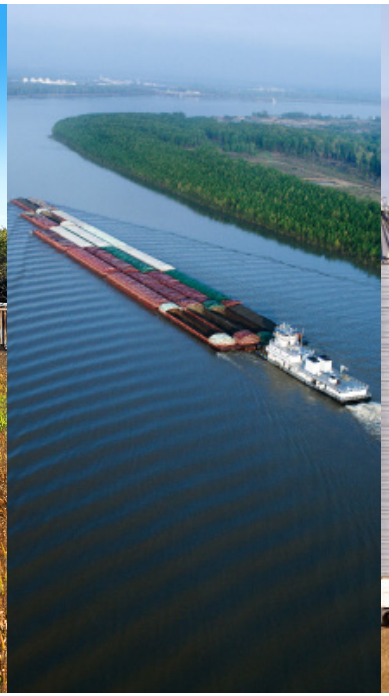
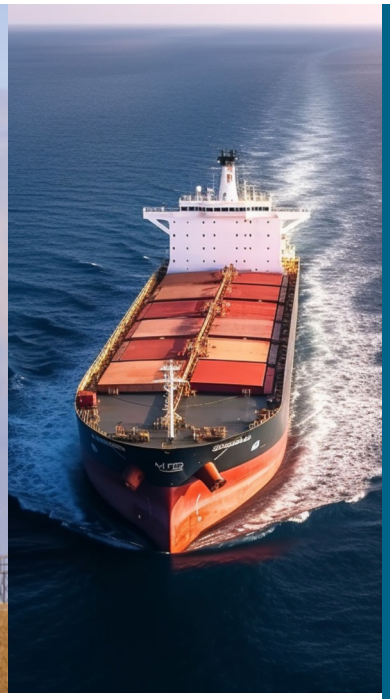
USDA Agricultural Marketing Service
U.S. DEPARTMENT OF AGRICULTURE



Grain Transportation Report

Contents

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CHS To Close Grain Terminal at Port of Duluth-Superior. By the end of August, CHS Inc. plans to close its export grain terminal at the Port of Duluth-Superior. Built in 1936, the CHS facility has about 18 million bushels of storage capacity and is served by BNSF Railway and Canadian Pacific Kansas City (CPKC). The CHS terminal is the port's **largest grain shipper**—handling between 60-70 percent of annual volumes.

Historically, the Port of Duluth-Superior was a key export terminal for durum and spring wheat grown in the Northern Plains. However, the port's grain volumes have been falling for decades, according to the ***Superior Telegram***, down from a high of 9.2 million metric tons in 1978 to 645,000 tons in 2022. Instead of shipping wheat from the Great Lakes, origins have shifted to deepwater ports (i.e., Texas Gulf and Pacific Northwest) that offer lower ocean freight rates.

Highlighting this general trend, CHS's decision to close the Superior terminal came just days after the Surface Transportation Board allowed CPKC to carry wheat from Northern Plains grain elevators to the Port of Houston, TX—where CHS also operates an export terminal (***Grain Transportation Report, July 10, 2025, first highlight***).

USDA/FAS Highlights Importance of Railroads to U.S.-Mexico Agricultural Trade. In a recent **report**, USDA's Foreign Agricultural Service (FAS) agricultural trade office in Monterrey, Mexico, explores the railroad agricultural trade between the United States and Mexico. In 2024, Mexico imported a record 33.6 million tons of U.S. corn, soybeans, and wheat. Based on USDA's Federal Grain Inspection Service (FGIS) **data** (**available on AgTransport**), about two-thirds of grain inspected for export to Mexico is shipped by rail and one-third, by maritime vessel.

USDA's Agricultural Marketing Service contributed a map to the report (on page 4) showing the origin-destination flows—*sized by volume*—of U.S. grain exports to Mexico in 2022. The top border crossings for U.S. grain exports to Mexico were Laredo, TX; Eagle Pass, TX; and El Paso, TX.

The report also gives a status update on Mexican rail infrastructure and discusses the factors contributing to cross-border shipping delays in 2023 and 2024. Looking ahead, the report indicates Mexico's grain imports—mostly from the United States—are poised for continued growth. Meeting this demand will hinge on the capacity and reliability of the U.S.-Mexico freight rail network.

ATRI Releases 2025 Analysis of the Operational Costs of Trucking Report. The American Transportation Research Institute (ATRI) recently **released** its 2025 Analysis of the Operational Costs of Trucking report. According to the analysis, the overall marginal costs of operating a truck were $2.260 per mile in 2024—down 0.4 percent from 2023 (year to year). With lower fuel costs excluded, marginal costs rose 3.6 percent year to year, to a record high for non-fuel operating costs: $1.779 per mile.

The major factors spurring rising costs were driver wages (+2.4 percent); truck and trailer payments (+8.3 percent, to a record-high 39 cents per mile); and driver benefits costs (+4.8 percent, to nearly 20 cents per mile). Non-driver staff was cut by 6.8 percent.

Carrier profitability weakened across all industry sectors, as average operating margins were below 2 percent in every sector besides less-than-truckload. Still, year-to-year improvements were recorded in average truck age, average dwell time per stop, and mileage between breakdowns.

STB Closes Information-Gathering Dockets on Revenue Adequacy. On **July 10, the Surface Transportation Board** (STB) **discontinued** its exploratory proceedings on revenue adequacy—Docket No. Ex Parte (EP) 722 and EP 766. Adequate revenues enable railroads to cover all operating costs (including depreciation and obsolescence); earn a reasonable return on invested capital; and secure funding for ongoing maintenance and network improvements.

EP 722 (opened April 2014) and EP 766 (opened September 2020) largely explored STB's revenue adequacy methodology. As determined by STB annually, Class I railroad revenue is deemed adequate if its rate of return (on net investment) at least matches the industry cost of capital. Railroad revenue adequacy has increased in recent years: from 2019 to 2023, railroads' return has exceeded the industry cost of capital by about 2 percent per year.

In the interest of administrative efficiency, STB discontinued both dockets to free resources for such priorities as streamlining procedures and reviewing competition policies. STB did not rule out revisiting revenue adequacy in the future.

*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 July 3, **unshipped balances** of corn and soybeans totaled 15.65 million metric tons (mmt), down 2 percent from last week and up 23 percent from the same time last year. The unshipped balance of wheat for marketing year (MY) 2025/26 was 6.01 mmt, up 2 percent from last week and up 8 percent from the same time last year.

Net **corn export sales** for MY 2024/25 were 1.26 mmt, up 137 percent from last week. Net **soybean export sales** were 0.50 mmt, up 9 percent from last week. Net **wheat export sales** for MY 2025/26 were 0.57 mmt, down 3 percent from last week.

Rail

U.S. Class I railroads originated 22,868 **grain carloads** during the week ending July 5. This was a 10-percent decrease from the previous week, 13 percent more than last year, and 13 percent more than the 3-year average.

Average July **shuttle secondary railcar bids/offers** (per car) were $50 above tariff for the week ending July 10. This was $18 less than last week and $300 lower than this week last year. Average non-shuttle secondary railcar bids/offers per car were $38 above tariff. This was $50 more than last week and $88 lower than this week last year.

Barge

For the week ending July 12, **barged grain movements** totaled 553,850 tons. This was 29 percent less than the previous week and 100 percent more than the same period last year.

For the week ending July 12, 352 grain barges **moved down river**—173 fewer than last week. There were 516 grain barges **unloaded** in the New Orleans region, 8 percent fewer than last week.

Ocean

For the week ending July 10, 23 **oceangoing grain vessels** were loaded in the Gulf—unchanged from the same period last year. Within the next 10 days (starting July 11), 35 vessels were expected to be loaded—13 percent fewer than the same period last year.

As of July 10, the rate for shipping a metric ton (mt) of grain from the U.S. Gulf to Japan was $48.75, up 1 percent from the previous week. The rate from the Pacific Northwest to Japan was $28.25 per mt, up 1 percent from the previous week.

Fuel

For the week ending July 14, the **U.S. average diesel fuel price** increased 1.9 cents from the previous week to $3.758 per gallon, 6.8 cents below the same week last year.

Grain Transportation Update: Volumes Above Average In Second Quarter

As was the case in the first quarter (*Grain Transportation Report (GTR), April 24, 2025*), demand for all modes of grain transportation in second quarter 2025 was robust. One of the key drivers was grain exports, as corn exports for marketing year (MY) 2024/25 approached record levels. Wheat exports have had a strong start to MY 2025/26.

In the second quarter, generally good navigation conditions on the Mississippi River System (MRS) and strong rail service raised MRS barge movements and Class I rail grain carloads, respectively, well above their prior 3-year average.[1]

Grain Disappearance Up in Western Corn Belt; Record Corn Exports Projected for MY 2024/25

According to USDA/National Agricultural Statistics Service's latest *Grain Stocks* report (released June 30), grain "disappearance"—the difference between June and March stocks of corn, soybeans, and wheat—was 4.8 billion bushels (bbu), up 3 percent from average. While corn and wheat disappearances were above average (5 and 4 percent, respectively), soybean disappearance was down 1 percent.

Grain disappearance rose notably in the western Corn Belt. By State, these were the changes in million bushels (mbu) and percentage changes from average (in parens): Nebraska, up 57 mbu (+13 percent); South Dakota, up 58 mbu (+26 percent); and North Dakota, up 64 mbu (+38 percent). The largest drop in disappearance occurred in Ohio—down 59 mbu (–23 percent). Tight grain stocks in the eastern Corn Belt, and more abundant supplies in the Western Corn Belt were reflected in grain prices (GTR fig. 2).

Over the same period (March-June), USDA's Federal Grain Inspection Service inspected the following amounts of grain (in million metric tons (mmt)), with changes from average in parens: 21.5 mmt of corn (+26 percent); 7.1 mmt of soybeans (+3 percent); and 6.3 mmt of wheat (+29 percent). By export region, inspections were as follows: 15.5 mmt of grain in the Mississippi Gulf (+5 percent); 11.5 mmt of grain in the PNW (+55 percent); 6.4 mmt in the Interior (+24 percent); and 1.2 mmt in the Texas Gulf (+52 percent).

Because corn exports outpaced March-June corn disappearance, USDA's July *World Agricultural Supply and Demand Estimates (WASDE) report* raised its MY 2024/25 corn export estimate by 100 million bushels (to 2.8 bbu) while lowering its corn feed and residual estimate by 75 million bushels (to 5.7 bbu). If realized, the MY 2024/25 corn exports total would be an all-time record.

Rail Volumes Exceed Average; CPKC Service Falters; HRW Wheat Rail Tariff Rates Fall

In second quarter 2025, rail grain carloads were up 13 percent from the same period in 2024 and up 11 percent from average (GTR fig. 3). Second-quarter grain carloads were up for all U.S. Class I railroads, except for CSX Transportation (CSX)—for which carloads were down 11 percent from average. CSX's lower carloads likely reflected lower grain stocks in the eastern Corn Belt (especially Ohio).

Although second-quarter grain carloads were up nationally, they varied significantly by State, as shown in the Surface Transportation Board's (STB) grain cars loaded and billed data. In the following States, grain carloads were down significantly from average: Minnesota (–9 percent); Indiana (–12 percent); and Ohio (–35 percent). Notable increases occurred in South Dakota (+23 percent); Nebraska (+29 percent); North Dakota (+31 percent); and Montana (+62 percent).

1 Unless otherwise noted, "average" (as referring to a historical average) specifically denotes the "prior 3-year average."

Rail service, in the second quarter, was generally strong across the Class I rail network. One notable exception to that strength involved Canadian Pacific Kansas City's (CPKC) computer system cutover in early-May.[2] The extension of CP's operations system throughout the network—replacing the KCS system—led to localized service problems in areas of the KCS legacy network (**GTR, June 19, 2025, first highlight**). In response to STB's request, CPKC submitted a **service action plan** on June 20 and continues to submit **weekly updates** on its progress.

According to STB's latest weekly service metrics (for the week ending July 4), CPKC's grain unit trains (in the United States) had the highest average origin dwell time (41 hours) and the slowest average speed (14 miles per hour) among the Class I railroads (**GTR table 4a**). Additionally, CPKC averaged 1,171 grain cars not moved in over 48 hours—more than half of the national average for the week (**GTR table 4b**).

Rail tariff rates for hard red winter (HRW) wheat fell significantly for several key corridors in June (**GTR table 6**). These rate reductions coincided with wheat inspections for export from the Texas Gulf that were up 399-percent from average for the past 4 weeks (**GTR table 18**). Hard red spring (HRS) wheat rates will be the next grain tariffs to renew—in August (**GTR, June 26, 2025**). A recent decision by STB has provided CPKC wheat shippers in the Northern Plains direct access to Texas Gulf export terminals (**GTR, July 10, 2025, first highlight**).

Barge Spot Rates and Movements Rise With Strong Corn Export Demand

After the first-quarter challenges of winter storms and high water, second-quarter barge navigation conditions were fairly smooth, except for delays from flooding on the Ohio River and lower Mississippi River in early April. For second quarter 2025, downbound barged grain shipments through the MRS locks totaled 8.9 million tons—up 38 percent from last year and up 11 percent from average (**GTR table 10**).

The rise from average was mainly driven by corn exports (up 27 percent from average). From first to second quarter 2025, corn's share of the total barged grain volumes rose from 55 percent to 72 percent. However, soybean and wheat barged volumes were below the 3-year average (down 12 percent and 31 percent, respectively). From first to second quarter, soybean's share of total barged volumes dropped 23 percent, and wheat's share dropped was unchanged.

In the second quarter, grain shipments were above average on the Illinois River and below average on the Ohio River. Downbound grain shipments through the LaGrange Lock and Dam on the Illinois River (Versailles, IL) were up 53 percent from average. Downbound grain shipments through the Olmsted Lock and Dam on the Ohio River (Olmsted, IL) were down 32 percent from average. Reflecting strong export demand, second-quarter spot rates were above average: the average barge rate at St. Louis, MO, ($13.55 per ton) was 17 percent higher than last year ($11.62 per ton) and 6 percent more than the average ($12.85 per ton).

Because of a rise in soft white wheat exports this year, 1.0 million tons of wheat moved through the locks of the Columbia-Snake River System (CSRS) in second quarter 2025—up 7 percent from second quarter 2024 (**GTR table 12**). Second-quarter 2024 barge rates at Lewiston, ID, averaged $21.58 per ton—up 3 percent from first quarter 2024, despite lower fuel costs (**GTR table 11**). After staying fairly steady in April and rising moderately in May, Illinois River 3-month forward rates jumped to an average $26 per ton for June—almost $6 higher than last year and over $2 higher than the average. The demand for forward barge service reflected the projected higher demand for U.S. exports in MY 2025/26.

Dry Bulk Ocean Freight Rates Remain Stable; Vessel Loadings Rise From Last Year

Second-quarter 2025 ocean freight rates for shipping bulk grain were mostly unchanged from the previous quarter, but down from second quarter 2024 and down from the 4-year average (**GTR fig. 20**). The second-quarter rate for shipping a metric ton (mt) of grain from

2 Canadian Pacific Kansas City (CPKC) formed in April 2023, as a result of the merger of Canadian Pacific Railway (CP) and Kansas City Southern Railway (KCS).

the U.S. Gulf to Japan averaged $46.42—unchanged from the previous quarter, down 24 percent from a year ago, and 28 percent below the prior 4-year average. The rate from the Pacific Northwest (PNW) averaged $27.12 per mt—up 1 percent from the previous quarter, down 17 percent from a year ago, and 19 percent below the 4-year average. The rate from the U.S. Gulf to Europe averaged $22.71, up 1 percent from the previous quarter, down 19 percent from a year ago, and 19 percent below the prior 4-year average. Ocean freight rates remained stable throughout second quarter of 2025, because of weak cargo demand and ample supply of vessels.

Vessel loadings in the second quarter were higher than last year—reflecting increased exports (GTR table 19). In the U.S. Gulf, an average of 27 oceangoing vessels were loaded per week, versus 28 vessels in the previous quarter and 23 vessels in second quarter 2024. In the PNW, an average of 14 vessels per week were loaded or waiting to load, versus 17 vessels in the previous quarter and 10 vessels in second quarter 2024. The prevailing global economic conditions and market uncertainties may affect future bulk-shipping demand and, in turn, ocean freight rates.

Diesel Prices for Trucking Fall in Second Quarter 2025

Second-quarter 2025 U.S. diesel prices averaged $3.56 per gallon—7 cents below the previous quarter and 30 cents below second quarter 2024 (GTR fig. 15). From the week ending April 14 to the week ending June 2, the U.S. average diesel price fell, before entering an upswing: from the week ending June 9 to the week ending July 14, the average diesel price rose 28.7 cents.

On July 5, OPEC+ announced it would raise production targets for August. Prior to that announcement, the Energy Information Administration's (EIA) July *Short-Term Energy Outlook* projected Brent Crude oil prices to average $69 per barrel in 2025, up $3 per barrel from EIA's June forecast, but still down $12 per barrel from 2024. EIA's increase from the June forecast was largely in response to geopolitical risk stemming from the Iran conflict, which has raised near-term prices. EIA projected the national diesel price will average $3.67 per gallon in third quarter 2025, up 23 cents from EIA's June forecast, and up 11 cents from the previous quarter. EIA further projects the U.S. diesel price will average $3.61 per gallon in 2025, up 9 cents from EIA's June forecast, but still down 15 cents from 2024's average price.

Looking Ahead: MY 2025/26 May Bring Record-High Corn Harvest and Shifts in Soybean Demand

According to the *July WASDE report*, in MY 2025/26, U.S. farmers are projected to harvest 398.9 mmt of corn; 118.0 mmt of soybeans; and 52.5 mmt of wheat. If realized, the MY 2025/26 corn harvest will result in a record-high crop—exceeding the previous record of 389.7 mmt harvested in MY 2023/24.

At 67.9 mmt, USDA's projection for MY 2025/26 corn exports is down slightly from the 69.9 mmt projected exports for MY 2024/25. As of July 3, unshipped balances for MY 2025/26 were 49 percent above last year, mainly because of strong sales to Mexico, which accounted for 64 percent of the unshipped balance (GTR table 15).

Owing to the strong pace of exports (since the wheat MY began in June), USDA raised its MY 2025/26 wheat export projection from 22.5 mmt in June to 23.1 mmt in July. As of July 3, the unshipped balance was 8 percent ahead of the same time last year (GTR table 17).

Following recent energy policy changes, USDA projects domestic soybean crushings will rise—to 69.1 mmt—to meet the demand for soybean oil use in biofuels production. Because of higher domestic demand and large global stocks, MY 2025/26 soybean exports are projected to be 47.5 mmt—down from 50.8 mmt in MY 2024/25. As of July 3, unshipped balances for MY 2025/26 were 17 percent above last year (GTR table 16). However, China—typically the largest buyer of U.S. soybeans—had yet to purchase U.S. soybeans for the new marketing year.

GTRContactUs@usda.gov

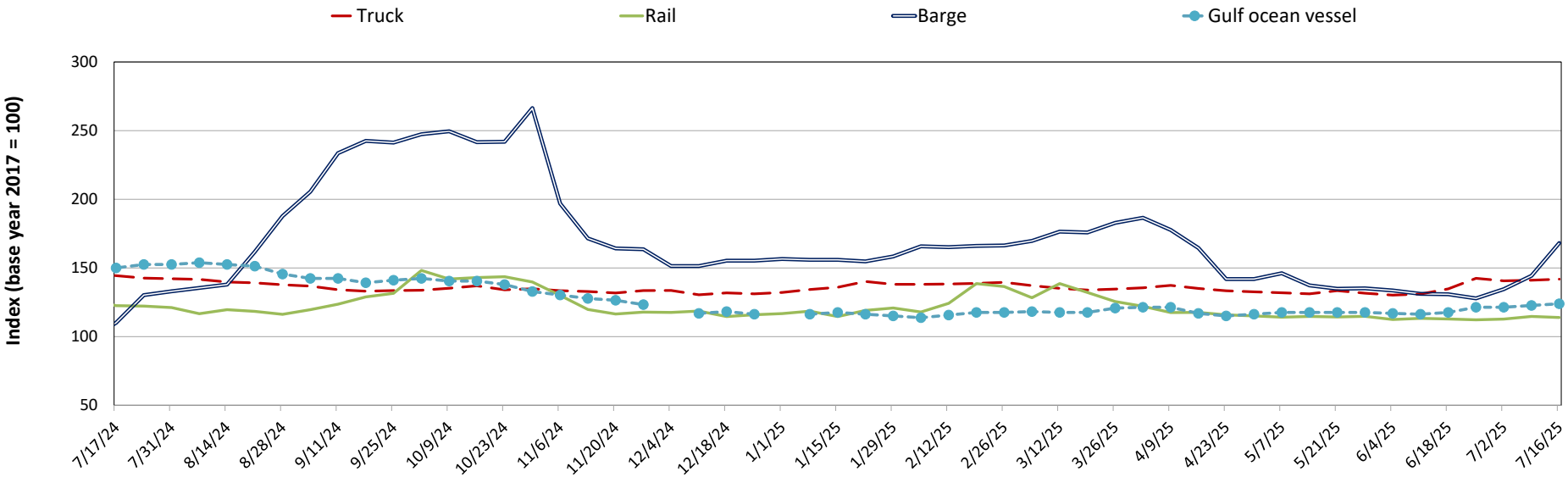
Grains are transported to the domestic and international markets via one or a combination of the following modes: truck, rail, barge and ocean-going vessel. Monitoring the cost of transportation for each mode is vital to the marketing decision making process.

Table 1. Grain transport cost indicators

For the week ending:	Truck	Rail	Barge	Ocean	
				Gulf	Pacific
07/16/25	142	114	168	124	134
07/09/25	141	115	144	123	133
07/17/24	144	123	110	150	150

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.

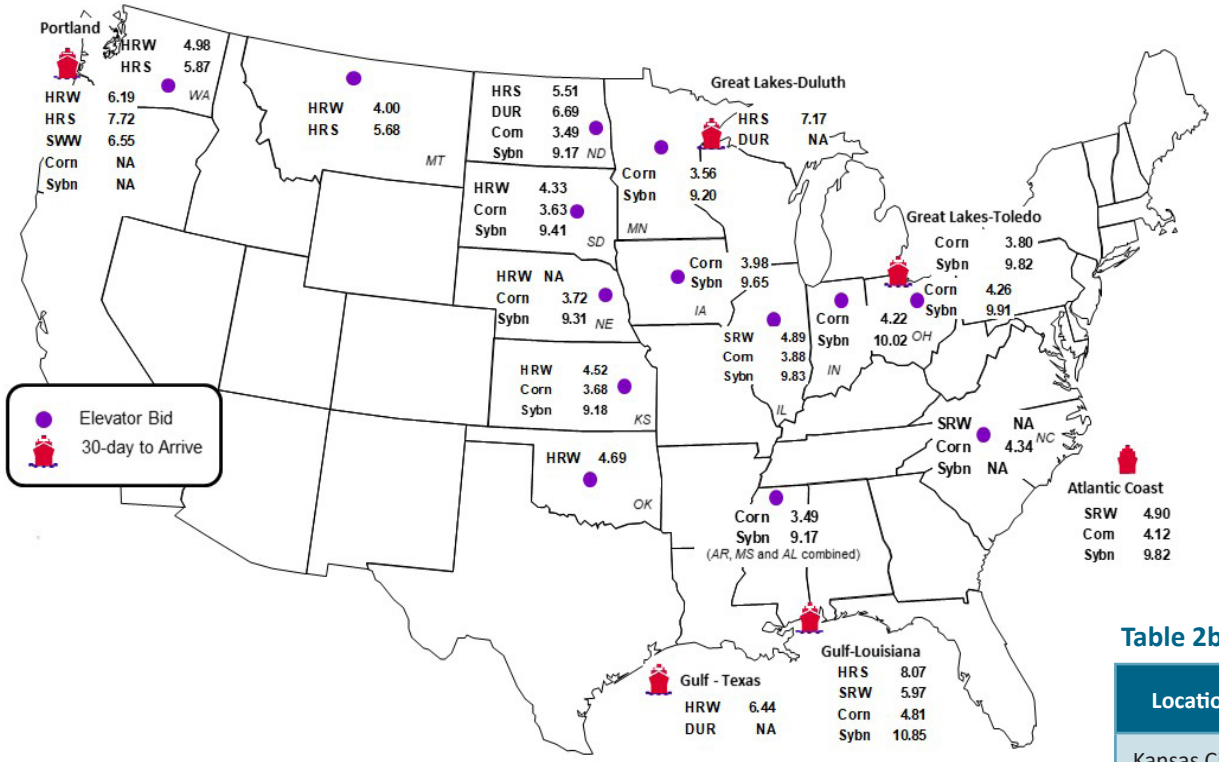
Figure 1. Grain transportation cost indicators as of week ending 7/16/25



Source: USDA, Agricultural Marketing Service.

Figure 2. Grain bid summary

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



Inland bids: 12% HRW, 14% HRS, #1 SRW, #1 DUR, #1 SWW, #2 Y Corn, #1 Y Soybeans
Export bids: Ord HRW, 14% HRS, #2 SRW, #2 DUR, #2 SWW, #2 Y Corn, #1 Soybeans
Note: HRW = Hard red winter wheat, HRS = Hard red spring wheat, SRW = Soft red winter wheat, DUR = Durum, SWW = Soft white winter wheat, Y = Yellow, Ord = Ordinary. Data from tables 2a and 2b derived from map information.
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

Commodity	Origin–destination	7/11/2025	7/3/2025
Corn	IL–Gulf	-0.93	-0.90
Corn	NE–Gulf	-1.09	-1.09
Soybean	IA–Gulf	-1.20	-1.22
HRW	KS–Gulf	-1.92	-1.97
HRS	ND–Portland	-2.21	-2.10

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	7/11/2025	Week ago 7/3/2025	Year ago 7/12/2024
Kansas City	Wheat	Sep	5.240	5.358	5.52
Minneapolis	Wheat	Sep	6.138	6.473	5.974
Chicago	Wheat	Sep	5.448	5.566	5.354
Chicago	Corn	Sep	4.124	4.368	4.090
Chicago	Soybean	Sep	10.072	10.49	10.456

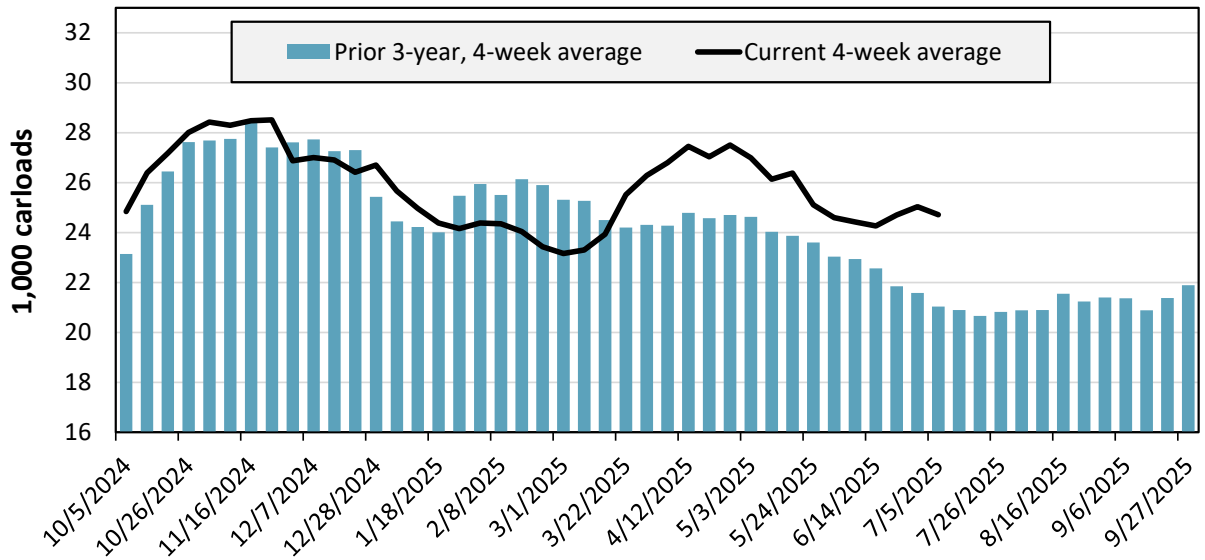
Sources: U.S. Inland: GeoGrain, USDA Weekly Bids, U.S. Export: Corn & Soybean - Export Grain Bids, AMS, USDA Wheat Bids - Weekly Wheat Report, U.S. Wheat Associates, Washington, DC.

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

For the week ending: 7/05/2025	East		West		Central U.S.		U.S. total
	CSXT	NS	BNSF	UP	CPKC	CN	
This week	1,297	2,526	9,898	5,317	2,298	1,532	22,868
This week last year	1,768	2,807	8,683	4,228	1,627	1,171	20,284
2025 YTD	43,564	76,017	293,978	154,189	72,107	37,386	677,241
2024 YTD	44,288	71,534	282,574	138,294	73,449	24,786	634,925
2025 YTD as % of 2024 YTD	98	106	104	111	98	151	107
Last 4 weeks as % of 2024	93	93	117	121	132	167	117
Last 4 weeks as % of 3-yr. avg.	88	93	125	113	146	120	117
Total 2024	87,911	143,353	557,544	279,532	142,383	58,512	1,269,235

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

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



For the 4 weeks ending July 5, grain carloads were down 1 percent from the previous week, up 17 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: 7/4/2025		East		West		Central U.S.		U.S. Average
		CSX	NS	BNSF	UP	CN	CPKC	
Average grain unit train origin dwell times (hours)	This week	17.5	32.7	23.0	21.5	9.6	41.4	24.3
	Average over last 4 weeks	19.7	33.7	19.3	19.6	9.8	26.0	21.3
	Average of same 4 weeks last year	29.7	31.3	18.9	19.4	6.7	n/a	21.2
Average grain unit train speeds (miles per hour)	This week	21.6	18.5	25.4	22.3	25.6	14.2	21.3
	Average over last 4 weeks	21.7	18.6	25.0	22.3	23.7	16.0	21.2
	Average of same 4 weeks last year	23.0	19.2	24.6	22.4	24.4	n/a	22.7

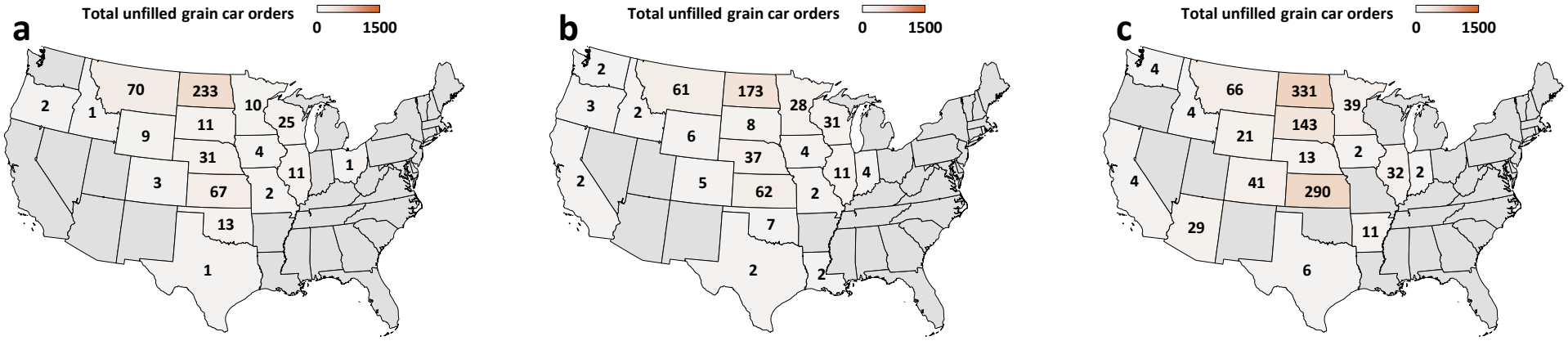
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

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

For the week ending: 7/4/2025		East		West		Central U.S.		U.S. Total
		CSX	NS	BNSF	UP	CN	CPKC	
Average number of empty grain cars not moved in over 48 hours	This week	17	8	243	60	9	426	764
	Average over last 4 weeks	24	7	256	82	10	318	697
	Average of same 4 weeks last year	8	10	522	86	5	n/a	631
Average number of loaded grain cars not moved in over 48 hours	This week	53	192	323	41	19	745	1,372
	Average over last 4 weeks	27	187	315	65	14	555	1,162
	Average of same 4 weeks last year	47	214	883	139	9	n/a	1,291
Average number of grain unit trains held	This week	0	0	4	6	0	9	20
	Average over last 4 weeks	1	1	3	5	0	7	16
	Average of same 4 weeks last year	1	3	18	8	0	n/a	29
Total unfilled manifest grain car orders	This week	1	4	242	86	0	176	509
	Average over last 4 weeks	5	2	258	86	0	128	479
	Average of same 4 weeks last year	2	2	651	364	0	n/a	1,018

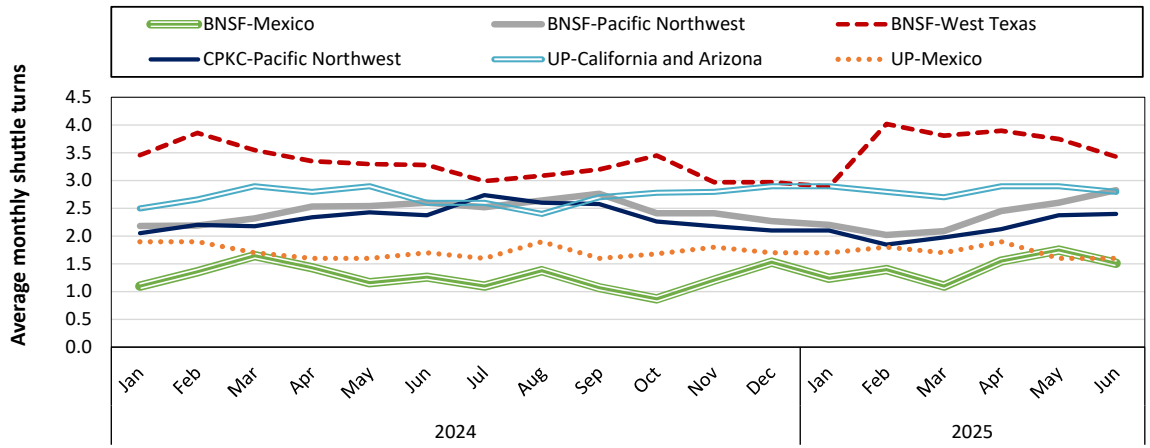
Note: NS = Norfolk Southern; UP = Union Pacific; CN = Canadian National; CPKC= Canadian Pacific Kansas City; n/a=not available.
These service metrics are published weekly on the Surface Transportation Board's website and on AgTransport. For more information on each service metric, see 49 CFR § 1250.2.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

Figure 4. Unfilled manifest grain car orders by State for the week ending 7/4/2025 (a); average over last 4 weeks (b); and average over same 4 weeks last year (c)



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

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

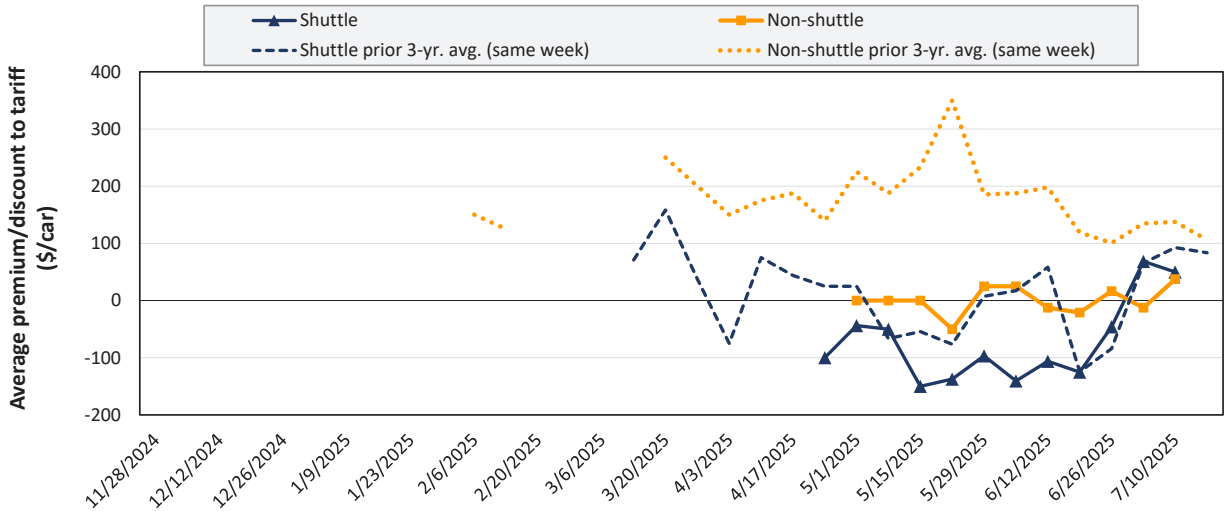


In June 2025, BNSF Railway's average monthly grain shuttle turns were 1.5 to Mexico, 2.8 to the Pacific Northwest, and 3.4 to West Texas. CPKC's shuttle turns averaged 2.4 to the Pacific Northwest. Union Pacific Railroad's shuttle turns averaged 2.8 to California and Arizona, and they averaged 1.6 to Mexico.

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

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

Figure 6. Secondary market bids/offers for railcars to be delivered in July 2025



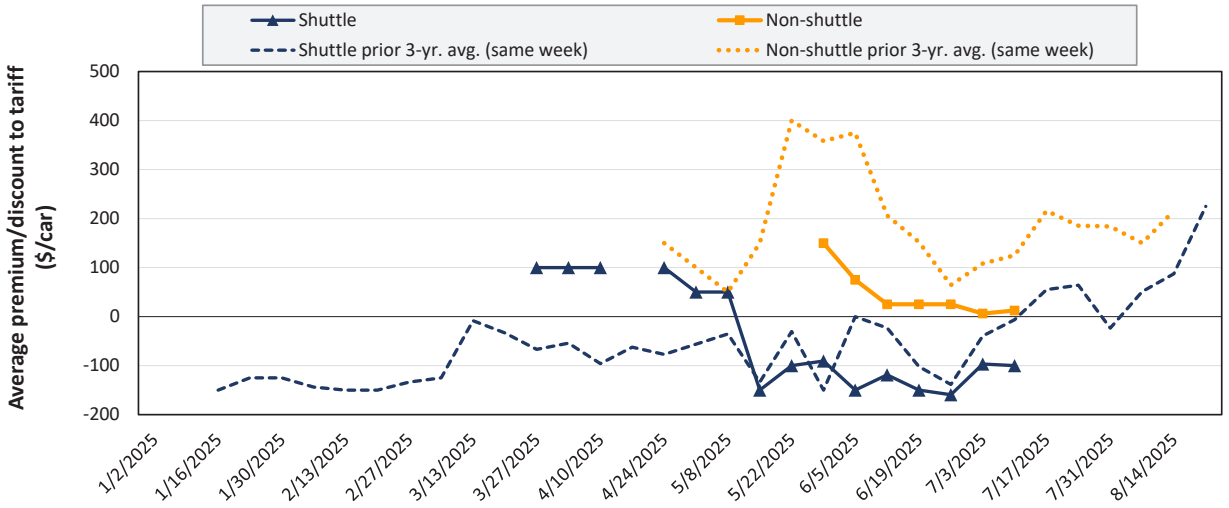
Average non-shuttle bids/offers rose $50 this week, and are at the peak.

Average shuttle bids/offers fell $18 this week and are $18 below the peak.

7/10/2025	BNSF	UP
Non-Shuttle	$38	n/a
Shuttle	$100	$0

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 7. Secondary market bids/offers for railcars to be delivered in August 2025



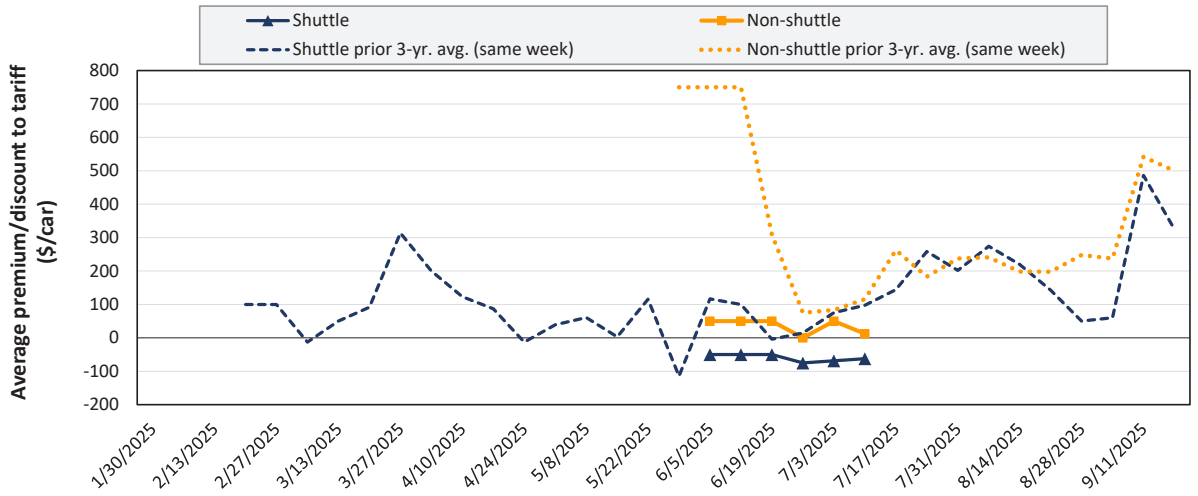
Average non-shuttle bids/offers rose $6 this week, and are $138 below the peak.

Average shuttle bids/offers fell $3 this week and are $200 below the peak.

7/10/2025	BNSF	UP
Non-Shuttle	$100	-$75
Shuttle	-$38	-$163

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

Figure 8. Secondary market bids/offers for railcars to be delivered in September 2025



Average non-shuttle bids/offers fell $38 this week, and are $38 below the peak.

Average shuttle bids/offers rose $6 this week and are $13 below the peak.

7/10/2025	BNSF	UP
Non-Shuttle	$100	-$75
Shuttle	$0	-$125

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service.
n/a = not available; avg. = average; yr. = year; BNSF = BNSF Railway; UP = Union Pacific Railroad.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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

For the week ending: 7/10/2025		Delivery period					
		Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
Non-shuttle	BNSF	38	100	100	n/a	n/a	n/a
	Change from last week	13	37	0	n/a	n/a	n/a
	Change from same week 2024	-88	-50	-50	n/a	n/a	n/a
	UP	n/a	-75	-75	n/a	n/a	n/a
	Change from last week	n/a	-25	-75	n/a	n/a	n/a
	Change from same week 2024	n/a	-275	-275	n/a	n/a	n/a
Shuttle	BNSF	100	-38	0	500	n/a	n/a
	Change from last week	-70	-44	38	0	n/a	n/a
	Change from same week 2024	-325	-463	-375	n/a	n/a	n/a
	UP	0	-163	-125	600	n/a	n/a
	Change from last week	33	38	-25	300	n/a	n/a
	Change from same week 2024	-275	-238	-225	125	n/a	n/a
	CPKC	-100	n/a	n/a	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 2024	-100	n/a	n/a	n/a	n/a	n/a

Note: Shuttle bids/offers are for shuttle trains—90+ grain cars that travel from a single origin to a single destination. Non-shuttle bids/offers are for cars in manifest service. Bids and offers represent a premium/discount to tariff rates; n/a = not available; BNSF = BNSF Railway; UP = Union Pacific Railroad; CPKC = Canadian Pacific Kansas City.
Source: USDA, Agricultural Marketing Service analysis of data from Tradewest Brokerage Company and the Malsam Company.

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

Table 6. Rail tariff rates for wheat shipments, July 2025

Primary wheat class	Railroad	Origin	Destination	Train type	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Durum	BNSF	Williston, ND	St. Louis, MO	Shuttle	$5,632	$83.09	$5,715.09	$1.54	$56.75	3.7
	BNSF	Williston, ND	Superior, WI	Shuttle	$4,091	$42.77	$4,133.77	$1.12	$41.05	6.5
	CP	Westby, MT	St. Louis, MO	Unit	$6,500	$368.80	$6,868.80	$1.86	$68.21	5.4
HRS	BNSF	Alton (Hillsboro), ND	Chicago, IL	DET	$4,604	$49.77	$4,653.77	$1.26	$46.21	5.5
	BNSF	Alton (Hillsboro), ND	PNW (Seattle, WA)	Shuttle	$6,015	$105.07	$6,120.07	$1.65	$60.78	3.0
	BNSF	Alton (Hillsboro), ND	Superior, WI	Shuttle	$2,665	$20.58	$2,685.58	$0.73	$26.67	11.5
	BNSF	Alton (Hillsboro), ND	Texas Gulf (Houston, TX)	Shuttle	$5,432	$107.03	$5,539.03	$1.50	$55.01	3.3
	BNSF	Bucyrus, ND	PNW (Seattle, WA)	Shuttle	$5,638	$88.69	$5,726.69	$1.55	$56.87	3.6
	BNSF	Macon, MT	PNW (Seattle, WA)	Shuttle	$5,212	$72.66	$5,284.66	$1.43	$52.48	4.3
	CP	Minot, ND	Kalama, WA	Unit	$5,498	$390.17	$5,888.17	$1.59	$58.47	4.4
	CP	Nekoma, ND	Chicago, IL	Manifest	$4,830	$234.49	$5,064.49	$1.37	$50.29	5.6
HRW	BNSF	Concordia, KS	Greenwood (Mendota), IL	Shuttle	$3,400	$44.66	$3,444.66	$0.93	$34.21	-12.6
	BNSF	Enid, OK	Texas Gulf (Houston, TX)	Shuttle	$3,600	$39.41	$3,639.41	$0.98	$36.14	-15.0
	BNSF	Garden City, KS	PNW (Seattle, WA)	Shuttle	$5,800	$133.00	$5,933.00	$1.60	$58.92	-15.0
	BNSF	Garden City, KS	San Bernardino, CA	DET	$5,700	$96.32	$5,796.32	$1.57	$57.56	-2.3
	BNSF	Garden City, KS	Texas Gulf (Houston, TX)	Shuttle	$4,200	$60.13	$4,260.13	$1.15	$42.31	-13.3
	BNSF	Salina, KS	Texas Gulf (Houston, TX)	Shuttle	$4,000	$52.99	$4,052.99	$1.10	$40.25	-14.1
	BNSF	Wichita, KS	Birmingham, AL	Shuttle	$3,500	$60.48	$3,560.48	$0.96	$35.36	-15.6
	BNSF	Wichita, KS	Chicago, IL	DET	$3,700	$44.31	$3,744.31	$1.01	$37.18	-13.2
	BNSF	Wichita, KS	Texas Gulf (Houston, TX)	Shuttle	$3,900	$44.66	$3,944.66	$1.07	$39.17	-12.5
	UP	Byers, CO	Houston, TX	Shuttle	$4,525	$325.64	$4,850.64	$1.31	$48.17	-9.0
	UP	Goodland, KS	Kansas City, MO	Manifest	$4,967	$121.80	$5,088.80	$1.38	$50.53	1.2
	UP	Medford, OK	Houston, TX	Shuttle	$3,775	$160.72	$3,935.72	$1.06	$39.08	-10.1
	UP	Salina, KS	Houston, TX	Shuttle	$4,025	$214.20	$4,239.20	$1.15	$42.10	-9.7
HRS/HRW	BNSF	Bowdle, SD	Chicago, IL	DET	$4,591	$54.04	$4,645.04	$1.26	$46.13	5.4
	BNSF	Conrad, MT	PNW (Seattle, WA)	Shuttle	$4,239	$53.06	$4,292.06	$1.16	$42.62	5.9
Soft white	BNSF	Templin (Ritzville), WA	PNW (Seattle, WA)	Shuttle	$2,032	$23.31	$2,055.31	$0.56	$20.41	-1.3
All classes (To East Coast flour mills)	CSX	Chicago, IL	Albany, NY	Manifest	$8,348	$0.00	$8,348.00	$2.26	$82.90	0.0
	CSX	Chicago, IL	Albany, NY	Unit	$7,413	$0.00	$7,413.00	$2.00	$73.61	0.0
	CSX	Chicago, IL	Buffalo, NY	Manifest	$5,924	$0.00	$5,924.00	$1.60	$58.83	0.0
	CSX	Chicago, IL	Indiantown, FL	Manifest	$8,568	$0.00	$8,568.00	$2.32	$85.08	0.0

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

Table 7. Rail tariff rates for corn and soybean unit/shuttle train shipments, July 2025

Commodity	Railroad	Origin	Destination	Car Ownership	Tariff (per car)	Fuel surcharge (per car)	Tariff + fuel surcharge (per car)	Tariff + fuel surcharge (per bushel)	Tariff + fuel surcharge (per metric ton)	Percent Y/Y change
Corn	BNSF	Clarkfield, MN	Hereford, TX	Railroad	$5,800	$74.62	$5,874.62	$1.48	$58.34	3.8
	BNSF	Clarkfield, MN	PNW (Seattle, WA)	Railroad	$5,470	$117.88	$5,587.88	$1.41	$55.49	-4.8
	BNSF	Edison, NE	Hanford, CA	Railroad	$6,000	$124.32	$6,124.32	$1.54	$60.82	2.6
	BNSF	Edison, NE	Hereford, TX	Railroad	$5,040	$50.96	$5,090.96	$1.28	$50.56	5.0
	BNSF	Edison, NE	PNW (Seattle, WA)	Railroad	$5,350	$123.13	$5,473.13	$1.38	$54.35	-5.0
	BNSF	Greenwood (Mendota), IL	Hereford, TX	Railroad	$4,560	$65.45	$4,625.45	$1.17	$45.93	5.1
	BNSF	Phelps (Rock Port), MO	Clovis, NM	Railroad	$4,800	$53.48	$4,853.48	$1.22	$48.20	5.2
	BNSF	Phelps (Rock Port), MO	Texas Gulf (Houston, TX)	Railroad	$4,540	$65.59	$4,605.59	$1.16	$45.74	5.1
	BNSF	Selby, SD	PNW (Seattle, WA)	Railroad	$5,430	$99.33	$5,529.33	$1.39	$54.91	-4.5
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$5,430	$116.62	$5,546.62	$1.40	$55.08	-4.9
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$271.01	$2,352.01	$0.59	$23.36	6.6
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$271.01	$2,732.01	$0.69	$27.13	5.7
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,047	$448.72	$5,495.72	$1.39	$54.58	-3.6
	CP	Glenwood, MN	Boardman, OR	Railroad	$5,513	$431.79	$5,944.79	$1.50	$59.03	1.6
	CSX	Haw Creek (Ladoga), IN	Ozark, AL	Railroad	$5,961	$0.00	$5,961.00	$1.50	$59.20	0.0
	CSX	Marysville, OH	Rose Hill, NC	Railroad	$6,139	$0.00	$6,139.00	$1.55	$60.96	0.0
	CSX	Olney, IL	Fairmount, GA	Railroad	$4,706	$0.00	$4,706.00	$1.19	$46.73	0.0
	KCS	Delhi, LA	Morton, MS	Railroad	$1,342	$40.80	$1,382.80	$0.35	$13.73	-0.6
	UP	Allen Station (San Jose), IL	Pittsburg, TX	Railroad	$4,085	$193.48	$4,278.48	$1.08	$42.49	5.7
	UP	Frankfort, KS	Calipatria, CA	Railroad	$6,005	$440.16	$6,445.16	$1.63	$64.00	2.7
	UP	Mead, NE	Keyes, CA	Railroad	$6,165	$486.36	$6,651.36	$1.68	$66.05	2.4
	UP	Nebraska City, NE	Amarillo, TX	Railroad	$5,005	$199.92	$5,204.92	$1.31	$51.69	4.6
	UP	Sloan, IA	Burley, ID	Railroad	$5,685	$329.28	$6,014.28	$1.52	$59.72	3.4
	UP	Sterling, IL	Nashville, AR	Railroad	$4,225	$202.44	$4,427.44	$1.12	$43.97	5.5
Soybeans	BNSF	Argyle, MN	PNW (Seattle, WA)	Railroad	$6,135	$106.96	$6,241.96	$1.69	$61.99	-4.2
	BNSF	Casselton, ND	PNW (Seattle, WA)	Railroad	$6,085	$102.83	$6,187.83	$1.67	$61.45	-4.1
	BNSF	Casselton, ND	St. Louis, MO	Railroad	$3,400	$59.85	$3,459.85	$0.94	$34.36	-25.0
	BNSF	Mitchell, SD	PNW (Seattle, WA)	Railroad	$6,185	$113.68	$6,298.68	$1.70	$62.55	-4.3
	BNSF	St. Cloud, MN	PNW (Seattle, WA)	Railroad	$6,235	$116.62	$6,351.62	$1.72	$63.07	-4.3
	CN	Gibson City, IL	Reserve, LA	Private	$2,081	$271.01	$2,352.01	$0.64	$23.36	7.0
	CN	Gibson City, IL	Reserve, LA	Railroad	$2,461	$271.01	$2,732.01	$0.74	$27.13	6.0
	CP	Enderlin, ND	Kalama, WA	Railroad	$5,785	$448.72	$6,233.72	$1.68	$61.90	-3.2
	CP	Enderlin, ND	East St. Louis, IL	Railroad	$3,526	$342.96	$3,868.96	$1.05	$38.42	-1.1
	CSX	Casey, IL	Mobile, AL	Private	$3,646	$0.00	$3,646.00	$0.99	$36.21	3.7
	CSX	Marion, OH	Chesapeake, VA	Private	$3,214	$0.00	$3,214.00	$0.87	$31.92	2.6
	UP	Canton, KS	Houston, TX	Railroad	$5,150	$209.16	$5,359.16	$1.45	$53.22	4.4
	UP	Cozad, NE	Kalama, WA	Railroad	$6,140	$437.36	$6,577.36	$1.78	$65.32	2.7
	UP	Cozad, NE	Houston, TX	Railroad	$5,510	$301.84	$5,811.84	$1.57	$57.71	3.6
	UP	Sloan, IA	Ama, LA	Railroad	$5,590	$344.68	$5,934.68	$1.60	$58.93	3.4

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. CP = Canadian Pacific Railway. CSX = CSX Transportation. KCS = Kansas City Southern Railway. UP = Union Pacific Railroad. n/a = not available. Although CP and KCS have merged into Canadian Pacific Kansas City (CPKC), their public tariffs currently remain separate. A larger dataset (with additional routes, calculations, and shipment characteristics) is available on AgTransport.

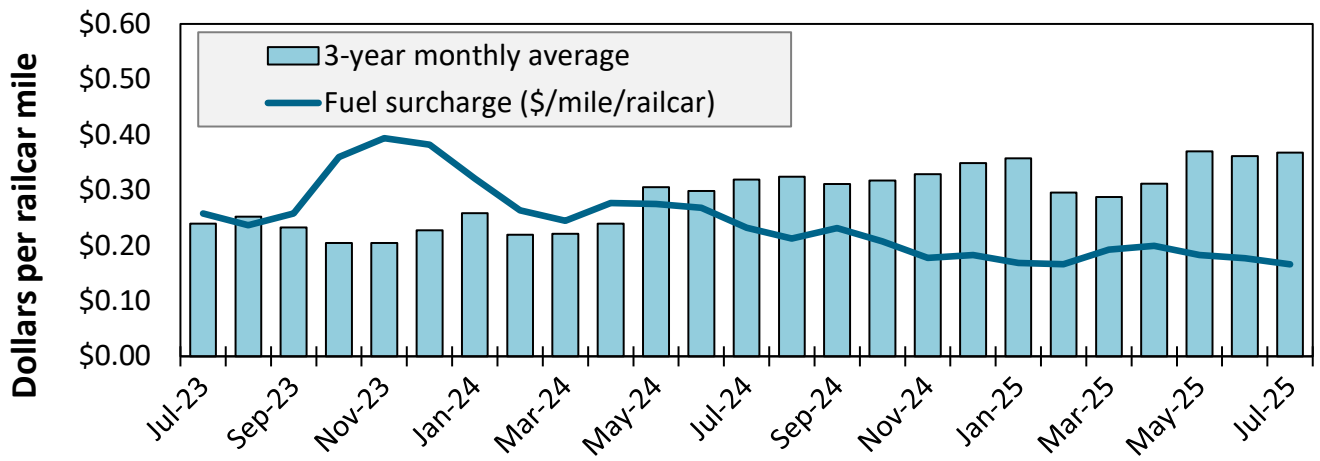
Source: BNSF, CN, CPKC, CSX, and UP.

Table 8. Rail tariff rates for U.S. bulk grain shipments to Mexico, July 2025

Commodity	US origin	US border city	US railroad	Train type	US rate plus fuel surcharge per car (USD)	US tariff rate + fuel surcharge per metric ton (USD)	US tariff rate + fuel surcharge per bushel (USD)	Percent M/M	Percent Y/Y
Corn	Adair, IL	El Paso, TX	BNSF	Shuttle	$4,650	$45.77	$1.16	-0.3	4.4
	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,415	$53.29	$1.35	-0.4	-
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,538	$54.51	$1.38	-0.4	-
	Polo, IL	El Paso, TX	BNSF	Shuttle	$4,658	$45.84	$1.16	-0.3	4.2
	Pontiac, IL	Eagle Pass, TX	UP	Shuttle	$5,043	$49.63	$1.26	-0.5	3.9
	Sterling, IL	Eagle Pass, TX	UP	Shuttle	$5,176	$50.94	$1.29	-0.5	3.7
	Superior, NE	El Paso, TX	BNSF	Shuttle	$5,071	$49.91	$1.27	-0.2	4.5
	Delhi, LA	Laredo, TX	CPKC	Non-shuttle	$3,995	$39.32	$1.00	-0.3	-
	Slater, MO	Laredo, TX	CPKC	Non-shuttle	$5,402	$53.17	$1.35	-0.4	
Soybeans	Atchison, KS	Laredo, TX	CPKC	Non-shuttle	$5,415	$53.29	$1.45	-0.4	-
	Grand Island, NE	Eagle Pass, TX	UP	Shuttle	$6,590	$64.86	$1.77	-0.4	3.0
	Marshall, MO	Laredo, TX	CPKC	Non-shuttle	$5,538	$54.51	$1.48	-0.4	-
	Roelyn, IA	Eagle Pass, TX	UP	Shuttle	$6,691	$65.85	$1.79	-0.4	2.9
	Corder, MO	Laredo, TX	CPKC	Non-shuttle	$5,389	$53.04	$1.44	-0.4	-
Wheat	FT Worth, TX	El Paso, TX	BNSF	DET	$3,087	$30.38	$0.83	-0.4	-26.9
	FT Worth, TX	El Paso, TX	BNSF	Shuttle	$2,887	$28.41	$0.77	-0.4	-23.7
	Great Bend, KS	Laredo, TX	UP	Shuttle	$4,354	$42.85	$1.17	-0.4	-10.1
	Wichita, KS	Laredo, TX	UP	Shuttle	$4,249	$41.82	$1.14	-0.4	-8.1
	Pratt, KS	Eagle Pass, TX	UP	Shuttle	$4,483	$44.12	$1.20	-0.4	-5.6

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

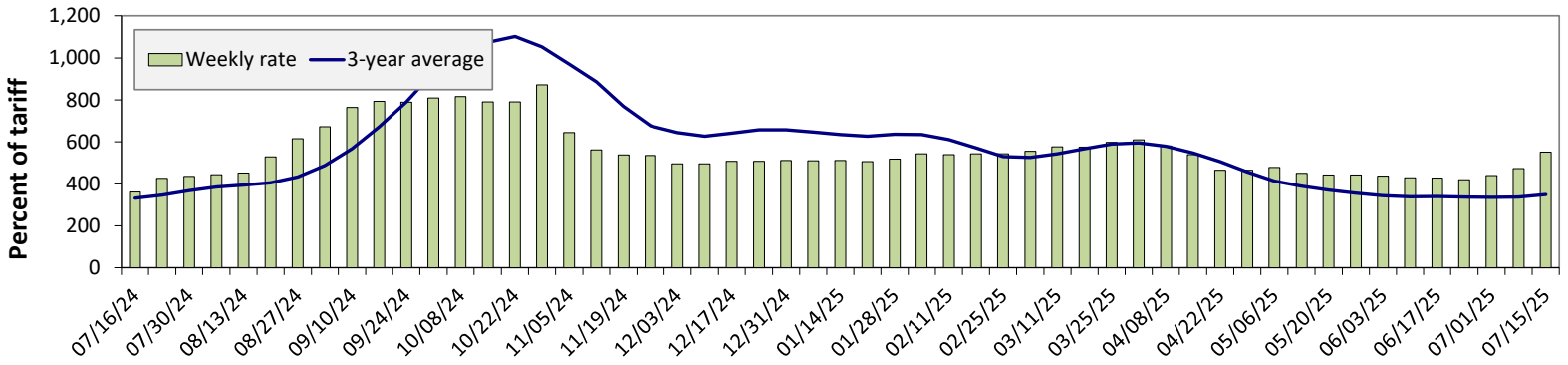
Figure 9. Railroad fuel surcharges, North American weighted average



July 2025: $0.17/mile, down 1 cent from last month’s surcharge of $0.18/mile; down 6 cents from the July 2024 surcharge of $0.23/mile; and down 20 cents from the July prior 3-year average of $0.37/mile.

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

Figure 10. Illinois River barge freight rate



For the week ending July 15: 16 percent higher than the previous week; 53 percent higher than last year; and 58 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

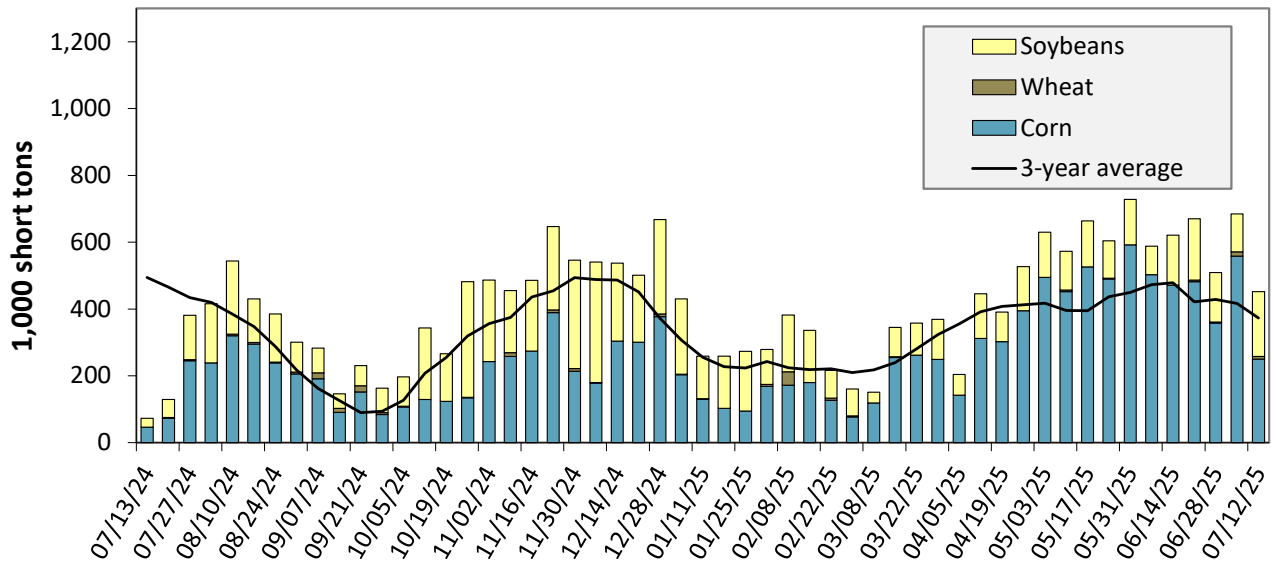
Measure	Date	Twin Cities	Mid-Mississippi	Illinois River	St. Louis	Ohio River	Cairo-Memphis
Rate	7/15/2025	594	578	550	400	354	319
	7/8/2025	584	510	472	332	325	289
$/ton	7/15/2025	36.77	30.75	25.52	15.96	16.60	10.02
	7/8/2025	36.15	27.13	21.90	13.25	15.24	9.07
Measure	**Time Period**	**Twin Cities**	**Mid-Mississippi**	**Illinois River**	**St. Louis**	**Ohio River**	**Cairo-Memphis**
Current week % change from the same week	Last year	30	54	53	54	34	46
	3-year avg.	34	50	58	44	11	19
Rate	August	628	593	593	486	500	497
	October	794	775	760	733	762	725

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 July 12: 519 percent higher than last year and 21 percent higher than the 3-year average.

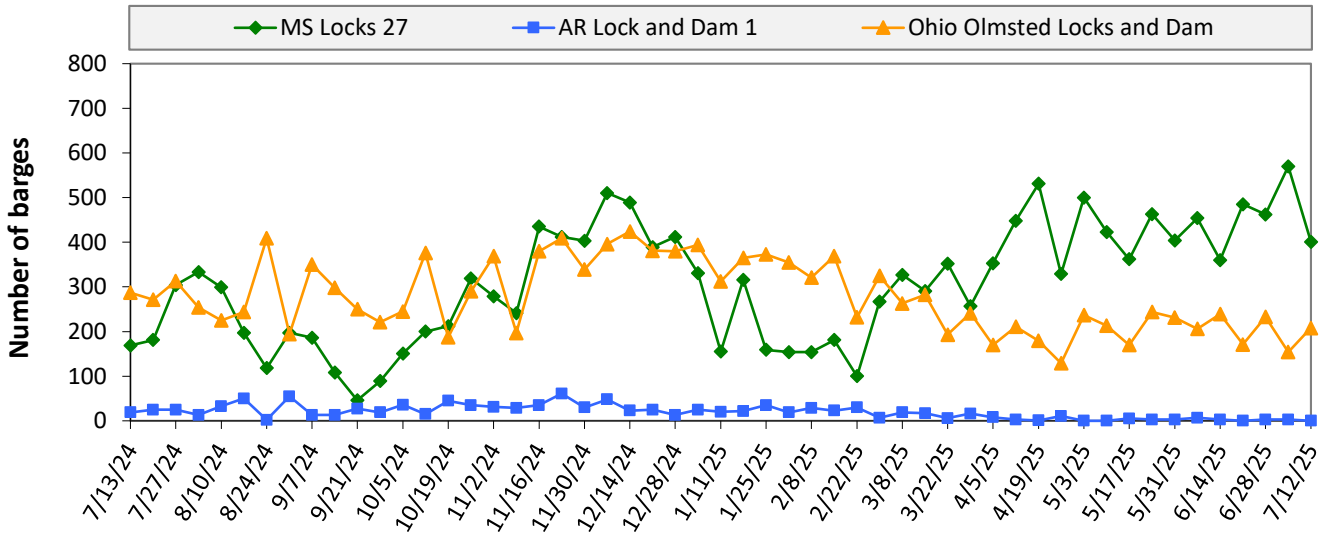
Note: The 3-year average is a 4-week moving average.
Source: U.S. Army Corps of Engineers.

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

For the week ending 07/12/2025	Corn	Wheat	Soybeans	Other	Total
Mississippi River (Rock Island, IL (L15))	120	3	122	0	245
Mississippi River (Winfield, MO (L25))	176	3	151	0	331
Mississippi River (Alton, IL (L26))	269	6	194	0	469
Mississippi River (Granite City, IL (L27))	250	8	194	0	452
Illinois River (La Grange)	100	5	66	0	170
Ohio River (Olmsted)	16	22	22	0	61
Arkansas River (L1)	0	41	0	0	41
Weekly total - 2025	267	71	216	0	554
Weekly total - 2024	179	28	69	2	278
2025 YTD	11,321	650	5,576	108	17,654
2024 YTD	7,524	889	5,720	141	14,274
2025 as % of 2024 YTD	150	73	97	76	124
Last 4 weeks as % of 2024	178	92	156	22	160
Total 2024	15,251	1,564	12,598	214	29,626

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

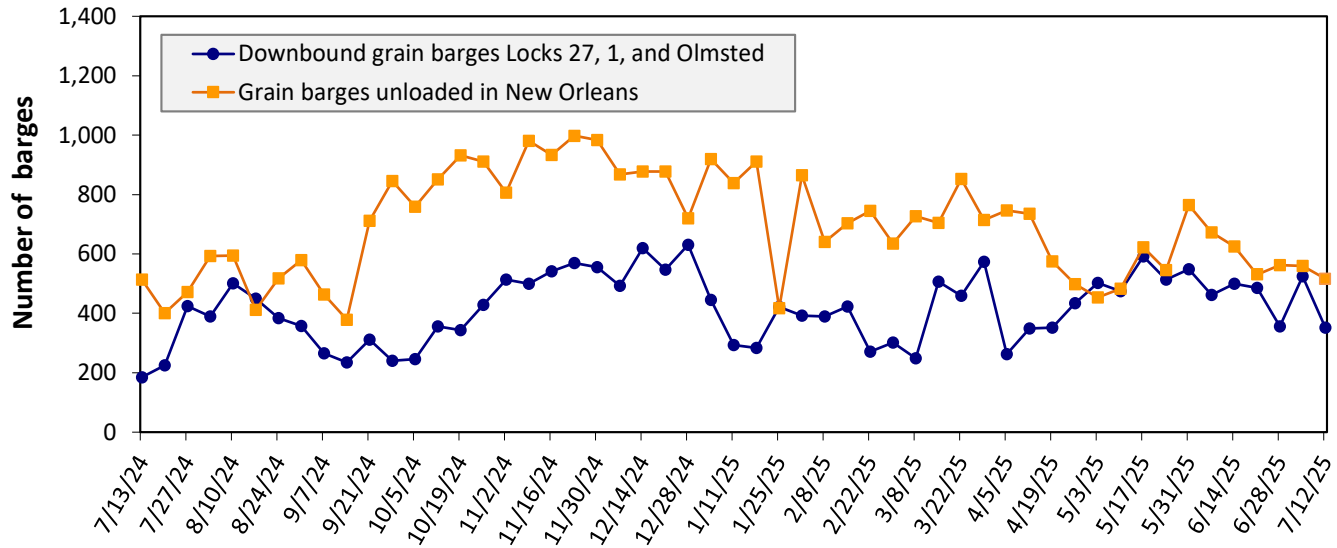
Figure 13. Upbound empty barges transiting Mississippi River Locks 27, Arkansas River Lock and Dam 1, and Ohio River Olmsted Locks and Dam



For the week ending July 12: 609 barges transited the locks, 118 barges fewer than the previous week, and 22 percent higher than the 3-year average.

Source: U.S. Army Corps of Engineers.

Figure 14. Grain barges for export in New Orleans region



For the week ending July 12: 352 barges moved down river, 173 fewer than the previous week; 516 grain barges unloaded in the New Orleans Region, 8 percent fewer than the previous week.

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

Table 11. Monthly barge freight rates Columbia-Snake River

River	Origin	$/ton			Current month % change from the same month	
		July 2025	June 2025	July 2024	Last year	3-year avg.
Snake River	Lewiston, ID/Clarkston, WA/Wilma, WA	$21.92	$21.63	$20.95	4.6	5.4
	Central Ferry, WA/Almota, WA	$21.02	$20.73	$20.08	4.7	5.3
	Lyons Ferry, WA	$20.01	$19.72	$19.11	4.7	5.0
	Windust, WA/Lower Monumental, WA	$18.98	$18.69	$18.12	4.7	4.8
	Sheffler, WA	$18.95	$18.66	$18.09	4.7	4.8
Columbia River	Burbank, WA/Kennewick, WA/Pasco, WA	$17.75	$17.46	$16.94	4.8	4.4
	Port Kelly, WA/Wallula, WA	$17.53	$17.24	$16.73	4.8	4.3
	Umatilla, OR	$17.43	$17.14	$16.63	4.8	4.3
	Boardman, OR/Hogue Warner, OR	$17.17	$16.88	$16.38	4.8	4.2
	Arlington, OR/Roosevelt, WA	$17.01	$16.72	$16.23	4.8	4.1
	Biggs, OR	$15.68	$15.39	$14.95	4.9	3.7
	The Dalles, OR	$14.58	$14.29	$13.89	5.0	3.2

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)

June, 2025	Wheat	Other	Total
Snake River (McNary Lock and Dam (L24))	208	0	208
Columbia River (Bonneville Lock and Dam (L1))	200	0	200
Monthly total 2025	200	0	200
Monthly total 2024	273	0	273
2025 YTD	1,929	0	1,929
2024 YTD	1,337	0	1,337

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.

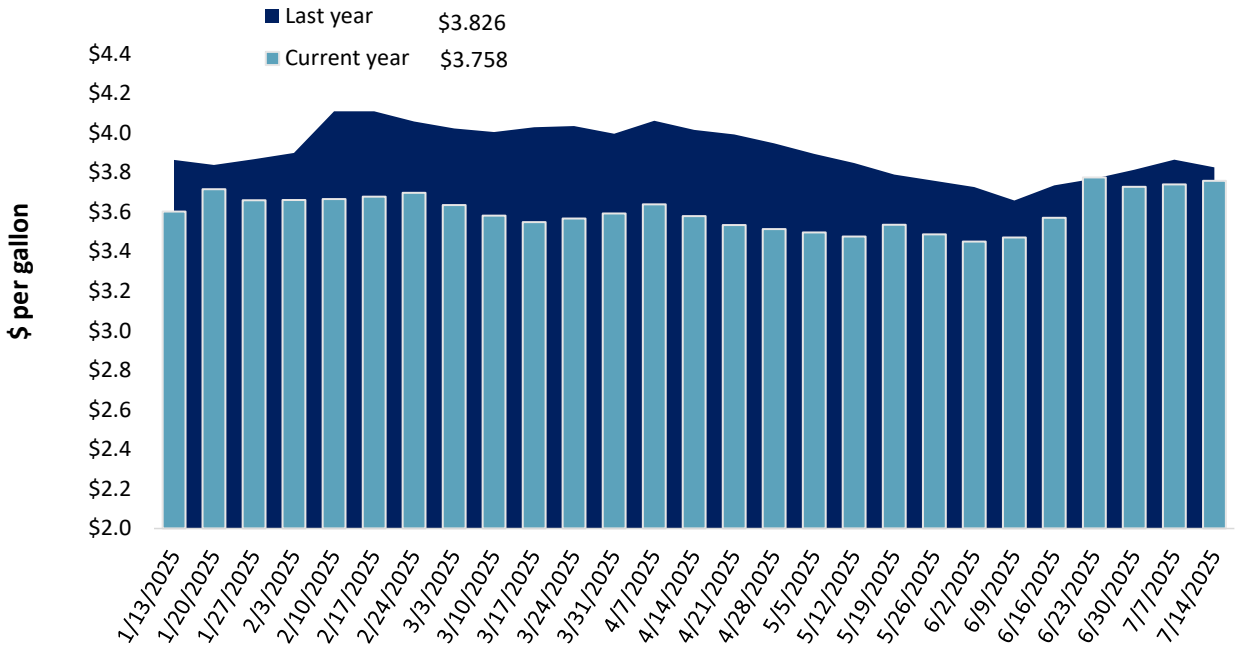
The weekly diesel price provides a proxy for trends in U.S. truck rates as diesel fuel is a significant expense for truck grain movements.

Table 13. Retail on-highway diesel prices, week ending 07/14/2025 (U.S. $/gallon)

Region	Location	Price	Change from	
			Week ago	Year ago
I	East Coast	3.793	0.028	-0.115
	New England	3.969	0.002	-0.140
	Central Atlantic	3.953	0.017	-0.114
	Lower Atlantic	3.716	0.036	-0.113
II	Midwest	3.733	0.000	-0.012
III	Gulf Coast	3.403	0.020	-0.148
IV	Rocky Mountain	3.713	0.047	-0.037
V	West Coast	4.498	0.036	0.048
	West Coast less California	4.122	0.034	0.092
	California	4.932	0.040	0.000
Total	United States	3.758	0.019	-0.068

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 July 14, the U.S. average diesel fuel price increased 1.9 cents from the previous week to $3.758 per gallon, 6.8 cents below 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 7/03/2025	2,150	1,082	1,756	916	106	6,010	11,466	4,182	21,658
	This week year ago	1,401	961	1,976	1,122	120	5,579	9,214	3,556	18,349
	Last 4 wks. as % of same period 2023/24	156	114	85	76	77	106	135	111	121
Current shipped (cumulative) exports sales	2024/25 YTD	769	202	503	241	22	1,736	57,903	46,257	105,897
	2023/24 YTD	347	162	470	564	0	1,542	45,059	41,266	87,868
	YTD 2024/25 as % of 2023/24	222	125	107	43	0	113	129	112	121
	Total 2023/24	3,535	4,260	6,314	3,906	526	18,540	54,277	44,510	117,328
	Total 2022/23	4,872	2,695	5,382	4,414	395	17,759	39,469	52,208	109,435

Note: The marketing year for wheat is June 1 to May 31 and, for corn and soybeans, September 1 to August 31. YTD = year-to-date; wks. = weeks.
Source: USDA, Foreign Agricultural Service.

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

For the week ending 7/03/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
Mexico	3,489	22,572	21,786	4	17,746
Japan	875	12,802	10,591	21	9,366
China	0	33	2,820	-99	8,233
Colombia	133	7,328	5,950	23	4,383
Korea	3	6,069	2,242	171	1,565
Top 5 importers	4,499	48,803	43,389	12	41,293
Total U.S. corn export sales	5,423	69,369	54,274	28	51,170
% of YTD current month's export projection	8%	99%	95%	-	-
Change from prior week	889	1,262	538	-	-
Top 5 importers' share of U.S. corn export sales	83%	70%	80%	-	81%
USDA forecast July 2025	67,949	69,854	57,280	22	-
Corn use for ethanol USDA forecast, July 2025	139,700	139,700	139,141	0	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (September 1 – August 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

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

For the week ending 7/03/2025	Total commitments (1,000 mt)			% change current MY from last MY	Exports 3-year average 2021-23 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25	YTD MY 2023/24		
China	0	22,479	24,392	-8	28,636
Mexico	498	5,073	4,823	5	4,917
Japan	95	2,039	2,082	-2	2,231
Egypt	0	3,374	1,357	149	2,228
Indonesia	24	1,933	2,029	-5	1,910
Top 5 importers	617	34,897	34,682	1	39,922
Total U.S. soybean export sales	1,837	50,439	44,822	13	51,302
% of YTD current month's export projection	4%	99%	97%	-	-
Change from prior week	248	503	150	-	-
Top 5 importers' share of U.S. soybean export sales	34%	69%	77%	-	78%
USDA forecast, July 2025	47,491	50,757	46,266	10	-

Note: The top 5 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2023/24 (September 1 – August 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

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

For the week ending 7/03/2025	Total commitments (1,000 mt)		% change current MY from last MY	Exports 3-year average 2022-24 (1,000 mt)
	YTD MY 2025/26	YTD MY 2024/25		
Mexico	1,360	1,216	12	3,358
Philippines	812	1,032	-21	2,473
Japan	676	569	19	2,045
China	0	69	-100	1,137
Korea	454	620	-27	1,674
Taiwan	303	336	-10	935
Thailand	233	288	-19	667
Nigeria	279	80	249	629
Indonesia	251	204	23	518
Colombia	246	115	114	489
Top 10 importers	4,613	4,527	2	13,926
Total U.S. wheat export sales	7,746	7,121	9	19,135
% of YTD current month's export projection	33%	32%	-	-
Change from prior week	568	222	-	-
Top 10 importers' share of U.S. wheat export sales	60%	64%	-	73%
USDA forecast, July 2025	23,133	22,480	3	-

Note: The top 10 importers are based on USDA, Foreign Agricultural Service (FAS) marketing year ranking reports for marketing year (MY) 2024/25 (June 1 – May 31). "Total commitments" = cumulative exports (shipped) + outstanding sales (unshipped), from FAS weekly export sales report, or export sales query. Total commitments' change (net sales) from prior week could include revisions from previous week's outstanding sales or accumulated sales. In rightmost column, "Exports" = accumulated exports (as defined in FAS marketing year ranking reports). mt = metric ton; yr. = year; avg. = average; YTD = year to date; "-" = not applicable.
Source: USDA, Foreign Agricultural Service.

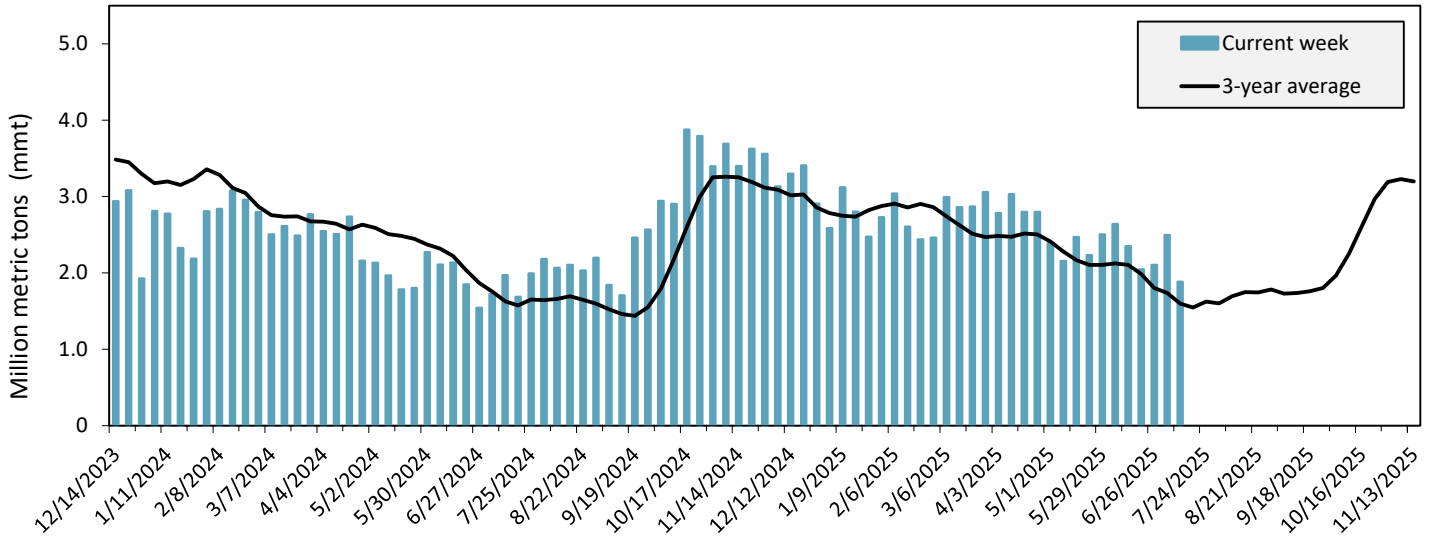
Table 18. Grain inspections for export by U.S. port region (1,000 metric tons)

Port regions	Commodity	For the week ending 07/10/2025	Previous week*	Current week as % of previous	2025 YTD*	2024 YTD*	2025 YTD as % of 2024 YTD	Last 4-weeks as % of:		2024 total*
								Last year	Prior 3-yr. avg.	
Pacific Northwest	Corn	462	506	91	13,697	10,169	135	143	217	13,987
	Soybeans	0	0	n/a	1,966	2,523	78	n/a	n/a	10,445
	Wheat	137	175	78	5,715	5,829	98	68	89	11,453
	All grain	599	681	88	21,484	19,606	110	113	151	37,186
Mississippi Gulf	Corn	600	705	85	20,386	14,093	145	148	145	27,407
	Soybeans	77	260	30	10,676	11,667	92	71	68	29,741
	Wheat	85	122	70	1,860	2,795	67	108	102	4,523
	All grain	762	1,088	70	32,922	28,610	115	125	122	61,789
Texas Gulf	Corn	12	0	n/a	170	274	62	65	86	570
	Soybeans	0	0	n/a	106	0	n/a	n/a	n/a	741
	Wheat	138	130	107	2,195	825	266	286	399	1,940
	All grain	150	130	115	2,698	3,075	88	153	170	6,965
Interior	Corn	214	344	62	7,213	7,305	99	117	141	13,463
	Soybeans	68	135	51	3,528	3,803	93	100	127	8,059
	Wheat	76	84	91	1,598	1,561	102	108	123	2,952
	All grain	367	571	64	12,648	12,797	99	112	135	24,753
Great Lakes	Corn	0	0	n/a	21	0	n/a	n/a	n/a	271
	Soybeans	0	0	n/a	0	18	0	n/a	n/a	136
	Wheat	3	10	28	138	185	75	108	182	653
	All grain	3	10	28	158	203	78	108	90	1,060
Atlantic	Corn	0	9	0	182	199	92	81	90	410
	Soybeans	2	5	32	465	437	107	206	32	1,272
	Wheat	1	1	n/a	36	13	282	102	146	73
	All grain	3	15	17	684	648	106	105	55	1,754
All Regions	Corn	1,287	1,564	82	41,668	32,038	130	138	160	56,109
	Soybeans	147	400	37	16,845	18,501	91	84	82	50,865
	Wheat	440	522	84	11,543	11,207	103	105	127	21,594
	All grain	1,883	2,495	75	70,698	64,993	109	120	133	133,979

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

The United States exports approximately one-quarter of the grain it produces. On average, this includes nearly 46 percent of U.S.-grown wheat, 47 percent of U.S.-grown soybeans, and 15 percent of the U.S.-grown corn. In 2024, approximately 48 percent of the U.S. export grain shipments departed through the U.S. Gulf region and 27 percent departed through the PNW.

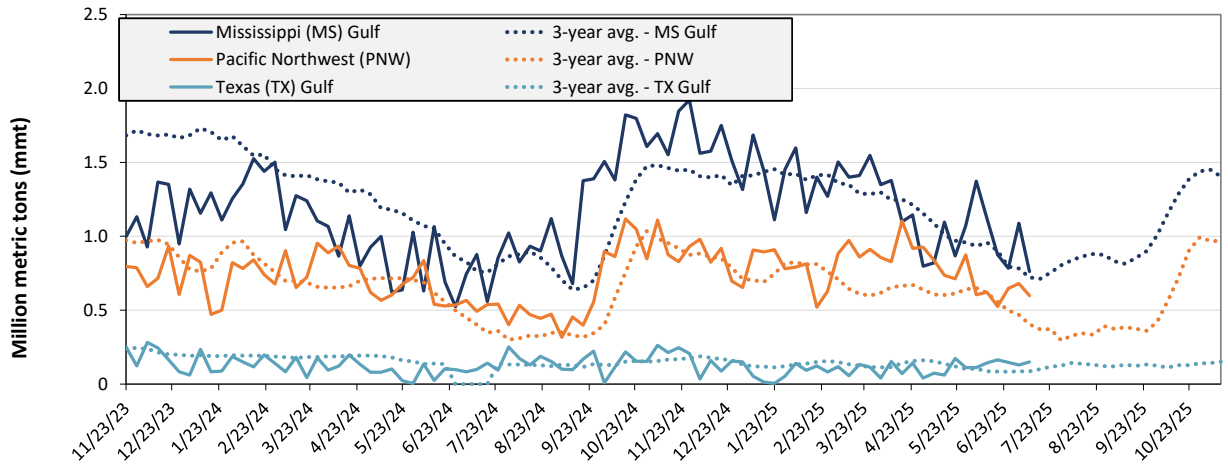
Figure 17. U.S. grain inspected for export (wheat, corn, and soybeans)



For the week ending Jul. 10: 1.9 mmt of grain inspected, down 25 percent from the previous week, unchanged from the same week last year, and up 18 percent from the 3-year average.

Note: 3-year average consists of 4-week running average.
Source: USDA, Federal Grain Inspection Service.

Figure 18. U.S. grain inspections for U.S. Gulf and PNW (wheat, corn, and soybeans)



Week ending 07/10/25 inspections (mmt):
MS Gulf: 0.76
PNW: 0.6
TX Gulf: 0.15

Percent change from:	MS Gulf	TX Gulf	U.S. Gulf	PNW
Last week	down 30	up 15	down 25	down 12
Last year (same 7 days)	down 9	up 52	down 2	up 22
3-year average (4-week moving average)	up 6	up 72	up 13	up 48

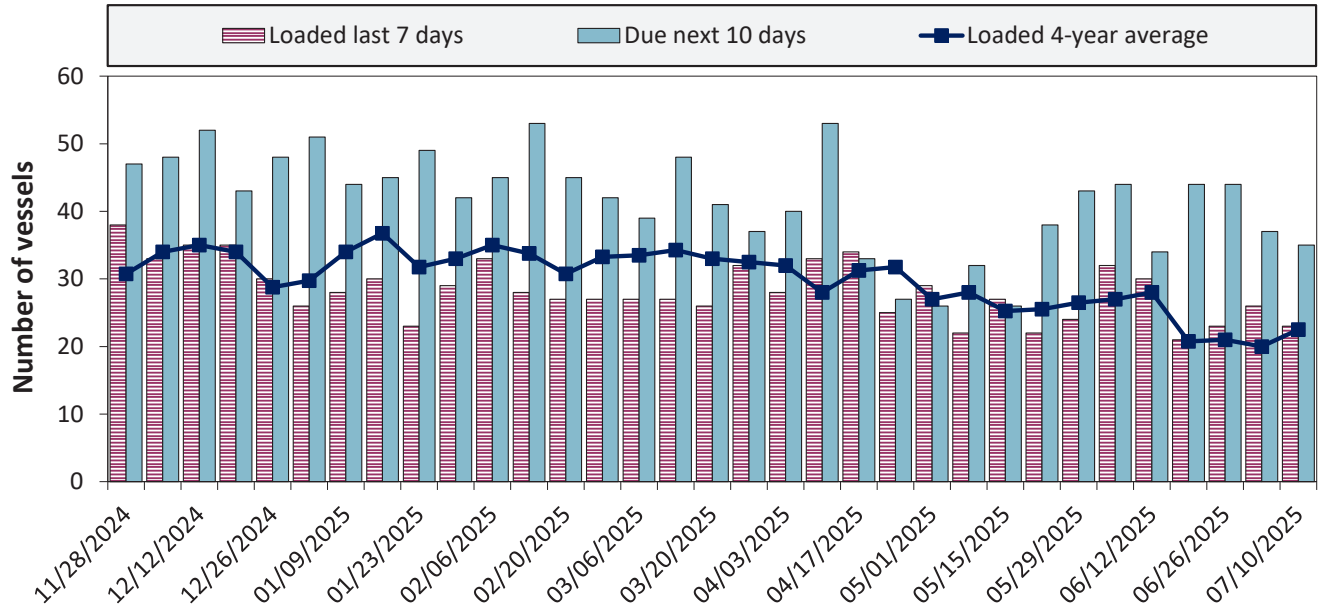
Source: USDA, Federal Grain Inspection Service.

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
7/10/2025	22	23	35	6
7/3/2025	17	26	37	5
2024 range	(11…45)	(18…38)	(29…61)	(3…25)
2024 average	28	28	45	13

Note: The data are voluntarily submitted and may not be complete.
Source: USDA, Agricultural Marketing Service.

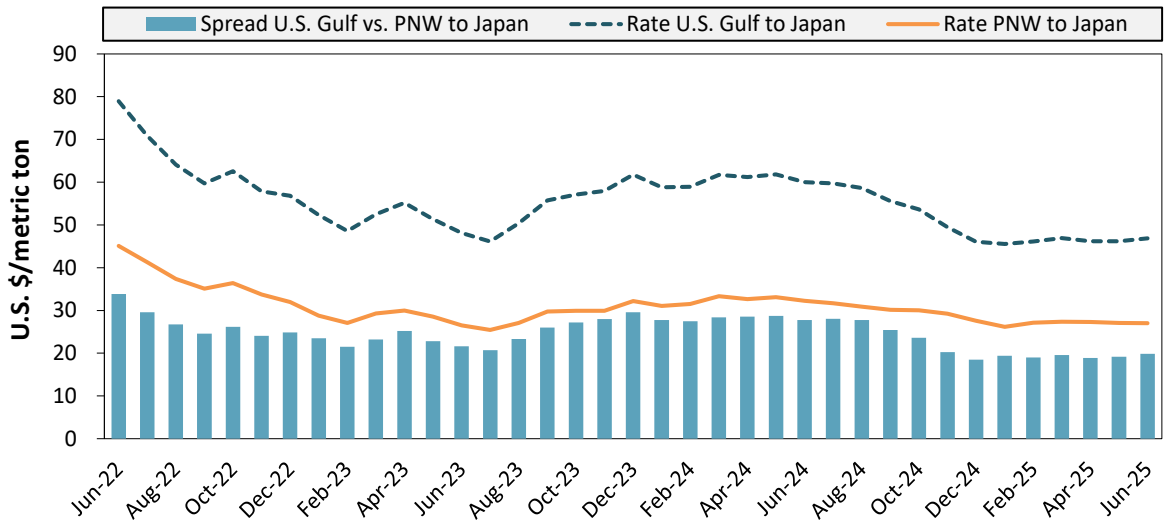
Figure 19. U.S. Gulf vessel loading activity



Week ending 07/10/25, number of vessels	Loaded	Due
Change from last year	0%	-13%
Change from 4-year average	2%	-14%

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
June 2025	$46.88	$27.00	$19.88
Change from June 2024	-22%	-16%	-28%
Change from 4-year average	-27%	-25%	-30%

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

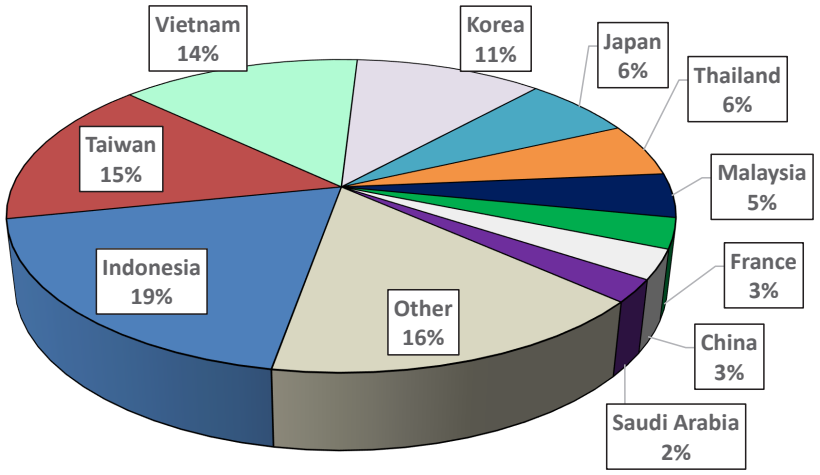
Table 20. Ocean freight rates for selected shipments, week ending 7/12/2025

Export region	Import region	Grain types	Entry date	Loading date	Volume loads (metric tons)	Freight rate (US$/metric ton)
U.S. Gulf	S. Korea	Heavy grain	Jun 23, 2025	Jul 1/10, 2025	58,000	55.50
U.S. Gulf	Morocco	Soybeans	May 23, 2025	Jun 5/15, 2025	46,000	42.38
PNW	Japan	Corn	Apr 22, 2025	Jun 1/10, 2025	65,000	34.75
PNW	Taiwan	Wheat	Mar 28, 2025	May 1/10, 2025	50,000	39.75
PNW	S. Korea	Heavy grain	Feb 28, 2025	Apr 5/May 5, 2025	65,000	28.00
EC S. America	China	Heavy grain	May 16, 2025	Jun 12/22, 2025	80,000	33.40
NC S. America	China	Heavy grain	May 6, 2025	May 20/31, 2025	66,000	35.50
Brazil	China	Heavy grain	July 11, 2025	Jul 20/31, 2025	63,000	41.50
Brazil	China	Heavy grain	July 10, 2025	Aug 5/15, 2025	64,000	40.00
Brazil	China	Heavy grain	Jun 23, 2025	Jul 20/30, 2025	63,000	34.00
Brazil	China	Heavy grain	Jun 23, 2025	Jul 11/15, 2025	63,000	34.75
Brazil	China	Heavy grain	Jun 5, 2025	Jun 25/30, 2025	63,000	37.50
Brazil	China	Heavy grain	Jun 5, 2025	Jun 21/30, 2025	63,000	34.25
Brazil	S. Korea	Corn	May 21, 2025	May 24, 2025	66,000	36.85
Brazil	N. China	Grain	May 9, 2025	Jun 1/7, 2025	64,000	36.50
Brazil	China	Heavy grain	May 7, 2025	Jun 20/Jul 20, 2025	63,000	32.75
Brazil	N. China	Heavy grain	Apr 30, 2025	May 20/31, 2025	66,000	35.50
Brazil	China	Heavy grain	Mar 13, 2025	May 1/31, 2025	63,000	35.00

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
Source: Maritime Research, Inc.

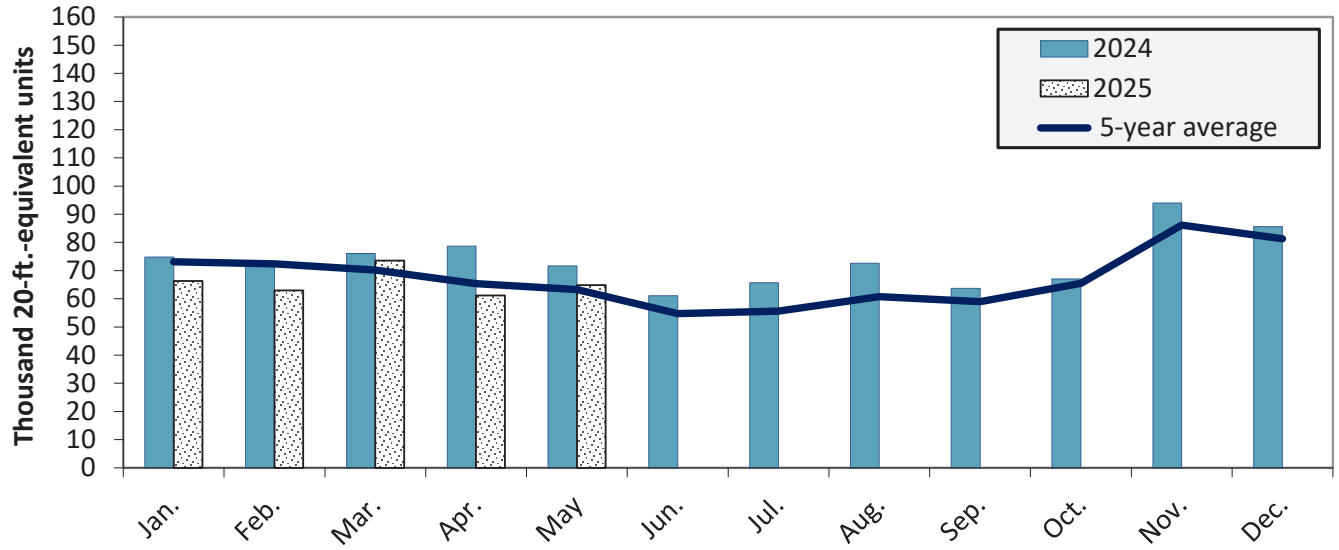
In 2024, containers were used to transport 10 percent of total U.S. waterborne grain exports. Approximately 55 percent of U.S. waterborne grain exports in 2024 went to Asia, of which 16 percent were moved in containers. Approximately 84 percent of U.S. waterborne containerized grain exports were destined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

Figure 21. Top 10 destination markets for U.S. containerized grain exports, Jan-May 2025



Note: The following harmonized tariff codes are used to calculate containerized grains movements: 1001, 100190, 100199, 100119, 1002, 100200, 1003, 100300, 1004, 100400, 1005, 100590, 1007, 100700, 100790, 110100, 1102, 110220, 110290, 1201, 120100, 120190, 120810, 230210, 230310, 230330, 2304, 230400, and 230990.
Source: USDA, Agricultural Marketing Service analysis of PIERS data, S&P Global.

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



Containerized grain shipments in May 2025 were down 9.5 percent from last year but up 2.5 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.

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

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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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