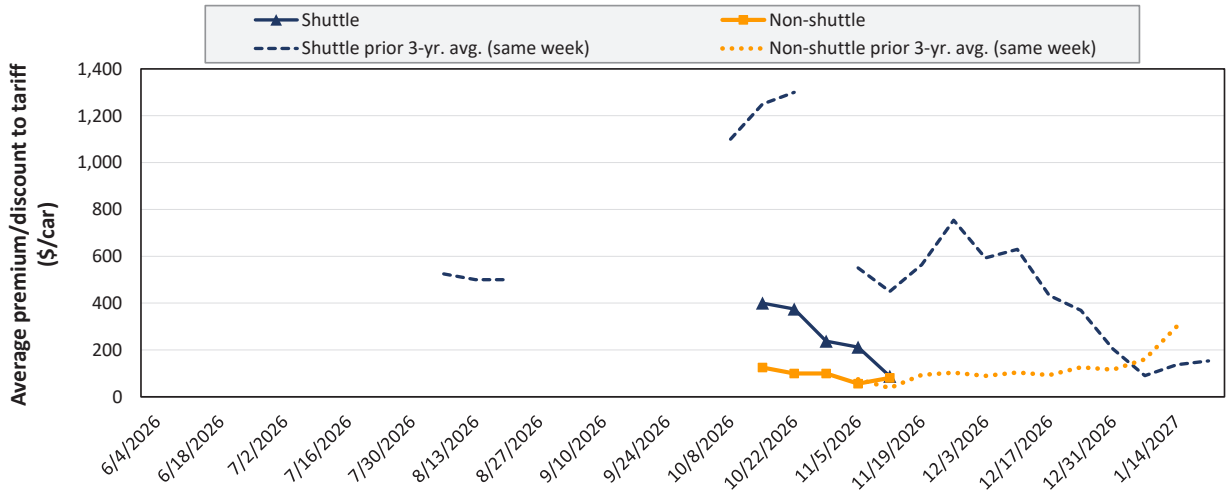
Average non-shuttle bids/offers rose $5 this week, and are $46 below the peak.

Average shuttle bids/offers fell $150 this week and are $900 below the peak.

11/12/2026	BNSF	UP
Non-Shuttle	$58	$150
Shuttle	-$250	-$150

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 January 2027



Average non-shuttle bids/offers rose $25 this week, and are $44 below the peak.

Average shuttle bids/offers fell $125 this week and are $313 below the peak.

11/12/2026	BNSF	UP
Non-Shuttle	$75	$88
Shuttle	$175	$0

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: 11/12/2026		Delivery period					
		Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Apr-27
Non-shuttle	BNSF	100	58	75	75	75	n/a
	Change from last week	50	16	75	75	75	n/a
	Change from same week 2025	75	33	38	n/a	n/a	n/a
	UP	n/a	150	88	88	88	n/a
	Change from last week	n/a	-6	-26	-26	-26	n/a
	Change from same week 2025	n/a	-88	n/a	n/a	n/a	n/a
Shuttle	BNSF	-350	-250	175	375	375	175
	Change from last week	-200	-150	-150	-25	-25	0
	Change from same week 2025	-800	-825	n/a	n/a	n/a	n/a
	UP	-300	-150	0	0	0	n/a
	Change from last week	-83	-150	-100	-100	-100	n/a
	Change from same week 2025	-475	-325	n/a	-225	n/a	n/a
	CPKC	0	150	200	200	200	n/a
	Change from last week	-100	n/a	200	200	200	n/a
	Change from same week 2025	-233	-225	n/a	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, November 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	$753	$6,737	$1.82	$66.90	13.2
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,466	$376	$4,842	$1.31	$48.09	11.3
	CPKC	Westby, MT	St. Louis, MO	Unit	$6,013	$1,338	$7,351	$1.99	$73.00	17.3
	UP	Yuma, AZ	Houston, TX	Manifest	$6,025	$1,153	$7,178	$1.94	$71.28	10.8
Hard red spring (HRS)	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$5,029	$436	$5,465	$1.48	$54.27	12.1
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,365	$1,049	$7,414	$2.00	$73.62	16.5
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$3,040	$203	$3,243	$0.88	$32.20	12.0
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,882	$1,091	$6,973	$1.88	$69.25	18.5
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,963	$924	$6,887	$1.86	$68.39	15.5
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,562	$766	$6,328	$1.71	$62.84	14.7
	CPKC	Minot, ND	Kalama, WA	Unit	$5,448	$1,185	$6,633	$1.79	$65.86	15.9
	CPKC	Nekoma, ND	Chicago, IL	Manifest	$5,255	$712	$5,967	$1.61	$59.25	12.9
Hard red winter (HRW)	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$397	$3,797	$1.03	$37.70	9.6
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,400	$486	$3,886	$1.05	$38.59	6.3
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$1,310	$7,110	$1.92	$70.61	18.7
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,600	$925	$6,525	$1.76	$64.80	11.8
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$671	$4,871	$1.32	$48.37	13.7
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$693	$4,693	$1.27	$46.60	15.1
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$571	$4,071	$1.10	$40.43	13.5
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$389	$4,089	$1.11	$40.61	8.7
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$621	$4,521	$1.22	$44.90	14.1
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$977	$5,502	$1.49	$54.64	12.1
	UP	Goodland, KS	Kansas City, MO	Manifest	$5,067	$365	$5,432	$1.47	$53.95	6.3
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$482	$4,257	$1.15	$42.28	7.4
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$643	$4,668	$1.26	$46.35	9.1
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,964	$471	$5,435	$1.47	$53.97	11.6
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,589	$595	$5,184	$1.40	$51.48	14.8
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,082	$293	$2,375	$0.64	$23.58	15.0
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	$9,039	$519	$9,558	$2.58	$94.92	11.0
	CSX	Chicago, IL	Albany, NY	Unit	$8,104	$519	$8,623	$2.33	$85.63	12.3
	CSX	Chicago, IL	Buffalo, NY	Manifest	$6,391	$332	$6,723	$1.82	$66.76	10.2
	CSX	Chicago, IL	Indiantown, FL	Manifest	$9,261	$885	$10,146	$2.74	$100.76	14.9

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, November 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	$679	$6,479	$1.63	$64.34	13.5
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,670	$1,168	$6,838	$1.72	$67.90	21.3
	BNSF	Edison, NE	Hanford, CA	Railroad	$5,660	$1,125	$6,785	$1.71	$67.38	20.3
	BNSF	Edison, NE	Hereford, TX	Railroad	$4,700	$479	$5,179	$1.31	$51.43	13.3
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,550	$1,290	$6,840	$1.73	$67.92	23.8
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,620	$574	$5,194	$1.31	$51.58	10.2
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,460	$468	$4,928	$1.24	$48.94	13.7
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,200	$721	$4,921	$1.24	$48.87	20.2
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,630	$1,016	$6,646	$1.68	$65.99	19.3
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,630	$1,151	$6,781	$1.71	$67.34	21.2
	CN	Gibson City, IL	Reserve, LA	Private	$2,356	$904	$3,260	$0.82	$32.38	24.0
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,736	$904	$3,640	$0.92	$36.15	21.0
	CPKC	Delhi, LA	Morton, MS	Railroad	$1,412	$124	$1,536	$0.39	$15.25	10.4
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,272	$1,362	$6,634	$1.67	$65.88	19.8
	CPKC	Glenwood, MN	Boardman, OR	Railroad	$5,513	$1,311	$6,824	$1.72	$67.76	14.0
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$6,600	$453	$7,053	$1.78	$70.04	13.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,766	$500	$7,266	$1.83	$72.15	13.9
	CSX	Olney, IL	Fairmount, GA	Railroad	$5,191	$320	$5,511	$1.39	$54.73	12.7
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,160	$580	$4,740	$1.20	$47.07	13.9
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,080	$1,320	$7,400	$1.87	$73.49	16.1
	UP	Mead, NE	Keyes, CA	Railroad	$6,240	$1,459	$7,699	$1.94	$76.46	16.9
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,080	$600	$5,680	$1.43	$56.40	11.6
	UP	Sloan, IA	Burley, ID	Railroad	$5,760	$988	$6,748	$1.70	$67.01	13.9
	UP	Sterling, IL	Nashville, AR	Railroad	$4,300	$607	$4,907	$1.24	$48.73	13.8
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,255	$1,065	$7,320	$1.98	$72.69	16.4
	BNSF	Argyle, MN	Texas Gulf (Houston, TX)	Railroad	$5,185	$1,014	$6,199	$1.68	$61.56	15.9
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,205	$1,032	$7,237	$1.96	$71.86	16.1
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$542	$3,942	$1.07	$39.14	13.1
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,305	$1,141	$7,446	$2.01	$73.95	17.3
	CN	Gibson City, IL	Reserve, LA	Private	$2,356	$904	$3,260	$0.88	$32.38	24.0
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,736	$904	$3,640	$0.98	$36.15	21.0
	CPKC	Enderlin, ND	Kalama, WA	Railroad	$5,985	$1,362	$7,347	$1.99	$72.96	17.1
	CPKC	Enderlin, ND	East St. Louis, IL	Railroad	$3,726	$1,030	$4,756	$1.29	$47.22	21.9
	CSX	Casey, IL	Mobile, AL	Private	$3,775	$499	$4,274	$1.16	$42.44	17.2
	CSX	Marion, OH	Chesapeake, VA	Private	$3,327	$486	$3,813	$1.03	$37.87	18.6
	UP	Canton, KS	Houston, TX	Railroad	$3,875	$627	$4,502	$1.22	$44.71	15.6
	UP	Cozad, NE	Kalama, WA	Railroad	$5,365	$1,312	$6,677	$1.80	$66.31	18.1
	UP	Cozad, NE	Houston, TX	Railroad	$4,235	$906	$5,141	$1.39	$51.05	17.7
	UP	Sloan, IA	Ama, LA	Railroad	$4,315	$1,034	$5,349	$1.45	$53.12	19.0

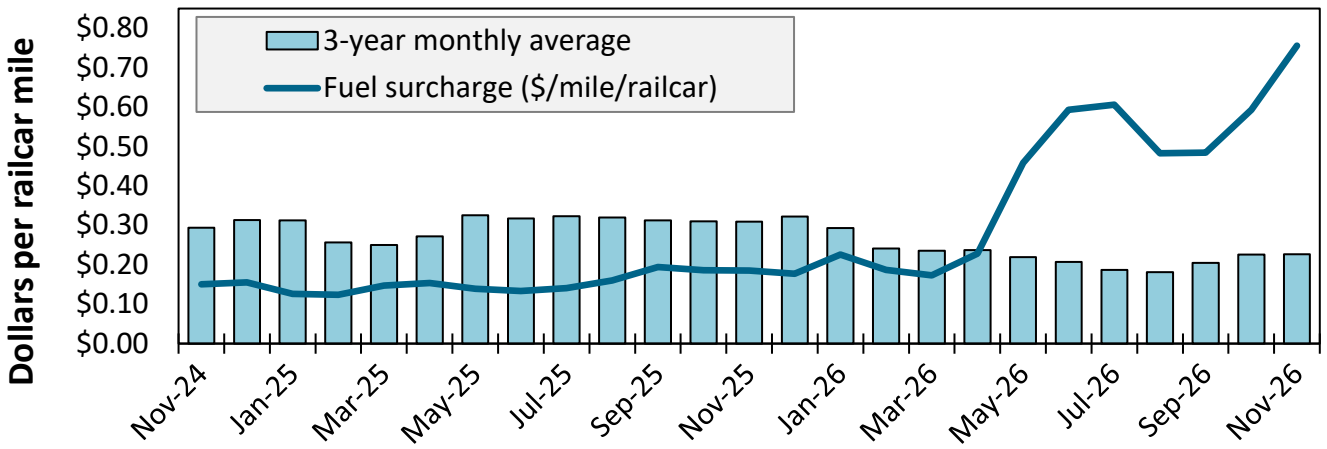
Note: Shuttle/unit trains are composed of 90+ grain cars that travel from a single origin to a single destination. All rates are for large covered hoppers (C-114), which each carry 111 short tons (100.7 metric tons). A bushel of corn weighs 56 pounds, and a bushel of soybeans weighs 60 pounds. Percentage 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, November 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	$782	$5,342	$1.34	$52.58	12.0
	BNSF	Superior, NE	El Paso, TX	Shuttle	$4,740	$615	$5,355	$1.34	$52.70	13.4
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	$5,080	$1,336	$6,416	$1.60	$63.15	14.4
	CPKC	Council Bluffs, IA	Laredo, TX	Non-shuttle	$5,750	$1,479	$7,229	$1.81	$71.15	17.9
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	$5,005	$1,276	$6,281	$1.57	$61.82	14.0
	CPKC	Marshall, MO	Laredo, TX	Non-shuttle	$5,225	$1,354	$6,579	$1.64	$64.75	14.9
	UP	Pontiac, IL	Eagle Pass, TX	Shuttle	$4,760	$1,073	$5,833	$1.46	$57.41	17.7
	UP	Sterling, IL	Eagle Pass, TX	Shuttle	$4,880	$1,114	$5,994	$1.50	$58.99	17.7
Soybeans	BNSF	Brunswick, MO	El Paso, TX	Shuttle	$3,585	$664	$4,249	$1.14	$41.82	-4.2
	BNSF	Hardin, MO	Eagle Pass, TX	Shuttle	$3,585	$661	$4,246	$1.14	$41.79	-4.2
	CPKC	Atchison, KS	Laredo, TX	Non-shuttle	$5,080	$1,336	$6,416	$1.72	$63.15	14.4
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	$5,005	$1,276	$6,281	$1.68	$61.82	14.0
	UP	Grand Island, NE	Eagle Pass, TX	Shuttle	$5,175	$1,021	$6,196	$1.66	$60.98	15.8
	UP	Roelyn, IA	Eagle Pass, TX	Shuttle	$5,260	$1,069	$6,329	$1.70	$62.29	16.0
Wheat	BNSF	FT Worth, TX	El Paso, TX	DET	$3,100	$479	$3,579	$0.96	$35.22	16.2
	BNSF	FT Worth, TX	El Paso, TX	Shuttle	$2,600	$479	$3,079	$0.82	$30.30	6.9
	CPKC	Kansas City, MO	Laredo, TX	Non-shuttle	$5,005	$1,276	$6,281	$1.68	$61.82	14.0
	UP	Great Bend, KS	Laredo, TX	Shuttle	$4,325	$766	$5,091	$1.36	$50.11	10.1
	UP	Wichita, KS	Laredo, TX	Shuttle	$4,065	$675	$4,740	$1.27	$46.65	9.5

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).

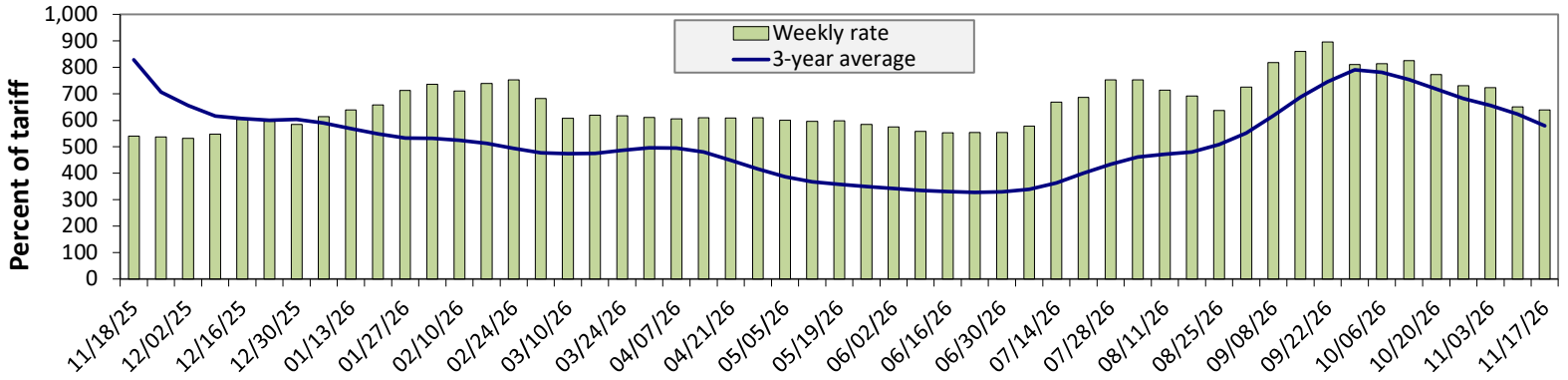
Figure 9. Average Class I railroad fuel surcharge, weighted by grain carloads



November 2026: $0.76/mile, up 17 cents from last month’s surcharge of $0.59/mile; up 57 cents from the November 2025 surcharge of $0.19/mile; and up 53 cents from the November prior 3-year average of $0.23/mile.

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

Figure 10. Illinois River barge freight rate



For the week ending November 17: 2 percent lower than the previous week; 19 percent higher than last year; and 10 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	11/17/2026	704	672	639	530	616	420
	11/10/2026	746	686	651	548	631	429
$/ton	11/17/2026	43.58	35.75	29.65	21.15	28.89	13.19
	11/10/2026	46.18	36.50	30.21	21.87	29.59	13.47
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	63	15	19	12	30	3
	3-year avg.	23	16	10	4	10	-5
Rate	December	n/a	675	651	528	606	424
	February	n/a	n/a	638	520	578	423

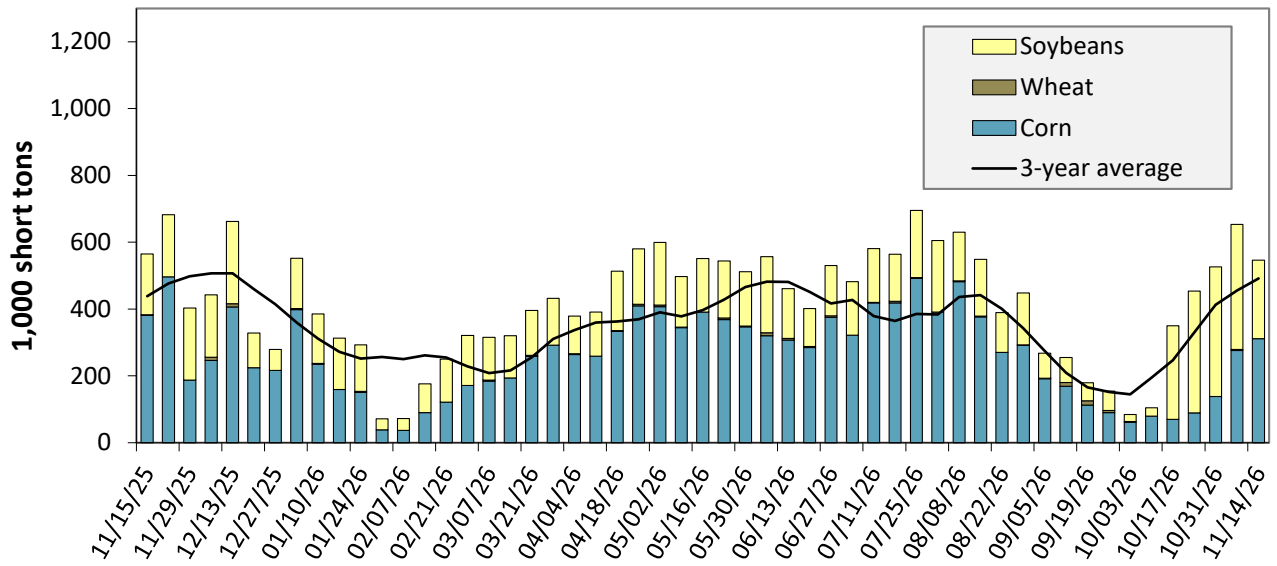
Note: Rate = percent of 1976 tariff benchmark index (1976 = 100 percent); 3-year avg. = 4-week moving average of the 3-year avg.; ton = 2,000 pounds; "n/a" = data not available. The per ton rate for Twin Cities assumes a base rate of $6.19 (Minneapolis, MN, to LaCrosse, WI). The per ton rate at Mid-Mississippi 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 November 14: 3 percent lower than last year and 11 percent higher than the 3-year average.

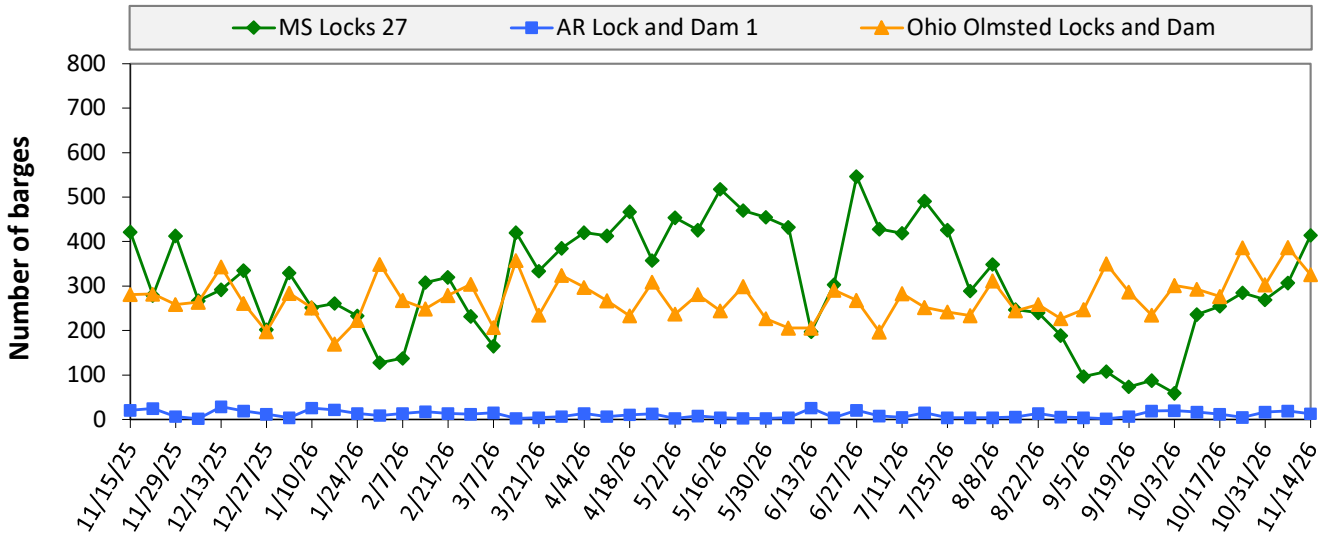
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 11/14/2026	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	154	0	108	0	262
Mississippi River (Winfield, MO (L25))	214	0	167	0	381
Mississippi River (Alton, IL (L26))	315	0	212	0	528
Mississippi River (Granite City, IL (L27))	311	0	235	0	546
Illinois River (La Grange)	91	0	87	0	178
Ohio River (Olmsted)	57	0	141	4	201
Arkansas River (L1)	0	0	14	0	14
Weekly total - 2026	369	0	389	4	762
Weekly total - 2025	454	10	315	0	779
2026 YTD	14,608	728	10,189	106	25,631
2025 YTD	17,432	1,150	9,454	144	28,179
2026 as % of 2025 YTD	84	63	108	74	91
Last 4 weeks as % of 2025	47	15	182	-	91
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.

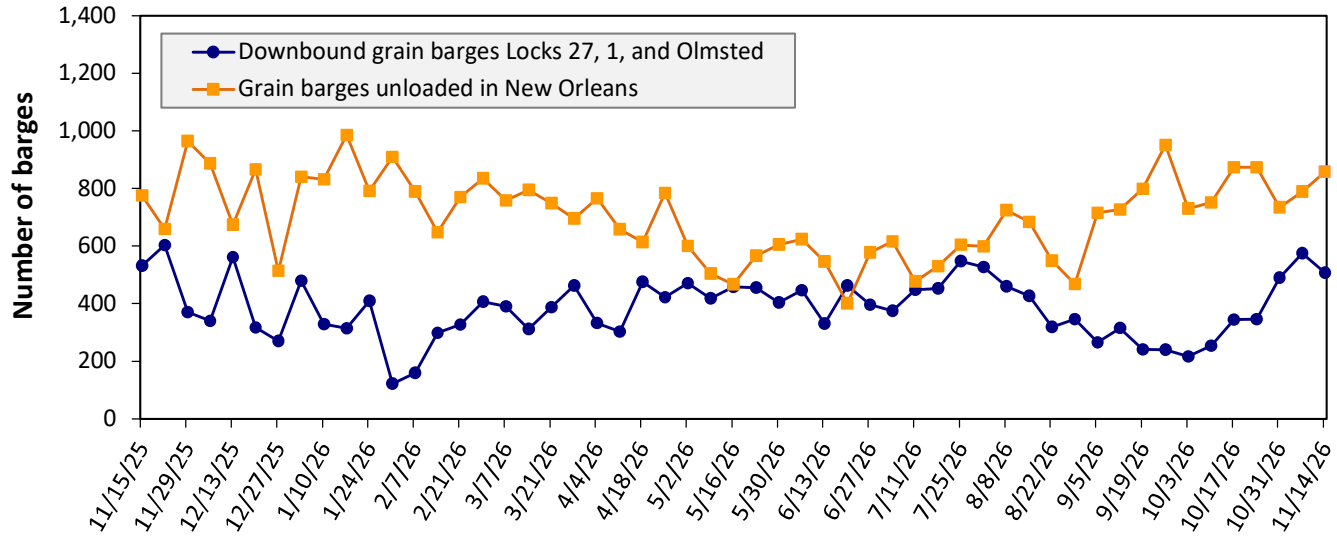
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending November 14: 753 barges transited the locks, 40 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 November 14: 507 barges moved down river, 68 fewer than the previous week; 858 grain barges unloaded in the New Orleans Region, 9 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	
		November 2026	October 2026	November 2025	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$26.99	$25.23	$23.01	17.3	20.4
	Central Ferry, WA/Almota, WA	$26.03	$24.27	$22.08	17.9	21.0
	Lyons Ferry, WA	$24.94	$23.18	$21.03	18.6	21.6
	Windust, WA/Lower Monumental, WA	$23.83	$22.07	$19.96	19.3	22.4
	Sheffler, WA	$23.80	$22.04	$19.93	19.4	22.4
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$22.52	$20.76	$18.69	20.4	23.4
	Port Kelly, WA/Wallula, WA	$22.28	$20.52	$18.46	20.6	23.6
	Umatilla, OR	$22.18	$20.42	$18.36	20.8	23.7
	Boardman, OR/Hogue Warner, OR	$21.90	$20.14	$18.09	21.0	24.0
	Arlington, OR/Roosevelt, WA	$21.73	$19.97	$17.93	21.1	24.1
	Biggs, OR	$20.30	$18.54	$16.55	22.6	25.5
	The Dalles, OR	$19.12	$17.36	$15.41	24.0	26.8

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)

October, 2026	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	248	0	248
Columbia River (Bonneville Lock and Dam (L1))	291	0	291
Monthly total 2025 (L1)	425	0	425
Monthly total 2025(L24)	382	0	382
2026 YTD(L1)	2,997	0	2,997
2026 YTD(L24)	2,441	0	2,441
2025 YTD(L1)	3,419	0	3,419
2025 YTD(L24)	3,007	0	3,007

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.

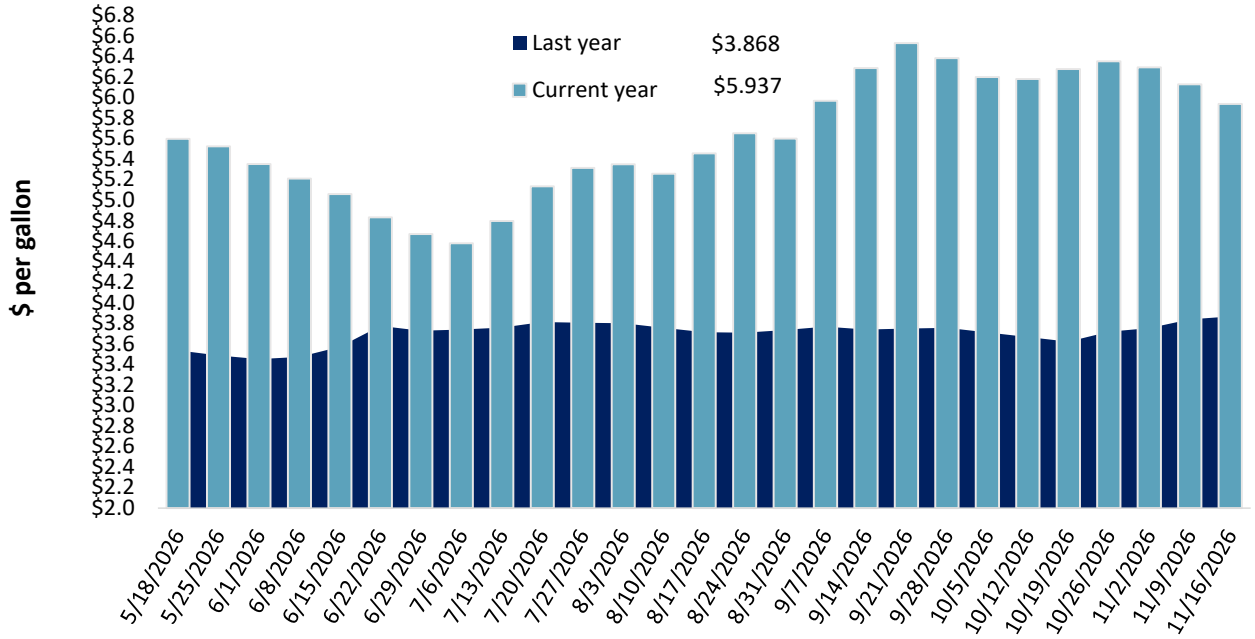
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 11/16/2026 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	5.782	-0.138	1.926
	New England	6.225	-0.124	2.204
	Central Atlantic	6.309	-0.103	2.310
	Lower Atlantic	5.541	-0.153	1.754
II	Midwest	5.967	-0.234	2.054
III	Gulf Coast	5.547	-0.194	2.057
IV	Rocky Mountain	6.011	-0.195	2.198
V	West Coast	6.948	-0.162	2.389
	West Coast less California	6.269	-0.160	2.089
	California	7.733	-0.164	2.737
Total	United States	5.937	-0.190	2.069

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 November 16, the U.S. average diesel fuel price decreased 19.0 cents from the previous week to $5.937 per gallon, 206.9 cents above the same week last year.

Note: On June 13, 2022, the Energy Information Administration implemented a new methodology to estimate weekly on-highway diesel fuel prices.
Source: U.S. Department of Energy, Energy Information Administration.

Table 14. U.S. export balances and cumulative exports (1,000 metric tons)

Grain Exports		Wheat						Corn	Soybeans	Total
		Hard red winter (HRW)	Soft red winter (SRW)	Hard red spring (HRS)	Soft white wheat (SWW)	Durum	All wheat			
Current unshipped (outstanding) export sales	For the week ending: 11/12/2026	801	523	1,385	1,275	180	4,164	16,323	17,148	37,635
	This week year ago	1,774	957	1,436	1,700	139	6,006	24,490	5,132	35,629
	Last 4 wks. as % of same period in prior marketing year	40	60	95	81	110	69	60	216	95
Current shipped (cumulative) export sales	Current MYTD	1,835	1,240	2,500	2,611	234	8,420	12,938	15,742	37,100
	Prior MYTD	4,900	1,688	3,070	2,243	211	12,111	16,230	1,874	30,215
	Current MYTD as % of prior MYTD	37	73	81	116	111	70	80	840	123
	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: 11/12/2026	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	12,285	14,534	-15	23,186
Japan	4,241	5,225	-19	13,485
Colombia	2,640	2,920	-10	7,639
Korea	2,103	3,109	-32	5,826
Spain	488	1,352	-64	2,730
Top 5 importers	21,269	25,788	-18	50,136
Total U.S. corn export sales	29,261	40,720	-28	69,791
% of YTD current month's export projection	35%	47%	-	-
Change from prior week	1,588	2,380	-	-
Top 5 importers' share of U.S. corn export sales	73%	63%	-	72%
USDA forecast November 2026	83,189	87,101	-4	-
Corn use for ethanol USDA forecast, November 2026	143,510	140,919	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: 11/12/2026	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	17,218	364	4630	19,737
Mexico	2,485	3,162	-21	4,939
Egypt	964	1,722	-44	3,402
Indonesia	637	742	-14	2,205
Japan	813	942	-14	2,128
Top 5 importers	22,117	6,932	219	32,410
Total U.S. soybean export sales	32,890	18,284	80	45,208
% of YTD current month's export projection	70%	44%	-	-
Change from prior week	1,501	636	-	-
Top 5 importers' share of U.S. soybean export sales	67%	38%	-	72%
USDA forecast, November 2026	46,811	41,232	14	-

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: 11/12/2026	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	2,755	2,912	-5	3,744
Philippines	1,918	1,982	-3	2,677
Japan	1,418	1,403	1	2,050
Korea	1,258	1,325	-5	1,888
Taiwan	591	684	-14	1,005
Nigeria	203	1,150	-82	878
China	NA	190	NA	863
Indonesia	563	930	-39	746
Thailand	471	514	-8	690
Vietnam	441	490	-10	581
Top 10 importers	9,618	11,580	-17	15,121
Total U.S. wheat export sales	12,584	18,117	-31	21,015
% of YTD current month's export projection	62%	73%	-	-
Change from prior week	345	850	-	-
Top 10 importers' share of U.S. wheat export sales	76%	64%	-	72%
USDA forecast, November 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.

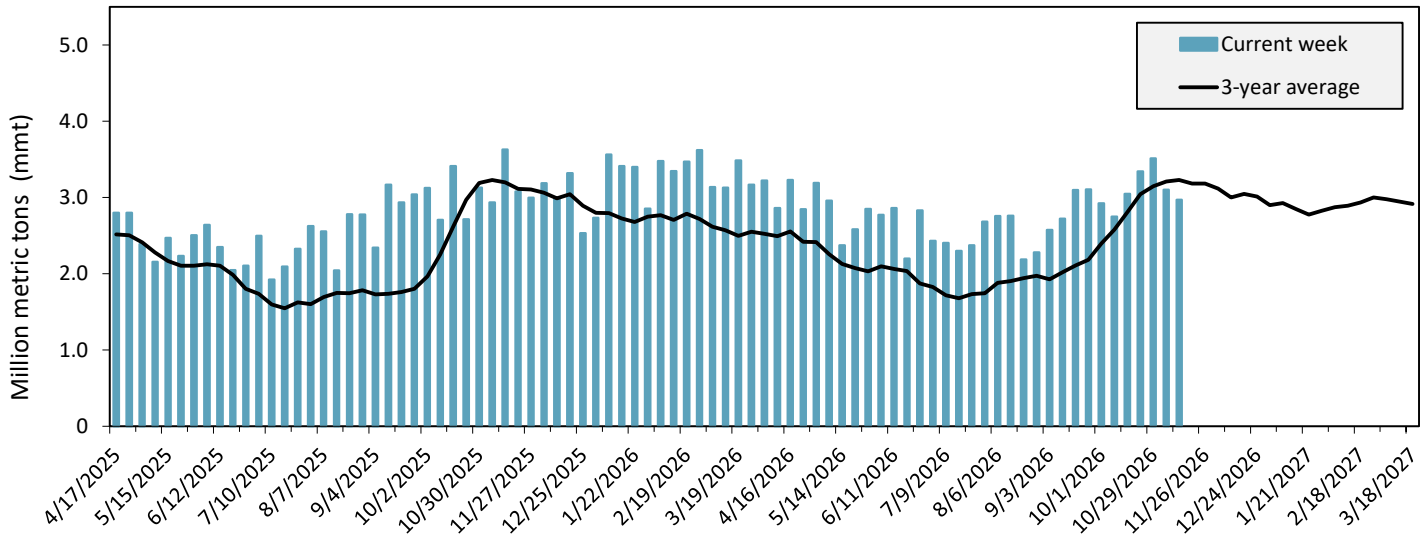
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 11/12/2026	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	77	158	49	21,307	19,972	107	10	29	24,214
	Soybeans	202	750	27	7,867	2,528	311	750	125	2,957
	Wheat	312	147	213	9,077	10,599	86	81	103	12,271
	All grain	591	1,055	56	38,565	33,291	116	105	99	39,721
Mississippi Gulf	Corn	406	350	116	31,305	32,656	96	61	88	37,115
	Soybeans	1,201	880	136	24,131	19,232	125	177	124	23,350
	Wheat	8	35	22	2,503	3,592	70	39	45	3,980
	All grain	1,615	1,265	128	58,065	55,521	105	116	110	64,484
Texas Gulf	Corn	104	0	n/a	1,590	532	299	754	411	590
	Soybeans	53	0	n/a	203	1,093	19	7	13	1,431
	Wheat	0	66	0	2,326	4,326	54	35	63	4,690
	All grain	157	66	240	7,697	6,673	115	27	38	7,774
Interior	Corn	273	373	73	14,320	13,280	108	91	103	15,546
	Soybeans	186	181	103	6,495	6,578	99	110	102	7,713
	Wheat	55	23	244	2,681	2,743	98	130	136	3,104
	All grain	518	579	90	23,927	23,038	104	100	104	26,888
Great Lakes	Corn	0	21	0	425	229	185	53	58	414
	Soybeans	0	0	n/a	132	62	211	211	68	63
	Wheat	16	5	306	317	286	111	81	60	434
	All grain	16	26	62	874	578	151	84	62	911
Atlantic	Corn	5	7	74	1,495	475	315	28	38	607
	Soybeans	66	103	64	1,083	764	142	204	115	1,085
	Wheat	0	0	n/a	22	81	28	0	0	81
	All grain	71	111	65	2,600	1,321	197	152	103	1,773
All Regions	Corn	866	908	95	70,442	67,145	105	52	83	78,486
	Soybeans	1,708	1,914	89	40,471	30,459	133	185	113	36,852
	Wheat	392	275	142	16,926	21,627	78	73	91	24,560
	All grain	2,969	3,100	96	132,288	120,622	110	102	100	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.

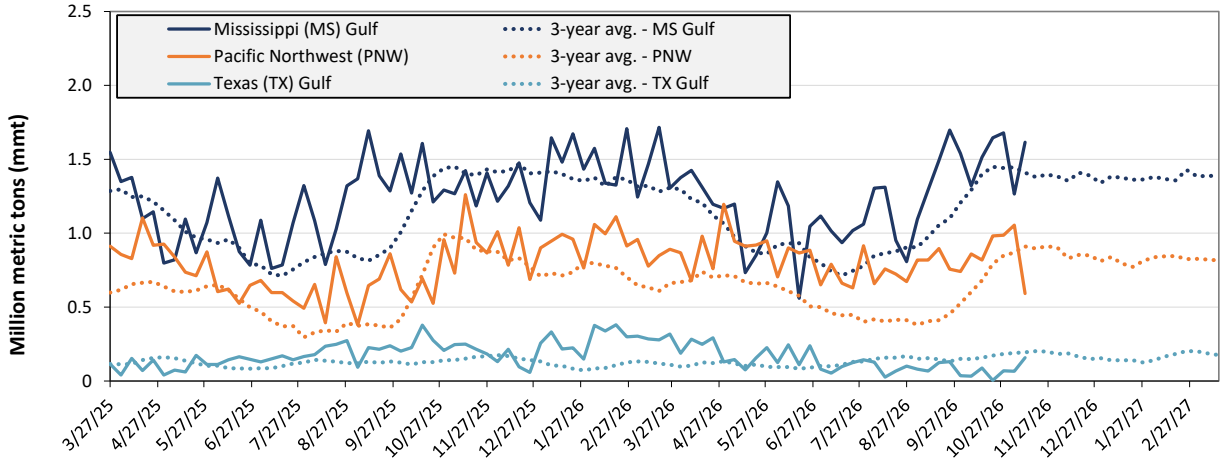
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending November 12: 3 mmt of grain inspected, down 4 percent from the previous week, down 17 percent from the same week last year, and down 8 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 11/12/26 inspections (mmt):
MS Gulf: 1.61
PNW: 0.59
TX Gulf: 0.16

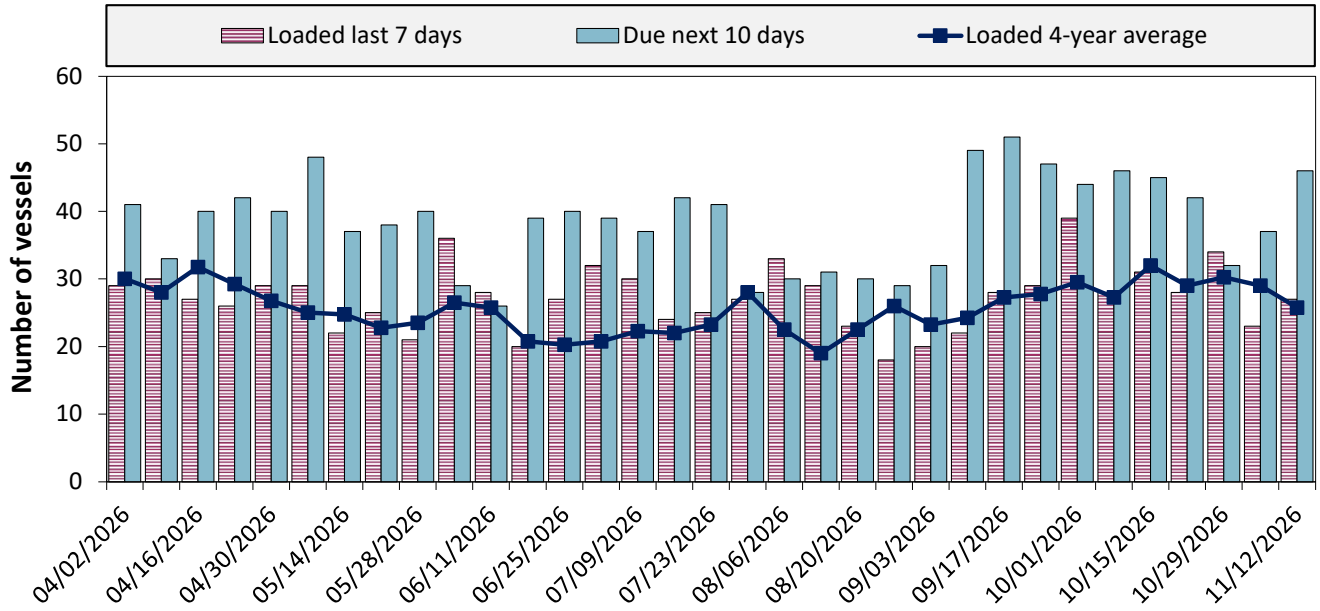
Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	up 28	up 140	up 33	down 44
Last year (same 7 days)	up 11	down 37	up 4	down 49
3-year average (4-week moving average)	up 15	down 19	up 10	down 35

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
11/12/2026	16	27	46	8
11/5/2026	22	23	37	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.

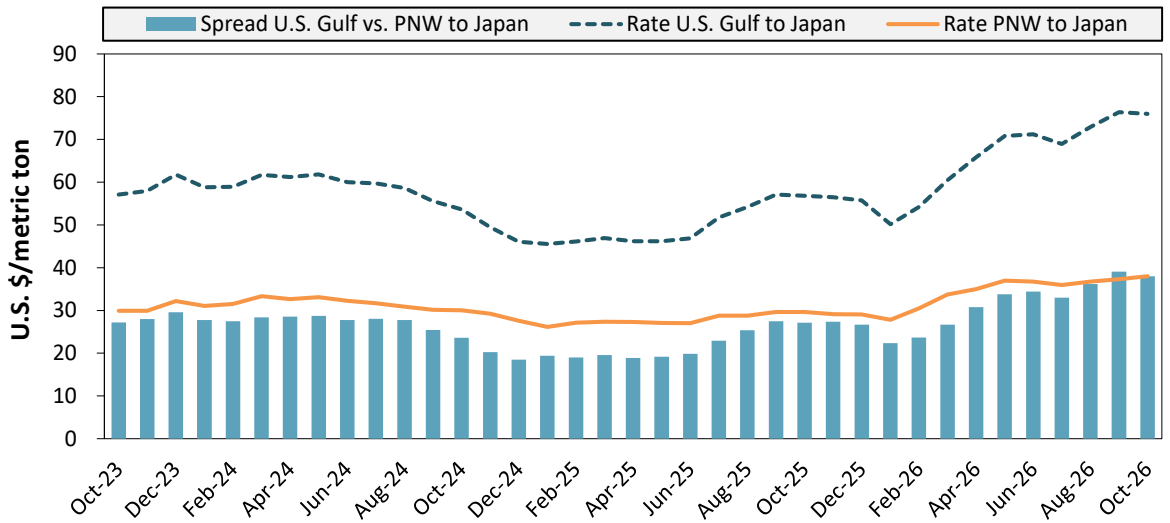
Figure 19. U.S. Gulf vessel loading activity



Week ending 11/12/26, number of vessels	Loaded	Due
Change from last year	8%	12%
Change from 4-year average	5%	-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



Ocean rates	U.S. Gulf	PNW	Spread
October 2026	$76.00	$38.00	$38.00
Change from October 2025	34%	28%	40%
Change from 4-year average	32%	21%	46%

Note: PNW = Pacific Northwest.
Source: O'Neil Commodity Consulting /World Perspectives, Inc.

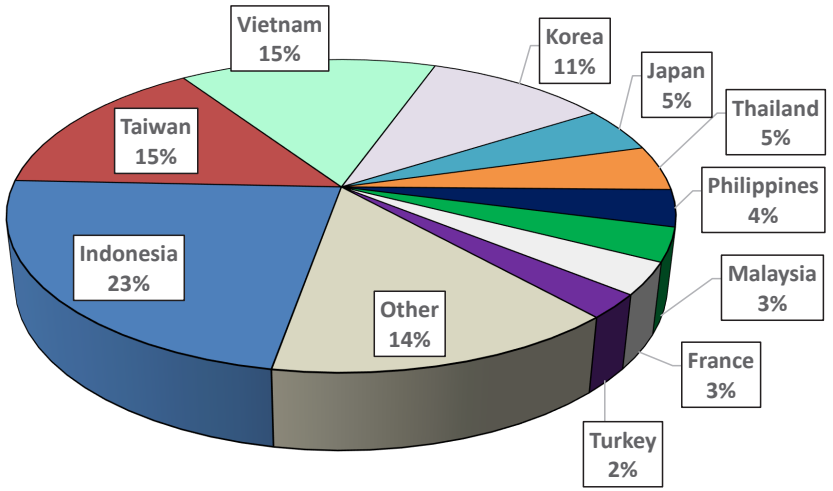
Table 20. Ocean freight rates for selected shipments, week ending 11/14/2026

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	China	Heavy grain	Oct 21, 2026	Nov 13/19, 2026	66,000	72.50
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
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
Quebec	N. China	Heavy grain	Nov 4, 2026	Nov 15/20, 2026	63,000	58.00
Vancouver	Vietnam	Heavy grain	Oct 9, 2026	Nov 15/20, 2026	65,000	37.00
Brazil	China	Heavy grain	Nov 2, 2026	Nov 15/21, 2026	70,000	47.50
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	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.

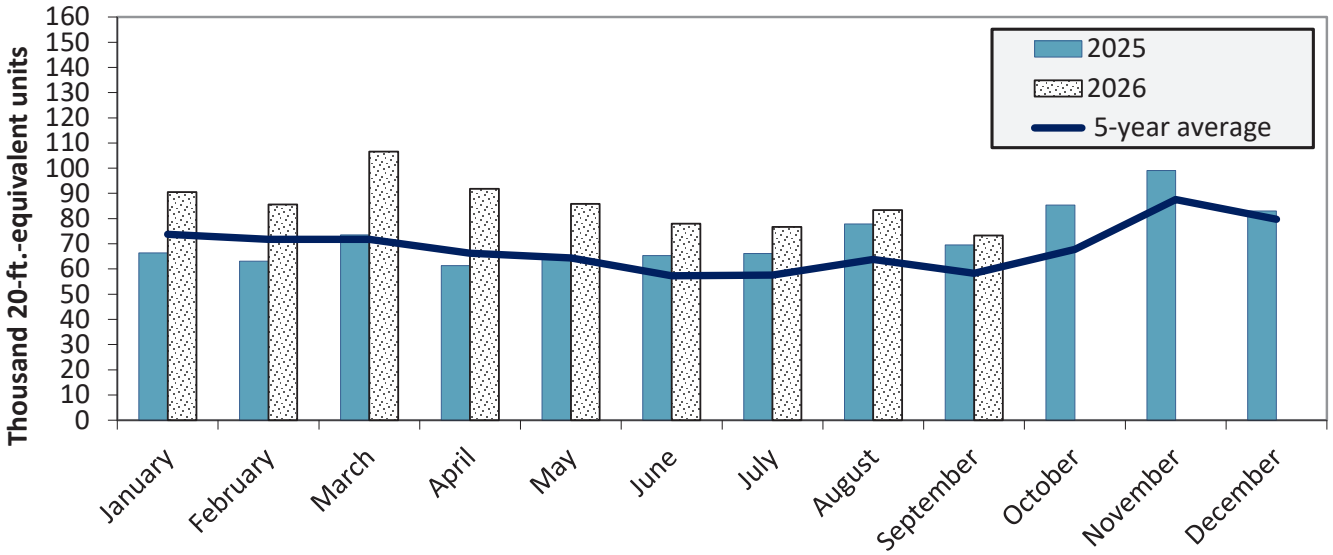
In 2025, containers were used to transport 11 percent of total U.S. waterborne grain exports. Approximately 48 percent of U.S. waterborne grain exports in 2025 went to Asia, of which 19 percent were moved in containers. Approximately 83 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-Sep 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 September 2026 were up 5.4 percent from last year and up 25.7 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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Additional Transportation Research and Analysis resources include the ***Grain Truck and Ocean Rate Advisory (GTOR)***, the ***Mexico Transport Cost Indicator Report***, and the ***Brazil Soybean Transportation Report***.

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